

Protecting Tomorrow-Today."

**Online RMS** 

11.11

**User Guide** 

6 December 2022

# Caliber Public Safety Online RMS 11.11 User Guide 6 December 2022

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Online RMS11.11 Caliber Public Safety

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# **Table of Contents**

Chapter 1. Introduction	1
Overview	1
Login Page	1
Production Site	2
Training Site	2
Caliber Main Website	2
Night Versus Day Mode	2
Set Mode Preference	3
Default Mode	3
Toggle Mode	4
Login Screen	4
Dashboard	5
Password Rules	5
Password Reset	6
Forgotten Password	7
Reset Password via Email	7
Change Password from My Profile	8
Administrator Password Reset	8
User Account Inactivity Deactivation	8
Home Page	8
Main Area	10
Pinned Records	10
Notifications	11

Top Navigation Bar Area	11
User Ribbon	11
User Information Menu	11
New Notification Alert	12
Toggle Night Versus Day Mode	13
Logout	13
Recent Activities	14
Quick Links	14
External Links	15
Charts	16
Mobile Device Friendly	16
Broadcast Messages	18
Adding a Broadcast Message	20
Deleting a Broadcast Message	22
Notifications	23
New Notifications	23
Show All Notifications	25
Search Notifications	27
Delete Notifications	27
Add Notifications	28
Entering Dates and Times	30
Calendar Tool	30
Text Fields, Drop-Downs, Buttons, Check Boxes	31
Text Fields	31
Drop-Down Lists	31

Buttons	32
Function Buttons	32
Radio Buttons	32
Floating Buttons	32
Check Boxes	33
Required Fields	33
Column Sorting	34
SmartSearch	35
Export Search Results	35
Personnel Management	36
Printing from Online RMS	37
Chapter 2. Navigation Icons	39
Home Button	39
Incidents Button	39
Master Indices Button	40
Records Management Button	41
Forms And Reports Button	42
Help Options	42
User Information Menu	43
My Profile	44
Manage Home Page	44
Daily Log	45
Image Upload	46
Logout	46
Chapter 3. My Profile	49

My Profile Overview	49
Access My Profile	49
My Profile Page Layout	50
User Information	50
User Quick Links	51
Change Password	51
Change Security Questions	51
Change Home Agency	51
Create Assignment	51
Go To	51
Profile Information Tab	53
Preferences Tab	53
External Searches Tab	55
Subscriptions Tab	56
Officer Information Tab	57
Account History Tab	59
Chapter 4. Submit Ticket	61
Submit Ticket Overview	61
How To Submit a Ticket	61
Chapter 5. Custom Forms	63
Custom Forms Overview	63
Search For and View Custom Forms	63
Chapter 6. Attachments	67
Attachments Overview	67
Add Attachments	67

Edit Attachments	69
Delete Attachments	70
Download Attachments	71
Chapter 7. Image Library	73
Image Library Overview	73
Upload Image	73
Manage Library	76
Delete Image Files	77
Download Image Files	78
Import Images From Library	78
Chapter 8. Master Indices	81
Master Indices Overview	81
Master Index Security	83
Master Indices Security Levels	83
User Account Index Security Levels	83
Accessing Master Indices	84
Searching Master Records	85
Person Search	86
Search Mug Shots By Physical Description	88
Additional Search Criteria	89
Power Search	89
Search Results	90
View Person Details	90
Master Index Associations	93
Person Active Alerts	94

View Mobile Person Results in Online RMS	96
Address Search	96
Adding Master Index Records	97
Adding Person	97
Manual Entry	100
Enter Person Information	100
Enter Caution Codes	101
Enter Residence Address	101
Add Multiple Addresses	102
Enter Relations Information	102
Enter Vehicle Information	102
Save Entry	102
Import/Update Person Results from External Systems	103
Import New Person	103
Update Existing Person	106
Adding Address	107
Specific Address	108
Intersections	109
Dynamic Map Marker	111
Other Countries	111
Caution Codes	112
Adding Photos	112
Adding the First Photo	112
Adding Additional Photos	115
Adding Property	116

Duplicate Records	118
No Duplicates Found	119
Possible Duplicates Found	119
Person Duplicates	120
Residence Address Duplicates	121
Vehicle Duplicates	123
Caution Codes	125
Related Events	126
Deleting Master Index Records	128
Print Master Person Records	129
Subscribe to Master Records	132
Chapter 9. Photo Lineup	135
Photo Lineup Overview	135
Access Points	135
Records Management Menu	135
View and Edit Person Pages	136
Follow-up Case Management module.	137
Create Photo Lineup	138
Remove a Photo	143
Search Lineups	144
Print Photo Lineup	146
View, Edit, Delete Lineups	146
View	147
Edit	148
Delete	149

Access Log	150
Delete Log	150
Chapter 10. Crime Visualization Tool	153
Crime Visualization Tool Overview	153
Spider Chart	155
Spider Chart Components	159
Structure and Terminology	159
Manually Re-size the Chart	160
Mouse	160
Keyboard	161
Resizing Icons	161
Manually Reposition the Chart	161
Re-Center and Filter the Chart	161
Access Points	162
Incident Report	163
Field Contact	163
Master Indices Detail Pages	164
Chapter 11. Calls for Service	167
Calls For Service Overview	167
Track and Document Calls	167
Create Field Arrest and Import Call Data	168
Access Calls For Service	168
Manage Calls for Service	168
Initiate New Call	170
Edit a Call	171

Call Information Tab	173
Officers Tab	173
People Tab	174
Vehicles Tab	174
Incident Reports Tab	175
History Tab	176
Attachments Tab	176
Call List	177
Edit, Take, View Calls	177
Clear, Dispatch, or Mark Call as OnScene	178
Close a Call	179
Search Calls for Service	179
Chapter 12. Incidents	185
Incidents Overview	185
Top Buttons	187
Google Maps Integration	188
Incident Report – Requirements And Rules	189
Incident Security	190
Incident Report – Report Validations	193
View Incident Audit Trail	194
Create Incident Report	195
Incident Report Tabs	197
Header Tab	198
Report Types & Times	198
Location	202

Officers	205
Offenses Tab (Mass Offense Entry)	208
Offenses Tab (Single Offense Entry)	211
Names Tab	215
Quick Select Names - CFS People	216
Offenders Section-Adding Unknown Offender(s)	217
Offender Section-Adding Known Offender(s)	218
Offender Section-Create and Edit Field Arrest	219
Incident Victim(s)	220
Adding Organization as Victim	220
Other Names	222
Changing a Name	223
Property & Vehicles Tab	223
Add Property	224
Add Vehicle	232
Add Existing Impound	234
Print Labels, Receipts, Chain of Custody	235
Narrative Tab	236
Attachments Tab	241
Validations Tab	242
Submit For Approval	243
Disapproval Notice Corrections	244
Summary Tab	247
Add Criminal Complaints	250
Add Court Case	251

Add Associated Incidents	252
Crash Reporting	254
Copy an Incident	254
Incident Templates	258
Creating Incident Templates	258
Applying Incident Templates	260
View Incident Reports	261
Create Field Arrest from Incident	263
Incident Search	266
SmartSearch	267
Printing Options	271
Changing Incident Status	273
From View Incident Report	273
From the Incident Management Menu	275
Disapprove	276
Change back to Initial Report	276
Transfer Incident Report	277
My Recent Activities	277
Incidents Menu	278
Delete Initial Incident Report	279
Add Attachments Outside Incident Workflow	280
Expunging Records	282
Chapter 13. Supplement to Incident Reports	283
Create Supplements	283
Supplement Rules	285

Supplement Templates	285
Chapter 14. Community Reporting	287
Community Reporting Overview	287
Taking Action on Submitted Forms	288
Taking Action via Notifications	288
Reject	291
Review without a Police Report	291
Review and File a Police Report	292
Taking Action via Recent Activities	296
Chapter 15. Criminal Complaint	297
Criminal Complaint Overview	297
Accessing Criminal Complaint Module	298
Standalone Module	298
From the Field Arrest	298
From the Incident Report	298
From Recent Activities	299
Criminal Complaint Search	299
Add a Criminal Complaint	301
Edit a Criminal Complaint	304
View a Criminal Complaint	311
Submit Criminal Complaint for Approval	313
Take Action on Disapproved Notifications	315
Chapter 16. Court Case	317
Court Case Overview	317
Accessing the Court Case Module	317

Standalone Module	317
From the Criminal Complaint	318
From the Incident Report	318
Court Case Search	318
Court Case Add	320
Edit Court Case	322
View Court Case	325
Chapter 17. Court Appearances	329
Court Appearances Overview	329
Accessing Court Appearances	329
From the Incidents Top Menu	329
From the Court Case	330
From Recent Activities	330
Court Appearances Search	332
Court Appearances Add	334
Court Appearances Edit	336
View Court Appearances	338
Chapter 18. Field Arrest	339
Field Arrest Overview	339
Recent Activities	339
Open Field Arrests	342
Field Arrests Pending Release	342
Search Field Arrests	342
Create Field Arrest Manually	345
Create Field Arrest and Import Data	349

Edit Field Arrest	353
Officer	360
Associated Events	360
Create Incident	361
Select Existing Incident	362
Select Existing Call	363
Validations on Field Arrest Imports	364
Charges and Warrants	365
Names	367
Next of Kin/Emergency Contact	368
Victim, Other Names, Other Organizations	368
Property	369
Release Property	371
Vehicle/Towing	372
Associate a Vehicle	372
Add Vehicle Tow/Impound	374
Criminal Complaints	375
Narrative	377
Attachments	379
Questions	380
Validations	380
Log	381
Duplicate Field Arrest	382
Delete Field Arrest	384
View Arrest Delete Log	385

	Print Field Arrest	387
3	hapter 19. Field Contacts	391
	Overview	391
	Add a Field Contact	392
	Search for a Field Contact	394
	Edit a Field Contact	396
	View a Field Contact	398
	Enter or Update Field Contact Details	399
	Location, People, Vehicles, Gangs, Organizations	399
	Officers	401
	Attachments	402
	Incidents	402
	Calls for Service	402
	Attached Forms	402
	Delete a Field Contact	. 403
	Print Field Contacts	. 403
3	hapter 20. Incident Mapping	405
	Access Incident Mapping	405
	Screen Layout	405
	Filter Options Window	406
	Query Window	409
C	hapter 21. Supervisory Functions	411
	Supervisory Function Overview	411
	Approve/Disapprove Incident Report	411
	Initiate from Recent Activities	412

Initiate from Notifications	413
Initiate from the Incident	414
Approval/Disapprove Process	415
Approval Utilities	416
Disapproval Comments	417
Edit the Incident Report	419
Finalize the Approval Process	419
Approve or Disapprove Field Arrests	422
Approve	424
Disapprove	424
Approve or Disapprove Criminal Complaint	425
Approval Levels	425
Approve the Complaint	425
1-Level Approval Process	427
2-Level Approval Process	428
Submit to Court	429
Disapprove	430
Incident Security	430
Incident Management	432
Assign Supplement	432
Delete Incident Report	432
Incident Status	433
Incident Status Log	433
Incident Delete Log	434
Using Charts to Visualize Data	434

Home Page Image Charts	434
Interactive Charts	435
Offense Activity	436
Open Field Arrests	437
Snapshot	438
Unapproved Incidents	438
Calls for Service	438
Chapter 22. Case Management	439
Case Management Overview	439
What is the difference between an Incident Report and a Case?	439
Accessing the Case Management Module	440
Case Management Form	441
Pin Case	441
Case Management Contains Four Tabs	442
Create a Follow-Up Case	443
Initiate from the Initial Unapproved Incident Report	444
Initiate through Incident Review	444
Initiate from the Case Management Menu	447
Enter Case Data	447
Assign Officer to Case	452
Associate an Incident	453
Create Incident	453
Associate Existing Incident	455
Associate a Field Arrest	455
Associate a Field Contact	456

Set Case Security Level	457
Close Incident with no Follow-Up Case	458
Navigating Throughout the Case	459
Review Cases	462
Create Case Activity	465
Update Case Activity	469
Case Load	475
Investigative Case Tags	476
Show My Case Activities	477
Print Case	478
Chapter 23. Evidence/Property Mgmt Module	481
Evidence/Property Mgmt Module Overview	481
Check-In From Notification	481
Evidence/Property Mgmt Access	483
Evidence/Property Management Landing Page	485
Evidence/Property Management Tab	486
Chain of Custody	486
Check-In	489
Check-Out	492
Dispose	494
Transfer Custody	496
Change Ownership	497
Change Location	499
Requested Processing	501
Schedule Disposition	502

Audit Reports	504
Search Audit Reports	505
Create a New Audit Report	505
Create Location Discrepancy Audit Report	507
Property Locations	509
Quick Search Tab	510
Quick Check-In Tab	510
Print Labels, Chain of Custody, Receipts	511
Print Chain of Custody	511
Print Label	512
Print Receipt	513
Chapter 24. Barcode Search Process	515
Barcode Search Process Overview	515
Location Barcode Report	516
Mega Menu	516
Create Evidence or Held Property without An Incident Report	517
Chapter 25. Officer Daily Log	521
Officer Daily Log (ODL) Overview	521
Create New Log	523
Access Existing Log	525
Assignment Tab	527
Officers	527
Vehicle & Equipment	528
Service Request	530
Activity Log Tab	531

Add Activity Log	531
Edit Activity Log	532
Delete Activity Log	532
Switch to Edit Status	532
Log Search	533
Post and Un-post Logs	535
Post Logs	535
Post Logs from Search Results	535
Post Log Currently Viewing	536
Un-Post Log	536
Print Report	537
Close or Exit the Daily Log	537
Close the Daily Log	538
Exit the Daily Log	539
Switch to Edit Status	540
Help and Tips	542
Chapter 26. Citations Enforcement	543
Citations/Enforcement Overview	543
Add a New Citation	544
Edit Citation	546
View Citation	549
Enter or Update Citation Details	551
Person, Vehicle, Location, Organization	552
Racial Profiling	554
Violations and Charges	554

Bond	554
Associate Incident Reports	555
Relate Citations	555
Associate Other Related Reports	555
Attached Forms	556
Attachments	556
All Other Sections	556
Duplicate Citation	557
Delete Citation	558
Print Citation	559
Chapter 27. Permits	561
Permits Overview	561
Search Permits	562
Add Permit	564
Edit Permit	565
Chapter 28. Warrants	569
Warrants Overview	569
Warrant Search	570
Add Warrant	572
Edit Warrant	577
Warrant Information Tab	579
Choose or Add Alias Name	579
Warrant Log Tab	581
Attachments Tab	582
Duplicate Warrant	582

Activate Warrant	584
Serve Warrant	586
Warrant Log	589
Warrant Attachments	591
Print Warrant Report	592
Delete Warrant	592
View Warrant Delete Log	594
Chapter 29. Civil Process	595
Overview	595
Court Paper	596
Search	596
Add	598
Edit Court Paper	599
Print Court Paper	604
Add Mileage/Attempts and Fees	605
Status Details	606
Chapter 30. Vehicle Tow/Impound	607
Overview	607
Search Vehicle Tow/Impound	609
Enter New Vehicle Tow	612
Update Existing	614
Tow/Impound Tab	615
Vehicle Information	616
People	616
Organizations	617

Tow Summary	617
Officers	618
Vehicle Description	618
Towing	619
Inventory	619
Attachments	620
Holds Tab	620
Log Tab	620
Vehicle Holds	621
Place a Hold	621
Release Holds	622
Release Vehicles	624
Logs	625
Print	626
Chapter 31. Inventory and Assets	629
Inventory Overview	629
Inventory Roles	629
Inventory Management Page	630
Add Inventory	630
Search for Existing Inventory	632
Add to Existing Inventory	633
Add New Inventory	635
Edit Entries	636
Browse	637
Check In	642

	Packs	644
	Inspections / Audits	645
	User Inventory Management	646
		647
	Self Checkout	647
	Self Check In / Transfer	650
	Dispose Consumable Items	651
C	Chapter 32. Fleet Management	653
	Overview	653
	Fleet Management Permission Categories	653
	Fleet Manager	654
	Fleet Management Dashboard	654
	Manage Fleet Crash Reports	659
	Search Fleet Crash Reports	659
	Add Crash Report	661
	Delete Crash Report	662
	Edit Crash Report	663
	Crash Details	665
	Officer/Employee	667
	Associate Incident	668
	References	668
	Insurance	669
	Service/Maintenance Records	669
	Crash Towing	670
	Attachments	671

Manage Equipment	671
Search Equipment	672
Add Equipment	673
Delete Equipment	675
Edit Equipment	676
Manage Vehicles	677
Search Vehicles	677
Add Custom Forms to Fleet Vehicle and Assignments	681
Add Vehicles	684
Delete Vehicles	687
Edit Vehicles	688
Vehicle Assignments	692
End Assignments	694
Manage Fuel, Oil, Mileage	695
Add a Service Request	699
Edit a Service Request	701
Approve a Service Request	702
Take Action on a Service Request Notification	702
Edit the Vehicle	703
Complete a Service Request	705
Delete Service Requests	706
Add Service Maintenance and Repair	707
Update Service Maintenance and Repair	711
Mid-Level Fleet Manager Overview	713
Fleet Officer	714

View Vehicle	716
Search All Vehicles	717
Add or Update Overview	719
Add and Update Attachments	721
Add a Service Request	721
Update Service Requests	722
Delete Service Requests	723
Manage Fuel, Oil, and Mileage	724
Self-Assign Vehicles	728
End Self-Assignments	730
Delete Assignments	730
Delete Data	731
Fleet Clerk	731
Search Vehicles	733
Add Fuel , Oil, and Mileage	734
Edit Fuel , Oil, and Mileage	736
Delete Fuel , Oil, and Mileage	736
Chapter 33. Lost and Found Property	739
Lost and Found Property Overview	739
Standalone Module	739
Search Lost and Found Property	741
Specific Record	743
Multiple Records	744
Add Lost and Found Property	744
Create a New Master Property Index Record	744

Create the Property Lost & Found Record	746
Edit Lost and Found Property	746
Delete Lost and Found Property	748
Dispose Lost and Found Property	749
Dispose Multiple (Mass) Records	750
Dispose a Specific Record	750
Mass Lost and Found Functions	752
Mass Dispose	753
Mass Change Custody	754
Print Labels	755
Incident Report Lost and Found	755
Chapter 34. Expungements	757
Expungements Overview	757
External Repositories	759
Interfaces	759
Un-Expunge	760
Accessing the View Person Page	760
Expunge Offender or Arrestee	761
Expungement Results	764
Offender or Arrestee Name Restrictions	765
Other Expunged Data Restrictions	765
Expunge Field Arrest	766
Expungement Results	768
Un-Expunge	769
Chapter 35. Training Videos	771

Training Videos Overview	771
Benefits of Video-Based Learning	771
Video Rules and Requirements	771
Acknowledgment Required vs. Optional	772
Training Videos Library	772
Access the Training Videos Library	773
Understanding the Training Videos Library	773
Videos can be divided into groups	773
Video Elements	774
Filter Video List	775
Show Videos Added in Last Number of Day(s)	775
Show Watched or Unwatched Videos	775
Show Videos with Combined Criteria	776
Watch Training Videos	777
Chapter 36. Training Module	781
Overview	781
Training Module Dashboard	782
Courses	786
Template	786
Course Instance	786
Manage Courses	787
Search Courses	787
Add Course	790
Edit Course	792
Cancel Course	798

Manage Certifications	798
Search Certifications	799
Add Certification	801
Edit Certification	802
Printing Courses	807
Chapter 37. Reports	809
Reports Overview	809
Chapter 38. Interfaces	813
Interfaces Overview	813
Citation to Court Case Management System	813
CAD to RMS Calls for Service	813
Master Vehicles	815
InterDEx Queries	816
Hunter Camera	818
General Guidelines	819
Take Photos	819
LiveScan	821
General Guidelines	821
Transmit LiveScan	821
LexisNexis Queries	822
Appendix A. Training Accounts	A
Generic Training Accounts	A
Appendix B. Resetting Passwords	c
Resetting OnlineRMS Password	C
Forgotten Password Procedure	D

Appendix C. Incident Based Reporting	
Overview	G
Role and Permission Requirements	J
Filter	J
Reports on Page Adjustment	K
Additional Filters	L
Warnings	L
Generate the Submission File	M
Flat File	N
XML File	P
Statistics Report	Q
Run Summary UCR Reports	R
Finalize Data Set	V
Errors Reported	W
Accepting Reports after Error Reports have marked Rejected	W
Glossary	Y
Index	AS

# **Chapter 1. Introduction**

#### Overview

Online RMS is a comprehensive information management system designed specifically to meet the needs of federal, state, and local law enforcement and investigative agencies. It is the result of more than a decade of research, development, and direct feedback from hands-on users who prepare reports, manage records, investigate crime, and deploy resources on a day-to-day basis. Online RMS provides agency access to a central data hub to connect law enforcement with external data networks such as N-DEx, National Crime Information, and other local RMS databases.

Access to Online RMS begins with the customizable **Home Page**. For more information on the **Home Page** refer to "Home Page" on page 8.

## Login Page

Online RMS is Internet based so it allows for anytime, anywhere access. As a user you will have access to the **Production** and **Training site**.



#### **Production Site**

https://rms.public-safety-cloud.com/prod/

#### **Training Site**

https://rmstrain.public-safety-cloud.com/train/

It is suggested to create a shortcut on your desktop and/or add the sites as Favorites on your Internet browser.

#### Caliber Main Website

https://caliberpublicsafety.com

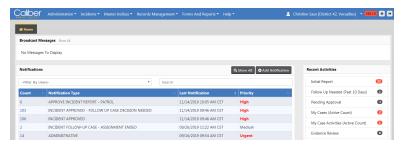
For best performance, Caliber Public Safety recommends using a computer, laptop, or tablet purchased within the last three years; running an industry popular web browser that is actively supported by the browser manufacturer and connects to the internet using DSL, Cable, or 4G cellular. The browser must support TLS 1.2 or higher.

### Night Versus Day Mode

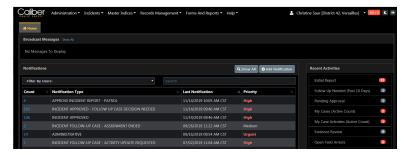
The Online RMS application offers a choice of two background colors: White or Black; Day Mode or Night Mode respectively. The Day Mode background appears by default when the application launches at login; however, you can set your Mode Preference to default to Night Mode if you wish.

You can also toggle between Day Mode and Night Mode at any time while in the application, regardless of the default setting.

#### Day Mode



## Night Mode



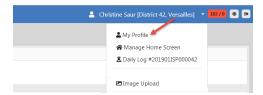
### Set Mode Preference

You can set the **Mode** to always default to either **Day Mode** or **Night Mode** when the application launches, and you can also temporarily switch between **Modes** as often as you wish during your logged in session.

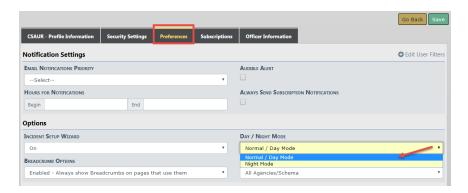
#### Default Mode

The **Day Mode** background appears by default when the application launches at login; however, you can set your **Mode Preference** to default to **Night Mode** at login if you wish.

1. Click on your login name on the top menu bar, then select My Profile.



2. Click on the **Preferences** tab in the *Manage User* window, then choose the **Mode** you wish to use as the default.



3. Click the **Save** button and a confirmation message briefly appears.



### Toggle Mode

You can temporarily toggle between Day Mode and Night Mode as often as you like during your current logged in session, regardless of the default setting.

There are two ways to toggle between **Modes**:

- A toggle button on the Login screen.
- Click on your *login name* on the top menu bar of the Dashboard.

#### Login Screen

Click the Switch to Night Mode button to change the background color from white to black.

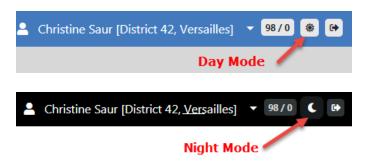


Click the **Switch to Day Mode** button to change the background color from black to white.



#### **Dashboard**

The icon to the left of your login name at the top of the *Dashboard* displays the **Mode** that is currently active. Click on the **Mode** icon to toggle between day and night **Mode**.



# **Password Rules**

Each user will have a unique User ID and Password.

RMS Password validation enforces defined policy configuration that align with the HBI CJS Security Policy Basic Password Standard. It is recommended that agencies also implement a departmental policy for end-user password compliance.

- After initial log-in you will be prompted to set up security questions.
- Passwords are not displayed on entry.
- Passwords are encrypted for storage and transmission.
- Passwords expire every ninety (90) days.

- This option is configurable at the schema level for sites requiring expiration days different than the default configuration. Contact Caliber Support for assistance in updating this configuration setting.
- Change password using the following rules:
  - Minimum length shall be eight (8) characters. This option is configurable at the schema level for sites requiring a minimum length different than the default configuration. Agency admins should contact Caliber Support for assistance in updating this configuration setting.
  - It shall be case sensitive.
  - It shall be alphanumeric and allow for special character.
  - It shall contain one lower case letter, one capital letter, and one number.
  - It shall not be the same as the User ID.
  - Passwords are on a default rotation of ten (10) passwords. Passwords must cycle through ten passwords before re-use. This option is configurable at the schema level for sites requiring a rotation different than the default configuration. Agency admins should contact Caliber Support for assistance in updating this configuration setting.

#### Notes:

- 1. By default, you will have three (3) attempts to enter a correct password. After these attempts have been exhausted, you will be prompted to reset your password. If you are unable to reset your password using the above methods, you will need to contact your agency administrator.
  - This option is configurable at the schema level for sites requiring unsuccessful login attempts different than the default configuration. Agency admins should contact Caliber Support for assistance in updating this value.
- 2. Advance Authentication options are available. Agency admins should contact Caliber Support for more information.

## **Password Reset**

There are three ways to reset a password:

Select **Reset Password** on the login page.

- Request to Reset Password via Email.
- From My Profile.
- Administrator resets your password.

## Forgotten Password

- Click Reset Password on the Login Page.
- 2. Provide correct answers to your Security Questions.
- 3. If you answer correctly, you are prompted to create a new password.

If you do not remember the answers to the security questions, see "Reset Password via Email" below.

#### Reset Password via Email

You can have a new temporary password emailed to you, which can come in handy when you have forgotten your security answers.

- 1. Click Reset Password on the Login Page.
- Click the Reset Password via Email button at the bottom of the Security Questions page.

**Note**: There is also a **Reset Password via Email** button on the *Change Password* link of My Profile. For information on My Profile, refer to "My Profile Overview" on page 49.

- 3. An email containing a temporary password is sent to your email account on file.
- 4. Enter the temporary password then create a new password when prompted.

## Change Password from My Profile

1. Click **Change Password** on My Profile. For more information, refer to "My Profile Overview" on page 49.

#### Administrator Password Reset

Your agency administrator has the ability to reset your password without submission of a Caliber Public Safety support ticket. Contact your administrator to request a password reset.

# **User Account Inactivity Deactivation**

Online RMS enforces a User Account Inactivity Policy in accordance with CJS Security requirements. User accounts that remain inactive for ninety days are automatically deactivated. A warning email is sent to the user thirty days prior to account deactivation.

From: noreply@interact911.com [mailto:noreply@interact911.com]

Sent: Thursday, August 17, 2017, 4:00 AM

To: CSmith@gmail.com>

Subject: Your Caliber RMS Account Will Expire in 30 days.

Chris Smith, your Caliber RMS account will become deactivated in 30 days due to inactivity. Failure to log into your account within the next 30 days will require you to contact a System Administrator to reactivate your account. After a total of 60 days, the user's account will become inactive.

For more information refer to the agency administrator.

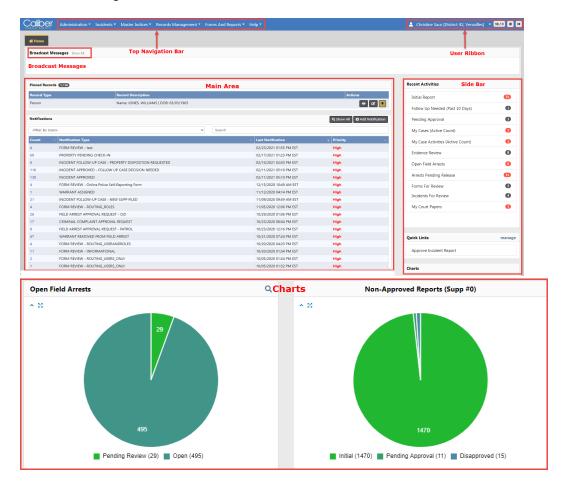
# **Home Page**

Online RMS is a comprehensive information management system. Access to Online RMS begins with the customizable **Home page**. This page can display any combination of recent activities, charts of crime statistics, links to the most frequently used functions in the system, external links to frequently referenced web sites and documents, broadcast messages from the command and control center or other officers in the field, outstanding reports that need approval or additional information, and various other items.

When you first log into Online RMS, the **Home Page** displays. You can access the **Home page** from anywhere within RMS by clicking on the **Caliber** logo that is located on the top left of the window.



The basic structure of the **Home Page** consists of a Top Navigation Bar, User Ribbon, Broadcast Messages, Main Area, Side Bar and Charts.



The **Home Page** content and layout varies by user. With proper permissions, you can change what you display in the panels and which order.

For information on managing the **Home Page** layout, refer to the *Manage Front Screen Layout* section of "User Information Menu" on page 43.

#### Main Area

Pinned Records and Notifications appear in the Main Area. You have the option to change the display order or remove content; perhaps you prefer *Notifications* to appear before Pinned Records, or you don't want Pinned Records to appear on your Home Page.

Refer to the Manage Front Screen Layout section of "User Information Menu" on page 43 for instructions.

#### Pinned Records

You can pin incident reports, cases, or person records to your Home Page for quick access.

By default, you can pin up to 50 records.

The pinned record count and remaining available pin count displays on the section title bar.



- Your agency administrator has the ability to change the maximum number of pinned records.
- If you attempt to pin a record while at the maximum number, you are notified you need to unpin other records first.
- The pin counter color changes to yellow when within five records from the maximum.
- The pin counter color changes to red when at the maximum count.

With appropriate permissions you can view, edit, or unpin the pinned records from the Home Page using the buttons under the Actions column. A button will not display if you do not have permission to perform the function.



When unpinning records, you must navigate from the Home Page for it to take effect. This allows you to re-pin the record if it was unpinned by accident.

For information on pinning incident reports, cases, or person records, refer to the respective sections.

#### **Notifications**

This area presents a grouped list of Notifications specific to the logged-in user.

For more information on *Notifications*, refer to "Notifications" on page 23.

## **Top Navigation Bar Area**

The Top Navigation Bar provides access to Incidents, Master Indices, Records Management, Forms and Reports, and Help menus. The Administration menu also appears for users with proper permissions.

The Top Navigation Bar adapts to mobile devices by utilizing a Collapsible Menu. For more information, refer to "Mobile Device Friendly" on page 16

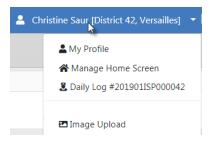
#### **User Ribbon**

The User Ribbon contains user information with menu options from which to choose, new notifications alert, a button to toggle between the night and day setting, and a button to log out.

The User Ribbon adapts to mobile devices by utilizing a Collapsible Menu. For more information, refer to "Mobile Device Friendly" on page 16

#### **User Information Menu**

Click on your user name to display the User Information Menu. Through this menu, you can change your user profile settings, manage the layout of your Home Screen, access your current Daily Log or create a new log if one doesn't already exist, upload images, and logout of RMS.



For more information on these options, refer to "User Information Menu" on page 43.

#### New Notification Alert

Notifications are used to relay important information to the user. There are automatic system notifications advising the user, depending on his/her role, when a report is submitted for approval, a report is disapproved, evidence is pending check-in, and other similar workflows. A user can also send an ad-hoc notification to another user or group of users.

The new notifications alert appears in the center of the User Ribbon in red. Click on the red notification to open a window listing the notifications.





Click on an item in the list to open the notification.

For more information on notification alerts, refer to "Notifications" on page 23.

## Toggle Night Versus Day Mode

Click on the Night/Day mode icon on the User Ribbon to toggle between the two settings. When Day Mode is active, a sun-like image appears as the icon, and a moon for Night Mode.

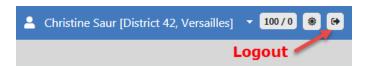




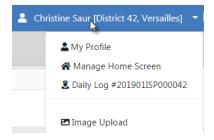
For more information on Night and Day Modes, refer to "Night Versus Day Mode" on page 2.

### Logout

Click the Logout icon on the right of the User Ribbon to sign out of Online RMS and return to the Login window.



Alternatively, you can Logout through the *User Information Menu*. Click on your user name, then click Logout.



After you are logged out of RMS, click the X on the upper right corner to close the browser window.

For more information on the *User Information Menu*, refer to "User Information Menu" on page 43.

#### Recent Activities

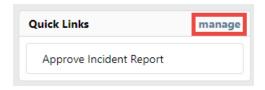
The **Recent Activities** section that appears on the right side of the Home Page allows quick access to edit a user's Incident reports, Cases, Open Field Arrests, Open Forms, Evidence Review, My Court Appearances, Forms for Review, and other areas specific to the logged in user.

### **Quick Links**

**Quick Links** that appear on the side bar of the Home Page allows for quick access to different areas and define processes within Online RMS. You can manage which links you want to see here.

**Note**: Only you, as the user, can manage these links on your Home Page; the administrator cannot choose for you.

Click on the Manage link to add items to the Quick Links area.



Check applicable links in the Internal Links section, then click Save.



### **External Links**

**External Links** that appear on the side bar of the Home Page allow quick access to external sites which open in a new browser. These are made available by your administrator. You can manage which available links you want to see on your Home Page.

**Note**: Only you, as the user, can manage these links on your Home Page; the administrator cannot choose for you.

Click on the Manage link to add items to the Extneral Links area.



Check applicable links in the External Links section, then click Save.



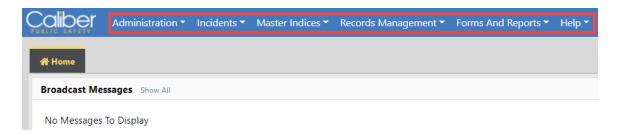
#### Charts

**Charts** allow users with permissions to access to statistical charts and events within Online RMS.

# **Mobile Device Friendly**

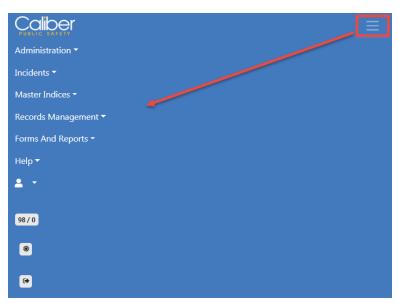
Online RMS content easily adapts to devices of various sizes by leveraging a scalable, responsive web-based design. Online RMS auto-adjusts layout and content according to the screen size, making navigation easy on any mobile device.

On larger screens, drop-down and other menus appear across the top of the screen.

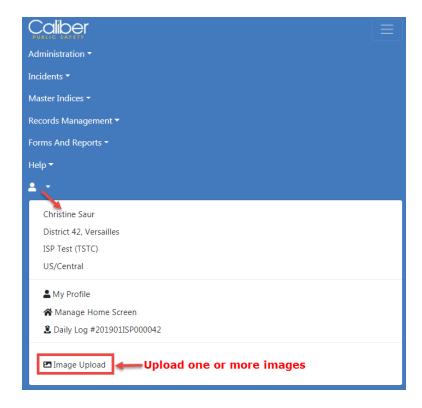


On smaller screens, such as mobile devices, a **Collapsible Menu** appears on the top right. Click on the **Collapsible Menu** to display various drop-down menus on the left of the screen, and click again to close.





Click on various drop-down menus for sub-menus or additional options, and click again to close.



Upload one or more images directly from your mobile device to your personal RMS Image Library. You can then easily import the images from the Image Library into an incident report, field arrest, or master person record. For more information on uploading images to the Image Library, refer to "Image Library" on page 73.

# **Broadcast Messages**

**Broadcast Messages** allows users with appropriate permissions to relay information to other users, with the option to send to specific schemas.

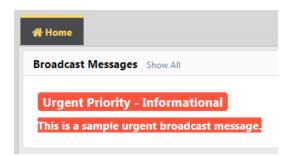
The information can be enforcement related, informational, or administrative in nature. **Broadcast Messages** relay administrative messages to users such as mandatory meeting or firearms qualification notices as well as time sensitive information such as an Attempt to Locate notice for a stolen vehicle or reckless driver.

Each message includes a start and end date/time. . Various message types (informational, web sites, Amber Alerts, warnings, training tips, and so forth) are selected then set with specific priority levels.

Color coded messages improves awareness and recognition of critical and high priority messages.

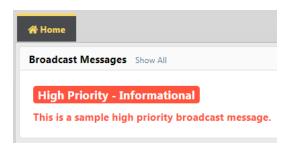
#### **Urgent Priority Message**

Full color coding of the message.



#### **High Priority Message**

Color Coding of high priority message.

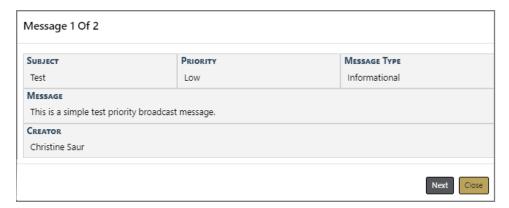


## Medium Priority Message

Color coding of medium priority message.

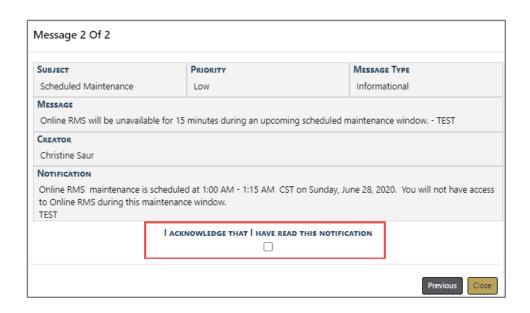


When more than one **Broadcast Message** is in the queue, each message will display for approximately fifteen seconds before transitioning to the next message. This will continue to the last message before starting the sequence again. You can display all messages in the queue by clicking on the message to open the *View Messages* window



Click on the **Next** button to view the next message, if applicable.

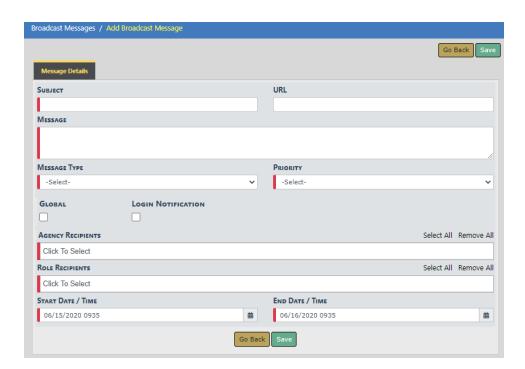
If a message requires acknowledgment, the message appears every time you log in, until you select the **Acknowledgment** checkbox.



## Adding a Broadcast Message

1. Click on the Broadcast Messages tab. Click on the **Add Broadcast Message** button located on the top right above the message grid to open the **Add Message** window.





**Note:** Any field with a red left-hand border is a required field.

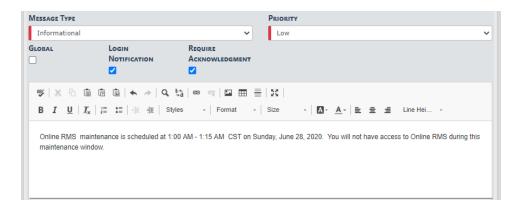
- 2. Enter a Subject.
- 3. Optionally enter a URL.
- 4. Select the **Global** checkbox if you want to send the notification to schemas rather than agency recipients.

**Note:** This option is only available to Caliber Admin users.

a. A **Schemas** field appears. Select one or more Schemas.



5. Select the **Login Notification** checkbox if you want the notification to display to users upon login.



- 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 **Agency Recipients**. Choose one or more listed agency in the agency's schema/workgroup.

Note: If Global is checked, skip this step.

- 7. Select one or more Role Recipients.
- 8. Click Save to create the message, or click Back to return to the Message Center.

# Deleting a Broadcast Message

You and other users within your agency, who are authorized to delete messages, can delete each other's **Broadcast Messages**. For multi-tiered agencies: Users outside of your agency, who are also authorized to delete messages, cannot delete messages created by another agency.

To delete a **Broadcast Message**, click on the Delete icon . If the Delete icon does not exist, then you are not authorized to delete that message.



# **Notifications**

This area presents a grouped list of all **Notifications** for the user. The **Notification Types** can be:

- Information on the status of the user's Incidents or Arrests
- Messages sent to the user by another user or an administrator
  - Alerts from Master Indices subscriptions
  - Alerts from Warrant Logs
  - Alerts from a Public Custom Form submission.
  - Other system notifications based on the user's role

You can view a list of notifications two different ways: New notifications and all active notifications.

#### **New Notifications**

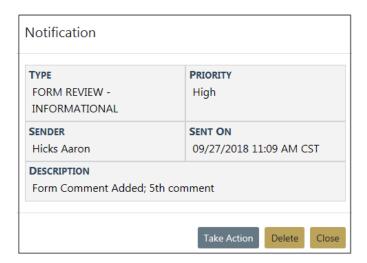
When new notifications arrive, the total number of Notifications near the top right of the screen appear with a red background. The red turns to a white background when the messages have been red as shown in the example.



Click on the notification indicator to view the list of Notifications and Broadcast messages. Click on each tab to view.



Click on a notification link to open the **View Notification** window.



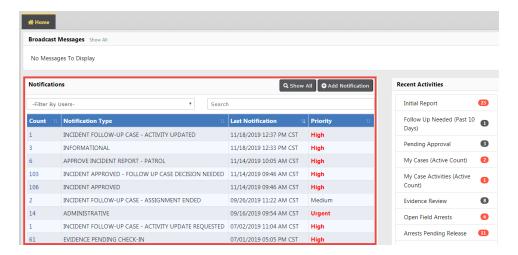
Depending on the type of notification, it can be canceled, replied to, reassigned, deleted, or acted on. The action buttons that appear on the bottom of the window vary by type of notification.

Under the Notifications & Messages grid, click the Clear New button at the bottom of the screen to clear all new notifications.

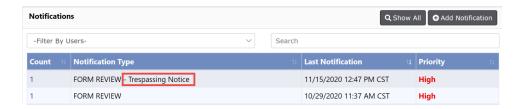
Click Close to close the window.

#### Show All Notifications

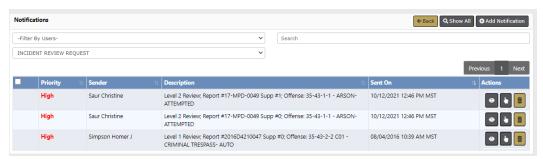
A list of all your notifications are displayed on the **Home** screen in a grid. A maximum number of notifications appear in the grid at one time. The **Count** of each **Notification Type** displays on the left.



**Note:** With Caliber Public Safety version 11.5 and higher, a Notification Type sub-category includes the Custom Form name, if applicable, for improved usability for reviewing Custom Forms submissions and taking action.



To see all Notifications for a particular **Notification Type**, click on the **Count** in the first column of that Notification Type. In the below example, three Incident Review Request records display.



With appropriate permissions, you can click on the hand icon under the Actions column to Take Action.

Enter text into the **Search** box to display only messages that match your entered text.

If you set up **User Groups** then you see the **Filter By Users** option. For more information on **User Groups** refer to your agency administrator.

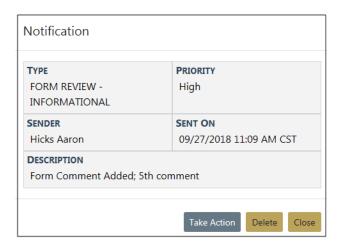


Click the **Show All** button at the top of the grid to display all notifications. Check a box to the left of a notification to display the **Delete Selected** box on the upper right, then confirm deletion when prompted.



Click on any column heading to sort the list by that column. For example, click on the **Type** column heading to sort the list by **Type**.

Click on a notification link in the **Description** column to open the **Notification** window.

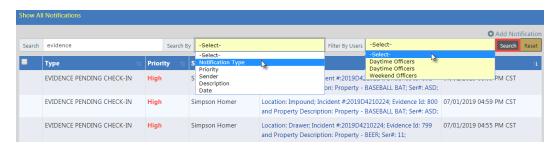


Depending on the type of notification, it can be canceled, replied to, reassigned, deleted, or acted on.

#### Search Notifications

You have the ability to **Search** for specific notifications in the **Show All Notifications** grid by entering text and selecting options from drop-down lists.

Enter text into the **Search** field. Select an option from the **Search By** and **Filter by Users** drop-down lists. Click the **Search** button to apply your search criteria.



Click the **Reset** button to clear the entered Search text.

#### **Delete Notifications**

There are up to four ways to Delete Notifications that have the delete option.

• From the **New Notification** message. Refer to "New Notifications" on page 23.



 From the link in the **Description** column of the **Show All** notifications grid. Refer to "Show All Notifications" on page 25.

Check the box in the **Show all** notifications grid.

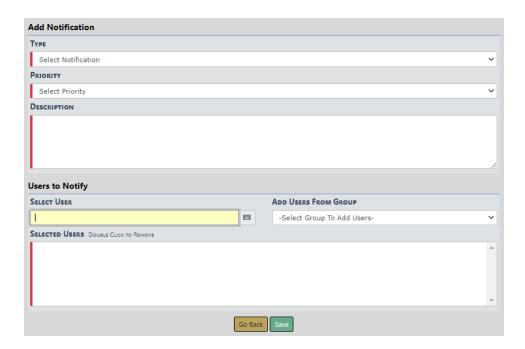
Check the box next to the notification you want to delete, then click **Delete Selected** when the button appears.



- Click on the count number under the Count column in the Notification grid, then click the Delete icon under the Actions column. Refer to "Show All Notifications" on page 25.
- For *view only* informational Notifications:
  - When taking action on a view only information Notification, click on the Take Action & Delete button to take action and delete the notification.

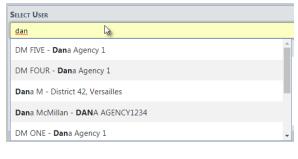
#### **Add Notifications**

User-initiated notifications can be sent by clicking the Add Notification link to display the Add Notification screen.



Select the Type and Priority from the drop-down lists and enter a Description.

In the **Select User** field, begin entering a user's name then choose from the list that appears based on the text you enter. You can choose one or multiple names that are to receive your message. When choosing names, the names appear in the **Selected Users** box. **Double Click** on a name to remove.





Optionally select **Add Users From Group** to add users from a defined group, such as Daytime Officers, Second Shift Officers, etc. Selecting a group adds the users of that group to the list of selected users.

When finished, click the Save button.

# **Entering Dates and Times**

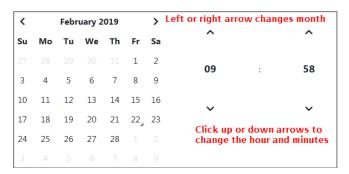
Dates and times can be entered using different methods.

- Type a T in the date field then tab out to return the current date and time.
- Type T-# (# represents the number of days) to return a date/time less than the current month.
  - Example: If today is 03/05/2019, enter **T-1** to return the date 03/04/2019.
- Type **T+#** (# represents the number of days) to return a date/time in to the future.
  - Example: If today is 03/05/2019, enter **T+2** to return the date 03/07/2019.
- Use the Calendar Tool, the icon to the right of the date and time field.

#### Calendar Tool

Throughout Online RMS, date fields have calendar icons on the right that are used to open the **Calendar Tool**. Using the **Calendar Tool** to enter dates into the system ensures that dates are always entered in a consistent format.

Click the calendar icon to open the Calendar Tool.



The calendar defaults to the current month and year and the current day displays a triangle on the bottom right.

13 14 15

Click the **left** or **right arrow** at the top of the window to select the appropriate month and year if it is different than the default, then click on the appropriate **day** to select. Click on the **up** or **down arrows** to select the appropriate time and hour.

# Text Fields, Drop-Downs, Buttons, Check Boxes

The following list provides information about the Text Fields, Drop-Downs, Buttons, and Check Boxes used in Online RMS.

#### **Text Fields**

Type information directly into the field.

**Note**: Some text fields are auto-complete fields, also called AJAX fields. When you place your cursor in an auto-complete field, the field turns yellow and acts as an auto-complete field by offering drop-down choices for selection. If the entry you want is presented, click it to pull it into the field.

**Note**: Some text fields provide spelling auto-correct options. This will appear as a red line under a word that does not appear in the software dictionary. Right-clicking a word or term that has been underlined will cause a dialogue box with suggested corrections to appear.

# **Drop-Down Lists**

Click to the right of a field to display a list, then click a value to select it and pull it into the field.

### **Buttons**

There are different types of buttons: Function Buttons, Radio Buttons, and Floating Buttons.

#### **Function Buttons**

Function buttons are used to initiate system functions. Examples of function buttons include, Quick Print, Print, Exit Report, Transfer, Exit Wizard, and Submit for Approval.

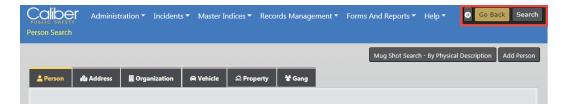
#### Radio Buttons

Only one radio button may be selected from a group (two or more displayed buttons).

Size: O Small Medium Large

## Floating Buttons

Floating action buttons appear on the top right of search pages for easy navigation without scrolling.



Click on the arrow to hide, and click on the arrow again to unhide.



### **Check Boxes**

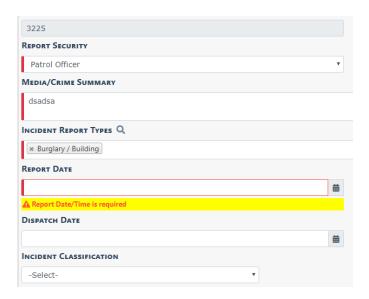
Click the box to select (insert a check mark) or deselect (remove a check mark) to activate or deactivate an option, or to filter a list by one or more parameters.

# **Required Fields**

Any field with a red left-hand border is required.



You must complete required fields to continue. If you do not supply a value in a required field, a descriptive message highlighted in yellow displays directly below the field.



# Column Sorting

Online RMS allows you to sort any displayed column in ascending or descending order wherever data is listed in a columnar format.

For example, **Person Search Results** are in a columnar format. Click on any column heading to sort by ascending order, or click again to sort in descending order. The column you are sorting displays an up or down arrow to the right of the heading, indicating ascending or descending respectively.



## **SmartSearch**

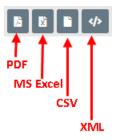
Users can search for incidents across all agencies in the Online RMS system within the user's State, or agencies can choose to share data with other agencies outside of their State. This search adds a simple interface to perform searches the way one would in an Internet search engine, such as Google. The Smart Search link is accessible from the Incidents main screen under the Incident Reporting section.

For details on using Incident Smart Search refer to the Incident "Smart Search" on page 267.

# **Export Search Results**

You have the ability to search data within the different modules of Online RMS, and export the results to various file types. For example, you can search Warrants, Incidents, or data in other modules to view a set of information, then export the search results to Excel or other supported formats.

There are four supported file formats from which to choose. Click on the associated icon to export the list.



- PDF (Printable Document Format)
  - File that contain a captured image of a printed document.
  - The file opens into a new tab in your browser, where you can choose to save as a file on your computer.
- MS Excel
  - Microsoft Excel is an electronic spreadsheet; typically used for storing and calculating data.
  - Gives you the option to open the document or save to a file on your machine.

- Note: Online RMS supports MS Excel export up to 5,000 records.
- CSV (Comma-Separated Values)
  - Files that contain a collection of data in a standard format; typically used for exchanging data between applications that support CSV files.
  - Gives you the option to open the document or save to a file on your machine.
  - Note: Online RMS supports CSV export up to 5,000 records.
- XML (Extensible Markup Language)
  - A plain text file that contains a collection of data with a defined set of structure and storage rules of that data; typically used for websites.
  - Gives you the option to open the document or save to a file on your machine.

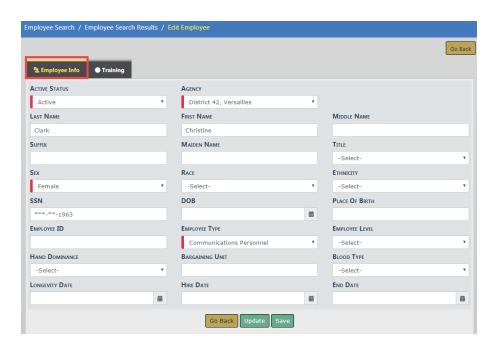
# **Personnel Management**

The **Personnel Management** module of Online RMS allows agency administrators to manage employee information, whether or not the employees are Online RMS users. Only administrators with the appropriate permissions can see and access this module.

There is one Master Employee record per person with information grouped into two tabs:

#### Employee Info

The Employee Info tab contains Employee Name, SSN, DOB, Medical Info, Driver License Number, Hire Date, Addresses, Service History, Education, Languages, Skills, Medial Info, Photos, Documents, and other information. Sensitive information such as SSN is masked with asterisks and encrypted in the database for security purposes.



The Employee record opens to the Employee Info tab by default.

**Note:** Sensitive information such as SSN is masked with asterisks and encrypted in the database for security purposes.

#### Training

The *Training* tab contains training courses, certifications, and eligible ranks for that employee.



For more information refer your agency administrator or reference the *Personnel Management* chapter of the *Online RMS Administrative Guide*.

# **Printing from Online RMS**

You can print Online RMS content wherever you see a print icon or a print button:

Print Icon:

Print Button:



Clicking on the icon or button generates a PDF document in a new tab in the browser keeping the current Online RMS page open. A separate tab also allows you to view the PDF before you decide whether you want to save it with a custom filename, print it, or both. If you do not want to save the PDF, simply close the tab.

**Note:** Internet Explorer does not support custom filenames. If you are using Internet Explorer, the filename defaults to the name of the current page's name (i.e., PersonAction, IncidentPrint). After saving the PDF, you can rename the file if you wish.

# Chapter 2. Navigation Icons

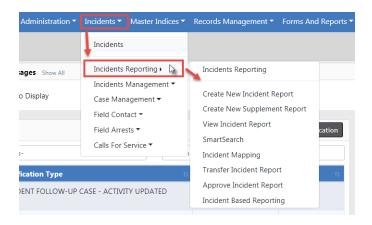
### **Home Button**

Click on the Caliber logo in the upper left corner of the window to return to your **Home Screen**, regardless of what area of the application in which you are working.

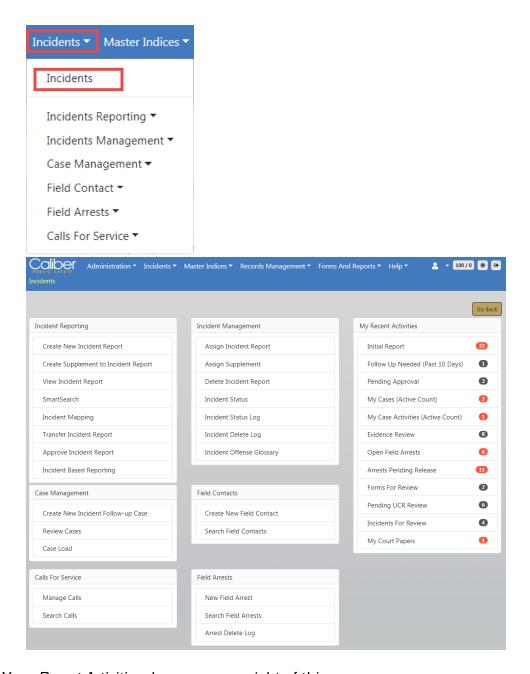


## **Incidents Button**

The **Incidents** button is located on the navigation bar at the top of the Online RMS window. The down arrow on the right of the button indicates additional menu options are available. Click on the **Incidents** button to display menu options. There could be multiple layers of menu options. The menu options vary by agency and permissions.



Alternatively, click on the top menu option to display the full menu on one screen instead of navigating through the multiple drop-down menus.



Your Recent Activities also appear on right of this screen.

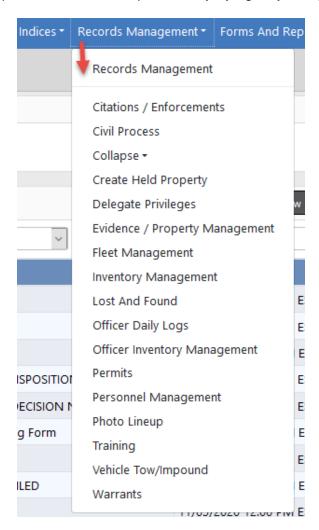
## **Master Indices Button**

The **Master Indices** button is located on the navigation bar at the top of the Online RMS window. The down arrow on the right of the button indicates additional menu options are available. Click on the **Master Incides** button to display menu options. For

more information, see "Master Indices" on page 81. The menu options vary by agency and permissions.

## **Records Management Button**

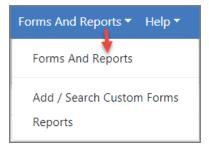
The **Records Management** button is located on the navigation bar at the top of the Online RMS window. The down arrow on the right of the button indicates additional menu options are available. Click on the **Records Management** button to display menu options. The menu options vary by agency and permissions.



# Forms And Reports Button

The **Forms and Reports** button is located on the navigation bar at the top of the Online RMS window. The down arrow on the right of the button indicates additional menu options are available. Click on the **Forms and Reports** button to display menu options. This area allows you, with appropriate permissions, to search completed forms or run statistical reports.

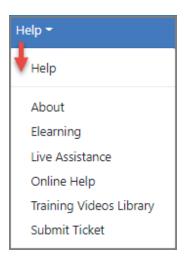
The menu options vary by agency and permissions.



For more information on *Custom Forms* and how to search for and view them, refer to "Custom Forms" on page 63.

# **Help Options**

Click Help to display a drop-down menu. The menu options vary by agency and permissions.



#### **About**

This section provides information about the application version being used, information about the user's computer including the operating system and browser, and information about the server being accessed.

#### **ELearning**

All users can access short training classes 24 hours a day for different modules within the Online RMS. The classes contain step-by-step instructional videos and offer assessment exams.

#### Live Assistance

This is a support tool prompted by our Support Team. It is used to view your computer screen and even take control of your mouse and keypad to assist with support issues. This is only available when prompted by an Caliber Support Team member and is not available otherwise.

#### Online Help

All users have access to this self-help option 24 hours a day. This area contains the Online RMS Knowledge Base, which contains information for all areas within RMS.

#### **Training Videos Library**

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 videobased learning to all users where agencies use and enable this feature.

#### Submit Ticket

All users have the ability to submit a ticket to our Support Team 24 hours a day. Support tickets will be responded to by the Support Team within one business day, during regular business hours (ET). For more urgent issues please call 800.274.2911.

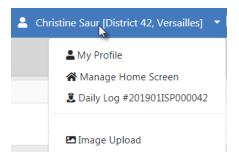
If configured, users with Team Support website access can automatically sign into the Team Support website from within Online RMS.

For more information on submitting tickets, refer to "Submit Ticket" on page 61.

## **User Information Menu**

Click on your user name to display menu options. The drop-down contains *My Profile*, *Manage Home Screen*, *Current Daily Log* (or the option to create a new log if one does not

already exist), and Image Upload.



### My Profile

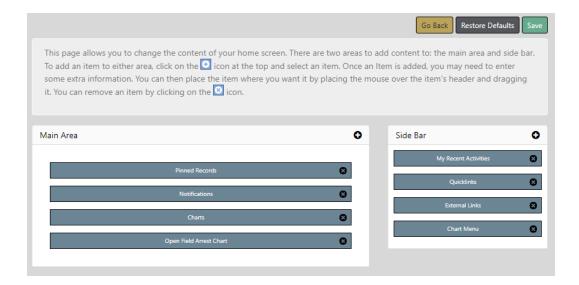
**My Profile** is a page that contains an organized set of links to various user settings and functions.



For more information, refer to "My Profile Overview" on page 49.

## Manage Home Page

You can customize your *Main Area* and *Side Bar* items by dragging and dropping the order in which they appear or omit items from showing on your home page, or click the add icon to add items. Follow the directions displayed near the top of the window to customize the screen.



Click **Save** when you are finished making changes, click **Restore Defaults** to reset your changes back to the default settings, or click **Go Back** to return to the **Home Page**.

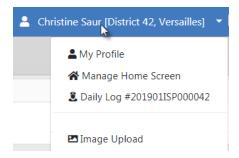


For more information on accessing the **Home Page** refer to "Home Page " on page 8.

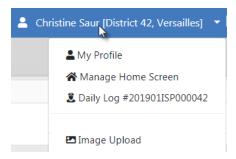
## **Daily Log**

You can access your current Daily Log or create a new log if one doesn't already exist.

If a Daily Log has not yet been created, [New Daily Log] appears in the drop-down list. Click on that option to create a new log.



An existing Daily Log will appear in the drop-down list with a log number. Click on that option to open the existing log.

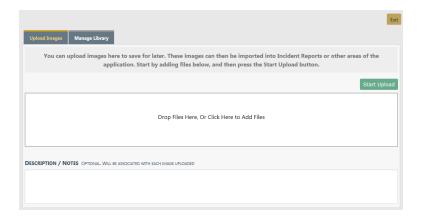


For more information on the Daily Log, refer to "Officer Daily Log" on page 521.

### **Image Upload**

You can upload images directly from your mobile device or other devices into your personal RMS Image Library, then import later into Incidents Reports, Field Arrests, and other areas of Online RMS.

Click on the Image Upload option to open the upload utility.

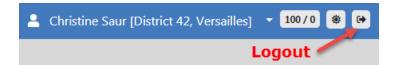


For more information on uploading images to your personal RMS Image Library, refer to "Image Library" on page 73.

## Logout

The Logout option signs you out of Online RMS and returns you to the Login window.

Another option is to click the Logout icon on the right of the User Ribbon.



Once logged out, click the X on the upper right corner of the window to close.

# Chapter 3. My Profile

# My Profile Overview

**My Profile** is a page that contains an organized set of links to various settings and functions specific to each user, such as user profile information, preferences, subscriptions, officer information, change password and security questions links, and more.



A photo of the person could also be shown, if available.

**Note**: By default, users cannot update their profiles, Officer Information, or Employee Information unless they have been granted permissions to do so.

## **Access My Profile**

To access **My Profile**, click your name on the upper right of the window, then select My Profile.



## My Profile Page Layout

My Profile contains three sections on the left sidebar of the window:



#### 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.

#### User Quick Links

Links for quick access to specific functions, such as change password, change security questions, change home agency, and create assignment.

#### **Change Password**

Use this link to change your password while logged into Online RMS. When prompted, enter your new password, re-enter to confirm, then click the **Change Password** button, or click **Reset Via E-Mail** to have a temporary password emailed to you.

If you have forgotten your password, you can reset it from the Online RMS Login page. For more information, refer to "Resetting Online RMS Password" on page C.

#### **Change Security Questions**

Use this link to change your security questions. You can change one, two, or all three questions and answers. Click **Save**.

#### Change Home Agency

Use this link to change your home agency, if applicable. Select the agency from the drop-down list then click **Save**.

#### **Create Assignment**

Use this link to create an assignment, if applicable.

Select the assignment from the drop-down list, select a start date, select end date, if applicable, deselect Active if you do not want to enable the setting at this time, then click **Save**.

#### Go To

These are tabs to other user settings, such as profile information, preferences, external searches, subscriptions, officer information, and account history.

The tabs are based on permissions and may vary by user.

Click a tab to display 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 My Profile.

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.



**Note**: Your agency administrator can update, add, enable or disable Jurisdictions for users. For more information on jurisdictions, refer to the *Caliber Public Safety Online RMS Administrator Guide*, or refer to your agency administrator.

#### Refer to the following for tab details:

"Profile Information Tab" on the facing page

"Preferences Tab" on the facing page

"External Searches Tab" on page 55

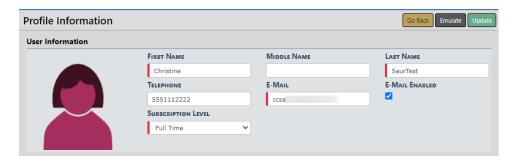
"Subscriptions Tab" on page 56

"Officer Information Tab" on page 57

"Account History Tab" on page 59

#### **Profile Information Tab**

Your Name, Telephone, and Email Address exists with an option to enable the email to receive notifications from the system.



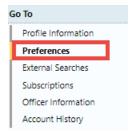
Make any necessary changes then click the **Update** button to save changes.

#### **Preferences Tab**

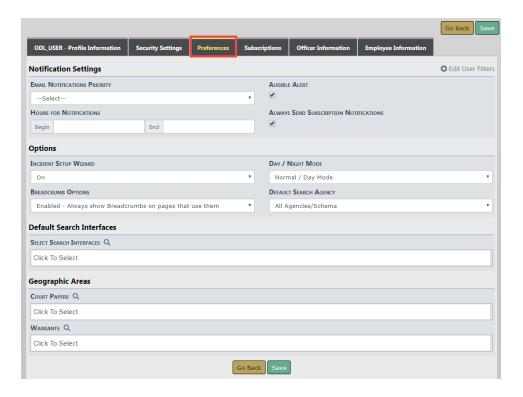
Use this tab to set notification preferences. You can enable or disable the audible alert, set email notification priority preferences, enable or disable Incident Setup Wizard, enable or disable Breadcrumb Options, set Day or Night Mode, set the Default Search Agency and Interfaces, identify Geographical Areas for court papers and warrants, and manage User Filters.

You can update your preferences from My Profile.

- 1. Access My Profile page. For instructions, refer to "My Profile Overview" on page 49.
- 2. Click Preferences under the Go To section.

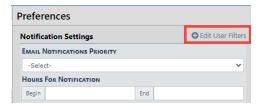


3. Preferences opens.



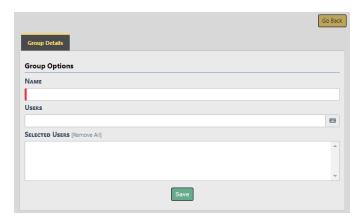
- 4. Complete the form as needed.
- 5. With proper permissions, you can optionally click the **Edit User Filters** link to include or exclude yourself in or from user groups.

For example, a supervisor can define a user group to filter notifications by daytime and weekend officers.





a. Optionally, click the **Add Group** button to create a new group.



Enter a unique Name, select Users, then click Save.

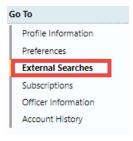
- b. Optionally, click on the edit icon to edit an existing group.
- c. Optionally, click on the trash icon in to delete an existing group.

#### **External Searches Tab**

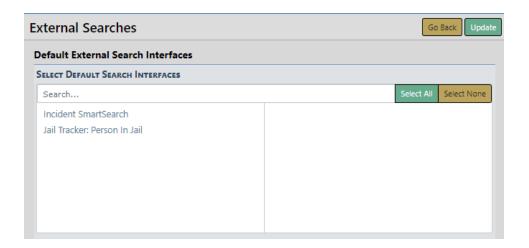
Caliber Public Safety Online RMS allows users to set their default external search interfaces.

You can access your external searches from My Profile.

- 1. Access My Profile page. For instructions, refer to "My Profile Overview" on page 49.
- 2. Click External Searches under the Go To section.

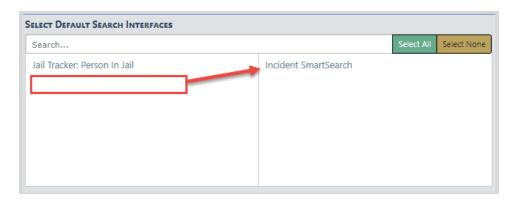


3. External Searches opens.



The available search interfaces appear on the left.

- 4. Two search interfaces are shown for illustration purposes. If many are listed, then you could **search** for a particular interface rather than page down to look through a long list.
- 5. Click on an interface in the list to **select**. The selected interface moves to the right side of the window.



Select as many available interfaces as you wish.

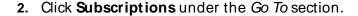
To **deselect**, click on an interface on the right and it moves back to the available column on the left.

6. Click the **Update** button to save.

## **Subscriptions Tab**

You can update or delete your existing subscriptions from My Profile.

1. Access My Profile page. For instructions, refer to "My Profile Overview" on page 49.







Note: The **Emulate** button appears only for users with proper permissions.

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

You can **Subscribe** to existing master index records (person, address, vehicle, etc.) to receive notification when someone views, updates or associates records to which you have interest.

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

For more information on creating a **Subscription**, refer to "Subscribe to Master Records" on page 132.

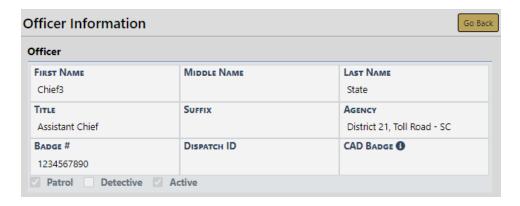
#### Officer Information Tab

You can view your officer record from the My Profile page.

- 1. Access My Profile page. For instructions, refer to "My Profile Overview" on page 49.
- 2. Click Officer Information under the Go To section.



3. Officer Information opens.



This form is read-only. Refer to your agency administrator for necessary updates or questions.

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



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

Hover your mouse over the CAD Badge blue information bubble of 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.

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

### **Account History Tab**

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

You can view your account history from My Profile.

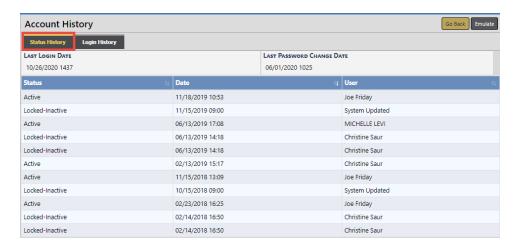
- 1. Access My Profile page. For instructions, refer to "My Profile Overview" on page 49.
- 2. Click Account History under the Go To section.

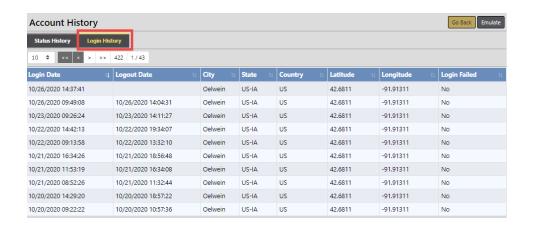


3. Account History opens as read-only.

There are two tabs: Status History and Login History.

The Status History tab opens by default.





# Chapter 4. Submit Ticket

## **Submit Ticket Overview**

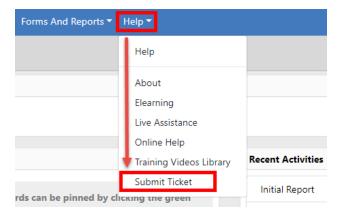
All users can submit a support ticket to our Support Team 24 hours a day from within Online RMS. How you submit a ticket depends on your permissions and agency setup:

- Enter your feedback onto an Online RMS Support form and submit.
- Automatically log into the Team Support website from within Online RMS and submit a ticket there.

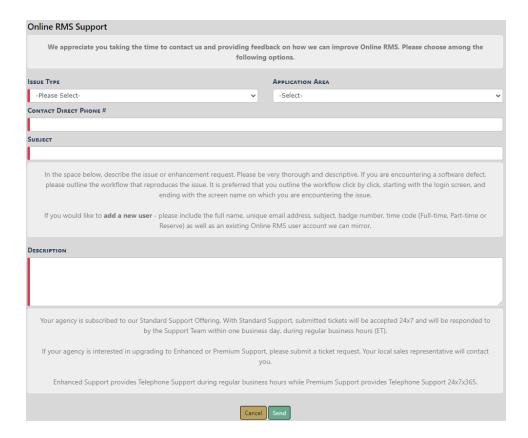
For more information on which option you are setup to use, refer to your agency administrator.

## How To Submit a Ticket

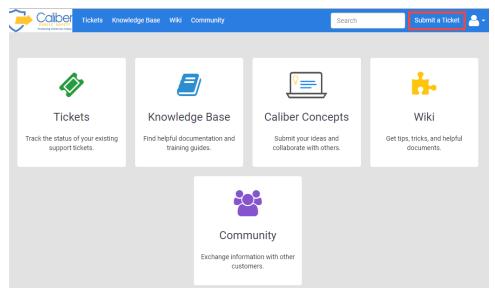
1. Click Help on the top menu bar, then Submit Ticket.



- 2. Follow one of the options below:
  - a. If your account is not configured to log into the Team Support website automatically, a pop-up *Online RMS Support* window opens.



- Complete the form then click Send.
- b. If your account is configured to log you into the Team Support website automatically, Team Support opens in a separate window.



- Click Submit a Ticket and follow the Team Support ticket procedure.
- **Sign Out** and close the window when finished.

# Chapter 5. Custom Forms

### **Custom Forms Overview**

The Custom Forms feature must be enabled by Caliber Public Safety personnel. Only administrative users who have been assigned the appropriate role with the custom forms privileges can create or update custom forms, and only users who have been assigned roles with the custom forms privileges can use or search for the forms.

**Routing** for available Custom Forms notifies Online RMS users when a new submission occurs. The same review process is used for both public and non-public forms. To take action on the notification, you must have permissions to create an incident from a form.

Online RMS 11.3.2 and above supports **Community Reporting** of minor crimes, tips, and other police-related events that leverage the power of Online RMS*Qustom Forms*.

For more information on **Community Reporting**, or public forms, refer to "Community Reporting" on page 287.

There are two ways to take action on submitted forms:

- From a Notification.
- From your Recent Activities.

For more information on taking action, refer to "Taking Action on Submitted Forms" on page 288.

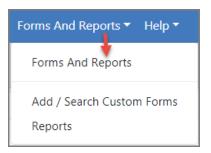
The same method is used for searching and viewing public and non-public Custom Forms. For more information, refer to "Search For and View Custom Forms" on page 63.

## Search For and View Custom Forms

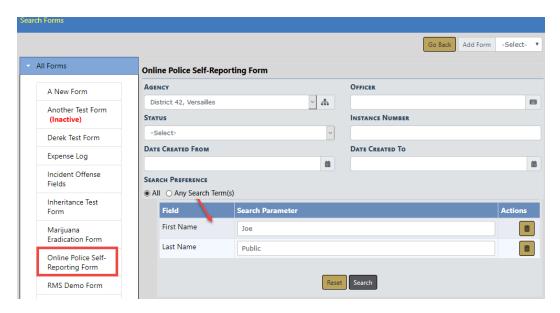
To search for and view Custom Forms follow these steps:

**Note:** Searching for and viewing a publicly available custom form is the same as searching for a non-publicly available custom form.

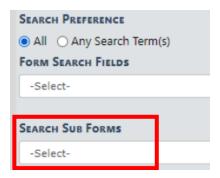
1. Click on Forms and Report on the top menu.



- 2. Click on the Add/Search Custom Forms option.
- 3. Enter the search criteria using the fields provided. Click into the **Form Search Fields** to select Custom Form fields, and repeat to select multiple fields as shown below.



If the form contains sub forms, an additional **Search Sub Forms** option also displays:



4. Click the **Search** button to display the Custom Forms results that match your search criteria.



- 5. Click the **View icon** to view the form.
- 6. Click the **Print Form** button to select print options, then click **Print** to open the form in a new tab in your browser. You can then download to a file or print directly to the printer.
- 7. With appropriate permissions, you can click the **Change Status** button to open the form for edit. Once opened, the creator of the form will have access to edit the form.

For more information on adding and managing Custom Forms, refer to the *Caliber Online RMS Admin Guide*, or your agency administrator.

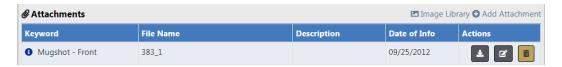
If you receive a *Form Review Notification*, refer to "Taking Action via Notifications" on page 288 or "Taking Action via Recent Activities" on page 296 for more information. Refer to "Notifications" on page 23 for more information on Notifications.

# Chapter 6. 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.



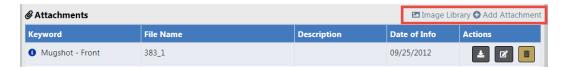
You can edit and delete attachments that were created by you. Users with administrator privileges have the ability to edit and delete attachments for any user.

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, refer to "Image Library" on page 73.



## **Add Attachments**

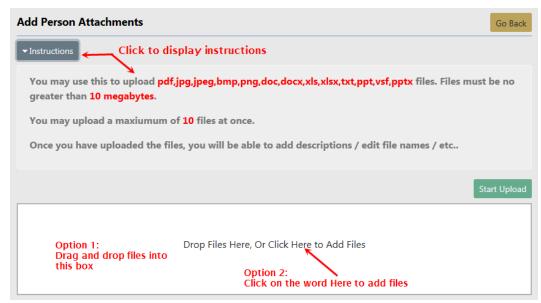
Several Online RMS modules support **Attachments**. Access the module and record that contains the **Attachment** you need to add. For example, to add an Attachment tied to a person, go to that person record and page down to the **Attachment** section, then follow the directions below.



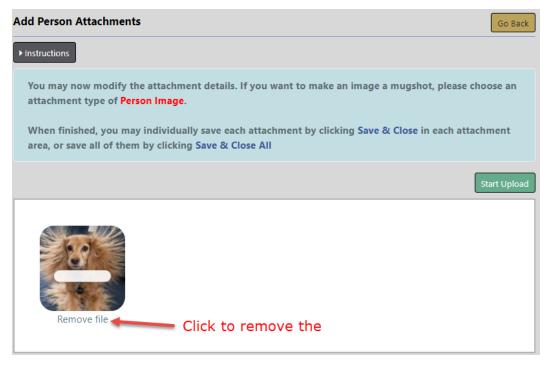
1. Click on the Add Attachment link to begin the upload process.

**Note**: 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.

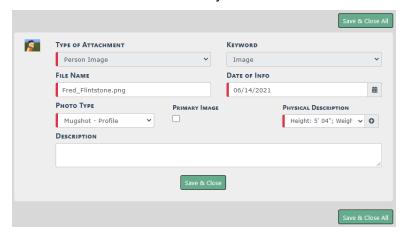


b. When all the files are in the **Queue**, click **Start Upload** button to add the attachments. Click on **Remove File** to remove from the Queue.



**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. The content of this window can vary.



- 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 of data can be uploaded at one time.

## **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.

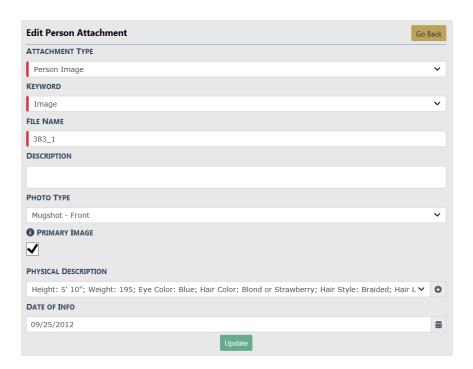
1. Click the edit **icon** on the record you need to update.



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.



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

## **Delete Attachments**

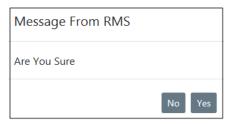
Several Online RMS modules support **Attachments**. Access the module and record that contains the **Attachment** you need to delete. For example, to delete an **Attachment** tied to a person, go to that record and page down to the **Attachment** section, then follow the directions below.

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



Note: You cannot delete attachments created by another user. If an attachment is archived externally, deleting the attachment deletes the external archive.

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.



2. The file downloads to your local machine. Double-click on the file to open.

# **Chapter 7. Image Library**

# **Image Library Overview**

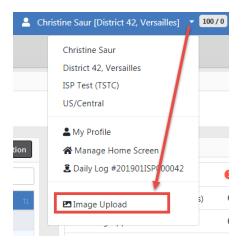
The **Image Library** is a personal RMS image library that contains images uploaded by you from a mobile device or other devices. Only your user account has access to these personal images.

You can then easily import images from your Image Library into incident reports, field arrests, and master person records.

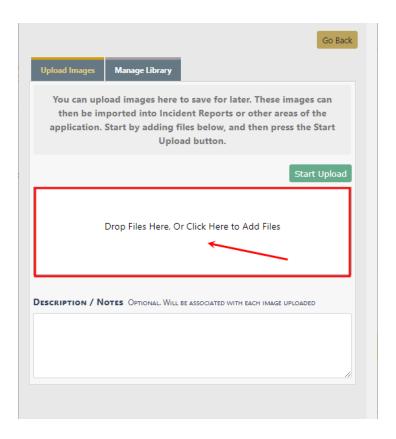
## **Upload Image**

You can upload images to your Image Library from your computer or directly from your mobile device.

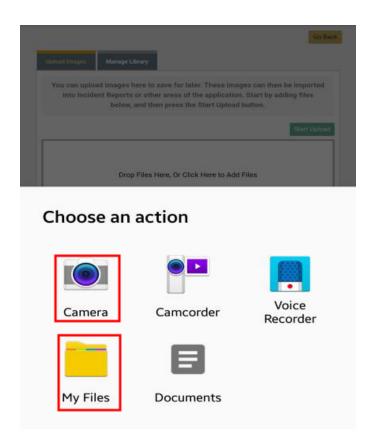
1. Click the down arrow next to your user name on the top right of the window, then click **Image Upload**.



2. Drag and Drop files into the box, or click Add Files.



a. If uploading from your *mobile device*, select **Camera** to take a photo and upload directly from the camera on your mobile device, or select **My Files** (or local folder) to upload from device storage.



**Note**: Only images are supported from the Image Uploader at this time. Video support coming in a future release that requires a subscription to large file storage option.

3. Click Start Upload.



4. Click Go Back when the upload finishes.

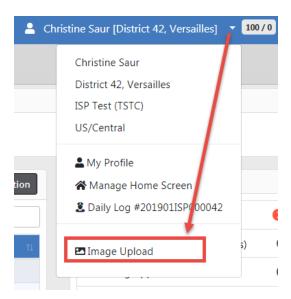
You can delete or download images that exist in your Image Library. For more information, refer to "Manage Library " below.

You can also attach library images to incidents, arrests, and master person records.

## **Manage Library**

You can delete or download images from your personal RMS Image Library.

1. Click on the **down arrow** next to your user name on the top right of the window, then click **Image Upload**.



2. Click on the Manage Library tab to access your uploaded image files.

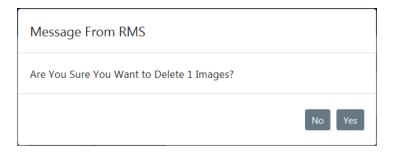


## **Delete Image Files**

1. Click on the **Manage Library** tab to access your uploaded image files, then select the image files you want to delete.



2. Click the Delete Selected Images button, then click Yes to confirm.



**Note**: You can also delete uploaded images after you import them into an incident, fields arrest, or person record. For more information, refer to "Import Images From Library" below.

### **Download Image Files**

1. Click on the **Manage Library** tab to access your uploaded image files, then select the image files you want to download.

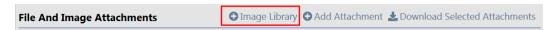


2. Click the Download Selected Images button, then click Open or Save the files.

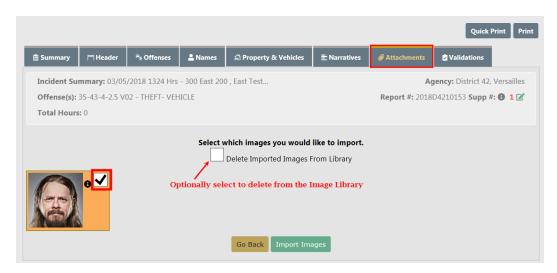
## **Import Images From Library**

You can import image files from your Image Library into incidents, field arrests, and person records with permissions.

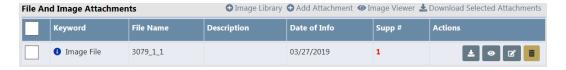
1. Click on the **Image Library** link under *File and Image Attachments* section. Incidents is used in this example; however, the same general process applies to field arrests and persons.



2. Select one or more images you want to import. You also have the option to delete the selected images from the Image Library.



3. Click the **Import Images** button at the bottom of the page. The image file then appears under *File and Image Attachments*.



# Chapter 8. Master Indices

### **Master Indices Overview**

**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, an address, a vehicle, etc. For example, all modules of Online RMS access the same person information for Joe Smith with SSN 123-12-1234 and the same vehicle information for VIN ABC1235223DE45455.

The following are considered **Master Indices**:

#### Person

The **Master Person Index** stores identifying information for persons. Composite sketches and unlimited number of images can be attached, and person records can be linked to appropriate incident, arrests, and other system modules.

Note: If configured for your agency, you can take photos directly from the Online RMS Field Arrest or Master Person Index record using the Hunter Camera integration software installed on your local machine. The software associates the images with the Master Person Index record. For more information on the camera software, refer to "Hunter Camera" on page 818.

When a person is associated with an active warrant, an automatic Caution Flag appears on the master person index record:



For more information on active warrants, refer to "Activate Warrant" on page 584.

While viewing or editing a person record, you can *Pin* it to your Home Page for quick reference.

To *Pin*, click on the green **Pin Person** button located on the top left of the page; the button color then changes from green to gold and the label changes to **Unpin Person**.



To *unpin*, click on the gold **Unpin Person** button.

For more information on pinned records that appear on the Home Page, refer to "Home Page " on page 8.

#### Address

The **Master Address Index** stores address information. If a geo-file is available, the address can be validated and geo-coded (latitude and longitude values included).

#### Organization

The **Master Organization Index** stores information about the organizations with which the department comes into contact. Each organization in the index can have multiple emergency contacts associated with it and link to incidents, patrols, security alarms, standard operating procedures, and other system modules.

#### Vehicle

The **Master Vehicle Index** tracks a vehicle's history with the department and has the ability to link a vehicle to incidents, name, businesses, stolen vehicle history, citations, evidence, and other system modules.

#### Property

The **Master Property Index** tracks stolen, lost, and recovered property. It also stores descriptive information including property disposition and associated incident and person data. Media files and documents can attach to the Master Property Index record. Property data easily transfers to evidence, and property owner information resides in the Master Person Index.

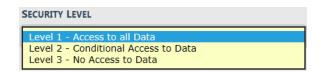
#### Gang

The **Master Gang Index** stores information about street gangs with which the department comes into contact.

## **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**.

6 December 2022 User Guide 83

- And, Not see master indices records that have Security Level 3.
- The default level for all new user accounts.

#### Level 2

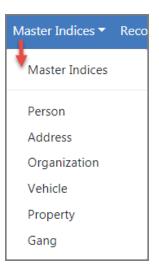
- View the full details for master indices records having Security Level 1.
- View the details for master indices records having Security Level 2.
- And, Not see master indices records that have **Security Level 3**.

#### 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.

## **Accessing Master Indices**

**Master Indices** are accessible, with appropriate permissions, by selecting the **Master Indices** button on the top navigation bar. The down arrow on the right of the button indicates additional menu options are available. Click on the **Master Indices** button to display menu options.



Each Index on the list contains additional information that pertain to that Index. For example, *Person* includes gender, race, date of birth, hair and eye color, ethnicity, etc.; *Vehicle* includes the vehicle model, color, VIN, etc.

You can update and print **Master Indices** records. Beginning with the Online RMS 11.6 release, you can delete Person records with appropriate permissions. **Master Indices** records also provide Total Involvements of the record within Online RMS, Common Event Associations, and the ability to create a Subscription that notifies you when a particular record is accessed, updated, and/or associated to a module within RMS. You can also use **SmartSearch** in the person section for locating person involvement in incidents across all counties in the Online RMS system within your agency's state.

The standard configuration imposes a 100 hour edit lock rule for all Master Indices. This means that the user adding the initial primary information has up to 100 hours to fix any errors but it cannot be edited by another user. Examples of primary information include an incorrect date of birth, social security number, street spelling, vehicle year, VIN, organization spelling, and gang spelling. You cannot edit primary information after 100 hours unless your administrator has given you access to do so, but you can add additional information at any time.

**Note:** The exceptions to this rule are Sex, Race, and Ethnicity. Updates to these fields are allowed if the previously selected value was *Unknown*, and your administrator has given you the *Master Indices - Add Missing Person Info Past Lock Hours* permission. Refer to your administrator for more information.

To access a particular master record, you must first search for the record. A *Search* window appears when you click on any one the of menu items. Search for a particular record, or groups of records, to narrow the search results, then select the record from the list. You can also export the search results to a file. For more information on searching, refer to "Searching Master Records" below.

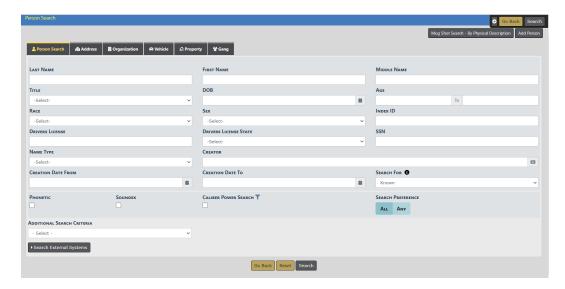
## Searching Master Records

You can search any of the **Master Indices** at any time. Generally, searches are done to identify existing records when creating an Incident report or using another module within the application. If the record already exists, copy the information directly into the Incident report or other module. It is highly recommended you review the existing information prior to using it. This will give you the opportunity to update or add additional information if it is available. If an existing record is not available, you can, with proper permissions, create the master record directly from the module in which you are working.

**Note**: You can search and view Master Person or Vehicle records that were created on specific dates or by specific users.

Master Indices are accessible, with appropriate permissions, by selecting the Master Indices button on the top navigation bar. For more information on accessing the Master Indices button, refer to "Accessing Master Indices" on page 84.

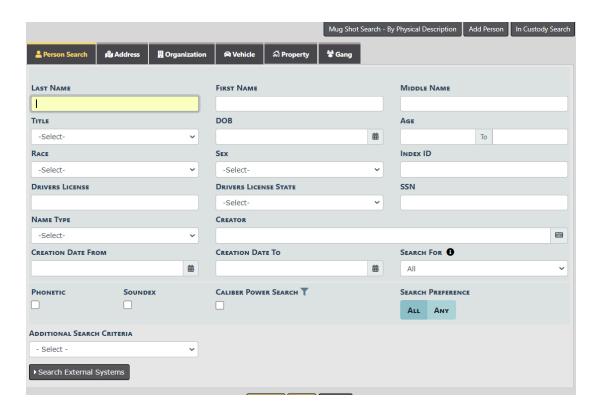
A Search window appears when you click on any one the of menu items. Each menu item considered a tab in the Search window. Choosing Master Indices or Person takes you to the Person tab of the Search window, choosing Address takes you to the Address tab, choosing Vehicle takes you to the Vehicle tab, etc.



**Note**: Person and Address search instructions are provided, though the same general process is also used when searching for Organization, Vehicle, Property, and Gang.

#### Person Search

A search can be done with full or partial text in any of the fields provided. You may also choose to filter results to include **Known**, **Unknown**, or **All** (both Known and Unknown) persons. Searching with less information yields more results. If too many results display, you can click on the **Refine Search** button on the top right of the *Search Results* window to add or change your search criteria.



Click the **In Custody Search** button to search for persons who are in custody. (This button will only be visible if custody records are synced to RMS.)



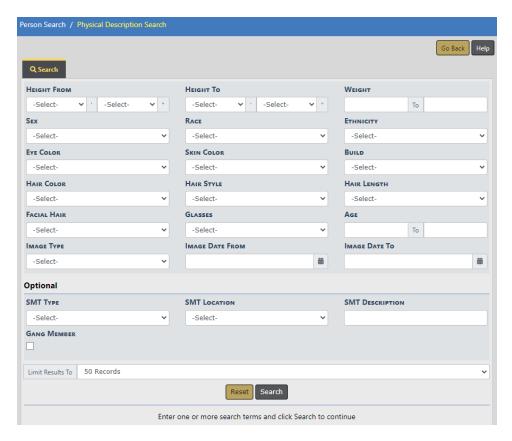
When custody records are synced to RMS and a person search returns a person who is in custody, an alert dialog will display. In-custody results allow you to edit the person (if there is a master person record) or create a master person record for the in-custody person if no such record exists.





### Search Mug Shots By Physical Description

Optionally, click the **Mug Shot Search - By Physical Description** button to display the *Physical Description Search* window.

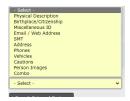


Enter or select one or more search criteria, then click **Search** to display a mug shot photos that match your search criteria.

Optionally, click the **Help** button for tips and guidance on this Search window.

#### Additional Search Criteria

You can also include **Additional Search Criteria** if configured for your agency.



**Note**: Choose **Cautions** from the **Additional Search Criteria** drop down to search person records by Caution Code.

**Note**: Choose **Person Images** to search images by photo type (mugshots, etc.) and by date range.

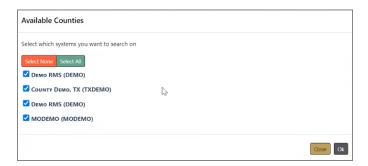
**Note**: Choose Combo to search by a combination of fields such as, physical description, miscellaneous IDs, address, phone, vehicle, caution codes, and person images.

#### Power Search

You can conduct a **Power Search** across other counties, if configured for your agency.

Check the **Caliber Power Search** box, then click on the **funnel T** to choose which counties you would like to include in your search.





The list of available counties varies by agency.

#### Search Results

Every master record will be assigned an Index ID number by Online RMS when it is created. Click on the **Index ID** or the **Last Name** in the *Search Results* window to open the

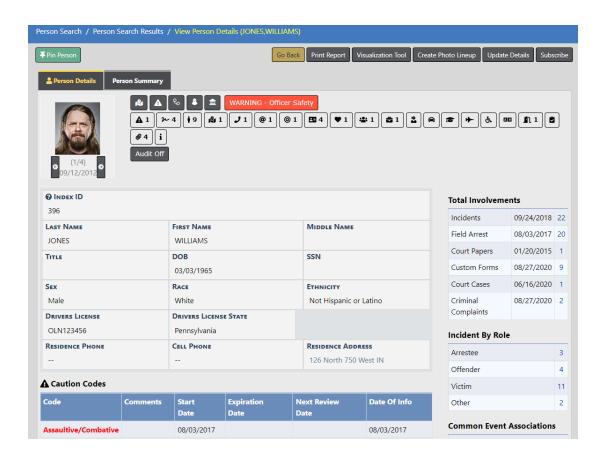
View Person Details window to view a specific record. Select the edit icon on the Search Results page to update a record.

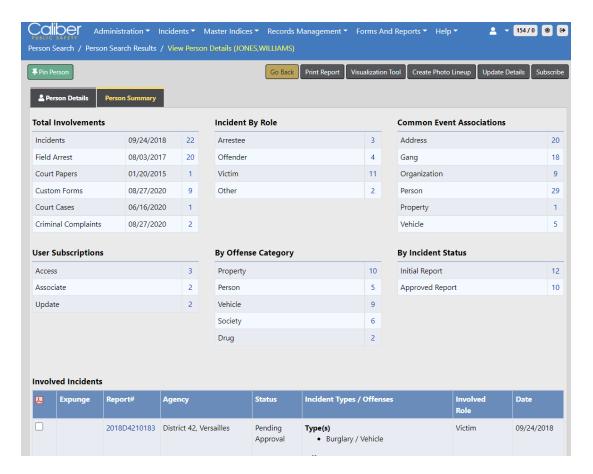


#### View Person Details

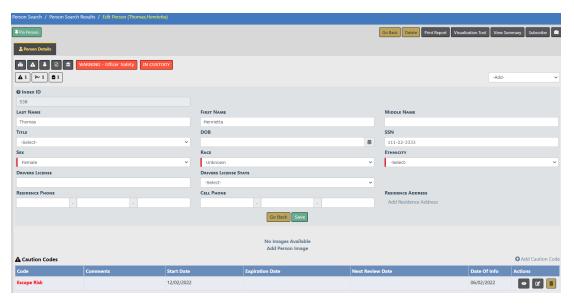
*Mew Person Details* contains two tabs with additional information about that index record, and on the right side of the screen is a summary of all associations to the master index record. Next to each association is a total count hyperlink. Click on the total count hyperlink to go directly to that list under the Summary tab.

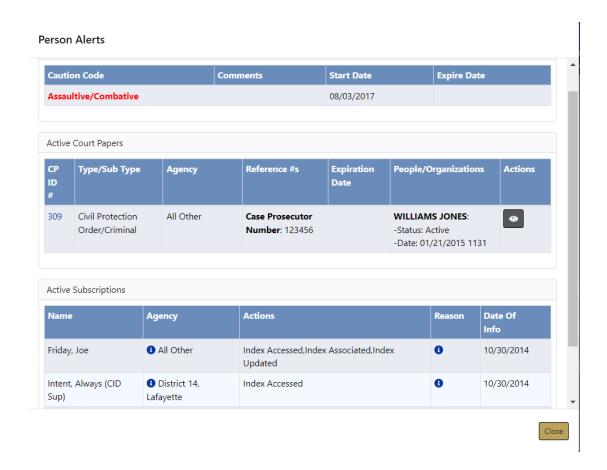
**Note**: Select the **Update Details** button on the top right to switch to Update mode.





If the person searched has an active warrant, court paper, caution code, or permit the officer safety icon will appear, and if the person is a juvenile, the juvenile offender icon will appear. If your system is integrated with jail tracking, in custody flags will also appear. The Officer Safety codes provide a variety of information regarding cautions and other information.





Chapter 8. Master Indices

While viewing or editing a person record, you can *Pin* it to your Home Page for quick reference.

To *Pin*, click on the green **Pin Person** button located on the top left of the page; the button color then changes from green to gold and the label changes to **Unpin Person**.



To *unpin*, click on the gold **Unpin Person** button.

For more information on pinned records that appear on the Home Page, refer to "Home Page " on page 8.

#### **Master Index Associations**

The Summary tab also summarizes the associations on the top portion of the tab. Click on the total count hyperlink to go directly to a list of those records.

Click on the **Residence Address** link to access the address record.



The address record integrates with **Google Maps** when a latitude and longitude are associated with the address, displaying the address location on the map.



Click on the **View Incidents In This Area** button to view closet incidents on the map.

View Incidents In This Area

Click on the **Print Report** button to print the master person record. For details, refer to "Print Master Person Records" on page 129.

If you search the **Master Indices** from within a module (Incident Report, for example), a select icon appears that allows you to select and use the record easily. It is highly recommended you review the existing information prior to using it. This gives you the opportunity to update or add additional information if it is available.

#### Person Active Alerts

A red Alert Icon, that appears next to the person's name in the Person Search Results window, indicates there are Active Alerts on that person. 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.



A blue *Information Bubble*, that appears to the left of the person's name, indicates a photo exists on that person's record. Hover your mouse over the bubble to view the image.



There are various types of **Person Alerts**: Active Cautions, Active Warrants, Active Court Papers, Juvenile, In Custody, etc.

If the person is a juvenile, an alert displays in red.

Agency administrators with appropriate permissions can create custom 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.

Refer to your agency administrator or *Online RMS Administration Guide* for details on administering Caution Codes.

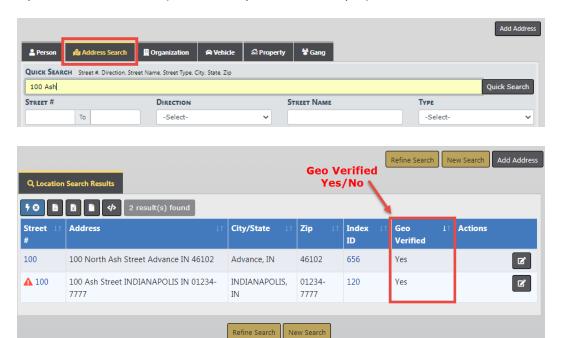
#### View Mobile Person Results in Online RMS

For agencies using both *Caliber Mobile* and *Online RMS*, person results that exist in *Caliber Mobile* within the last 24 hours are accessible on the Master Index Search page in *Online RMS* by a **Mobile Results Available** link prefixed by the number of results found.

Click on the Mobile Results Available link to display the Mobile Results.

#### Address Search

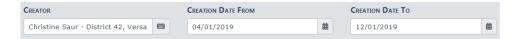
The **Quick Search** returns addresses that match every typed word in the field. For example, 100 north will return all master address records that contain the words 100 and north. For a list of everyone living in Indianapolis, Indiana, simply type: Indianapolis IN. You can enter the street number, direction, street name, street type, city, state, and zip, or a combination (100 Indianapolis, for example).



In the results list, click on an Index ID link to quickly view address details.



You can search for records that were created within a particular date range or by a particular user.



You can search for address records by Latitude and Longitude using the **Other Info** option under *Additional Search Oriteria* located at the bottom of the page.



You can also search address records by Caution Code using the **Cautions** option under *Additional Search Oriteria*.

For instructions on adding an address to the Master Index, refer to "Adding Address" on page 107.

## **Adding Master Index Records**

Master Index records can be added with appropriate permissions. If the Master Index record you searched for does not exist, click on the **Add** button to create the Master Index record.

**Note**: Person, Address, and Property instructions are provided, though the same general process is also used when adding Organization, Vehicle, and Gang.

For details on accessing the Master Indices, refer to "Accessing Master Indices" on page 84.

For details on searching for Master Index records, refer to "Searching Master Records" on page 85.

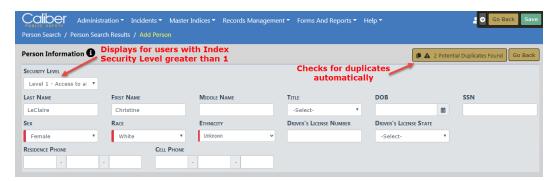
## Adding Person

After searching for a Master Person record, the *Person Search Results* screen either displays a list of names that match your search criteria, or it indicates no records are

found. For more information about searching Master Indices refer to "Searching Master Records" on page 85.

To add a new person record, click the **Add Person** button to open the *Add Person* screen.





Physical Description, Person Photo/Mugshot, Residence Address and Vehicle are included on the Add Person screen.

**Note:** To maximize your screen real estate and improve usability, the *Add Person* entry fields dynamically scale to screen size, reducing the number of rows when adding a new master person record.

The system checks for duplicate Master Person, Master Address, and Master Vehicle records automatically based on certain criteria.

For a visual of the duplicate auto search criteria, hover your mouse over the information bubble 1 as shown below. An information box describing the criteria appears, and the criteria fields change to red.

**Note:** This applies to Person Information, Residence Address, and Vehicle sections.



The following describes the duplicate auto search criteria per section:

#### **Person Information**

- Last Name and First Name
- OR SSW
- OR Last Name, First Name, and DOB
- OR DL Number and DL State.

**Note**: Sex, Race, and Ethnicity are required, so you must also select values in these fields even though they are not criteria in the duplicate search process.

#### **Residence Address**

Street Number, Street Name, City, and State

Note: Beginning with RMS 11.10, location search is greatly enhanced. Begin typing the address and the system will return RMS locations. If your agency has Google Places turned on, you will also see Google addresses. Links will appear that allow you to add addresses and/or interact with a map for location identification.

#### **Vehicle**

- VIN
- OR License and State

When the automatic duplicate search is complete, a message appears on the top right of each section, indicating whether or not possible duplicates are found.



For more information about duplicate records, refer to "Duplicate Records" on page 118 .

You can add a person one of two ways:

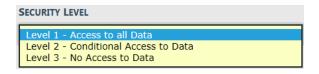
- Manually enter the data in each section.
- Import from external systems, if applicable to your agency.

#### Manual Entry

#### **Enter Person Information**

Enter the person information. Online RMS checks for duplicates automatically, and it displays a message indicating whether or not duplicates exist. For more information about duplicate records, refer to "Duplicate Records" on page 118.

The **Security Level** field displays for users that have an **Index Security Level** greater than 1 defined on their user profile page. There are three levels that control data access: Level 1, Level 2, Level 3. Level 1 is the default security level for new master indices records and on all new user accounts.



For more information on Master Index Security, refer to "Master Index Security" on page 83.

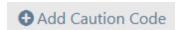
When entering the DOB, a verification message displays at the top of the form when the person is a Juvenile or is older than 100.



Add additional person and physical description information in the fields provided.

#### **Enter Caution Codes**

If you have appropriate permissions to add a **Caution Code** to a person record, click **Add Caution Code** to open the *Add Caution Code* form.



For details on adding a Caution Code, refer to "Caution Codes" on page 125.

#### **Enter Residence Address**

Click Add Residence Address to open the Address Search screen.

The first field *One Line Entry* on the *Address Search* screen can be used to type the entire address on one line and perform a **Geo Search** against **Google Maps** or you can add the Street #, Name, Type, and City, and State in the appropriate boxes, then click to **Geo Verify**. A green *Geo Verified* message appears on the top left of the *Residence Address* section when successfully verified.



The system imports the available information such as, County, Country, Latitude, Longitude, zip. Review the imported data for accuracy and add or update information as needed.

It is important that all addresses save with their corresponding coordinates as Online RMS uses the information when performing event mapping.

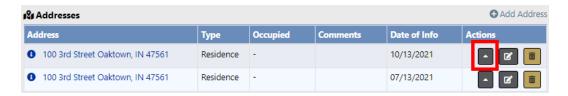
After entering address data, Online RMS checks the *Master Address Index* for duplicates automatically, and it displays a message indicating whether or not duplicates exist. For more information about duplicate records, refer to "Duplicate Records" on page 118.



#### **Add Multiple Addresses**

Click the Add Address in the Address grid to add multiple address types, such as residence, business, p.o. box, etc.

You can also select the **Make Most Recent** icon to make a duplicate of that address, then make any necessary changes.



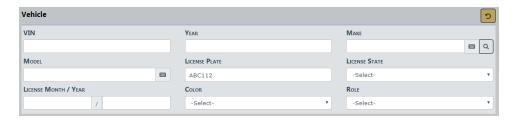
#### **Enter Relations Information**

Click the **Add From Master Person** link to open the *Person Search* screen to search for the name in the Master Person Index module.

Or, click the **Add Without Master Person Record** link to provide minimal information if insufficient information is available to create a master person record.

#### **Enter Vehicle Information**

After entering initial vehicle data, Online RMS checks the *Master Vehicle Index* for duplicates automatically, and it displays a message indicating whether or not duplicates exist. For more information about duplicate records, refer to "Duplicate Records" on page 118.



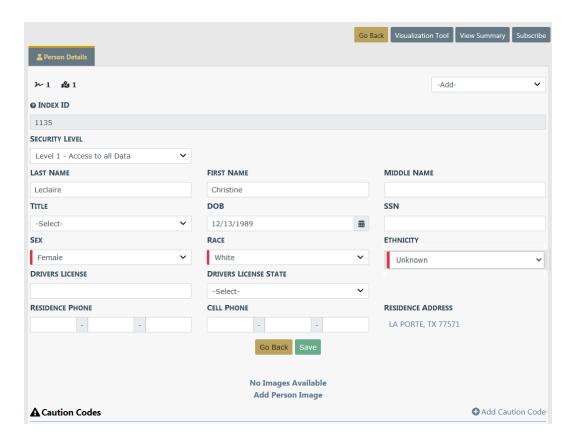
To remove your entered text from the residence address fields, click on the **Reset** button.

**Note:** Add additional vehicle information in the fields provided. You must select a **Role** before allowed to save the record.

#### Save Entry

After entering the necessary information, click the **Save** button on the bottom or top of the screen to save the entry and open the *Person Details* screen.

Chapter 8. Master Indices



Apply any additional updates if needed, then click **Save**.

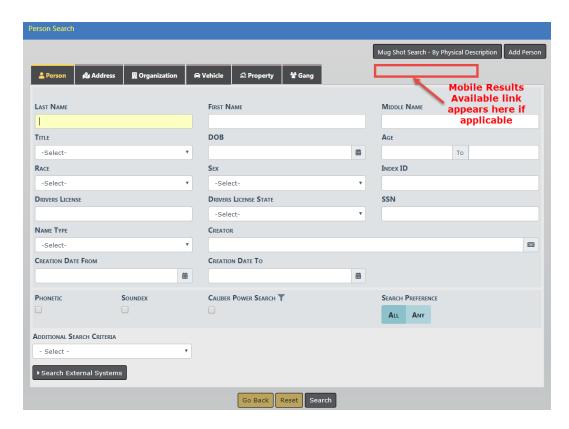
#### Import/Update Person Results from External Systems

#### **Import New Person**

If a person record does not exist in Online RMS, data from the external data source can be imported.

#### Caliber Mobile

For agencies using both *Caliber Mobile* and *Online RMS*, person results that exist in *Caliber Mobile* within the last 24 hours are accessible on the *Add Person* screen by clicking on the **Mobile Results Available** link that is also prefixed by the number of results found.

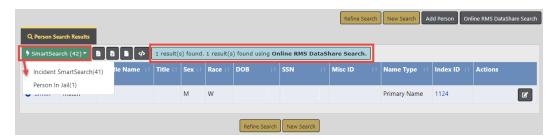


Select the person record from the Mobile Results screen.



#### **External Person Search Interfaces**

For agencies having access to *Online RMS Statewide*, *InterDEx*, *Jail Tracker*, and other External Person Search interfaces, click on the **Smart Search** drop-down list in the *Person Search Results* for a list of search options, or click **Online RMS DataShare Search** to view potential matches outside of the Online RMS for the person.



The example below steps you through the Jail Tracker import process.

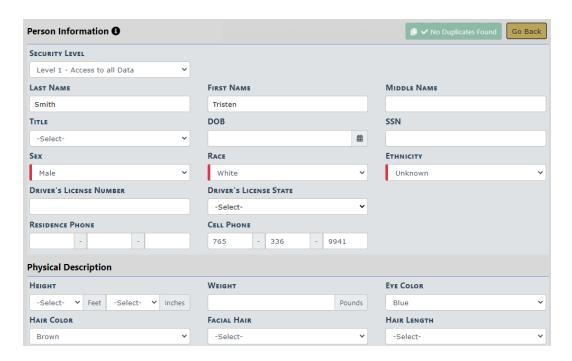
#### Click Person in Jail under Smart Search, then click on Import Record.



The Information that displays on the form is what is available in the external source, *Ail Tracker* in this case.

**Note:** The **Import Record** link appears no matter which external search option you choose, but the position of the link could vary on the screen by interface.

The available person, address, vehicle, and image data then imports into the **Add Person** screen. The system then searches for duplicate Master Person, Master Address, and Master Vehicle data automatically. For more information about duplicate records, refer to "Duplicate Records" on page 118.



Manually update data as needed and select images to include, if applicable.

Click **Save** to create the applicable Master Index records or click **Go Back** to return to *Master Index Search*.

#### **Update Existing Person**

If a matching person record exists in the Online RMS, data from the external data source can be added to the existing person record. Start by selecting the person from the duplicate search results dialog box.

#### Caliber Mobile

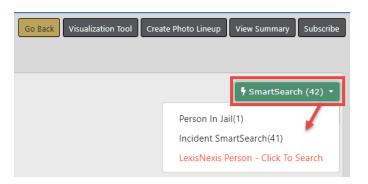
For updating persons coming from Mobile DIS returns, select the duplicate existing person record during the **Add Person** flow, then select **Yes** when asked if you would like to *import your data into the person record*.



For details on importing a person from Caliber Mobile refer to "Caliber Mobile" on page 103.

#### Other External Data Sources

For Statewide, InterDEx, Jail Tracker, and other External Search Sources, updates to add data from the external data source can be made directly from the Edit Person page. Click **Smart Search**, then click the applicable item from the list to view potential matches from external data sources.



On existing records, an **Update Record** button appears instead of **Import Record** that is shown under the *Import Person* section. Click on the link to choose information from the external data source to add to the existing person record, including photo if available.

### **Adding Address**

**Note**: When adding a new person, the address can be added as part of that process. For more information about adding a person, refer to "Adding Person" on page 97.

When an initial search of the database does not locate an existing address matching the search parameters, select the **Add Address** button to add the address. For more information about searching addresses, refer to the *Address Search* section of "Searching Master Records" on page 85.

The following fields are required if configured as such for your agency:

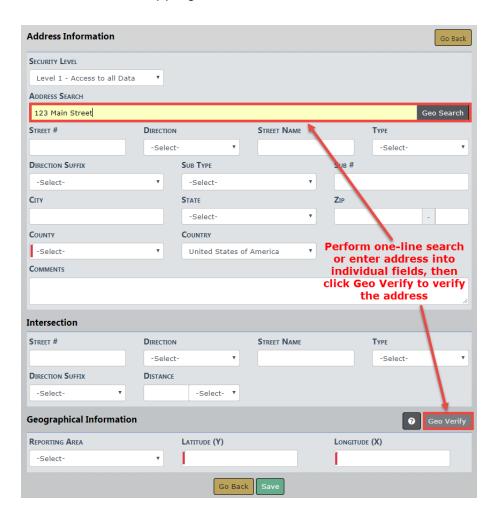
- County
  - Your agency administrator can require you to enter the County by setting the ADDRESS\_REQUIRE\_COUNTY Maintenance Value flag to Y. Refer to your agency administrator for more information.
- Latitude and Longitude

 Your agency administrator can require you to enter the Lat and Long by setting the ADDRESS\_REQUIRE\_LAT\_LONG Maintenance Value flag to Y.

#### Specific Address

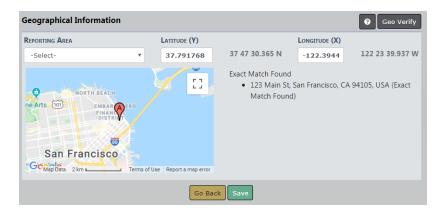
The top *Address Search* line can be used to type part or all of the address on one line and perform a **Geo Search** against **Google Maps**, or you can add the Street #, Direction, Street Name, Type, and City, and State in the appropriate boxes then click to **Geo Verify**.

**Note**: It is important that all addresses are saved with their corresponding coordinates as Online RMS uses the information when performing event mapping.



The **Geo Search** returns either an exact address match along with a map showing a pin positioned on it and will fill in the Latitude and Longitude for the searched address, or a possible list of address matches from which you choose fills in the Latitude and Longitude information. If the returned pin on the map is not in the exact location, you can move the pin by clicking on the map in the location that the pin should be positioned; this updates the Latitude and Longitude coordinates.

Example of an exact match:



If multiple addresses appear in the list a **Use This Location** link appears next to every listed address record. Click the **Use This Location** link to choose a selected address and add it to the record.



Once the correct **Geo Location** is selected and the coordinates are updated, verify the address information entered into each field.

**Note:** Vehicle, Gang, and Organization information is added by using the same process; searching for an existing record first. If the record does not exist, select the *add* hyperlink.

#### Intersections

Intersection information can be parsed from Google search results and imported into the address record.

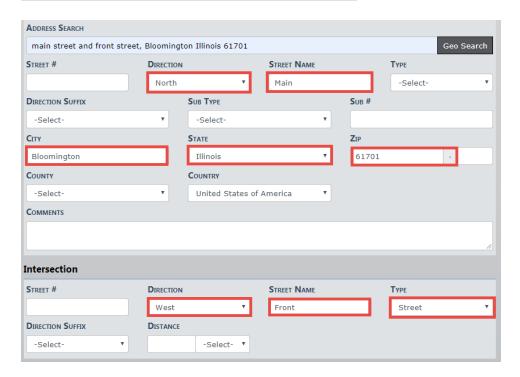
Enter the intersection information into the Address Search field then click Geo Search. to view the Goggle search results.



In the Google search results window, click the Use This Location link to parse the intersection information and import into the record.



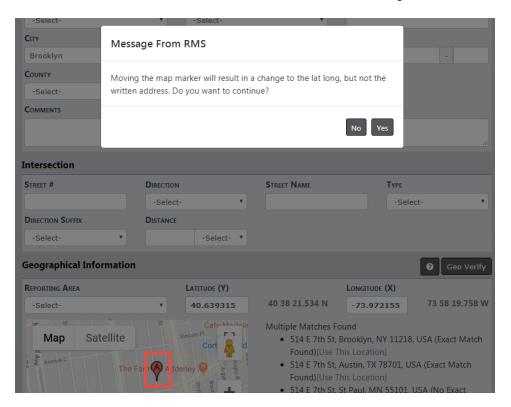
undefined. Some possible matches: • N Main St & W Front St, Bloomington, IL 61701, USA[Use This Location]



#### **Dynamic Map Marker**

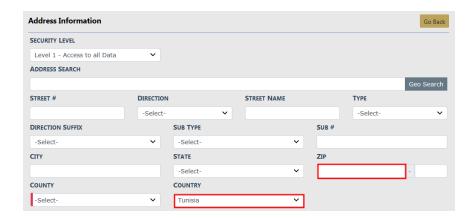
For events occurring at locations that are not at a specific address, you can drag the map marker location on the map to use Geo-Coordinates for that location. Choose a result from the location matches found, then drag the Map Marker to the exact location on the map to update the Geo-Coordinates for the Master Location record.

A message appears stating that moving the marker results in a change to the lat long, but not the written address. Select **No** to abort the change, or **Yes** to continue.



#### Other Countries

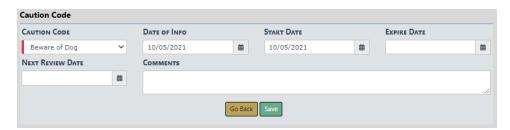
When choosing a **Country** other than the *United States*, the system does not validate or enforce **Zip Code** entry rules.



#### Caution Codes

You can add caution codes to an address after saving the record.

Click Add Caution Code to open the Add Caution Code window.



Select the Caution Code and enter the needed information, then click Save.

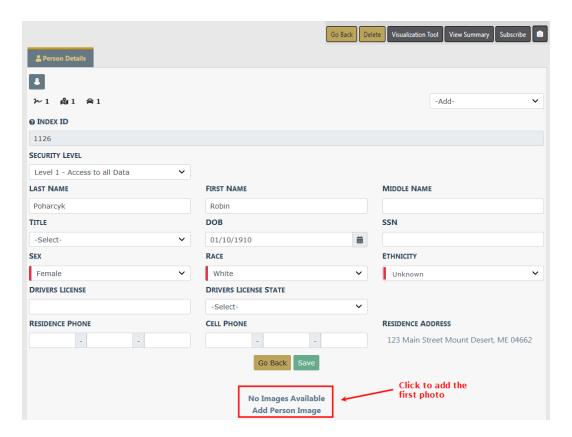
You can then add related events and attachments to the Caution Code.

For more information on Caution Codes, refer to "Caution Codes" on page 125.

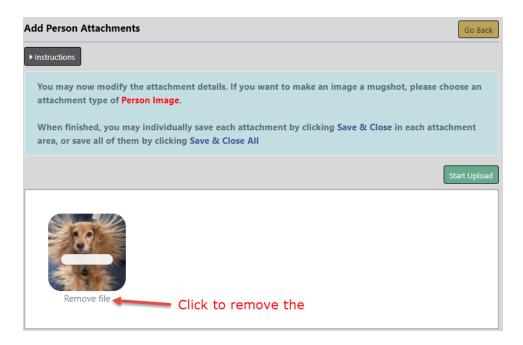
# **Adding Photos**

# Adding the First Photo

1. Select the **Add Person Image** link on a *Master Person Index* record that does not yet have a photo.

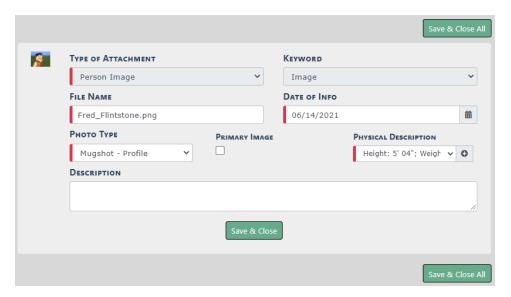


- 2. Either drag and drop one or more photos onto the space provided, or click Add Files to select.
- 3. Click Start Upload.

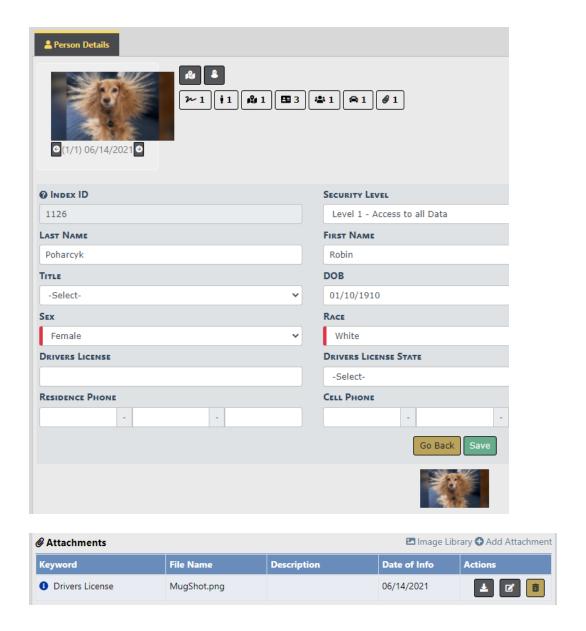


Click Remove File if you would like to remove the photo.

4. A dialog box opens.

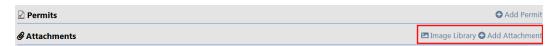


- 5. Select and enter the necessary information. Select Primary Image, if applicable.
- 6. Click **Save & Close** to save an individual attachment, or click **Save & Close All** to save all attachments.
- **7.** The photo uploads to the master person record and the file appears in the *Attachments* grid of the master person record.



# **Adding Additional Photos**

1. Page down and select the Add Attachment or Image Library link.



To add image files from your personal *Image Library*, select the **Image Library** hyperlink. If images do not exist in your Image Library, then the hyperlink does not appear.

2. Refer to "Add Attachments" on page 67 or "Image Library" on page 73 for more information.

### **Adding Property**

When an initial search of the database does not locate an existing property record that matches the search parameters, select the **Add Property** button. For more information about searching, refer to "Searching Master Records" on page 85.

**Note:** If applicable to your agency and with appropriate permissions, you can click on the **Records Management** top menu, then **Create Held Property** to add a property record. This option is only available to users with the *Evidence - Create Held Property* permission.

The Add Property form opens.

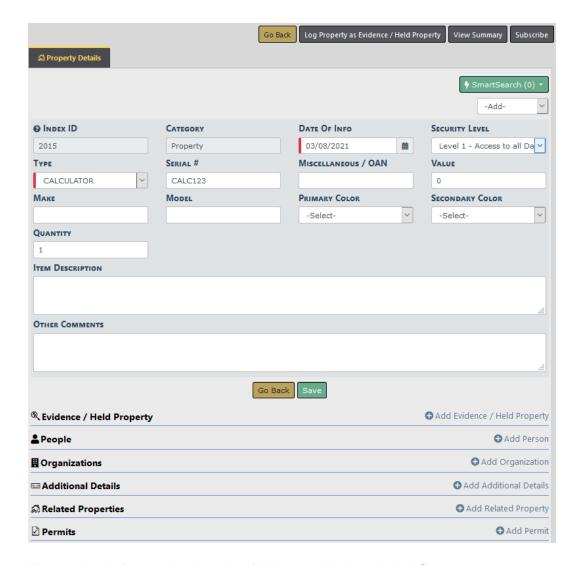
Property Information			Go Back
SECURITY LEVEL	CATEGORY		
Level 1 - Access to all Data	Property	O Drugs O Documents O Curr	ency O Guns
Түре	SERIAL #	MISCELLANEOUS / OAN	VALUE
-Select-			
Маке	Model	PRIMARY COLOR	SECONDARY COLOR
		-Select-	-Select-
QUANTITY	ITEM DESCRIPTION		
1			
DATE OF INFO	COMMENTS		ii.
3/8/2021			
			.d
	Go	Back	

Select a **Security Level**. For more information on Master Index security levels, refer to "Master Index Security" on page 83.

Select a **Category**. The fields that appear on the form may change based on the Category you choose.

Enter details of the property in the fields provided.

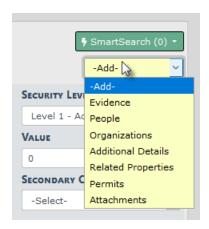
Select the **Save** button to create the record and open the *Edit Property* form.



Enter other information into the fields provided and click Save.

Optionally click on the plus sign (+) to associate the various categories, such as person, organization, properties, permits, or add additional information such as details or attachments. These categories vary by agency and permissions.

 An alternative method is to select an option from the drop-down list that does the same thing.



 Also, you can click the Log Property Evidence/Held Property button to log the property as either evidence or held property. For more information on evidence and held property, refer to "Evidence/Property Mgmt Module Overview" on page 481.

Note: To have access to the Evidence drop-down option and the Log Property Evidence/Held Property button, you must have the Master Indices - Add Evidence to Master Index Property permission.

Click on the **Subscribe** button to receive a notification when another user views, updates or associates the property record. For more information on subscribing, refer to "Subscribe to Master Records" on page 132.

# **Duplicate Records**

When attempting to enter a new person, address, organization, vehicle, property, or gang index record through the *Master Indices* menu, the system compares the entered data with existing records, and if a match between the two is found, an error message displays. If you continue creating the duplicate record, the system requires a reason as to why and the record is saved for later review.

**Note**: While the examples listed in this section reference Person, a similar process applies to all *Master Indices*.

For descriptive information on *Master Indices*, refer to "Master Indices Overview" on page 81.

For instructions on entering a new person or address record, refer to "Adding Person" on page 97 or "Adding Address" on page 107, respectively.



When entering a new Person record, the system checks for possible duplicate records and a message displays indicating whether or not a possible duplicate is found.

### **No Duplicates Found**

If no duplicates are found, a green *No Duplicates Found* message appears on the top right of the section.



## **Possible Duplicates Found**

A **Potential Duplicate Found** warning message appears if the system detects a match between the new record and an existing record.

**Note**: Error messages are highlighted in yellow for purposes of illustration here. These error messages appear in **red** in the application.

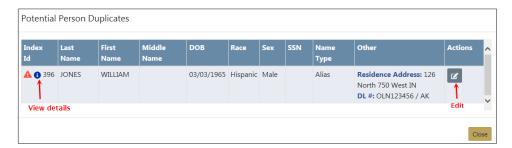




Click on Potential Duplicates Found to view the existing records.

### Person Duplicates

Click on the *Potential Duplicates Found* message to display the list of duplicate records, to manually assess whether or not duplicates truly exist.

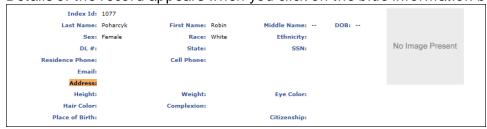


With proper permissions you can view details or edit (update) the existing records that appear in the list instead of creating a new entry.

If duplicate entries exist for the same record they can be **Collapsed** together to create one record. Please contact your agency administrator if this function needs to be performed on the duplicate records.

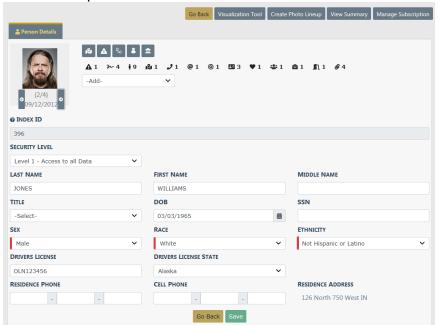
#### **View Details**

Details of the record appears when you click on the blue information bubble.



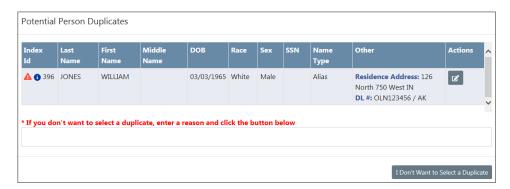
#### **Edit Record**

You can update an existing record rather than create a new record, if appropriate. The *Details* screen appears after you select the **Edit** icon in the *Actions* column of the Potential Duplicates list.



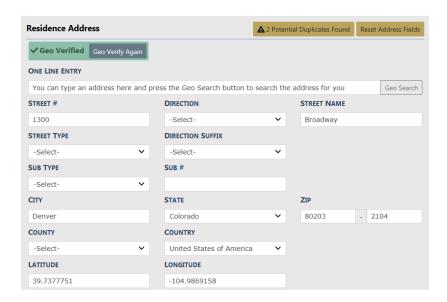
Make the necessary updates, then click **Save**, or click **Go Back** to return to the **Add Person** screen.

If you choose to click **Save** to create the record, even though potential duplicates are found, a screen appears asking you to select existing records as duplicates. Select duplicate records, or click the *I Don't Want to Select a Duplicate* button to create the record without selecting duplicates. You must enter the reason for the duplicate.



#### Residence Address Duplicates

Enter the address information.



If potential duplicates are found, click on the *Potential Duplicates Found* message to display the list of duplicate records, to manually assess whether or not duplicates truly exist. With proper permissions you can view details or edit (update) the existing records that appear in the list instead of creating a new entry.

Residence Address Potential Duplicates

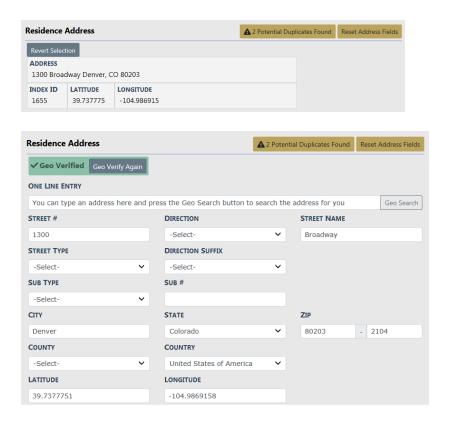


Optionally, click on or hover over the blue information bubble 10 to view additional information.

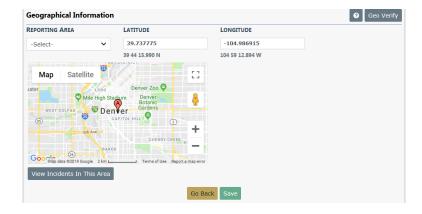
If one of the duplicates contains the address you need, select it instead of creating a new record by clicking on the Select icon in the Actions column.

Optionally, click the Reset Address Fields button to clear the entered data.

Optionally, click the **Revert Selection** button on the upper left to remove the vehicle and redisplay vehicle fields



When selecting an existing record from the list, the system inserts the address map.

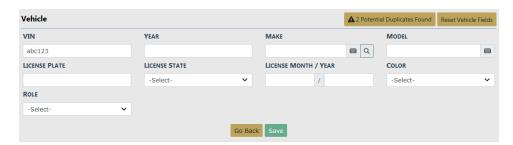


Click the Save button.

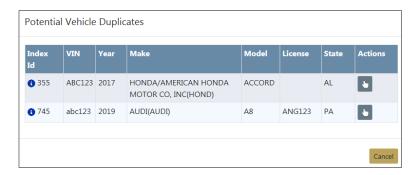
#### Vehicle Duplicates

Click on the *Potential Duplicates Found* message to display the list of duplicate records, to manually assess whether or not duplicates truly exist. With proper permissions you can

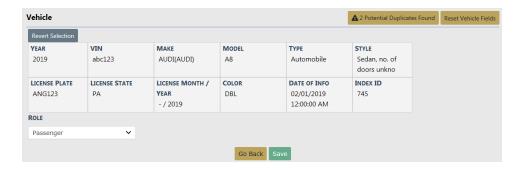
view details or edit (update) the existing records that appear in the list instead of creating a new entry.



Optionally, click on the blue information bubble • to view additional information. If one of the duplicates contains the vehicle you need, select it instead of creating a new record by clicking on the Select icon in the Actions column.

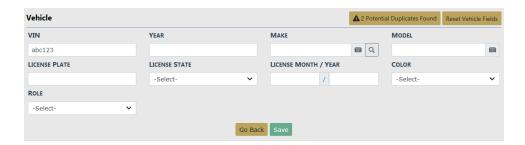


When selecting an existing record from the list, the system inserts the selected vehicle information. Select the **Role**.



Optionally, click the **Reset Vehicle Fields** button to clear the entered data.

Optionally, click the **Revert Selection** button on the upper left to remove the vehicle and redisplay vehicle fields.



Click Save.

# **Caution Codes**

If you have appropriate permissions to add a **Caution Code** to person and address records, click **Add Caution Code** to open the *Add Caution Code* form.



Choose a Caution Code from the drop-down list.

Enter the **Date of Info**.

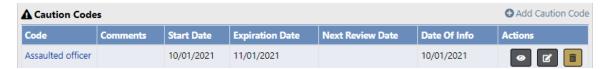
Enter the Start Date.

Optionally enter the Expire Date, Next Review Date, and Comments.

Click **Save** to create an **Active Alert** on that person or address. A red *Alert Icon* appears next to the person's name or address in the *Search Results* window, indicating **Active Alerts**. Refer to "Searching Master Records" on page 85 for details.

Note: The Start Date and Expiration Date determine whether a Caution Code is Active. If the current date falls within the range (or the Expiration Date is empty and the current date is after the Start Date), then the Caution Code is considered Active.

The Caution Code appears in the grid. By using the icons in the *Actions* column, with permissions you can view, update, or delete the Caution Code.

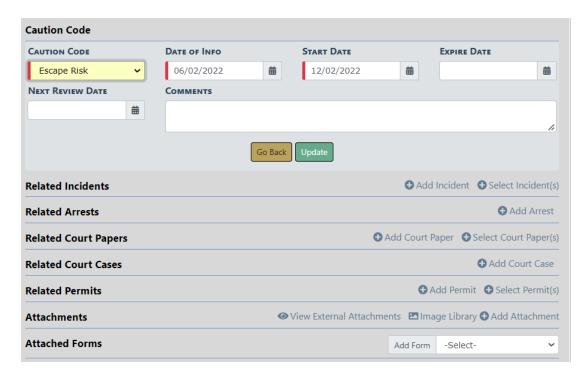


#### **Related Events**

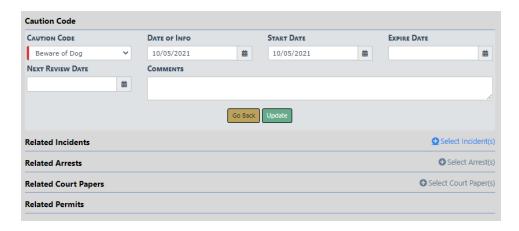
When adding Caution Codes, you can add related events, such as Related Incidents, Related Arrests, Related Court Papers, Related Court Cases, and Related Permits.

Click the Edit icon in the Caution Code grid to edit the Caution Code.

The *Edit Caution Code* form opens, giving you the opportunity to associate Incidents, Arrests that contain that address with the active caution code. You can associate Court Papers and Permits that have people or organizations associated with the address with the active Caution Code.



As an example, to associate one or more arrests, click **Select Arrests** to display of list of choices from which to choose.





**Select** the all records you want to associate with the active caution code, then click **Save Selected**. The Arrest then appears in the grid.



**Note:** Related Incidents and Arrests do not display when expunged. Hidden Incidents also do not display.

The active Caution Code potentially displays on the following forms when associated:

- Location section on the Incident, Arrest.
- Master Index Organization address.
- Organization Summary Tag.
- · Master Index Person Address.

Click the **Update** button to save.

# **Deleting Master Index Records**

You can edit, delete, and collapse **Master Index** records with appropriate permissions. However, you cannot delete records that are linked to other Online RMS modules.

A **Delete** button appears on the top of the window while on a Master Index record as shown in the example below. This applies to all master index types: Person, Address, Organization, Vehicle, Property, and Gang.



For details on accessing the Master Indices, refer to "Accessing Master Indices" on page 84.

For details on searching for Master Index records, refer to "Searching Master Records" on page 85.

Click on the **Delete** button, then answer **Yes** to confirm deletion.



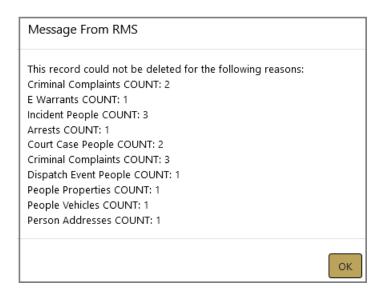
The process then scans the system for possible links to other Online RMS modules.

 If the Master Index record is not linked to other Online RMS modules, a window appears where you enter the **Reason** you want to delete the record.



Click **Delete** to delete the record and return to the *Person Search* page.

 If the Master Index record is linked to other Online RMS modules, a message displays stating the record cannot be deleted with a list the linked modules.



Click **OK** to close the window.

**Note:** Delete activity is written to a log automatically. Create an AdHoc report to view the delete log data.

## **Print Master Person Records**

Master person records can be printed from the View Person Details page.

#### To print a master person record:

Search for and select the appropriate master person record.

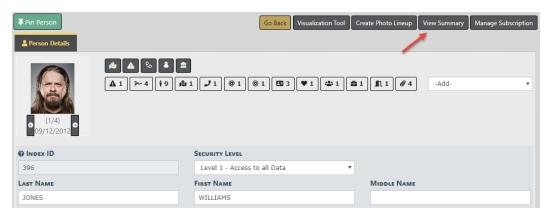
For details on accessing the Master Indices, refer to "Accessing Master Indices" on page 84.

For details on searching for Master Index records, refer to "Searching Master Records" on page 85.

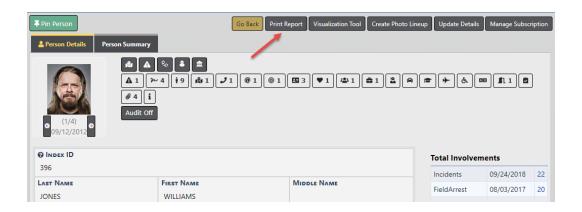
Access the *View Person Details* page using one of the following two methods from the *Search Results*:



- 1. Click on the Last Name or Index ID to open that person's View Person Details page.
- 2. Or, click on the edit icon to open the Edit Person page



Click on the Print Report button to open the Person Details Print Options.



#### **Person Details Print Options**

Please select what information you would li	ike to include in the Person Details Report			
Detail Information:	Summary Information: Select All:			
Warrants:	Incidents:			
Field Contacts:	Citations:			
Permits:	Field Arrests:			
Attachments(PDFs):	Court Papers:			
Attachments(Images):	Attached Forms:			
Caution Code Attachments(PDFs): Redact Social Security #s:				
Caution Code Attachments(Images):				
Caution Code Custom Forms:				
Display Common Event Associations:	dresses:			
Vehicles:	Gangs:			
Properties:				
		Close Print		

Select one or more options listed, or **Select All** to include all options.

Click the Print button.

A PDF document opens in a new tab in your browser. Print directly to the printer or save the PDF document giving it a custom filename.

**Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.

### Subscribe to Master Records

You can **Subscribe** to existing master index records (person, address, vehicle, organization, property, and gang) to receive a notification when someone views, updates or associates the master index records to which you have an interest.

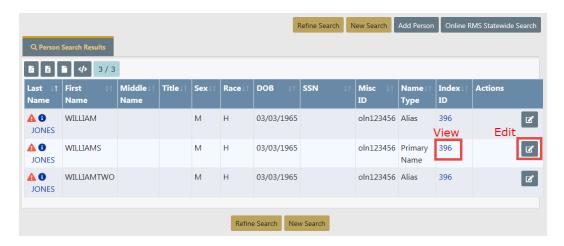
For example, you can **Subscribe** to Williams Jones' master person record to receive notification when someone applies updates to his master person record.

Follow these steps to Subscribe:

1. Search for the master person record to which you want to subscribe.

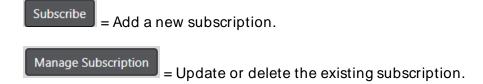
For more information on searching, refer to "Searching Master Records" on page 85.

2. From the search results grid, **View** or **edit** the record to which you want to subscribe.



- 3. The view or edit form opens, based on which option you chose.
- **4.** Whichever option you chose, a Subscription button appears on the top right of the window.

The button varies on whether this is an existing or new subscription:

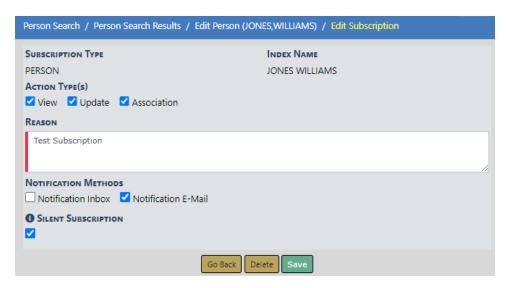


- 5. Click the button that applies in this case.
- 6. The **Subscription** form opens.

If adding a new subscription, an empty Add Subscription form opens.



If managing an existing subscription, the Edit Subscription form opens.



**7.** Select or deselect the appropriate check boxes and provide the reason for the subscription.

If the **Silent Subscription** box is checked, the subscription cannot be viewed by another user.

- 8. Click Save.
- 9. If you want to delete the existing subscription, click the **Delete** button, then confirm deletion.

# Chapter 9. Photo Lineup

# **Photo Lineup Overview**

The **Photo Lineup** module allows the agency to discover or confirm the identity of a suspect by displaying an array of photos of that person. Lineup images support multiple photo types such as mugshots, drivers license photos, etc., and you can mark an image as the primary image. The **Photo Lineup** module is included with the full subscription to Online RMS; however, the agency can contact Caliber Public Safety Support if they choose to disable this feature.

Access to *create*, *edit*, *view*, or *delete* a **Photo Lineup** is controlled by permissions set by your administrator. Refer to your administrator for more information.

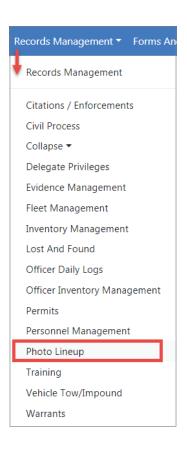
### **Access Points**

The **Photo Lineup** module is accessed from three areas of Online RMS:

- Records Management Menu.
- View and Edit Person pages.
- Follow-up Case Management module.

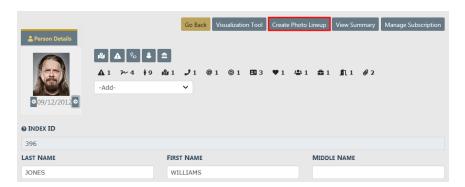
# Records Management Menu

Access the **Photo Lineup** module from the **Records Management** menu.

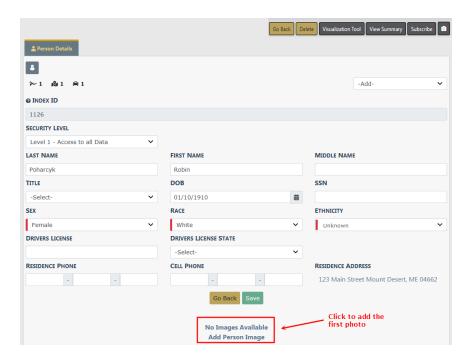


### View and Edit Person Pages

Search and select a person from the *Master Name Index* that has a person photo. For detailed instructions on how to search and access *Master Person* records refer to "Searching Master Records" on page 85.



If an image does not exist for that person, select *Add Person Image*. For more information refer to "Adding Photos" on page 112.



### Follow-up Case Management module.

Create a **Photo Lineup** from **Involved Names and Organizations** grid in the **Follow-up Case Management** module.



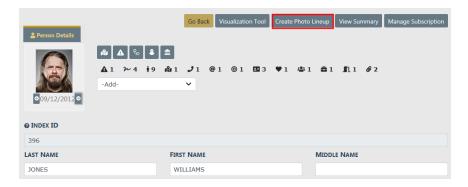
Open a Case, page down to the **Involved Names** section, then click on the Hand icon.

**NOTE**: For more information on accessing the **Case Management** module refer to "Case Management" on page 439.

# **Create Photo Lineup**

Create a **Photo Lineup** from a *Master Person Index* record that already has an existing photo. If the person does not yet have a photo, one must be added. For instructions on adding an initial photo refer to "Adding Photos" on page 112.

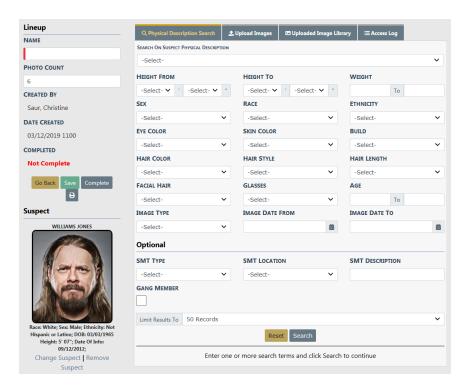
- 1. Search and select a person from the *Master Name Index*. For instructions on searching for a person refer to "Searching Master Records" on page 85.
- 2. Select the Create Photo Lineup button.



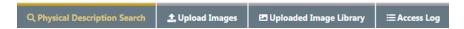
3. Select **Yes** to confirm the creation of the **Photo Lineup**.



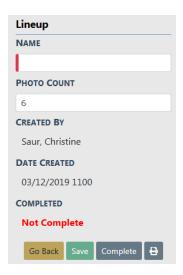
4. The Photo Lineup page appears.



- The left side of the window contains **Lineup** details such as the name, photo count, status, dates, lineup images, etc.
- The right side of the window contains tabs, with each tab serving a particular purpose.



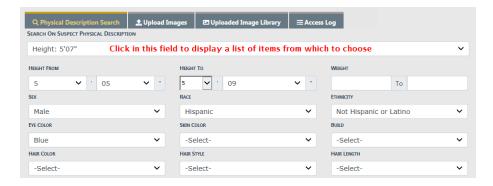
- The primary person photo displays under Suspect on the left side of the page.
- A *Lineup* window displays a status of *Complete* or *Not Complete*. You can save your unfinished work and complete it another time.
- The **Photo Count** is the number of images that must be on a lineup as specified by the Agency.



- 5. You must enter a Lineup Name.
- 6. Optionally, click on the **Search On Suspect Physical Description** drop-down menu to select the physical description information for the person image, to use for searching and finding similar images. After selecting from the list, search parameters will populate automatically based on your selection. Adjust the parameters as needed.

Or you can manually enter the search parameters without selecting from the dropdown list.

For example, if the search parameter displays *Large* you can change it to *Small*; or change it to *-Select*- if you do not want to include the build in your search.



7. Select the **Limit results to** drop down list to adjust the maximum number of photos in your search results as needed.



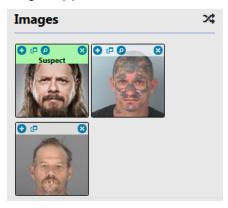
8. Select the **Search** button to find person photos in Online RMS that match your search criteria. The matching person photos appear on the bottom of the window.



**9.** You can either select from the displayed images for the **Lineup**, upload image files from your local or network drive, or both.

#### Select Displayed Images

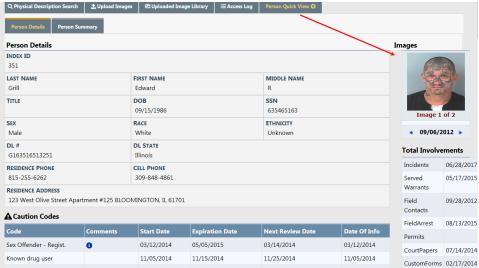
a. **Double click** on the displayed images you want to add to the lineup. The chosen images appear on the bottom left of the window under **Images**.



#### **Upload Image File**

- a. Select the **Upload Images** tab, and select the **Add Files** button or **Drag Files** to add photos from your local computer or network drive. For more information on uploading files. refer to "Add Attachments" on page 67.
- b. Imported images files are added to **Images** automatically and saved in the **Uploaded Image Library** tab for future use.
- **10.** Get additional photo information.
  - a. Click on the **Quick View** folder icon to open a **Person Quick View** tab containing details of that person.





Click on the X to close the tab, if you wish.



b. Click on the + icon to view a larger image of the lineup photo.



c. Click on the 2 icon to replace this image with another.



A Select Image window appears with images from which to choose.

11. If you wish to save your changes and finalize the **Lineup** later, click the **Save** button. The **Save** button changes from red to green.

Once saved, you may return to this **Lineup** to make additional changes until you finalize it by marking it as *Complete*.

- 12. Finalize the photo Lineup.
  - a. When you are satisfied the **Lineup** is complete, click the **Complete** button to finalize.
  - b. The status changes from Not Complete to Complete.

**Note:** The number of lineup images must match the **Photo Count** as specified by the Agency before the lineup can be completed.

- **13.** Click the **Print** icon to the right of the **Complete** button to print the **Lineup**. For detailed instructions on how to print a photo lineup refer to "Print Photo Lineup" on page 146.
- **14.** Click **Access Log** tab to view a log who accessed the lineup. For more information refer to "Access Log" on page 150.

# Remove a Photo

You may want to remove a photo from the **Lineup** window or from the **Uploaded Image Library** tab.

 Click the upper right X on the photos you want to remove from the Lineup window or from the Uploaded Image Library tab.



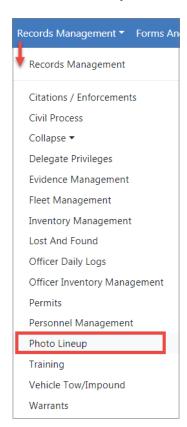
**Note:** Clicking the **X** removes the image immediately, without a confirmation window.

2. Click the Save button.

# Search Lineups

Search Lineups to view, print, edit or delete a lineup.

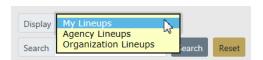
1. Select Photo Lineup from the Records Management Menu.



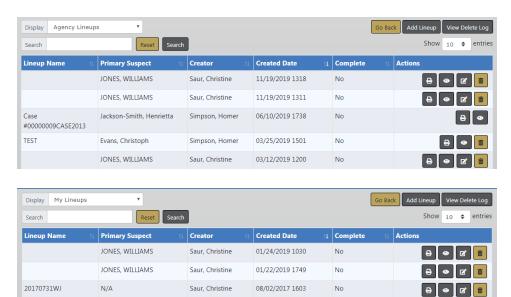
2. Click the **Display** drop-down box to select the group of Lineups to search.

Showing 11 to 12 of 12 entries

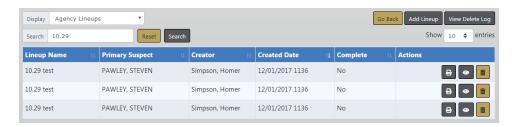
**Note:** User permissions set by the administrator determines what appears in this list. See your administrator for more information.



3. The grid results will change based on the selected **Display** option.



4. You can also enter text into the **Search** field then click the **Search Button** to display lineups where the Lineup Name contains the entered text.



Click the **Reset** button to clear the entered Search text.

You can *print*, *view*, *edit*, or *delete* **Lineups** from the search results, providing your user account has the proper permissions to do so.

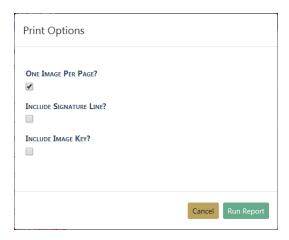
For more information on viewing, editing, or deleting **Lineups** refer to "View, Edit, Delete Lineups" on the next page

For more information on printing **Lineups** refer to "Print Photo Lineup" on the next page.

# **Print Photo Lineup**

The **Photo Lineup** can be printed from the **My Lineups** search results list, while viewing a Lineup, or while editing a Lineup by clicking on the Print icon.

1. Using one of the above methods, the **Print Options** window appears after clicking the Print icon.



2. Check all options that apply then click Run Report.

A PDF document opens in a new tab in your browser. Print directly to the printer or save the PDF document giving it a custom filename.

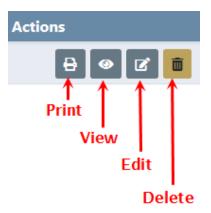
**Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.

# View, Edit, Delete Lineups

You can *view*, *edit*, or *delete* **Lineups**, depending on your permissions set by your administrator. Refer to your administrator for more information.

1. **Search** for the **Photo Lineup** you want to *view*, *edit*, or *delete*. For details on searching refer to "Search Lineups" on page 144.

The icons listed under the **Actions** column of your search results indicate what is available to you, and it can differ by Lineup.



When an icon does not display, then that action is not available to you. For example, if you do not see the *Edit* icon, then you cannot edit that particular **Lineup**.

**Note:** Click the *Print* icon on the Lineup that appears in the search result grid, or print Lineups from other areas of the **Photo Lineup** module. For more information on printing refer to "Print Photo Lineup" on the previous page.

#### View

1. Click the View icon on the **Lineup** that appears in the search results grid.



 The Photo Lineup contains photos, the date the Lineup was created, the person who created it, the current status, and an Access Log tab that tracks who viewed or printed the Lineup.



#### Enlarge an Image

Click on an image to enlarge it, then use the left and right arrows to view the other images, or click the upper right **X** to close it.



#### View the Access Log

Click on the **Access Log** tab to view who accessed the **Lineup**. For more information refer to "Access Log" on page 150.



#### **Edit**

1. Click the Edit icon on the Lineup that appears in the search results grid.



- 2. Make the necessary changes to the **Lineup** page. *Editing* and *Creating* **Lineups** share the same functionality; therefore, refer to "Create Photo Lineup" on page 138 for more information.
- Click the Save button when finished.
- 4. Click Go Back on the upper right of the window to return to the search results grid.

#### Delete

1. Click the *Delete* icon on the **Lineup** that appears in the search results grid.



2. Enter the **Reason** for deleting the Lineup, then click **Delete**.



3. Deleted **Lineups** are logged with high-level information such as the agency, suspect, the person who deleted them and why. Click the **View Delete Log** button to view a list of deleted **Lineups**. For more information refer to "Delete Log" on the next page.



# **Access Log**

The **Photo Lineup** includes an **Access Log** that tracks who viewed, printed, and once finalized, who edited the **Lineup**. The **Access Log** is available when viewing and editing **Lineups**.

Click on the Access Log tab to view the Lineup activity.



The label Finalized contains the current status of the Phone Lineup:

- Not Completed indicates the Lineup setup is still in progress and changes could yet occur.
- Completed indicates the Lineup setup is complete and changes are not likely.

Enter text into the **Search** box to display only records that match that text. For example, to list only records that were printed, type *Print* in the **Search** box.

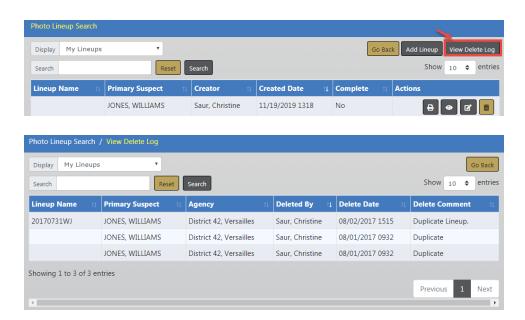


2. Click the Go Back button to return to the Search results grid.

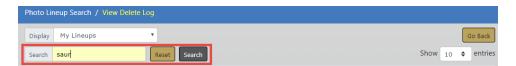
# **Delete Log**

Deleted Lineups are logged and viewable. The log contains high-level information such as the agency, suspect, who deleted the Lineup and why, and the date it was removed.

1. Click the View Delete Log to review deleted Lineups.



2. Enter text into the search box to display only records that match that text. For example, to list only records deleted by Saur, type Saur in the search box, then click the **Search** button.



3. Click the **Reset** button to remove the text from the search box, or click **Go Back** to return to the previous screen.

# **Chapter 10. Crime Visualization Tool**

# **Crime Visualization Tool Overview**

The **Crime Visualization Tool** displays connections, or network, between persons, vehicles, addresses, phones, and involvement in police-related events in a graphical format to identify complex relationships, which then improves the likelihood of solving more crimes. The **Crime Visualization Tool** produces a graph, also known as the **Spider Chart**, because of its web-like appearance.

The **Spider Chart** is made up of a network of associations that are connected: People, places, things, and events. The following **Network Associations** are currently supported:

# Organizations People Addresses Phone Numbers Vehicles Incidents Field Contacts

Organizations (Relationships)

#### **People**

Vehicles

Gangs

Addresses

Incidents

Field Contacts

Phone Numbers

Organizations (Employment, Education)

People (relationships)

## **Vehicles**

People

Incidents

Field Contacts

#### Gangs

Field Contacts

People

Associated Gangs

#### Addresses

People

Organizations

Incidents

Field Contacts

#### **Phone Numbers**

People

Organizations

#### **Field Contacts**

People

Incidents

Gangs

Vehicles

Addresses

#### **Incidents**

People

Organizations (Victims, Other Names)

Vehicles

Addresses

Field Contacts

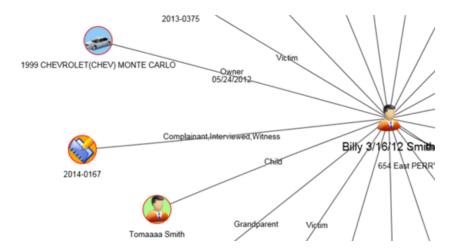
# Spider Chart

The **Crime Visualization Tool** that generates the **Spider Chart** is accessible from various pages of Online RMS such as Incident Summary, Persons, etc., by clicking on the **Visualization Tool** button or other method, depending on the Online RMS page. For more information on accessing the **Crime Visualization Tool** refer to "Access Points" on page 162.

Below is an example of a **Spider Chart** generated from the *Edit Person* page for Billy Smith. Billy Smith appears in the center of the chart with connecting lines to each association, also known as **Element**.



A closer view of the same chart shows the associated label to each **Element**, such as Grandparent, Victim, Child, etc.



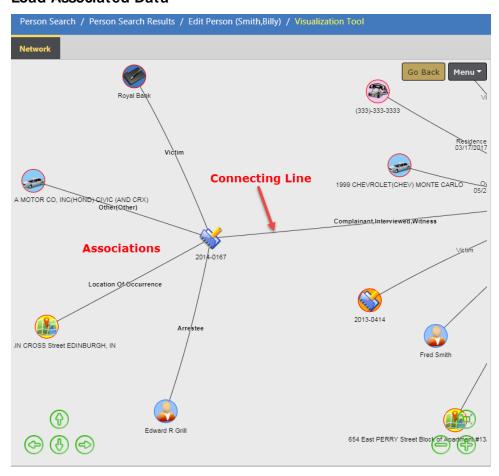
Click on an **Element** to open a box containing links to either view the data in a new tab, or include all associations to that **Element** on the **Spider Chart**.

**Note**: Double Click on an **Element** to immediately open all associations to that **Element** on the **Spider Chart** without displaying the box.

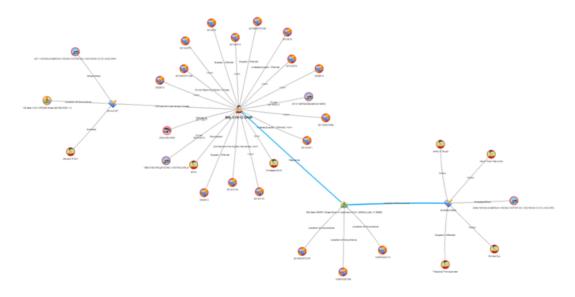
#### **Open in Viewer**



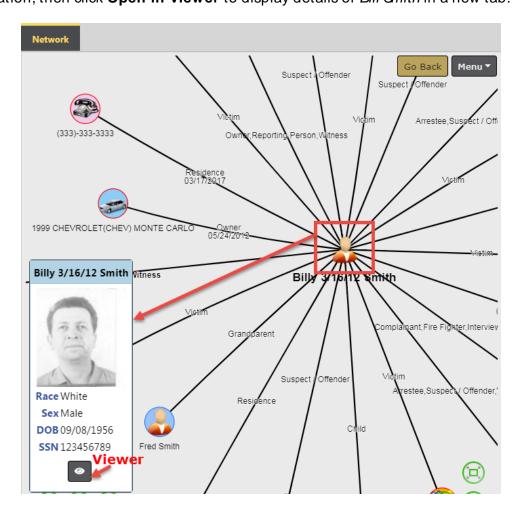
#### **Load Associated Data**

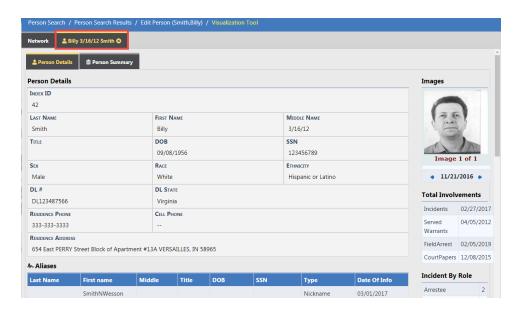


Open and expand associations to multiple **Elements**, and at multiple levels.



The record from which you accessed the **Crime Visualization Tool** displays as the center **Element** in the **Spider Chart**. The above chart generated from *Persons* for Billy Smith. Click on the *Billy Smith* **Element** to display a box with a link to additional information, then click **Open in Viewer** to display details of *Bill Smith* in a new tab.

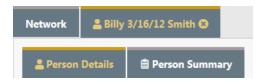




Click the X on the right side of the tab to close.



Click on the **Person Details** or **Person Summary** sub-tabs to view details of the associations, or a summary.



# **Spider Chart Components**

# Structure and Terminology

The Spider Chart consists of several components:

- Network
  - A visual representation of the entire collection of nodes, elements and associations, and how they interrelate.
- Node

- Collection of elements and their association to one another.

#### Element

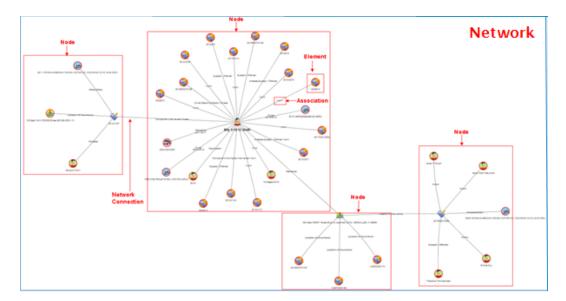
- The representation of specific people, places, things or events.

#### Association

 A line with description showing how elements are associated with one another.

#### Network Connection

- A line that represents the connection between Nodes within the Network.



#### Manually Re-size the Chart

You can re-size the chart by using the mouse, keyboard, or the resizing icons.

#### Mouse

Click anywhere on the chart then move the mouse wheel away from you to enlarge the image on the screen, or move the mouse wheel toward you to decrease the size of the image.

#### Keyboard

Press the **Ctrl** and **+** (plus sign) keys simultaneously to enlarge the image, or press the **Ctrl** and **-** (minus sign) keys to decrease the size.

#### **Resizing Icons**

The resizing icons allow you to easily zoom in, zoom out, re-center, or move the visualization up, down, left or right.



#### Manually Reposition the Chart

Click anywhere on the chart then drag to a new location on the screen.

#### Re-Center and Filter the Chart

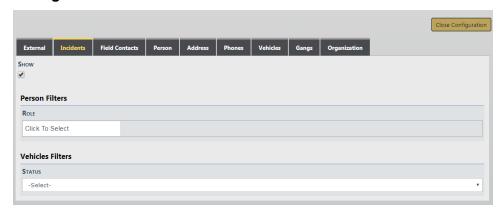
Click on the **Menu** button on the top right to re-center the chart and include or exclude filters, print, and set controls.



#### Center on Start

Re-centers the **Network** display on the screen.

#### **Configure Filters**



Select one or multiple roles from the list. To remove a chosen role, click on the X.



- Select one status from the list
- Click Close Configuration to apply the Filters.

**Note**: Filters are reciprocal, which means if you filter the incident category using person details, it also filters on the person category of the associated incidents.

#### **Reset Filters**

Clears any Filters applied and redraws the chart.

# **Access Points**

The **Crime Visualization Tool** is currently accessible from the following pages in Online RMS for users with the *Crime Visualization Tool Role*:

**Note:** For more information on the *Crime Visualization Tool Role* contact your administrator.

- Incident Summary.
- Master Indices Details, in both View and Edit modes.

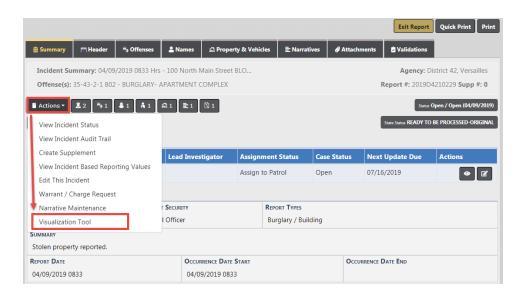
- Organization, Person, Address, Vehicle, and Gang.
- Field Contacts, in both View and Edit modes.

# **Incident Report**

The **Crime Visualization Tool** is currently accessible from the Online RMS **Incident Report** page for users with the *Crime Visualization Tool Role*:

**Note:** For more information on the *Crime Visualization Tool Role* contact your administrator.

Click on the **Actions** button then click on the **Visualization Tool** menu option.



The **Spider Chart** will open with the **Incident Report** as the center **Element**. For more information on **Spider Chart** refer to "Spider Chart" on page 155.

#### **Field Contact**

The **Crime Visualization Tool** is currently accessible from the Online RMS **Field Contact** page in both the View and Edit modes, for users with the *Orime Visualization Tool Role*.

For more information on Field Contacts, refer to "Field Contacts" on page 391

#### **View Mode**



#### Edit Mode



The **Visualization Tool** displays a **Spider Chart** with the center **Element** as the record you are on, along with lines leading to its associated records. For example, the center **Element** would be the record in the above example. For more information on **Spider Chart** refer to "Spider Chart" on page 155.

# **Master Indices Detail Pages**

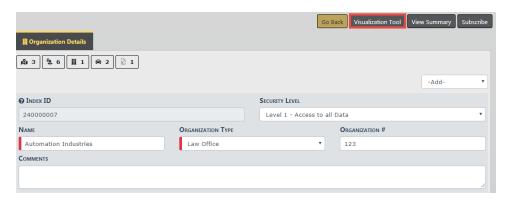
The **Crime Visualization Tool** is currently accessible from the Online RMS **Master Indices** detail pages in both the *View* and *Edit* modes, for users with the *Crime Visualization Tool Role*.

For more information on **Master Indices**, refer to "Master Indices" on page 81.

The **Visualization Tool** displays a **Spider Chart** with the center **Element** as the record you are on, along with lines leading to its associated records. For example, if you open the tool from Billy Smith's Person record, the center **Element** is Billy Smith. For more information on **Spider Chart** refer to "Spider Chart" on page 155.

The **Visualization Tool** is available in either the *View* or *Edit* mode of each category. Below are a few examples.

## Organization



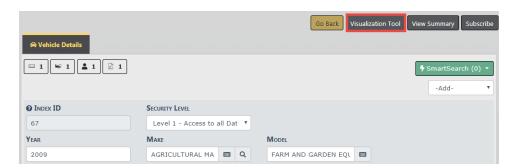
#### Person



#### **Address**



#### **Vehicle**



#### Gang



# Chapter 11. Calls for Service

# Calls For Service Overview

#### Track and Document Calls

The **Calls For Service (CFS)** module allows a user to track calls and document how the call was received, caller's name, type of call, location of call, notes regarding the call, and disposition information. If units are dispatched then the user can capture dispatch, on scene, and clear dates/times for each unit dispatched. If the call requires an Incident report, the CFS user can initiate the report for the responding unit which will link the CFS information to the Incident. This module was designed for agencies that do not require the full functionality of Caliber CAD.

#### **Enhanced Integration from Caliber CAD**

Agencies with an active Caliber CAD interface benefit from enhanced integration to Online RMS. The integration interface transfers Caliber CAD person and vehicle call information to the Online RMS **Calls For Service** module, and it initiates an Incident Report for the responding unit linking the Caliber CAD data to the report.

Integration to Online RMS include the following 11.8 enhancements:

- Vehicle insurance company information now transfers with vehicles that have the
  vehicle insurance company included with the vehicle. The vehicle insurance company is stored with the dispatch event vehicle and with the master vehicle insurance
  record if the vehicle is included on the Incident Report and stored in the RMS Master
  Vehicle index.
- The License Expiration Date is processed for a vehicle sent by CAD. The vehicle description contains the expiration year and month in the Master Vehicles if an incident report is created with the vehicle.
- The CAD RMS Interface sends the Master Person ID from CAD to RMS when the CAD
  user searches RMS for a person and adds that person to the CAD transfer. When the
  RMS Master Person ID is sent from CAD, the person is directly matched with the
  Master Person Record in RMS instead of using the RMS CAD Name Matching process.

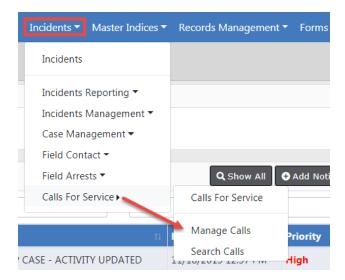
## Create Field Arrest and Import Call Data

Beginning with Online RMS 11.7.0, with appropriate permissions, you can create a Field Arrest and import data from an existing Incident or Calls for Service record into the arrest record, avoiding unnecessary data entry. This process also associates the Field Arrest to the Incident or Calls for Service record automatically.

For details, refer to "Create Field Arrest and Import Data" on page 349.

#### Access Calls For Service

The **Calls For Service** module is located on the top Navigation Bar under the *Incidents* menu option. Click on the **Calls For Service** menu option to display a sub-menu that allows you create, edit, view, and search calls.



To create, edit, or view calls, refer to "Manage Calls for Service" below.

To search calls refer, to "Search Calls for Service" on page 179.

# Manage Calls for Service

You can create, edit, view calls by selecting the Calls For Service **Manage Calls** submenu. For details, refer to "Calls For Service Overview" on the previous page.

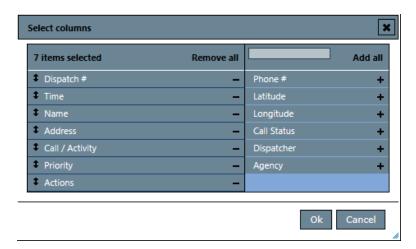
After selecting **Manage Calls** The Manage Dispatch screen appears with two tabs, *Call List* and *Call Map*. The *Call List* tab opens by default.



Using the Columns and Options buttons at the bottom of the screen, you can configure how the Call List displays.



Select the **Columns** button to open a screen to which you can choose what columns you want to view. The left side of the box is the columns you have chosen, the right side of the box are additional columns that are available. Choose the + sign to add and the – sign to remove.



Select the **Options** button to select whether or not to display calls that you do not own, along with the time range of the calls to view. The example shows *Time For Last Closed Call: 1 day ago*, to see all calls through the last call that was closed one day ago. This is adjustable based on what you would like to view. Grid Size is normally *Fit to Screen*.



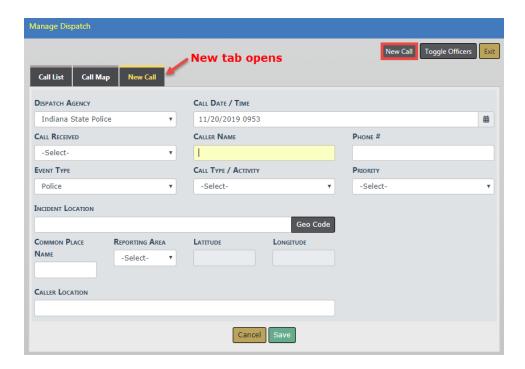
From the **Calls for Service** screen the Officer or Dispatcher has the ability to initiate a New Call, edit or view a call, Toggle Officers, Show Map, and Exit.

#### **Initiate New Call**

To start a **Call for Service**, access the *Manage Calls For Service* menu option, then click the **New Call** button at the top of the *Calls For Service* screen to open a *New Call* tab.

For more information on how to access the Manage Calls For Service menu option, refer to "Manage Calls for Service" on page 168.

**Addresses** are *Geo Verified*. As with address section in RMS you can also associate a common place name as well.



Enter the information known and select Save.

A **Call Number** is assigned to the **Call For Service** record automatically and a *Edit Call* tab opens.



For information on editing a call, refer to "Edit a Call" below.

#### Edit a Call

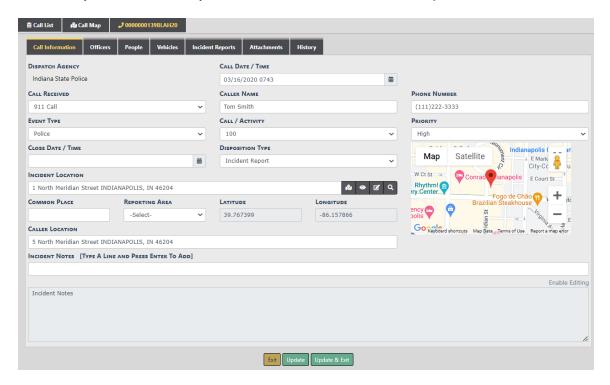
Once the call is initiated, dispatch information such as time and place is available. For more information on initiating a call, refer to "Initiate New Call" on the previous page.

**Note**: When opening a call for editing, the application will check to see if you wish to take ownership of the call in order to edit it. Users cannot edit calls they do not own.

The Officer/Dispatcher has the ability to add any additional Incident Notes. You can return to the call later to finish your edits by accessing the Manage Call For Service submenu option. For more information on accessing the Manage Call For Service sub-menu, refer to "Manage Calls for Service" on page 168.

On the Edit Call screen, sub-tabs and a notes section at the bottom of the screen appear, including the following:

- Call Information with the caller name and the phone number. This tab opens by default.
- Officers tab for adding officers to the call.
- People tab for adding involved persons.
- Vehicle tab for adding involved vehicles.
- Incident Reports tab for creating a new incident from the call and assigning to the primary officer.
- Attachments tab for attaching photos or document files.
- History tab that shows you historical information based upon the address.



#### Call Information Tab

You are taken directly to the **Call Information** sub-tab when the *Edit Call* tab opens as shown in the above image. This tab contains the caller information, location, and incident notes.

For agencies manually entering CFS records, you can select the location from Master Address/Locations. Click on the **Advanced Search / Add** link to search for an address then select it to add it to the CFS record.



When the address record is added to the CFS record, a **View Address** link appears above the location. Click on the link to view the Master Index record.

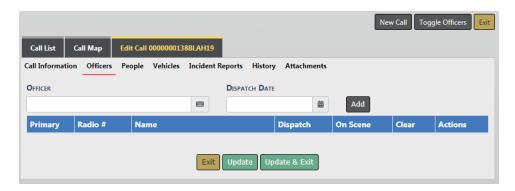


If you are creating an incident, this address also pulls into the Incident automatically.

To close a call, enter the Close Date/Time and select a Disposition from this drop-down list. For more information on closing a call refer to "Close a Call" on page 179.

#### Officers Tab

Use the **Officers** sub-tab to assign the call to specific Officers and enter the Date and Time the officers are Dispatched; from this screen you also have the ability to indicate an On-scene time and Clear time.



#### People Tab

The **People** sub-tab is where involved persons are added. The first step in adding a person is to search for an existing Master Person record. The *Master Person Index* contains a unique record for each person. If the person you are looking for does not exist, then you have the option to create the *Master Person Index* record for that person.

The **Add Master Index Person** link allows you to search the *Master Person Index* for an existing person record, or add a person to the Master Index. The **Add Person link** allows you to add a person to the **Call for Service** record.

Click on **Add Master Index Person** to first search for the person. The *Master Index* Search screen for person appears. Enter the information you want to search on and click the **Search** button to view a list of person records that match your search criteria.

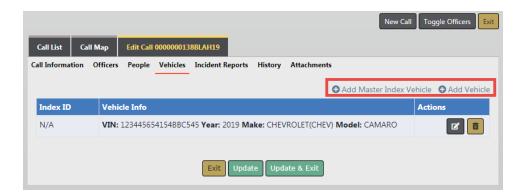
If the person record appears in the results list, click the **Hand** icon in the *Actions* columns to select it and add it to the call. If the person record does not appear in the results list, then click the **Add Person** link on the *Person Search Results* screen to create the *Master Person Index* record before adding it to the call.

**Note**: For more information on searching, selecting, and creating *Master Person Index* records refer to "Master Indices" on page 81.

#### Vehicles Tab

The **Vehicles** sub-tab is where involved vehicles are added. The first step in adding a vehicle is to search for an existing Master Vehicle record. The *Master Vehicle Index* contains a unique record for each vehicle. If the vehicle you are looking for does not exist, then you have the option to create the *Master Vehicle Index* record for that vehicle.

The **Add Master Index Vehicle** link allows you to search the *Master Vehicle Index* for an existing vehicle, or add a vehicle to the Master Index. The **Add Vehicle link** allows you to add a vehicle to the **Call for Service** record.



Click on **Add Master Index Vehicle** to first search for the vehicle. The *Master Index* Search screen for vehicle appears. Enter the information you want to search on and click the **Search** button to view a list of vehicle records that match your search criteria.

If the vehicle record appears in the results list, click the **Hand** icon in the *Actions* columns to select it and add it to the call. If the vehicle record does not appear in the results list, then click the **Add Vehicle** link on the *Vehicle Search Results* to create the *Master Vehicle Index* record before adding it to the call.

**Note**: For more information on searching, selecting, and creating *Master Vehicle Index* records refer to "Master Indices" on page 81.

#### Incident Reports Tab

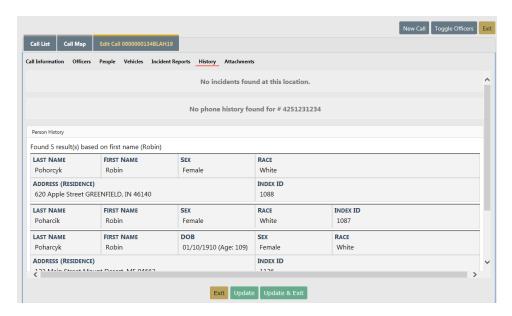
The next sub-tab is the **Incident Reports** tab. Most agencies that are using CFS within Online RMS, or a CAD product, will have the Create Incident Report permission turned off at officer level, and make all incident reports start from CFS or CAD. In CFS under the *Incident Reports* tab you will see the **Create Incident Report** button.



This will take you into creating an Incident Report for the officer in Online RMS.

### History Tab

The **History Tab** will give you database history within Online RMS, based on the Address, the Calling Party Name, or the phone number of calling party.



#### Attachments Tab

The **Attachments** tab allows you to attach photo and document files to the call record.



**Note**: For more information on adding **Attachments** refer to "Attachments" on page 67.

#### Call List

Once all the appropriate information is entered within the **Call for Service**, the call appears in the *Call List*, usually at the top of the list.



#### Edit, Take, View Calls

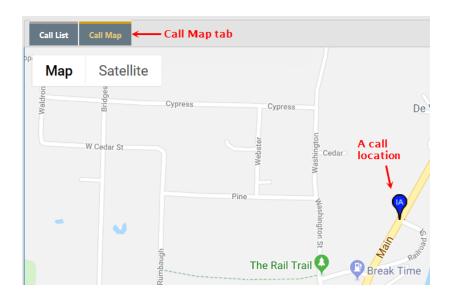
Under the Actions column you can edit, take, or view calls.

- Edit: Indicates that the Call is in progress and assigned to an officer.
- Take: Indicates the Call is in progress and has NOT been assigned to an officer. Click it to take ownership of the call.
- View: Indicates the Call is complete.

**Note**: Dispatchers can edit or view another dispatcher's call they have started. This is a permission that needs to be requested in the application to allow another dispatcher to take ownership of the CFS and edit it.

Note: Officers can be dragged and dropped from the Call Officer grid to the Edit Call tab.

The **Call Map** tab displays a map with the call locations.



#### Clear, Dispatch, or Mark Call as OnScene

With the appropriate permissions, you have the ability to **Clear**, **Dispatch**, or mark an officer **On Scene**, directly from the **Call List**.

Click on the plus (+) sign on the left of the call to display officers that are assigned to the call, if any. The plus (+) sign changes to a minus (-) sign with information displayed directly below.

Calls that do not have an officer assigned have a *Dispatch#* with a red-orange background.



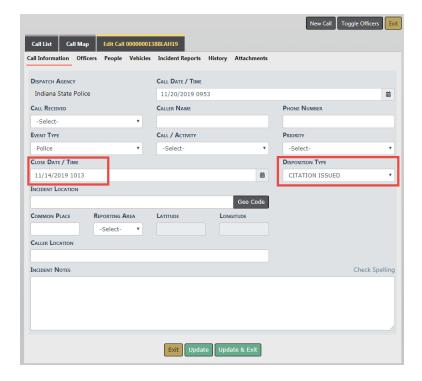
Click the **Dispatch** button to dispatch the officer, click **On Scene** to mark the officer as on the scene, or click **Clear** to clear the call. The current date and time replaces the button on the screen.

#### Close a Call

When the officer is finished with the call it is now time to close out the call and finalize. The call must first have a clear time and date associated to it.

To close the call, add the clear time, clear date, and disposition on the Edit call tab of the *Manage Dispatch* form. For more information on accessing the *Manage Dispatch* form, refer to "Manage Calls for Service" on page 168.

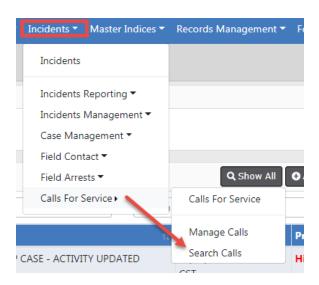
**Note**: The **Clear** time/date on the *Call List* is not the same as the **Close** time and date. Closing a call also requires a disposition of the call. For more information about the *Call List*, refer to "Call List" on page 177.



Click **Update** to save updated info and stay in Call record. Click **Update & Exit** to save updated info and exit the Call record. Click **Exit** to return to the previous screen without saving.

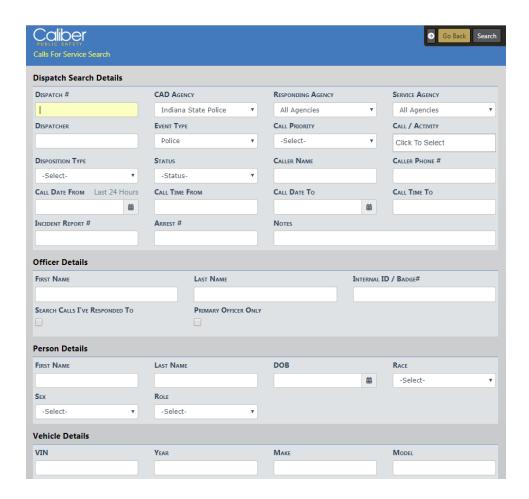
# Search Calls for Service

You can search calls by selecting Incidents from the top navigation bar, Calls For Service, then **Search Calls** option on the sub-menu.



After selecting the **Search Calls** option on the sub-menu, a *Calls for ServiceSearch* screen appears.

Calls can be searched using any criteria on the search screen. Enter the search criteria then click the **Search** button, located on the top or bottom of the screen. If you search without entering any search criteria, the results will return the most current 200 records.



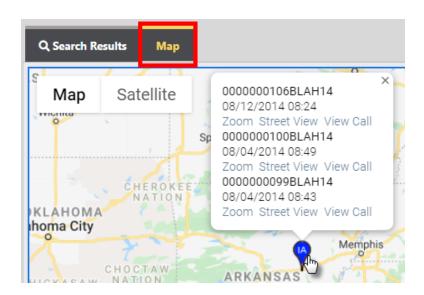
**Note**: Enter the Officer Name or Badge Number in the **Officer Details** section to only include calls based on the primary officer assigned.

Calls can be viewed, printed, or shown on the map.

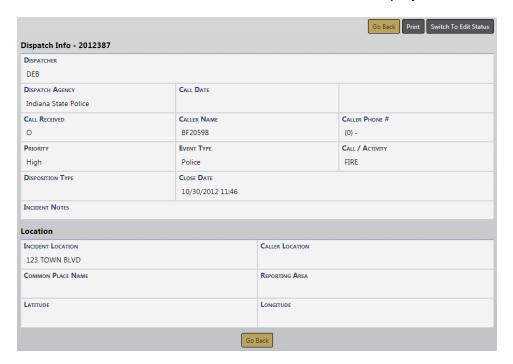


Select the **Show Map** button to open a new tab displaying the current search results on a map.

- Only calls with a service address that is GEO-coded display on the map.
- Click on any pin on the map to open a pop-up window to display basic all times.



Click on the **View** icon in the *Actions* column to display the call detail.

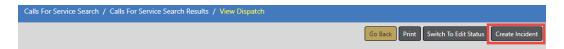


Scroll down to view additional call details.

Click the **Print** button to print.

If applicable, click the **Switch to Edit Status** to edit the call. For more information on editing a call, refer to "Edit a Call" on page 171.

If your agency is setup to integrate calls from Caliber CAD and you have appropriate permissions, a **Create Incident** button appears if the CFS record integrated from Caliber CAD without an Incident Report assigned.



You must have access to create Incident Reports and a role with one of the following permission categories:

- Calls for Service Create Incident From My Calls
- Calls for Service Create Incident From My Agency Calls

Click the **Create Incident** button to create the Incident Report.

**Note**: CFS records that integrated from Caliber CAD include person and vehicle data from the CAD Call for Service event; this applies only to agencies using the Online RMS CFS module and sites with an active CAD Interface.

**Note**: Warrant information displays only if your agency is using the **Warrants** module.

# **Chapter 12.Incidents**

# **Incidents Overview**

Incidents Reports can be created in Online RMS manually, or integrated from Caliber CAD for Agencies with an active Caliber CAD interface.

The *Integration Interface* transfers Caliber CAD call information to the Online RMS **Calls For Service** module and initiates an Incident Report for the responding unit, linking the Caliber CAD data to the report.

Beginning with Online RMS 11.7.0, you can create a Field Arrest and import data from an incident or Calls for Service into the arrest record to avoid unnecessary data entry.

Note: If the CFS module and integration is turned on, and the integration process cannot match people that exist on the CFS record with RMS, the unmatched names appear on the Names tab of the Incident Report. With appropriate permissions, you have the option to add unmatched people to the Master Index in RMS, then associate them with the Incident Report. For details, refer to "Names Tab" on page 215.

- Incident Reporting includes the following activities:
  - Create New Incident Report manually, or by integration from Caliber CAD, if applicable.

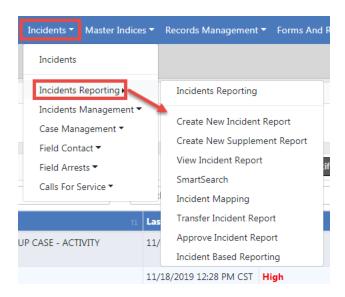
**Note:** The *Wizard* leads you through each section of the incident report to help you fulfill the system requirements for a valid incident report. The *Wizard* can be turned on and off, but you should leave it on to help ensure that you complete required information. This practice helps to prevent problems with validation at the end of the incident creation process.

- Create Supplement to Incident Report
- View Incident Report

Note: With appropriate permissions, investigators can create a case on an initial unapproved Incident to begin working on an investigation without

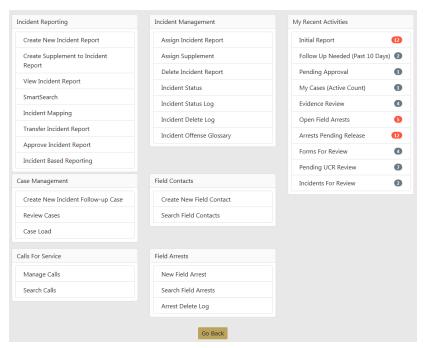
waiting for Incident approval. Refer to "Create a Follow-Up Case" on page 443 for details.

- SmartSearch
- Incident Mapping
- Transfer Incident Report
- Approve Incident Report. (Available with proper permissions.)
- Incident Based Reporting (Available with proper permissions.)
- You can access these features from the Incident Reporting sub-menus. Click Incidents on the top navigation bar, then click the Incident Reporting to display more options from which you can select.



Or, you can click **Incidents** on the navigation bar, then click **Incidents** again to display all Incident options. Click on an option to access that module.





Note: Items that appear are based on permissions and vary by user.

# **Top Buttons**

The **Incident Report** contains various buttons that enable the user to *Pin Incident, Exit Report*, *Quick Print, Print, Transfer* the report to a different user, *Show* or *Exit* the *Wizard*. The *Submit for Approval* button remains inactive (gray) until the components of the

report are completed appropriately and the report is ready for review by an officer supervisor or CID supervisor.



The top buttons appear regardless which tab the user is on.

While viewing or editing an incident record, you can *Pin* it to your Home Page for quick reference.

To *Pin*, click on the green **Pin Incident** button located on the top left of the page while on the *Summary* tab; the button color then changes from green to gold and the label changes to **Unpin Incident**.

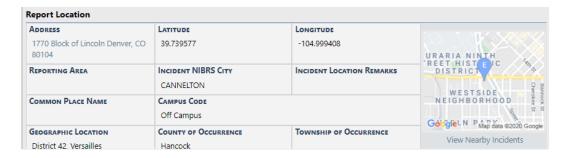


To *unpin*, click on the gold **Unpin Incident** button.

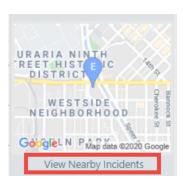
For more information on pinned records that appear on the Home Page, refer to "Home Page " on page 8.

# **Google Maps Integration**

**Google Maps** appears on the *Summary* tab of the Incident, showing the location of the report location when a latitude and longitude are associated with the address.



Click on the View Nearby Incidents link to view incidents on the map.



# Incident Report - Requirements And Rules

#### **General Requirements:**

There are four (4) minimum requirements before a report can be submitted for approval:

- Report/Occurrence Dates and Times
- Report Location
- Reporting Officer
- Narrative

Additional validation requirements may exist such as Media Crime Summary, Incident Types, Reporting Area, and Completion of Custom Form started within the Incident.

Additional validation requirements will be driven by any Offenses added to the report and possibly Custom Fields created by the agency.

Information entered on the Incident saves automatically as it is selected for the report. The Narrative auto saves every 60 seconds as the user is creating it.

#### **Cross-tab Validations:**

Online RMS 11.8.0 and above expands features for states that need to satisfy unique NIBRS requirements. Such as allowing Rules and Validations on the Incident Offenders and Victim tabs in addition to the Incident Header and Incident Offense tabs, a more comprehensive selection of custom fields, and the ability to configure validation rules across tabs.

For example, suppose your state has particular IBR reporting guidelines requiring you to supply specific Incident Offender data when the victim is older than 17. Then, with help

from Caliber staff, your agency can add a validation rule to a custom field on the Incident Offender tab requiring the user to supply that information when the victim is older than 17.

#### **Incident Rules:**

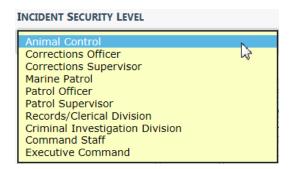
- The Initial Report is designated as "Supp# 0" and Supplements are then added in sequential order (e.g., Supp. # 1, 2, 3, etc.).
- A user can submit another report owner's Incident.
- Incidents can be edited when in *Initial* or *Disapproved* status, otherwise will result in a Supplement.
- Incidents that have been Approved can only be Supplemented.

Field Arrests, Field Contacts, Citations, and Warrants can be associated to an **Incident Report** within the **Summary** tab of the report.

Associated CAD information can be found within the **Header** and **Summary** tabs in the **Calls For Service** section.

# Incident Security

Incident Security uses a hierarchical design. A user account is assigned incident security based on general rights to view the details of an incident report. **Animal Control** is the lowest incident security level and **Executive Command** is the highest incident security level.



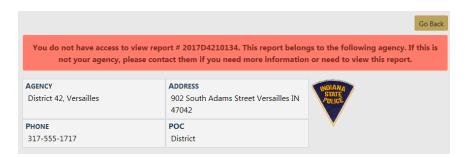
Incident Security applies to each individual Incident Supplement. In addition to the security level, there are also security control to restrict to *Agency Only* and for *Security Groups*.

The default security for Incident Reports is set at the *Patrol Officer* level. This means users with *Patrol Officer* security rights can:

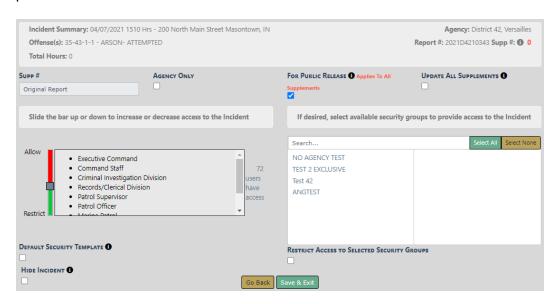
- View Incident Supplements having a security level of Patrol Officer or less.
- Cannot view Incident Supplements having a security level greater than Patrol Officer, unless the user is added to a security group assigned to the Incident Report.

It is understood that some Incident Reports will be of a more sensitive nature and may require a higher security level to minimize the number of users that have access to the report.

Users without the proper security level receive an access denied message when selecting an Incident report.



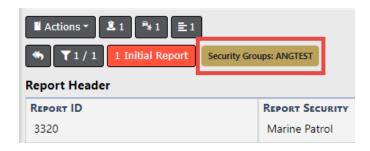
The security of an Incident Report can be set by clicking on **Change Security** button from the **Incident Approve/Disapprove** screen when supervisors approve the supplement.



 Agency Only - Check this box to restrict the Incident Report to users at your agency only.

- For Public Release Deselect this box to print NOT FOR PUBLIC RELEASE across the top of the Incident report. This button is active (green) by default.
- Update All Supplements Check this box to update the security on all Supplements.
- Incident Security Levels Set the Incident's security level at a level equal or less than
  his or her security rights. This means other users at that level or above would have
  access to the report across all agencies (unless the Restrict to Agency Only is selected).
- Security Groups Available security groups can be selected which will allow any user
  in the selected group to have access regardless of their individual security level. If
  Restrict Access to Selected Security Groups is checked, the Incident report can
  only be accessed by members of the selected Security Group.

**Note:** If access is restricted to the selected security groups, a message appears on the summary tab of the incident indicating which security groups have access.



- Default Security Template This option allows the user to set one supplement as the default security template. All future supplements added to the Incident inherit the same security level.
  - When the Hide Incident box is selected, the Default Security Template box will automatically be selected when you save changes.
- Hide Incident Check this box to mark the Incident as hidden. Hidden Incidents can
  only be seen by users who meet the security requirements, and are in the same
  agency as the Incident. An exception is if the user is part of a security group set for
  one of the supplements.

**Note:** This option is only available to users who have both the hidden permission and full access to all supplements.

 Hidden Incidents do not appear in searches, nor in other Online RMS modules that lists associated incidents, such as field arrest, warrants, visualization tool, citations, field contacts, evidence, etc., unless the user meets security requirements as stated above.

 When you check the **Hide Incident** box, the **Update All Supplements** checkbox is automatically checked and disabled to ensure the security on all supplements are identical.

The **Incident Security** screen can also be accessed at any time through the **Incident Status** screen by clicking on the **Security** icon .



You can access the **Incident Status** screen from the *View Incident Report* screen, or from the *Incident Report* menu. For more information on accessing the *Incident Report* menu, refer to "Incidents Overview" on page 185. For information on changing the Incident Status, refer to "Changing Incident Status" on page 273.

# **Incident Report - Report Validations**

The Online RMS program has a built-in **Wizard** that guides you through the creation of the **Incident Report**. Navigational buttons are displayed to navigate through the report. The use of the Incident **Wizard** is highly recommended.

National Incident-Based Reporting System (NIBRS) validations use tab indicators to assist the user in entering all required information. The required information may change depending on the offense(s) added to the report. A tab that lists NIBRS validation information displays on the **Incident Validations** tab.



The **Incident Validations** tab lists any missing required information to assist you. Click on any of the validations listed in **Incident Validations** to return to the area within the report to add or edit data. Once all the minimum required information has been entered, the report can be submitted for approval.

Click the **Exit Wizard** button to view and edit the report in **Form Mode**. This mode allows you to navigate through the necessary tabs in any order without following the linear style used in the **Wizard** mode. Navigating to the **Summary** tab, or clicking on the tabs instead of the navigational buttons, may also cause you to exit the **Wizard** mode. Click the **Show Wizard** button at the top of the page to return to **Wizard** mode.

**Note**: The **Wizard** mode is only available when editing a Supp 0 incident.

# **View Incident Audit Trail**

Another valuable security tool for the Investigator is the **View Incident Audit Trail** feature. Information is captured anytime someone accesses an incident report. If you suspect another user is accessing or attempting to access an incident report set above their security level, you can view these access attempts.

To view the audit entries, select *View Incident Report*. When the correct report is located and selected, select the **Actions** button, then **View Incident Audit Trail** menu option

Caliber Public Safety Chapter 12. Incidents Online RMS11.11



Anyone who accesses or attempts to access the Incident Report appears in the Audit History.



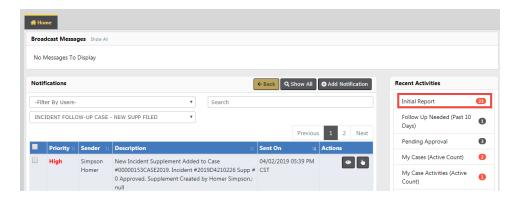
# **Create Incident Report**

The Incidents module is where you input, retrieve, and edit professional law enforcement reports. Create reports step-by-step using the **Incident Report Wizard**. Each report is validated against state or federal guidelines which are driven by any offense(s) entered on the report.

Depending on your agencies configuration, incidents may be created manually or automatically via the **Caliber CAD** interface. Mobile users may also have access to generate a report in CAD using **Caliber Mobile**.

**Incident Reports** generated by **Caliber CAD**, or other CAD system through a system interface, will contain information generated by CAD or imported through the CAD interface.

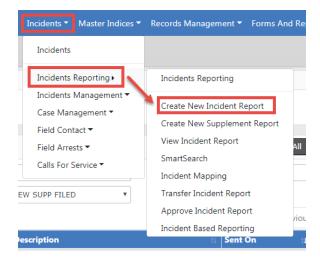
Once logged into Online RMS the Home Page displays. You can edit the CAD generated Incident from the *Recent Activities* section under **Initial Report** by clicking on the number to the right.



**Incident Reports** generated by the *Calls For Service* module contain the call dates and times in the **Header** tab. When you log into Online RMS, you can edit the CFS generated Incident from the *Recent Activities* section under **Initial Report**. These calls can be searched using the *Calls for Service* module. The associated call will show in the **Header** and **Summary** tabs of the **Incident Report**.

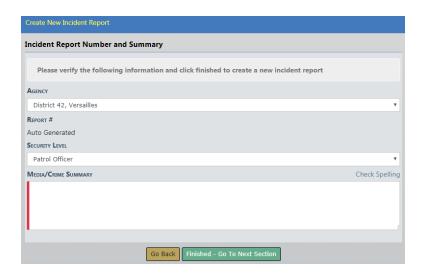
Incidents created manually by officers will use the following workflow:

The Create New Incident Report feature is located in the Incidents menu under Incident Reporting.



This allows you to create a report using your agency's numbering format. Some agencies will use *Automatic Number Generation* where the Incident report number will be populated automatically, and some agencies will have the opportunity to manually enter the report number based on the agency's business practice.

Caliber Public Safety Chapter 12. Incidents Online RMS11.11



Select the Security Level, if different than the default.

Enter the Media/Crime Summary, and optionally click *Check Spelling* to validate and correct any spelling errors.

Click **Finished - Go To Next Section**. The wizard steps you through each tab, one at a time.

# **Incident Report Tabs**

- Summary tab-provides a summary of all the information entered on an incident report.
- Header tab- captures the dates/times, report location, and reporting officer(s), associated arrests, and associated calls for service for the incident.
- Offenses tab-captures any and all offenses associated with the report. Validations are offense driven and will alert the user of necessary information.
- Names tab-captures Offenders, Victims, and Other Incident Names such as witnesses who are associated with the report.
- Property & Vehicles tab-captures applicable property or vehicles associated with the report. Evidence is also created in this section (See Incident Evidence section for a detailed explanation).
- Narratives tab-captures the users narration of the details surrounding the incident.
   You can insert an image directly into the body of the Narrative.

- Attachments tab-captures an incident related attachments such as crime scene photos or statements. Forms such as the Marijuana Eradication Form can be completed in this section also.
- Validations tab-does a final check of your report to ensure the minimum requirements are met based on the offense(s) entered on the report.

**Note:** With appropriate permissions, you can *Pin* the Incident while on the Summary tab to add it to your Home Page for quick reference. For more information, refer to "Incidents Overview" on page 185.

#### Header Tab

Regardless of which method is used to initiate the report, the following workflow is the same for editing and completing a report; the only difference you may see is pre-populated information from CAD or Calls For Service module.

The **Header Tab** contains 3 separate sections: *Report Types & Times, Location*, and *Officer*. By using the **Wizard** the sections are completed in the listed order, though the use of the **Wizard** is not required.



Click on each button to access that information.

#### **Report Types & Times**

The *Header Information* area includes Report Security, For Public Release, Report Agency/District, the Media / Crime Summary box, Incident Report Types, Report Date, Occurrence Date Start, Incident Classification, and other information.

### Report Security

Select the Incident Report security level.

#### For Public Release

This field defaults to **Yes**. Change this value to **No** if this Incident should not be public. Hover over or click on the information bubble for more information.



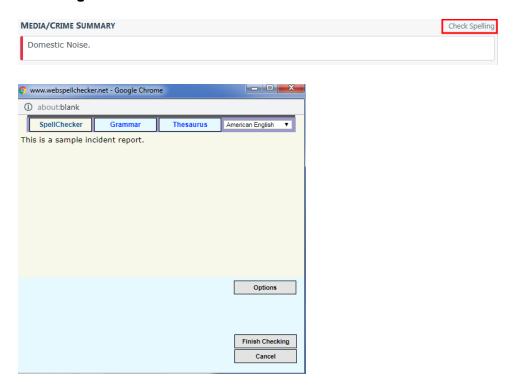
### Report Agency/District

Select the **Change** button to change the listed reporting agency. You must have proper permissions to access this function.



# Media/Crime Summary

The Media/Crime Summary is designed to enter a brief description of the Incident. After entering a description, optionally select **Check Spelling** to open the *WebSpellChecker* window. When finished checking your entered text, select **Finish Checking**.



### **Incident Report Types**

The Incident Type selection box is designed to categorize the general nature of the incident. Multiple selections may be selected to cover all applicable types that

occurred during the incident. Incident Type is a searchable field when searching for incidents.

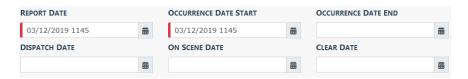
Click into the box and select all the applicable Incident Report Types from the provided list.



Click on the X to remove a selected type from the list.

#### **Incident Report Dates and Times**

The Incident Report Times area contains the various times associated with the incident, Report Date, Occurrence Date, Dispatch Date, On Scene Date and Clear Date. These incident date(s) and time(s) may be completed in Incident Reports generated by Caliber CAD or by the Calls For Service module but they still need to be verified by the user for completeness and accuracy. Editing is permitted as needed.



You can click on the date icon on the right of each date field to select a date and time, or type T in the field then tab out to return the current date and time.

#### **Additional Information**

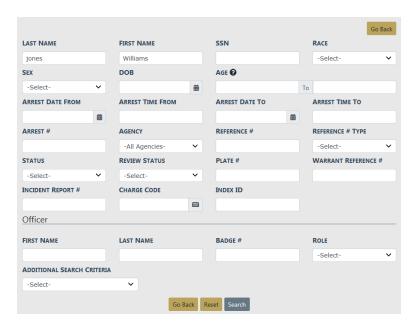
Complete the Additional Information section as needed.

#### Field Arrests and Calls For Service

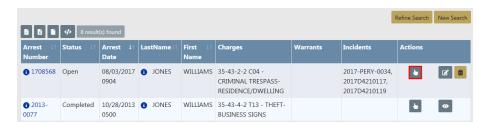
Click on the **Add Field Arrest** link to associate a Field Arrest to the Incident, if applicable.



Enter the search criteria in the *Field Arrest Search* form to locate the Arrest record, then click the **Search** button.



Click on the Select icon in the Actions column to select the appropriate record in the Search Results window.



In the Associate Dispatches window, select the **Calls for Service** records to associate with the Incident, if any. Then click **Save** to associate the records, or **Close** to ignore the request.



If you chose to associate the **Calls for Service** records, the Associate Incident form appears. Select all specifics that apply, then click **Save**.

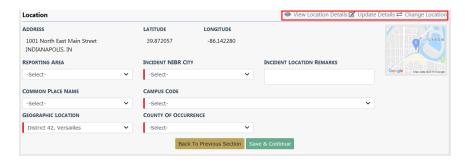


The data then appears in the Arrest and Calls for Service sections.

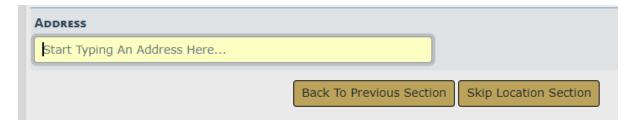
Click the **Continue** button to progress to the *Report Location* tab.

#### Location

The Location is completed by selecting the geographic location, county of occurrence, township (if applicable) where the incident occurred. The incident address is also added on this screen by utilizing the Master Indices. There are three options available on this page: *View Location Details*, *Update Details*, or *Change Location*.

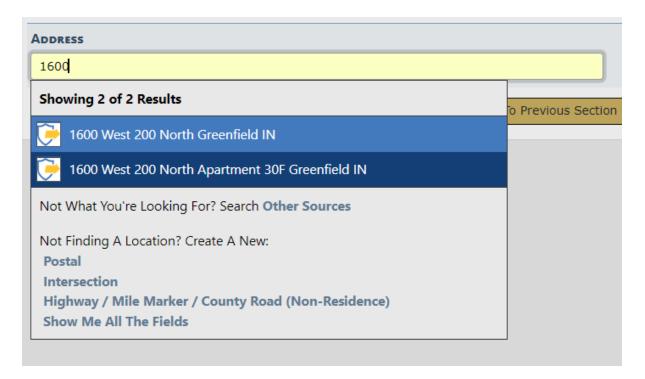


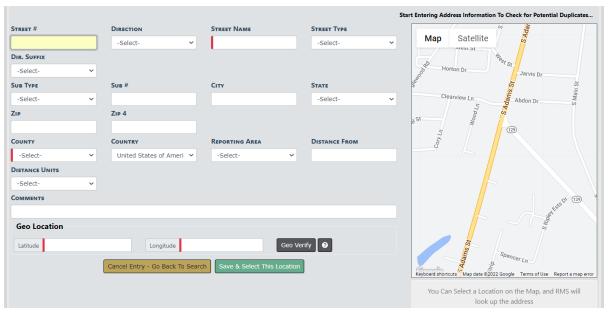
If no Location exists, type in the provided field to supply one. (This is the same screen you will see if you select **Change Location** in the previous screen.)



Beginning with RMS 11.10, location search is greatly enhanced. Begin typing the address and the system will return RMS locations. If your agency has Google Places turned on, you will also see Google addresses. Links will appear that allow you to add addresses and/or interact with a map for location identification.

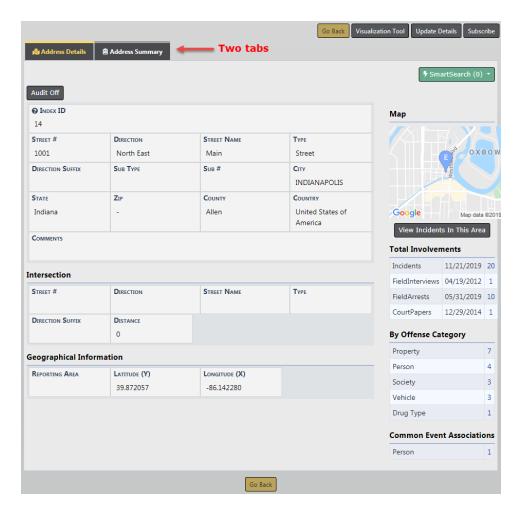
Caliber Public Safety Chapter 12. Incidents Online RMS11.11

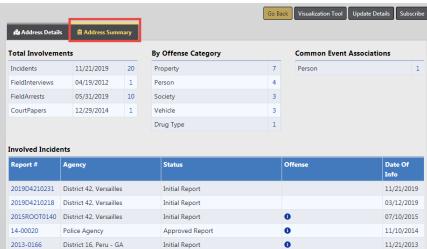




#### **View Location Details**

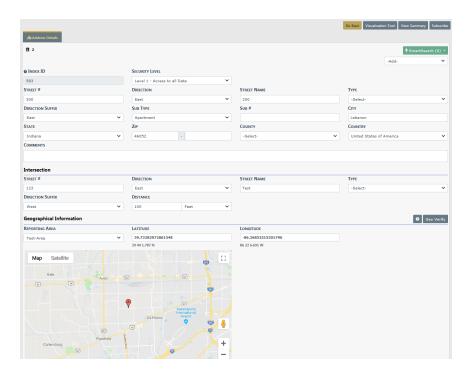
This displays two tabs, *Address Details* and *Address Summary*, that lists all involved incidents tied to this location, and details about the location itself.





## **Update Details**

Update Details allows you to update the details of the location.



## **Change Location**

Change Location allows you to change the location, address of the Incident. You may also add an address to the Master Index if it doesn't already exist.



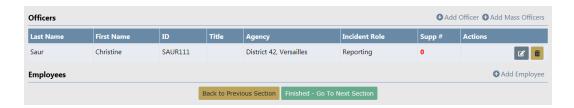
First search for an existing address to determine if the address already exists before adding a new one. It is recommended that you search by individual fields rather than the *Quick Search* field. See "Adding Address" on page 107 for further instructions on adding addresses to the Master Index.

If adding a new address, click the **Save and Select** button. This saves the address to the Master Indices and selects the record for the report.

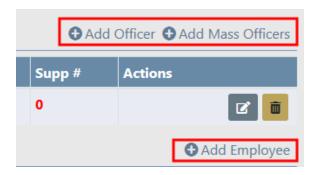
Click the **Save & Continue** button at the bottom of the window to advance to *Officers*.

#### Officers

The Officers section is where all officers and employees involved in the incident are listed. The officer creating the report will default as the *Reporting Officer*.

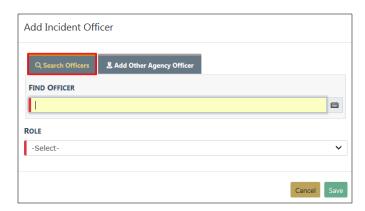


Click the **Add Officer**, **Add Mass Officers**, or **Add Employee** hyperlink to add additional officers or employees.



#### **Add Officer**

Use this link to add one officer at a time. Begin entering the officer name in the **Find**Officer field to display a list of names that match the entered text, then click the appropriate name from the list. Select the **Role** from the drop-down list.



**Note:** All Supplement reports must have a *Reporting Officer* associated with the report.

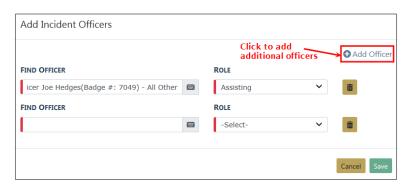
Select **Add Other Agency Officer** to add officers from other agencies. These are officers who are not Online RMS users within the current schema.



Click **Save** to add the officer to the Incident.

#### Add Mass Officers

Use this link to add multiple officers at one time. Begin entering the officer name in the **Find Officer** field to display a list of names that match the entered text, then click the appropriate name from the list. Select the **Role** from the drop-down list. Click **Add Officer** to add another officer, and repeat until all officers are included.



Click Save to add all selected officers to the Incident.

### Add Employee

Use this link to add an employee to the Incident. Begin entering the employee name in the **Find Employee** field to display a list of names that match the entered text, then click the appropriate name from the list. Select the **Role** from the drop-down list.



Click **Save** to add the employee to the Incident.

Click the Finished - Go To Next Section button to advance to the Offenses tab.

### Offenses Tab (Mass Offense Entry)

Upon completing the three sections of the **Header Tab** you are then taken to the **Offenses Tab**, where you enter any applicable offenses for the incident report.

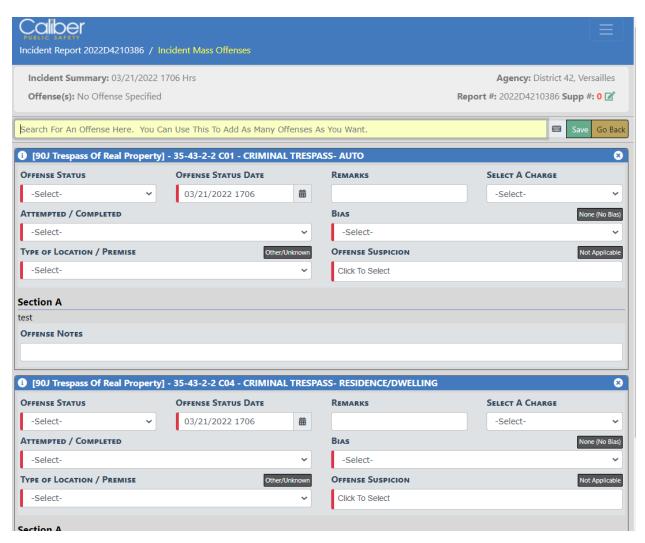
If no offense was committed during this incident, select the **Skip Offense Section** and you are taken to the next tab of the report, the **Names** tab. This ability to skip the offense section allows for the agency to create incidents for recording non-criminal incidents (accidents, civil matters, ordinance violations, etc.).

You may enter one offense at a time for an incident, or add multiple offenses at one time. If you wish to add offenses one at a time, refer to "Offenses Tab (Single Offense Entry)" on page 211.

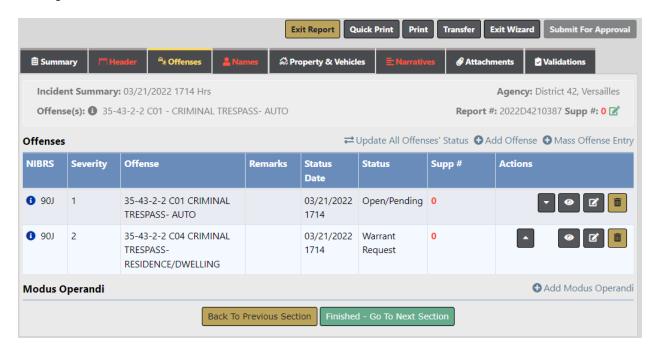
To add multiple offenses for the same incident, begin by entering text into the **Offenses** field, which will cause offenses to autofill with matching options. Select the offense you wish to add by clicking on the entry from the drop-down menu, which will cause the offense to appear below. (Details added in, say, the first offense will filter down to the other offenses in the mass entry.)



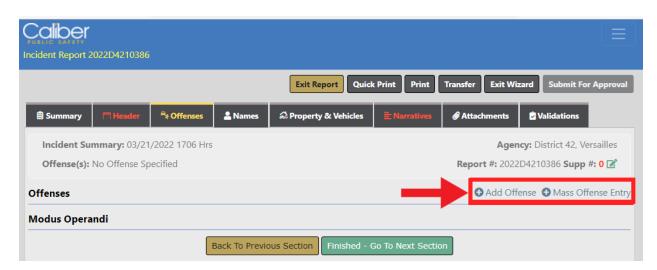
You may repeat this process to add multiple offenses to the incident, then fill out the required fields for each individual offense as needed. When you are finished adding offenses and making selections from the fields for those offenses, click the **Save** link.



Saving the offenses will add the offenses to the incident.



If you have the necessary permissions to edit an incident, you may add additional offenses individually or as a mass of offenses. Select either **Add Offense** (to add an individual offense to the incident) or **Mass Offense Entry** (to add multiple offenses to the same incident.

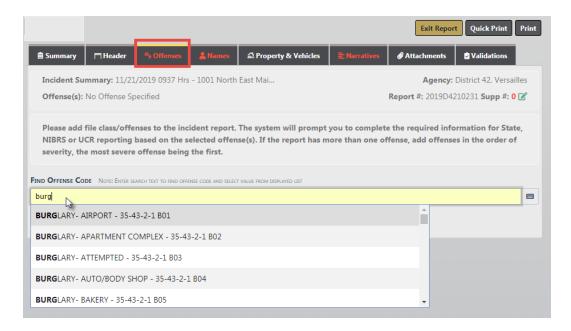


## Offenses Tab (Single Offense Entry)

To add a single offense when adding an incident, begin by selecting the **Use Single Offense Entry** link at the bottom of the **Offenses Tab**.



You may now enter text into the single-entry **Find Offense Code** field and select a value from the displayed list. If the offense you entered is not found, refine your search text and the results will refresh as well. If the offense is still not located, contact your agency administrator.



If your agency administrator relates an offense to one or more Incident Types, the offense requires at least one of the related offenses on the Incident Report when that Incident Type is added to an Incident Report.

In this case, a **Quick Select Report Type Offenses** link appears on the Offenses tab.



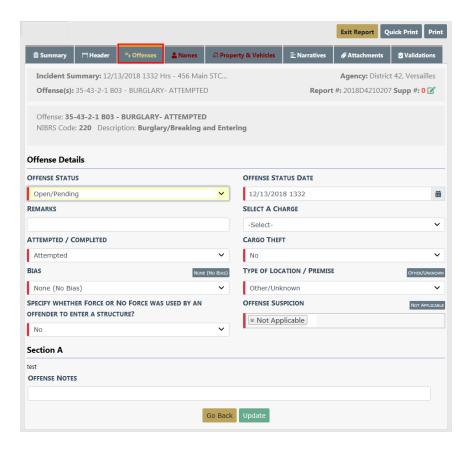
Click the link to open a dialog box that lists the offense(s) from which to choose. You can filter by Incident Type by selecting from the list. Only one offense appears in the below example for illustration purposes.



If you do not choose a related offense, a notification appears on the Validations tab.



Once the offense has been selected, the system will display the **Offense Details** . This screen is used to describe the status of the offense and collect information related to state reporting guidelines.



Select the appropriate answers about the offense by using the drop down menus or multi-select menus provided.

Click on **None**, **Unknown**, and **Not Applicable** buttons to quickly enter that selection into the field, when applicable.



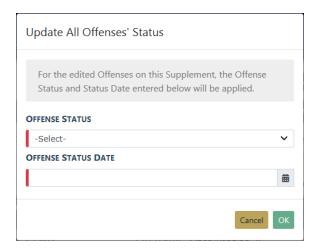
After the mandatory questions have been completed, select the **Save** button, which will then take you back to the **Offenses** tab for review.



Hover your mouse over the information bubble 10 to the left of the NIBRS code to view the NIBRS Crime Description.

Additional offenses may be added by clicking the **Add Another Offense** hyperlink and repeating the same process.

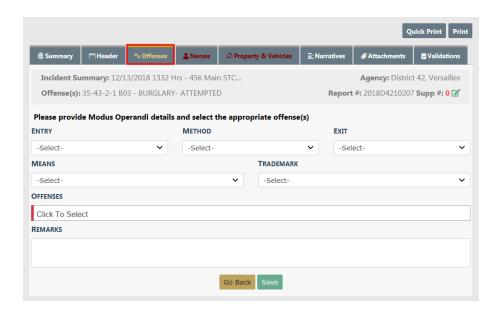
Click on the **Update All Offense's Status** hyperlink to update the offense status and status date on all edited offenses on the Supplement.



Select the Offense Status and enter the Offense Status Date, then click OK.

Depending on the offense(s) selected on the Incident, certain tabs may turn red. This indicates that additional information in those tabs is needed to validate the state reporting requirements for the agency. Placing the mouse pointer over the red tab displays a pop-up window displaying the required information.

Optional **Modus Operandi** information can also be added at the bottom of the page. Clicking the **Add Modus Operandi** link will display the **Modus Operandi** page where entry, exit, method, means, and trademark information can be added and associated to one or more of the offenses listed on the report.

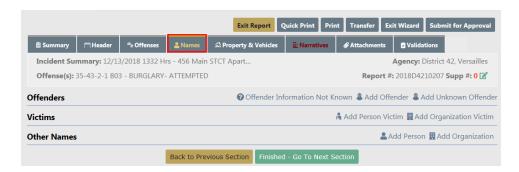


Click Save after entering or selecting all required fields on the Modus Operandi page.

Click the Finished - Go To Next Section button to advance to the Namestab.

#### Names Tab

The **Names Tab** contains the list the names of all persons and organizations involved in the incident. The names section is broken into three sections, the *Offender*, *Victim*, and *Other Names*.



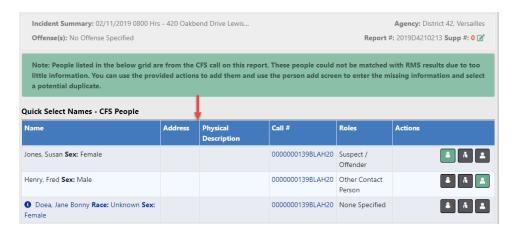
Agencies using Caliber CAD and entering person contact data, the Person Name data is automatically added to the incident report in Online RMS without user action using one of the following criteria:

 Person exact match. Caliber CAD CFS Contact Type matches Online RMS involvement role.

- Person is added to the incident report Offenders, Victims, or Other Names section automatically without user action.
- Person exact match. Caliber CAD Person Contact Type is not provided nor matches Online RMS involvement role.
  - Person is added to Master Person Index automatically without user action. Use
     Quick Select Names CF People option to add person to incident report.
- No Person exact match.
  - Use Quick Select Names CFS People option to create the master person index record and add to the incident report.

#### **Quick Select Names - CFS People**

If the CFS module and integration is turned on, and the integration process cannot match people that exist on the CFS record with RMS, the unmatched names appear in this section of the **Names Tab**. With appropriate permissions, you have the option to add unmatched people to the Master Index in RMS, then associate them with the Incident Report.



Click the appropriate icon in the *Actions* column to add the name as an Offender, Victim, or Other Person. Hover your mouse over each icon for a description of what the icon does.



**Note:** A green icon suggests the Recommended Action based on the CFS Contact Type/Involvement Role. For example, if the *Add as Offender* icon is green, that is the recommended action.

**Note:** Names appearing as black text, lack unique person identifiers required to match to or create a new master person index record.

After clicking the appropriate icon, the **Add Person** screen appears. Fill in the appropriate information then add and select the person. When adding a new person record, the system notifies you if there are potential duplicates.

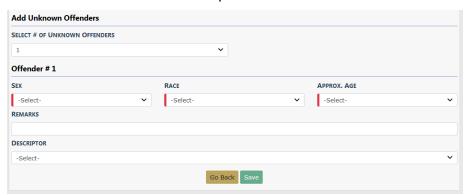
For more information, refer to "Adding Person" on page 97.

### Offenders Section-Adding Unknown Offender(s)



#### Add Unknown Offender

Selecting the **Add Unknown Offender** hyperlink prompts you to list the number of unknown offenders by using a drop down menu. Once the number of unknown offenders is selected, add applicable sex, race, age, and description to each. *Not Known* is also an acceptable answer.



Click Save to create the Offender records.

#### Offender Information Not Known

Selecting **Offender Information Not Known** enters one *Unknown Offender* record as a place holder, allowing you to return and update the record when details are known.



The **Offender Information Not Known** hyperlink only appears when an Offender record is nonexistent.

#### Offender Section-Adding Known Offender(s)



If the **Add Offender** hyperlink is chosen you are taken to the **Master Indices Person Search** screen.

You can select person records for the incident report three ways:

- Search by entering your own criteria, then select from the search results list.
- Create new master person record and add it to the incident report.
- Search for a person that exists on a CFS record that is associated to the incident report, if applicable, then select from the search results list. An Associated CFS Available link appears if the incident is associated to a CFS record.

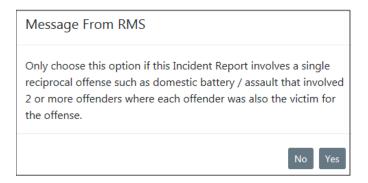
For more information on searching, selecting, and creating *Master Person* records, refer to "Master Indices" on page 81.

**Note:** Always search for *Master Person* prior to adding a new record. Search as broadly as possible to yield more results, then Refine Search as necessary to narrow the search. This will help to prevent Master Indices duplicate records for the same Person, Address, etc.

Once all information has been added to the person record, click the **Select** button to continue to the next screen to add additional NIBRS/UCR related information for that person.

 When finished updating the offender information, and if the Field Arrest module is turned on and role of arrestee has been added, you receive a prompt asking if you would like to create a Field Arrest for this offender. Click **No** to return to the Incident without creating the Field Arrest, or click **Yes** to create the Field Arrest. For more information, refer to "Names Tab" on page 215. No matter what you choose, the process creates the offender record and adds it to the Offender section of the Incident.

If you select the box indicating that the Offender was also a victim of the offense, you are asked to confirm. Select **Yes** to confirm.



Select the **Save** button to return to the **Names** tab where the person will appear added to the Offender Section. If the offender was also a victim, the name is also listed under the victim section. Add additional offenders if applicable.

#### Offender Section-Create and Edit Field Arrest

If the Field Arrest Module is turned on for your agency and you have appropriate permissions, you can create a Field Arrest and import incident data into the offender's arrest record using one of the following methods:

Click on the Add Field Arrest icon next to the offender's name when it exists.

Select the items you want to import from the list that appears then supply any necessary information from additional fields that appear based on your selection.

Click Yes when asked to confirm the creation of the Field Arrest.

The *Edit Field Arrest* form opens. Update the Field Arrest as needed and click **Update**. For more information on updating Field Arrests, refer to "Edit Field Arrest" on page 353.

Click Go Back to return to the Incident Report.

The **Add Field Arrest** icon changes to **Edit Field Arrest**. You can now edit the Field Arrest while on the Names tab of the Incident.

 Click the Add Offender link to add an offender to the Incident and role of arrestee has been added. After you finish adding the offender information, a prompt appears asking if you want to create a Field Arrest for this offender.



Click **Yes** at the prompt, then follow the steps in "Create Field Arrest from Incident" on page 263

## Incident Victim(s)

Society crimes will default **Society** as the victim.

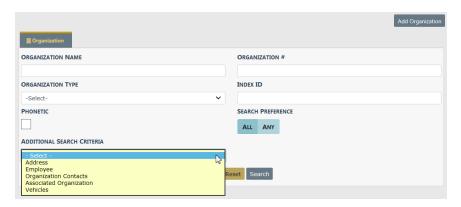
Persons and Organizations can be added to the Incident following the same process used to add a Known Offender. For details on adding a Known Offender refer to "Offender Section-Adding Known Offender(s)" on page 218.

At the bottom of the screen is an optional area where you can note Victim Rights Notification information if applicable.

Click **Continue** to return to the names tab where the person added can be seen. Add Additional victims in the same manner if applicable. If no other names are needed click the **Finished – Go To Next Section** button to proceed to the **Property & Vehicles** tab.

#### Adding Organization as Victim

Select the **Add Organization** hyperlink to advance to the **Master Indices Organization Search** screen. Search for the Organization they need to add to the report as a victim.



**Note**: Always search the Master Indices prior to adding a new record.

Search as broadly as possible to yield more results then Refine Search

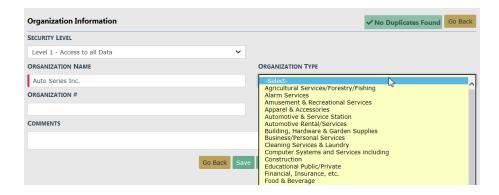
as necessary to narrow the search. This will help to prevent duplicated records for the same Person, Address, etc. in the Master Indices.

The search results display either a list of organization names meeting the search parameters or will indicate that there were no results found.

If the desired organization is listed, you can select the existing record as the victim for the report. Best practice is to review the information by clicking on the Organization Name or Index ID to review the information and verify it is up to date prior to selecting the record for the report.

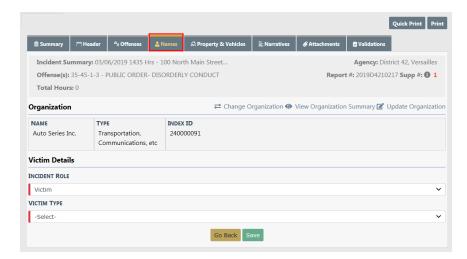


If the organization does not already exist in the Master Indices, select **Add Organization** to add the new record. Enter the Organization Name and Type fields then click **Save**, or click **Save & Select** to save and add to the Incident. Add additional known information such as the organization's address, phone number, employee information, and attachments.

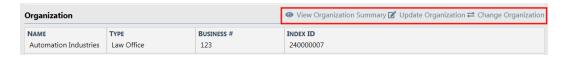


With proper permissions, you can select the **Security Level**. For more information, refer to "Master Index Security" on page 83.

If you are selecting an organization from the search results list, click the **Select** icon to add the organization to the report. Add additional required information regarding the organization's role, the offense(s) the organization is a victim of, and the victim type.



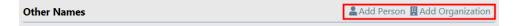
You can, with appropriate permissions, **View Organization Summary**, **Update Organization** information, or **Change Organization** by clicking on the respective links on this screen.



Click the **Save** button to add to the Incident. Add additional names and organizations for the report if applicable.

#### Other Names

Additional persons and organizations can be added to the report when applicable.



The entry of **Other Names** is performed using the same method as adding a Person, Organization, Victim, or Known Offender.

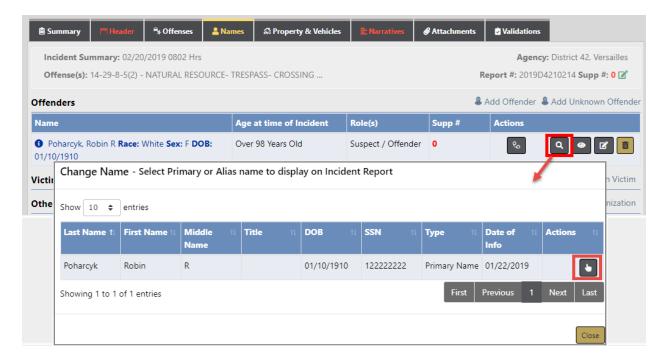
For more information on adding a Known Offender refer to "Offender Section-Adding Known Offender(s)" on page 218.

For more information on adding an Organization as a Victim refer to <u>#AddOrgAsVictim</u>.

Select the **Finished – Go To Next Section** button to proceed to the *Property & Vehicles* tab.

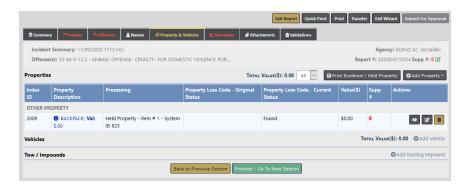
## **Changing a Name**

You can change a name from primary to alias or visa versa if you have already added a name in one or more of the name sections of the incident. Click on the magnifying glass then select a name that appears in the list.

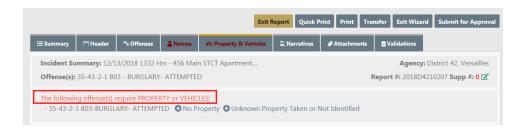


# Property & Vehicles Tab

The **Property & Vehicles Tab** contains all the incident related property and vehicles.



If there is an offense on the report that requires property or vehicle association to satisfy NIBRS/UCR validations, the tab will be red and there will be instructions on the page stating the requirement.



## **Add Property**

Click the **Add Property** button to display menu items from which to choose. You can add a single piece of property, or multiple (mass) property types listed.



There are five **Categories** for adding property: *Property, Drugs, Documents, Currency,* and *Guns.* 

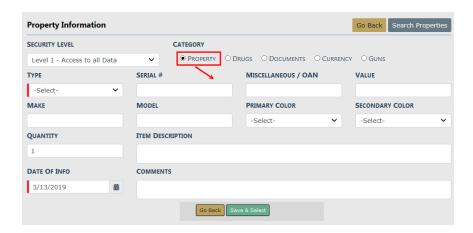
The majority of the time when dealing with a piece of property for an Incident report, the piece of property has not been dealt with by the user's agency. For this reason you are presented with the **Add Property** screen instead of a **Master Indices** search screen.

## Add Single Property

Click **Add Single Property** to display the *Property Information* screen. Select the **Category** to display additional fields to describe the property in more detail.



Caliber Public Safety Chapter 12. Incidents Online RMS11.11



Note: If you have reason to believe the piece of property you are going to enter on the report has been dealt with previously, use the **Search Properties** button to the top right, locate the existing property in the **Master Indices**, and add it to the report.

**Note**: Drug property quantities and measures may be edited through supplements that appear on the current report, but may only be edited by a user if they appear on an incident for which that user has ownership and if the QTY = 0 or UOM = Not Reported.

Enter necessary data, then click **Save & Select** to save your entry and add it to Incident Property.

#### Add Mass Entries

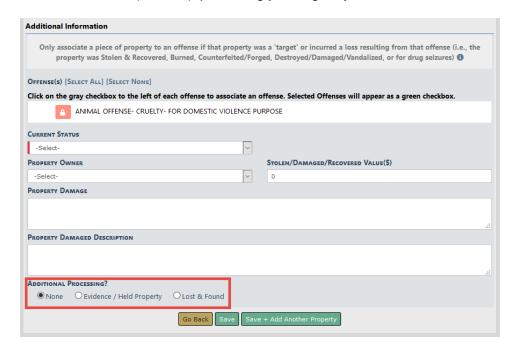
You can add multiple (mass) property types for *Property, Drugs, Documents, Ourrency,* and *Guns.* If you choose any one of the Mass options, you can add multiple property records on one screen, rather than add them one at a time.

Refer to "Mass Entry" on page 230 for details.

Note: If you are entering Mass Currency, currency should only be used when dealing with large amounts of currency where the denominations are known. For smaller amounts, use the Property category and select Cash from the drop-down list. For example, \$500 stolen from a person would be entered as Property, Cash and the description could state Miscellaneous 5, 10, & 20, dollar bills.

Enter the property information in the fields provided then click **Save** to display *Additional Information*.

You have the ability to process the property as **Evidence/Held Property**, **Lost & Found**, or **None** (neither), providing your agency elected to turn on these modules.



Note: Your agency may elect to default the Additional Processing selection based on the Incident Current Status and Property Loss Current Status. For example, if the Incident Current Status is Seized, the agency may elect to default the selection to Evidence/Held Property.

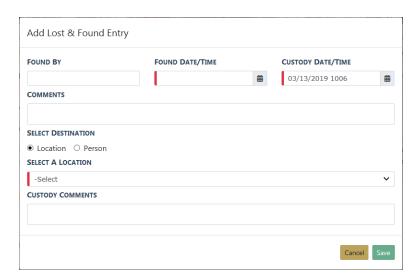
Contact Caliber Public Safety by entering a Support Ticket to request this configuration option.

If you choose **Evidence/Held Property** or **Lost & Found**, a data entry screen appears with data specific to the option you choose. You must also select a **Current Status** from the drop-down list.

**Note:** With Online RMS version 11.6 and above, your agency administrator has the option to configure which Statuses default the Processing radio button to **Evidence/Held Property**; otherwise, **None** is the default.

#### Lost & Found

The Add Lost & Found Entry screen appears after selecting the Lost & Found button.



Enter the necessary information then click Save.

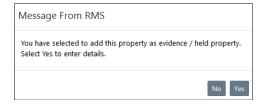
The newly entered **Lost & Found** information appears near the bottom of the *Additional Information* screen. If necessary, click on the **Edit** link to update the record.

Click **Save + Add Another Property** to save the new entry and add another property record, or click **Save + Continue** to save the new entry and display the property records.

**Note**: For information on the *Lost & Found Module*, refer to "Lost and Found Property" on page 739.

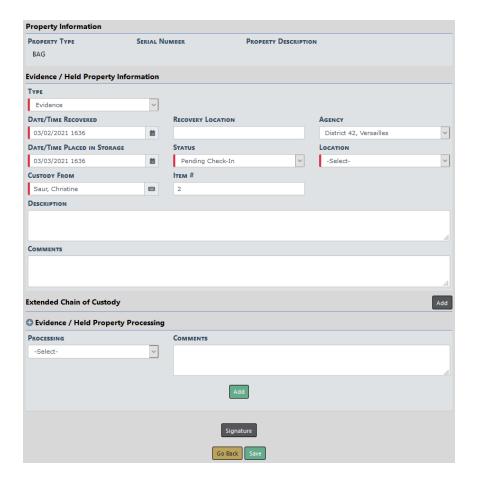
# **Evidence/Held Property**

For Evidence/Held Property, select the **Evidence/Held Property** button, select a **Current Status**, then click **Save** to display an evidence confirmation.



Selecting the **Yes** button displays the **Evidence - Held Property** screen to enter the type (evidence or held property), date and time of recovery, the location the evidence is being stored, data and time it was placed in storage, description, comments, an extended chain of custody and if the evidence needs any testing.

The Status defaults to either *Pending Check-in* or *Pending Check-in* and *Check-in*, depending on your agency setting. The Location list of values (LOV) will be filtered based on the Status and Type.



An **Extended Chain of Custody** can be entered to show if a piece of evidence was collected and transferred prior to entering the evidence. Click the black **Add** button to add one or more transfers if necessary. The **Custody From** and **Custody To** fields are tied to system users; however, you can leave one or both of these fields blank then add the data to comments.



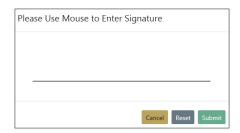
**Note**: In a multi-tiered agency the *Location* list filters based on the selected agency.

Under **Evidence/Held Property Processing** section, select a **Processing** option from the drop-down list and enter **Comments**. Click the green **Add** button to add it to the incident. Click the **plus sign** to the left of the Evidence/Held Property Processing label to add additional processing methods if needed.

**Note:** With Online RMS version 11.6 and above, your agency administrator has the option to set the *Evidence\_Processing\_Required* maintenance value to **Y** to require at least one processing record when adding evidence/held property records.



Select the **Signature** button to open the signature window.



Sign for the custody change using the mouse then select **Submit** to apply the signature.



Select the Save button.

Click on the **Print Evidence/Held Property** button to print *Labels*, *Receipts*, or *Chain of Custody* from the current screen, or print at a later time.

**Note:** For more information on printing *Labels*, *Receipts*, or *Chain of Custody* refer to "Print Labels, Receipts, Chain of Custody" on page 235.

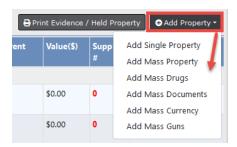
Select the **Finished – Go To Next Section** button to proceed to the next tab.

**Note**: A warning message displays to unauthorized users who attempt to remove *Property* from the **Incident Report** that is processed as *Evidence/Held Property*.

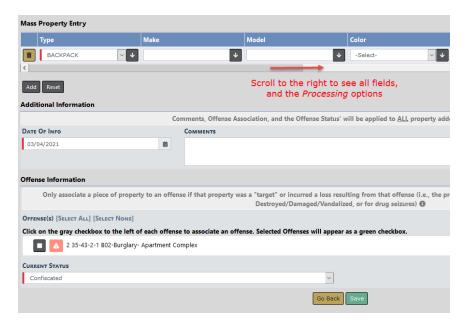
**Note**: For information on the *Evidence/Property Management Module*, refer to "Evidence/Property Mgmt Module" on page 481.

# Mass Entry

All five property **Categories** support **Mass Entry**, a form that allows you to enter multiple property records on the same screen. Click on the **Add Property** button to display a list of **Categories** from which to choose.



Select a mass category from the list to open the associated Mass Entry form. *Add Mass Property* is used in the example.



**Note:** The offenses that require at least one property appear in red, otherwise they appear in black.

If you select *Recovered* as the **Current Status**, a **Recovered Date/Time** required field appears.



Enter the property details in the fields provided; be sure to scroll to the right to see all fields. See "Evidence/Held Property" on page 227 for instructions on entering the details.

Be sure to scroll to the far right for *Processing* radio buttons.



Add additional property rows if needed.

There are two ways to add additional property:

- To add one row, click the Add button on the left.
- To add multiple rows, enter the number of rows you want to add in the text box next to the Add More Rows button, then click the Add More Rows button.

Select the **Current Status** and, the **Date of Info** if different than the default, and any **Comments**.

You can associate all property listed with all offenses, none, or a specific offense.



After selecting offense option, enter additional information if prompted.

When an offense on the report requires a property or vehicle association, validations are in red advising of the requirement. Make note of the instructions indicating what property should be associated to what types of offenses. Hovering over the blue information bubble will provide examples.



Note: You can associate property to an offense later by clicking on the edit icon under the Actions column on the *Property & Vehicles* tab.

Click the Save button.

If you selected the **Evidence/Held** radio button on one or more property items, click **Yes** to enter the items as evidence/held property when prompted.

The Evidence/Held Property screen opens where those are listed in mass.

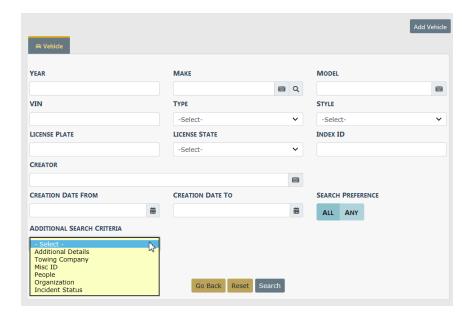


- Enter the information in the fields provided, and be sure to scroll to the right for all fields.
- Select the Save button.

You are taken back to the **Property & Vehicles** tab for review.

# **Add Vehicle**

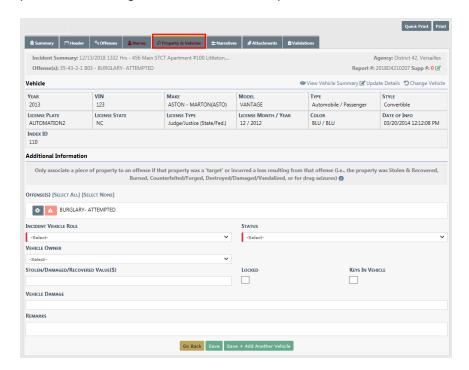
Selecting the Add Vehicle hyperlink will display the Search Vehicle screen.



Note: Always search the Master Indices prior to adding a new record.

Search as broadly as possible to yield more results and Refine Search as necessary to narrow the search. This helps to prevent duplicated records for the same Person, Address, Vehicles, etc. in the Master Indices, and it keeps all RMS system activities related to the record in a centralized location.

The search results display either a list of records matching the search parameters or will indicate that there were no results found. If the desired record is listed you can select the existing record as the victim for the report. Best practice is to review the information by clicking on the VIN or Index ID to review the information and verify it is up to date prior to selecting the record for the report.



When an offense on the report requires a property or vehicle association, validations appear in red advising of the requirement. Make note of the instructions indicating what property should be associated to what types of offenses. Hovering over the blue information bubble will provide examples.



## Crime Not Selected/Associated



## Crime Selected/Associated



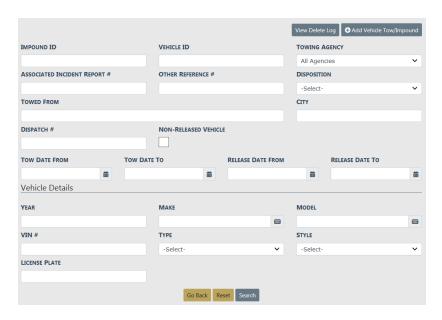
Once all this information is completed select either the **Save & Add another Vehicle** button to add more property or the **Save & Continue** button to return to the **Property & Vehicles** tab for review.

Once all Property & Vehicle have been added, select the **Finished – Go to Next Section** to advance to the **Narrative** tab.

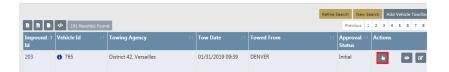
# Add Existing Impound

Vehicle Tow/Impound can be associated with an Incident. However, the Tow/Impound grid will not appear on the Incident screens is the Agency is not using the Tow/Impound module.

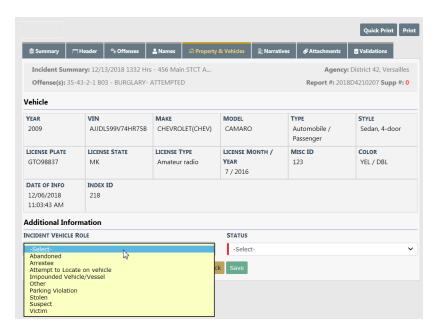
Selecting the **Add Existing Impound** hyperlink displays the **Vehicle Tow/Impound Search** screen.



Enter the necessary data to search for the record needed, then click the **Search** button to view the results.

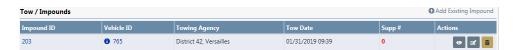


Click the **Select** icon to select the record and to open the **Associate Incident to Vehicle Tow/Impound** page.



Select the proper **Incident Vehicle Role** and **Status** from the lists, then click the **Save** button.

The Tow/Impound record is now associated to the Incident.



## Print Labels, Receipts, Chain of Custody

After all the property and evidence have been entered you can review the property, evidence, or held property entered on the report. If evidence or held property exists, you have the ability to print **Labels**, **Receipts**, and **Chain of Custody**.

There are two access points to print labels, receipts, and chain of custody:

The Summary tab of the Incident Report, then scroll down to the Property section.



The Property & Vehicles tab of the Incident Report.



Select **Print Evidence/Held Property** and the *Incident Properties Reports* window displays.



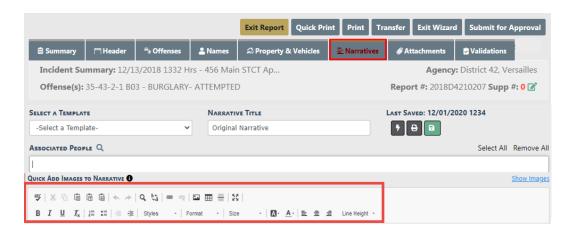
Select which properties to include, then select the **Print Labels** button.

A PDF document opens in a new tab in your browser. Print directly to the printer or save the PDF document giving it a custom filename.

**Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.

#### Narrative Tab

While on the **Narrative** tab, click on the **Add Narrative** button to open the Narrative entry screen where there is a built-in editor with formatting tools that supports grammar and spell checking, and provides the ability to format the body of the narrative.



You can insert an **image** directly into the Narrative. Before you insert an image, click into the body of the Narrative where you want to place the image.

There are two ways to insert an image on the Incident Narrative:

1. Click on the Image icon on the tool bar.



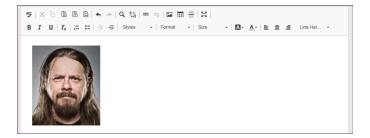
A dialog window appears giving you the option to select a file.



Click Browse then select an image file and click Open.

Select the Image Size, then click OK.

The image inserts into the body of the narrative.

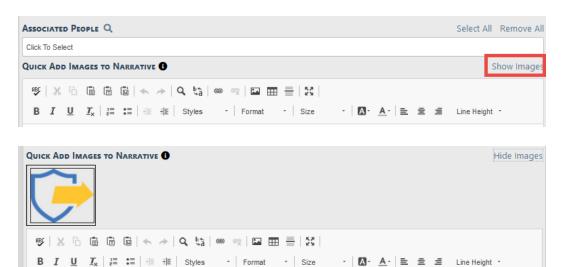


To *remove the image* from the body of the narrative, click on the image then press the **Delete** key on your keyboard.

2. Insert image from your Image Library.

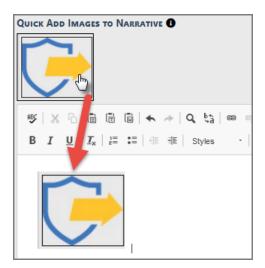
Note: This option is not available when entering Arrest or Case Narratives.

Select the **Show Images** link to display the images in your personal Image Library.



To hide the photos, click the **Hide Images** link on the upper right.

Click on the **image** to select and insert it into the Narrative.



The built-in *Spelling and Grammar Checker* identifies mistakes and corrects them as you type your narrative.

Some agencies may use **Narrative Templates** to guide you in creating their narrative. If a template is selected, the information will be applied to the narrative for you to complete and edit as required.



The **Narrative Title** will default to *Original Narrative* but you may edit the title if necessary.

Select **Associated People** to associate the Incident persons to the Narrative. Select as many that apply.

There are icons for printing the narrative and for saving the narrative which can be used at any time while the narrative editor is open.



As the narrative is being typed, the system auto-saves the narrative every sixty seconds in the event the connection is lost or the computer becomes unusable. The system will also provide auto-complete options as you type to make data entry easier and faster.

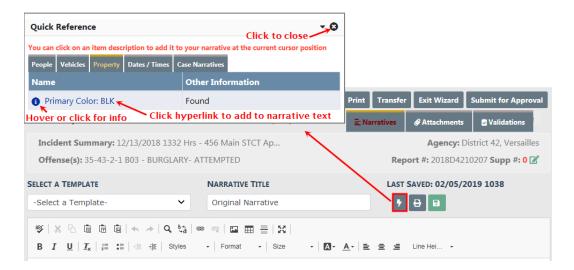
If the application attempts to save and is not able to reach the server, you are presented with a Warning indicating the connection may be lost. Navigating away from this screen may cause you to lose up to 60 seconds worth of your narrative. Simply reestablish your connection and select the **Click Here to Try Again** link so the narrative can be saved to the server and continue the auto save feature.

You should only have one workstation logged in to Online RMS at any given time.

If you have two workstations open on the Narrative screen, the first session open to the Narrative page is saved in Online RMS. If you write a lengthy narrative on the second open session, it does not save on your report.

Note: Always Save and Exit your Narrative when leaving the computer for any length of time, or move to a different computer to complete your report. The **Quick Reference** icon is a hyperlink that displays a window in the upper left hand corner which provides easy access to all the people, organizations, vehicles and property, and case narratives within the incident report.

**Note**: If no items exist for a particular tab, that tab does not appear. For example, if a Case Narrative does not exist with an associated Case, then the Case Narrative tab does not appear.



The **Quick Reference** window contains blue hyperlinks. By clicking on the blue hyperlink you add that particular information directly into your report's narrative in the area where your cursor is located.

You may also place your mouse over the blue information bubbles to see additional information.

Once the narrative has been completed you can select the **Save & Continue** button which will display the **Narrative** tab for review. Additional narratives may be added to the report by selecting the **Add Narrative** link to the top right which will open a new narrative entry screen.

Note: If the agency is configured to bring over notes from CAD, you will see those narratives listed. You can view, edit, or delete the existing narrative as needed. A new narrative can be added by selecting the Add Narrative link.

When you have completed the narrative(s) for the report, select the **Finished - Go To Next Section** button to navigate to the **Attachments** tab.

## Attachments Tab

The **Attachments** tab is used to capture incident related attachments such as crime scene photographs or statements, and you can download existing attachments. This is also the location where *Qustom Forms* can be completed if the agency is using them.



To add a file or image as an attachment, select the **Add Attachment** hyperlink. For more information on adding and downloading attachments, refer to "Attachments" on page 67.

To add an image file from your personal Image Library, select the **Image Library** hyperlink. If images do not exist in your Image Library, then the hyperlink does not appear. For more information on the Image Library, refer to "Image Library" on page 73.

To view an image, select the **Image Viewer** hyperlink.

When all attachments are saved and closed the system returns to the **Attachments** Tab where the files will be displayed.

There are icons next to each file in the *Actions* column that allows you to download, view, edit, and delete the file.

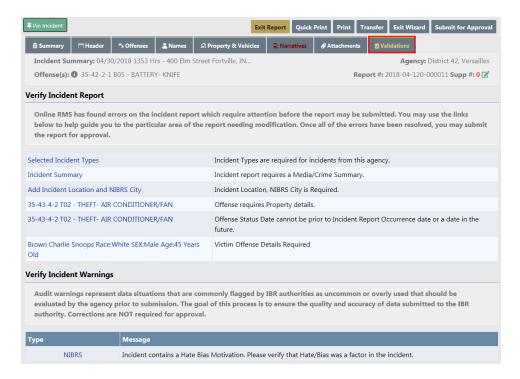
Agency Forms can also be completed in the attachments section of the incident report. Select and complete the form from the drop-down menu. Refer to your administrator for details.



Select the Finished - Go To Next Section button to advance to the Validations Tab.

#### Validations Tab

The **Validations Tab** allows a final check of your report to ensure the minimum requirements are met based on the offense(s) entered on the report. The validation check occurs automatically when navigating to the **Validations** tab. The validation process verifies all the minimum requirements are met, then lists information still required for the report along with a hyperlink to that section of the report



Click on each hyperlink in blue to correct the errors. After each correction, click **Save**, **Continue**, or **Update** (the button differs on each form) to return to the Validations page, or click **Return to Incident Validation** to return without saving.

A message appears in the **Incident Validations** tab when the report passes all validations.



Once the report is valid, submit it for approval. For more information on submitting for approval, refer to "Submit For Approval" on the facing page.

## Submit For Approval

When the report passes all validations, it is ready for approval submission. Submit the report for approval by selecting the **Submit for Approval** button located at the far right hand of the screen just above the tabs.



Users with approval authority will receive a message to either approve or submit the request.



By selecting the **Submit** button, the **Submission** screen appears. The *Approving Agency* defaults to your home agency and the *Approving Group* defaults to the *Approving Supervisor*. A text box is provided to supply additional information for the *Approving Supervisor*. Select the **Submit** button for submission.



**Note**: Only a multi-tiered agency user will have the added ability of selecting the *Approving Agency* to direct the report for approval to the agency where the report was taken.

Select Yes to submit for approval.



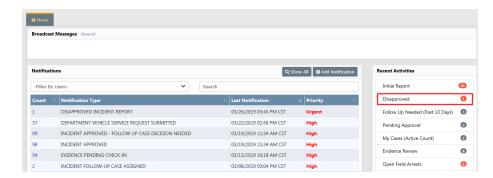
The Approving Supervisor receives notification that the Incident Report needs approval. For more information about the approval process refer to "Approve/Disapprove Incident Report" on page 411.

There may be times when the *Approving Supervisor* **disapproves** the Incident Report and routes it back to you for more information or to make corrections. After making corrections, you have an opportunity to resubmit for approval. For more information, refer to "Disapproval Notice Corrections" below.

## **Disapproval Notice Corrections**

The Approving Supervisor may **disapprove** the Incident Report and route it back to you for more information or to make corrections. You will then have an opportunity to make the necessary corrections and resubmit for approval.

The Recent Activities section of your Home page displays those that have been disapproved.

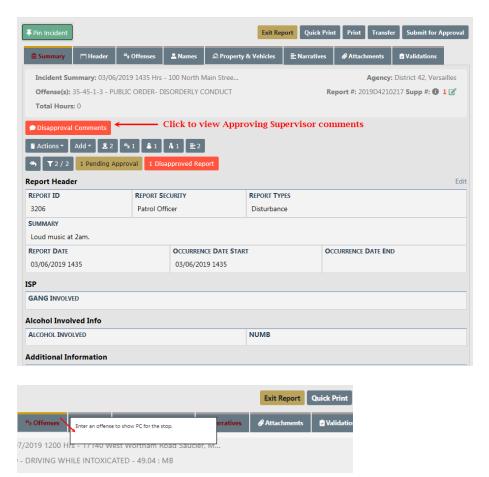


Click the **Disapproved** link to display a list. The number of incidents that appear in the list match the disapproved number that displays in Recent Activities.



Click the transfer icon to transfer the incident to another user, or click the edit icon to make changes to the incident.

The *Incident Report* opens if you chose to edit. Click the red **Disapproval Comments** button to view the *Approving Supervisor* comments, or mouse over tabs highlighted in red to view disapproval comments associated with that tab.

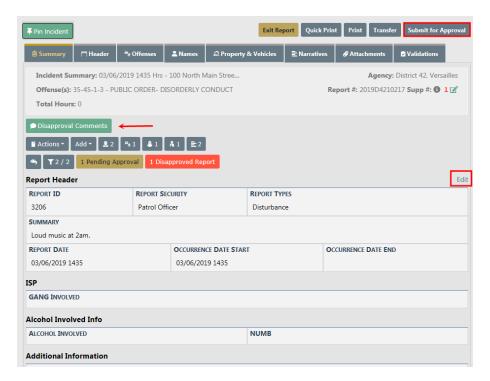


Review the supervisor comments and check the **Acknowledged** box. Add **Response Comments**, if any, then click **Save** to return to the *Incident Report* page.



**Note**: All disapproval comments must be acknowledged prior to submitting report for approval.

On the *Incident Report* page, click **Edit** on the top right of applicable sections to make any necessary changes.



**Note:** The **Disapproval Comments** button turns green when supervisor disapproved comments are acknowledged.

Click the **Submit for Approval** button on the top right of the *Incident Report* page. For more information on submitting incidents for approval, refer to "Submit For Approval" on page 243.

Click the **Submit** button on the bottom of the *Submit for Approval* page. Notice the disapproval comments and responses appear on the bottom of the page.



## Select Yes to submit for approval.



The Approving Supervisor receives notification that the Incident Report needs approval. For more information about the approval process refer to "Approve/Disapprove Incident Report" on page 411.

Click Go Back to return to your Home page.

## Summary Tab

The **Summary** tab contains a summary of all the information that is contained in the other tabs of the current Incident Report.



Information in the **Summary** tab is divided into sections, such as Officers, Employees, Offenders, Victims, Narratives, etc.

The icons under the tab headers and Incident description are hyperlinks that direct you to each section. Hover your mouse over the icon to view a description of the hyperlink.



For example, select the *Offenses* hyperlink and you are directed to the *Offenses* section of the **Summary** tab.



Add data to the Incident Report in sections that contain an **Add** hyperlink. For example, the **+ Add Person** hyperlink opens the **Person Search** screen to begin the process of adding a person to the report.

The **+ Add Field Arrest** hyperlink under the Field Arrests section provides the ability to associate a *Field Arrest* to the report, or you can create a Field Arrest from the Offender section and associate it to the Incident automatically.

Beginning with Online RMS 11.7.0, with appropriate permissions, you can create a Field Arrest and import data from an existing Incident or Calls for Service record into the arrest record, avoiding unnecessary data entry. This process also associates the Field Arrest to the Incident or Calls for Service record automatically.

- Click on the Add Field Arrest icon next to an offender's name on the Summary or Names tabs.
- For details on the create and import field arrest process, refer to "Create Field Arrest from Incident" on page 263.

The **Calls for Service** section is located toward the bottom of the **Summary** tab. Page down or click on the icon hyperlink to go directly to the CFS section.

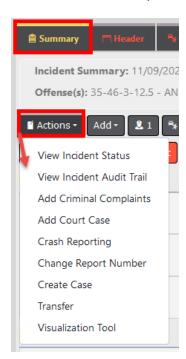


In the **Calls For Service** section, view the associated CFS by selecting the **View** icon under the *Actions* heading, click the **Add Call for Service** link to search for and associate an existing call for service record to the incident, or click the delete icon to remove the association.



- The Add Call for Service link appears for any user able to edit the incident report.
- The delete icon appears when the user is the original creator of the association or the user has permissions to delete the association.
- When deleting the association, a prompt appears asking you to enter a Comment as to why you are deleting the association. The comment, report number, and dispatch number are stored in an audit table.

The Summary tab also contains an **Actions** button that allows you to perform certain actions. Click on the button to view a drop-down list of choices from which to choose. This list is based on permissions and varies by agency.



**Note:** Authorized users can add attachments to supplement 0 while outside the normal approval workflow and when the Incident is not in edit

mode. For details, refer to "Add Attachments Outside Incident Workflow" on page 280.

## **Add Criminal Complaints**

This option is available providing you have the appropriate permissions and the feature is turned on for your agency.

Perform one of the following options on the **Summary** tab to add a Criminal Complaint:

- Click the Actions menu button, then click Add Criminal Complaints.
- or Page down on the Summary tab to the Criminal Complaints section and click Add Criminal Complaints.

The Create Criminal Complaint form opens.



## Select the Offenders.

- The names listed are only the Incident suspect/offenders that do not already have a criminal complaint associated with the incident.
- A Criminal Complaint is created for each person selected.
- Only displays.

# Select one or more Charges.

At least one charge is required.

Select the Complaint Type from the drop-down list.

If applicable, check the box to make yourself the **Complaint Officer**.

If the Incident has Custom Forms, an option displays allowing you to select any or all **Custom Forms** to be associated with the criminal complaint.

If applicable, check the box if you want to attach the full **Incident Printed PDF Report**.

 If the Incident has Custom Forms and it is configured to create a fillable form, the fillable form PDF is associated with the criminal complaint instead of the custom form.

Click **Save** to create the Criminal Complaints and associate them to the Incident Report supplement automatically.

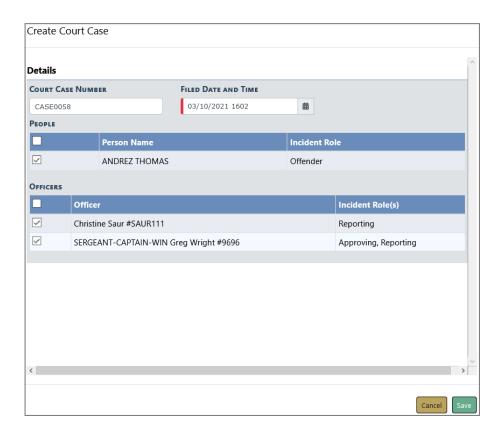
- The complaints are listed in a grid on the *Summary* page. You can further edit the complaint and submit for approval.

#### **Add Court Case**

Perform one of the following options on the **Summary** tab to add a Court Case:

- Click the Actions menu button, then click Add Court Case.
- or Page down on the Summary tab to the Court Case section and click Add Court Case.

The Create Court Case form opens.



Enter the Court Case Number.

Select the Filed Date and Time.

Select the **People** involved.

Select the appropriate Officers.

Click **Save** to create the Court Case and associate to the Incident Report supplement automatically.

#### **Add Associated Incidents**

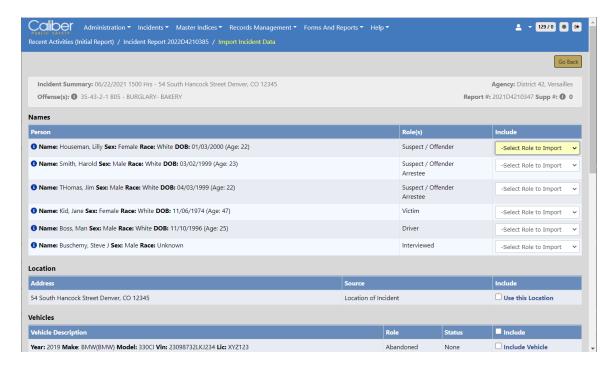
You can associate an incident report with another. There are two ways to do this:

- Click on the **Add Associated Incident** link in the *Associated Incidents* section of the *Summary* tab to search for and select an Incident.
- An association to another incident happens automatically during the Copy Incident ent process, if utilized by your agency. For more information on the Copy Incident process, refer to "Copy an Incident" on page 254.

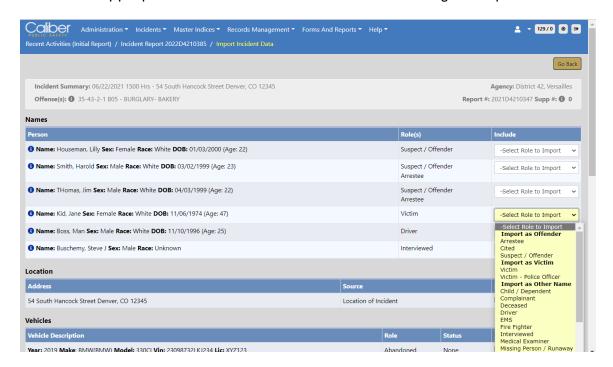
From the grid for the associated incident, select the icon to import data from that incident.



When importing incident data, each association will appear with a selection field.



Choose the appropriate role for each association before saving the imports.



Incidents that are hidden do not appear in this grid unless you have proper permissions to view them. For more information on hidden Incidents, refer to "Incident Security" on page 190

## **Crash Reporting**

If configured for your agency, this option is a single sign-on to the Ethos home page for States where the LexisNexis Ethos Crash application is available.

# Copy an Incident

If your agency chooses to use this feature, authorized users can copy an existing incident and save it as a new Incident.

Requirements to use this feature:

- Your agency must be using the Incident number generation feature.
- The user's role must be given copy incident permissions and be in the same organization as the incident.

You can copy an incident from edit or view mode from the **Actions** menu on the Incident *Summary* tab.

The process does not copy offense-related information. For example, property or vehicles directly related to offenses do not copy to the new Incident, whereas, they do copy over if they are not offense-related.

The following information can be copied to the new incident:

- General information from the header, including custom fields.
- People or organizations.
- Custom forms.
- Attachments.
- Narratives.
- Property and vehicles.

Only basic information copies to the new Incident at this time; additional information will be included in a future release.

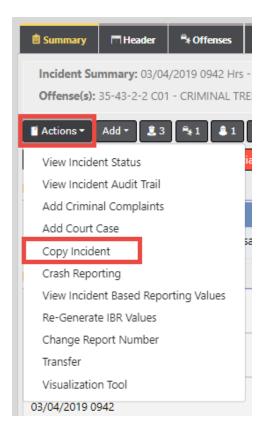
Employees.

- Offenses.
- Officers.
- Associated CFS and Fields Arrests.

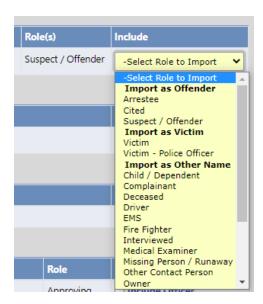
The copy process only copies information from supplement 0. If you are copying information from an Incident that has multiple supplements, the new Incident includes information from supplement 0 and not from subsequent supplements.

Follow these steps to copy an incident to a new Incident record:

- 1. View or edit the Incident.
- 2. Click on the Action button on the Summary tab, then click Copy Incident.

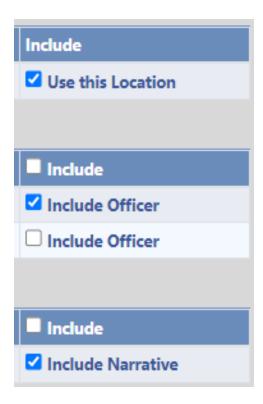


- 3. The Copy Incident screen opens.
- 4. For each person and business, select the **Role to Import** into the new Incident. The role could be the same or different on the new Incident than the role on the original Incident. The original role appears in the *Roles(s)* column.



**Note:** If you do not select a role to import, that name or business does not import into the new incident record.

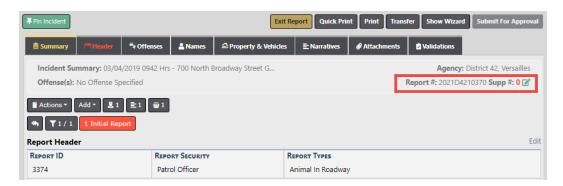
- 5. Select the **Location** to copy to the new Incident. This is the main location for the Incident. Only one location can copy to the new Incident at this time.
- **6.** Select all other information you want to copy to the new Incident, such as property, vehicles, officers, calls for service associations, field arrest associations, narratives, attachments, etc. Other than location, you can choose one or multiple within each of the other categories.



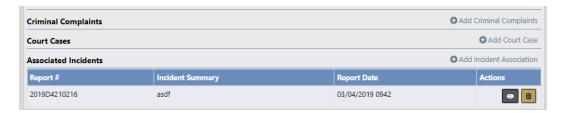
If the Narrative is associated to a person and that person is copying to the new Incident, then the narrative copies with the person. If you choose to copy the narrative but not the person, the narrative copies to the new Incident without the person.

**Note:** Calls for Service and Field Arrests are the only associated events that copy over to the new Incident (not citations, for example).

- 7. Make any changes to other information on the Incident, if needed.
- 8. Click Save.
- 9. A supplement 0 report is created with a new Incident number.



**10.** The process associates the original and new Incident reports automatically. Page down while on the *Summary* tab to view the association.



You can also associate another Incident by clicking on the **Add Incident Association** link.

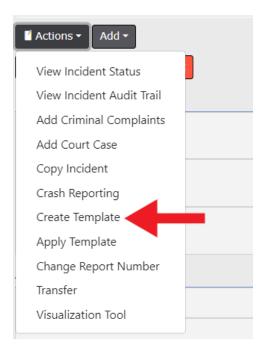
# **Incident Templates**

If your agency chooses to use this feature, authorized users (including users who have ownership of the incident to be edited) can create an apply templates to incidents for frequently used incident scenarios and details.

## **Creating Incident Templates**

Follow these steps to create a template.

- 1. View or edit the Incident.
- 2. Click on the Action button on the Summary tab, then click Create Template.



3. From the *Create Template* window, enter a template name and description.



4. Using the check-boxes, select the elements from the incident report that you wish to include in the template. The elements that can be included are Medisa Summery, Incident Types, Location, Offenses, Victims, and Narratives.

**Note:** You may choose to make a template for your user profile ONLY by selecting the **Limit To My User** check-box. Leaving this box unchecked will create a template available to the entire agency or organization, depending on the user's permissions level.

- 5. Select **Save** to save the template. You will be prompted to confirm the creation of the template. (Choose **Yes** to confirm or **No** to cancel.
- **6.** You will see a brief message confirming the template has been created before you are returned to the *Summary* tab.

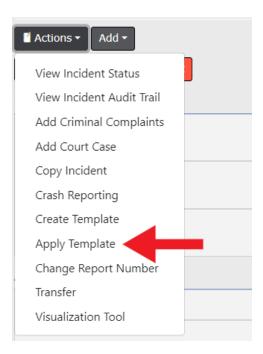
**Note:** Meta data and custom fields are carried over when creating templates.

## **Applying Incident Templates**

After you have created templates, Follow these steps to apply a template.

Note: Applying a template will only add information to an incident. It will never remove data. Duplicate items will not be added twice, but the user may choose to replace the incident location with the location from the template, if desired. Adding a template adds everything in the template; at this time, there is no option to select individual items from the template to include or exclude.

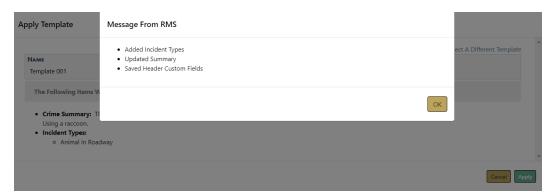
- 1. View or edit the Incident.
- 2. Click on the Action button on the Summary tab, then click Apply Template.



 A list of templates for your user profile appears. You may choose from among your profile's templates, or use the drop-down window to select an agency template (if available).

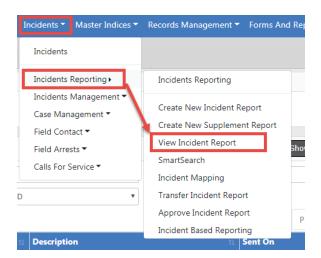


- 4. Select the template you want to apply by clicking the icon. You will be prompted to **Apply** the selected template, or **Cancel**.
- 5. If you click Apply, you will be prompted to click Yes to confirm or No to cancel.
- **6.** If you click **Yes**, a confirmation screen will display, showing you which elements have been brought over from the applied template.



# **View Incident Reports**

The option to View Incident Reports is in the Incidents menu.



A **Incident Search** window opens, where you can search for a particular incident to view by entering data in any field or combination of fields. For more information on incident searching, refer to "Incident Search" on page 266.

Click on the view icon in the incident Search Results to view the Incident Report.

The Summary tab opens by default. If the report has more than one Supplement, the number of Supplements are listed next to the con.

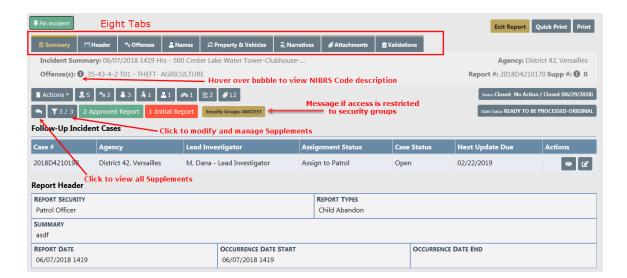
**Note:** The *Summary* tab will also advise if a follow-up Case has been assigned to the incident.

**Note**: With appropriate permissions, an investigative case can be created directly from an *initial unapproved* Incident report using the **Actions** button.

**Note:** If access is restricted to the selected security groups, a message appears on the summary tab of the incident indicating which security groups have access.

For more information on the *Summary* tab, refer to "Summary Tab" on page 247.

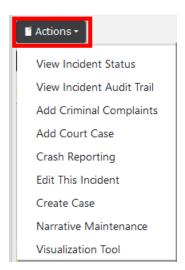
Caliber Public Safety Chapter 12. Incidents Online RMS11.11



Click on each tab heading to navigate to the different tabs of the Incident report.

**Note:** With appropriate permissions, you can *Pin* the Incident while on the Summary tab to add it to your Home Page for quick reference. For more information, refer to "Incidents Overview" on page 185.

Click on the **Actions** button to perform additional tasks shown.



## Create Field Arrest from Incident

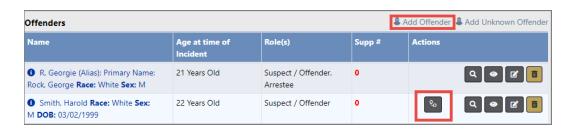
Beginning with Online RMS 11.7.0, with appropriate permissions, you can create a Field Arrest and import data from an existing Incident or Calls for Service record into the

arrest record, avoiding unnecessary data entry. This process also associates the Field Arrest to the Incident or Calls for Service record automatically.

You can initiate this process two ways from the Incident:

- When the Add Field Arrest icon appears next to an existing offender's name.
   This can be done from the Summary or Names tab of the Incident.
- When you add an offender to the Incident

Note: The icon only appears on offenders who do not already have an Arrest associated with the Incident.



Follow these steps to initiate the process to create the Field Arrest and import Incident data:

- 1. Choose one of the following options:
  - a. Click on the Add Field Arrest icon of an existing offender.
  - b. Click on the **Add Offender** link and follow the normal process to add the offender. For details, refer to "Names Tab" on page 215.

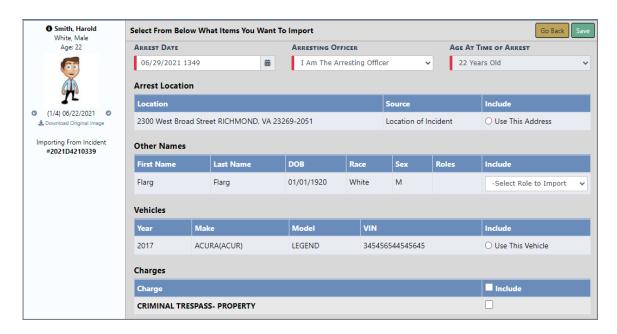
When finished entering offender information, a prompt appears asking if you want to create a Field Arrest for this offender.



Click Yes.

2. The *Import and Create Field Arrest* screen appears, prepopulated with the Incident data that can import into the arrest.

Caliber Public Safety Chapter 12. Incidents Online RMS11.11



Make any necessary changes to the data in the fields provided and make the appropriate selections.

For details on the *Import and Oreate Field Arrest* screen, refer to "Create Field Arrest and Import Data" on page 349.

- 4. Click Save then Yes to confirm creation of the Field Arrest.
- The process creates the Field Arrest record and associates the Field Arrest record to the Incident automatically. The association appears on the Summary tab of the Incident.
- 6. The process updates the existing offender on the incident with the role Arrestee and the Add Field Arrest icon no longer appears next to the offender's name since they are now listed as an offender on the Incident.
  - If you are creating a new offender, the process adds that offender to the Incident, gives it the role **Arrestee**, and does not display the **Add Field Arrest** icon nex to the name.
- **7.** The *Edit Field Arrest* screen appears. Make any necessary changes to the Field Arrest record.
  - For more information on editing a Field Arrest, refer to "Edit Field Arrest" on page 353.
- 8. If applicable, click **Complete** and **Submit for Review** if the review feature is turned on. You are then returned to the Field Arrest.

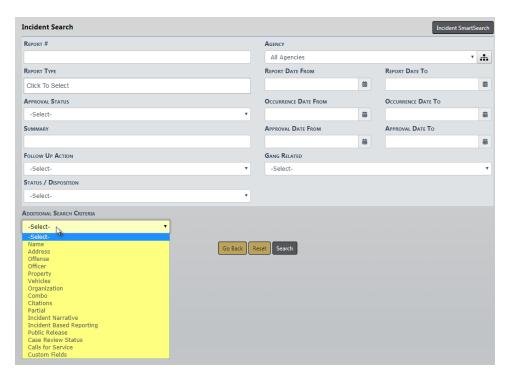
- 9. Click Go Back on the Field Arrest to return to the Incident.
- 10. Click on the Names tab of the Incident.

**Note:** The Names tab is red, indicating arrestee details are needed. This process does not currently update the arrestee details for you; however, Incident validation still applies as with other incidents, indicating more information is needed.

11. Click the **edit icon** on the offender record to update the arrestee details to satisfy validation if needed.

## Incident Search

The **Incident Search** window allows you to search for incidents by entering data in any field or combination of fields. When entering the report number you can use the % sign as a wildcard. For example, if you were looking for report number 2018D4210149, you could enter %10149 and the report would be located. Agency defaults to your agency, but with appropriate permissions, a different agency in your workgroup can be selected. Select the *Additional Search Oriteria* for more search options.

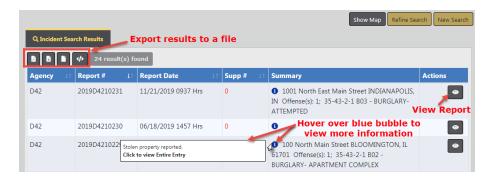


**Note:** You can include **Use of Force** in your search criteria by first selecting **Name** or **Combo** under *Additional Search Criteria*.

Select **Combo** as the *Additional Search Oriteria* to enter criteria for vehicle, officer, property, offenses, modus operandi, address, and person. When you select Combo, additional search fields appear where you can enter search criteria for the aforementioned areas.

You can search for incidents across all agencies within the user's state by clicking on the **Incident SmartSearch** button on the top right of the screen. For more information on **SmartSearch** refer to "SmartSearch" on page 267.

If you type in a specific report number, the system takes you directly to the report. If you click the **Search** button without entering any search criteria, a message appears in red at the top of the screen instructing you to specify at least one field when performing a search. Regardless of which method you use to query the system, except for specific report number, you will receive a list with reports matching your search criteria.



At the top of the *Incident Search Results* window there is a **Show Map** feature that plots the listed reports with GEO Verified addresses using **Google Maps**. The **Export Results** allow you to export the list to a PDF document which can be printed, export to an Excel document, export to a Comma Spaced Values (CSV) file, or to an Extensible Markup Language (XML) file.

Click on the view icon to view the Incident Report. The Summary tab opens by default. If the report has more than one Supplement, the number of Supplements are listed next to the con.

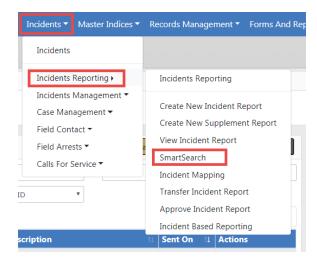
## **Smart Search**

Users can, with appropriate permissions, search for incidents across all agencies in the Online RMS system within the user's State, outside of the State if configured by your

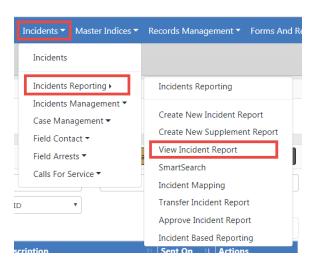
agency, or both. You can also limit your search using date range filters. This search adds a simple interface to perform searches the way one would in an Internet search engine, such as Google.

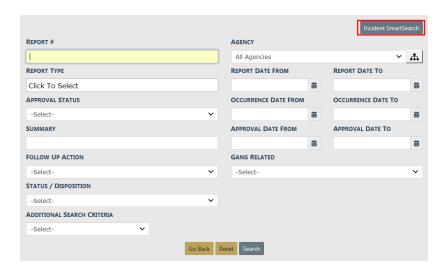
You can access Smart Search two ways:

• Click the *Incidents* menu on the top navigation bar, click *Incidents* Reporting, then click the SmartSearch option.



• Or click the Incidents menu on the top navigation bar, click View Incident Report, then click the Incident Smart Search button on the Incident Search screen.





Either option opens the Incident SmartSearch screen.



Enter a word or phrase into the search box on the upper left, then click the **Search** button. The results display based on how well they match the entered text.

**Note**: The **Smart Search** only searches on Approved incident reports. Incident reports with other statuses can be searched using the standard View Incidents option in the Incidents menu.

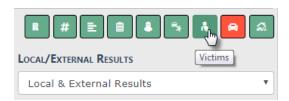
The default sorting option is *Relevance*, which means **Smart Search** sorts the returning documents based on how well they match the entered text. There are other sorting options available in the *Sort By* area.

To ensure that each document contains every search word specified, check the *Match All* option. This forces the search to return documents which only contain all of the words or phrases entered in the search bar.

Review the search results in a *List* format, or on a *Map*.

The green icons on the right side of the page indicate what areas of the incident report are being searched. Hover your mouse over an icon to view what it represents. Click on

each icon to disable or enable an area. Disabling will cause **Smart Search** to exclude that area from the search; red icon excludes and green includes.

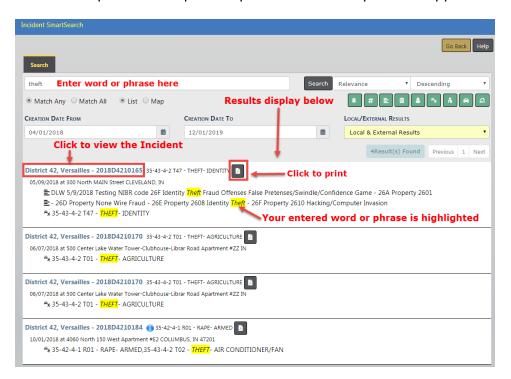


Optionally, enter a date range to filter your search results for specific date ranges.

You can filter by Local Results Only, External Results Only, or Local & External Results if configured by your agency.

If you chose to display the results in a *List*, the results highlight the text matching your query. If any *Offenders* in the matched reports have mug shots, these also display. You can view the report by clicking on the **Incident Report #** link at the top of each result. This opens a new tab, letting you view the report details without actually leaving the search page. To return to the search page, click the Search tab.

Click on the print icon to print a specific Incident Report that appears in the results list.



# **Printing Options**

When viewing the **Incident Report** there are two print options available.

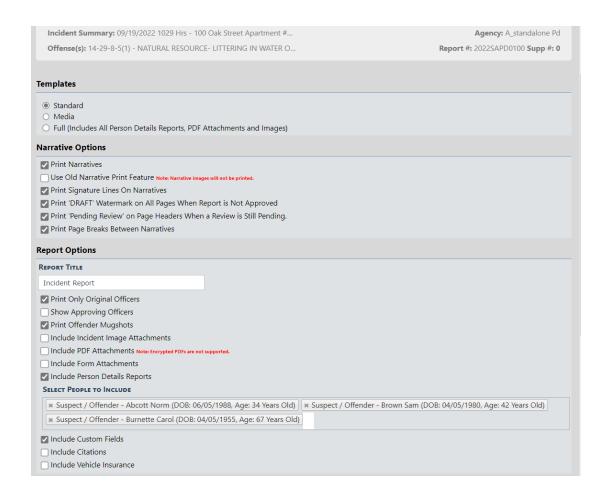


The **Quick Print** button opens a PDF document in a *Standard* format containing the basic information on the report, excluding attachments.

The **Print** button takes you to a full menu of print options. The top of the window has available print templates for easy selection.

- Standard-prints the main areas of the report and associated people. The checked areas can be edited to further customize your print.
- Media- selects the most common public information areas to include and appropriate redaction options. The checked areas can be edited to further customize your print. Please refer to your agency's policy on Public Information.
- Full- selects all areas of the report including attachments, forms and person details. The checked areas can be edited to further customize your print.

Note: Only Known master people can be printed.





Choose a **Template** and select the options you wish to include and/or redact on the report.

Click the Print Report button.

A PDF document opens in a new tab in your browser. Print directly to the printer or save the PDF document giving it a custom filename.

**Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.

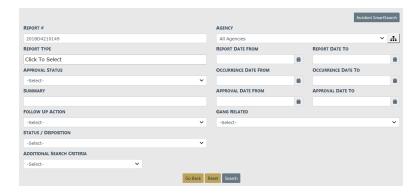
## **Changing Incident Status**

With proper authority you can change the status of an *Approved Report* to either *Initial* or *Disapproved* from the **Incident Status** screen. Every change to the **Incident Status** is tracked in the *Status History*.

You can access the **Incident Status** screen from the *View Incident Report* screen, or from the *Incident Report* menu.

## From View Incident Report

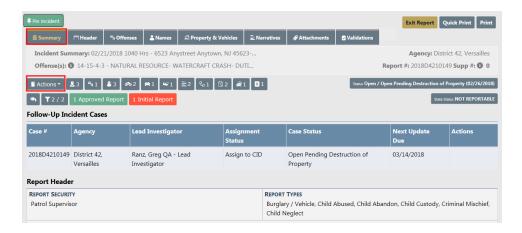
Click on the *Incidents* menu on the top navigation bar, select the *Incidents* Reporting submenu, then select View Incident Report to display the Incident Search screen. For more information using this method, refer to "View Incident Reports" on page 261.



On the Incident Search Results screen, click the view icon to view the incident.



Click the **Actions** button on the *Summary* tab of the Incident Report, then select **View Incident Status**.

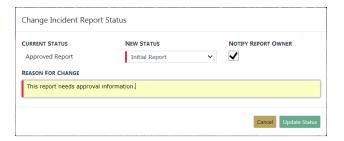




Click on the select icon on the right of the appropriate Incident to open the **Incident**Status record, then click on the change status icon to open the *Change Incident*Report Status screen.

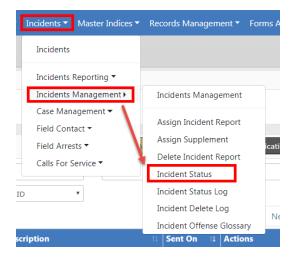


On the Change Incident Report Status screen, click New Status and select a status from the drop-down list, enter the Reason For Change, select whether or not to Notify Report Owner, then click the Update Status button.

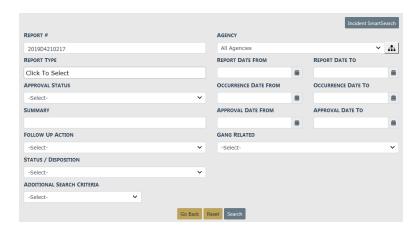


## From the Incident Management Menu

Click on the *Incidents* menu on the top navigation bar, select the *Incidents Management* submenu, then select *Incident Status* to display the Incident Search screen.



Enter the search criteria then click the **Search** button to display the **Search** Results.



Click on the select icon on the right of the appropriate Incident to open the **Incident Status** record.



#### Disapprove

To disapprove, either click on the disapprove icon to disapprove and add comments.

Or click on the revert to initial status icon to choose a **New Status** of *Disapproved Report*, enter the **Reason For Change** and select whether or not to **Notify Report**.

#### Change back to Initial Report

Click on the revert to initial status icon

On the Change Incident Report Status screen, click **New Status** and select Initial Report from the drop-down list.

Enter the Reason For Change.

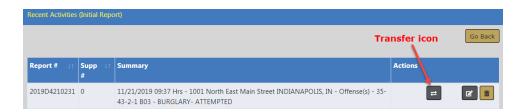
Select whether or not to Notify Report Owner.

Click the **Update Status** button.

# **Transfer Incident Report**

You have the ability to **Transfer Incidents** (Initial and Supplements) to other officers or to *Records*. You must *own* the report and it must be in *Initial* or *Disapproved* status. This can be done from the **Recent Activities** menu, or by searching for reports using the **Transfer Incident Report** section in the **Incidents** menu.

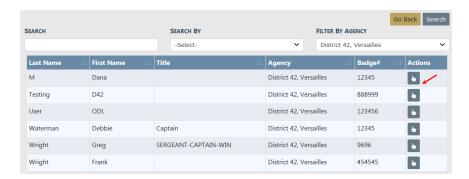
#### My Recent Activities



Select the **Transfer** icon to open a window with the transfer options.



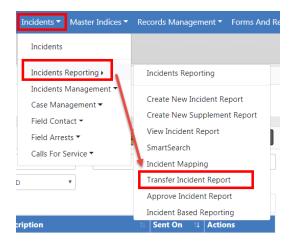
Select **Officers** or **Records** then click the **Transfer** button. If **Officers** is chosen, then select the appropriate officer by clicking the **Hand** icon.



Select Yes to confirm the transfer, or select No to return to the Select User page.



#### Incidents Menu



Enter the search criteria then click the **Search** button to return the search results, then select the **Transfer** icon to open a window with the transfer options.



Select either **Officers** or **Records** in the *Transfer Options* window then click the **Transfer** button.



Caliber Public Safety Chapter 12. Incidents Online RMS11.11

If Officers is chosen, then select the appropriate officer by clicking the Hand icon.



Select **Yes** to confirm the transfer, or select **No** to return to the *Select User* page.



**Note**: Once ownership has changed hands, only the new owner can edit it as if it were an *Initial Report* of their own.

# **Delete Initial Incident Report**

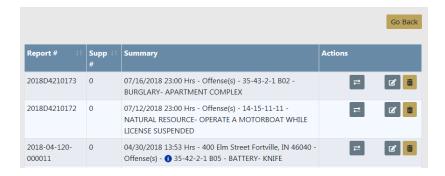
A report that is initial status, and not submitted for approval, can be deleted by the owner of the report or by other users who have the delete authority. This can be done until you submit the report for approval. As the owner of a report, you can quickly access it from **Recent Activities** using the **Initial Report** link.



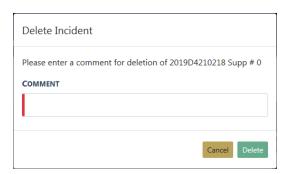
**Note**: Before proceeding further be aware that reports that are deleted are not recoverable from the database. A *Delete Log* is available, where a list of reports that have been deleted and by whom can be viewed.

Use the following procedure to delete one of your reports that is still in Initial Status.

- 1. If needed, click the *Home* tab in the upper left corner of the screen to open your *Home* page.
- From the Recent Activities section, click on the number link to the right of Initial Report to open the Recent Activities window with a listing of your recent incident reports that are still in Initial Status.



3. Locate the report you want to delete and click the delete icon ...



4. Type the reason for deletion in the **Comment** text box and click the **Delete** button to return to the **Recent Activities** window.

# **Add Attachments Outside Incident Workflow**

Authorized users can add attachments to an Incident Report outside the Incident workflow by searching for the incident.

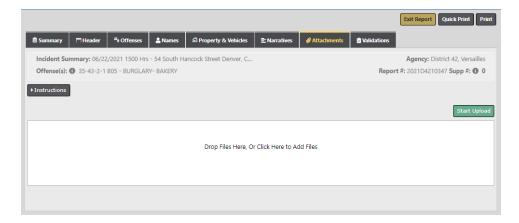
Attachments that are added outside the workflow are set to supplement 0.

**Note:** The user's role must have the permission *Incident - Always Add Attachments to incident Regardless of Status* to perform this action.

To add an attachment while on an Incident, select the **Actions** button, then **Add Attachments** menu option.



The Attachments tab opens where you can upload the attachment.



For details on uploading attachments, refer to "Add Attachments" on page 67.

After uploading, the attachment then displays in the grid with a red info bubble indicating the attachment was added outside the approval process. Hover over the info bubble to view the message.



# **Expunging Records**

Refer to your agency's policy on **Expunging Records**. When an agency is required to expunge a record, the specifics on what needs to be expunged are in the Court Order.

With proper permissions you can expunge an offender/arrestee from an Incident Report or expunge an entire Field Arrest. Expunged records will no longer be visible throughout Online RMS unless the user is granted permissions to view expunged details.

For detailed instructions on expunging records in Online RMS refer to "Expungements" on page 757.

# Chapter 13. Supplement to Incident Reports

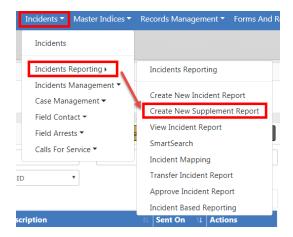
## **Create Supplements**

Once an **Initial Report** is in the system, **Supplement Reports** can be created and attached to the **Initial Report**. The **Initial Report** is designated as Supp#0 and additional Supplements are then added in sequential order (e.g., Supp.#1, Supp.#2, etc.). Create **Supplements** to your own reports or to reports belonging to other users.

A **Supplement** can be entered to a report from your agency, even if the **Initial Report** is not yet completed; however, you cannot create a supplement to a report from another agency unless that **Initial Report** has been approved.

Supplements can be created using different methods:

From the Incidents Menu.

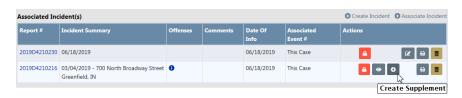


Search for the report by using the provided *Incident Search* screen. You must enter at least one search criteria. For more information on searching for incidents, refer to "View Incident Reports" on page 261.

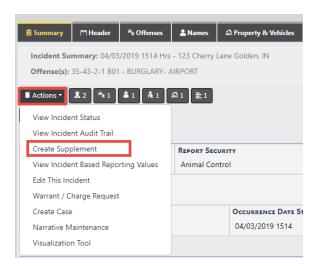
Select the appropriate incident from the search results.

From an existing Case, to which an Incident is associated.

Access the Case, then page down to the *Associated Incident(s)* section. Click on the Create Supplement icon on the appropriate Incident. For more information on Cases, refer to "Case Management" on page 439.



From the Actions menu when viewing an incident report.



Whichever method you choose, a *Confirm Incident Supplement* window appears once you elect to create a Supplement:



Click Generate to continue with creating the Supplement.

There is no Incident Wizard when creating **Supplements** since there are only two minimum requirements which must be met before it can be submitted for approval.

- Reporting Officer for the Supplement
- Narrative

Although these are the two minimum requirements, a user is able to contribute any and all applicable information to a **Supplement** including *Attachments*.

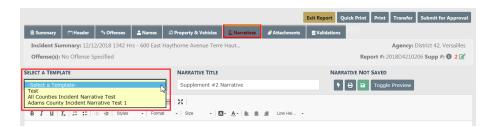
**Note**: The system adds you as a Reporting Officer automatically.

### Supplement Rules

- The **Initial Report** is designated as Supp# 0 and **Supplements** are then added in sequential order (e.g., Supp. # 1, Supp. #2, etc.).
- You can add a supplement that does not include NIBRS reporting data (i.e., add a narrative only) and submit for approval without satisfying any NIBRS validations that may exist from a previous supplement.
- You must be the owner of the Supp to edit it.
- Incidents can only be edited when in Initial Status or Disapproved Status.
- Incidents cannot be edited while in Approved Status.
- Incidents can only be deleted when in Initial Status.

## **Supplement Templates**

Agency Templates can be used when creating the *Narrative* section of the **Supplement**. At the top of the built-in narrative creator, there is a drop-down box labeled **Select a Template** where you can choose a template.



Select a template from the list, complete the narrative, then click **Save.** 

# **Chapter 14. Community Reporting**

## **Community Reporting Overview**

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 form in an existing website using only a couple of lines of HTML code.

With this enhancement, your agency can create their **Community Reporting** public forms using the *Custom Forms* module and making 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 protect communities by offering an alternate method for the public to report minor police reports without the need to dispatch an officer.

**Routing** for available Custom Forms notifies Online RMS users when a new submission occurs. The same review process is used for both public and non-public forms.

There are two ways to take action on submitted forms:

- From a Notification.
- From your Recent Activities.

For more information on taking action, refer to "Taking Action on Submitted Forms" on page 288.

The same method is used for searching and viewing public and non-public Custom Forms. For more information, refer to "Search For and View Custom Forms" on page 63.

**Note:** For details on **Community Reporting** configuration, refer to the Online RMS Admin Guide or your agency administrator.

# Taking Action on Submitted Forms

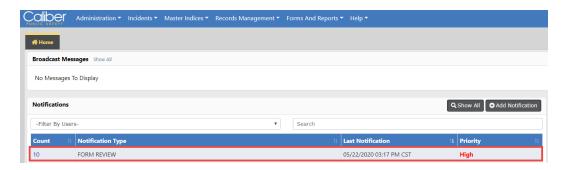
**Routing** for *Publicly or Non-Publicly Available Qustom Forms* notifies Online RMS users when a new submission of a form occurs. Users designated by name or by role on the *Qustom Form* configuration page, by your Online RMS agency administrator, receive a notification every time the public or non-public makes a new submission of a form. The process leverages the existing workflow and power of the Online RMS *Qustom Forms* module. Taking action to review a *Qustom Form* submission is the same for both public and non-public.

There are two ways to take action on submitted forms:

- "Taking Action via Notifications" on page 288.
- "Taking Action via Recent Activities" on page 296.

## **Taking Action via Notifications**

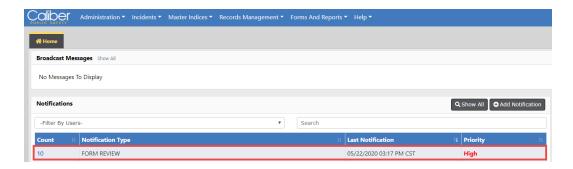
When a new public or non-public form is submitted, a notification appears on the **Online RMS Home Page** within your **Notifications** queue.



The Notification Type for form submissions is FORM REVIEW - FORM NAME

**Note:** For more information on **Notifications**, refer to "Notifications" on page 23.

Follow these steps to review and take action.



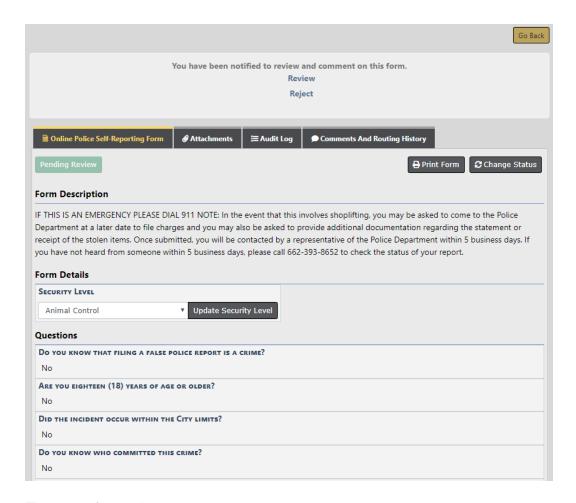
1. Click on the Count hyperlink.

The Notification **Description** begins with the name of the *Custom Form*.

- Use the **Search By** option to filter by **Description** if your agency uses more than one *Custom Form* configured with *Form Review Routing*.



2. Click on the **Take Action** icon **to** open the form.



#### There are four tabs.

- Tab 1 includes the **Information** as submitted by the public.
  - The form opens to this tab by default.
  - This tab is where you **Take Action**.
- Tab 2 includes **Images** submitted by the public or non-public.
  - Click on this tab to review images.
  - Presently, only one image can be uploaded with a public submission. Allowing more images is planned for a future release.
- Tab 3 maintains an **Audit** history of users access to the *Custom Form*.
- Tab 4 maintains Comments and Routing History of the submission and routing actions.

3. At the top section of Tab 1, **Reject** or **Review** (Accept) the form by choosing one of the options below.

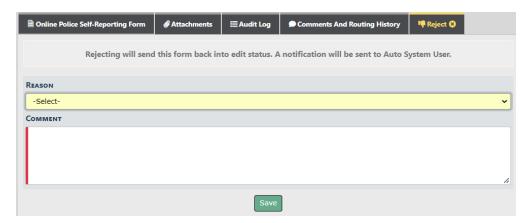


### Reject

1. Click Reject to reject the submission.

It is suggested that you use this option to track that the submission is not consistent with the purpose of the custom form (e.g. does not involve a crime or is an event for which the submission was **not** designed or your agency **does not** wish to track).

2. Select a **Reason** for the rejection and enter a **Comment**.



- 3. Click Save.
- 4. Manually inform the submitter by email or phone call.

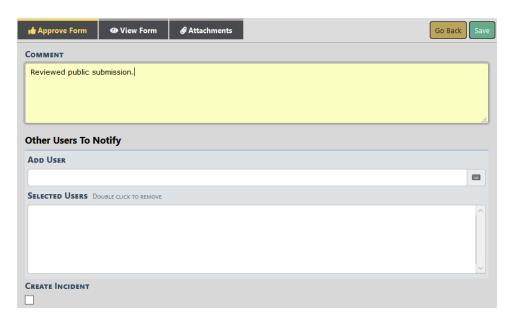
**Note:** Informing the submitter does not happen automatically; this is a manual process.

### Review without a Police Report

Follow these steps when the submission involves an event that does not require a police report. You do, however, want to show the *Custom Form* was **Reviewed** and

### Accepted by your agency.

1. Click Review.

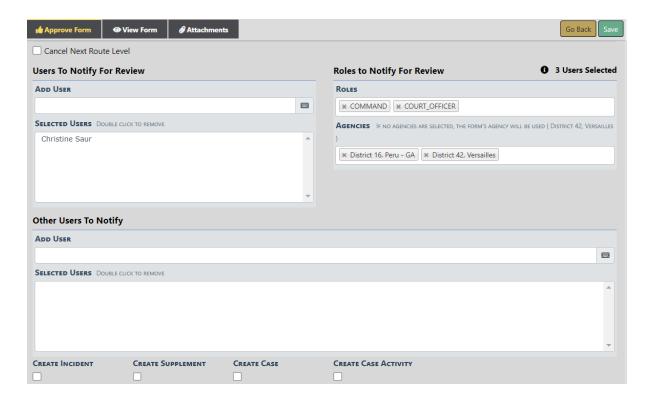


- 2. Enter a Comment.
- 3. Add other Users to notify others from review routes for awareness only.
- 4. Leave the Create Incident box unchecked.
- 5. Click Save.

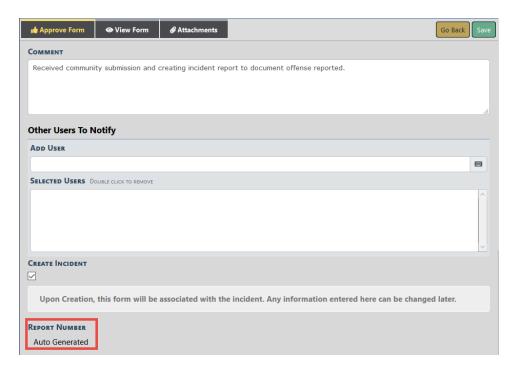
### Review and File a Police Report

Follow these steps when the submission involves a crime or event for which you need to **file an official police report**. Police reports can be associated during the review process, or after approval. In other words, if the form is already reviewed, you can still add associations if you have the appropriate user permissions.

1. Click Review.



- 2. You have the option to Create Incident, Create Supplement, Create Case, or Create Case Activity. (Forms must be enabled for these items to be included as check boxes on the form. This is done by an administrator.)
- 3. To create an incident, check the **Create Incident** box on the *Approve Form* tab.
- 4. To create a supplement, check the **Create Supplement box** on the *Approve Form* tab. (Useres may search for an incident, then select it to create a supplement. It will attach the custom form to that incident within that supplement number.)
- 5. To create a case, check the **Create Case** box on the *Approve Form* tab. (This works much the same way as creating a supplement, and will attach the custom form as an attachment to the case.)
- 6. To create case activity, check the **Create Case Activity** box on the *Approve Form* tab. (Users must first search for a case, then create case activity on that case and attach the form. Attachments are made to the actual case, not the case activity.)
- 7. When you create an incident, depending on the configuration by your agency, the Report Number will either be *Auto Generated* or require *manual entry of a Case Number* requested and obtained from a CAD system, respectively as shown below.





If the Report Number is **Auto Generated** as shown in the first example above, no additional action is required for the Report Number.

If the **Report Number Options** displays as shown in the second example above, enter the **Report Number** based on one of the following options you choose:

- a. The default option is to enter the digits of the Report Number obtained from CAD. RMS then generates the number using the **format defined**.
- b. You can select the option to enter the full # obtained from CAD in the specified format.
- 8. Add Other Users to Notify to notify them for awareness purposes only. If your agency administrator requires at least one user, a note appears in red.



9. Complete the remaining fields on the Approve Form tab.

**Note:** The *View Form* tab easily switches views, to view the Form for information needed to complete the Incident Fields on the *Approve Form* tab.

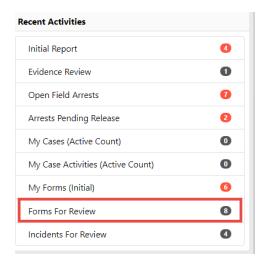
- a. Report Date/Time Default to the system date and time. Update as needed.
- b. **Occurrence Date/Time** Set to the date and time reported by the form submitter.
- c. **Incident Type** This can be set to default to a **Type**, allowing tracking of incident reports originating from a *Publicly or Non-Publicly Available Custom Form*. If defaulted, it is recommended that you do not change the value.
- d. **Summary** This field relates to the Crime/Media Summary field on the incident report.
  - Use the Copy From LOV to select copy text from a Custom Form field to the Summary.
  - Use the LOV multiple times to **copy** information from multiple fields in the *Oustom Form*.
- e. **Responsible User** Default to your name as the creator of the incident report. You can select another user from your agency to assign/transfer the report.
- f. **Narrative** Optional entry. Use this field to quickly create the Narrative for the incident report.
  - Use the Copy From LOV to select copy text from a Custom Form field to the Narrative.
  - Use the LOV multiple times to **copy** information from multiple fields in the *Qustom Form*.
- 10. Click **Save** to create the **Incident Report** and set the **Status** of the *Custom Form* to **Reviewed**.
- 11. A message displays indicating an **Incident Report** was created and the *Custom Form* and Image were automatically associated to the **Incident Report**.



- The user assigned to the incident report can take action to complete the report from their Recent Activities - Initial Report queue.
- Complete the incident report, adding location, offenses, names, and property/vehicles as required.

### **Taking Action via Recent Activities**

As an alternative to taking action via a *Notification*, you can, if you have access to review *Publicly or Non-Publicly Available Custom Forms*, **Take Action** from your *Recent Activities - Forms For Review* queue.



The process of reviewing the Custom Form from *Recent Activities* is the same as taking action from a *Notification*.

For information on accessing Recent Activities, refer to "Home Page" on page 8.

For information on taking action from a *Notification*, refer to "Taking Action via Notifications" on page 288.

**Note:** Once a Form Review is complete by either Accepting (Reviewing) or Rejecting the Custom Form, the notification deletes automatically and the Custom Form no longer appears for review in the Recent Activities - Forms For Review queue.

# **Chapter 15. Criminal Complaint**

## **Criminal Complaint Overview**

The **Criminal Complaint** module allows users, with appropriate permissions, to create and manage criminal complaints against arrestees and offenders, and approve or disapprove through a guided review process before submitting to the state.

Note: To utilize this module, it must be turned on for your agency.

Your agency has the option to utilize a 1 or 2 level approval process:

#### 1-Level Approval Process

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.

#### 2-Level Approval Process

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.

For more information on the approval process, refer to "Approve or Disapprove Criminal Complaint" on page 425.

### **Accessing Criminal Complaint Module**

If turned on for your agency, and you have appropriate permissions, the **Criminal Com- plaint** module is accessible using various methods.

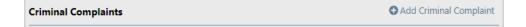
#### Standalone Module

To access the **Criminal Complaint** standalone module, select the **Criminal Complaint** option from the *Incidents* drop-down menu.



### From the Field Arrest

There is a Criminal Complaints section on the Field Arrest, where you can, with appropriate permissions, add a Criminal Complaint or access existing Criminal Complaints.



For more information, refer to "Edit Field Arrest" on page 353.

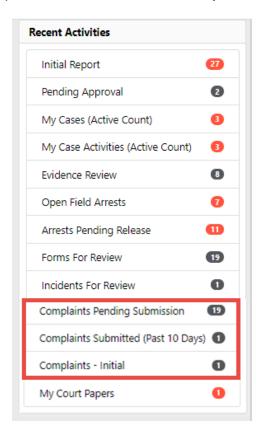
### From the Incident Report

With appropriate permissions, you can add Criminal Complaints from the Actions Menu or the Criminal Complaints grid on the Summary tab of the Incident Report. You can also access existing Criminal Complaints from the Criminal Complaints grid.

For more information, refer to "Summary Tab" on page 247.

### From Recent Activities

For your convenience, any **Initial Complaints**, **Complaints Pending Submission**, and **Complaints Submitted** within a past number of days defined by your administrator, appear under *Recent Activities* on your home page.



Click on an activity to display the result list, for quick access to view or edit a complaint to add Case Number, appearance information and more.

For more information on editing, refer to "Edit a Criminal Complaint" on page 304.

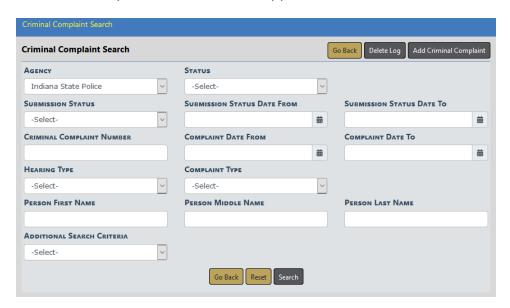
For more information on viewing, refer to "View a Criminal Complaint" on page 311.

# Criminal Complaint Search

To search **Criminal Complaints** follow these steps:

1. Access the *Criminal Complaint* module. For instructions, refer to "Criminal Complaint Overview" on page 297.

2. A Criminal Complaint Search window appears.



Note: Click on the Add Criminal Complaint button to add a Criminal Complaint. For more information, refer to "Add a Criminal Complaint" on page 301.

**Note:** Click on the **Delete Log** button to view the *Criminal Complaint Delete Log*, a listing of deleted Criminal Complaints.

- 3. Enter the search **criteria** into the fields provided. The more criteria you use, the shorter the results list.
  - Select Additional Search Criteria to search on Custom Fields.
- 4. Click the **Search** button to display the search results.



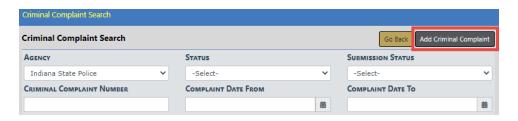
You can, with appropriate permissions, view, edit, and delete **Criminal Complaint** records from the results window.

- Click on the View icon to view. For more information on viewing, refer to "View a Criminal Complaint" on page 311.
- Click on the **Edit icon** to edit. For more information on editing the **Criminal Complaint**, refer to "Edit a Criminal Complaint" on page 304.
- Click on the **Delete icon** to delete, enter a **Comment** at the prompt to explain why you are deleting it, then click **Delete**.

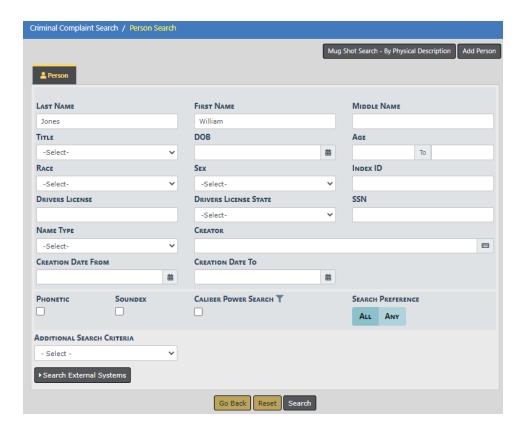
# Add a Criminal Complaint

To add a **Criminal Complaint** record follow these steps:

- 1. Access the *Criminal Complaint* module. For instructions, refer to "Criminal Complaint Overview" on page 297.
- 2. The *Criminal Complaint Search* screen appears. Before adding the criminal complaint, it is recommended you first search for the criminal complaint record to verify whether or not it already exists, though not required. For instructions on how to search refer to "Criminal Complaint Search" on page 299.
- 3. Click on the **Add Criminal Complaint** button on the *Criminal Complaint Search* screen.



4. The *Oriminal Complaint Search / Person Search* screen appears.



5. Enter the appropriate search **criteria** in the fields provided.

For more information on the search criteria options, refer to "Searching Master Records" on page 85.

6. Click the **Search** button to display the search results.

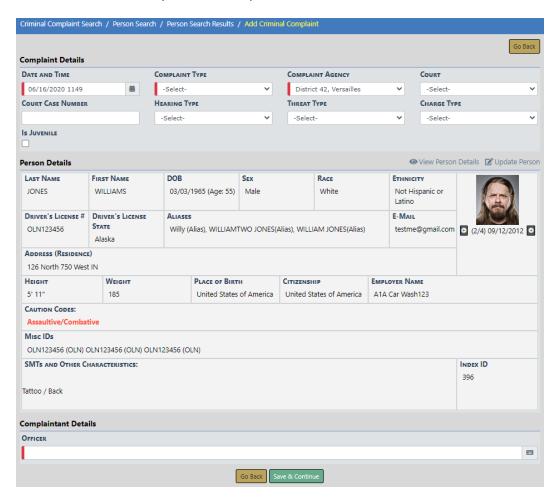


7. Click the **Select icon** to choose the person record you want to associate with the **Criminal Complaint**.

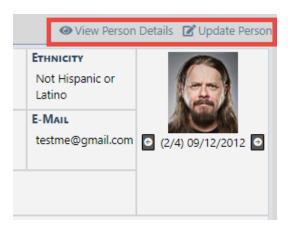
If the person record doesn't exist in the results list, with appropriate permissions, you can click the **Add Person** button to add a *Master Person* record, then select it. For instructions on adding a *Master Person* record, refer to "Adding Person" on page 97.

You have the option to click the **Edit icon** to update the master person record to correct or update person details before you select the record. You also have an opportunity to edit the person details from the *Add Criminal Complaint* screen on the next step.

8. The Add Criminal Complaint form opens.



- **9.** Enter the information in the fields provided.
- 10. Optionally, view or update person details.



- 11. Click the Save & Continue button.
- 12. The Edit Oriminal Complaint form opens.
- **13.** Make the necessary updates. For more information on updating the Criminal Complaint record, refer to "Edit a Criminal Complaint" on page 304.

**Note:** Criminal Complaints may be associated to citations in the same way arrests and incidents are associated in Criminal Complaints.

# **Edit a Criminal Complaint**

To edit a **Criminal Complaint** record follow these steps:

1. **Search** for the Criminal Complaint record you want to edit or access it from **Recent Activities** on your home page.

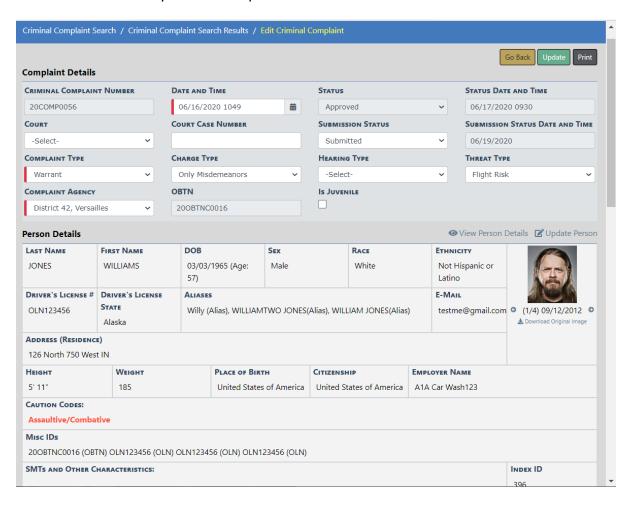
For instructions on how to search refer to "Criminal Complaint Search" on page 299.

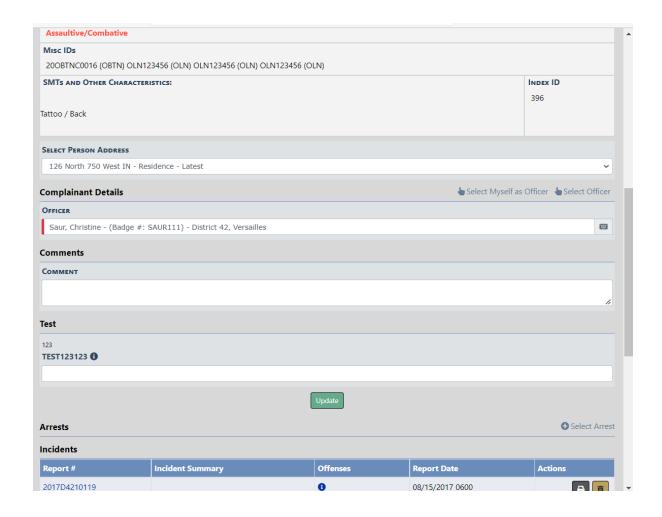
For instructions on accessing from Recent Activities refer to "Criminal Complaint Overview" on page 297.

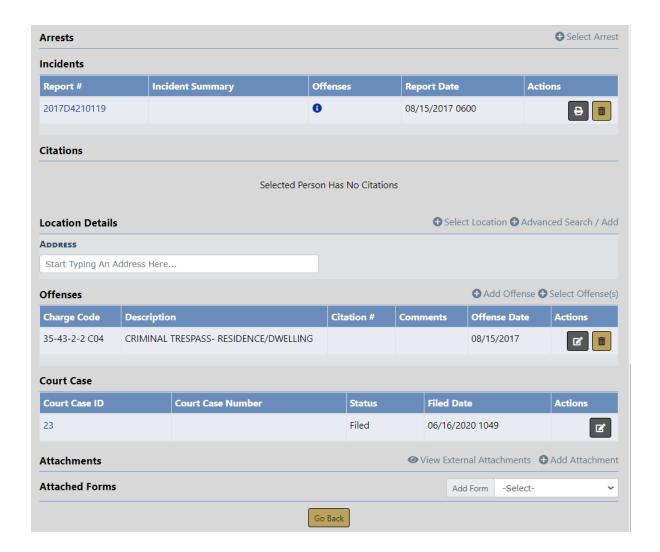
2. In the Search Results grid, click the Edit icon on the record you want to update.



3. The Edit Criminal Complaint form opens.







With Online RMS version 11.5 and higher, certain fields are set as required or disabled and the available **Hearing Type** list of values changes based on the selected **Complaint Type**.

#### Examples:

- If **Complaint Type** = Arrest, then **Charge Type**, Hearing Type and Threat Type list of values become disabled to not allow entry.
- If **Complaint Type** = *Warrant*, then **Charge Type** and **Hearing Type** list of values becomes disabled to not allow entry and **Threat Type** becomes required.

**Note:** Configurations for required and disabled fields are managed by Caliber Admins. If your agency uses Criminal Complaints and would like to use these configurations, please contact Caliber Public Safety Support.

**Note:** Criminal Complaints may be associated to citations in the same way arrests and incidents are associated in Criminal Complaints.

If the Criminal Complaint is associated with a Field Arrest, the **Arrest Tracking Number** displays as read-only. The label could show **Arrest Tracking Number**, or **OBTN**, depending on your agency's configuration.



- 4. Select Person Address from the available choices.
- 5. Select Officer under the Complainant Details section.

The select officer link displays a dialog listing all officers on associated arrests and incidents for quick selection.

You can quickly select any officer associated to the incidents and arrests identified on the criminal complaint record.

Click **Select Myself as Officer** to set the officer as yourself, click **Select Officer** to select an officer from an associated record, or type in the auto-complete field to add any other officer.

Only one officer can be chosen.

- 6. Enter any Comments.
- 7. Make any necessary updates in the available fields near the top of the form, then click the **Update** button to save your changes.
- 8. If applicable, click the **Select Arrest** link to associate an *Arrest* with the Criminal Complaint, based o the Criminal Complaint person's involved records.

Only one *Arrest* can be associated with the Criminal Complaint. The **Select Arrest** link does not display when an *Arrest* association exists.

The OBTN, if initially blank, populates automatically from the associated *Arrest* record.

For more information on arrests, refer to "Field Arrest Overview" on page 339.

**9.** If applicable, click the **Select Incident** link to associate an *Incident* with the Criminal Complaint.

**Note:** The **Select Incident** link only displays if there are incidents where the person on the complaint is the offender.



Only one *Incident* can be associated with the Criminal Complaint.

- a. Select the applicable Incident.
- b. The selected *Incident* displays in the grid. The **Select Incident** link does not display when an *Incident* association exists.



If there is an arrest associated with the incident where the arrestee is the complaint defendant, Online RMS adds the arrest to the complaint, if not already associated. If that arrest has an OBTN, the OBTN is also added to the complaint.

- 10. If applicable, begin typing the address in the Location Details Address field. Select the appropriate address. Existing locations may be removed and new ones added, if needed. You may be prompted to add a county if required by your agency.
- 11. Click Add Offense or Select Offense(s) to include at least one Offense.
  - a. If you choose Add Offense, an Add Offense dialog box appears.



Enter the Charge Code, Offense Date, Offense Time, Citation #, and Comments where applicable.

Click Save.

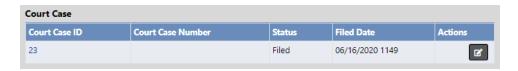
Note: If you enter a charge code that is associated with **Tokens**, additional token fields appear. These tokens submit with each charge if the complaint is submitted to the court.

b. If you choose Select Offense(s), a list appears of offenses that are on the associated Incidents.



**Check** each Offense you wish to include, then click **Save Selected**.

to update any Court Case that may be asso-12. If applicable, click on the Edit icon ciated to the Criminal Complaint.



For general information about Court Case, refer to "Court Case Overview" on page 317.

For more information on updating a Court Case, refer to "Edit Court Case" on page 322.

13. Optionally, add any Attachments

For more information on adding Attachments, refer to "Add Attachments" on page 67.

- **14.** If Applicable for your agency, optionally attach a custom form by selecting from the list under the **Attached Forms** section.
  - a. Once you select a custom form, the form opens. Complete the necessary information then click **Save** or **Save and Exit**.
- 15. If applicable, click on the **Print** button on the top right to print the Criminal Complaint record. A PDF file opens as a new tap in your browser where you can print or save the document. If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.
- **16.** Click the **Submit For Approval** button on the top right, whenever you are ready to submit the Criminal Complaint for approval.

For more information, refer to "Submit Criminal Complaint for Approval" on page 313.

# **View a Criminal Complaint**

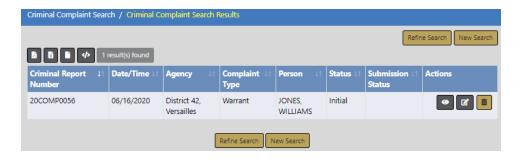
To view a **Criminal Complaint** record follow these steps:

1. **Search** for the Criminal Complaint record you want to view or access it from **Recent Activities** on your home page.

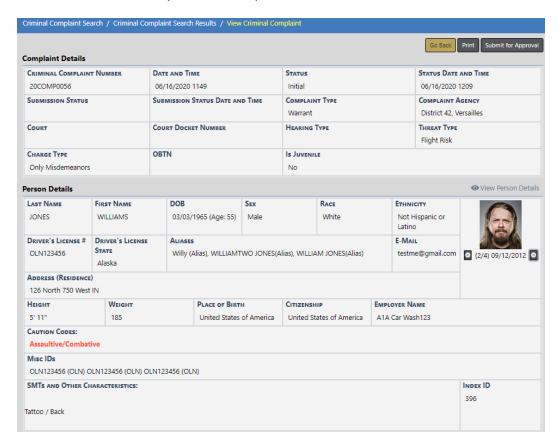
For instructions on how to search refer to "Criminal Complaint Search" on page 299.

For instructions on accessing from Recent Activities refer to "Criminal Complaint Overview" on page 297.

2. In the Search Results grid, click the View icon on the record you want to view.



### 3. The View Criminal Complaint form opens.





Arrests that are associated with the Criminal Complaint appear in a grid near the bottom, similar to Incidents.

View Criminal Complaint is read-only.

For instructions on editing, refer to "Edit a Criminal Complaint" on page 304.

- 4. Optionally, click the **Print** button to print, if applicable; A PDF file opens as a new tab in your browser from where you can print or download. If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.
- 5. Optionally, click on the Incident Report # link or the view icon open the Incident Report associated to the Criminal Complaint.



Click the Submit For Approval button to submit the Criminal Complaint for approval.

For more information, refer to "Submit Criminal Complaint for Approval" on page 313.

# Submit Criminal Complaint for Approval

You can submit a **Criminal Complaint** record for approval two ways:

- From the View Criminal Complaint form.
- From the Edit Criminal Complaint form.

To submit for approval, follow these steps:

1. Access the View or Edit Oriminal Complaint form.

For instructions on viewing, refer to "View a Criminal Complaint" on page 311.

For instructions on editing, refer to "Edit a Criminal Complaint" on page 304.

2. Click on the Submit for Approval button on the top right of the form.



3. A message appears when more information is needed before you can submit the request. If this message does not appear, continue to the next step.

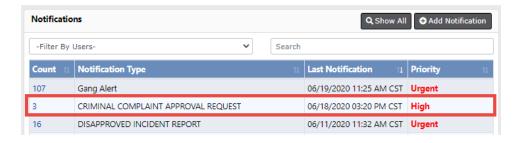


**Note:** The content of the message box varies, as it is based on missing information. (i.e., One charge code required, DOB required, etc.)

- a. Make note of the needed corrections, then click OK
- b. *Edit* the **Criminal Complaint** record to include the missing information. For instructions, refer to "Edit a Criminal Complaint" on page 304. You can then submit for approval from the *Edit Criminal Complaint* page after you have made the appropriate corrections.
- 4. If the Arrest Tracking Number (OBTN) is blank, then a message box appears informing you that this number is required to submit for approval.

Answer Yes to generate the number.

5. Online RMS sets the **Criminal Complaint** status to *Pending Approval* and it generates a *Criminal Complaint Approval Request* notification to users with the role configured for the notification type.



Note: After submitting for approval, and if you have *Review* permissions, Online RMS immediately displays the *Edit Complaint* screen with the **Approve/Disapprove** buttons allowing for self-approval. If you also have *Submit* permissions and your agency is configures for court submissions, the **Approve & Submit** button displays.

- If the complaint is **Disapproved**, Online RMS generates a notification to the creator of the Criminal Complaint. The creator has the option to resubmit for approval. For more information, refer to "Take Action on Disapproved Notifications" on page 315.
- If the complaint is **Approved**, Online RMS creates a Court Case automatically, providing your agency has the Court Case module turned on. For more information on Court Cases, refer to "Court Case Overview" on page 317.

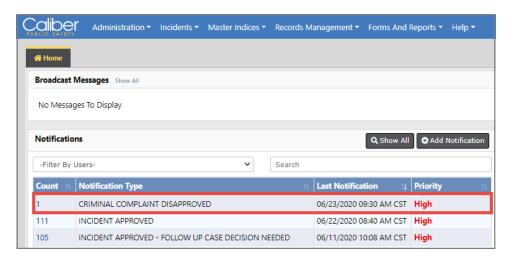
**Note:** For users with a printed criminal complaint, on submission to the court, a PDF of the printed complaint will be generated automatically and attached to the criminal complaint itself.

- If the approved complaint data is **Submitted** to the court and is **successful**, the *Submission Status* on the Criminal Complaint changes to *Submitted* automatically.
- If the approved complaint data is **Submitted** to the court and is **unsuccessful**, the *Submission Status* on the Criminal Complaint changes to *Submission Error* automatically. You can review and update the Criminal Complaint as needed, then resubmit. For more information on court submissions, refer to "Approve or Disapprove Criminal Complaint" on page 425.

For information on the approval process, refer to "Approve or Disapprove Criminal Complaint" on page 425.

## Take Action on Disapproved Notifications

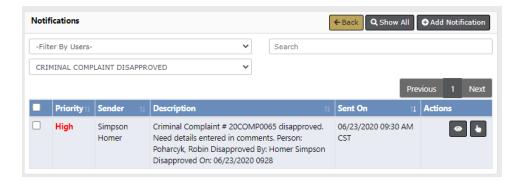
If the supervisor *Disapproves* your *Criminal Complaint Request for Approval*, Online RMS generates and sends you a **Disapproved** notification.



For more information on Notifications refer to "Notifications" on page 23.

Follow the steps below take action on the notification:

1. Click on the **Count** in the first column of the notification grid to view the *Criminal Complaint Disapproved* list. There is only one in this example.



- 2. Click the **Select icon** on the Criminal Complaint record to open *Edit Criminal Complaint*.
- 3. Review and make the appropriate changes, then click the **Update** button.

For instructions on editing, refer to "Edit a Criminal Complaint" on page 304.

4. Click on the Submit for Approval button on the top right of the form.



For more information on submitting for approval, refer to "Submit Criminal Complaint for Approval" on page 313.

# Chapter 16. Court Case

### **Court Case Overview**

The **Court Case** module allows users, with appropriate permissions, to create and manage court cases against arrestees and offenders.

### Accessing the Court Case Module

The **Court Case** module must be turned on for the agency, and users with appropriate permissions can access it using various methods.

#### Standalone Module

To access the standalone **Court Case** standalone module, select the **Court Cases** option from the *Incidents* drop-down menu.



For information on searching for a **Court Case**, refer to "Court Case Search" on page 318

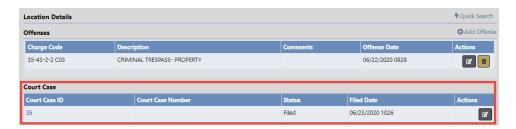
### From the Criminal Complaint

You can access Court Cases that are associated with Criminal Complaints.

1. Access the appropriate Criminal Complaint.

For more information on accessing, refer to "Criminal Complaint Overview" on page 297.

2. On the Criminal Complaint record, page down to the Court Case section.



3. Click the Court Case ID link to view the record, or click the Edit icon to update the Court Case record.

For more information on updating the **Court Case** record, refer to "Edit Court Case" on page 322.

### From the Incident Report

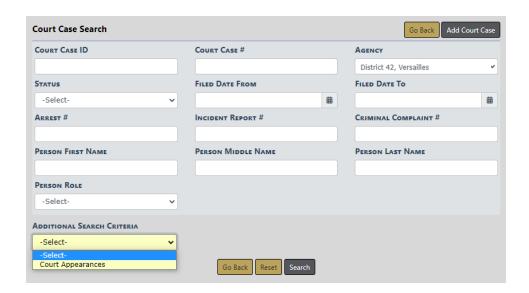
You can create or view associated **Court Cases** while viewing or editing an Incident Report.

For details, refer to "View Incident Reports" on page 261 and "Summary Tab" on page 247.

### Court Case Search

To search **Court Cases** follow these steps:

- 1. Access the standalone *Court Case* module. For instructions, refer to "Court Case Overview" on page 317.
- 2. A Court Case Search window appears.



**Note:** You can click on the **Add Court Case** button to add a **Court Case**. For more information, refer to "Court Case Add" on page 320

Enter the search criteria into the fields provided. The more criteria you use, the shorter the results list.

You can also search by **Court Appearances** located in the *Additional Search Oriteria* drop-down list. Additional search fields appear when choosing this option.

4. Click the **Search** button to display the search results.



**Note:** If you elect to include Court Appearances in your search, the results list will also include various Court Appearance fields such as, ID, date, type, status, reason, and officer.

You can, with appropriate permissions, view, edit, and delete **Court Case** records from the results window.

• Click on the View icon to view. For more information on viewing, refer to

- Click on the **Edit icon** to edit. For more information on editing the **Court Case**, refer to .
- Click on the **Delete icon** to delete, enter a **Comment** at the prompt to explain why you are deleting it, then click **Delete**.

### **Court Case Add**

There are two ways to add a Court Case:

- Through the standalone Court Case module.
- Through the Criminal Complaint module, if your agency has the module turned on.
  - The Court Case is created automatically from the Criminal Complaint when it is approved. The information from the Criminal Complaint pulls into the Court Case record automatically.

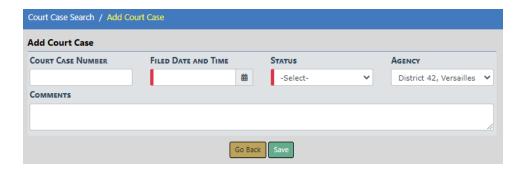
For more information on Criminal Complaint, refer to "Criminal Complaint Overview" on page 297.

To add a **Court Case** record follow these steps:

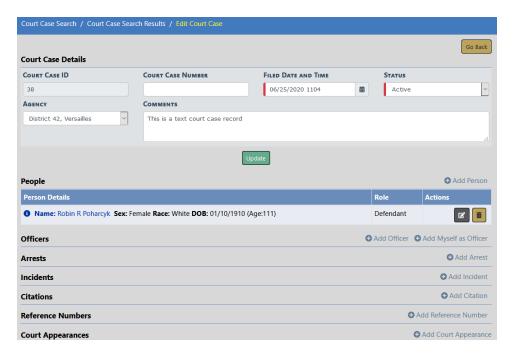
- 1. Access the standalone *Court Case* module. For instructions, refer to "Court Case Overview" on page 317.
- 2. The Court Case Search screen appears. Before adding the court case, it is recommended you first search for the court case record to verify whether or not it already exists, though not required. For instructions on how to search refer to "Court Case Search" on page 318.
- 3. Click on the Add Court Case button on the Court Case Search screen.



4. The Add Court Case screen appears.



- Enter the appropriate information in the fields provided.
- 6. Click Save.
- 7. The Edit Court Case screen appears.



- **8.** Optionally, make the necessary changes in the fields provided on the top section of the screen, then click **Update**.
- **9.** Optionally, add other data to the **Court Case**, such as People, Officers, Arrests, Incidents, Reference Numbers, Court Appearances, and Attachments.

For more information, refer to "Edit Court Case" on page 322.

### **Edit Court Case**

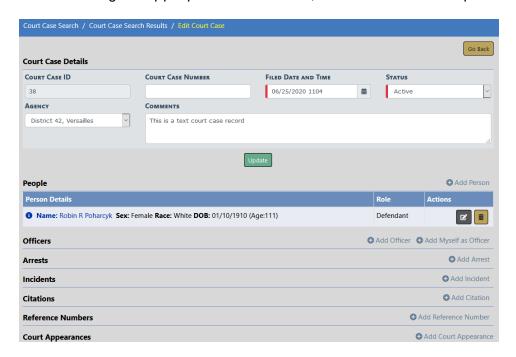
To edit a **Court Case** record follow these steps:

1. Access the Court Case record you want to edit.

You can access the record by searching for the **Court Case**, or by accessing the Criminal Complaint record to which a **Court Case** is associated.

For more information on the different methods of accessing the **Court Case**, refer to "Court Case Overview" on page 317.

2. After selecting the appropriate **Court Case**, the *Edit Course Case* opens.



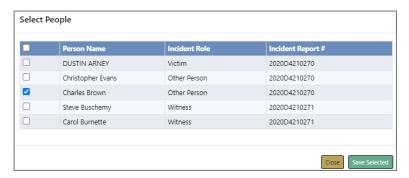
Click the Select People or Add Person link to add one or more people to the Court Case.



**Note:** The Person grid only shows a **Select People** link if there are associated incidents.

#### Select People:

a. Choose the appropriate people from the list that appears.

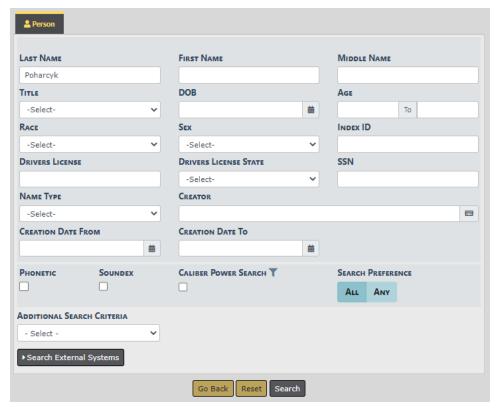


- b. Click Save Selected.
- c. The people you added now appears under the *People* section of the *Edit Court Case* screen.

With appropriate permissions, you can edit the person record, or delete trom the **Court Case**. Deleting does not delete the person record itself, it removes the association only.

#### Add Person:

a. The Person Search screen appears.



b. Enter the search criteria, then click **Search** to display the search results.



c. Click the **Select icon** on the appropriate person record to add the person to the **Court Case**.

**Note:** If the person you want to add to the **Court Case** does **not** exist in your search, with appropriate permissions you can add the master person to Online RMS, then add that person to the **Court Case**.

For more information on master indices, refer to "Master Indices Overview" on page 81.

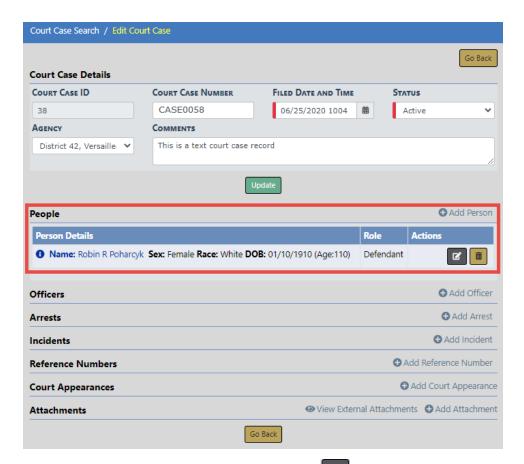
For more information on searching master records, refer to "Searching Master Records" on page 85.

For more information on adding a master person index record, refer to "Adding Person" on page 97.

d. After selecting the appropriate person, the **Add Person** screen appears.



- e. Select the **Person Role** for that person.
- f. Click Save.
- g. The person now appears under the People section of the Edit Court Case screen.



With appropriate permissions, you can edit the person record, or delete it from the **Court Case**. Deleting does not delete the person record itself, it removes the association only.

**4.** Optionally, add other associations to the Court Case, such as Officers, Arrests, Incidents, Citations, Reference Numbers, Court Appearances, and Attachments.

**Note:** For more information on Court Appearances, refer to "Court Appearances Overview" on page 329.

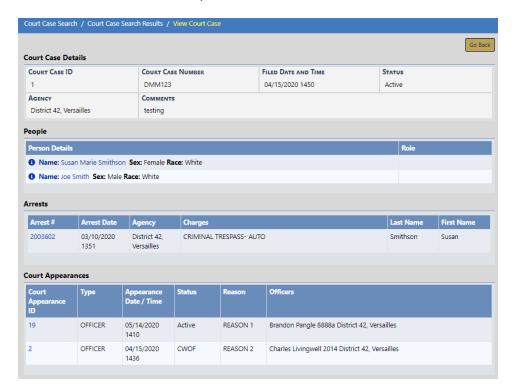
# **View Court Case**

To view a **Court Case** record follow these steps:

- 1. **Search** for the Court Case record you want to view. For instructions on how to search refer to "Court Case Search" on page 318.
- 2. In the Search Results grid, click the View icon on the record you want to view.



3. The View Court Case form opens.



*Mew Court Case* is read-only. For instructions on editing, refer to "Edit Court Case" on page 322.

**4.** Optionally, click on the person name, Arrest ID, Court Appearance ID, etc., to view details.



# **Chapter 17. Court Appearances**

## **Court Appearances Overview**

**Court Appearances** are added through the Court Case module. A Court Appearance cannot exist without a Court Case.

## **Accessing Court Appearances**

### From the Incidents Top Menu

Select Court Appearances from the Incidents drop-down menu.



You must have *Manage Court Appearances* permissions to see the **Court Appearances** option on the list.

The Search Court Appearances form opens. Search for and select the Court Appearance record.

For information on searching **Court Appearances**, refer to "Court Appearances Search" on page 332.

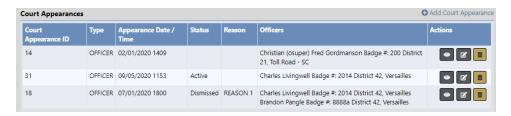
#### From the Court Case

Court Appearances are associated to Court Cases.

1. Access the appropriate Court Case.

For more information on accessing Court Cases, refer to "Court Case Overview" on page 317.

2. On the Court Case record, page down to the **Court Appearances** section.



#### From Recent Activities

For your convenience, you can quickly open a list of your upcoming **Court Appearances** from *Recent Activities* on your Home Page.



1. Click on My Court Appearances under Recent Activities.



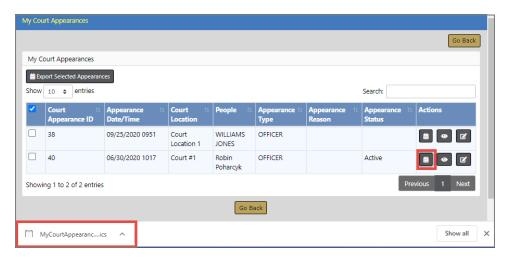
- 2. Click the View icon to view the Court Appearance as read-only. For more information on viewing, refer to "View Court Appearances" on page 338.
- 3. Click the Edit icon to update the Court Appearance. For more information on updating, refer to "Court Appearances Edit" on page 336.

You must have Manage Court Appearances permissions to edit Court Appearances.

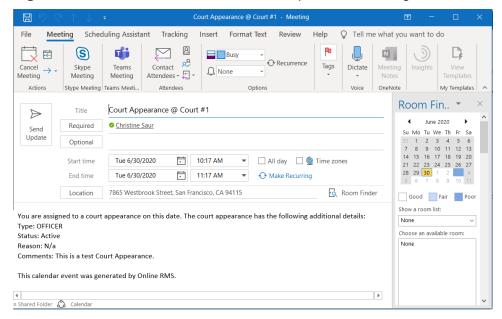
- **4.** Optionally, add the Court Appearance to your **calendar**. You can add multiple to your calendar at once, or one at a time.
  - a. For **multiple** Court Appearances, **check** all that apply, then click **Export Selected Appearances** to download all selected schedules to one ics file.



OR, for **one** Court Appearance, click the **calendar** button to download an *ics file* for that specific Court Appearance.



b. Right click on the downloaded ics file to open the meeting notice.



c. Update the notice if needed, then click **Send Update** to add it to your calendar.

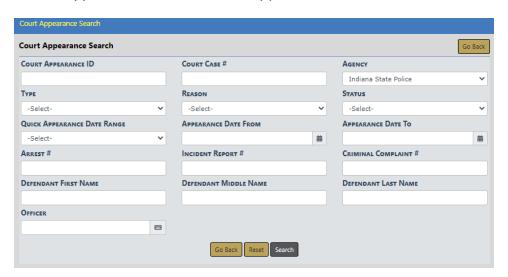
**Note:** You must remove the notice from your calendar manually once it is added.

# Court Appearances Search

To search **Court Appearances** follow these steps:

1. On the top menu bar, click **Incidents**, then **Court Appearances**. For instructions, refer to "Court Appearances Overview" on page 329.

2. A Court Appearance Search window appears.



- 3. Enter the search **criteria** into the fields provided. The more criteria you use, the shorter the results list.
- 4. Click the **Search** button to display the search results.



You can, with appropriate permissions, view or edit **Court Appearance** records from the results window.

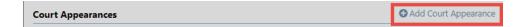
- Click on the **View icon** to view. For more information on viewing, refer to "View Court Appearances" on page 338.
- Click on the **Edit icon** to edit. For more information on editing, refer to "Court Appearances Edit" on page 336.

# **Court Appearances Add**

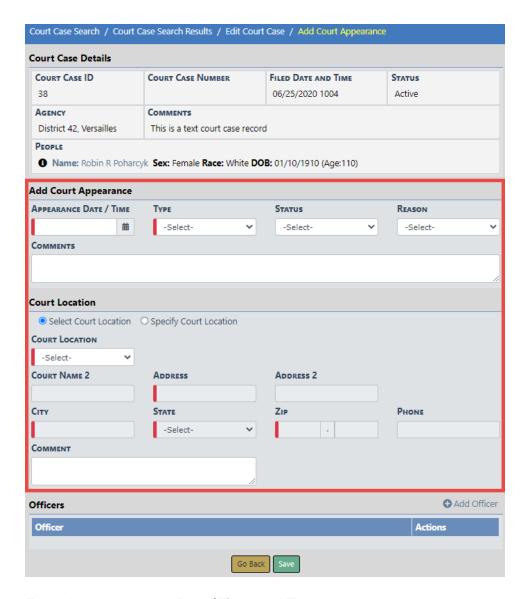
Court Appearances are associated to Court Cases.

To add a **Court Appearance** to a Court Case, follow these steps:

- 1. Access the standalone Court Case module. For instructions, refer to "Court Case Overview" on page 317.
- 2. The Court Case Search screen appears. Search for and select the appropriate Court Case record. For instructions on how to search refer to "Court Case Search" on page 318.
- 3. On the Court Case record, page down to the Court Appearances section, then click Add Court Appearance.



4. The Court Case opens in edit mode, with an Add Court Appearance section.



- 5. Enter the appearance Date/Time and Type
- 6. Optionally, select the Status and Reason, and enter Comments.
- 7. For the **Court Location**, choose one of the following:
  - a. **Select Court Location** to choose a court location from a drop down list. The address populates automatically for you. This option is selected by default.
  - b. **Specify Court Location** to manually enter the address.
- 8. Optionally, enter a **Comment** for the Court Location.
- Click the Add Officer link to add at least one officer. Either a list of officers on the Court Case appears from which you choose, or you can enter an officer, whichever applies.

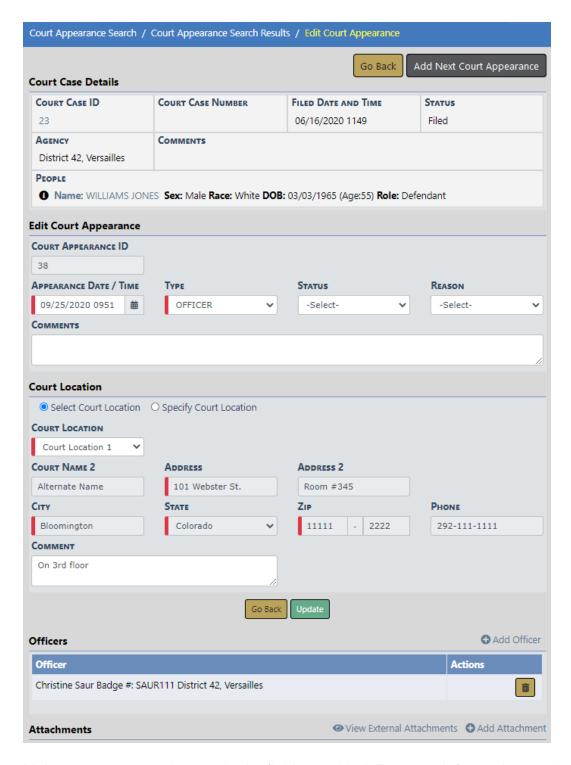
10. Click Save to save the Court Appearance to the Court Case.

# **Court Appearances Edit**

You must have Manage Court Appearances permissions to edit Court Appearances.

To edit a **Court Appearance**, follow these steps:

- 1. Search for the Court Appearances record, from the Court Appearances standalone module or from the Court Case. For more information, refer to "Court Appearances Overview" on page 329.
- 2. Click on the Edit icon to open the Edit Court Appearance form, with the Court Case Details shown at the top as read-only.



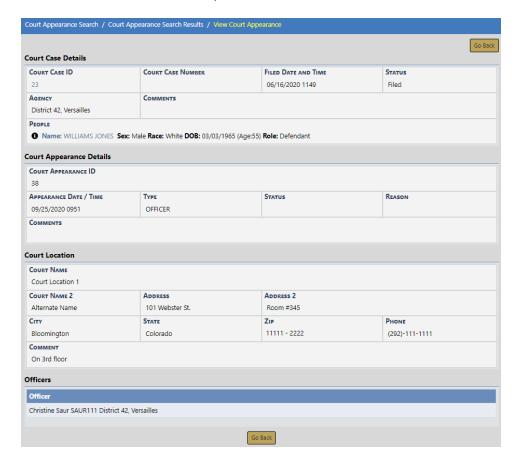
- 3. Make any necessary changes in the fields provided. For more information on the available fields, refer to "Court Appearances Add" on page 334.
- 4. Click the **Update** button to apply your changes.
- 5. Optionally, click the Add Officer link to add an officer, then click Save.

- 6. Optionally, Add Attachments.
- 7. Optionally, click the **Add Next Court Appearance** button on the top right of the form to schedule the next court appearance.

## **View Court Appearances**

To view a **Court Appearance** as read-only, follow these steps:

- Search for the Court Appearances record, from the standalone module or from the Court Case. For more information, refer to "Court Appearances Overview" on page 329.
- 2. Click on the **View** icon to open the *View Court Appearance* form, with the Court Case Details shown at the top.



Changes cannot be made to the data on this form while in view mode. For instructions on updating the data, refer to "Court Appearances Edit" on page 336.

# **Chapter 18. Field Arrest**

### Field Arrest Overview

The **Field Arrest** module can be used to document the necessary information associated with an arrest. Once you select a person from the **Master Indices** or create a new person record, you can edit the **Field Arrest** information. The **Field Arrest** can stand alone or it can be associated to an Incident Report.

Beginning with Online RMS 11.4.0, you can add a **Criminal Complaint** associated to a **Field Arrest**, providing you have the appropriate permissions and the feature is turned on.

**Hunter Camera** integration allows Online RMS to send a message to a virtual camera on our local machine, then receive pictures back and post to the Online RMS *Master Person Index* record.

**Livescan** integration transmits the most recent arrest and arrestee information from the *Master Person Index* to **LiveScan**.

Beginning with Online RMS 11.7.0, with appropriate permissions, you can create a Field Arrest and import data from an existing Incident or Calls for Service record into the arrest record, avoiding unnecessary data entry. This process also associates the Field Arrest to the Incident or Calls for Service record automatically.

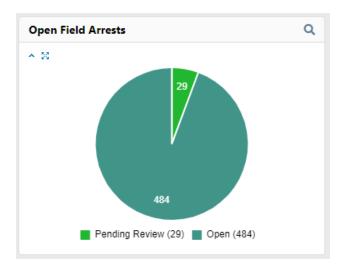
### **Recent Activities**

Certain **Field Arrest** links appear under Recent Activities on your Home page. The below example shows two examples.



For more information about Recent Activities, refer to "Home Page " on page 8.

With proper permissions you can also view a Field Arrest Chart on your Home Page that shows a count of those that are open and pending review. Refer to "User Information Menu" on page 43 for information on adding the Field Arrest Chart to your Home Page.



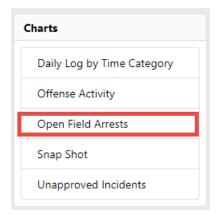
Click on the magnifying glass on the upper right of the pie chart to open the static bar chart as a separate tab.





You can move between your Home Page and the chart by clicking on the associated tab, allowing you to keep the Open Field Arrests tab open until you close it.

**Note:** You can also open the static bar chart as a separate tab by clicking on **Open Field Arrests** under the *Charts* section of your Home Page.



Click Refresh to include the most current data since you've last opened the chart.

Click on the X to close the tab.

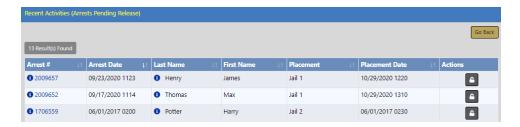
### **Open Field Arrests**

Click on the link to view a list of arrests that are open. You can then edit a **Field Arrest** that appears on the list.

### Field Arrests Pending Release

Agencies using Field Arrests and having a **Disposition** configured with a **Status Code** of *Complete Without Release*, displays an **Arrests Pending Release** link under Recent Activities.

Click on the link to view a list of arrests that are pending release.



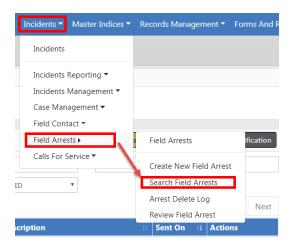
Click on the release icon on the right to release the Field Arrest to open the Release Field Arrest form.

On the Release Field Arrest form, change the **Disposition** to Released, then click the **Update Disposition** button.

## Search Field Arrests

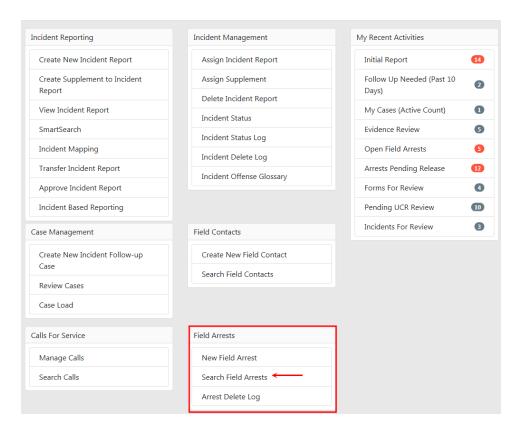
To view or edit an existing **Field Arrest** you must first **Search** for the record. There are two ways to search, either method will open the **Search Field Arrests** screen:

 Click on the Incidents drop-down menu on the top Navigation Bar, click on Field Arrests, then Search Field Arrests.

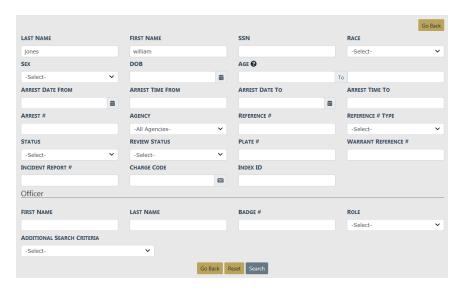


• Or, click the **Incidents** label on the top Navigation Bar, click Incident on the submenu, then click the **Search Field Arrests** link.





After choosing one of the two search methods, the Field Arrest Search screen appears. Enter the search criteria then click **Search** to display the *Search Results*. Click the **Reset** button to clear the entered criteria if you wish to start over.





From the Search Results window, you have the ability to export the search results to various file types using the four icons directly above the Search Results grid. For more information on exporting search results refer to "Export Search Results" on page 35.

Click the **Arrest Number** link to view the *Field Arrest*, click the **Edit** icon to update the *Field Arrest*, or click the **Delete** icon to delete.

For more information on editing the **Field Arrest** refer to <u>FieldArrestEdit.htm</u>.

For more information on deleting a **Field Arrest** refer to "Delete Field Arrest" on page 384.

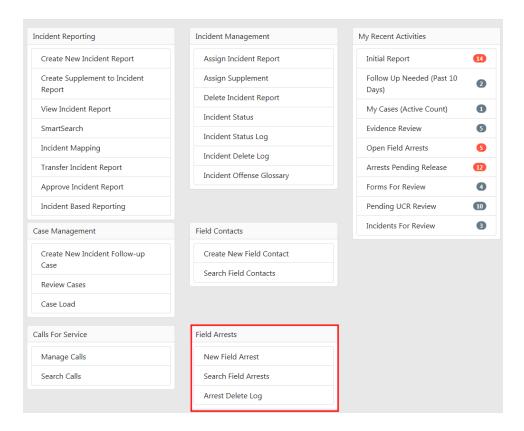
**Note**: The **Edit** and **Delete** icons are available if you have proper permissions to perform that action. Refer to your administrator for more information on permissions.

Click the **Refine Search** button to return to the *Field Arrest Search* form to update the criteria you initially entered, or click **New Search** to enter new criteria.

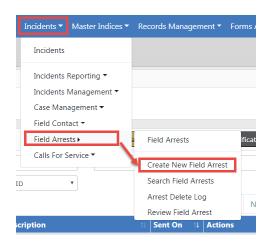
## **Create Field Arrest Manually**

To create a new **Field Arrest** manually, select *New Field Arrest* from either the Incidents menu or the Incident drop-down on the top Navigation Bar.



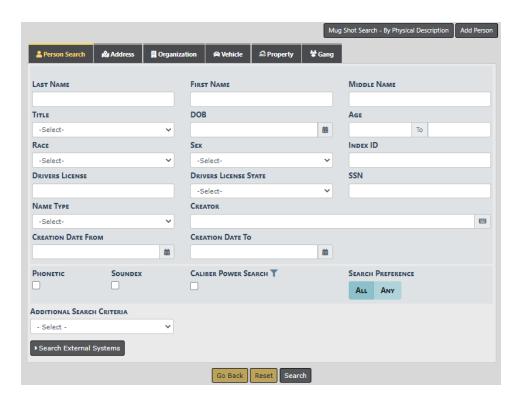


#### OR



**Note:** You can also create a Field Arrest from an Incident and import the Incident data. For details, refer to "Create Field Arrest from Incident" on page 263.

1. The **Person Search** screen opens. This searches through the *Master Person Index* records to locate existing records that match your entered criteria.



- Search for the person or use the Add Person button on the upper right to add the person.
- 3. Once the *Person Search Results* screen appears, use the Select icon to select the correct person.



From the *Person Search Results* window, you have the ability to export the search results to various file types using the four icons directly below the *Search Results* tab.

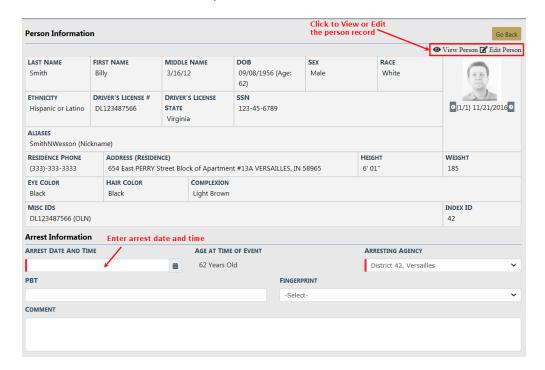
For more information on exporting search results refer to "Export Search Results" on page 35.

For more information on searching *Master Person Index* records, refer to "Master Indices" on page 81.

**4.** If the person **is associated** to existing Incident or Calls for Service records, the *Field Arrest Quick Booking* screen appears, otherwise skip this step.



- Offender information and photo, if available, appears on the left of the screen.
- This screen allows you to optionally import data from either an Incident or Calls for Service record, or create an Arrest without importing data. To Import Incident or Call for Service data, refer to "Create Field Arrest and Import Data" on the facing page.
- a. Click on the Create Arrest Without Importing button to create the Field Arrest manually.
- b. Proceed to the next step.
- 5. The Add Field Arrest screen opens.



- a. Verify the information under *Person Information* to be accurate. Enter the **Arrest Date** and **Time**, **PBT**, and **Comments**.
- b. Click the **Edit Person** link to add or update person information if needed.

- Click the Save button after updates are complete to return to the Add Field Arrest screen.
- c. Click the Save button on the Add Field Arrest screen to save the entered data.
- **6.** The *Edit Field Arrest* screen opens.

For more information on editing a Field Arrest, refer to "Edit Field Arrest" on page 353.

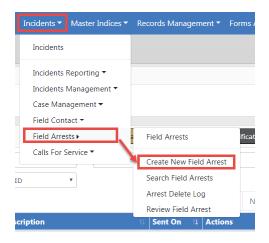
# **Create Field Arrest and Import Data**

Beginning with Online RMS 11.7.0, with appropriate permissions, you can create a Field Arrest and import data from an existing Incident or Calls for Service record into the arrest record, avoiding unnecessary data entry. This process also associates the Field Arrest to the Incident or Calls for Service record automatically.

Follow these steps to create a Field Arrest and import the data:

1. Initiate a new Field Arrest from the Incident top menu.

Note: If you are creating a Field Arrest from an Incident record, skip to Step
6. For more information on creating an arrest form an Incident, refer to "Create Field Arrest from Incident" on page 263.



2. Search for and select the person.

For more details on searching and selecting the person, refer to the first few steps of "Create Field Arrest Manually" on page 345.

3. If the person you select is associated with existing Incident or Calls for Service records, the Field Arrest Quick Booking screen appears.



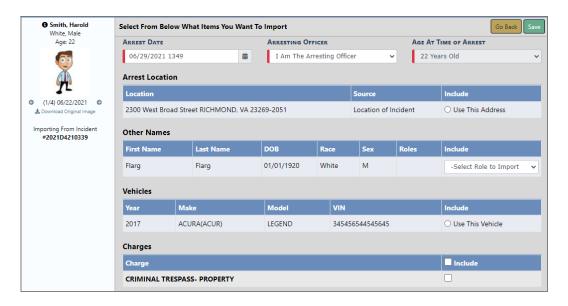
- Offender information and photo, if available, appears on the left of the screen.
- This screen allows you to optionally import data from either an Incident or Calls for Service record, or create an Arrest without importing data. To create an Arrest without importing, refer to "Create Field Arrest Manually" on page 345.

If the person you select is **not associated** with existing Incident or Calls for Service records, the Add Field Arrest screen opens rather than the above. You must manually enter Field Arrest data. For instructions, begin with the Add Field Arrest section of "Create Field Arrest Manually" on page 345.

4. Select either Quick Arrest From Incident or Quick Arrest From Call For Service.

The data that displays in the grid changes based on your selection.

- The grid displays the Incidents or Calls for Service records to which this person belongs, and only those records that you have permissions to see within your organization.
- If you select Incident, and do not have permissions to access an Incident Supplement to which the offender is associated, that Incident does not appear in the grid.
- 5. Select the appropriate record in the grid to import.
- **6.** The *Import and Oreate Field Arrest* screen appears.



- The person's name and other information appear on the left along with a photo, if one exists.
- The data source appears under the person's photo:
  - Importing from Incident or Importing from Dispatch.
  - The Incident or Dispatch number.
- People and Addresses:
  - If importing data from an Incident, the people and addresses have Master Person and Address Indices records.
  - Calls for Service people and addresses may not have Master Person and Address Indices records; however, you are given the option to create them.
- The fields prepopulate with Information from the data source automatically; however, you can make any necessary changes.
- The Arrest Date defaults to today's date. Click into the field and select another date if needed.
- 8. The Arresting Officer defaults to the logged in user. Other officers defined in the data source also appear on the list. To change to another officer, click into the field and select the appropriate officer from the list.
- **9. Age at Time of Arrest** is calculated for you based on the offender's birth date. This field is read-only.

**10.** Locations defined in the data source are listed under **Arrest Location**. If multiple locations exits in the data source, they all appear here.

Incident and Calls for Service location data are handled differently during the import process:

- Incident Locations are Master Address Index records. Click Use This Address to choose a location.
- Calls for Service Locations may not be Master Address Index records. If not, the Create Address button appears.



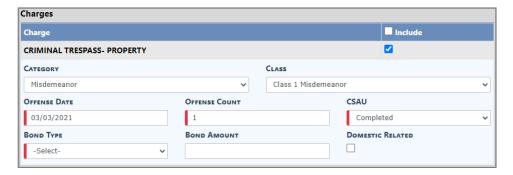
Click the **Create Address** button to create the Master Address Index record, then the button changes to **Use This Address**.

- 11. Other Names and Victim Names also appear on this screen, depending on whether or not they exist in the data source. The example used only shows Other Names.
  - On each name, click the drop-down box to select which **Role to Import**.
  - When importing CFS data, the Create Person button appears if the person is not a Master Person Index record. Click the button to create the Master Person Index record, then you can select the Role to Import.



- When creating a new person, the import process also updates the CFS event person record with the Master Person Index.
- **12.** Select the **Vehicle**, if applicable.
- 13. Select the **Charge**, if applicable.

Additional fields appear.



- a. Arrest charges have bond fields that the Incident doesn't.
- b. Select the **Bond Type** and enter the **Bond Amount**.
- c. Update other fields as needed.

#### 14. Click Save.

#### 15. Incidents only:

If you are importing Incident data outside of an Incident and *you have* an existing open Supplement:

- a. The process creates the Field Arrest.
- b. The process associates the Field Arrest to the open Supplement and the role of *Arrestee* is added to the offender.

#### OR

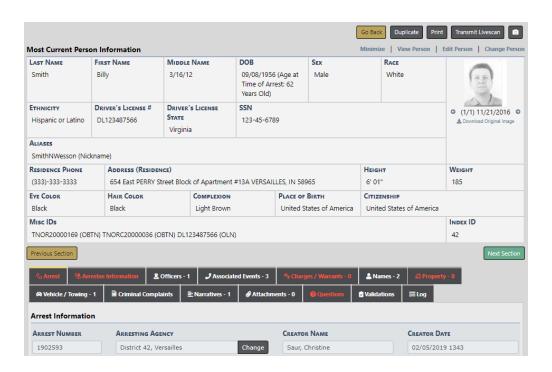
If you are importing Incident data outside of an Incident and you do not have an existing open Supplement:

- a. A prompt appears asking if you want to create a Supplement.
  - If **Yes**, then the process creates the Field Arrest, associates it within the Supplement, and adds the role of *Arrestee* to the offender.
  - If **No**, then the process associates the Field Arrest to whatever Supplement the offender was added, and the role *Arrestee* is *not added* to the offender.
- 16. The Edit Field Arrest screen opens.
- 17. Make any necessary changes to the Field Arrest record.

For more information on editing a Field Arrest, refer to "Edit Field Arrest" below.

## **Edit Field Arrest**

The Edit Field Arrest screens allows you to enter details of the Field Arrest.



There are action buttons on the top right of the Edit Field Arrest screen.

**Note:** Certain buttons may not be visible, depending on your agency's configuration.



- Go back Return to the previous screen.
- Duplicate Duplicate the Arrest record for each Arrestee systematically to avoid duplicate manual entry.

For more information, refer to "Duplicate Field Arrest" on page 382.

• **Print** - After the **Field Arrest** form is complete, you can print a *Field Arrest Report* from this page.

For details, refer to "Print Field Arrest" on page 387.

• **Camera** - After the Arrest record is complete, take a photo using *Hunter Camera*. Depending on your agency's configuration, there may be one or multiple cameras from which to choose.





For details on using the camera software, refer to "Hunter Camera" on page 818.

 Transmit Livescan - After the Arrest record is complete, transmit the most recent physical description and the person images associated with that physical description to LiveScan.

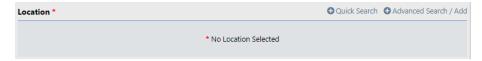
For details on using the LiveScan software, refer to "LiveScan" on page 821.

Individual tabs located in the center of the *Edit Field Arrest* screen organize the **Field Arrest** details.



You may wish to minimize the *Person Information* box so it is easier to go through your report. Do this by selecting **Minimize** at the top of the screen.

- If you haven't already, add the Location. The location pulls from the Master Address Index. The recommendation is to always search for an existing Master Address record before adding a new one to prevent duplicates. The Location is required.
  - a. Click the **Quick Search** link to open the *Quick Search* window.



You have the option to search by the street address only, or by separate fields that make up an address such as street number, street name, city, etc.



#### OR

Quick Search			
SEARCH TYPE Sel	ect Postal to search by indiv	dual fields	
STREET #	DIRECTION	STREET NAME	TYPE
1001	-Direction-	Main	-Type-
CITY	INTERSECTING STREET	INTERSECTING STREET TYPE	PE
	NAME	-Type-	•
	Reset	Search	
cl.			
Show 10 \$ ent	ries		
Index ↑↓ Address			ommon Place 🏗 Actions 🏗
14 1001 Nor	1001 North East Main Street		
Showing 1 to 1 of 1 er	ntries	First	Previous 1 Next Last
			Close Advanced Search / Add

**Note**: If the **Location** you are looking for does not exist, click the **Advanced Search/Add** button to add it to the **Master Address Index**. For more information on adding a Master Address index record, refer to "Master Indices" on page 81.

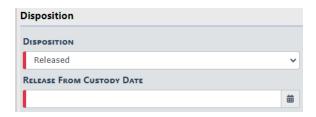
- b. Click the Select icon 🖢 to select the **Location** you want to add.
- c. Only one location is associated to an arrest record. When you select a location, the Quick Search and Advanced Search/Add buttons change to view, edit, and remove location:



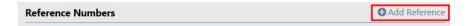
d. Click the View Location button to view details of that address.

- e. Click **Edit Location** to change the address data, or click **Remove Location** to remove the location from the arrest record.
- 2. Give the field arrest a **Disposition**: Based on what is selected, there are additional boxes that need to be completed as shown in the example below:

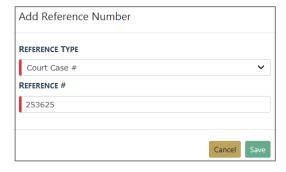




3. Click the **Add Reference** link to add a Reference Number in the *Add Reference Number* window if applicable.



4. Enter the appropriate Reference information and click the **Save** button.



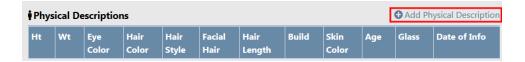
**5.** Click **Next Section** on the *Edit Field Arrest* screen to navigate to *Arrestee Information* tab, or click on the *Arrestee Information* tab.

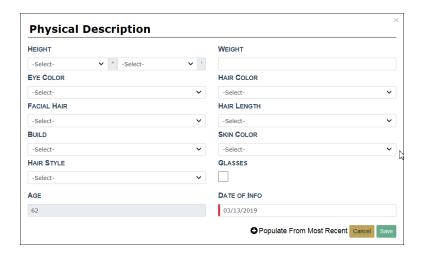
**Note**: Each tab has a **Next Section** link that advances you to the next tab. Or you may click on the individual tabs to navigate between tabs manually.



**6.** Click on the individual **Add** buttons to enter the necessary *Arrestee Information* in the various sections.

For example, click on **Add Physical Description** to add the Arrestee's physical description.





- a. If arresting a previously known person you can import the existing Physical
   Description from the Master Person record. Click on the Populate From Most

   Recent button to populate the data from the most recent Master Person record.
- b. Update fields as needed.
- c. Click **Save**, or click **Cancel** to return to *Edit Field Arrest* screen without adding a **Physical Description**.
- d. Continue adding all other necessary information.

**Note: Citizenship** under the **Birth Place** section is required. If **Country** is blank, it defaults to the same value as **Citizenship**. If needed, you can select a different Country than Citizenship.

**Note:** The **Email/Web Addresses** section supports social media sites, such as Facebook, Twitter, LinkedIn, Instagram, Snapchat, YouTube.

7. If you would like to add multiple addresses, you can click the Make Most Recent icon on an existing address to make a duplicate of that address, then make any necessary changes.



Note: Beginning with RMS11.10, location search is greatly enhanced. Begin typing the address and the system will return RMS locations. If your agency has Google Places turned on, you will also see Google addresses. Links will appear that allow you to add addresses and/or interact with a map for location identification.

8. Click Next Section on the Edit Field Arrest screen, or click on the Officers tab.

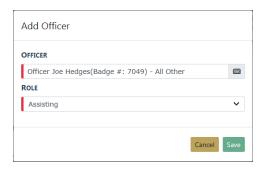
## Officer

Ensure the information is correct on the Officers tab.



The Field Arrest accommodates multiple officers with different roles.

1. Click the Add Officer link to add officers to the Field Arrest.

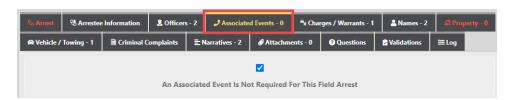


- 2. Choose the appropriate Officer and associated Role, then click Save.
- 3. The added officer then appears in the **Officer** tab of the Field Arrest record.

The **Add Non-Agency Officer** link appears for multi-tiered agencies. With the proper permissions assigned by your administrator, this button allows you to assign officers from outside of your agency. For more information see your administrator.

## **Associated Events**

This tab gives you the option to associate an **Incident** or **Calls for Service** to this **Field Arrest**. To waive the option, check the **An Associated Event Is Not Required For This Field Arrest** box.



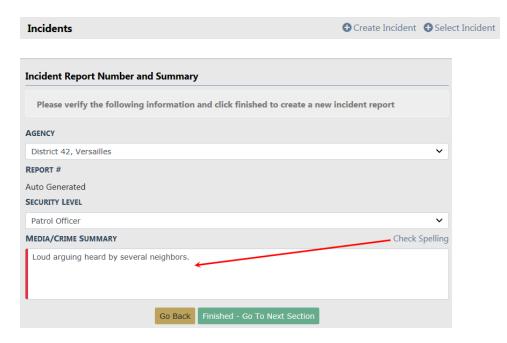
If you want to associate an **Incident** or **Calls for Service**, leave the box unchecked. You can either *create* or *select an existing* **Incident**, or *select an existing* **Call**.

Note: You may assign multiple Associated Events to the same Field Arrest.

### **Create Incident**

Create Incident only applies if your agency allows the manual creation of incidents.

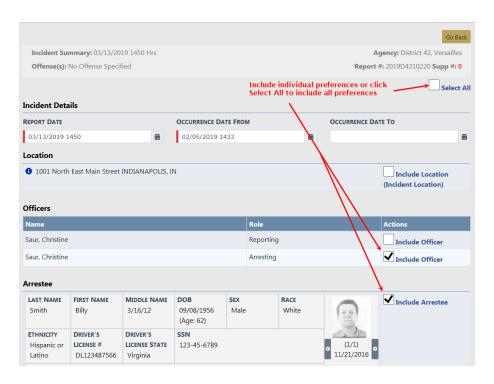
1. Select the **Create Incident** link to create an **Incident**. The *Incident Report Number* and Summary screen opens.



2. Enter the necessary information, then click the **Finished - Go To Next Section** button.

**Note**: Click the **Check Spelling** button to check your spelling before going to the next section if you wish.

3. The Incident Associations form opens.



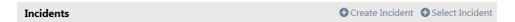
4. Select the items on the *Incident Associations* form to include on **Incident Report** from the **Field Arrest**.

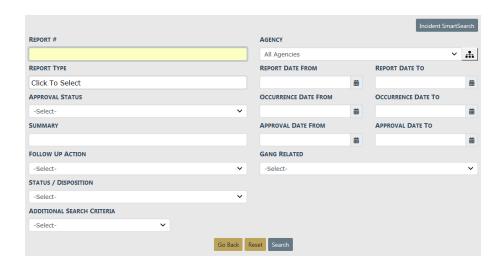
**Note**: Additional information can be added to the **Incident Report** later. For more information on **Incident Reports** refer to "Incidents" on page 185.

- 5. Click the **Save** button at the bottom of the screen.
- **6.** The associated **Incident** appears in the **Associated Events** tab of the *Edit Field Arrest* screen.

## Select Existing Incident

Select the Select Incident link to associate an existing Incident to the Field Arrest.
 The Incident Search screen opens.





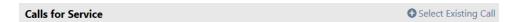
2. Enter the **Report#** if known, otherwise enter the known information, then click the **Search** button to view the results of your search.

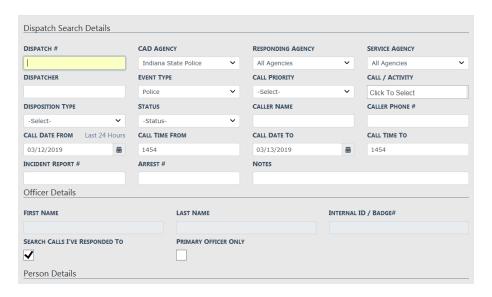


3. Click on the **Select** icon to select the appropriate **Incident Report**. The selected report will then appear on the **Associated Events** tab of the **Field Arrest** record.

# Select Existing Call

1. Select the **Select Existing Call** link to associate an existing **Calls for Service** to the **Field Arrest**. The *Calls For Service Search* screen opens.





- 2. Enter the Dispatch# if known, otherwise enter the known information.
- 3. Click the **Search** button to view the results of your search.



- 4. Click on the **Select** icon **t** to select the appropriate **Calls for Service**.
- 5. The selected CFS then appears on the **Associated Events** tab of the **Field Arrest** record.
- When you are finished adding the necessary associated events, click the Next Section button to advance to the Charges/Warrants tab.

# Validations on Field Arrest Imports

The **Field Arrest** can be associated to an **Incident Report**, and data from the **Field Arrest** can be imported into the **Incident Report**.

When associating a **Field Arrest** to an **Incident Report**, don't assume all of the **Field Arrest** information is automatically associated to the **Incident Report**, for this has led to improper UCR and NIBRS reporting.

If a **Field Arrest** is associated to a report, then Online RMS verifies that at least one offense from the associated **Field Arrest** was added to the **Incident Report**, if no offense was associated or added to the **Incident Report** then validation errors occur:

 Field arrest information – At least one offense from the field arrest must be included.

If a **Field Arrest** is associated to a report, then Online RMS verifies that Arrestee (person name) from the associated **Field Arrest** is added to the **Incident Report**, if no arrestee was associated or added to the **Incident Report** then validation errors occur:

• Field Arrest Information – Arrestee from field arrest must be included on report.

# **Charges and Warrants**

On this screen you have the option to **Add Charges**, **Add System Warrants**, and **Add External Warrants**.



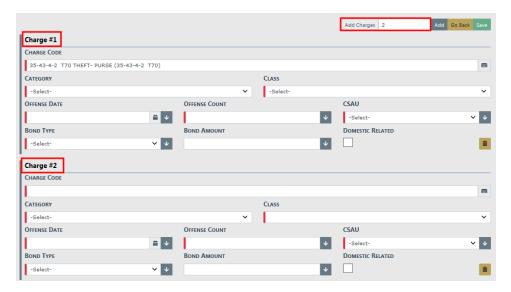
Note: If there is an active System Warrant a red link appears to the left of +Add System Warrant with the person's name. Click the red link for Warrant options.

- 1. Click the Add Charges link to add the Charge.
- 2. For the **Charge Code** type in a portion of the offense description then select from the drop-down.

Note: You must enter each charge separately.



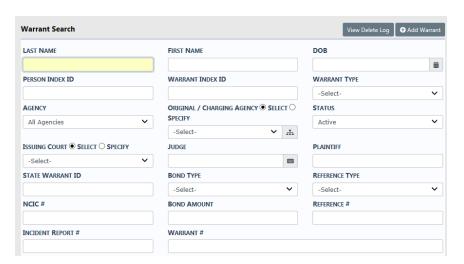
- 3. If the Charge is domestic related, check the **Domestic Related** box.
- 4. If a Charge is selected that has a default Bond Type or Amount configured for the Charge Category and Class related to the Charge Code or directly at the Charge Code level, the **Bond Amount** and **Type** automatically populates for you. You can update the Bond information as needed.
- 5. Click the Add button on the top right of the screen to add additional charges. Alternatively, you can enter the number of charges in the Add Charges text box to add a set of fields for that many charges.



- 6. Click the Save button to add the Charges to the Field Arrest.
- 7. Click the Add System Warrant and Add External Warrant links to add that information, if appropriate.



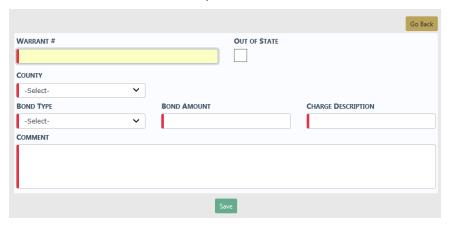
a. Click Add System Warrant to open Warrant Search.



b. **Search** for the existing Warrant, then select from the results list to add it to the Arrest.

If the Warrant does not exist, you can click on the **Add Warrant** button on the Warrant Search screen. For more information on searching or adding Warrants, refer to WARRANTS.htm.

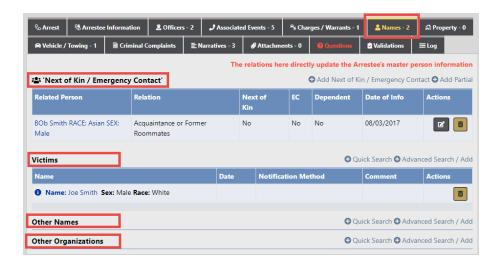
c. Click External Warrants to open the Add External Warrant form.



- d. Enter the appropriate information, then click **Save** to add it to the Arrest.
- **8.** Once you have completed all information, click the **Next Section** button to advance to the *Name*stab.

### **Names**

The Names tab contains Next of Kin/Emergency Contacts, Victims, Other Names, and Other Organizations.



#### Next of Kin/Emergency Contact

1. Click the Add Next of Kin/Emergency Contact link to open the *Master Person*Search screen to search for the name in the Master Person Index module.

◆ Add Next of Kin / Emergency Contact

2. Or, if when Arrestees do not provide sufficient information to create a master person record. Click the **Add Partial** link to provide minimal information, then search the master index with the entered data.



- a. If a matching master person index record <u>is not</u> found, you can save it to the arrest without creating a master person record.
- b. If a matching master person index record <u>is</u> found, select the record to add it to the arrest.

#### Victim, Other Names, Other Organizations

 Click the Quick Search link to search for the name or organization in the associated Master Indices module. If you do not find it in the Master Index, click the Advanced Search/Add link to add.



For more information on searching in and adding records to the Master Indices, refer to "Master Indices" on page 81.

Once you have completed all information, click the **Next Section** button to advance to the *Property* tab.

# **Property**

The **Property** tab is applicable only when *Field Arrest Property* is setup to be used from the *Field Arrest Module Admin* page.

Enter **Property** that needs to be inventoried and belonging to the Arrestee.

If there is no property to be inventoried, check the **Arrestee Property Not Inventoried** box.

If the arrestee has no property, check the **Arrestee Has No Property** box. This check-box is not available when there is property on the arrest.



If there is **Property** to be inventoried, follow the next steps:

1. Click the Add Personal Property link to open Property Details.



**Note**: The **Arrestee Property Not Inventoried** box must be unchecked for the **Add Personal Property** link to appear.

2. The Logging Officer defaults to the Arresting Officer. Make sure this information is accurate.



- 3. Using the Drop-downs and free text boxes, enter the appropriate description and any comments.
- 4. Click the Add Additional Property link to add additional property, if applicable
- 5. Click the Save button.
- 6. The **Property** appears in the grid and a **Print Selected Property Labels** link appears.



7. Select one or more property records, then click the Print Selected Property Labels.



8. A FieldArrest Property.pdf file downloads to your machine.

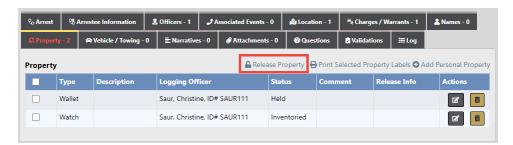
**Note:** If a **Release Property link** appears, you can click on the link to release property. For more information on releasing property, refer to "Release Property" on the facing page.



Once you have completed all information, click the Next Section button to advance to the Vehicle/Towing tab.

### **Release Property**

For your convenience, you can release property from the *Property* tab of the *Edit Field Arrest* page.



The link appears only if there is at least one property record that is eligible for release.

1. Click on the **Release Property** link to open the *Release Property* form listing the property that is eligible for release.



- 2. **Check** one or more property records you want to release. While one item appears in the example, there could be multiple.
- Enter Released To and Date Released.
- 4. Select a different Releasing Officer or leave as the default.
- 5. Optionally, click the **Signature** button to sign.
- 6. Click Save.
- 7. The release information appears on the property record.



Notice the **Release Property** link no longer appears. In this example, there are no longer existing property records that are eligible for release; if there were, the link would still be available.

# Vehicle/Towing



The **Vehicle** must exist in the *Master Index* module before you can associate it to an Arrestee. With the proper permissions, you can add it to the *Master Vehicle Index* if it doesn't exist. For more information about the *Master Index* module, refer to "Master Indices" on page 81.

### Associate a Vehicle

1. Associate a vehicle to the Arrestee one of three ways:

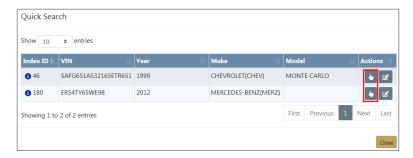
#### Select Vehicle Associated to Arrestee

**Note:** This option is available only when at least one vehicle is associated with the Arrestee.

Click the **Select Vehicle Associated to Arrestee** link, if available, to add a **Vehicle** associated with the Arrestee. This link appears only when at least one vehicle is linked to the person listed as the Arrestee.

• Select Vehicle Associated to Arrestee

Click the **Select** icon to select the vehicle you want to associate with the Arrestee.



Note: Only one vehicle can be associated with an Arrestee.

With appropriate permissions, you can click on the **Edit** icon Master Vehicle Index record, if necessary. For more information on updating a Master Vehicle Index record, refer to "Master Indices" on page 81.

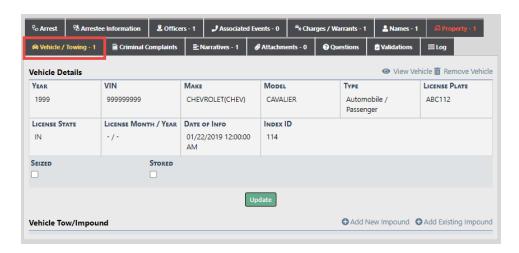
#### **Quick Search**

Click the **Quick Search** link to search for the **Vehicle** by *VIN*, *License Plate*, and *State*. If the **Vehicle** appears on the search results, click the Select icon to select it.

#### Advanced Search/Add

If the **Vehicle** is not in the *Master Vehicle Index*, click the **Advanced Search/Add** link to add the **Vehicle** to the *Master Vehicle Index*. For more information on searching and adding a *Master Vehicle Index* record, refer to "Master Indices" on page 81.

2. Once you select the **Vehicle**, it appears in the Vehicle/Towing tab of the Field Arrest.



You can click the **View Vehicle** link to view vehicle details or click the **Remove Vehicle** link to remove it from the Field Arrest.

- 3. Check the **Seized** box if the vehicle was seized.
- 4. Check the **Stored** box if the vehicle was stored.
- 5. Click the **Update** button to save your updates.

### Add Vehicle Tow/Impound

Vehicle Tow/Impound appears at the bottom of the screen.

- Click the Add New Impound link to add a new record, or click Add Existing Impound to select an existing Impound record, then enter the necessary information.
- 2. If a vehicle record already exists on the Field Arrest, a warning stating the existing vehicle and towing information may be overwritten. Click Yes to continue and overwrite the existing vehicle and towing information, or click No to exit without overwriting.



**Note**: When adding an existing Impound record, the vehicle associated with the Impound is added to the Arrest.

- 3. Click the **Update** button after all information is entered.
- **4.** Once you have completed all information, click the **Next Section** button to advance to *Oriminal Complaints* tab.

# **Criminal Complaints**

Click the Add Criminal Complaint link to add a criminal complaint, if applicable.
 This option appears providing you have the appropriate permissions and the feature is turned on.



Note: If you receive a **OBTN** required message, click **OK**, then navigate to the **OBTN** (Offender Based Tracking Number for criminal complaints) on the *Arrest* tab.



**Note:** The label **OBTN** could appear as **Arrest Tracking Number** for your agency. This label is configurable by agency.

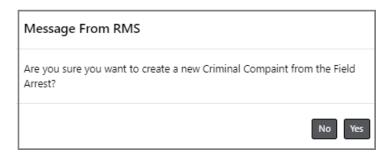


**Enter** or **Generate** the OBTN number, depending on how your administrator configured the OBTN number.

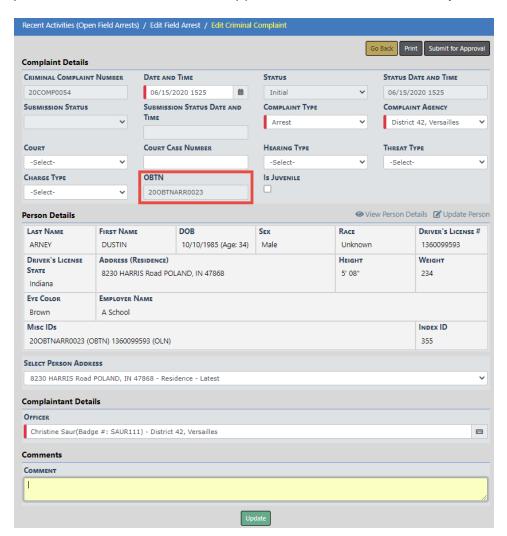
**Note:** The functionality of this field is configurable by agency. Your agency has the option to have users enter or generate the number.

Navigate to the *Criminal Complaints* tab and click **Add Criminal Complaint** after entering or generating the OBTN number.

2. A new *Criminal Complaint confirmation* box appears, asking if you are sure you want to create a new one.



3. Click **Yes** to create the Criminal Complaint record and open the *Edit Criminal Complaint* form. The OBTN number appears on the form as read-only.



**4.** The Arrestee, Arresting Officer, Location, and Offenses from the Field Arrest pulls into the Criminal Complaint form automatically as shown below.



5. Make the appropriate changes on the *Edit Oriminal Complaint* and click the **Update** button.

For more information on editing the Criminal Complaint, refer to "Edit a Criminal Complaint" on page 304.

- **6.** Optionally, click the **Print** button to print the Criminal Complaint.
- **7.** Optionally, click the **Submit for Approval** button to submit the Criminal Complaint for approval.

For more information on submitting for approval, refer to "Submit Criminal Complaint for Approval" on page 313

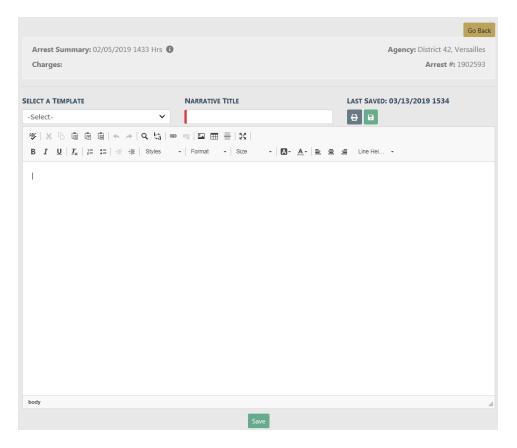
**Note:** When the Criminal Complaint is approved, the approval process creates a Court Case automatically, providing your agency has the Court Case module turned on. For more information on Court Case, refer to "Court Case Overview" on page 317.

8. Click **Next Section** to navigate to *Narratives* tab, or click on the *Narratives* tab.

# **Narrative**

The **Narrative** is not required to complete the **Field Arrest**. You can create one or multiple **Narratives**.

Click the Add Narrative link to open the Add Narrative screen. You must enter a
 Title and additional information in the body of the narrative.



2. You can use the formatting icons to customize the layout of your narrative. The built-in *Spelling and Grammar Checker* identifies mistakes and corrects them as you type.

**Note**: For more information on Narratives, refer to "Narrative Tab" on page 236.

**Note**: The Narrative auto-saves every 60 seconds while you type. The last saved date and time displays on the form.

3. To insert images, you must use the **Image** icon.



- 4. Click the Save button.
- 5. Click on the Print icon if you wish to print the Narrative. Refer to "Printing from Online RMS" on page 37 for details.

**6.** Once you have completed all information, click the **Next Section** button to advance to the *Attachments* tab.

### **Attachments**

**Attachments** are files that are accessed by other programs, such as a picture, document, spreadsheet, etc. These files are uploaded and saved to the **Field Arrest**. You can have none, one, or multiple **Attachments**.

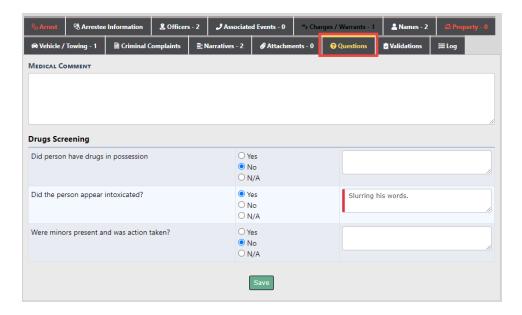


1. Click on the **Add Attachment** link to add attachments, or click **Image Library** to add image files from your personal *Image Library*. If images do not exist in your Image Library, then the hyperlink does not appear.

Refer to "Attachments" on page 67 or "Image Library" on page 73 for more information.

- 2. Click the Go Back button after uploading Attachments.
- 3. Once you have completed all information, click the **Next Section** button to advance to the *Questions* tab.

# Questions



- 1. Select and enter appropriate information in the fields provided.
- 2. A red left border in the **comments** fields indicates comments are required. The border may appear depending on the answer you provide to the left of the comment. In the below example, the comments field becomes required when you indicate the person appears intoxicated.
- 3. Click the Save button.
- **4.** Once you have completed all information, click the **Next Section** button to advance to the *Validations* tab.

# **Validations**

You must enter all required information before the system allows you to create the **Field Arrest** record. Tabs with missing required information display in red. Hover your mouse over the red tab to display a missing data message.



The **Validations** tab will also display the errors that are causing red tabs.



 Click on each red tab to enter the missing data. Repeat until there are no longer red tabs.

Note: If no errors, then there will be no red tabs.

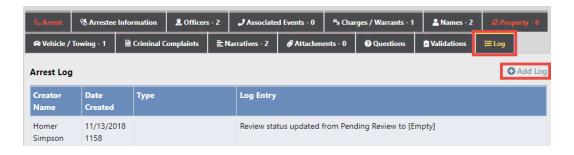
- 2. Click on the **Complete** button at the top of the screen.
- 3. Enter any comments and click the **Submit** button. An approval *Notification* is sent to the *Approval Group*.
- 4. The Field Arrest is now complete.

# Log

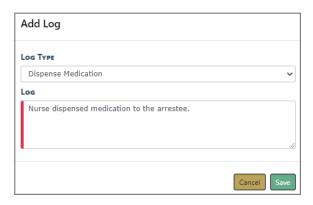
Activities affecting the **Field Arrest** are written systematically to the **Log** tab, creating a trail of events. For example, the system generates a **Log** entry when the **Field Arrest** is created, is updated, and another when it is submitted for approval. The **Log** entry includes the user name, date, and general description of the event.

To add your own Log entry:

1. Click on the Add Log button.



2. Select the Log Type and enter your Log comments.



3. Click Save to create and commit the entry to the Log.

Note: Log entries cannot be updated or deleted.

# **Duplicate Field Arrest**

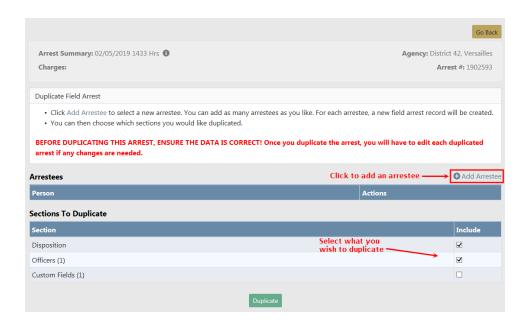
There are times when multiple arrests occur for the same location and charges. You must create a separate **Field Arrest** record for each Arrestee, and for your convenience, the **Duplicate** button at the top of the *Edit Field Arrest* form duplicates the **Field Arrest** record for each Arrestee systematically to avoid duplicate manual entry.

During the **Duplicate** process, you also select the **Field Arrest** areas to **Duplicate**, such as officers, narrative, charges, etc.

When adding a new **Field Arrest** the *Edit Field Arrest* screen appears automatically after selecting the Arrestee. For more information on adding **Field Arrests** refer to "Create Field Arrest Manually" on page 345.

To **Edit** an existing **Field Arrest** you must first **Search** for the **Field Arrest** you want to **Edit**, then select the appropriate **Field Arrest** to open the *Edit Field Arrest* screen. For more information on searching **Field Arrests** refer to "Search Field Arrests" on page 342.

- 1. When the *Edit Field Arrest* screen appears, click the **Duplicate** button on the top right to begin the duplication process.
- 2. The Duplicate Field Arrest screen appears.

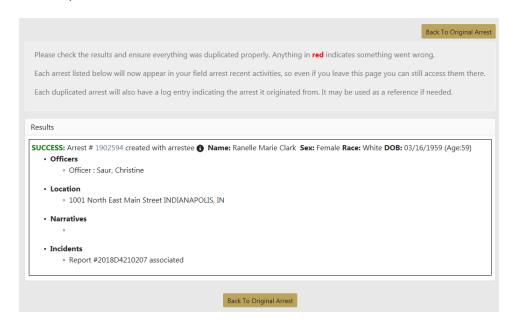


- 3. Adding all applicable Arrestees is the first step in the duplication process. Click the Add Arrestee link to open the Master Index Search screen.
- 4. Search and select the person to add it to the duplicate Field Arrest record. For more information on searching and selecting a person, refer to "Master Indices" on page 81.
- 5. Click the **Add Arrestee** link to add another Arrestee if needed. You may add as many Arrestees as necessary.
- **6.** After adding all the Arrestees, **select** the appropriate sections to duplicate. The list that appears in the *Sections to Duplicate* section vary based on the information that exists on the original **Field Arrest** record.
- 7. Click the **Duplicate** button to create a duplicate record for each Arrestee listed, or click **Go Back** at the top of the *Duplicate Field Arrest* screen to return to the *Edit Field Arrest* screen without duplicating.
- 8. If you chose to click the **Duplicate** button a confirmation message appears.



9. Click **Yes** to duplicate, or click **No** to return to the *Duplicate Field Arrest* screen without duplicating.

10. If you chose to duplicate, the *Duplicate Field Arrest Results* screen appears indicating success or failure. Read the Instructions at the top of the screen to understand how to interpret the results.



11. Click Back to Original Arrest to return to the original Field Arrest.

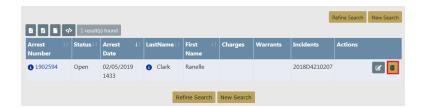
To view Field Arrests for the other Arrestees, you must **Search** for their Field Arrest records. For more information on searching Field Arrests refer to "Search Field Arrests" on page 342.

You may edit the individual Field Arrest records. For information on editing Field Arrest records refer to "Edit Field Arrest" on page 353.

# **Delete Field Arrest**

To **Delete** an existing **Field Arrest** you must first **Search** for the **Field Arrest** you want to **Delete**. For more information on searching **Field Arrests** refer to "Search Field Arrests" on page 342.

1. In the Search Results window locate the appropriate Field Arrest record then click on the **Delete** icon under the *Actions* column. If the **Delete** icon does not appear on that record then you do not have delete permissions. See your administrator for more information on permissions.



2. A confirmation box appears after you click on the **Delete** icon.

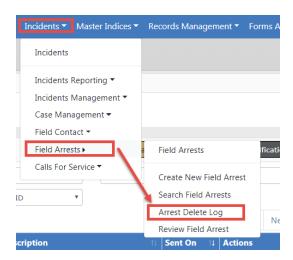


- 3. Click **Yes** to confirm or **No** to return to the *Search Results* without deleting. If you choose to delete the arrest, any associated incidents become unassociated.
- 4. If you clicked **Yes**, you must then enter the reason for the delete, then click the **Delete** button. Or click **Cancel** to abort the delete process.

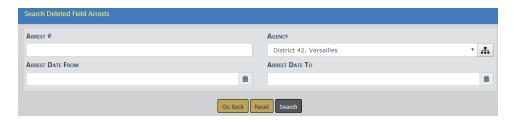


# **View Arrest Delete Log**

The deleted **Field Arrest** is logged automatically for tracking purposes. To view the log entry, select the *Incidents* menu, *Field Arrests*, then *Arrest Delete Log*.



1. The Search Arrest Delete Log screen appears.



- 2. Search for the log entry by entering a date range or Arrest Number if you know it, or leave all fields blank to view all log entries, then click the **Search** button to return a list of all log entries that match your search criteria.
- 3. You can export the search results to various file types, view the comments that were entered at the time the arrest record was deleted, and view the deleted log entry.

**Note**: For more information on exporting the results refer to "Export Search Results" on page 35.



#### Comments



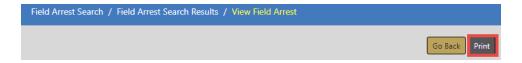
#### **View Arrest Log Record**



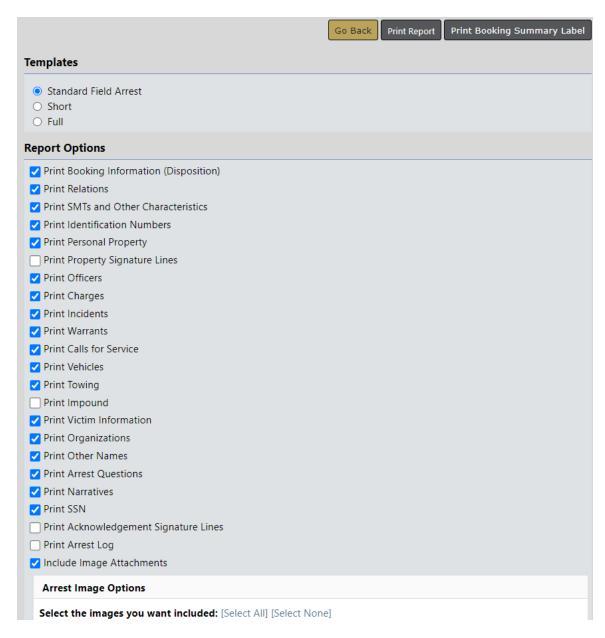
## **Print Field Arrest**

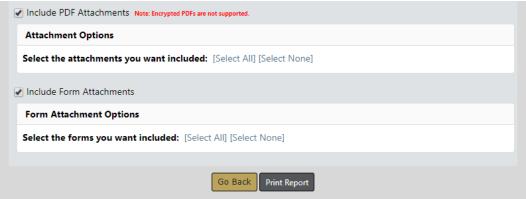
You can **Print** an existing Field Arrest from either the *View Field Arrest* or *Edit Field Arrest* page.

1. From either page, click on the **Print** button.

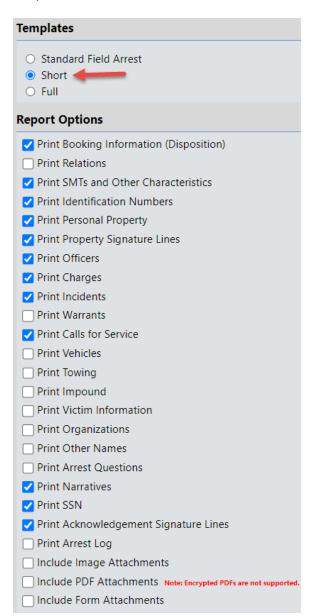


2. The **Print Options** page opens, with the default settings selected automatically.





- 3. Select the **Template** you wish to use. The template preselects report options for you.
  - Standard Field Arrest
    - Selected by default.
    - All print options are available, and all, except for the *Print Acknowledgment Signature Lines*, are preselected as shown in step 2.
  - Short
    - A shortened set of print options are available, and fewer print options are preselected.



- Full
  - All print options are available, as shown in step 2, except all are preselected, including *Print Acknowledgment Signature Lines*.

**Note:** Whichever template you choose, you can still elect to select or deselect print options.

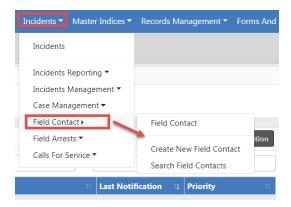
- 4. Select or deselect any **Report Options**, if needed.
- 5. Select Arrest Image Options, if applicable, by clicking Select All to include all existing arrest images on the report, or click Select None to exclude all arrest images.
- 6. Select the PDF Attachments you want to include or exclude, if applicable, by clicking Select All to include all existing PDF attachments on the report, or click Select None to exclude all.
- Select the Form Attachments you want to include or exclude, if applicable, by clicking Select All to include all existing form attachments on the report, or click Select None to exclude all.
- 8. Click on the **Print Report** button to open a PDF as a new tab in your browser. If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.
- 9. Optionally select the Print Booking Summary Label button to open a PDF as a new tab in your browser. If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.

The PDF includes a barcode, arresting officer, arrestee information such as, SSN, address, DOB, offenses, and physical description.

# **Chapter 19. Field Contacts**

### Overview

A **Field Contact** gives you the ability to document a situation such as an encounter with a suspicious person. The situation is such that it does not warrant an *Incident Report* but you still want to document it in the event something comes of it. That way it is searchable and you see the **Field Contact** associations within the *Master Indices* section. **Field Contacts** are located in the *Incidents* menu where you can search existing or create new **Field Contacts**.



When completing a **Field Contact**, you are able to document:

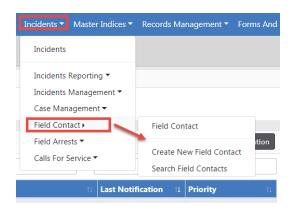
- Notes
- Location
- People
- Officers
- Vehicles
- Gangs
- Organizations
- Attachments
- Associate existing Incidents from within the Field Contact.

- Create Incidents from within the Field Contact.
- Associate existing Calls from within the Field Contact.

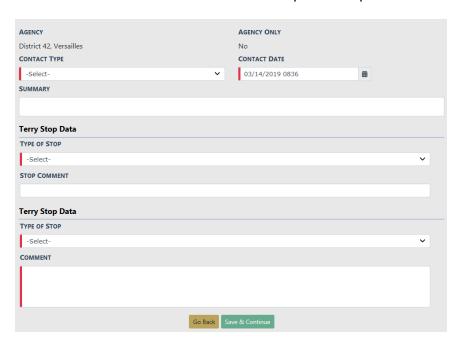
An *Incident Report* can also be generated from the **Field Contact**, similar to the **Field Arrest**. Once the **Associate Incident** link is selected, you will be able to select what information should be transferred to the *Incident Report*.

### Add a Field Contact

Field Contacts are located under the Incidents menu.



Click Create New Field Contact menu option to open the Add Field Contact form.



Enter the necessary data.

Click Save & Continue to open the Edit Field Contact form.

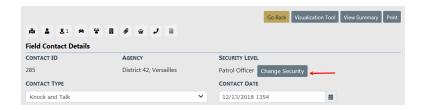
Enter the applicable sections of the **Edit Field Contact** form, then click the **Save** button:

- Field Contact Details
- Stop Data
- Location
- People
- Officers
- Vehicles
- Gangs
- Organizations
- Attachments
- Add (associate) existing Incidents from within the Field Contact.
- Create Incidents from within the Field Contact.

**Note**: Once the **Associate Incident** link is selected, you will be able to select what information should be transferred to the *Incident Report*.

Add (associate) existing Calls from within the Field Contact. If the selected Incident is
associated with a Calls For Service, a dialog box with the information appears, giving
you the option to associate the Calls For Service to the Field Contact.

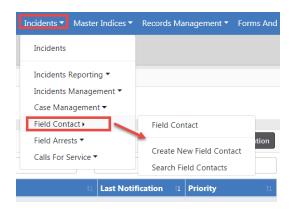
Once the **Field Contact** is completed, you can increase the **Security Level** if necessary.



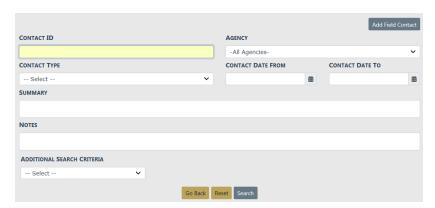
**Note:** For more information on the **Edit Field Contact** form, refer to "Edit a Field Contact" on page 396.

## Search for a Field Contact

**Field Contacts** are located in the *Incidents* menu where you can search existing or create new **Field Contacts**.



1. Select Search Field Contacts from the menu to open the Search Field Contacts form.



2. Enter the necessary data that assists with finding the Field Contact record.

The **Additional Search Criteria** allows you to include information from a specific section, if needed. Additional search fields will appear if you choose one of the available options from the list.



Vehicle example:



#### Custom Fields example:



**NOTE:** *Qustom Fields* is available for agencies that have the *Qustom Fields* feature enabled. *Qustom Fields* captures data defined by the agency. For more information refer to your administrator.

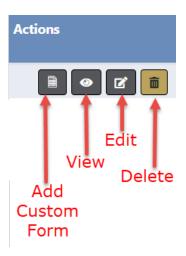
3. Click the **Search** button to view the **Search** Results.



From the Search Results window, you have the ability to export the search results to a file using the icons below the Search Results tab. For more information refer to "Export Search Results" on page 35.



- 4. If you want to make changes to your current search or start a new search, click the **Refine Search** button or the **New Search** button, respectively.
- 5. The icons under the *Actions* column of the *Search Results* allow you to *Edit*, *View*, or *Delete* a **Field Contact**, if you have the proper permissions. If an icon does not display, then you do not have access to perform that function.



For more information refer to "Edit a Field Contact" below, "View a Field Contact" on page 398, or "Delete a Field Contact" on page 403.

### **Edit a Field Contact**

To edit a **Field Contact** you must first **Search** for the **Field Contact**, then select the *Edit* icon in the **Search Results** window. For more information on searching refer to "Search for a Field Contact" on page 394.

 Select the Edit icon on the Field Contact record in the Search window to open the Edit Field Contact page.



There are several sections that make up the **Edit Field Contact** page. Each available section is listed across the top as icons. Click on any icon to go directly to the corresponding section, or scroll down the page to each section. The number that appears on the icon indicates the number of records associated with that icon. For example, the number 1 on the Officer icon indicates there is one officer record, and no number indicates there isn't a record associated with that icon.



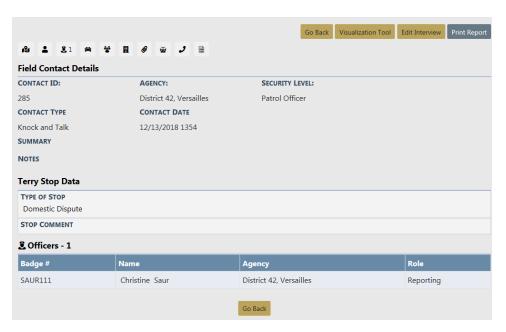


Note: Field Contacts can associate with a Calls for Service (CFS) event while in Edit mode. Click on the Calls for Service Go To link or page down to the Calls for Service grid to add an associated CFS to a Field Contact record. If the CFS has associated incidents, a pop-up window appears to select incidents that should also be related to the Field Contact.

- Click the **Print** button to print the **Field Contact**. For more information refer to "Print Field Contacts" on page 403.
- Click the Visualization Tool button to view display connections between people, addresses, involvements, etc., in a graphical format. For more information refer to "Crime Visualization Tool" on page 153.

**Note**: This button is based on user permissions and is not visible to all users. For more information contact your administrator.

Click the View Summary button to view a summary of the Field Contact.

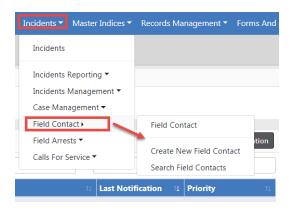


Click **Go Back** to return to the *Search Results*, or click **Edit Interview** to return to the **Edit Field Contact** page.

Complete all applicable sections and click the Save button after each section. For detailed instructions refer to "Enter or Update Field Contact Details" on the facing page.

# **View a Field Contact**

**Field Contacts** are located in the *Incidents* menu where you can search existing or create new **Field Contacts**. To view a Field Contact you must first search for the record.



Click **Search Field Contact** menu option to open the search form and enter the criteria to find and view the appropriate **Field Contact**. For more information on searching, refer to "Search for a Field Contact" on page 394.

## **Enter or Update Field Contact Details**

Whether you are creating a new **Field Contact** record or updating one that already exists, the process of entering the details is fundamentally the same.

**Field Contacts** data is grouped into various sections: field contact details, notes, locations, people, vehicles, gangs, etc.

The **Field Contacts** module utilizes *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, gang, vehicle, and organization.

**Note**: For more information on *Master Indices* refer to "Master Indices" on page 81.

Sections containing **Quick Search** and **Advanced Search** links utilize the *Master Index*. Caliber strongly recommends that you first search the *Master Index* to determine whether or not this data already exists before adding or updating. If the record exists, you must use it in the **Field Contact**. If the record doesn't exist, then you can create it, providing you have the proper permissions. For more information on permissions see your administrator.

Click the Save button to save the entered data.

## Location, People, Vehicles, Gangs, Organizations

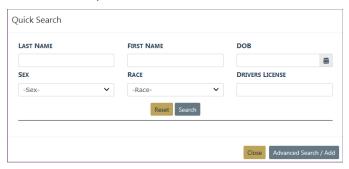


There are two types of searches:

#### Quick Search

 Limited Master Index search. For example, for person you can only search by last name, first name, DOB, sex, race, and driver's license number.

#### Person Example



#### Vehicle Example

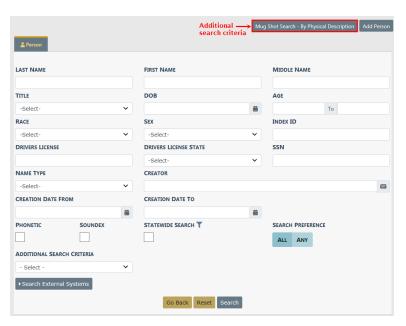


#### **Advanced Search**

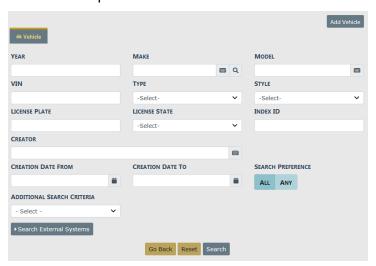
To perform an advanced search, click on the **Advanced Search/Add** button at the bottom right of the Quick Search window.

- Extensive Master Index search. For example, in addition to the Quick Search criteria for person, you can also search by age, middle name, physical features, age range, and more.
- This feature also allows you to add new Master Index records if they don't already exist, providing you have the proper permissions. See your administrator for more information.

Person Example



#### Vehicle Example



#### **Officers**

Click +Add Officer to open Quick Search and select additional officers.

#### **Attachments**

Click **+Add Attachment** to attach files or images. For instructions, refer to "Add Attachments" on page 67.

Click +View External Attachments, if applicable.

#### **Incidents**

Click **+Add Incident** to search for and select an existing Incident to associate with the Field Contact record.

Click **+Create Incident** to create a new incident and associate it to the Field Contact record.

- When prompted, click **Yes** to continue or **No** to cancel.
- If chose Yes to continue, the Oreate New Incident Report wizard steps you through the incident creation process. For more information on creating an incident report, refer to "Create Incident Report" on page 195.

#### Calls for Service

Click **+Add Call** to search for and select an existing calls for service record to associate with the Field Contact record.

#### Attached Forms

If applicable to your agency, you can attach a custom form.

Select an item from the **Add Form** drop-down list to open the chosen form. Complete the necessary fields, then click **Save** to remain on the form, or **Save And Exit** to save the form and return to the Field Contact form. Or click **Cancel** to return to *Edit Field Contact* form without adding a custom form.

## **Delete a Field Contact**

On rare occasions you may need to delete a **Field Contact** record, if you have proper permissions to do so.

Note: Field Contacts can be deleted only by the creator.

- 1. Search for the **Field Contact** record you want to delete. For more information on searching refer to "Search for a Field Contact" on page 394.
- 2. The **Field Contact** record you want to delete should appear in the Search Results window.



The **Delete** Icon in the *Actions* column allows you to **Delete** the record listed. If the delete icon does not display, then it is likely you do not have permissions to delete it. For more information on permissions, refer to your administrator.

- 3. Click the **Delete** Icon on the record you want to delete.
- 4. Enter Delete Comment then click Delete.



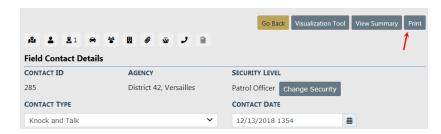
## **Print Field Contacts**

You can print a Field Contact you are viewing or editing.

For more information on editing a Field Contact refer to "Edit a Field Contact" on page 396.

For more information on viewing a Field Contact refer to "View a Field Contact" on page 398.

1. Click the **Print** button while viewing or editing the **Field Contact**.



- 2. Select the **Print Options** you would like to include, such as images, PDF, or Form attachments.
- 3. Select Print.

A PDF document opens in a new tab in your browser. Print directly to the printer or save the PDF document giving it a custom filename.

**Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.

# **Chapter 20.Incident Mapping**

## **Access Incident Mapping**

To access **Incident Mapping**, click on the **Incidents Reporting** drop-down menu on the top *Navigation Bar*, then click on **Incident Mapping**.



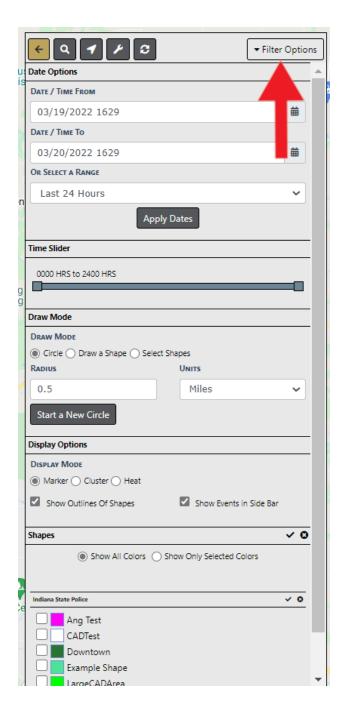
## Screen Layout

**Incident Mapping** contains two windows that overlay the map:

- Filter Options
- Current Query

The *Current Query* displays search results based on the defined *Filter Options*.

#### Filter Options Window



- Filter Options Clicking this button hides the Filter Options window.
- Date Options Select a start date and time and an end date and time. You may also select a date range from the drop-down list, such as Last 24 Hours, Week to Date, Last Week, Month to Date, etc. There is also a Time Sider if you want to select just a specific Time range. Click the Apply Dates button.

- Draw Mode This allows you to select a Circle Radius, Draw a Shape, or Select Shapes.
   If you select the Circle option, you need to select Radius and Units. The Radius and Units defaults to 0.5 Miles.
- Display Options These are options on how the search results display.
- Shapes are the Areas to which you want search results to be returned. Check the box next to the applicable areas then click the **Apply Selected Shapes** button when it appears. The **Apply Selected Shapes** button does not display until at least one area box is checked.
- Search Address To search for a specific address, select the magnifying glass icon on the top of the window to open the search window.

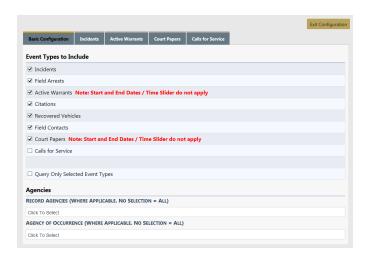


Enter the street address then select the **Search** button or press **Enter** to display a list of matching addresses. Click on the [Draw Circle At Center] link if you want to draw a circle on the map around a specific address from the list.



• Configure - To configure what and how event types Incidents, Active Warrants, Court Papers, and Calls for Service are displayed on the map, select the **Configure** icon

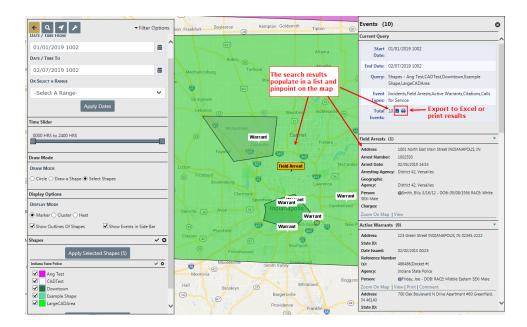
Your search results reflect what you select in the Basic Configuration tab.



After making your selections on each tab, click the **Exit Configuration** button to return to the previous screen.

- Exit Incident Mappings window. To exit the Incident Mappings window and return to your Home Page, select the **Go Back** icon —.
- Center Map To center the Map on the screen, select the Center Map icon .
- Refresh Select the refresh icon on to reset the map and query settings.
- *Hide or Unhide Filter Window* To hide or unhide the Filter Window, select the **Filter Options** button.

#### **Query Window**

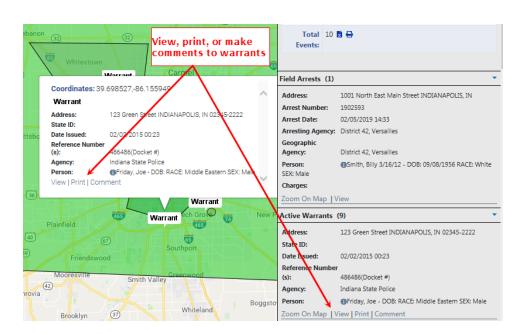


From the *Current Query* section of the **Query Window** you have the ability to print or export the search results to an Excel document.

Click the **Zoom On Map** link to zoom to a specific event on the map.



Anyone with permissions to view warrant locations on the **Incident Map** can also view, print and comment directly from the map to the Warrant. You must enter a Log Date and Time, Action Type and Comment. This will be added to the Warrant Log.

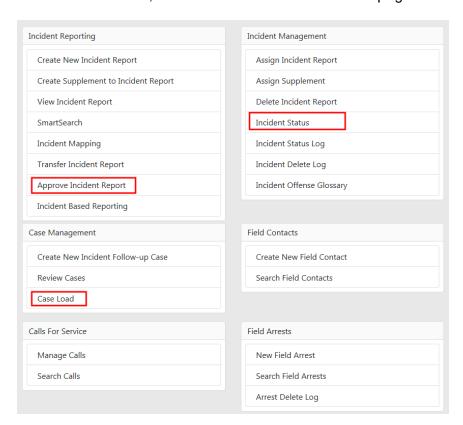


Click the **Save** button to commit the comment to the log, or click **Cancel** to abort the log entry and return to the map.

# Chapter 21. Supervisory Functions

## **Supervisory Function Overview**

Users with *Supervisor* rights have more options than the regular user. Most of these added functions will be seen in the Incidents menu. For more information on accessing the Incidents menu, refer to "Incidents Overview" on page 185.



## **Approve/Disapprove Incident Report**

You can initiate the approval process one of three ways:

- Click on *Pending Approval* in **Recent Activities** section, located on the right side of the home page.
- Directly from the Notification when Incident Reports are submitted for approval.

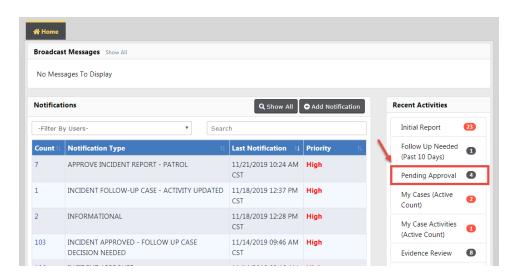
• Directly from the Incident.

**Note:** You can *disapprove* or change the status back to *Initial Status* on approved incidents by way of the Incident Status form. For more information, refer to "Changing Incident Status" on page 273.

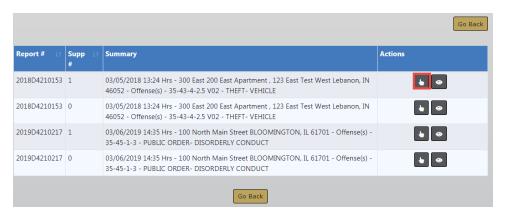
Note: If your agency configures Review Routing, a Secondary Review Route may initiate additional review opportunities after an incident is approved. With Online RMS 11.6 and above, the reviewer may also include Disapproval Comments during Secondary Review.

#### Initiate from Recent Activities

Initiate the incident approval process by clicking on *Pending Approval* under Recent Activities.



Click on the select icon 5 to select the appropriate incident from the list.





#### Click the Approve/Disapprove button to open the Incident Report.

The Incident Report opens. Continue with the approval/disapprove process. For more information, refer to "Approval/Disapprove Process" on page 415.

#### Initiate from Notifications

Users with a supervisory role for their agency will receive notifications when Incident Reports are submitted for approval. A supervisor can initiate the approval process directly from the notification.

For more information about accessing notifications, refer to "Notifications" on page 23.

Click on the appropriate notification to initiate the approval process.



#### Click on the Take Action button.

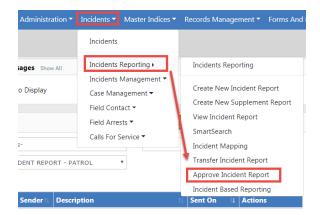


The Incident Report opens. Continue with the approval/disapprove process. For more information, refer to "Approval/Disapprove Process" on the facing page.

#### Initiate from the Incident

Users with a supervisory role can also initiate approval directly from the Incident.

Click Incidents on the top navigation bar, click on Incidents Reporting, then click on Approve Incident Report.



The Incident Search - Approve Incident Report screen appears.



Enter the search criteria, click on the **Search** button to display the search results, then click the **select icon** to begin the approval process.



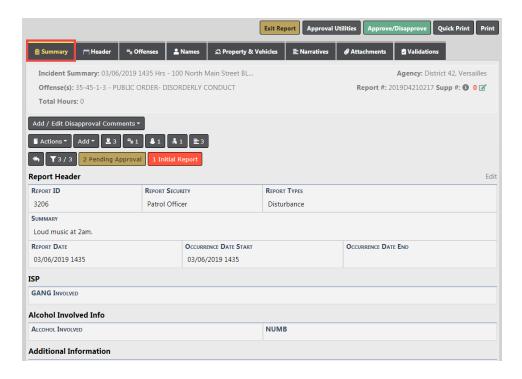
Click the Approve/Disapprove button to open the Incident Report.



The Incident Report opens. Continue with the approval/disapprove process. For more information, refer to "Approval/Disapprove Process" below.

#### Approval/Disapprove Process

After choosing a method to initiate the approval process, the *Incident Approval* screen appears, defaulting on the Summary tab.



You can perform various functions, such as check for warnings, search for offense or NIBRS codes, add disapproval comments if applicable, and review the incident report. Supervisors can also edit the incident report providing the agency is setup to allow this function.

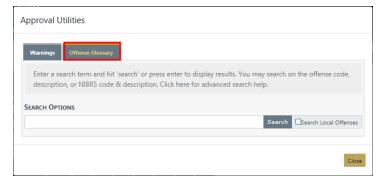
**Note:** If your agency configures *Review Routing*, a *Secondary Review Route* may initiate additional review opportunities after an incident is approved. With Online RMS 11.6 and above, the reviewer may also include Disapproval Comments during *Secondary Review*.

#### **Approval Utilities**

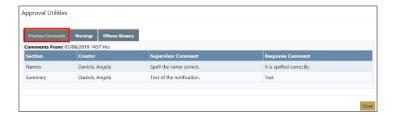
Optionally, click on the **Approval Utilities** button on the top right of the page to view *Warnings* and search for offense or NIBRS codes using the *Offense Glossary*.







A *Previous Comments* tab appears if the incident report is disapproved at least once. This tab contains comments that are made during the disapproval process.



#### **Disapproval Comments**

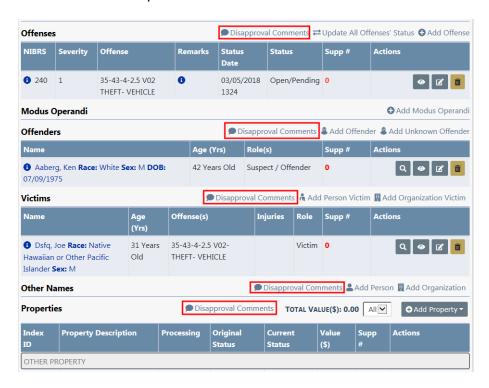
If applicable, you can add disapproval comments to various sections of the incident report two ways.

 Click the Add/Edit Disapproval Comments, then select an option from the list to incorporate disapproval comments to various sections. Add your comments then click Save.



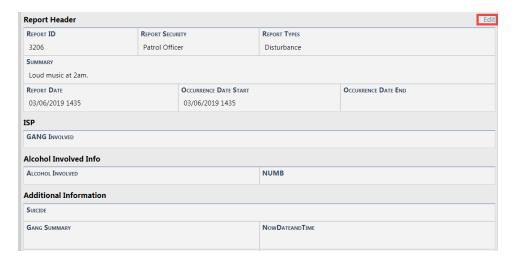


 Or, you can page down and add **Disapproval Comments** to various sections like shown in the example below.



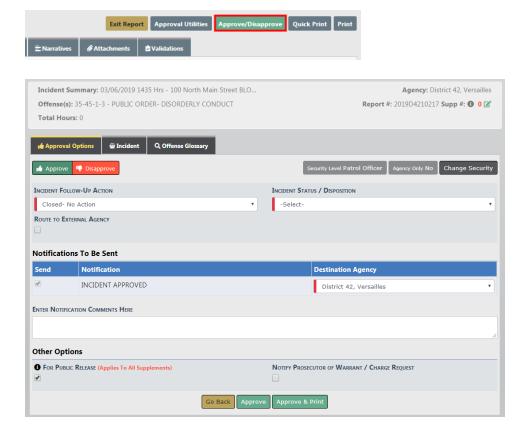
#### Edit the Incident Report

The agency setup dictates whether or not supervisors can edit the incident report during the review process. If supervisors have been granted edit privileges, an **Edit** link appears on the top right of applicable sections.



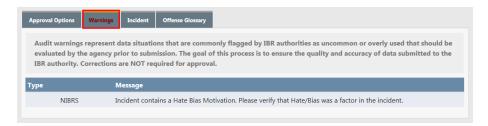
#### **Finalize the Approval Process**

Click on the green **Approve/Disapprove** button on the top right of the incident report to open the *Approve Incident Report*.



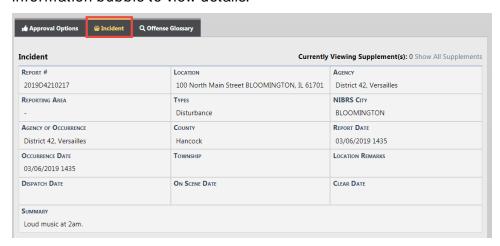
There are four tabs on the Approve Incident Report screen:

- Approval Options
  - Contains the necessary options to either Approve or Disapprove. The Approve Incident Report screen defaults to this tab.
- Warnings (if applicable)
  - Contains Incident Report validation warnings.



- Incident
  - Incident Report in view only mode.

The Offenses section includes details for the related NIBRS Offense code, NIBRS Offense Title, and offense description. Hover the mouse over the blue information bubble to view a summary of this information, or click on the blue information bubble to view details.



- Offense Glossary
  - Contains a feature to lookup offenses to confirm accuracy of the offense selected for the Incident Report. Enter the search criteria in the search field provided, then press Enter or click Search to display a list of NIBRS Codes that contain the entered text.



#### **Approval Options**

Depending on your agency's business practice, supervisors may have various options when approving a report:

- Restricting reports to the internal Agency Only. The Route to External Agency button is gray when the report is restricted to the internal agency, and green when selected to route to external agencies.
- Click on the Change Security button allowing for greater internal security among the users within an agency.
- Choose the Follow-up Action.
- Choose the Status/Disposition.
  - Your agency administrator has the ability to map *Incident Status* codes to *Offense Status* codes to prevent mismatches. During the approval process, if you set an *Incident Status* to something other than what has been mapped to an *Offense Status*, a message appears disallowing that selection and it prompts you to verify the information and make any necessary changes. Refer to your agency administrator for more information.

**Note:** The Follow-up/Action option you choose drives what Incident Status/Dispositions are available for selection.

The different options available will depend on the workflow selected for **Case Management** by your agency. The *Notifications to Be Sent* section generates a notification to request a follow-up Case determination in an optional workflow. For more information refer to "Case Management" on page 439.

Make other necessary updates.

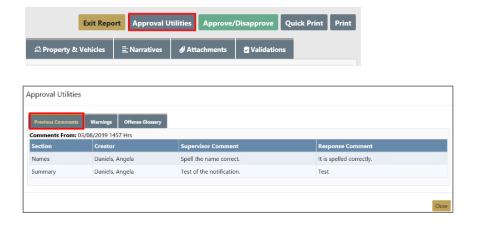
Click the **Approve** button to finalize the approval, or click the **Approve and Print** button to finalize the approval and print.

#### Disapprove

When **Disapprove** is selected, a comments box displays so the supervisor can advise the user of the reason for the disapproval. Enter comments then click the **Submit** button.



The disapproval comments now appear in the *Previous Comments* tab in Approval Utilities.



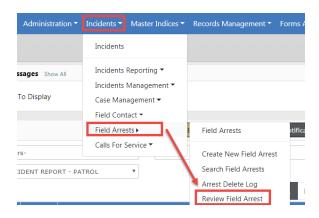
## **Approve or Disapprove Field Arrests**

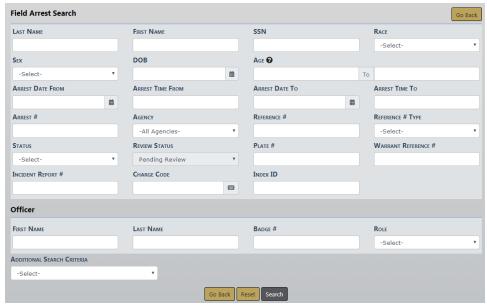
As an Officer Supervisor for your agency, you receive notifications when officers submit **Field Arrests** for approval. You can initiate the approval process one of three ways:

- Click on the new Notification link to view the Notification, then click the Take Action button to open the Review Field Arrest form. For more information on Notifications refer to "Notifications" on page 23.
- Directly from the notification by clicking on the select icon under the Actions column.



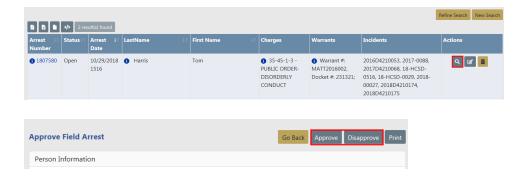
 Or select the Review Field Arrest link from the Incidents menu, then search for Field Arrest record.





Search for the **Field Arrest** record by entering the information you know about the arrest, then click the **Search** button to display a list of Arrests from which to choose.

• Click the **Review** icon to *Approve* or *Disapprove* the **Field Arrest** record.



#### **Approve**

Click the **Approve** button on the **Approve Field Arrest** screen, then click **Yes** in the confirmation window to approve.



#### Disapprove

Click the **Disapprove** button on the **Approve Field Arrest** screen, then enter **Comments** and click **Save**.



The creator of the **Field Arrest** will receive a **Disapproved** notification.

## **Approve or Disapprove Criminal Complaint**

#### Approval Levels

The agency has the option to utilize a 1 or 2 level approval:

#### 1-Level Approval Process

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.

#### 2-Level Approval Process

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.

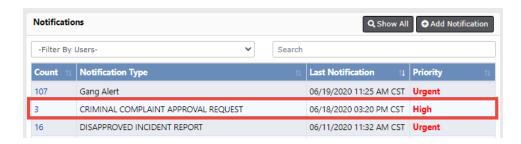
The court officer submits the approved complaint data to the court.

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.

For more information on **Maint Value** settings, refer to the Maintenance Values chapter of the *Caliber Online RMS Administrator Guide*.

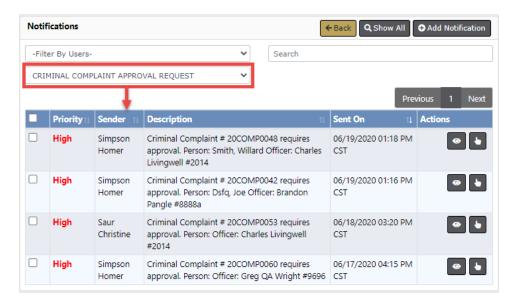
#### Approve the Complaint

If you have permissions to approve Criminal Complaints, you receive *Criminal Complaint Approval Request* notifications when users submit Criminal Complaints for approval.

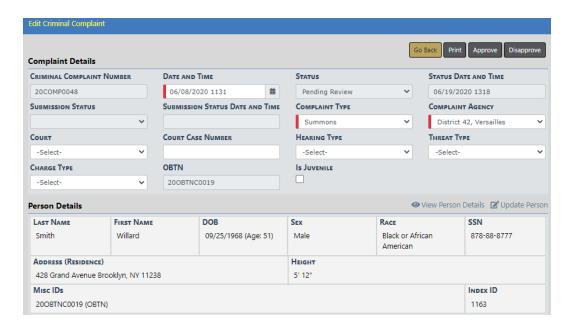


For more information on Notifications refer to "Notifications" on page 23.

1. Click on the **Count** in the first column of the notification to view all *Criminal Complaint Approval Requests*.



- 2. Click the **Select icon** on the Criminal Complaint record you want to review.
- 3. The Edit Criminal Complaint form opens.



The approval action buttons that appear on the top right of the screen vary based on your permissions, the approval level defined by your agency, and the complaint status.

You may see one or more of the following: **Approve**, **Approve & Submit**, **Submit**, **Disapprove**. Refer to the next step for details.

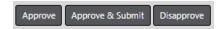
- 4. Review the complaint then finalize the approval by following the appropriate approval level defined by your agency:
  - 1-Level Approval Process
  - 2-Level Approval Process

For more information on approval levels, refer to "Approval Levels" on page 425.

For more information on updating the Criminal Complaint, refer to "Edit a Criminal Complaint" on page 304.

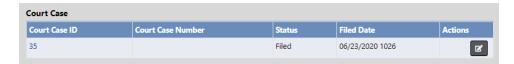
#### 1-Level Approval Process

1. The officer supervisor performs one of the following actions:



Approve - Approve the complaint.

- A brief green Success message appears across the top of the screen when the approval is successful. If it is not successful, a red Failed message appears across the top.
- Upon success, a Submit button replaces Approve & Submit, allowing you to submit to the court as a separate step later.
- Upon success, the approval process changes the Criminal Complaint status to *Approved*, and the **Approve** button no longer appears.
- If the Court Case feature is turned on for your agency and the approval is successful, the process generates a Court Case record and displays it on the complaint.



**Note:** The officer manually enters the **Court Case Number** after the Criminal Complaint is submitted and accepted by the court. The court provides the **Court Case Number**.

- Approve & Submit Approve the complaint and submit the data to the court as a single action. For more information on Submit, refer to "Submit to Court" on the facing page
- **Disapprove** Disapprove the complaint. For disapprove instructions, refer to #disapprove.

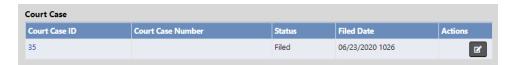
#### **2-Level Approval Process**

1. The officer supervisor receives notification to approve or disapprove the complaint.



- Approve Approve the complaint.
  - A brief green Success message appears across the top of the screen when the approval is successful. If it is not successful, a red Failed message appears across the top.
  - Upon success, the approval process changes the Criminal Complaint status to *Approved*, and the **Approve** button no longer appears.

 If the Court Case feature is turned on for your agency and the approval is successful, the process generates a Court Case record and displays it on the complaint.



**Note:** The officer manually enters the **Court Case Number** after the Criminal Complaint is submitted and accepted by the court. The court provides the **Court Case Number**.

- **Disapprove** Disapprove the complaint. For disapprove instructions, refer to #disapprove.
- 2. If approved by the officer supervisor, the court officer receives notification to submit the data to court. The court officer also has the option to disapprove the approved complaint.



- **Submit** Submit the complaint data to the court. Refer to "Submit to Court" below.
- **Disapprove** Disapprove the approved complaint. For disapprove instructions, refer to #disapprove.

#### Submit to Court

The behavior varies slightly, depending on whether your agency is utilizing **1-Level Approval Process** versus **2-Level Approval Process**.

If your agency is utilizing 1-Level Approval Process:

- 1. Click the **Submit** button or **Approve & Submit** button on the complaint, whichever applies to your agency.
  - If submission is **successful**, a brief message appears across the top of your screen in green and the *Submission Status* on the Criminal Complaint changes to *Submitted* automatically.
  - If submission is unsuccessful, the Submission Status on the Criminal Complaint changes to Submission Error automatically. Review and update the Criminal Complaint as needed, then resubmit.

If your agency is utilizing 2-Level Approval Process:

- 1. The court officer receives notification to submit the complaint data to the court.
- 2. Click Submit on the complaint.

For more information on the different approval levels, refer to "Approval Levels" on page 425.

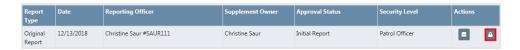
#### Disapprove

- 1. Click the **Disapprove** button on the *Edit Oriminal Complaint* screen, then enter **Comments** and click **Save**.
- 2. The creator of the Criminal Complaint receives a **Disapproved** notification. The user has the option to take action, including resubmitting for approval.

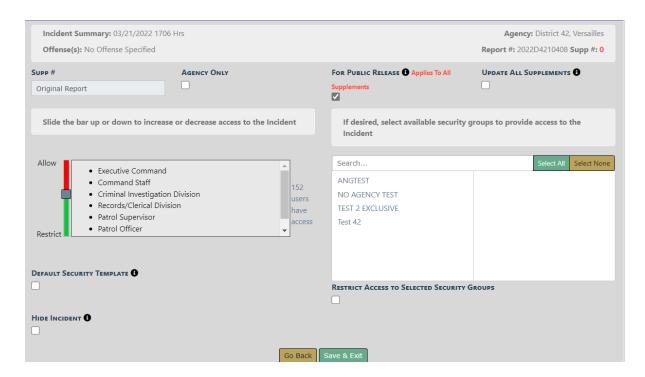
For more information on users taking action, refer to "Take Action on Disapproved Notifications" on page 315.

## Incident Security

The default security for **Incident Reports** is set at the Patrol Officer level. This means anyone with Patrol Officer Security rights and above can access these reports. It is understood that some **Incident Reports** will be of a more sensitive nature and may require a higher security level to minimize the number of users that have access to the report. The security of an **Incident Report** can be done by clicking on **Change Security** from the **Incident Approve/Disapprove** screen.



The **Incident Security** screen can also be accessed at any time through the **Incident Status** screen by clicking on the *Security* icon.



Agency Only- Selecting this button will restrict the **Incident Report** to users at your agency only.

For Public Release- Clicking the button to turn it gray will cause NOT FOR PUBLIC RELEASE to be printed across the top of the **Incident Report**.

Update All Supplements - Selecting this button updates all supplements you have access to.

Incident Security Levels- A user can set the Incident's security level at a level equal or less than their security rights. This means other users at that level or above would have access to the report across all agencies (unless the Restrict to Agency Only is selected).

Security Groups- Available security groups can be selected which will allow any user in the selected group to have access regardless of their individual security level. If Restrict Access to Selected Security Groups is selected, the Incident Report can only be accessed by members of the selected Security Group.

Default Security Template- When this checkbox is checked, future supplements will have the same security level, workgroups, and agency-only flag as this supplement.

Hide Incident - Only displayed for authorized users. If checked, the incident is not visible except to users within the incident security level.

### **Incident Management**

#### Assign Supplement

Supervisors can create a Supplement to an Incident Report and assign it to another user.

- Click Assign Supplement in Incidents menu.
- Search for and select the Incident to which you wish to create the Supplement.
- Click Assign Supplement at bottom of page.
- Enter the Reporting Officer you want to assign.
- Click **Assign Officer** at bottom of page.
- You will be prompted to create a comment for the officer.
- Click Assign at the bottom of page.
- The officer will receive a Notification regarding assignment.

#### Delete Incident Report

Reports can be deleted by users who have ownership of the report or by Supervisors.

Once a report is selected, the user can delete the report. A confirmation screen appears and users are required to give a reason for the deletion.



**Note**: Reports that are deleted are not recoverable from the database.

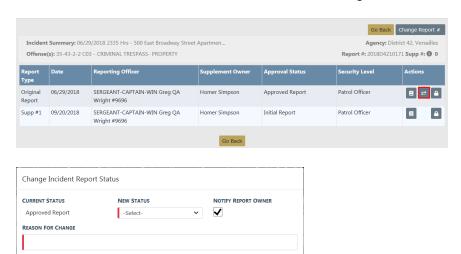
#### Incident Status

Users can view the status of a report from this location. The different report statuses are:

- Initial Report
- Pending Approval
- Approved Report
- Disapproved Report

Supervisors can use this section to change the status of a report from *Approved Report* to either *Initial* or *Disapproved* status to allow the user to edit the report. Every change in a report's status is tracked in the **Status History**.

From the Incident Status screen, click on the Change Status icon.



Select a new status from the drop-down menu and enter the reason for the change, you also have the ability to select to notify the report *Owner of the Status Change*.

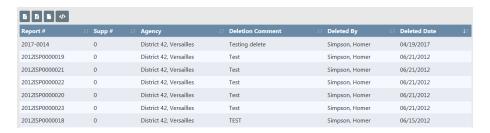
Cancel Update Status

#### Incident Status Log

This area is where users can search for an incident and obtain a *History* of the status changes and/or updates for any report.

#### Incident Delete Log

Deleted reports are listed in a report log with all the pertinent information for the report, including the required reason for the deletion.



Note: Remember that deleted reports cannot be recovered.

## **Using Charts to Visualize Data**

**Charts** provide a mechanism to users to visualize data in a quick and efficient manner right from the home page. There are two different types of charts we offer

- Non-interactive image charts which appear right on the home page,
- A menu of Interactive charts which can be accessed on the right side bar.

#### Home Page Image Charts

These charts are not interactive and are meant to give a very quick summary of data. As of our current release, they include:

- Offenses Last 24 Hours- This is a pie chart which summarizes offense in the last 24 hours. The offenses are grouped according to their NIBRS codes to offer simple categories such as larceny, assault, etc... Note that this chart's functionality is expanded in the interactive charts Offense Activity and Snap Shot, which are described below.
- Non-Approved Reports This pie chart shows counts of all initial incident reports
  (Supp 0) which are not approved (i.e. either in initial status, pending approval, or
  disapproved). A more interactive version is available in the interactive charts,
  described below.

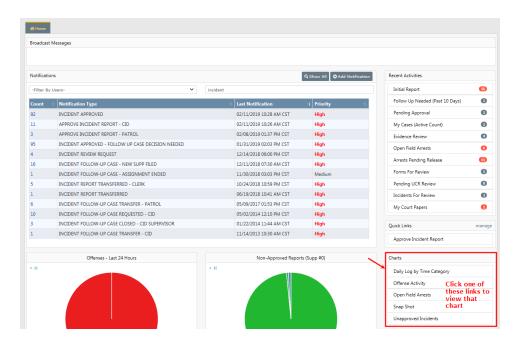


Above is an example of how the image charts are shown on the Online RMS home page

Chapter 21. Supervisory Functions

### Interactive Charts

**Interactive Charts** are accessible from the right side bar of the home screen. Look for the section labeled **Charts**.



When you click on a chart link, a new tab opens on the home page to display that chart. Click on the  $\mathbf{X}$  to close the tab.



Some charts have controls such as date ranges to allow you to customize the data you want to see.

Various Interactive Charts are available.

- Daily Log by Time Category
- Offense Activity
- Open Field Arrests
- Snap Shot
- Unapproved Incidents
- Calls for Service

### Offense Activity

This chart displays offenses, by count, for various date ranges, and even allows you to display offense counts based on the time of day. The **Select a Display** select box allows you to choose what date range you want for visualizing data. It will either display a daily or monthly view depending on which range is selected. For example, the week to date option would show a daily view; however month to date & last month has far too many days to make sense on a graph, so it is shown in a monthly view.

You can also select **Show Results by Time of Day** to change the display to group offenses based on the time of day the occurred. The time of day is split up into four hour intervals starting from midnight.

The **Agency** filter is available for multi-tiered agencies to view events at the top organization level for all agencies, or an individual agency beneath the parent organization.

Regardless of the display you select, results will be shown in color coded *Stacks*, with a legend at the bottom indicating what colors represent what offenses. You can hover the mouse over a particular section to show the offense type & count, and you can click

on a section to bring up a list of actual Incident Reports containing those offenses on that date / time.

When viewing the incidents, you can click on the **Quick Tab** icon in the *Actions* column to open another tab which will give you a summary for that Incident Report. This is similar to the Incident Summary Page, but is presented in a view-only manner to give you quick access to the report.

### **Open Field Arrests**

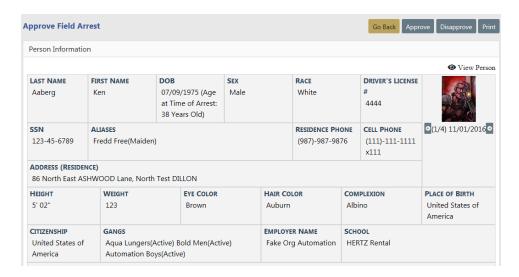
This bar chart identifies Arrests that are in *Open* or *Pending Review* status.

As a Officer Supervisor you can open the **Field Arrest Chart** and drill down to the details to either approve or disapprove the **Field Arrests**.

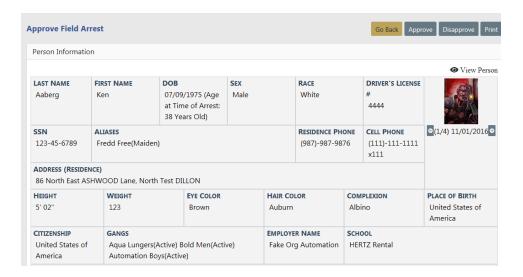
Hover your mouse over the blue boxes to see a total count, and click the blue boxes to display details of those counts in the bottom grid.

Click on the icons to the right to *view* or *review* an entry in the bottom grid. If an icon does not display, then you do not have access to that function.

The View icon opens the View Field Arrest form. For more information on the disapproval process refer to ApproveDisapproveFieldArrest.htm



The Review icon opens the Approve Field Arrest form, where you can Approve, Disapprove, or Print the Field Arrest. For more information on the approval process refer to ApproveDisapproveFieldArrest.htm.



### Snapshot

This is a by-the-numbers chart which varies based on what features your agency has access to. Currently it contains the following:

- A count of offenses.
- A count of citations based on the citation type.
- A map showing incident data.

This chart has a **Select a Display** option which allows you to select different date ranges. It is different from other charts in the date range options it presents, as it is only meant to display very recent data.

### **Unapproved Incidents**

This is a more interactive version of the Non-Approved Reports chart featured on the home page. It gives you the option to display only initial incident reports (supplement 0) which are currently not approved (Initial, Disapproved, or Pending Approval), or all supplements not approved. You can click on a section of the chart to bring up a list of the incidents that fall under the category you clicked. You can then use the **Quick Tab** icon in the *Actions* column to view the details of the report.

#### Calls for Service

You can view CFS event imported from CAD or directly entered via the Online RMS module. The chart provides awareness of activities for shift briefings. Time ranges allow users to view events from a prior shift or particular time frame. Geo-coded events are available for plotting on a map display. You can filter by agency and user groups.

# Chapter 22. Case Management

## **Case Management Overview**

**Case Management** is controlled based on one of three options selected by your agency:

- The approving officer supervisor can create a Case and send the notification to the CID supervisor for assignment, or not create a Case and not send a notification to the CID supervisor.
  - If a decision to create a Case is made, the supervisor creates it and assigns it to a lead investigator, and if appropriate an officer.
  - The supervisor approving the report selects a follow-up action and disposition. An *Incident Approved* notification requesting a *Follow-up Case Decision* is forwarded to a person or persons with a CID Supervisor Role (determined by the agency) for review. The CID Supervisor then reviews the *Incident* and decides to close the *Incident* without further follow-up, or to create a follow-up Case, and assign it to an officer.

For information on closing an Incident without a follow-up case, refer to "Close Incident with no Follow-Up Case" on page 458

- All approved Incidents are sent to the CID supervisor for a **Case** creation decision.
- No Case is automatically created and no notification is sent to the CID supervisor.
   The CID supervisor must manually create any Cases using the Case Management module.

## What is the difference between an Incident Report and a Case?

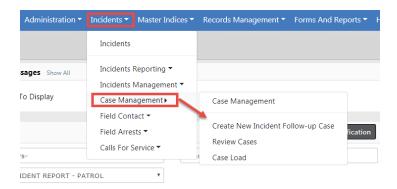
In Online RMS, when a user takes a *Report*, he creates an **Incident Report**. If the type of report written needs follow-up activity, that **Incident** can then be associated with a follow-up **Case** for investigative purposes.

A **Case** is a way to manage the investigative process for one or multiple **Incident Reports**. For example if you have several burglary reports and suspect that all the

burglaries are connected, each burglary will have its own **Incident Report** but all the reports can be assigned to one **Case**. This allows anyone investigating the burglaries access to all the information in one location without having to look up the individual reports. Cases can have more than one officer assigned to them. The officers have the ability to add notes to their cases and can send those notes to their supervisors to keep them updated.

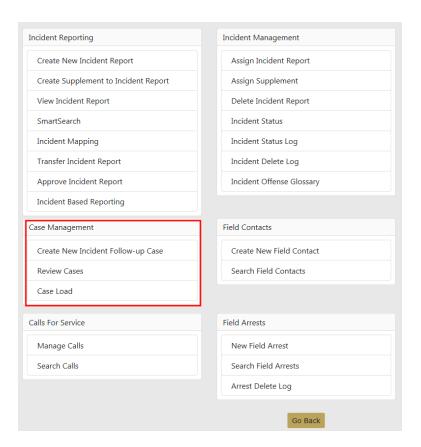
## Accessing the Case Management Module

**Case Management** functions are centrally located under the *Incidents Menu* on top *Navigation Bar*.



Case Management functions can also be accessed from the Incidents Page.





## **Case Management Form**

### Pin Case

While viewing or editing a Case record, you can *Pin* it to your Home Page for quick reference.

To *Pin*, click on the green **Pin Case** button located on the top left of the page; the button color then changes from green to gold and the label changes to **Unpin Case**.



To unpin, click on the gold Unpin Case button.

For more information on pinned records that appear on the Home Page, refer to "Home Page " on page 8.

### Case Management Contains Four Tabs

### 1. Case Information

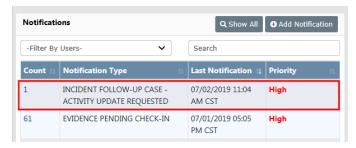
 Contains detailed information about the case, such as the case number, agency, status, security level, important dates, assigned officers, associated incidents, associated field arrests, associated field contacts, offenses, involved names and organizations, involved warrants, associated LEA cases, and attachments.

#### 2. Case Activities

- The Case Activities tab contains activities on the case such as notes made by the
  officer or investigating officer, status and type of activity performed on the case,
  important dates, and the hours worked on each activity. You can also assign
  officers and other information when adding a Case Activity.
- On an existing Case Activity, with appropriate permissions you can request an update from all assigned officers by clicking on an icon.



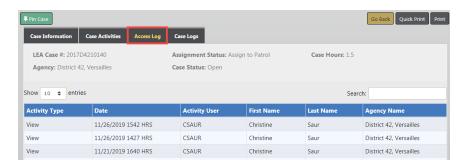
The assigned officers receive a *Notification* to update the Case Activity. The Notification appears under the *Notifications* grid on their *Home* page. For more information on Notifications, refer to "Notifications" on page 23.



### 3. Access Log

The system automatically logs when the case is viewed or updated. The log captures the user's name, agency, and the date it occurred. The Access Log tab displays those log entries in a read-only format.

Chapter 22. Case Management



#### 4. Case Logs

Activity that occurs on the case.



## Create a Follow-Up Case

Multiple methods are available in creating a follow-up Case, depending on your permissions:

- From the initial unapproved Incident, investigators can create a case to begin working on an investigation without waiting for Incident approval.
- During the Incident review process. Incidents can be reviewed during the approval process, from a Notification, or from the Follow-Up Needed link under Recent Activities.

For information on the Incident approval process, refer to "Approve/Disapprove Incident Report" on page 411.

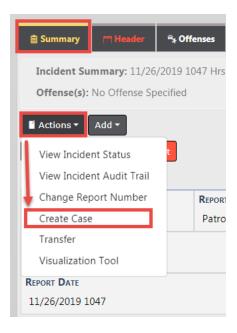
From the Case Management menu.

For information on accessing Case Management, refer to the Access Case Management Module section of CaseManagementOverview.htm.

### Initiate from the Initial Unapproved Incident Report

Create an investigative case directly from an initial unapproved Incident report. You must have the permission Create Case from Unapproved Incident to access this feature. Refer to your agency administrator for details.

1. On the initial unapproved Incident report, click the Action button from the Summary tab, then select Create Case from the drop-down menu.

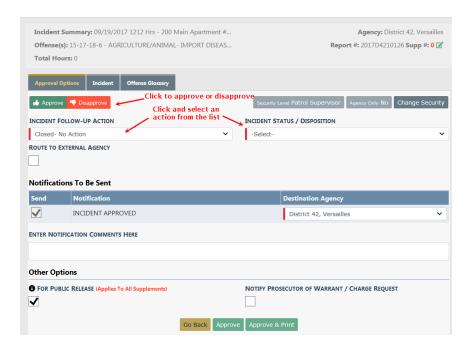


2. The Add Case screen appears. Enter the Case data then save. For more information on entering data, refer to "Enter Case Data" on page 447

## Initiate through Incident Review

- 1. Create a Case while reviewing the Incident. Review the Incident by choosing one of the following methods:
  - From the Approval Process

- The supervisor selects an **Incident Follow-up Action** of either *Follow-up Patrol*, *Follow-up CID*, or *Suspend/Pending Further Info*.

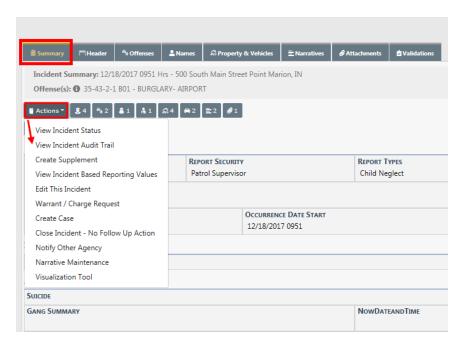


- A prompt appears to approve the Incident and create a **Case**. Electing to approve creates the **Case** and allows you to assign a Lead Investigator, and if appropriate, assign officer(s) to follow up with the Incident.
- · From a Notification
  - Users with the CID Supervisor role (determined by the agency) can review the report from the Notification.
- From the Follow-Up Needed link under Recent Activities
  - Click on the Follow-Up Needed link to review the Incident report and make the
    decision to create a Follow-up Case to the Incident, or close the Incident
    without a follow-up case.



For information on closing an Incident without a follow-up case, refer to "Close Incident with no Follow-Up Case" on page 458

2. Review the Incident using whichever method you wish, then click on the **Actions** button on the top left of the Incident Summary tab to view menu options.



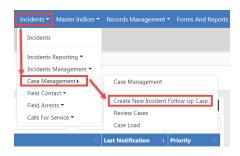
3. The CID Supervisor selects the **Create Case** menu option.



4. The Add Case screen appears. Enter the Case data then save. For more information on entering data, refer to "Enter Case Data" on the facing page

### Initiate from the Case Management Menu

1. Create a Follow-Up Case from the Case Management Menu.



For additional methods of accessing the Case Management menu, refer to the Access Case Management Module section of CaseManagementOverview.htm

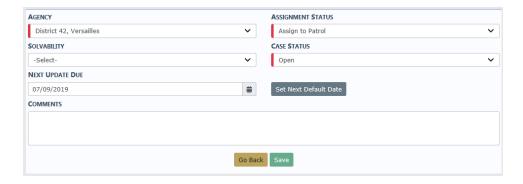
2. The Add Case screen appears. Enter the Case data then save. For more information on entering data, refer to "Enter Case Data" below

### **Enter Case Data**

You can enter Case data when you create a new Case or update an existing Case.

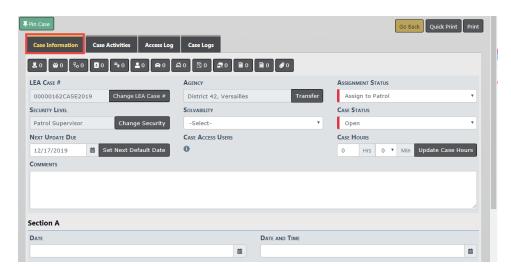
 If you are creating a new Case, initiate a new Case Follow-Up by using an available method. For details on the available methods, refer to "Create a Follow-Up Case" on page 443.

The Add Case page appears.



Enter necessary data then click the **Save** button to open the *Edit Case* screen.

- 2. If you are updating an existing Case, search for the Case then choose update to open the *Edit Case* screen. For more information on searching for and updating a Case, refer to "Review Cases" on page 462
- 3. The Edit Case screen contains four tabs: Case Information, Case Activities, Access Log, Case Logs. The Case Information tab opens by default. For general information about the four tabs, refer to "Case Management Overview" on page 439.



**Note:** While viewing or editing, you can *Pin* the Case at anytime to add it to your Home Page for quick reference. For more information, refer to "Case Management Overview" on page 439.

Note: You can print a report wherever the print icon or print button displays. For details, refer to "Print Case" on page 478.

- 4. Select an **Assignment Status** which allows the assignment of the case to either Patrol or CID. A **Case Status** must also be chosen. Set a **Solvability** to the Case, set an **Next Update Due**, and add a **Comment**.
- 5. The LEA Case # generates automatically. If you chose to change the LEA Case #, select the Change LEA Case# button, select an existing Incident Report number when prompted, then click OK.
- 6. The CID Supervisor has the ability to change the security level of the Case by clicking on the **Change Security** button to open the *Edit Case Security* screen. After changes are made, click **Save** to return to the *Edit Case* screen.
  - For more information on setting the security level, refer to "Set Case Security Level" on page 457.
- 7. Next, the CID Supervisor will select the **Solvability** of the Case from the drop-down.

- **8.** The CID Supervisor has the ability to change the **Next Update Due** date. The default is 60 days.
- 9. Next is the **Assignment Status**. The selections available vary by agency.
- **10.** Next, the CID Supervisor will choose the **Case Status** from the drop-down selection.
- 11. The CID Supervisor has the ability to hover over the information bubble near the Case Access Users to see all the individuals who have access to the Case. If the CID Supervisor chooses to change the Security level of the case, they will select the Change Security button and select the security level to which they feel appropriate for the Case. Remember, if a patrol officer is assigned to the Case and Case is set at the Criminal Investigations Division, the Patrol Officer will not be able to access the Case.
- 12. Each Officer and Supervisor assigned to the Case has the ability to log the Case hours by using the Case Hours fields. After selecting the appropriate hours, select Update Case Hours.
- 13. Finish completing the upper section of the Case, then select the **Update** button.

**Note:** There are icons located under the *Actions* column throughout the remaining sections of the Case. Hover your mouse over each icon for a description of what each one does: Review incident security/status, view incident, create a new supplement, associate an incident, print, and delete.

**14.** Page down to the *Assigned Officer(s)* section. Click on the **Assign Officer** link to assign an officer.



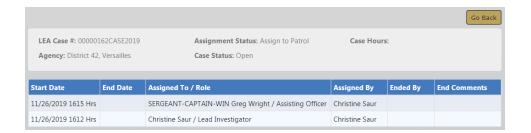
**Note**: One Lead Investigator Officer is required. The CID Supervisor must assign a Lead Incident Officer.

For more information on assigning officers, refer to #AssignCaseOfficer.

**15.** When at least one officer is assigned, a **View Assignment History** link appears in the *Assigned Officer(s)* section.



Click the link to view the assignment history.



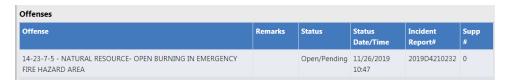
Click Go Back to return to the Case.

16. Page down to the Associated Incident(s) section. The CID Investigator and the Assigned Lead Investigator has the ability to click on Create Incident to create a new Incident from the Case, or click on Associate Incidents to associate other Incidents to the same case. For details, refer to "Associate an Incident" on page 453.

With proper permissions, you can create a Supplement by clicking on the Create Supplement icon under the *Actions* column on Summary tab of the Incident form. If you do not see this icon, then you do not have the ability to perform this action. For more information about creating a Supplement, refer to "Create Supplements" on page 283.

**Note:** Offenses associated with the Incident appear in the Offenses section as read-only.

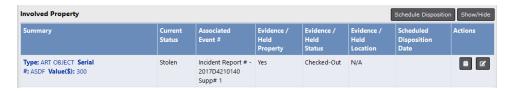
- 17. To associate field arrests to the case, click on Associate Field Arrests in the Associated Field Arrests section. For more information on associating field arrests, refer to "Associate a Field Arrest" on page 455.
- **18.** To associate field contacts to the case, click on **Associate Field Contact** in the *Associated Field Contacts* section. For more information on associating field contacts, refer to "Associate a Field Contact" on page 456.
- **19.** Offenses that exist on Associated Incidents appear for convenience in the **Offenses** section as read-only.



20. Involved persons and organizations on Associated Incidents appear for convenience in the Involved Names and Organizations section as read-only. You have the option to show or hide the details by clicking the Show/Hide button.



21. Associated evidence appears in the **Involved Property** section as read-only.



If you have appropriate permissions, you can schedule one or more dispositions of associated evidence directly from the case and notify evidence custodians.

a. Click the **Schedule Disposition** button to open *Schedule Evidence/Held Property Disposition*.



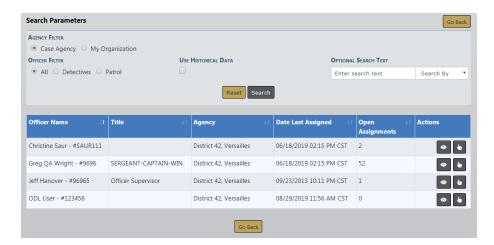
Or, you can schedule an individual property record by clicking the Schedule Disposition Date icon under the *Actions* column on a specific Involved Property record, enter a **Disposition Date** and **Comment** when prompted, then click **Save**.

- b. Check each evidence/held property record that applies, or check the box on the upper left to select all.
- c. Enter the **Disposition Date** and **Comments**.

- d. Check the Notify Evidence Custodians box, if applicable.
- e. Click Save.
- 22. Involved Warrants appear in the **Involved Warrants** section as read-only.
- 23. Click the Associate LEA Case link to associate LEA Cases.
- 24. Attach a form in the Attached Forms section by selecting from the list.
- 25. Click the Add Attachment link to add attachments to the Attachments section. Attachments can be photos or documents.

### **Assign Officer to Case**

- 1. To Assign an officer to the Case, click the Assign Lead Incident Officer or Assign Officer link.
  - The Assign Lead Incident Officer link only appears when a lead Incident officer has not yet been assigned. It defaults the case to the officer who created the incident report. That officer can then be assigned to the case as the lead or as an assisting officer.
  - The Assign Lead Incident Officer link directly assigns the reporting officer to the case and the supervisor selects their role.
- 2. If the Assign Officer link is used, choose from a list of officers to assign to the case. Click the select icon 🛅 to choose an officer from the results list.



3. Select the Role and Assignment Date. Optionally, select the Notify User box to send an informational Notification to officer.



**Note:** You can also assign officers when creating a Case Activity. For more information on creating Case Activities, refer to "Create Case Activity" on page 465.

### Associate an Incident

You can associate an Incident by either creating an Incident directly from the Case or selecting an existing Incident. Page down to the Associated Incident(s) section of the Case and click either the Create Incident or Associate Incident link.

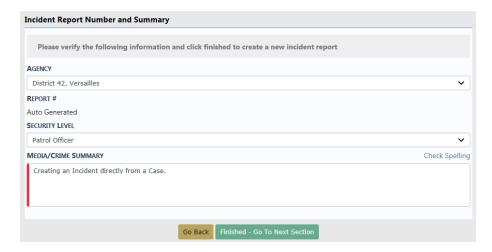


### Create Incident

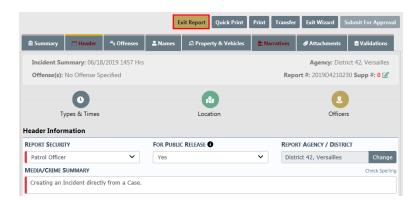
- 1. To create an Incident and associate it to the Case, click the Create Incident link.
- 2. A message appears informing you the newly created Incident will automatically be associated with the Case. Click **No** to return to the Case without creating the Incident, or click **Yes** to create the Incident and continue to the next step.



3. If you chose to create the Incident, an *Incident Report Number and Summary* screen appears. Review and make any necessary changes. Enter comments into the **Media/Crime Summary** text box, then click the **Finished-Go To Next Section** button.



4. The Incident Report wizard opens. Add the necessary information to the Incident Report. Click the **Exit Report** button on the top of the screen at any time to return to the Case. For more information on entering data into various tabs of the Incident Report, refer to "Incident Report Tabs" on page 197.

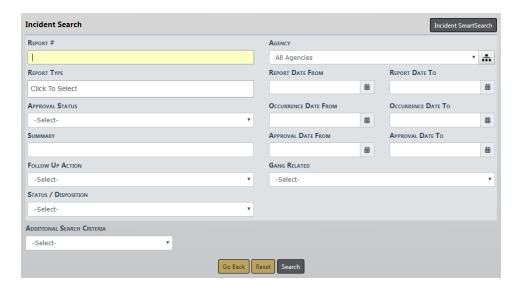


5. The newly created Incident Report appears in the Associated Incidents(s) grid of the Case.



### Associate Existing Incident

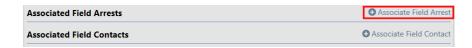
1. To associate an existing Incident, click the **Associate Incident** link to open the *Incident Search* screen.



- 2. Search for the Incident and select it from the results grid. For more information on searching for Incidents, refer to "View Incident Reports" on page 261.
- 3. The selected Incident Report appears in the Associated Incidents(s) grid of the Case.

### **Associate a Field Arrest**

1. To associate a Field Arrest to the Case, click the Associate Field Arrest link.



2. A Field Arrest Search screen appears.

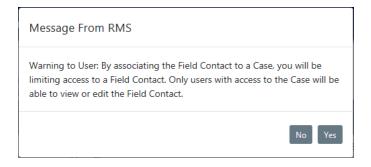
- Search for the Field Arrest you want to associate to the Case. For details on searching for a Field Arrest, refer to "Search Field Arrests" on page 342.
- 4. Select the appropriate Field Arrest from the results grid by clicking on select icon in the Actions column. The selected Field Arrest then appears under the Associated Field Arrests section of the Case.

### Associate a Field Contact

1. To associate a Field Contact to the Case, click on the Associate Field Contact link.



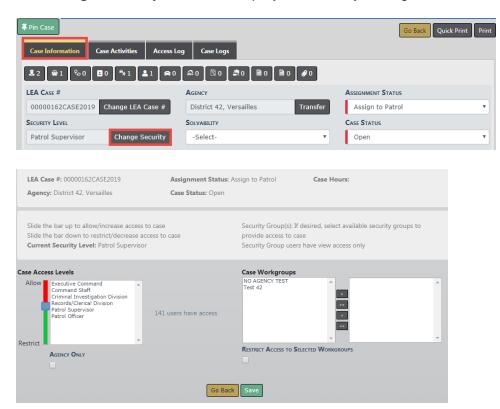
- 2. A Field Contact Search screen appears.
- 3. Search for the Field Contact you want to associate to the Case. For more information on searching for a Field Contact, refer to "Search for a Field Contact" on page 394.
- 4. Select the appropriate Field Contact from the results grid by clicking on select icon in the Actions column.
- 5. A warning message appears informing you that by associating the Field Contact to the Case, limited access to the Field Contact occurs. Only users with access to the Case are able to view or edit the Field Contact. Click No to return to the Case without associating the Field Contact, or click Yes to associate the Field Contact to the Case.



6. If you chose Yes, the selected Field Contact then appears under the Associated Field Contacts section of the Case.

### Set Case Security Level

1. To set the **Security Level** of the Case go to the top of the Case Information tab. Click the **Change Security** button to display the *Security Setting* screen.



The CID Supervisor only has the ability to restrict up to the level of *Criminal Investigations Division*. If they restrict further, the would not have access to the Case. At this point, the CID Supervisor has the ability to see what users have access to the Case.

2. To adjust the security slide the bar up or down that is located just left of the Case Access Level. Sliding the bar up will allow more users access to the case, sliding the bar down will restrict access. Security can further be adjusted by assigning the case to a Security Group. Anyone within the Case Access Level box, and persons included in the Security Group, will have access to the case. If the box located below the Security Group is checked, this will restrict access to only persons in the Security Group and the officer assigned to the case.

Note: If the user making the assignment is not part of the Security Group they will not have access to the case if the Restrict Access box is checked.

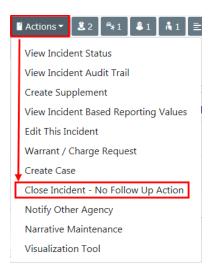
3. Click the Save button.

Ensure that person(s) who are not supposed to have access to the incident report cannot access the report; the incident security must be set. Associating a report to a "Case" which has restricted access will NOT restrict access to any incident report associated with that case. The incident report security has been restricted as well if you want to secure the incident report access. Incident security can be set at the time of approval of the report or by the USER reviewing the incident report. The supervisor reviewing the "incident report" cannot restrict access above his level. This prevents anyone from "locking" themselves out of the report.

The Lead Investigator along with the CID Supervisor needs to remember that if the Case security is changed, it does not automatically change the security of the associated Incident Report. The Lead Investigator and/or CID Supervisor must also change the security of the Incident Report if deemed appropriate.

## Close Incident with no Follow-Up Case

To close an incident from the review process with no Follow-up Case needed, the CID Supervisor selects the Close Incident - No Follow Up Action menu option from the Actions button.



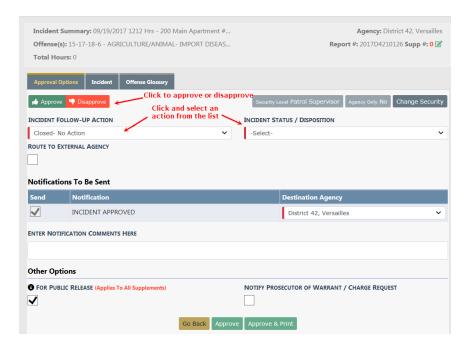
A window appears where the **Incident Disposition** is selected from a list, then select the **Close** button to close the incident with no case follow-up.

The CID Supervisor can also keep an Incident, but not create a **Case**:

When the CID Supervisor decides a **Case** should not be created for the Incident, they select Gosed-No Action for the Follow-up Action and select the reason for the

**Incident Status/Disposition**. Select an **Incident Status**. The report can then be approved by selecting the **Approve** button.

For more information on the Incident approval process, refer to "Approve/Disapprove Incident Report" on page 411.



# **Navigating Throughout the Case**

When a Lead Investigator and/or Officer is assigned a case, in their **Recent Activities** they will see a number next to *My Cases*.



Select the number and the My Active Cases screen opens.



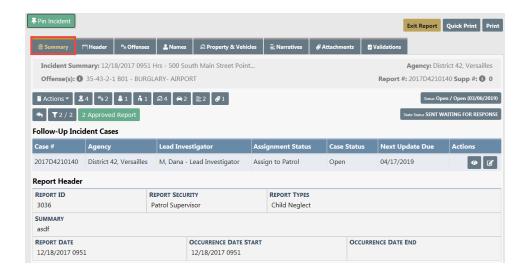
Using the **Tag** icon you can tag cases with keywords you choose, to group cases based on similar actions, suspects, or other information. For more information on tags, refer to "Investigative Case Tags" on page 476.

If offenses are associated with the Incident, hover over the **Information** icon under the *Offenses* column, to see the *Associated Offenses*.

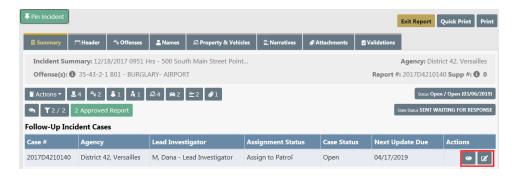
By selecting the hyperlink under *Reference Numbers* you are taken directly to the **Record Viewer** which is a snapshot of the Case.



Select the hyperlink **Open in Incident Summary** and the associated Incident opens on the **Summary** page.



In the section Follow-Up Incident Cases you will have the ability to either view or edit (based on your permissions) the Case.



**Note:** With appropriate permissions, you can *Pin* the Incident while on the Summary tab to add it to your Home Page for quick reference. For more information, refer to "Incidents Overview" on page 185.

Also from the **View Case** page, you have the ability to view the *Case Activities*, *Access Log*, and *Case Logs* tabs.



**Note:** While viewing or editing, you can *Pin* the Case at anytime to add it to your Home Page for quick reference. For more information, refer to "Case Management Overview" on page 439.

## **Review Cases**

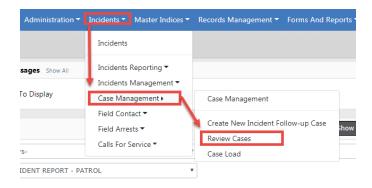
You can search for and review selected Cases to which you have permissions. Review mode provides read-only details of the Case and a data summary of each module to which the Case is linked:

- Assigned Officers
- Incidents
- Associated Field Arrests
- Offenses
- · Involved Names and Organizations
- Involved Vehicles
- Involved Warrants

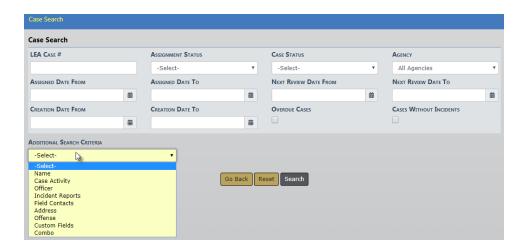
**Note:** While Review mode is read-only, you have the option to toggle to edit mode to apply updates.

#### To review the Case:

1. From the Incidents menu, select Case Management, then Review Cases to open the Case Search screen.



2. Enter the search criteria. The *Additional Search Criteria* drop-down box provides more search options such as, *Field Contacts* and others.



3. Click **Search** to open the *Search Results* page listing the records that match your search criteria.

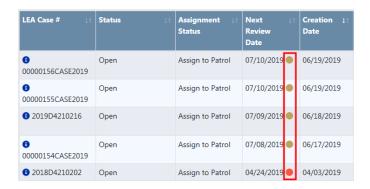


4. You can hover over the information bubble 10 to display additional information.



5. The Next Review Date column uses three color indicators that quickly identifies cases with upcoming review dates, or have surpassed the next review date.





6. The icons in the Actions column allows you to act on the Case such as, Add Case Activity, View, or Edit, respectively. If you do not see one or more of these icons, then you do not have permissions to perform that particular action.



- a. Click on the **Add Case Activity** icon to add an activity. For more information on adding a Case Activity, refer to "Create Case Activity" on the facing page.
- b. Or click the **View** icon to open the Case in view-only mode.



c. Or click the **Edit Case** icon to open the Case in edit mode and make necessary updates to the Case.

For details on entering information on the Case Information tab, refer to "Enter Case Data" on page 447.

For details on entering information on the Case Activities tab, refer to "Create Case Activity" on the facing page.

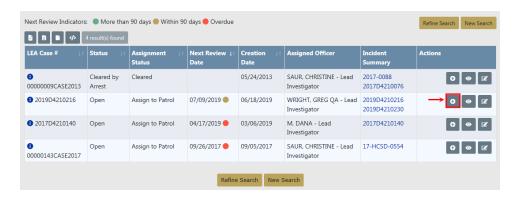
For details on the contents of the Access Log, refer to "Case Management Overview" on page 439.

**Note:** While viewing or editing, you can *Pin* the Case at anytime to add it to your Home Page for quick reference. For more information, refer to "Case Management Overview" on page 439.

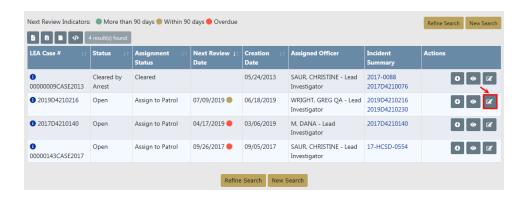
## **Create Case Activity**

The Case Activities tab of a Case contains activities on the case, such as notes made by the officer or investigating officer, status and type of activity performed on the case, important dates, and the hours worked on each activity. You can also assign officers when adding a **Case Activity**.

- 1. Use one of two methods to initiate a new Case Activity record.
- From the Case Search Results screen. For instructions on Case searching, refer to "Review Cases" on page 462.
  - Search for and locate the Case, then click on the Add Case Activity icon the Actions column.



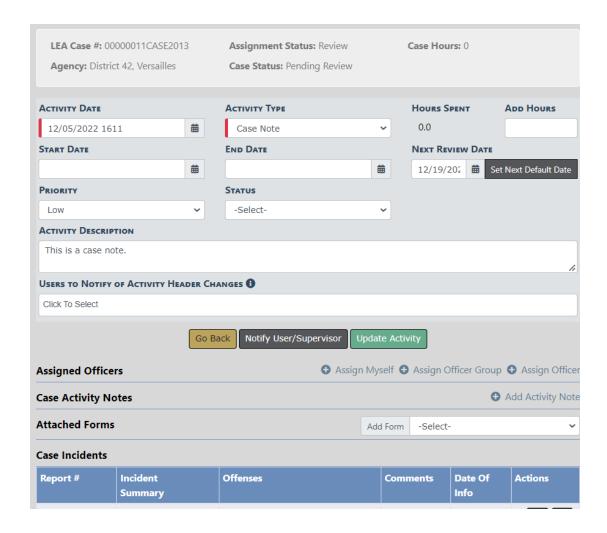
- From the Case Activities tab of the Edit Case page.
  - Search for and locate the Case, then click on the **Update** icon in the *Actions* column.

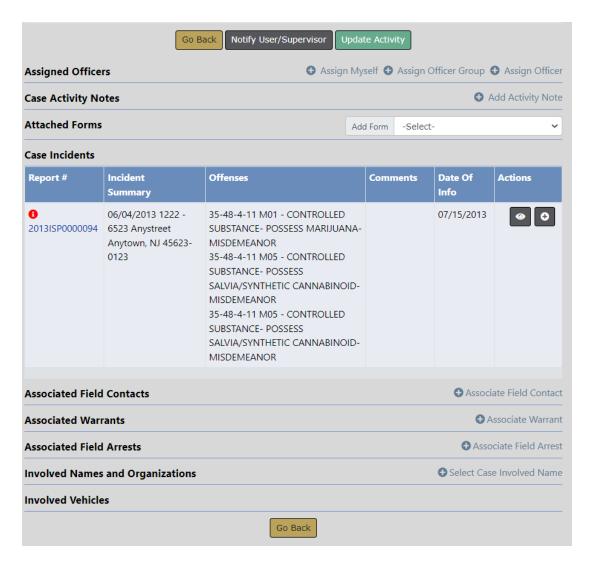


Click on the Case Activities tab of the Edit Case page, then click on Add Case Activity.

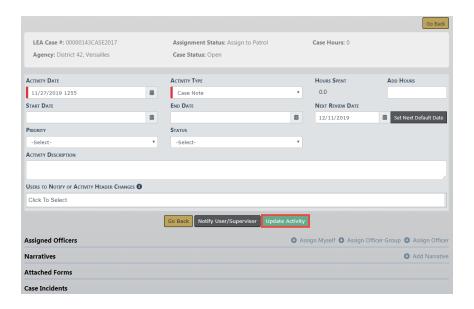


2. The Add Case Activity page opens. Enter the necessary information into the fields provided, then click the Save Activity button.





3. The page changes from Add Case Activity to Edit Case Activity, and the Save Activity button changes to Update Activity.



- 4. Optionally make additional changes or page down and add officers, narratives, and other information to the Case Activity.
  - When adding officers, you can assign yourself as the officer, add an officer group, or assign one officer by clicking on the respective link.
- 5. Custom Field support allows agencies to capture custom data by adding agency specific data elements, such as text fields, list of values, checkboxes, etc. The Custom Field feature must be enabled for it to be available.
  - For more information on adding information to the Case Activity, refer to "Update Case Activity" below.

## **Update Case Activity**

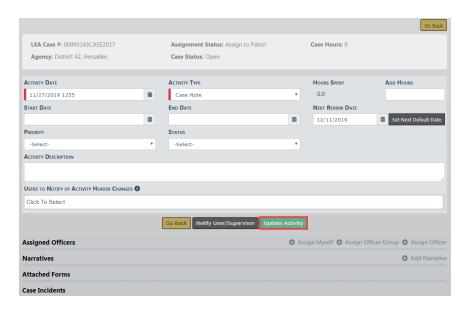
You can update a Case Activity by using one of three methods:

- From the Case Activity tab of an existing Case.
  - For more information on searching and selecting a Case, refer to "Review Cases" on page 462.
- From the My Case Activities link under the Recent Activities section on your Home page. You must be associated with at least one existing Case Activity for the link to appear.
  - For more information on **My Case Activities**, refer to "Show My Case Activities" on page 477.

When creating a new Case Activity.

For more information on creating a Case Activity, refer to "Create Case Activity" on page 465.

1. Open the Edit Case Activity page of the Case Activity you want to update, using one of the methods mentioned above.



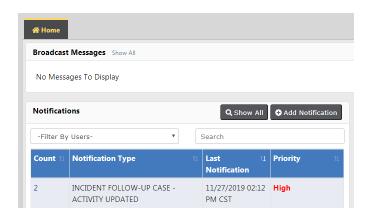
Make the necessary changes to the top section then click the **Update Activity** button to save.

2. To notify specific users of the case update, click the **Notify User/Supervisor** button to open the *Notify User/Supervisor* form.



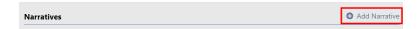
Select one or more **Users** to notify and type a **Comment**.

Click **Send** to send a Notification message to the selected users informing them of the case update. The notification appears on the users home page under Notifications.

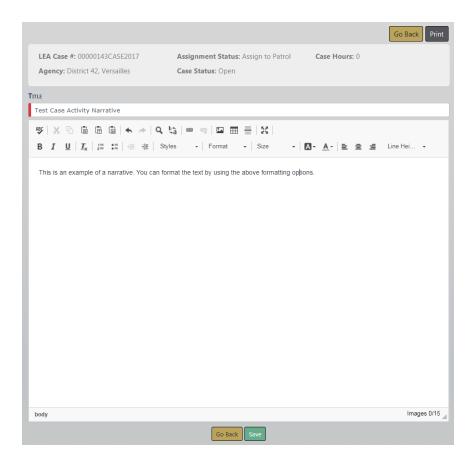


For more information on notifications, refer to "Notifications" on page 23.

- 3. In the Officer section, optionally click the Assign Myself link to add yourself as the officer, click on the Assign Officer Group link to assign two or more officers, or click on the Assign Officer link to add one officer.
- 4. Optionally, click the Add Narrative link to add a Narrative.



Give the Narrative a **Title** and enter your comments using the available format options. The system auto-saves the Narrative every sixty seconds in the event the connection is lost or the computer becomes unusable.



You can use the formatting icons to customize the layout of your narrative. The built-in *Spelling and Grammar Checker* identifies mistakes and corrects them as you type.

You can insert an image by clicking on the Image icon.



**Note**: For more information on Narratives, refer to "Narrative Tab" on page 236.

**Note:** You have the ability to reference the Case Activity Narrative on the Incident Narrative using the Quick Reference icon. For more information, refer to "Narrative Tab" on page 236.

Optionally, click the **Print** button to print the current narrative. For more information on Case printing, refer to "Print Case" on page 478.

Click the **Save** button when you are finished, then click **Go Back** to return to the Case Activity.



With proper permissions, you can view, edit, or delete the Narrative by clicking on the respective icons in the *Actions* column.

5. With proper permissions, you can create a Supplement to a Case Incident that appears in the grid. Click on the **Create Supplement** icon.

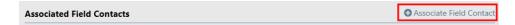


A prompt appears asking you to select the **Supplement Responsible User**.

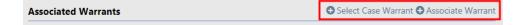


Click into the field then choose an available name from the list, then click **Save** to create the Supplement.

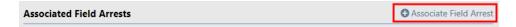
6. Optionally, click on the Associate Field Contact link to search for and select a Field Contact. For more information on searching and selecting Field Contacts, refer to "Field Contacts" on page 391.



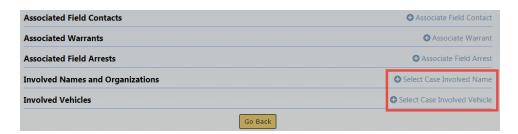
7. Optionally, associate Warrants to the Case Activity. Click on Select Case Warrant to choose a Warrant related to the Case if any, or click on Associate Warrant to search for and select a Warrant that is not related to the Case.



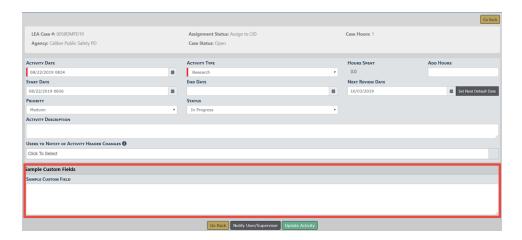
**8.** Optionally, click on the **Associate Field Arrest** to search for and select a Field Arrest. For more information on searching and selecting Field Arrests, refer to "Field Arrest" on page 339.



9. People, Vehicles existing on Incidents, Field Contacts, and Field Arrests associated to a Follow-up Investigative Case will appear to relate to a case activity. If People and Vehicles exists, click Select Case Involved Name in the Involved Names and Organizations section to relate a name and business. Click Select Case Involved Vehicle in the Involved Vehicles section to relate a vehicle.



10. Custom Field support allows agencies to capture custom data by adding agency specific data elements, such as text fields, list of values, checkboxes, etc. The Custom Field feature must be enabled for it to be available. If your agency is using Custom Fields and is configured for Case Activity, the custom fields appear at the bottom of the form.

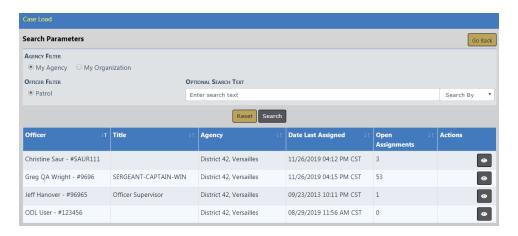


**11.** When finished updating the Case Activity, click **Go Back** to return to the previous screen.

# Case Load

Use the following procedure to view case loads for your assigned users.

1. Select the **Case Load** option from the *Case Management* submenu or click the **Case Load** link on the *Incidents* page to open the **Case Load** page.



- 2. Filter the listings on this page using the My Agency or My Organization radio button that appear in the upper left corner.
- If needed, type text in the Search text box to further limit your search to cases containing that specific text string. You can also select from the Search By drop-down box.
- 4. Click the **Search** button to display just those cases or click **Reset** to clear the criteria.
- 5. Click the view icon under the Actions column on a particular officer in the grid to view that officer's cases.



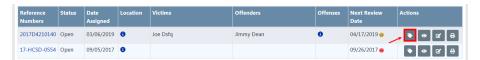
For convenience, the **Offenses** are listed under the *Incident Summary* column.

**6.** If an **MT** link exists in the *Actions* column, click it to display a monthly total for that user.

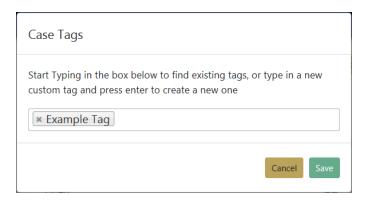
# **Investigative Case Tags**

In *My Active Cases*, you can **Tag** cases with keywords you choose. This allows investigators to increase efficiency by creating their own tags to group cases based on similar actions, suspects, or other information. For more information on accessing *My Active Cases*, refer to "Navigating Throughout the Case" on page 459.

Click on a Tag icon



In the Case Tags window, start typing in the box to find existing tags, or type a new custom tag and press enter to create a new tag. Add one or more tags.



Click Save to create the tag and return to My Cases.

View case counts by Case Tag.



# Show My Case Activities

You have the ability to view a list of your active and completed Case Activities.

1. From your Home page, click on the My Case Activities link under Recent Activities.



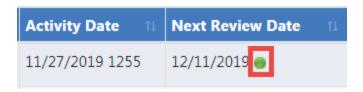
Note: You must have at least one Case Activity for this link to appear.

Color coding provides awareness to assigned users of upcoming and overdue active case activities.

- A red circle indicates one or more case activities are overdue.
- A yellow circle indicates one or more case activities are coming due within 90 days.
- 2. The My Case Activities page appears. Click on the **Show Active Activities** or **Show Completed Activities** button to toggle between the two lists. Whichever button you select, the corresponding list appears in the grid.



The Next Review Date column uses color indicators that quickly identifies cases with upcoming review dates, or have surpassed the next review date.



**3.** With appropriate permissions, you can view or edit your Case Activities. Click on the view or edit icon that appears in the *Actions* column, respectively.



Note: You can edit the Case Activity even when the status is set to Complete.

For more information on updating the Case Activity, refer to UpdateCaseActivity.htm.

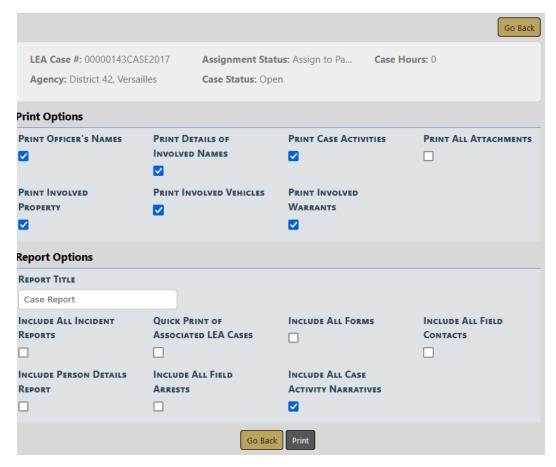
# **Print Case**

You can print a report wherever the print icon 😑 or print button Print displays.

Differences between the print icon and print button:

- . 🖶
  - Generates a PDF document in a new tab that you can either send to the printer or save to a file.
  - Additional print options are not available.
- Print
  - May display additional Print and Report Options that allows you to include or exclude various information on the report.

**Note:** In some instances, such as on the *Case Activity Narrative*, this button generates a PDF document without providing additional print options.



- 1. Select the options you want to include on the report. Certain options may display additional fields when checked.
- 2. Enter a custom Report Title if you wish.
- 3. Click **Print** when finished making your selections.
- 4. A PDF document appears in a new tab. Either print directly to the printer or save to a file.

# Chapter 23. Evidence/Property Mgmt Module

# **Evidence/Property Mgmt Module Overview**

The **Evidence/Property Management Module** captures descriptive information about property that is introduced as Evidence or Held Property. This property can be associated with incidents, cases, offense, and other system modules. Unlimited multimedia files and documents (receipts, court documents, etc.) can be associated.

Property must exist in the *Master Property Index* for it to be introduced as evidence or held property. For information on Master Indices, refer to "Master Indices Overview" on page 81.

The evidence custodian is responsible for tracking evidence or held property after an officer has placed it in one of the temporary storage locations. The evidence custodian typically takes the property from the temporary location and places it in a more permanent location in the agency's evidence or held property room. Every action taken with a piece of property can be tracked in the Online RMS **Evidence/Property Management Module**.

#### Other available features:

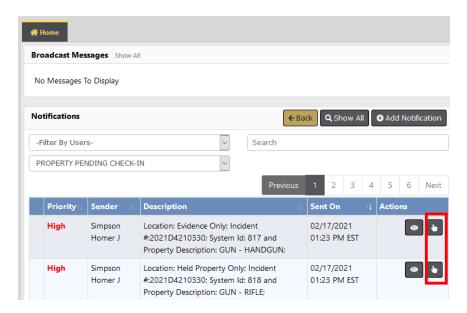
- A full Chain of Custody log is captured and can be searched.
- The system supports bar code reader for easy check-in and checkout.
- Mass Checkout can be performed when there are many pieces of evidence or held property associated with the same incident.
- Evidence Disposition and Disposal are tracked by the system.

# **Check-In From Notification**

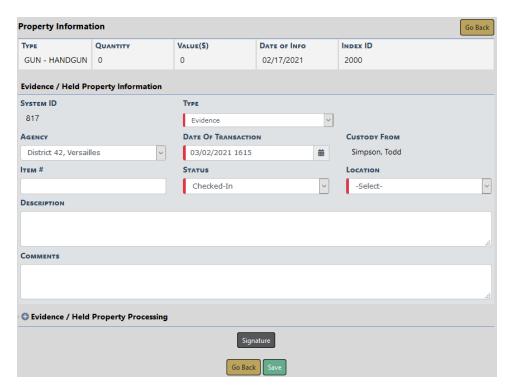
The first step in taking ownership of a piece of evidence or held property is to complete a **Check-In**. This can be accomplished by taking *Action* on the system generated **Notification** which is the most common process. The **Check-In** process is also available

within the **Evidence/Property Management Module**. For more information refer to "Check-In" on page 489.

Click on the Select icon **Take Action**.



Complete the required fields, then click the **Save** button.



The **Description** and **Comments** can be edited by the custodian, and **Evidence Processing** can also be added.

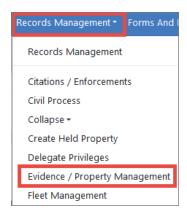
Select the **Location** and make any other necessary changes.

Click the **Signature** button to sign if needed, or click **Save** to take the action. The Notification no longer appears on the *Home* screen.

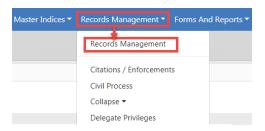
# **Evidence/Property Mgmt Access**

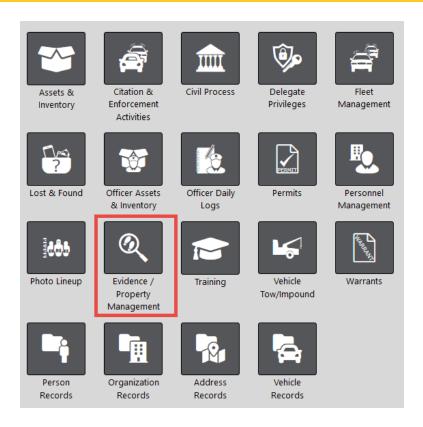
There are various access points to Evidence/Property Management functions, depending on your permissions:

• To open Evidence/Property Management, click on the Records Management top menu, then click on the Evidence/Property Management sub-menu.



Or, click on the **Records Management** top menu, click **Records Management** again, then click **Evidence/Property Management**.





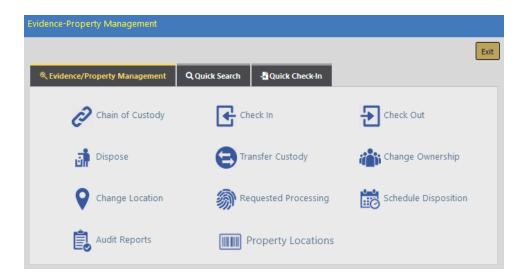
For more information, refer to "Evidence/Property Management Landing Page" on the facing page.

 To quickly create a Master Property Index record for held property, click on the Records Management top menu, then click on the Create Held Property submenu.

**Note:** This option is only available to users with the *Evidence - Create Held Property* permission.

The *Add Property* form opens. For detailed instructions, refer to "Adding Property" on page 116.

# **Evidence/Property Management Landing Page**

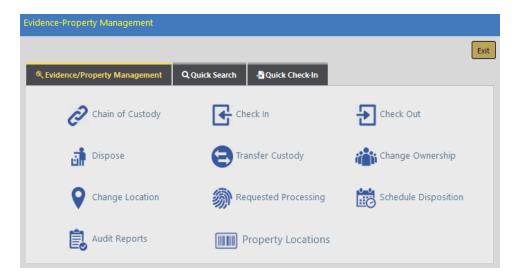


The Evidence/Property Management landing page contains three tabs:

- Evidence/Property Management
  - Contains a link to all the property management functions. The Evidence-Property
     Management screen defaults to this tab.
- · Quick Search
  - Allows you to search property records by System ID, Incident Report #, or both. Additional search options include Officer First Name, Officer Last Name, and Officer Badge #. You must fill in at least one. (Name search is available in other searches as well, not just Quick Search.)
- Quick Check-In
  - Allows you to Check In property quickly by using the barcoded System ID and Location Code.

For details on accessing the *Evidence/Property Management* module, refer to "Evidence/Property Mgmt Access" on page 483.

# **Evidence/Property Management Tab**

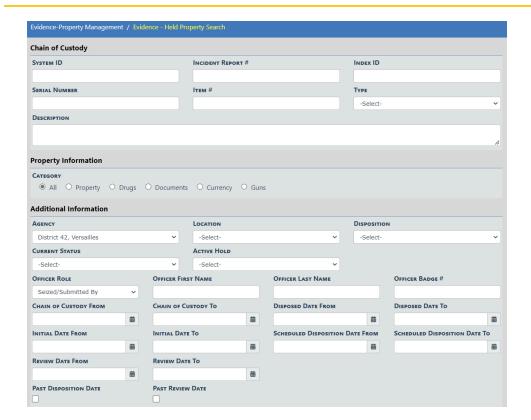


The Evidence/Property Management tab contains several links.

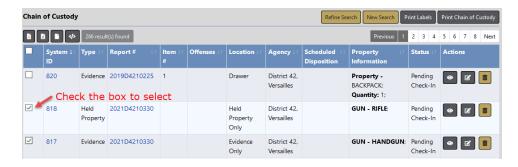
For details on accessing the *Evidence/Property Management* module, refer to "Evidence/Property Mgmt Access" on page 483.

## Chain of Custody

This screen has a wide range of functionality. The evidence custodian can search using any of these fields (fields may change and offer drop-down selections based on category selection):



Enter your search criteria then click the **Search** button to display the *Chain of Custody* Search Results screen.

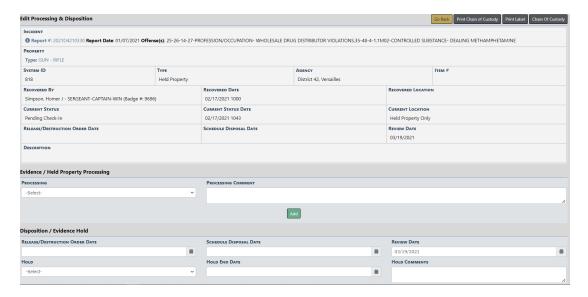


Select one or more records to **Print Labels** or **Print Chain of Custody** for the selected items. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 511.

Will appropriate permissions you can **View**, **Edit**, or **Delete** specific Chain of Custody records by clicking on the appropriate icon under the *Actions* column. For example, if you have appropriate permissions to edit a chain of custody, you have the option to add attachments using the **+ Add Attachment** link at the bottom of the screen. If one or more icons are absent then you do not have authority to perform that particular action.

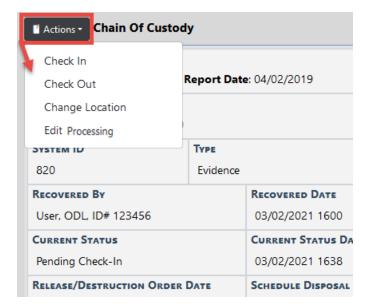


From the *Edit Processing & Disposition* screen you may place a hold on a piece of evidence, add attachments, add comments, etc.

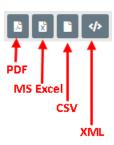


Click on the System ID link to view additional Chain of Custody Action items.





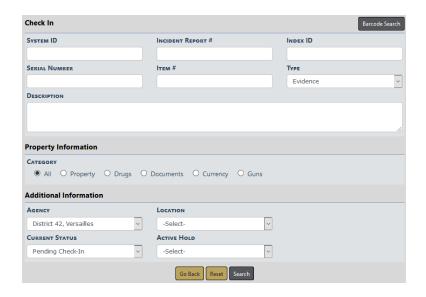
You can export the search results to various file types:



For more information on exporting results, refer to "Export Search Results" on page 35.

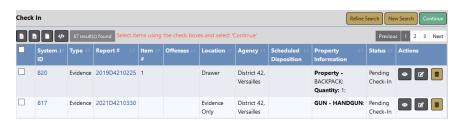
#### Check-In

The **Check-In** link allows the user to search for evidence or held property to **Check-In**. The *Evidence/Held Property Search* screen defaults to search on *Pending Check-In*, but you can also search on *Checked-Out* for purposes of checking it back in.

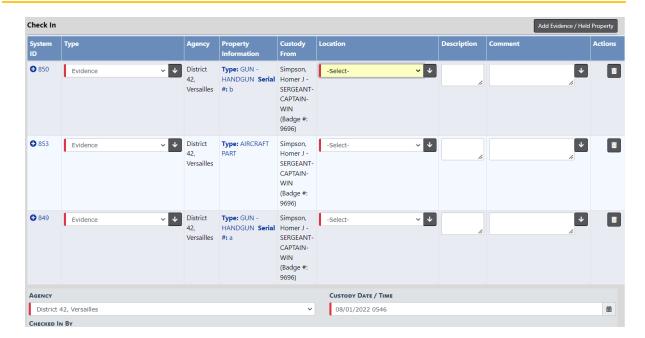


Enter your search criteria then click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The Check In Search Results screen appears.



Check the box on the left of the record you want to Check In then click the **Continue** button to display the *Check In* screen. (You may select multiple records for mass check-in.)



Choose the **Type** from the drop-down list.

Choose the Location from the drop-down list.

**Note:** The **Location** values are filtered based on whether the item is evidence or held property.

Add a **Description** and **Comment** for each item as required.

If you wish, you can also add additional evidence items to the **Check In** list by clicking on the **Add Evidence** button on the top right of the screen. The **Add Evidence / Held Property** button takes you back to the *Evidence/Held Property - Check In* screen. Follow the same process as above to search and select the Evidence you want to add then click **Continue**. The additional Evidence is then added to the **Check In** list.

Make other changes if needed, then click the **Signature** button to sign if necessary.

Click **Save** to save your changes and remain on the page to print **Receipts**, **Labels**, or **Chain of Custody**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 511.

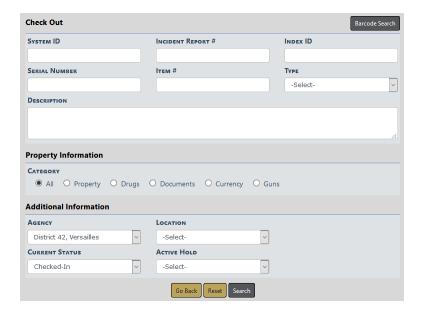
Click **Save & Exit** to save your changes and exit the page.

**Note:** If you <u>are not</u> in a *Multi-tier Organization*, the **Status** will default to *Check-In* and the **Location** will default to the previously checked in location, if it exists. **Note:** An Evidence Custodian taking action on an Evidence Pending Check-In notification will default the **Location** to the previously checked in location, if the **Status** is set to Check-In.

#### Check-Out

The **Check-Out** link will allow the user to search for property to **Check-Out**. The **Status** of the property must be **Checked-In** or **Check-out** to take this action.

Once the item is located and selected, you can document the person it is going to and the destination.



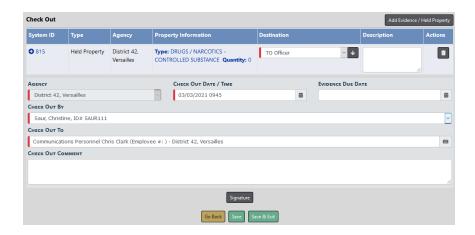
Select a **Category** and enter other search criteria. The fields below the Category change based on your Category selection.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The Check Out Search Results screen appears.



Select one or more records you want to Check Out then click **Continue** to display the *Check Out* screen.



Choose the **Destination** from the drop-down list, enter **Check Out To** and other necessary data.

If you wish, you can also add additional evidence or held property to the **Check Out** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen to open the *Evidence - Held Property Search Check Out* screen. Follow the same process as above to search and select the evidence or held property you want to add, then click the **Continue** button. The additional records are then added to the **Check Out** list.

Click the **Signature** button to sign if necessary.

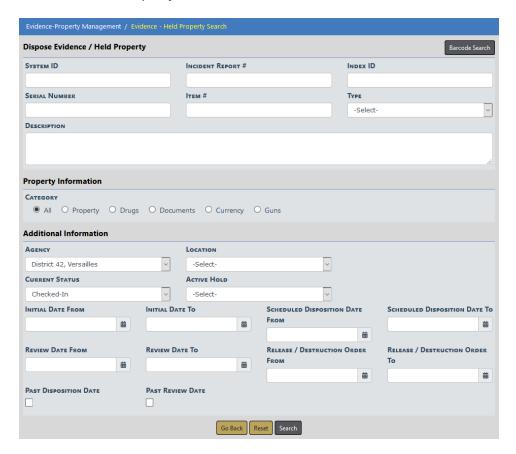
Click **Save** to save your changes and remain on the page to print **Receipts**, **Labels**, or **Chain of Custody**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 511.

Click Save & Exit to save your changes and exit the page.

## Dispose

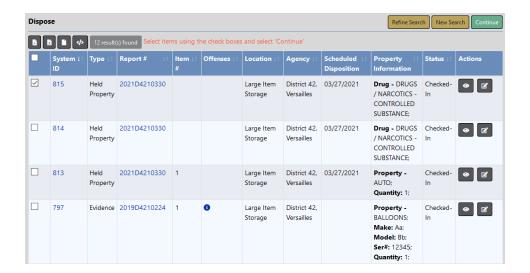
Evidence custodians will use this feature to search for evidence or held property requiring disposal from your evidence or held property room. The **Status** of the evidence or held property must be *Checked-In* or *Checked-out* to take this action. **Dispose** is done when evidence or held property is released to its owner or other person, auctioned, destroyed, or given to another agency.

Click on the **Dispose** link on the **Evidence/Property Management** page to display the *Evidence - Held Property Search* screen.



Select a **Category** and enter other search criteria. The fields below the Category change based on your Category selection.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.



Select one or more records then click **Continue** to display the *Dispose* screen.



**Note:** The **Disposition Date/Time** defaults to the current date. You can change the **Disposition Date/Time**; however, a warning message appears if the date is prior to the check in date.

If you wish, you can also add additional Evidence items to the **Dispose** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen.

Click the **Signature** button to sign if needed.

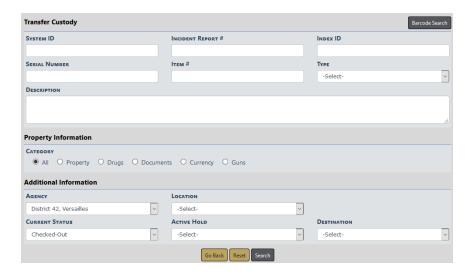
Click the **Save** button to update and **Print Chain of Custody**, **Print Labels**, or **Print Receipt**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 511.

Click the Save & Exit button to apply your changes and exit without print options.

## **Transfer Custody**

The **Transfer Custody** link is used when a piece of evidence or held property that is **Checked-Out** transfers possession to another person. For example, if the original officer taking evidence to court gets sick and hands the evidence to another officer. The Evidence Custodian can show that **Transfer of Custody** within the Online RMS **Evidence/Property Management Module**.

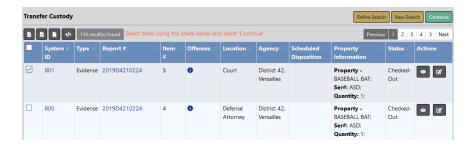
Click on the **Transfer Custody** link to display the *Evidence - Held Property Search - Transfer Custody* screen.



Select a **Category** and enter other search criteria. The fields below the Category change based on your Category selection.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The Transfer Custody Search Results screen appears.



Select one or more records you want to transfer then click **Continue** to display the *Transfer Custody* screen.



Enter the **Custody To**, choose the **Destination** from the drop-down list, and enter a **Transfer Comment** and other necessary data.

If you wish, you can also add additional evidence or held property to the **Transfer Custody** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen to open the *Evidence - Held Property Search Transfer Custody* screen. Follow the same process as above to search and select the evidence or held propertyyou want to add, then click the **Continue** button. The additional records are then added to the **Transfer Custody** list.

Click the **Signature** button to sign if necessary.

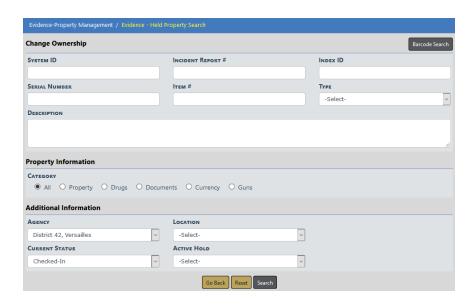
Click **Save** to save your changes and remain on the page to print **Receipts**, **Labels**, or **Chain of Custody**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 511.

Click Save & Exit to save your changes and exit the page.

# Change Ownership

This link will be used to transfer evidence or held property from one Caliber Public Safety agency in a work group to another. The **Status** of the evidence or held property must be *Checked-In* or *Checked-out* to take this action.

Click on the **Change Ownership** link to display the *Evidence - Held Property Search - Change Ownership* screen.



Select a **Category** and enter other search criteria. The fields below the Category change based on your Category selection.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The Change of Ownership Search Results screen appears.



Select one or more records then click **Continue** to display the *Change Ownership* screen.



Enter the **Change of Ownership Comments**, choose the **Ownership To** from the drop-down list if different than what displays, and modify other necessary data.

If you wish, you can also add additional evidence or held property to the **Change Ownership** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen to open the *Evidence - Held Property Search Change Ownership* screen. Follow the same process as above to search and select the evidence or held propertyyou want to add, then click the **Continue** button. The additional records are then added to the **Change Ownership** list.

Click the **Signature** button to sign if necessary.

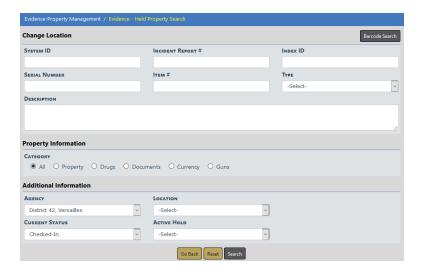
Click **Save** to save your changes and remain on the page to print **Receipts**, **Labels**, or **Chain of Custody**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 511.

Click Save & Exit to save your changes and exit the page.

### Change Location

The Evidence Custodian can use this link to show evidence or held property movement from one place to another. The **Status** of the evidence or held property must be *Checked-In* or *Check-out* to take this action. An example would be moving evidence from one shelf to another within the evidence or held property room. Another example would be consolidating evidence in temporary lockers to make lockers accessible for more evidence or held property.

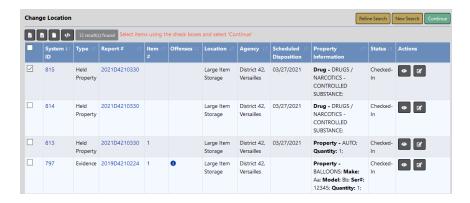
Click on the **Change Location** link on the **Evidence/Property Management** page to display the *Evidence - Held Property Search - Change Location* screen.



Select a **Category** and enter other search criteria. The fields below the Category change based on your Category selection.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The Change Location Results screen appears.



Select one or more records then click **Continue** to display the *Change Location* screen.



**Changed By** defaults to the logged in user. Enter comments, choose the **Location** from the drop-down list, and enter or change other necessary data.

**Note:** The **Location** drop-down list depends on the Status and Type of evidence/property.

If you wish, you can also add additional evidence or held property items to the **Change Location** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen. The **Add Evidence/Held Property** button takes you back to the *Evidence-Held Property Search - Change Location* screen. Follow the same process as above to search and select the records you want to add then click **Continue**. The additional records are then added to the **Change Location** list.

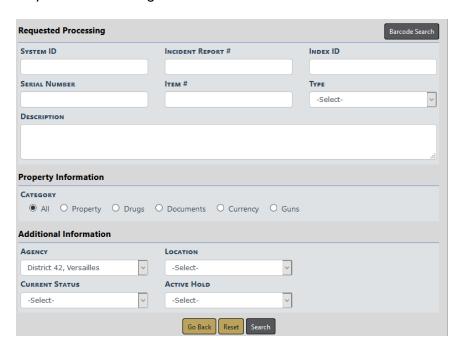
Click the Signature button to sign if necessary

Click **Save** to save your changes and remain on the page to print **Receipts**, **Labels**, or **Chain of Custody**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 511.

Click **Save & Exit** to save your changes and exit the page.

## Requested Processing

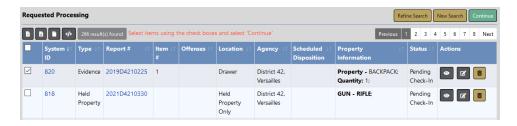
Click on the **Requested Processing** link to display the *Evidence - Held Property Search - Requested Processing* screen.



Select a **Category** and enter other search criteria into fields that appear below the Category based on your Category selection.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The Requested Processing Search Results screen appears.



Select one or more records you want to process then click **Continue** to display the *Requested Processing* screen.



Choose **Processing** from the drop-down list, enter **Processing Comments** and other necessary data.

**Note:** Your agency may elect to require at least one evidence Processing through a configuration setting. Refer to your agency administrator for more information.

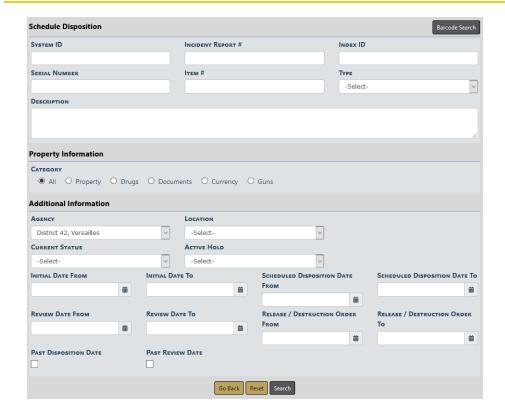
If you wish, you can also add additional evidence or held property to the **Requested Processing** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen to open the *Evidence - Held Property Search Requested Processing* screen. Follow the same process as above to search and select the evidence or held propertyyou want to add, then click the **Continue** button. The additional records are then added to the **Requested Processing** list.

Click **Save** to save your changes and remain on the page where you can optionally **Print Chain of Custody**, **Print Labels**, and **Print Receipt**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 511.

Click Save & Exit to save your changes and exit the page.

#### Schedule Disposition

Click on the **Schedule Disposition** link to display the *Evidence - Held Property Search - Schedule Disposition* screen.

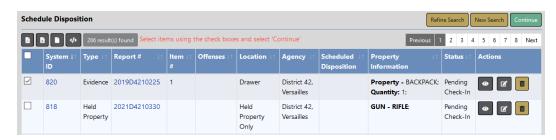


Select a **Category** and enter other search criteria into fields that appear below the Category based on your Category selection.

You can **Schedule Disposition** in mass by searching for Evidence/Held Property related to an incident report, based on a property location, property status, barcode scanning, or Initial Date range and other relevant dates.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The Schedule Disposition Search Results screen appears.



Select one or more records you want to schedule the disposition then click **Continue** to display the *Schedule Disposition* screen.



Choose Disposal Date from the drop-down list and enter Disposition Comments.

If you wish, you can also add additional evidence or held property to the **Scheduled Disposition** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen to open the *Evidence - Held Property Search Scheduled Disposition* screen. Follow the same process as above to search and select the evidence or held propertyyou want to add, then click the **Continue** button. The additional records are then added to the **Scheduled Disposition** list.

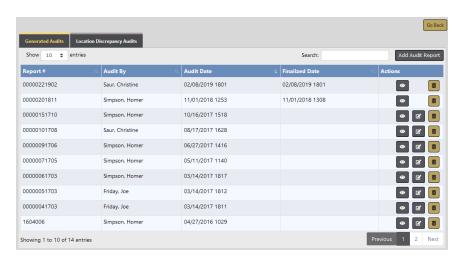
Click **Save** to save your changes and remain on the page where you can optionally **Print Chain of Custody**, **Print Labels**, and **Print Receipt**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 511.

Click Save & Exit to save your changes and exit the page.

## Audit Reports

**Audit Reports** allows Evidence Custodians to perform self-audits of their agency's evidence or held property vault. Perform audits at any time.

Click on **Audit Reports** from the **Property Management** home window to display the available reports.



There are two tabs to the Audit Reports screen:

- Generated Audits
- Location Discrepancy Audits

#### Search Audit Reports

On either tab you have the ability to search for specific reports.

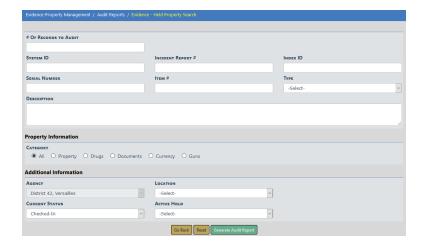
Click in the **Search** field and enter all or a portion of the **data** into the search text box that pertains to the search criteria. The results that match your criteria and entered data display in the grid.



#### **Create a New Audit Report**

You have the ability to generate a new **Audit Report**.

Click the **Add Audit Report** link on the *Generated Audits* tab to open the *Evidence - Held Property Search* form.



Enter the # of Records to Audit and other applicable fields then click Generate Audit Report to display the Audit Report.



If the **Location** is different, uncheck the box to the left, and select the correct **Location** from the list box on the right. Enter any necessary comments.

Click Save Audit to save the report, then click Finalize to add it to the Audit Report list.



Using the icons in the *Action* column you can with appropriate permissions view, edit or delete reports. If an icon does not appear, then you do not have permissions to perform that action. For example, if the edit icon does not appear next to a particular report then you cannot edit that report.

Click the **View** icon to view the **Audit Report** and print labels.



#### **Create Location Discrepancy Audit Report**

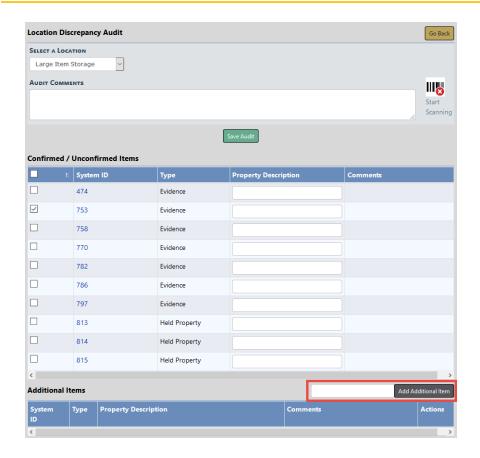
You have the ability to create a **Location Discrepancy Audit Report** from the *Location Discrepancy Audits* tab. This report lists all items currently in a particular location.



Click on the **Add Discrepancy Report** button to display the *Location Discrepancy Audit* form.



Select a location to display the Location Discrepancy Audit report.



Select all items to that are *Confirmed*. You can select individual items, or all items at once. If all items are *Confirmed*, click the **Select All** box on the top left to check all items listed. To add an item to the list, enter the **System ID** in the **Additional Items** text field and click **Add Additional Item**. If the **System ID** entered does not exist, you will receive a message stating it could not be found.

Click the **Save Audit** button, then click **Finalize** to save the report to the **Location Discrepancy Audit Reports** tab.



Using the icons in the *Action* column you can view, edit or delete reports. If an icon does not appear, then you do not have permissions to perform that action. For example, if the edit icon does not appear next to a particular report then you cannot edit that report.

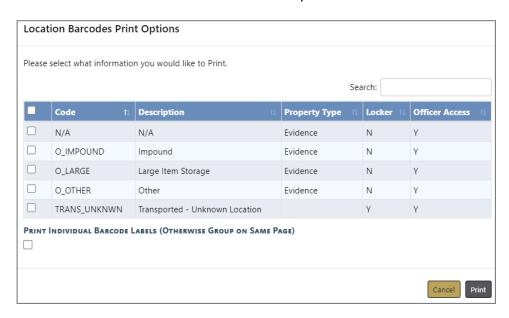
### **Property Locations**

The Evidence Custodian with the *Evidence Locations - Manage Evidence Locations* permissions can use this link to produce a location barcode report and manage evidence/held property locations.

Click on the **Property Locations** link on the **Evidence/Property Management** page to open the *Evidence - Held Property Locations*.



Click the **Print Location Barcodes** button to print location barcode labels.



- 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.

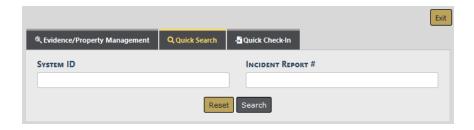
Click the **Add Evidence/Held Property Locations** button to open the *Add Evidence-Held Property Location* window to add another location record.



- Complete the fields.
- Click Save.

#### Quick Search Tab

This option works the same way as the **Evidence - Held Property Search**. The process, however, is shortened by using a scanner and barcode system.



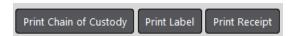
### **Quick Check-In Tab**

This option works the same way the **Check-In** link works. The process, however, is shortened by using a scanner and barcode system.



# Print Labels, Chain of Custody, Receipts

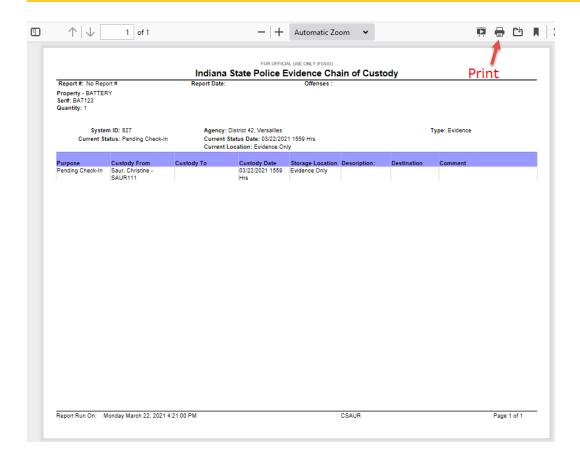
The **Evidence/Property Management Module** provides the ability to print the chain of custody, label, or receipt by clicking on the respective button when available:



For more information on the Evidence/Property Management Module, refer to "Evidence/Property Mgmt Module Overview" on page 481.

## **Print Chain of Custody**

Click on the Chain of Custody button to open the chain of custody in a new tab in the browser.

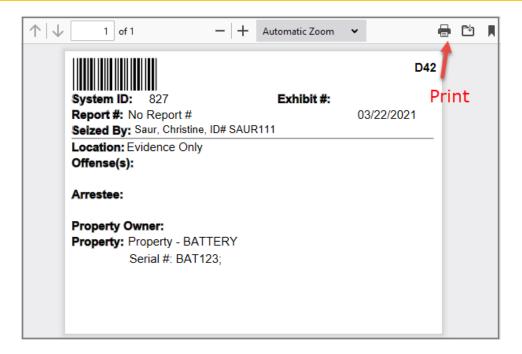


Your agency administrator has the option to apply a maintenance value setting to control whether or not chain of custody prints in ascending order by default. Refer to your agency administrator for details.

Click the print icon to print to the printer or save to a file.

#### **Print Label**

Click on the **Print Label** button to open the label in a new tab in the browser.



Click the print icon to print to the printer or save to a file.

## **Print Receipt**

Click on the **Print Receipt** button to open the receipt in a new tab in the browser.



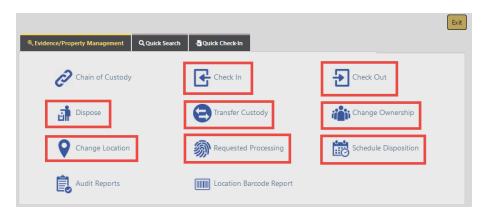
Click the print icon to print to the printer or save to a file.

# Chapter 24. Barcode Search Process

### Barcode Search Process Overview

The **Barcode Search** feature allows you to input multiple items into the **Evidence/Property Management Module** automatically by scanning the barcode label through the Property Management menu.

Access the scanning process through applicable links on the *Property Management* menu. For instructions on accessing the *Evidence/Property Management* menu, refer to "Evidence/Property Mgmt Access" on page 483.



Click on one of the links to open the respective *Search* screen, then click on the **Barcode Search** button on the top right.



Click the **Start Scanning** link to start the process of scanning each label. As each label is scanned there will be a beep from the system and a listing of the item will appear on the screen in the grid. You can delete a particular item if needed.



When you are finished scanning, click the **Stop Scanning** icon and select the **Continue** button.



The system then continues to function as described in the "Evidence/Property Mgmt Access" on page 483 section.

Click **Save** to save your changes and remain on the page.

Click Save & Exit to save your changes and exit the page.

### **Location Barcode Report**

This link allows the Evidence Custodian to print a report showing the evidence and held property locations in the evidence room, along with a corresponding **Barcode**. This allows agencies to scan the location with a barcode scanner rather than select it from the **List of Values** (LOV).

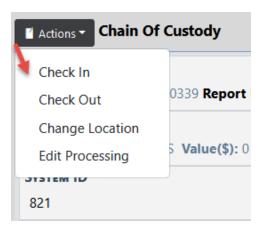
### Mega Menu

When viewing the Chain of Custody for any piece of evidence or held property, there is a **Mega Menu** to the top left. Evidence Custodians can use this menu to take action and change the **Status** of the item without leaving the window. The *Actions* available will be shown based on the **Current Status** of the evidence or held property.



Click on the **Mega Menu** button to display a drop-down of items from which to choose.

Choices available under the **Mega Menu** vary depending on the evidence **Current Status**.

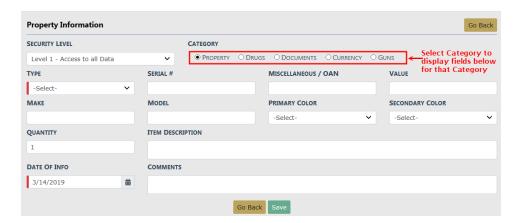


### Create Evidence or Held Property without An Incident Report

Officers can create property and indicate that the property is also evidence or held property without creating an incident report with appropriate permissions. This functionality is not a part of the default setup but can be requested by an agency administrator if desired.

To create evidence or held property without an incident report, the officer navigates to **Master Indices**, selects the *Property Tab*, then clicks the **Add Property** hyperlink. For information on accessing **Master Indices**, refer to "Master Indices" on page 81.

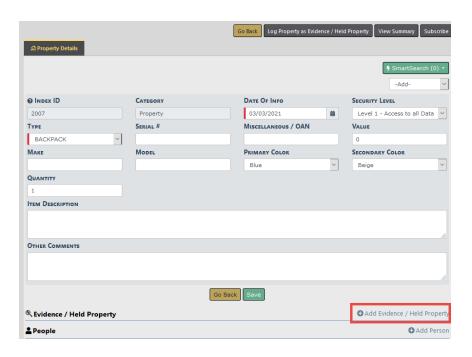
Click the **Category** to display additional fields specific to that Category to describe the property in more detail.



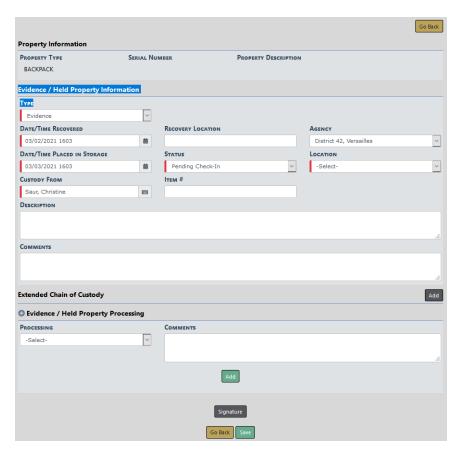
When all required information and as much other information as possible has been entered, click the **Save** button to add the property to the report.

The **Edit Property** screen appears. Click the **Add Evidence/Held Property** hyperlink in the Evidence/Held Property grid to add the property.

**Note:** To see this link, you must have the *Master Indices - Add Evidence to Master Index Property* permission. Refer to your agency administrator for details.



The standard **Evidence - Held Property** screen appears.



Select the **Type** (Evidence or Held Property), **Location** and enter other necessary information.

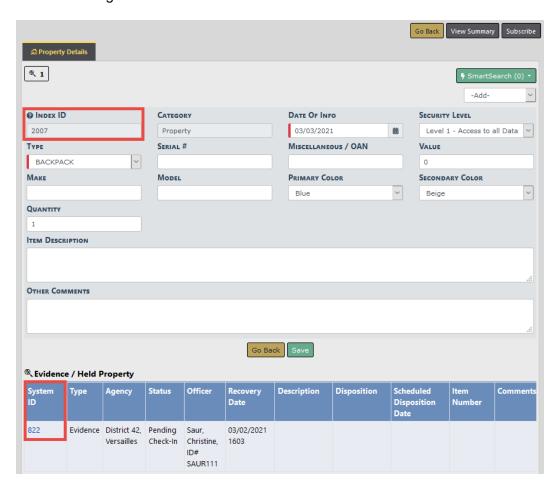
Optionally, click **Signature** to add a signature.

Optionally, click **Add** to add an *Extended Chain of Custody* and supply information in the fields that appear.

Optionally, select a **Processing** option from the drop-down list and enter comments.

**Note:** With Online RMS version 11.6 and above, your agency administrator has the option to set the *Evidence\_Processing\_Required* maintenance value to **Y** to require at least one processing record when adding evidence/held property records.

The **Edit Property** screen opens. The Property record now has an **Index ID** and **System ID** for tracking.

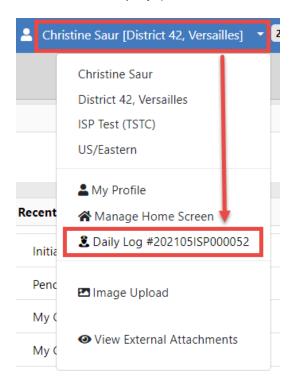


# **Chapter 25.Officer Daily Log**

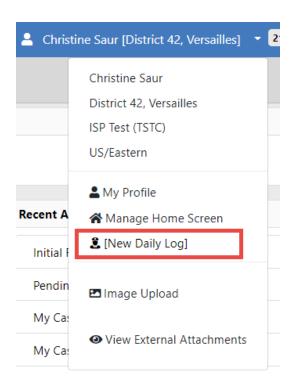
# Officer Daily Log (ODL) Overview

The **Daily Log** summarizes the officer's activities during their shift, such as assignments, issued equipment, report assignments and filings, and other activities. The officer can enter data as needed, and specific actions, such as creating incident reports, are automatically captured in the log by the system.

As an officer, you can access your existing current log from the *Home Page* by clicking on your user name in the upper right corner, then click **Daily Log** (notice the current log number also displays).



If a Daily Log has not yet been created, a **[New Daily Log]** option appears on the menu instead of the exiting Daily Log that contains a number. Click on **[New Daily Log]** to create.



**Note:** For instructions on creating a new Daily Log, refer to "Create New Log" on the facing page.

Note: Once closed, the Officer Daily Logs are maintained in Records Management. Before a supervisor posts an officer's log, it can be viewed, edited or deleted by the owner of the log. After Supervisors post the logs, the log can be viewed as needed under Records Management. A supervisor can un-post a log using the Un-Post feature to allow log corrections or modifications.

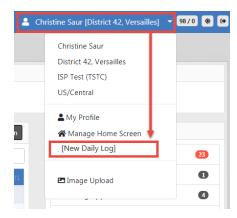
#### There are two tabs in the Officer Daily Log:

- Assignment Information
- Activity Log



# **Create New Log**

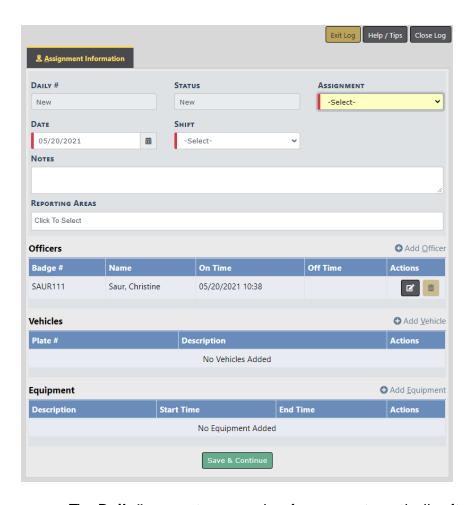
You can create a new Daily Log from the *Home* page by clicking on your user name in the upper right corner, then click **New Daily Log**.



A *Shift Start Time* window opens, defaulting to the current date and time. Change the date and time if needed, then click **OK**.



An Assignment Information form appears. Enter the appropriate information in the fields provided.

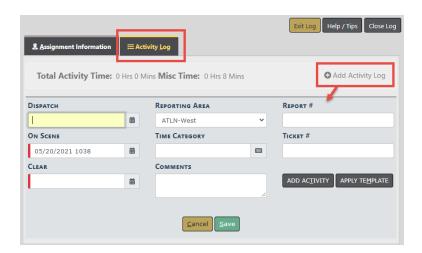


- The **Daily#** generates a number for you systematically after saving the form.
- The Status defaults to New.
- Select Assignment and Shift from the drop-down lists.
- Enter any Notes and select the Reporting Area.
- Complete the Officers, Vehicles, Equipment sections as needed.

**Note**: For more information on *Assignment Information*, refer to <u>AssignmentTab.htm</u>.

#### Click Save & Continue.

An Activity Log tab opens. Click Add Activity Log to create an entry.



Enter data into the fields provided then click Save.

**Note**: For more information on the *Activity Log*, refer to "Activity Log Tab" on page 531.

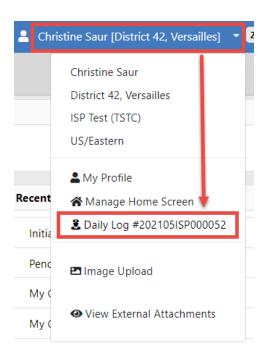
To exit the log and come back to it later, click **Exit Log**, or to close and submit the log for supervisor review, click **Close Log**.

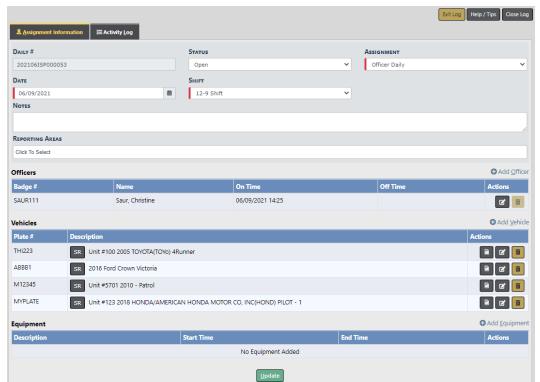


**Note**: For more information on exiting and closing the log, refer to "Close or Exit the Daily Log" on page 537.

# **Access Existing Log**

To access your own current log throughout the day, click on your user name on the *Home* page, then click **Daily Log**.



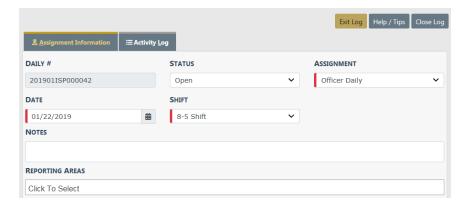


With appropriate permissions, you can add an existing custom Form to the fleet vehicle, edit the fleet vehicle and a vehicle service request service.

**Note**: For more information on accessing your current log, refer to "Officer Daily Log (ODL) Overview" on page 521.

# **Assignment Tab**

The Officer Daily Log defaults to the **Assignment Information** tab. Complete the top portion of the *Assignment Information*.



Complete the Officers, Vehicles, and Equipment sections as needed.

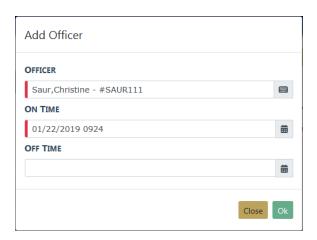
For more information on Officers, refer to "Officers" below.

For more information on Vehicles and Equipment, refer to "Vehicle & Equipment" on the next page.

#### **Officers**

There may be times an additional officer needs to be added to the **ODL**. To do this, select **Add Officer** under the *Officers* section.





Start typing the officer's name/User ID in the Officer field to display a list of officers from which you can select.

If you need to select a different *On Time* you may use the Calendar tool to select a different date/time than the default.

Click **OK** and the Officer's information is added to the Officers grid.

Use the **Edit** or **Delete** icons to the right in the appropriate row of the grid/table to make changes as needed to your log.

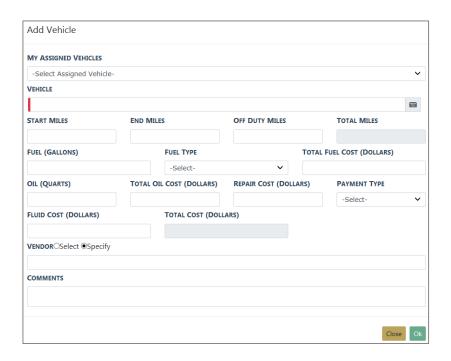
**Note**: Agency specific values can be administered by an Agency Administrator under *Manage Agency*, and the **Officer Daily Log** tables under the *Agency Settings* tab.

**Note**: Additional officers added to the **Daily Log** must be added manually to the *Assignment* within **Fleet Management**. Refer to "Edit Vehicles" on page 688 for more information.

## Vehicle & Equipment

If the vehicle to which you are assigned does not auto-generate into the **ODL**, you will need to **Add** the vehicle.





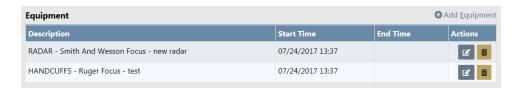
Click the **My Assigned Vehicles** field and choose a vehicle from the drop-down list. The **Vehicle** field will populate automatically. Or, you can add your own **Vehicle** by begin typing the **Unit** # or **Plate** # into the Vehicle field, then select the correct vehicle from the list that appears. It will auto-generate the **Start Miles** for you based on the previous users/your end miles. Select **OK**.

Select the **SR** button to create a new **Service Request** for the assigned vehicle. Refer to "Service Request" on the next page for more information.



Click the icon, if available, to quickly add a custom form to the fleet vehicle.

You may also Add, Edit or Delete equipment assigned to you.



**Note**: If any Vehicles or Equipment have been taken out-of-service by an Agency Administrator prior to you closing your **ODL**, you will not be able to close your **ODL** unless the Vehicle and/or Equipment is put

back in service. This is why it is important to make sure you close your **ODL** after your shift is complete.

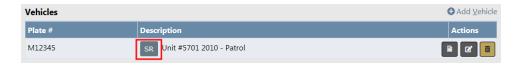
Select the **Update** button on the bottom of the page to save your work.

With permissions you can select the custom form button to add a custom form to the vehicle.

For more information, refer to "Add Custom Forms to Fleet Vehicle and Assignments" on page 681.

## Service Request

Select the **SR** button to create a new **Service Request** for the assigned vehicle, if applicable.



Select the **Request Type** from the drop down list, enter a description of what is needed, then click **Save**.



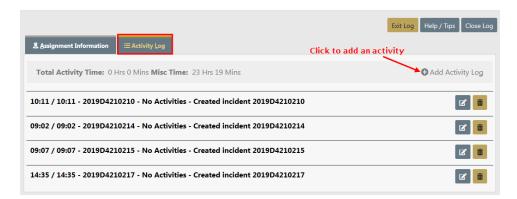
**Note**: The **Requesting Officer** defaults to the officer and the Status defaults to Pending.

A successful confirmation message briefly appears across the top of the window.

**Note**: Officers must edit **Services Requests** via the *Heet Management* module. Refer to "Edit a Service Request" on page 701 for more information.

# **Activity Log Tab**

Click on the Activity Log tab to manage activity. You can add, edit, or delete records.



## **Add Activity Log**

Click the Add Activity Log link to add a new record.

**Dispatch**: Use the calendar tool to enter the dispatch date, and then type in the time you were dispatched to the scene. This may be auto-generated from CAD from the Dispatch Center.

**On Scene**: Current date is entered by the system, but you must enter the time you arrived on scene.

Clear: You must enter a date and time in these fields to save and/or continue.

**Time Category**: Start typing in this auto-complete field and the system displays a list of similar entries. Select the appropriate entry.

**Comments**: Type text in the text field. You can enter whatever information you want to include here, OR click **Apply Template** to copy standard text that has already been entered for you in a template.

**Note**: Administrators set up and maintain activity codes and templates in the *Tables* module. Administrators can refer to the *Tables* chapter in the RMS Administrator Guide for more information.

**Report #**: If applicable, enter a **Report Number**. If you completed an incident report as a part of this activity, you would enter the incident report number here.

**Ticket #**: If applicable, enter a **Ticket Number**. During the course of a traffic stop, you might issue a ticket or Citation. If so, you would record the ticket/Citation number here.

When all applicable fields are complete, select **Save** to save the record.

Continue working as follows:

Select Add Activity Log to enter another activity in the log.

### **Edit Activity Log**

Select **Edit** to the far right of a log entry to open it and make any changes.

## **Delete Activity Log**

Select **Delete** to the far right of the log entry to completely remove the entry.

#### Switch to Edit Status

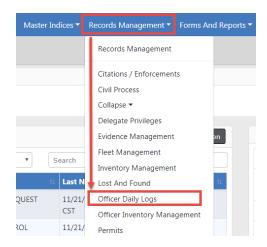
At this point you may choose to **Switch to Edit Status** if you have discovered something that would need editing.

**Note**: For more information on switching to edit status, refer to "Switch to Edit Status" on page 540.

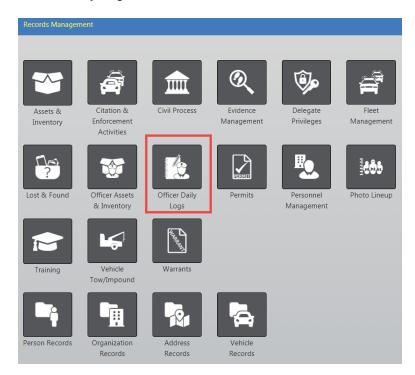
# Log Search

Use the following procedures to search Officer Daily Logs:

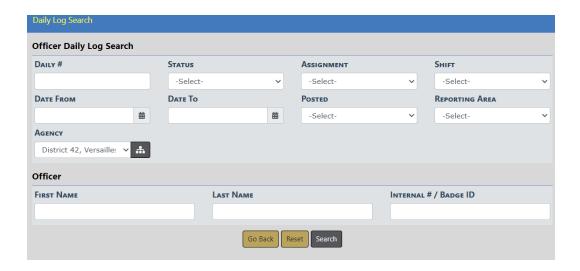
Select Records Management from the top menu, then select Officer Daily Logs.



Or, select Records Management to open the Records Management menu, then select Officer Daily Logs.



Whichever method you choose, the Search Daily Logs screen appears.



Enter the search criteria into the available fields or leave blank to return all records.

Note: Do not leave the *Agency* field blank. You may search for ODL records in the agency or any agency within the organization. Pick from the agency LOV or click on the Agency Structure icon 

to display and select an agency.

Select **Search** to display the *Daily Logs Search Results* page with a list of search results.



**Note:** If needed, select **Refine Search** to narrow the search results by adding more parameters, or click **New Search** to start over with a new search.

The Posted column remains blank when there is an *Open* or *Gosed* status.

The Status column displays the current status of the log, such as Open, Edit, Closed.

Select the View icon to view a report.

Select the Edit icon to edit a log.

Select the delete icon in to delete a log.

# Post and Un-post Logs

**Note:** Only supervisors with the proper role assignment can post and unpost daily logs.

Use the search feature to display a list of logs from which to choose. Refer to "Log Search" on page 533 for instructions on searching.

## **Post Logs**

There are two ways to Post logs:

- Select and post one or more logs from the search results window.
- Post a log you are currently viewing.

#### Post Logs from Search Results

Search for a group of logs to post. For more information on searching logs, refer to "Log Search" on page 533.

In the Search Results window there is a box under the *Posted* column, next to the Logs that have not yet posted. Select each log you wish to post, then click the **Post Selected Logs** button. For your convenience, there is a button on the bottom and on the top right.



The selected logs are now Posted.

#### Post Log Currently Viewing

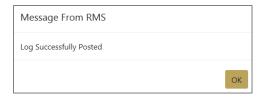
Search for the daily log you want to post. For more information on searching logs, refer to "Log Search" on page 533.

In the Daily Log Search Results window, click the View icon in the Actions column of the log you want to post to display the View Daily Log page.

On the View Officer Daily Log window select the Post button.



A Successful dialog box displays. Select **OK**.



The log is now **Posted**.

## **Un-Post Log**

There may be times when a Daily Log needs to be un-posted. Perhaps one was posted by mistake, for example.

Use the *Officer Daily Logs Search* to find that specific log, defining your search parameters as specific as possible. Refer to "Log Search" on page 533 for instructions on searching.

In the Results window, click the view icon in the *Actions* column of the log you want to un-post and it will display the *View Daily Log* page.

On the View Daily Log page, select Un-Post.



A Successful dialog box displays. Select OK.



The log can now be edited by the officer who created it.

## **Print Report**

Daily Log Reports can be printed, saved to a file on your computer, or both.

Use the search feature to view the log you wish to print. Refer to "Log Search" on page 533 for instructions.

After you have searched and selected the Log you wish to print, click on the **Print Report** button on the *View Log* screen.



A PDF document opens in a new tab in your browser. Print directly to the printer or save the PDF document giving it a custom filename.

**Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.

## Close or Exit the Daily Log

You have the option to exit or close the ODL. There is a difference between the two.



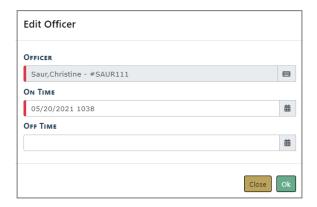
## Close the Daily Log

The last button at the top of the **ODL** is the **Close Log** button. Use this button to close your log at the end of the day/shift and make it available to your supervisor for review and posting. Once you select this option, you will not be able to edit the log.



Click **Yes** to begin the close process, or click **No** to return to the *Activity Log* tab.

If you clicked Yes, an Edit Officer window appears.



Select the Off Time for EACH officer that is on the ODL. Select OK.

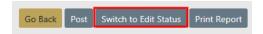
If the log has vehicles or equipment, a separate window displays allowing you to select the **Ending Mileage** for the vehicle and any other appropriate fields. Once those fields are complete, select **OK**.

A separate window displays for the equipment, if any. Apply the necessary data, then select **OK**.

The View Officer Daily Log window displays, showing a status of Closed.



If you have discovered you need to make a correction to the Daily Log, click on the **Switch to Edit Status** button.

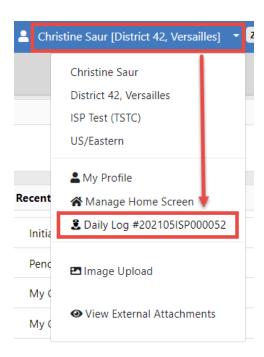


**Note:** For more information on switching to edit status, refer to "Switch to Edit Status" on the next page.

## **Exit the Daily Log**

The first button on the top of the **ODL** is the **Exit Log** button. Use this button to exit your log but not close it.

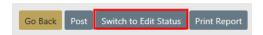
You can return to your active log at any time by selecting the **ODL** that is active. For more information on accessing your current active log, refer to "Officer Daily Log (ODL) Overview" on page 521.



## Switch to Edit Status

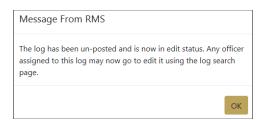
You can Switch to Edit Status if you have discovered a Daily Log needs editing.

If you have just closed the log, a **Switch to Edit Status** button appears near the top right of the form. If you closed the log earlier, then you need to search for and select the Daily Log to see the button.



For more information on searching for a Daily Log, refer to "Log Search" on page 533.

When you select the **Switch to Edit Status** button an un-posted confirmation message appears.

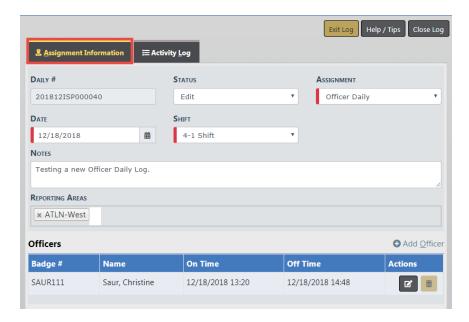


Select OK.

Select **Go Back** to display the *Officer Daily Log Search Results*. The Posted status has been removed and the Status now displays Edit.



Select the Edit icon in the results window to open the log in edit mode.



Make the necessary updates, then select **Close Log** to close the log. You have to complete the same steps that you completed when you initially closed the log. The status is now **Closed**.

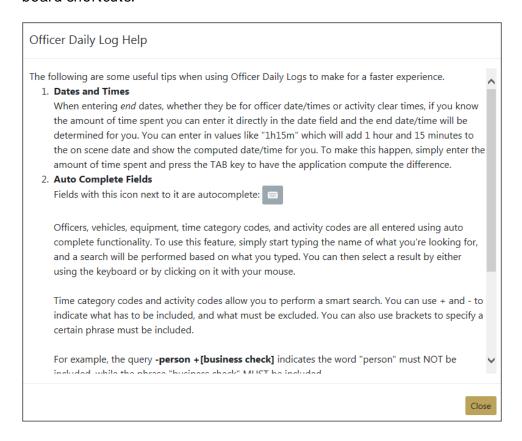
For more information on the Assignment Information tab, refer to "Assignment Tab" on page 527.

For more information on the Activity Log tab, refer to "Activity Log Tab" on page 531.

For more information on closing the daily log, refer to "Close or Exit the Daily Log" on page 537.

# **Help and Tips**

For Help with the Officer Daily Logs, Select the **Help/Tips** button. This window will display information about entering dates and times, using auto-complete fields and keyboard shortcuts.



Click Close to close the window.

# Chapter 26. Citations Enforcement

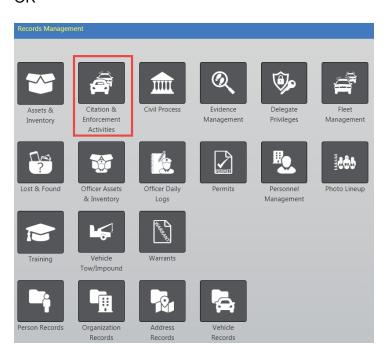
## Citations/Enforcement Overview

This module is a collection of Citation/Enforcement activities against persons, businesses, and/or vehicles. These activities can be related to Incident Reports, other Citation/Enforcement Activities, and other defined report types.

To access Citation/Enforcement records, select the Citations/Enforcements option from the Records Management drop-down menu or select the Citation/Enforcement **Activities** Icon/link from the *Records Management* main page.

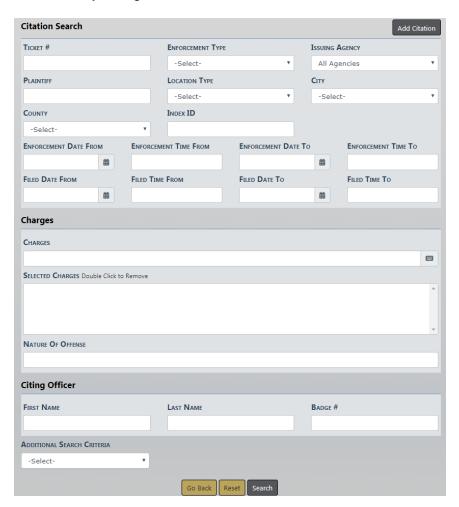


#### OR



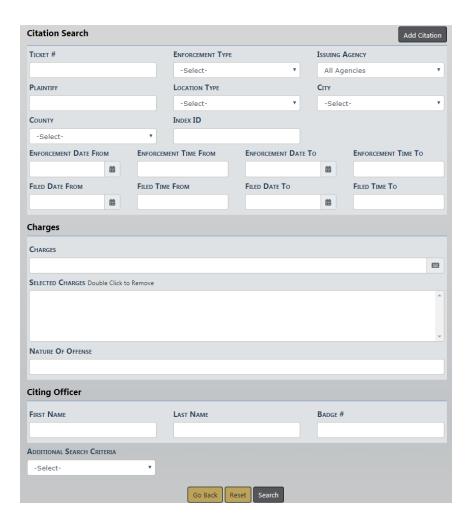
After selecting one of the above options, the **Citation Search** page opens. You can either search for an existing citation by entering search criteria into the available field then click **Search**, or click the **Add Citation** button to add a new citation.

**Note**: Checking the box for Citations Without Charges will filter results for citations that do not have any charge information entered.

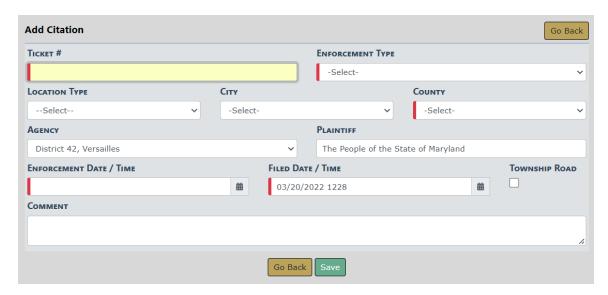


#### Add a New Citation

1. To Add a new Citation, select the Add Citation/Enforcement link on the Citation/Enforcement Activity page to display the Citation Search page.



2. Click the Add Citation button on the top right to display the Add Citation page.

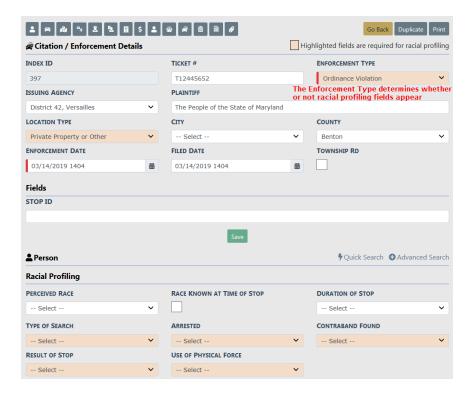


3. Add the necessary information then click Save.

4. An Officer Question window displays.

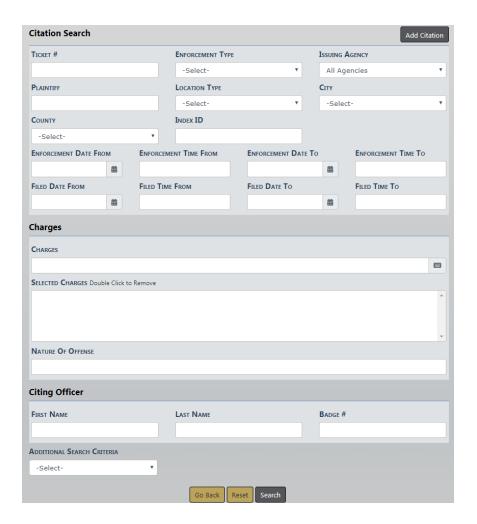


- 5. Select **Yes** to add you to the **Citation** as the officer automatically, or **No** to manually add the officer.
- **6.** Enter the necessary information on the **Edit Citation/Enforcement Details** page. For detailed instructions see "Enter or Update Citation Details" on page 551.



#### **Edit Citation**

1. Complete the necessary fields on the **Citation/Enforcement Activities** page to search for the **Citation** you want to **Edit**.



The **Nature of Offense** field is free text that allows you to enter additional charging information not contained in the Charge Code LOV. For agencies having an interface that imports citation data into Online RMS from an *eOtation System*, the **Nature of Offense** field contains charging descriptions as entered in the *eOtation System* when a charge code does not exist in Online RMS.

The **Additional Search Criteria** allows you to include information from a specific section, if needed. Additional search fields appear if you choose one of the available options from the list.



**Note**: *Qustom Fields* is available for agencies that have the *Qustom Fields* feature enabled. *Qustom Fields* captures data defined by the agency. For more information refer to your administrator.

2. Click the **Search** button to display the **Search Citations** results grid with a list of records matching the search criteria.



You have the ability to export the search results to various file types such as, PDF, MS Excel, CSV, and XML using icons above the IndexID on the Search Results grid. For more information refer to "Export Search Results" on page 35.

Click the **Add Citation** button to add a new citation. For more information on adding a new citation refer to "Add a New Citation" on page 544.

Your assigned roles determine which actions are available to you from the *Actions* column, located on the right. If an icon does not appear in the Action column then you do not have the ability to perform that action.

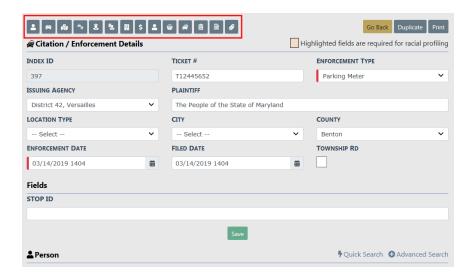
For example, if the **Delete** icon does not appear in the *Action* column, then you do not have the ability to delete that item.

- The **View** icon allows you to view a snapshot of the record listed. For more information on viewing Citations refer to "View Citation" on the facing page.
- The **Edit** icon allows you to open and edit the record listed.
- The **Delete** icon allows you to delete the record listed. For details on deleting Citations refer to "Delete Citation" on page 558.

Click **Refine Search** or **New Search** to return to the **Citation Search** page, where you can redefine your search, start a new search (click **Reset** to clear all fields), or **Go Back** to return to the previous page.

3. Click the Edit icon to open the Edit Citation/Enforcement Details page.

There are several sections that make up this page. Each available section is listed in the **Go To** area at the top of the page as a link. Select any link to go directly to the corresponding section or scroll down the page to each section.



Click on the **Duplicate** button to create another **Citation** identical to the one you are on. For more information refer to "Duplicate Citation" on page 557.

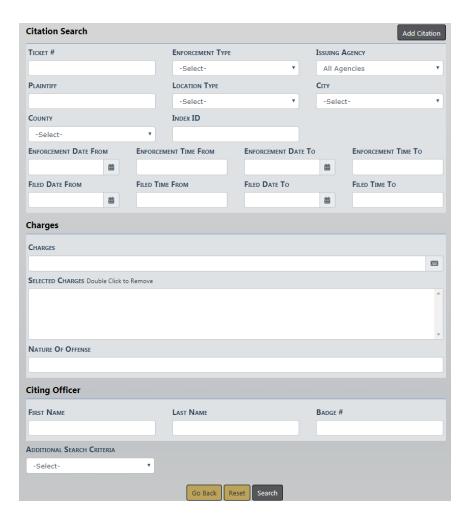
Click on the **Print** button to print the **Citation**. For more information refer to "Print Citation" on page 559.

4. Complete all applicable sections. For detailed instructions see "Enter or Update Citation Details" on page 551.

#### **View Citation**

Caliber Public Safety

1. Complete the necessary fields on the Citation Search page to search for the Citation you want to View.



2. Click the **Search** button to display the **Search Citations** results grid with a list of records matching the search criteria.



- 3. Click the View icon to open the Citation/Enforcement Details page.
- 4. Click on the **Go Back** button to return to the search results, or click on the **Print** button to print the **Citation**. For more information refer to "Print Citation" on page 559.

# **Enter or Update Citation Details**

Whether you are creating a new **Citation** or updating one that already exists, the process of entering the details is fundamentally the same.

Citation data is grouped into various sections: enforcement details, persons, vehicles, locations, violations, officers, related reports, file attachments, etc. Each section contains information unique to that section. For example, Bond Type is located only under the Bond section of the Citation.

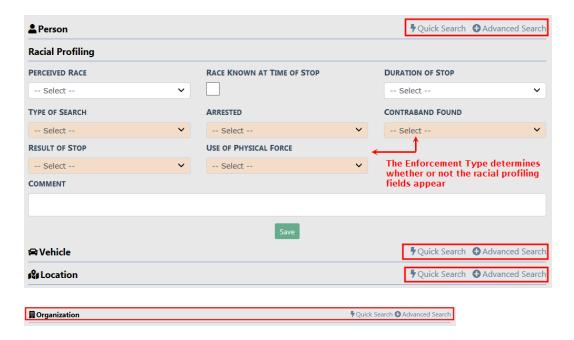
The **Citation** module utilizes *Master Indices*. *Master Indices* are centralized pieces of data that are accessed from different modules of the system for consistency. Each index is represented only once, such as a person, an address, a vehicle, a location, and the organization.

**Note**: For more information on *Master Indices* refer to "Master Indices" on page 81.

Sections containing **Quick Search** and **Advanced Search** links utilize the *Master Index*. You must first search the *Master Index* to determine whether or not this data already exists before adding or updating. If the record exists, you must use it in the **Citation**. If the record doesn't exist, then you can create it, providing you have the proper permissions. For more information on permissions see your administrator.

Click the **Save** button in each section to save the entered data. Whenever you save, a flashing notification at the top of the page indicates that the data has been added.

# Person, Vehicle, Location, Organization

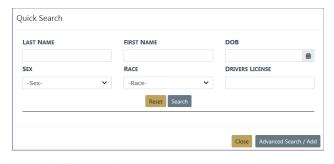


There are two types of searches:

#### Quick Search

 Limited Master Index search. For example, for person you can only search by last name, first name, DOB, sex, race, and driver's license number.

#### Person Example



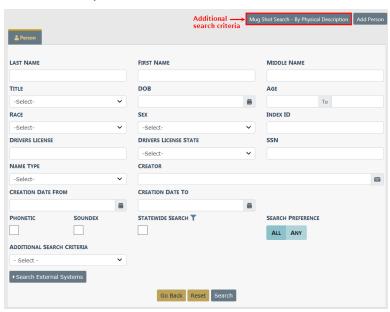
#### Vehicle Example



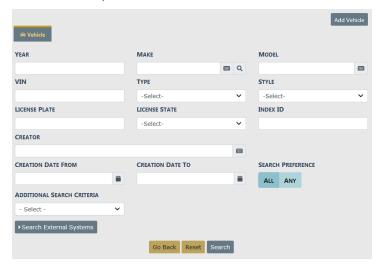
#### **Advanced Search**

- Extensive Master Index search. For example, in addition to the Quick Search criteria for person, you can also search by age, middle name, physical features, age range, and more.
- This feature also allows you to add new Master Index records if they don't already exist, providing you have the proper permissions. See your administrator for more information.

#### Person Example



### Vehicle Example



## **Racial Profiling**

The **Enforcement Type** determines whether or not the Racial Profiling fields appear. For example, the fields appear when *Ordinance Violation* is chosen, but not for *Parking Meter*.

Select an option from the drop-down menu in each field of the **Racial Profiling** section. Click the **Race Known At Time of Stop** button if it is a true statement; green represents true and gray represents false.

### **Violations and Charges**

For Violations, enter the **Posted Speed Limit** and **Actual Speed limit**, if applicable, and select one or multiple violation **Methods** from the drop-down list.

Click Save.

Click on the +Add Charge link to open the **Citation Charge** window. Begin typing the desired Charge Statute to view a list of similar charges then select the one you need from the list.

Select the **Class** and **Disposition**. These each contain a drop-down list in accordance with the **Charge Statute** selected.

Complete all other fields required by your Agency, then click Save.

**Note:** Multiple charges can be listed on one citation (according to your Agency). You must add additional items for each charge (Class, Disposition etc.).

Click **+Add Charge** to add additional charges, if applicable. Click **Save** after entering each **Charge**.

Click **Go Back** to return to the previous page.

#### **Bond**

To enter Bond information, select the **Bond Type** from the drop-down list, enter the **Bond Amount**, **Appearance Date**, and click the **Must Appear** button if the person

must appear; the button turns green when selected.

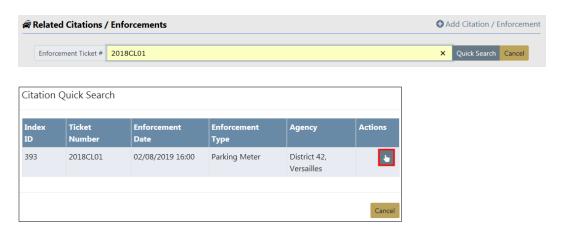
Click Save.

### **Associate Incident Reports**

You can associate Incident Reports to the Citation. Click on **+Add Incident Report** to open the Incident Search screen, search for the incident and select it. For more information on searching Incidents, refer to "View Incident Reports" on page 261.

#### **Relate Citations**

You can associate other citations with the current citation. Click **+Add Cit-ation/Enforcement**, enter the **Enforcement Ticket#** in the field provided, click **Quick Search**, then select the appropriate Citation from the results list.



# **Associate Other Related Reports**

You can associate other reports as defined by your agency. Click **+Add Report** to open the *Add Related Report* window, enter the **Report #**, select the **Report Type** from the drop-down list, enter necessary **Comments**, then click **Save**.



#### **Attached Forms**

If applicable to your agency, you can attach a custom form. Select an item from the **Add Form** drop-down list to open the chosen form. Complete the necessary fields, then click **Save** to remain on the form, or **Save And Exit** to save the form and return to the Citation. Click Cancel to return to the Citation without adding a custom form.



#### **Attachments**

You can add photos and documents to the Citation. Click on **+Add Attachment** to open the *Add Attachments* screen. For more information on Attachments, refer to "Attachments" on page 67.

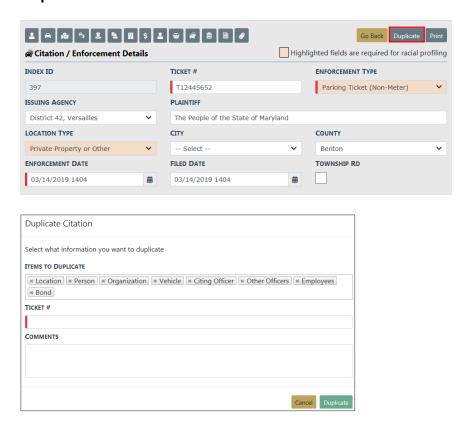
#### All Other Sections

Data entry in all other sections are fundamentally similar to adding Charges, but with different information.

# **Duplicate Citation**

In cases where two or more people are being cited for the same charge(s), it may be more efficient to create one ticket, duplicate it, and then edit the duplicate for another person. The process can be repeated as many times as needed.

1. After entering and saving the **Citation**, click the **Duplicate** button to open the **Duplicate Citation** window.



- 2. In Items To Duplicate, click on the x to remove items you do no want to duplicate, or click into the field to choose additional items from a drop-down list.
- 3. Enter the Ticket # for this Citation.
- 4. Enter any additional comments.
- 5. Click the **Duplicate** button at the bottom of the window to display the message prompt:

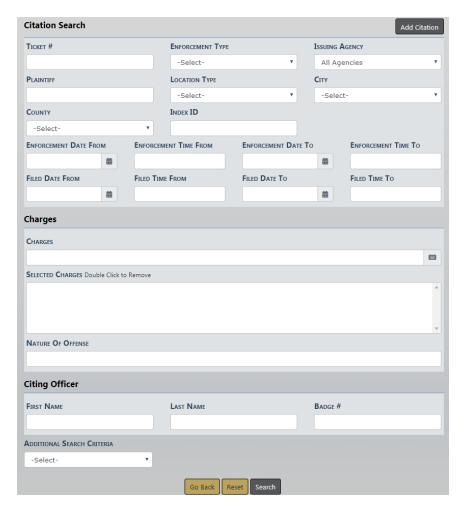


6. Click **Yes** to open the new citation in the **Edit Citation/Enforcement Details** page and edit it as needed. For more information on editing a citation refer to "Edit Citation" on page 546.

# **Delete Citation**

On rare occasions you may need to delete a **Citation**, if you have proper permissions to do so.

1. Complete the necessary fields on the **Citation Search** page to search for the **Citation** you want to **Delete**. For more information on searching for a Citation, refer to "Edit Citation" on page 546.

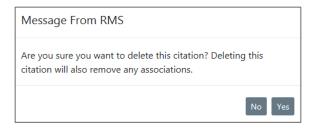


2. Click the **Search** button to display the **Search Results** page with a list of records matching the search criteria.



The **Delete** Icon in the *Actions* column allows you to **Delete** the record listed. If the delete icon does not display, then it is likely you do not have permissions to delete it. For more information on permissions refer to your administrator.

3. Click the **Delete** Icon on the record you want to delete. A confirmation window appears.



**4.** Click **Yes** to delete or click **No** to return to the search results without deleting. If you clicked **Yes**, a comment window appears.



5. Enter the reason for deleting the Citation then click **Delete**.

# **Print Citation**

You can print a citation you are viewing or editing.

For more information on editing a citation refer to "Edit Citation" on page 546.

For more information on viewing a citation refer to "View Citation" on page 549.

 Click the Print button while on the Edit Citation/Enforcement Activity page or the View Enforcement page.



A PDF document opens in a new tab in your browser. Print directly to the printer or save the PDF document giving it a custom filename.

**Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.

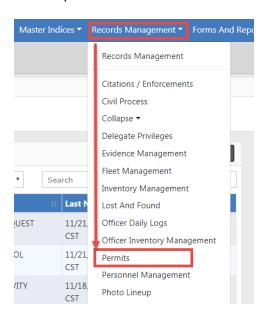
# Chapter 27. Permits

## **Permits Overview**

The **Permits** module allows you to view, create, or modify permit information. **Permits** include alcohol permits, bicycle licenses, burning permits, gun purchase permits, parking permits, etc. The type of permit is controlled by the Agency Administrator.

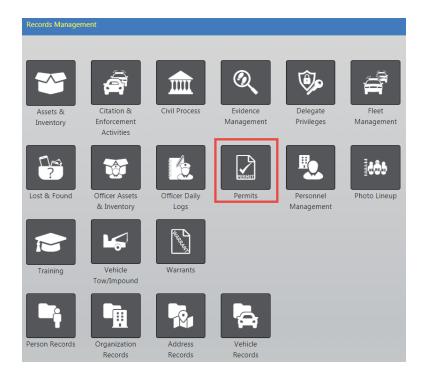
There are two ways to access the **Permit** module:

1. Click Records Management on the navigation bar, then click the **Permits** option from the drop-down menu.

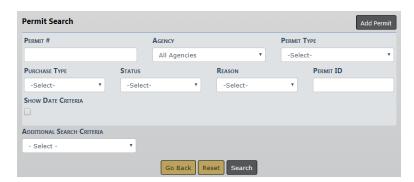


2. Or click Records Management on the navigation bar, click the Records Management option from the drop-down menu, then click the Permits Icon/link.





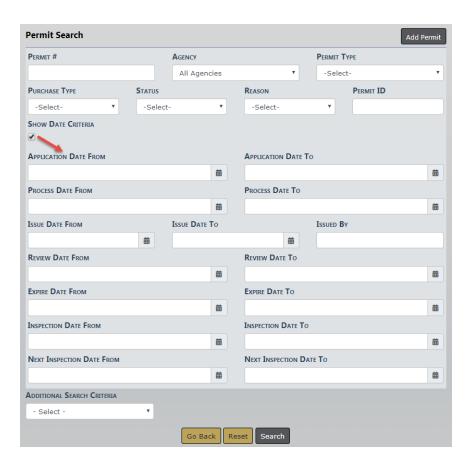
Either option opens the Permit Search page.



#### Search Permits

From the **Permit** page complete as many of the fields in the *Permit Search* section as you can.

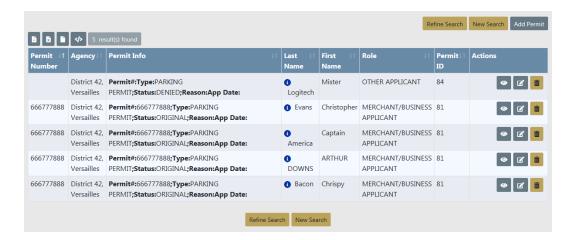
If applicable, click the **Show Date Criteria** button to open the *Date Criteria* section.



If applicable, select the down arrow next to **Additional Search Criteria** on the bottom left to open the drop-down list. Select the appropriate option to open another section where you can add information about People, Organization, Property, Vehicles, or Guns.



Enter your search criteria in the applicable search fields, then select **Search**. The *Permit Search Results* page displays all search results that meet the parameters of your search.



The lcons in the Actions column display based on our role.

Select to view a permit.

Select to open a permit for editing.

Select to delete a permit.

Several actions are available from the *Permit Search Results* page. These are indicated by four icons under the *Search Results* tab:

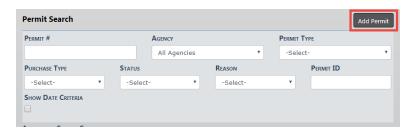


You can then export your search results into that type of document. The **Add Permit** button accesses the *Add Permits* page where you can add a new **Permit**.

#### **Add Permit**

There are two ways to access the **Add Permit** page:

• The **Add Permit** button on the *Permit Search* page.

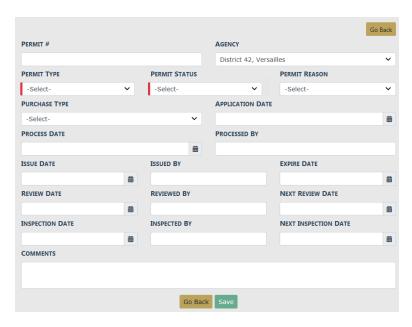


The Add Permit button on the Permit Search Results page.



For search details, refer to "Search Permits" on page 562.

Complete the Add Permit page.

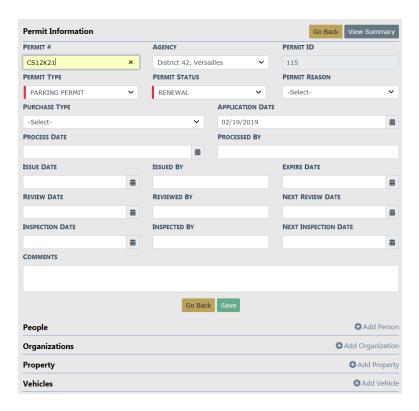


The only required fields for adding a permit are the **Permit Type** and **Status** fields, both of which have a drop-down list from which to select.

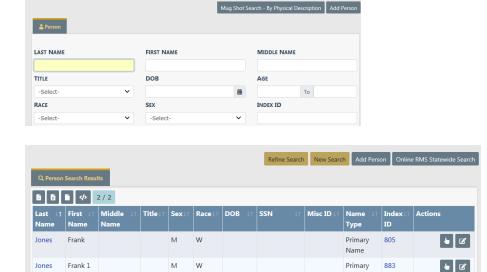
Once you have entered all the information, select **Save**, this will open the **Edit Permit** page.

#### **Edit Permit**

To edit a permit you either must have edit permissions, or you must add and save a new permit to open the **Edit Permit** page.



To add additional information to the permit such as, People, Organization, Property, Vehicle, Attachments you must select the appropriate **+Add** link. You will first search for the record; i.e. People.



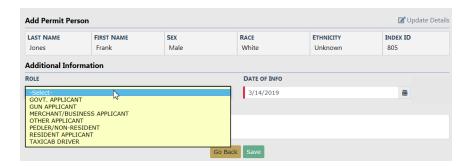
Use the under the Actions column to select the Person.

Refine Search New Search

Name

If there are no results found during your search, use the **Add Person** button. For more information on adding a person, refer to "Adding Person" on page 97 in the *Master Indices* module.

When you make a selection the Add Permit Person page opens.



The **Date Of Info** defaults to the current date. You must make a selection from the drop-down for the **Role**. After you have made your selection, select **Save**. It brings you back to the **Edit Permit** page.

Once you have added all the necessary information to the **Permit**, select the **View Summary** button to review your work on the *Permit Details* page.

If you need to add or change information in the **Permit**, do so then select **Update Details**.

If you need to go back to the previous page, select the **Go Back** button.

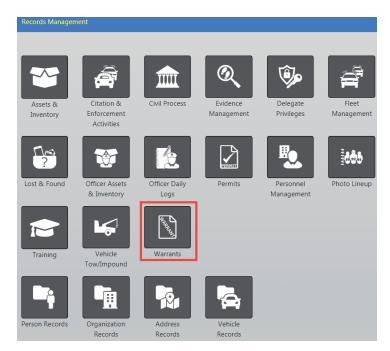
# Chapter 28. Warrants

## **Warrants Overview**

The **Warrants** module handles the workflow of warrants in the Online RMS system. Information entered in this module drives the process of creating, activating, serving, and/or recalling warrants. Warrant logs are maintained throughout the lifecycle of the warrant, as are notifications to users in the system regarding the **Warrant**.

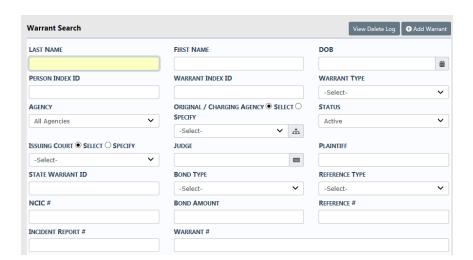
To access the **Warrants** module, select the **Warrants** option from the *Records Management* drop-down menu or select the **Warrants** lcon/link from the *Records Management* pages.

Or click Records Management on the navigation bar, click the Records Management option from the drop-down menu, then click the Warrants Icon/link.



You are initially brought to the **Warrant Search** page. Caliber Public Safety recommends that you always search for a **Warrant** prior to adding a new one.

6 December 2022 User Guide 569



You can view the warrant delete log, add a warrant, and view warrants on the map from the search results page. For more information on search warrants, refer to "Warrant Search" below.

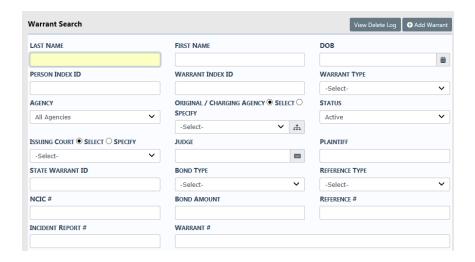
## Warrant Search

The **Warrant Search** page allows you to search for a group of warrants or a specific warrant. You can also *View Delete Log* and *Add Warrant* from this page by clicking on the respective links on the top right of the page.



For more information on deleting a warrant, refer to "Delete Warrant" on page 592.

For more information on adding a warrant, refer to "Add Warrant" on page 572.



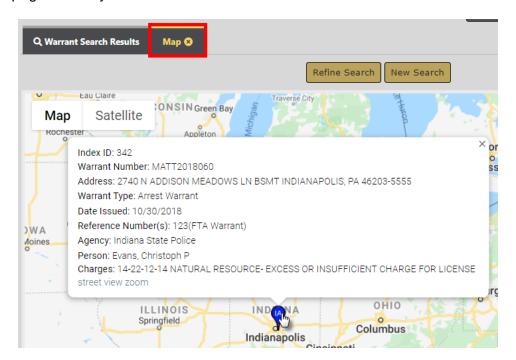
On the **Warrant Search** page, complete the fields necessary to produce the desired search results. For example, enter the last name *Evans* and first name *Christoph* to display records that match that criteria.

Enter information into the **Warrant Search** page then click **Search** or press the **Enter** key, click **Reset** to clear the entered search data to start the search over, or click **Go Back** to return to the previous screen without searching.

Warrants that meet the search parameters are listed. Icons that display in the *Actions* column depend on your assigned role.



Select the **Show Map** button on the top right of the search results window to open a new tab displaying the current search results on a map. The map appears for the currently displayed page. For example, while you are on page two of three, the map refers to page two only.



Only warrants with a service address that is GEO-coded display on the map.

A message stating "No service addresses are able to be mapped..." on the Maps tab when none of the Warrants in the search results have a GEO-coded service address.



 Click on any pin on the map to open a pop-up window containing warrant index id, warrant number, address, warrant type, issued date, reference numbers, agency, person, and charges.

Select the **Add Warrant** button to add a new warrant.

Select the **View** icon in the *Actions* column to view a warrant.

Select the **Edit** icon to update a warrant. For more information refer to "Edit Warrant" on page 577.

Select the **Delete** icon to delete a warrant. For more information refer to "Delete Warrant" on page 592.

**Note:** If there is one charge, then it appears in the Charge column; if multiple charges, an information bubble **1** appears. Hover over or click on the bubble for more information.

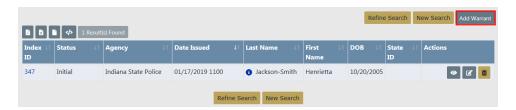
# **Add Warrant**

There are two ways to add a warrant from the **Warrant** module:

Select the Add Warrant link from the Warrants Search page



Select the Add Warrant button from the Warrant Search Results page.

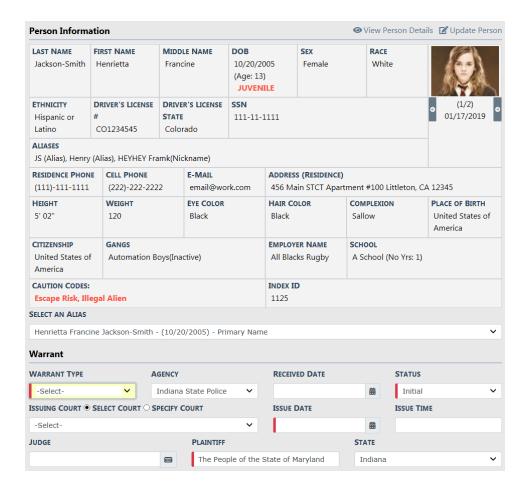


Either option will open the *Master Index Search* page. Enter the necessary criteria to search for the person for whom to apply the **Warrant**, click **Search**, then select the appropriate person record for the Warrant.

**Note**: If the person for whom you are searching does not exist, select the **Add Person** button on top of the *Search Results* page to add that person. Refer to "Adding Person" on page 97 for instructions. After you have added the person to the Master Index, you can then select the record to add a warrant for that person.

For more information on the Master Index, refer to "Master Indices" on page 81.

When you select the appropriate person record, the **Add Warrant** page opens. The person data populates from the *Master Person Index* record automatically.



You may View Person Summary data or Update Person Details by clicking on the links provided.

Complete all fields required by your Agency.

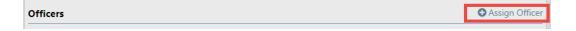
At least one Reference Number is required. Type the number in the field, choose the Reference Type and select the **Add** button. Add additional Reference Numbers and Types as needed.

Note: If configured, your agency may require a Judge on warrant creation.

Check Extraditable Offense box if extraditable, and enter an Extra Comment, if applicable.

Click **Save** to open the *Edit Warrant* page.

Page down and assign officers, if applicable.



Select **Assign Officer** to open the officer dialog box and grid. You can assign officers inside or outside your agency.



Select one **Agency Filter**. If you choose to filter by My Organization or All Agencies, a drop-down list appears of available agencies from which to choose.

#### Select one Officer Filter.

You can use the **Optional Search Text** fields filter by a specific officer name, badge number, or title.

Click the **Search** button to filter the results list based on all selections made above.

Select an officer from the list to open another dialog box with additional information.



Select the Assign Date if other than the default.

Enter **Comments**, if appropriate.

Check Notify User if you want to notify the user of the assignment.

Click **Save** to add the officer assignment to the Warrant.

Optionally, assign additional officers.

Add associated **Incidents** and **Calls For Service**, if applicable.



#### **Add Incident**

Select the **Add Incident** link to search for and select an existing incident to associate to the Warrant.

If the selected Incident has associated *Calls For Service*, a list of those Calls appear and you may choose whether or not to also associate the *Calls For Service* to the warrant.

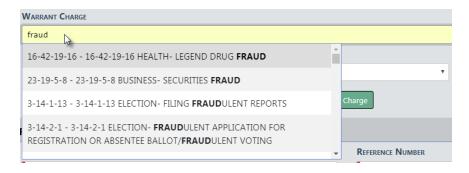
#### Add Call

Select the **Add Call** link to search for and select an existing Calls to associate to the Warrant.

Complete the *Warrant Charge* section. Select the **Charge Category** and **Charge Class**, then the **Warrant Charge**.

Within the Warrant Charge field, search for arrest charges and statutes by entering numbers or text to display a list from which to choose.

**Note**: The **Warrant Charge** displays a list based on data entered into the **Charge Category** and **Charge Class** fields.



Enter the Charging Agency section, if applicable.



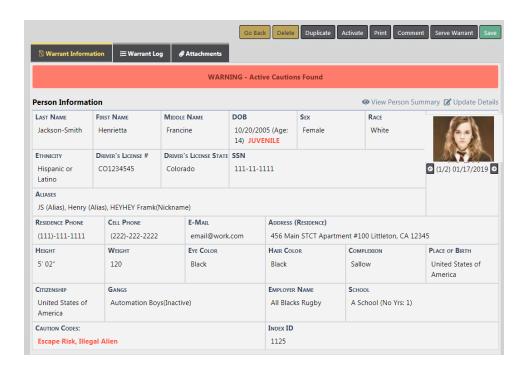
Enter all other applicable information.

Click Save to add the Warrant.

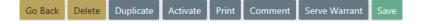
## **Edit Warrant**

From the Warrant Search Results page, select the Edit icon in the Actions column of the Warrant you want to edit. For more information on searching for a warrant, refer to "Warrant Search" on page 570.

The Edit Warrant page appears.



The Edit Warrant page contains up to eight action buttons on the top right of the window:



- Go Back returns to the previous page.
- **Delete** a warrant, refer to "Delete Warrant" on page 592.
- Duplicate a warrant, refer to "Duplicate Warrant" on page 582.
- Activate a warrant from initial status, refer to "Activate Warrant" on page 584.
- Print a warrant, refer to "Print Warrant Report" on page 592.
- Log a **Comment**, refer to "Warrant Log" on page 589.
- To Serve Warrant, refer to "Serve Warrant" on page 586.
- Save applies your updates to the database.

**Note**: The appearance of the action buttons are controlled by the warrant Status. For example, the Serve Warrant button does not appear when the warrant status is Served.

The Edit Warrant page contains three tabs:



- For information on the Warrant Information tab, refer to "Warrant Information Tab" below.
- For information on the Warrant Log tab, refer to "Warrant Log Tab" on page 581.
- For information on the Attachments tab, refer to "Attachments Tab" on page 582.

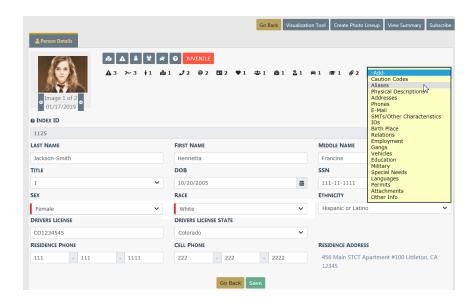
### **Warrant Information Tab**

The **Edit Warrant** window opens to the Warrant Information tab by default. For information on **Warrant Log** refer to "Warrant Log" on page 589, and for information on **Warrant Attachments** tab refer to "Warrant Attachments" on page 591.

#### Choose or Add Alias Name

Select the down arrow to the right of the **Select an Alias** field to choose another name from the drop down list. If there are no names to choose from and you need to add an Alias, select the **Update Details** link in the upper right corner to open the *Person Details* page.

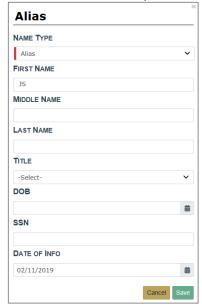




There are two ways to add an alias:

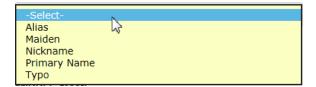
- Click into the Add field on the Person Detail window and select Aliases from the drop-down list.
- Or scroll down to the Aliases section of the Person Detail window and click Add Alias.

Either method will open the Alias window.



Complete the fields and select Save.

Click **Go Back** to return to the **Edit Warrant** window and page down to the **Select An Alias** section. The new Alias you entered now appears in the drop-down list.



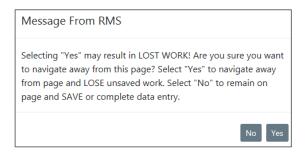
Page down on the *Edit Warrant* screen for other associated data, such as Service Addresses, Warrant Information, Incidents, Calls, Officers, Field Arrests, Charges, and Charging Agency information. You can view, update, add, or delete associated data if you have been given access to do so. For more information on the type of access that you have, see your administrator.

To add an associated record, click on the link that contains a + sign and a new window will open.

To return to the previous screen, select Go Back.

To add a comment about the warrant, select **Comment**.

If you have not selected **Save** and you have made some updates to the Warrant, an unsaved data warning message displays.



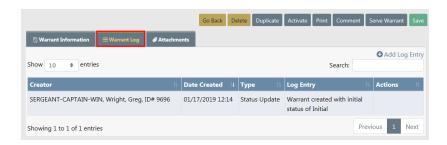
You may want to select **No**, select **Save** then continue with **Comment**.

The **Event Date** defaults to the current date and time. Enter any comments to the Warrant.

## Warrant Log Tab

Select **Warrant Log** to view or add comments. This is also where you can view the date/time of each action taken.

Refer to "Warrant Log" on page 589 for more information.



#### **Attachments Tab**



Refer to "Warrant Attachments" on page 591 for more information.

# **Duplicate Warrant**

Users with proper permissions can duplicate warrants. For more information on permissions, refer to your agency administrator.

From the Warrant Search Results page, select the Edit icon in the Actions column of the Warrant you want to delete. For more information on searching for a warrant, refer to "Warrant Search" on page 570.

The Edit Warrant page appears.



Click on the **Duplicate** button at the top of the page to select items to duplicate.



Click the **Add Original Person** button to add the person on the original warrant, or click **Add Person** to add a different person.

If you clicked **Add Person**, the person search window appears. Search for and select the person to add them to the duplicate warrant. Repeat as needed until all names have been added.

In addition to core warrant data, select the available options to duplicate.

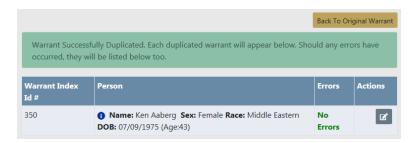


Click the **Duplicate** button to display a confirmation window.



Click **Yes** to duplicate, or click **No** to close the window without duplicating.

If you clicked **Yes**, a *Warrant Successfully Duplicated* window appears listing any errors that may have occurred.



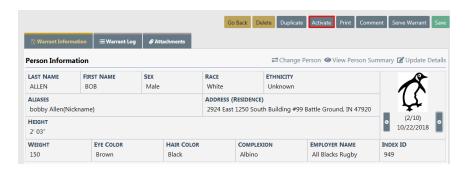
Click **Back to Original Warrant**, or click the edit icon in the actions column to edit the duplicated warrant.

### **Activate Warrant**

Users with proper permissions can activate warrants from an *Initial Status*. For more information on permissions, refer to your agency administrator.

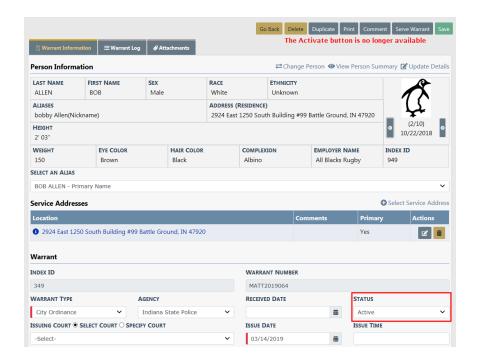
From the Warrant Search Results page, select the Edit icon icon in the Actions column of the Warrant you want to delete. For more information on searching for a warrant, refer to "Warrant Search" on page 570.

The Edit Warrant page appears. Click on the Activate button at the top of the page.



A Warrant Successfully Activated and Updated message briefly appears across the top of the page. The **Activate** button no longer appears at the top of the page, and the warrant **Status** changed from *Initial* to *Active*.

Caliber Public Safety Chapter 28. Warrants Online RMS11.11



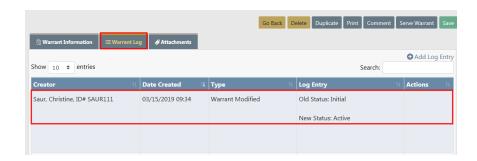
When the warrant status is *Active*, an automatic Caution Flag appears on the master person index record:



For more information on master index records, refer to "Master Indices Overview" on page 81.

**Note:** When the warrant **Status** changes from *Active*, the Caution Flag is removed from the master person index record automatically.

The change in status also posted to the Warrant Log. Click on the **Warrant Log** tab to view the entry. For more information about log entries, refer to "Warrant Log" on page 589.

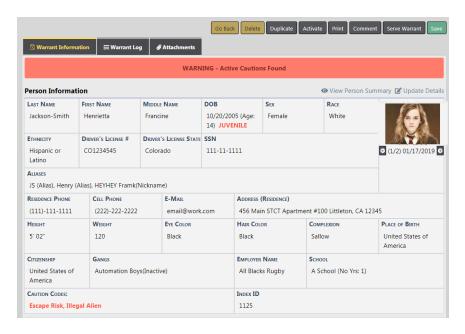


Apply other necessary updates to the warrant as needed, then click **Save**. For more information on editing the warrant, refer to "Edit Warrant" on page 577.

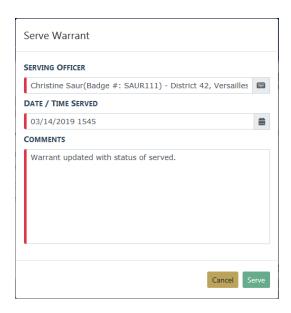
### Serve Warrant

From the Warrant Search Results page, select the Edit icon in the Actions column of the Warrant you want to edit. For more information on searching for a warrant, refer to "Warrant Search" on page 570.

The Edit Warrant page appears.



From the *Edit Warrant* page select the **Serve Warrant** button at the top right or bottom of the page to display the *Serve Warrant* page.



The **Date/Time Served** field defaults to the current date and time, and the **Comment** field defaults to *Warrant updated with status of served*. You can change these values as needed.

Once you have verified the information on the *Serve Warrant* page, select **Save** to save the record. The status of the Warrant is now *Served*.

When using Master Indices Person Search, there will be an red triangle icon to the left of the Last Name on the Person Search Results page when a person has an active Warrant.

**Note**: For more information on Master Indices, refer to "Master Indices" on page 81.



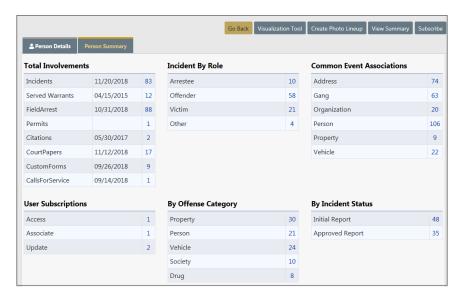
From the *Person Search Results* page select the Edit icon to open the *Edit Person* page. An *Active Warrants Found* message appears in red on the Person Details screen.

WARNING - Active Warrants Found

Click on the Active Warrants Found message to open the Person Summary tab to the **Involved Warrants** section that displays the active warrant in red.



**Note**: You can also go directly to the **Involved Warrants** section from the **Total Involvements** summary section at the *Person Summary* tab. Click on the number to the right of the Warrants line item.



Select the **Index ID** to the left of the *Active Warrant* to open the *View Warrant* screen.



Select the **Serve Warrant** button to open the *Serve Warrant* window.



Enter the **Serving Officer**. The **Date Served** fields default to the current date and time and the **Comments** field defaults to *Warrant updated with status of served*. You can change these values as needed.

Once you have verified the information on the *Serve Warrant* page, select **Save** to save the record, close it, and return to the Warrant Information section of the *Edit Warrant* page, where the status now shows **Served**.

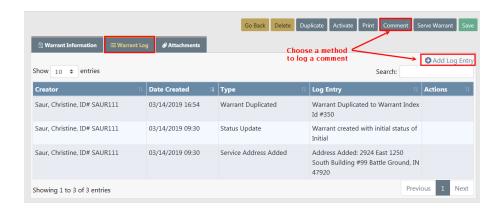


# **Warrant Log**

Warrant activity is systematically logged for tracking purposes, and you have the ability to manually create a log entry.

A log entry is created automatically when the warrant is created, updated, deleted, etc. Each entry captures the user's name, date, type of change, and comments.

The **Warrant Log** tab is accessible through the *Edit Warrant* page. For more information, refer to "Edit Warrant" on page 577.

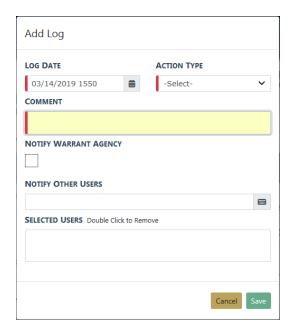


You can perform a **Search** for log entries containing a specific character string. Type the text in the **Search** text box on the upper right of the window to filter the results in the grid that matches the text you type.

You can log your own comments one of two ways:

- Click on the Comment action button on the top of the page.
- Or click on the Add Log Entry hyperlink.

Click on the method of your choice to display the **Add Log** form. Select the *Notify War-rant Agency* button to notify the Warrant Agency, or select other individual users or assigned officers.



The Log Date defaults to the current date and time but can be changed.

Click Save to post the log.

To provide real-time awareness, an email is sent to the identified recipients notifying them of the new **Warrant Log**, and the officers and selected users receive an Online RMS *Notification*. For more information on *Notifications* refer to "Notifications" on page 23.



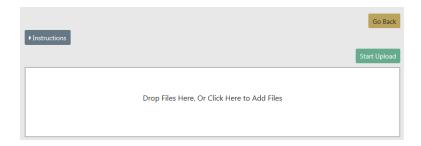
### **Warrant Attachments**

There may be times when it is necessary to attach a copy of the *Warrant* or any other documentation to the warrant within Online RMS.

Access the **Attachments** tab from the *Edit Warrant* page.



Select the Add Attachments link to open the Add Attachment page.



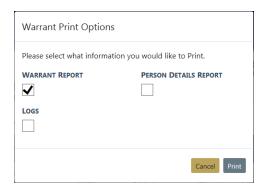
For details on adding Attachments refer to "Add Attachments" on page 67.

# **Print Warrant Report**

**Warrant Reports** are printed from the *View Warrant* or *Edit Warrant* page by clicking on the **Print** button at the top of the page. You also have the option to select whether or not to include *PDF Attachments* and *Warrant Logs* in the **Warrant Report**.



1. Check all options that apply.



#### 2. Click Print.

A PDF document opens in a new tab in your browser. Print directly to the printer or save the PDF document giving it a custom filename.

**Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.

## **Delete Warrant**

Users with proper permissions can delete warrants. For more information on permissions, refer to your agency administrator.

There are two ways to delete a warrant:

• From the Warrant Search Results page, click the **Delete** icon in the Actions column. For more information on searching for a warrant, refer to "Warrant Search" on page 570.



• From the *Edit Warrant* page, click on the **Delete** button at the top of the page. For more information on editing a warrant, refer to "Edit Warrant" on page 577.



Whichever method you use, a Delete Warrant window appears.

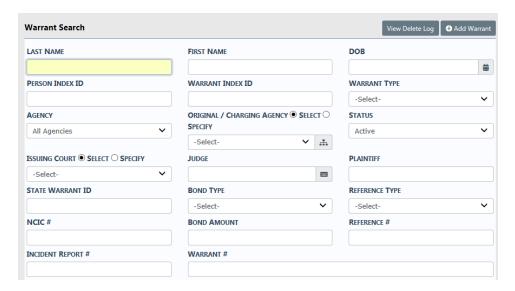


Enter your **Delete Comment** then click the **Delete** button.

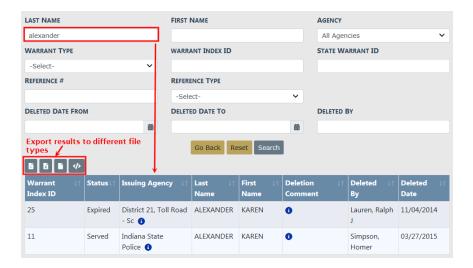
A Warrant Successfully Deleted message briefly appears across the top of the window, and a warrant delete log entry is created automatically with the deleted date, the user who deleted the warrant, comments, and other information. For instructions on accessing the Warrant Delete Log, refer to "View Warrant Delete Log" on the next page.

### **View Warrant Delete Log**

The Warrant Delete Log is accessed through the *Warrant Search* page. Click on the **View Delete Log** hyperlink to open the *Warrant Delete Search* page. For more information on how to access the *Warrant Search* page, refer to "Warrant Search" on page 570.



Enter search criteria then click **Search** to display a results list. This is useful when searching for a specific person, warrant type, etc., as the delete log can get quite lengthy over time. To display all entries, click **Search** without entering criteria.



You can export the results to PDF, Excel, CSV, or XML formats by clicking on one of the icons above the Warrant Index ID column. Hover your mouse over the icon to view the file format.

# **Chapter 29. Civil Process**

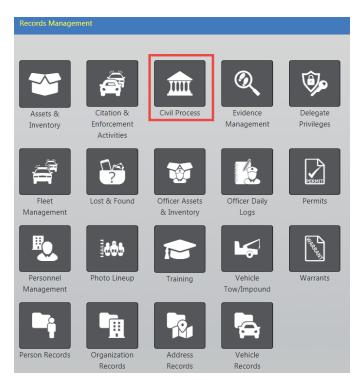
### Overview

The Civil Process application is found within the *Records Management* section. Click on Records Management You can hover over the tab and drag and drop or you can hard click on the tab and screen will open as it looks below.

To access the **Civil Process** module, select the **Civil Process** option from the *Records Management* drop-down menu.



Or, select the Civil Process Icon/link from the Records Management pages.



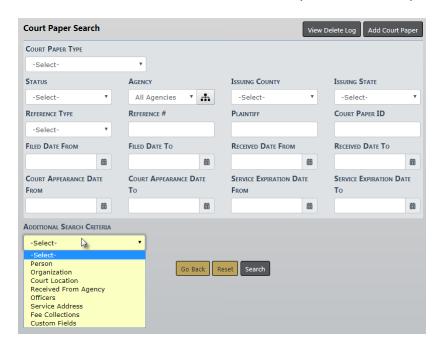
When you click on **Civil Process** you are first taken to a Search page section within **Civil** Process. Searching this module is done similar to other areas within Online RMS.

Note: The terms Court Paper and Civil Progress used throughout this chapter are synonymous with each other.

# **Court Paper**

#### Search

The search feature allows you to search upon any of the standard fields and additional criteria fields to generate the information you are seeking. List like with our other search areas those results can then be exported out as reports to manage the data.



Click into the Additional Search Criteria field to search on other fields. This is where you are able to search by Person, organization, officer, etc. The more information you provide in the search, the narrower the search results.

The results of the search criteria from above are displayed below with all matching data.

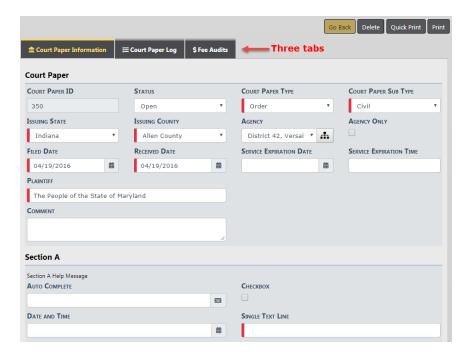


From this screen you can now access the record you want by using the **Edit** icon the right to make changes or update information. Click on the **Court Paper ID#** to enter the **View** mode for that particular court paper.

In **View** mode, you can see information about the paper as it was entered, add and view entries made in the log for service of the paper, and track incurred fees. This allows for tracking of changes, updates and service attempts.

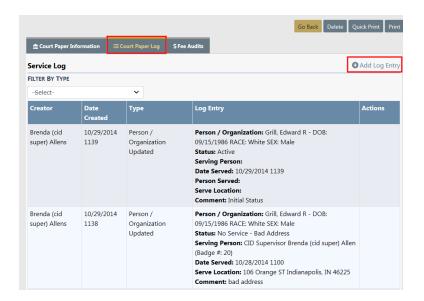
There are three tabs: Court Paper Information, Court Paper Log, and \$ Fee Audits.

The Court Paper Information tab opens by default.

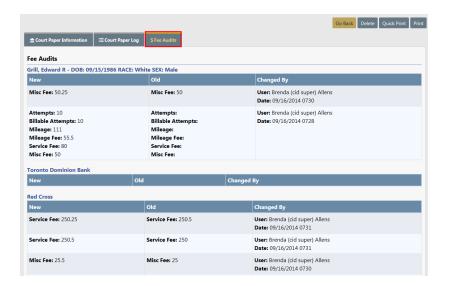


The Court Paper Log tab contains a log of updates made to the Court Paper, and the officer can manually log the attempts to serve the paper. Hover over the bubble to display the notes the officer made.

**Note:** The **Add Log Entry** hyperlink appears while in *Edit* mode, and not while in *View* mode.



#### The \$ Fee Audits tab tracks incurred fees.



#### Add

To create a new Court Paper select the **Add Court Paper** button to open the *Add Court Paper* screen.

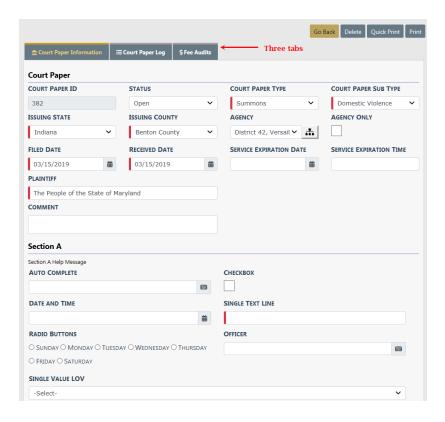


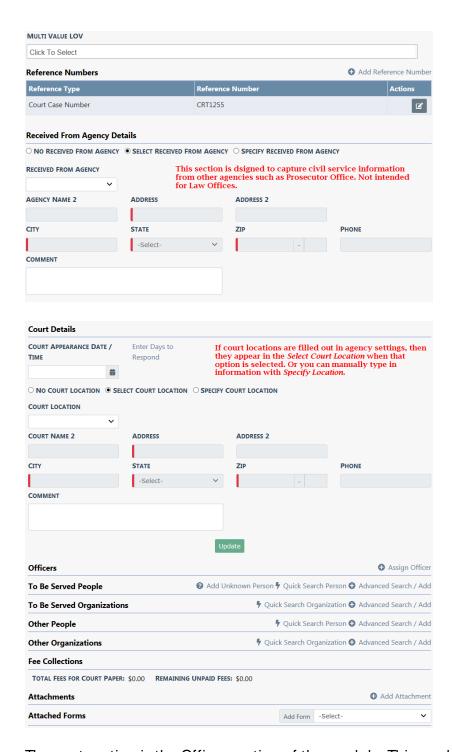
Select from the drop-down lists and enter other necessary information.

Click the Save button to create the record and display the Edit Court Paper screen.

### **Edit Court Paper**

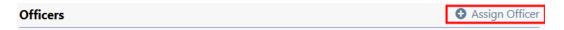
The Edit Court Paper screen allows you to continue entering information section by section. Data entered in the Add Court Paper screen auto populates into the fields within this screen.



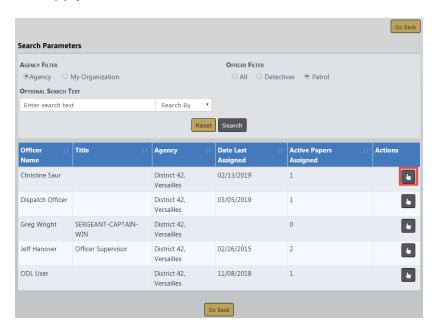


The next section is the Officer section of the module. This can be utilized if you want to assign the paper to a specific Officer. The officer receives notification of the assignment and it appears in their *Recent Activities*.

To add Officer to paper, click the Assign Officer link.



The a list of officers appear. Click the Select icon to make your selection. You can also apply filters to shorten the list from which to choose.



Officer Details window opens. This is where you can leave comments to officer and also check to notify officer.



Next two sections are about the Persons/Organizations to be served and the Other Persons/Organizations involved with the paper. Caliber Public Safety recommends using the **Advanced Search/Add** link to search *Master Index* data. For more information on *Master Index*, refer to "Master Indices" on page 81.

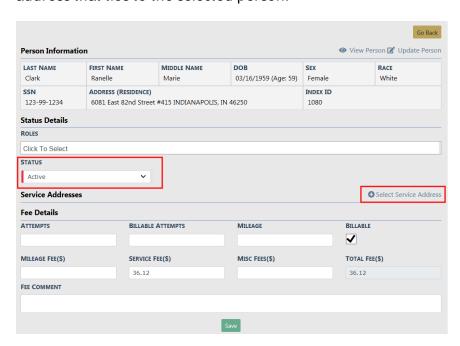


- The Add Unknown Person link captures service where evictions might be involved, or total number of people to be served is not known. Agencies have different uses for this.
- The Other People/Organizations section captures the non-serveable persons or organizations of the paper. Typical usage is for the payor, and where garnishments and fees are handled.

Perform search on the person /organization that you would like serve. Select the person that is to be served, if exists, by the **Index I.D**. or by using the **Select** icon in the *Actions* column. Add new person if not in the *Master Index*. For more information on adding a person refer to "Adding Person" on page 97 in the *Master Indices* section.



Half way down is a drop-down that lets you set the **Status** for the person. This is what triggers your *Master Name Index* to notify officers of an Active Paper when a master name search is done. Also, click on the **Select Service Address** link to select the address that ties to the selected person.

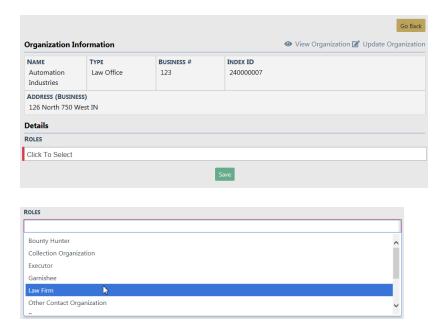


Fee details are discussed little more in detail later. From the officer serving the paper they typically only have access to the non gray boxes and the comment section. Attempts also can be captured in the log with a note of mileage. The use of this would be a business process determine by agency of when and whom applies Fee details.

Click Save to save the person/organization record to the Court Paper.

Adding **Other Person/Organization** to paper is done by some advanced search/add method. After selecting from *Master Index* or adding new you will be taken to this page. For more information on *Master Index*, refer to "Master Indices" on page 81.

**Note**: The Fee collection only shows after the **Payor Role** is selected. You can have more that one role assigned.



• You can select more than one role. The *Payor* role triggers the *Fee Collections* section that keeps track of fees owed and is searchable.

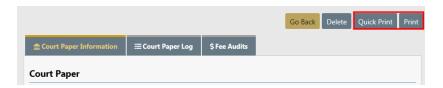
Click **Save** to save the other person/organization record to the Court Paper.

The last sections are the *Attachments* and *Forms* sections. You can add any relevant attachments to the paper or if your agency has a custom form associated with civil process it would be selectable here as well.



### **Print Court Paper**

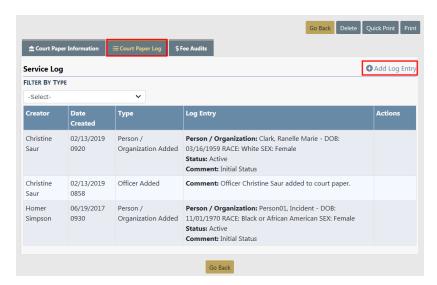
From the *View Court Paper* and *Edit Court Paper* screens there are **Print** and **Quick Print** options on the top right of the screen to print a cover page for your civil/court paper.



The **Print** button gives you selectable options to include on your cover sheet, whereas, **Quick Print** does not.



System creates system log entries automatically. You can also click the **Add Log Entry** link to manually enter log actions.



### Add Mileage/Attempts and Fees

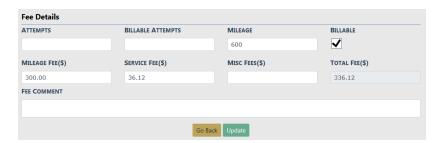
While on the Court Paper, page down to the **To Be Served People** section. The permissions to manage Fee details is given by default to both the *Agency Admin Role* and *LEA Cerk Management Role*; all other users only have ability to edit the **Attempts** and **Mileage** boxes.



Click on the **Edit** icon to open the court paper. The *Person Information* displays.



At the bottom of the page is a section where you fill in the information in regards to tracking the service of the paper. You can notate attempts, the mileage for the attempts, and the fee's to be collected in regards to the court paper.



#### Status Details

The **Status** of the paper would be changed to show the final status that the paper would have. Choices would be in status details section in the following screen shot to capture a served-executed paper service.



Select the **Update** button to save your changes.

Once you are finished with paper the *Fee Collections* section is completed. You now want to be able to collect fees and keep track of what has been paid on and what might still be owed.

Click the **Edit** icon on the *Organization Details* for the Payor and then click the **Add** link. This will create another entry point for receiving remainder fees as they come in.

**Fee Audits** also display on the *Edit Court Paper* screen.

<b>≜</b> Court Paper Information <b>≡</b> Co	urt Paper Log \$ Fee Audits	
Fee Audits		
Fallon, Jim X3 - DOB: 06/01/197	3 RACE: White SEX: Male	
New	Old	Changed By
Mileage: 900 Mileage Fee: 450 Service Fee: 36.12	Mileage: Mileage Fee: Service Fee:	<b>User:</b> Homer Simpson <b>Date:</b> 06/16/2017 1232

You can click the **Print** or Quick button to generate a *Court Paper Report*. For details on printing the report, refer to "Print Court Paper" on page 604.

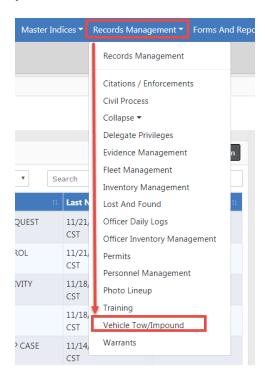
# Chapter 30. Vehicle Tow/Impound

### Overview

The **Vehicle Tow/Impound** module is found under the *Records Management* menu on the *Home Page* 

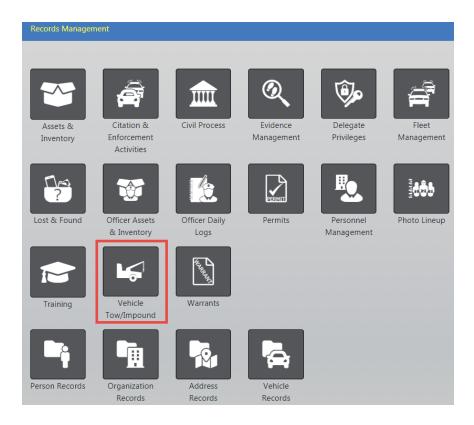
You can access this module two ways:

Click Records Management on the top navigation bar, then click Vehicle Tow/Impound.

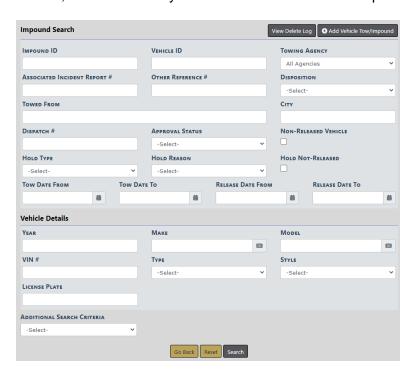


Click Records Management on the top navigation bar, click on the Records Management option that appears in the drop-down list, then click the Vehicle Tow/Impound link.





Either method opens the *Vehicle Tow/Impound Search* screen. After selecting the icon you are taken to *Search* application. You can either view the delete log, add a new record, or search the system for data that matches specific criteria.



Click **Go Back** to return to the previous screen, click **Reset** to start a new search, or click the **Search** button to search for records containing the entered criteria.

**Note:** Clicking the **Quick Impound** button will display the Add Vehicle Tow/Impound screen, with the vehicle already selected. Clicking **Save & Select** will display the Incident Edit screen with the newly created impound associated and ready to be edited.

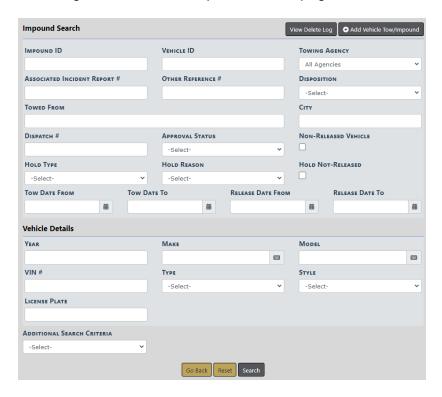
For information on viewing the delete log refer to "Logs" on page 625.

For information on adding a new tow/impound record refer to "Enter New Vehicle Tow" on page 612.

For information on searching for existing records refer to "Search Vehicle Tow/Impound" below.

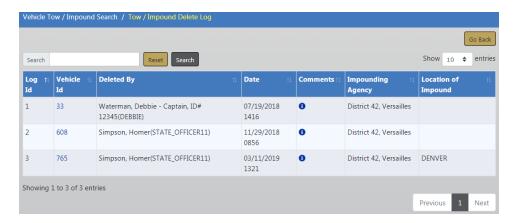
# Search Vehicle Tow/Impound

Access the *Vehicle Tow/Impound Search* page to begin your search. For more information on accessing the *Vehicle Tow/Impound Search* page refer to "Overview" on page 607.



Click on the **Add Vehicle Tow/Impound** button to add a new tow record. For more information on adding a new tow record, refer to "Enter New Vehicle Tow" on page 612.

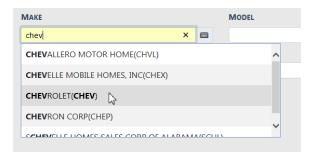
Click on the View Delete Log button to view deleted tow records.



Click the Go Back button to return to the Vehicle Tow/Impound Search page.

Enter your search criteria on the *Vehicle Tow/Impound Search* page to search and locate existing records that match your entered criteria.

When searching by Make and Model, begin entering a portion of the word and a list will appear from which to choose. For example, enter *Chev* in the **Make** field to display a list that contains *Chev* then click on the appropriate item that appears on the list. Optionally, do the same for **Model** 



The **Additional Search Criteria** allows you to include other fields such as People, Organization, Officers, Tow Company, and Custom fields. Choose an option and enter criteria in the fields that appear based on your selection.

If you choose **Custom Fields**, the **Available Fields** appear; click in the field and choose from the drop-down list.



**Note**: Custom Fields is available for agencies that have the Custom Fields feature enabled. Custom Fields captures data defined by the agency. For more information refer to your administrator.

Click the **Search** button to display the search results.



Hover the mouse over the blue information bubble to view a summary of the vehicle or click on the Impound ID to view vehicle and tow details.



With proper permissions, you can view, edit, delete Tow/Impound records, release holds, or release vehicles using the icons that appear under the *Actions* column. Only the icons to which you have access appear. If you do not have permissions to perform any of these tasks, refer to your agency administrator.

#### **Action Icons**

- View Vehicle Tow/Impound Record
- Edit Vehicle Tow/Impound Record. For instructions on editing tow records, refer to "Update Existing" on page 614.

- Release Holds. For instructions on releasing holds, refer to "Vehicle Holds" on page 621.
- Release Vehicle. All Holds must be released before you can release a vehicle.

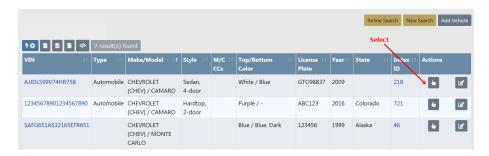
# **Enter New Vehicle Tow**

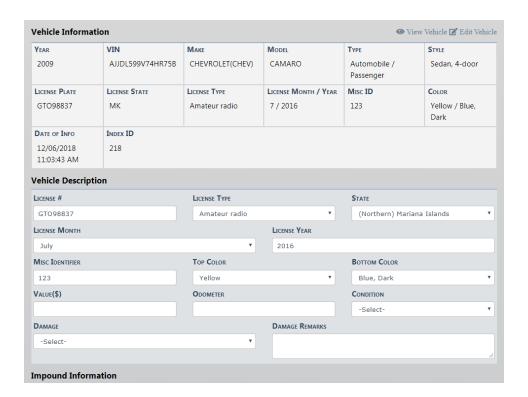
Access the *Vehicle Tow/Impound Search* page. For more information on accessing the *Vehicle Tow/Impound Search* page refer to "Overview" on page 607.

On the *Vehicle Tow/Impound Search* page, click the **Add Vehicle Tow/Impound** button to open the *Master Index Search* page. Search for the Master Vehicle Index record you want to add to the Tow/Impound module.

If the Master Vehicle Index record you are searching for does not exist, then click the **Add Vehicle** link to add a new Master Vehicle Index record. For more information on Master Indices refer to "Master Indices" on page 81.

In the Vehicle Search Results window, click the Select icon on the vehicle you want to add to a new Tow/Impound record.





Enter the tow date and time and other relevant information for this **Tow/Impound** record.

Click the **Save** button on the bottom of the page, or upper right.

The *Edit Impound* page appears, allowing you to select a **Towing Company**, or specify one if it is not in the system. Also you can associate people, organizations, and other information. Holds are also managed here on a separate tab, along with an audit log on another tab. For more information on the *Edit Impound* page refer to "Update Existing" on the next page.

Click the **Print** button to print the record, or click the **Submit** button to submit the record for approval. For instructions on printing *Vehicle Tow/Impound* records, refer to "Print" on page 626.

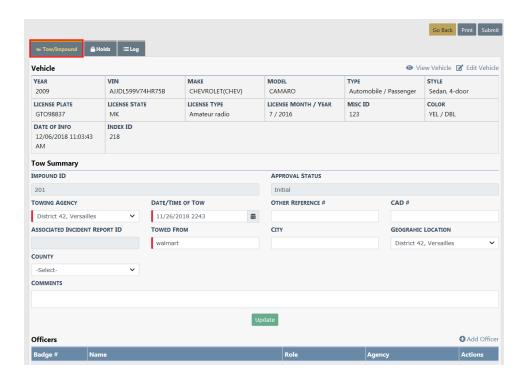


# **Update Existing**

Search for the *Vehicle Tow/Impound* record you want to update. For more information on searching for existing records, refer to "Search Vehicle Tow/Impound" on page 609.

The creator can edit their initial impound records within or outside lock hours, regardless if there is a release date nor not. However, impound records that are pending approved or approved cannot be edited.

On the Search Results window identify the record you want to update then click the update icon in the Actions column to open the Edit Impound page.



The Edit Impound page contains three tabs:

- Tow/Impound
- Holds
- Log

Click the **Print** button on the top right to print the record. For instructions on printing *Vehicle Tow/Impound* records, refer to "Print" on page 626.

# **Tow/Impound Tab**

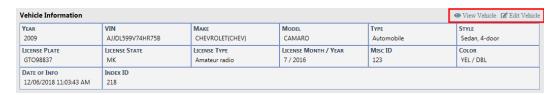
The Edit Impound page defaults to this tab, which contains multiple sections:

- Vehicle Information
- People
- Organizations
- Tow Summary
- Officers

- Vehicle Description
- Towing Details
- Inventory
- Attachments (i.e., documents and photos)

### Vehicle Information

This section displays the *Master Vehicle Index* data. You can click on the **View Vehicle** link to view details of the index record or you can, with proper permissions, click on the **Edit Vehicle** link to edit the *Master Vehicle Index* record.

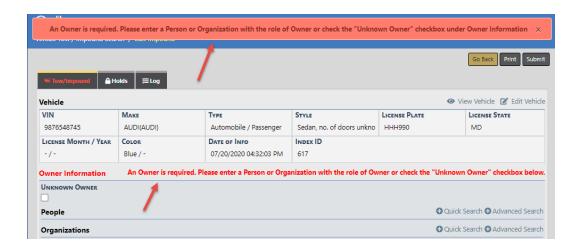


### People

The **People** section allows you to search the *Master Name Index* and use existing records if already in system by clicking on the **Quick Search Person link**, or you can, with proper permissions, add a new *Master Name Index* record by clicking on the **Advanced Search / Add** link. For more information on Master Indices, refer to "Master Indices" on page 81.



Owner information is required to update a Tow Impound record. If the record does not contain owner information, a message appears in red across the top of the form and below the Vehicle section when you click on the Update button. If the owner is unknown, check the **Unknown Owner** box to override the *owner required* warning.



### **Organizations**

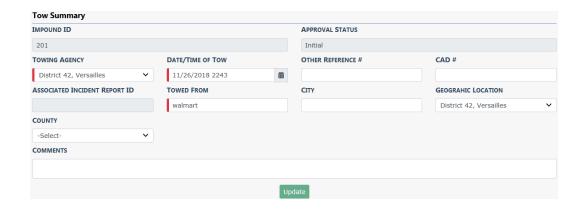
The **Organizations** section allows you to search the *Master Organization Index* and use existing records if already in system by clicking on the **Quick Search Organization** link, or you can, with proper permissions, add a new *Master Organization Index* record by clicking on the **Advanced Search/Add** link. For more information on Master Indices, refer to "Master Indices" on page 81.



### **Tow Summary**

Enter the appropriate information then click the **Update** button.

**Note:** The **Towing Agency** defaults to your agency and should not be changed.



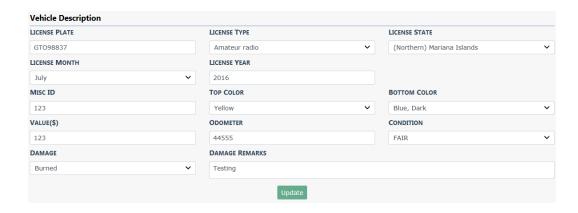
### **Officers**

Click the Add Officer button to add an officer, then click Save.



## Vehicle Description

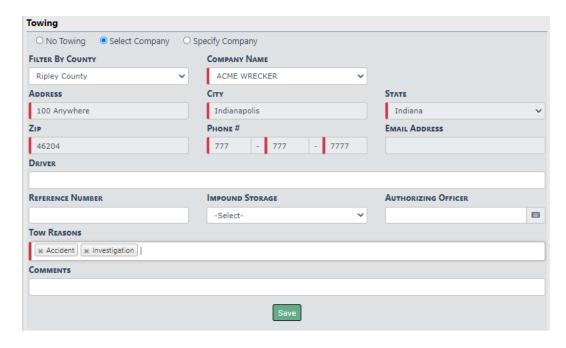
Enter the appropriate information then click the **Update** button. This is information based on your current observation.



### **Towing**

Select one towing option: No Towing, Select Company, or Specify Company.

If you choose Select Company or Specify Company, enter the appropriate information in the fields provided. If you choose No Towing, no additional fields appear.



Click the Save button to save the record.

### Inventory

Click the Add Item link to add an Inventory item.



#### **Attachments**

Click the Add Attachment link to add photos or documents.



For more information on attachments, refer to "Attachments" on page 67.

### **Holds Tab**

This tab contains dates, reasons, and comments pertaining to vehicle holds and releases.



For more information on holds, refer to "Vehicle Holds" on the facing page.

# Log Tab

Data that contains the date, time, and a summary of what occurred such as, when the record was created in Online RMS, hold and release dates, etc. The data is generated by Online RMS automatically, and you have the ability to manually add a log entry.



For more information on Log entries, refer to "Logs" on page 625.

# **Vehicle Holds**

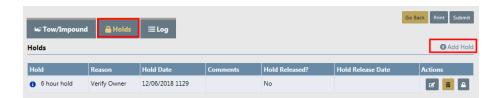
You can place a hold from the Holds tab of the Edit Impound page.

For more information on accessing the *Edit Impound* page, refer to "Update Existing" on page 614.

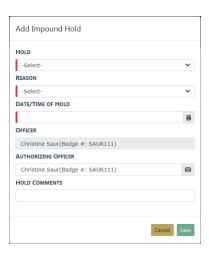
### Place a Hold

Click on the Holdstab of the Edit Impound page.

Click on the Add Hold link to open the Add Impound Hold window.



Enter the appropriate information in the Add Impound Hold window, then click Save.



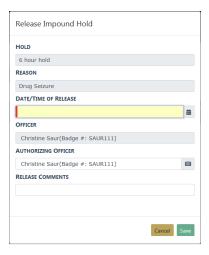
You can edit, delete, or release a hold by clicking on the appropriate action icon.

### Release Holds

There are two ways you can release a hold:

From the Holdstab of the Edit Impound page.

To release a hold on a vehicle, click on the **Release Hold** icon that appears in the *Actions* column to open the *Release Impound Hold* window.



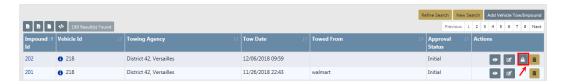
Enter the **Date and Time of Release** and **Release Comments**, then click the **Save** button.

For more information on accessing the *Edit Impound* page, refer to "Update Existing" on page 614.

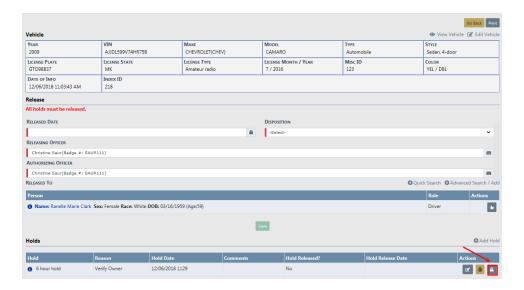
From the Impound Search Results.

Click on the Release Hold icon 

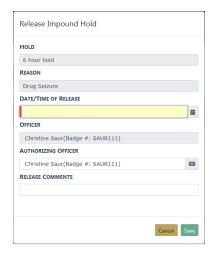
to open the Release Impound page



Click on the **Release Hold** icon in the *Holds* section to open the *Release Impound Hold* window.



Enter the Date and Time of Release, and Release Comments, then click Save.



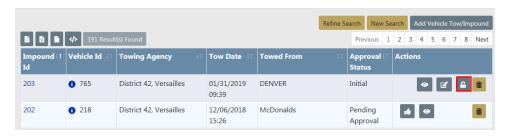
For more information on accessing the search results, refer to "Search Vehicle Tow/Impound" on page 609.

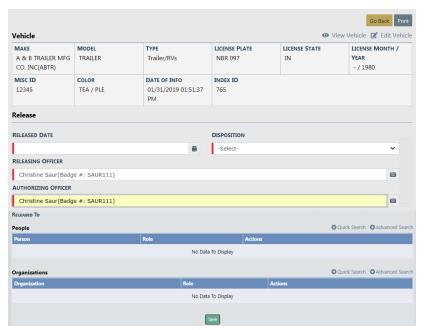
## Release Vehicles

Vehicles are **Released** from impound from the *Impound Search Results* page.

Search for the *Vehicle Tow/Impound* record you want to release from impound. For more information on accessing the *Impound Search* page refer to "Overview" on page 607.

Locate the appropriate record in the *Impound Search Results* page that you want to release, then click on the **Release Vehicle** icon in the *Actions* column to open the *Release Vehicle Tow/Impound* form.





**Note**: All vehicle **Holds** must be released prior to releasing the vehicle. For instructions on releasing **Holds**, refer to "Vehicle Holds" on page 621.

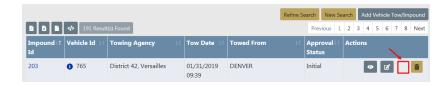
Click either the **Quick Search** or **Advanced Search** link to search and select the person or organization to whom the vehicle is **Released To**.

Note: If the person or organization record does not exist and you have proper permissions, you can create the *Master Person Index* or *Master Organization Index* record by clicking on the **Advanced Search** link. For instructions on creating a *Master Person Index* record, refer to the "Adding Person" on page 97 section of the *Master Indices* chapter (follow a similar process when adding *Master Organizations*). For more information on permissions, refer to your agency administrator.

Click the **Save** button. A **Successfully Updated** message briefly appears above the **Released Date**.

A record is added to the **Log** automatically.

Click on the **Go Back** button at the top of the page to return to the *Search Results* page. The **Release Vehicle** icon on longer displays in the *Actions* column on the vehicle record, indicating the vehicle is no longer in impound status.



Click on the Go Back button to return to the Vehicle Tow/Impound Search page.

# Logs

The *Log* tab of the *Edit Impound* page displays impound activity that was systematically logged for that particular vehicle, including manual log entries you create. For details on accessing the *Edit Impound* page, refer to "Update Existing" on page 614.

The number of log entries can get long. To search for particular log entries, enter a keyword in the search text field then click the **Search** button.



Optionally, click on **Add Log Entry** to create your own log entry, then enter **Comments** and the **Save** button.



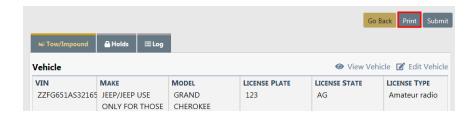
You can edit or delete manual log entries; however, log entries generated by the system are read-only. Click the edit icon to update the record, or click the trash icon to delete.



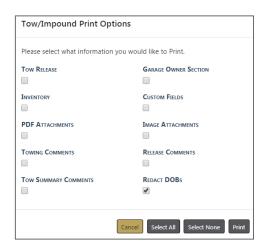
# **Print**

You can print the *Vehicle Tow/Impound* record from the *Edit Impound* page. For instructions on accessing the *Edit Impound* page, refer to "Update Existing" on page 614.

Click the **Print** button on the top right of the window.



The *Tow/Impound Print Options* window opens. Select the options you want to include in the report; green options are included and gray options are not.



Click the **Print** button on the bottom right.

A PDF document opens in a new tab in your browser. Print directly to the printer or save the PDF document giving it a custom filename.

**Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.

# **Chapter 31.Inventory and Assets**

# **Inventory Overview**

**Inventory Management** allows an organization to designate storage locations and maintain on-hand stock items. A user-defined hierarchy and shared item descriptors provide the agency with a means to perform uniform data entry across the entire organization. Managers of these locations can assign items to officers, employees, locations, vehicles, and organizations. Additionally management capability allows officers, employees, and supervisors to manage and track issued equipment. Accountability is maintained for each transaction which creates a history within the module.

# **Inventory Roles**

There are three system-level inventory roles for the Assets and Inventory Modules:

- Inventory Manager role is given to any user who manages warehouse locations.
- Inventory Sub-Manager role is given to any user who is not a warehouse manager but who has control over non-warehouse (other) locations.

**Note**: The two roles above are mutually exclusive. That is, no user should have both roles at the same time.

 Inventory Admin role is given to the user who controls the administrative set-up of the module. (This role can be combined with the Inventory Manager role) In addition, four pre-existing roles (Officer, Officer Supervisor, CID User, and CID Supervisor) have been given the new permission categories prefixed with Inventory For Officers.

Anyone who uses inventory management should have the *Inventory – Basic Access* permission category in order to have the basic inventory functionality.

Two basic permission categories are:

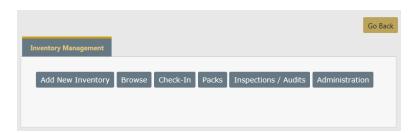
- Inventory Show the Inventory Main Screen
- Inventory Show the Officer Inventory Screen

Note: A user must have one of these to get started.

**Note**: Vehicle Make, Model, Type, and Styles share admin tables with the Reet Management Module.

# **Inventory Management Page**

When the administration or setup portion of *Inventory Management* is complete, the Inventory Management page appears. For more information on Inventory Administration refer to your agency administrator.



To gain access to the Inventory Management page, you must be assigned as a Location Manager. If you are not assigned as a Location Manager a message appears on the right stating you do not have manager access to locations. If you have Inventory\_Manager permissions, an Administration button also appears on the Inventory Management page.



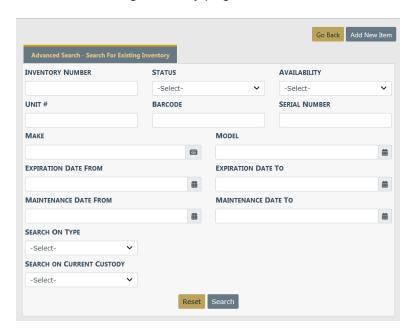
If visible, click the Administration button, to open the Inventory Administration page to set up Location Manager. For more information on Inventory Administration refer to the Caliber Online Administration Guide.

If the **Administration** button is not visible, contact your agency administrator.

# Add Inventory

**Add Inventory** allows you to add quantities to current items. Use the following procedures to add Inventory:

From the *Inventory Management* page, select the **Add New Inventory** link to open the *Search For Existing Inventory* page.

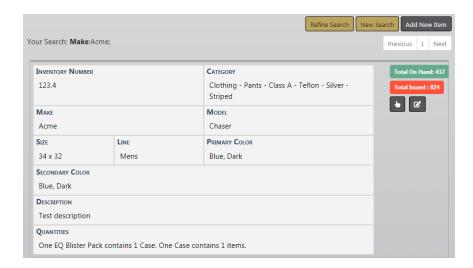


**Note**: The first step to adding inventory is always to search for existing inventory with descriptions that apply to the item(s) you want to add. This is to ensure that duplicate entries are not made. The goal is to locate and use existing entries to add additional quantities so that the same descriptors are shared across the entire organization.

Perform the search to display the Search Results page. For details refer to "Search for Existing Inventory" on the next page.

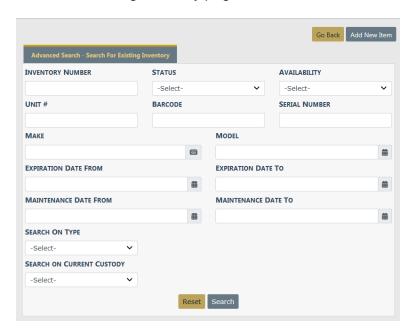
If there are no matches to your search then you need to add the new inventory. For details refer to "Add New Inventory" on page 635.

If the search results returns records, add the inventory to existing inventory. For details refer to "Add to Existing Inventory" on page 633



# Search for Existing Inventory

From the *Incident Management* page, select the **Add New Inventory** link to open the *Search For Existing Inventory* page.

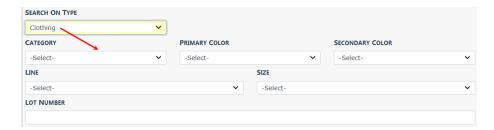


Complete as many of the fields in the Advanced Search section as you can.

- The Inventory Number field is not required, and it only applies if your agency uses inventory numbers.
- Select/enter values for any of the fields for which you have information.

Any field with an Auto Filter icon to the right provides a list that matches your text. Begin typing in this field and it brings up a selection based on what you have typed. The fields that display -Select- contains a drop-down selection from which to choose. Click a selection to pull it into the field.

If you choose **Search On Type**, additional fields appear based on your selection.

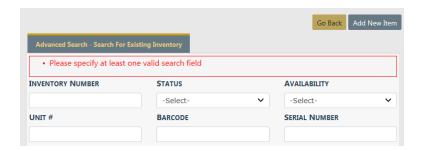


If you choose to **Search on Current Custody**, additional fields appear based on your selection.



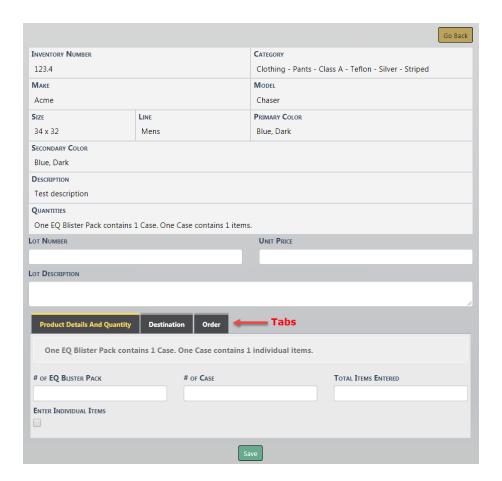
Once you have made the selections, select **Search**.

If you select **Search** without entering a valid search field, the *Search For Existing Inventory* page displays with an error message as shown.



# Add to Existing Inventory

Once you have performed a search and the search results page returns, locate an item description that matches the item(s) you want to add to the inventory then select the next to the item to add to the inventory.



Enter all the information you have available to include the Product Details and Quantity. Destination and Order Tabs. Select **Save**. You receive the message ensuring you that the new item(s) are being entered into the system.



Click **Yes** to enter the new items, or click **No** to return to the previous screen without entering the new items.

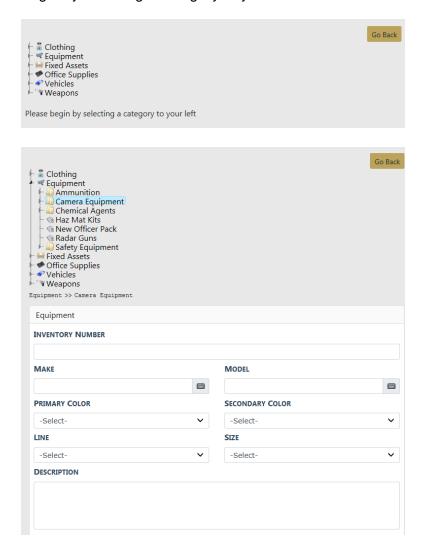
## **Add New Inventory**

If there is nothing in the system that matches your search, a *No search results found* message displays.



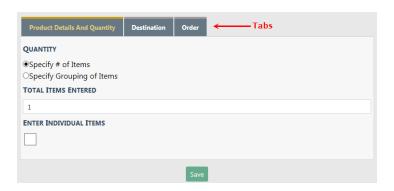
Add the new item by selecting the **Add New Item** button on the top right.

Begin by selecting a Category to your left.



Enter as much information regarding the new Inventory item.

Page down to fill in the *Product Details*, *Destination* and *Order* tabs. Required fields display a red border to the left of the field. Be sure to check all tabs for required fields.



Once all information is entered for the New Inventory Item, select **Save**.

You receive a notification that you are about to enter an amount of items into the system, select **Yes** or **No**.

### **Edit Entries**

The inventory manager can edit entries in the inventory module. However, the manager must always be aware that item descriptors are shared so edits affect other agencies in the same organization.

Editing Item Descriptors (shared): When adding new inventory the inventory manager searches to determine if the item descriptors already exist in Online RMS. If search results return a match, the manager selects item descriptors to add new quantity on-hand to update the warehouse. While reviewing the search results, the user can also edit item descriptors.

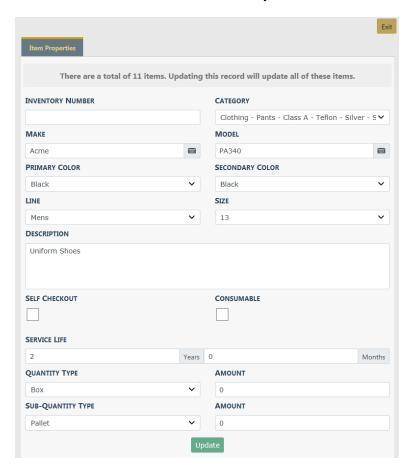
**Note**: Changes affect all entries across the entire organization. A warning banner displays across the top of the page if matching records exist.

There are a total of 11 items. Updating this record will update all of these items.

Editing Item Details (not shared): While browsing existing inventory (stock onhand), the manager can edit the on-hand detail specific to the warehouse. Fields open for edit include: Unit Number, Serial Number, Barcode Number, Expiration Date, Maintenance Date, Status, Usability, and the Disposed check box.

Log entries can be reviewed or created as needed per item. Custody history is also available for viewing and is updated automatically each time an event takes place

Select the icon next to the item you wish to edit to display the edit page.



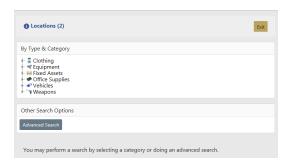
Make the needed changes then select **Update**. A message appears across the top of the page letting you know the Inventory Item has been updated. Select **Exit**.

You may edit another item or elect to **Go Back** so you can search for another item to perform the same or a different task.

## **Browse**

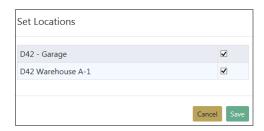
Using the **Browse** feature, the inventory manager can search one or more warehouse locations by the type and category tree. (An advanced search is available for greater refinement.) The search results allow the inventory manager to select items to create a list. The inventory manager can then take action on the list, which is treated as a single group, and the selected action is applied to all items in the list. Actions available allow the inventory manager to assign items as needed to meet various needs. (Online RMS records each transaction as it occurs.)

From the *Inventory Management* page, click the **Browse** option to display the Browse screen.



The number of locations available to the current user is shown to the far left in the *Locations* banner near the top of the page.

Click the blue information bubble icon to the left of *Locations* to set the locations.



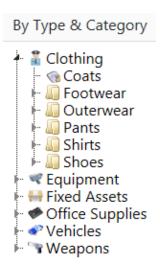
To make the listed location available, ensure the box to the right is checked

To make the location unavailable, remove the check mark

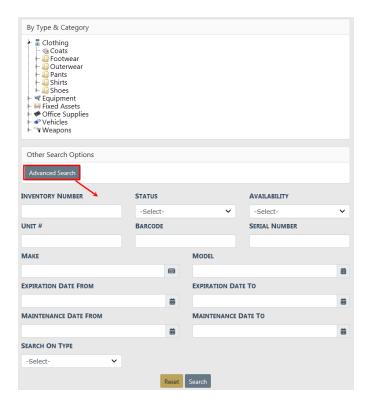
Types are listed in the **By Type & Category** section in the upper left.



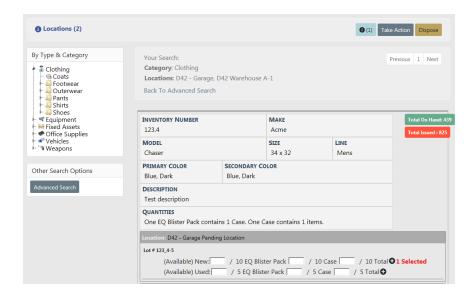
Categories are contained within the types folders.



The Other Search Options contains Advanced Search. Click on the Advanced Search button to view additional search fields.



Enter the search criteria then click the Search button to return results.



To select items from a category, type the quantity that you want to select in text field to the immediate left of the  $\odot$  icon and click  $\odot$  to display the number of items you want to select as shown in the partial example below.



When you have selected items, the number of items selected as well as the Take Action and Dispose option replace the No Selection label to the far right in the Location banner.

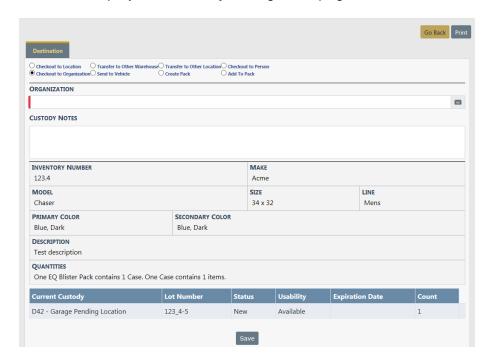


You can click on the ticon to display the *View Selected Items* page where you can delete individual items, Clear All Items, and/or Print your current selection. Select **Go Back** to return to the previous page.



Continue to browse and select items as needed.

When you have selected all the items you want to take a particular action on, click **Take Action** to display the *Inventory Management* page as shown.



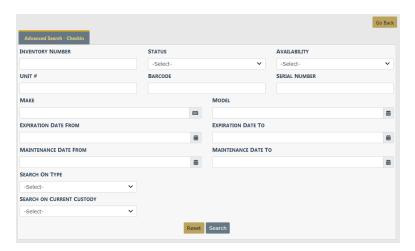
Select the appropriate radio button to indicate the destination of the item(s):

- Selection of Checkout to Location or Transfer to Other Location changes the display to include a field for selection of a Location.
- Selection of Checkout to Organization changes the display to include a field for selection of an Organization field.
- Selection of Checkout to Person changes the display to include a field for selection of an Officer / Employee.
- Selection of Transfer to Warehouse changes the display to include a field for selection of a Warehouse.
- Selection of Send to Vehicle displays the Select Vehicle window to allow selection of a vehicle.
- Selection of Create Pack changes the display to include additional fields to set up a pack.
- Selection of Add to Pack displays the Select Pack window to allow selection of a pack.

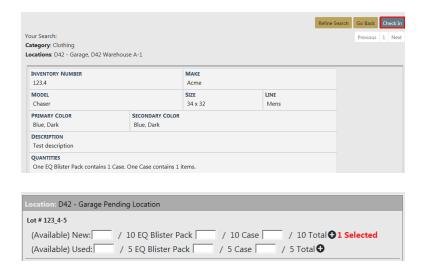
## Check In

The inventory check-in process allows the manager to search for and check-in items that have been checked out (assigned) to a person, location, organization, or vehicle. A printed receipt to formalize the process is also available should one be needed.

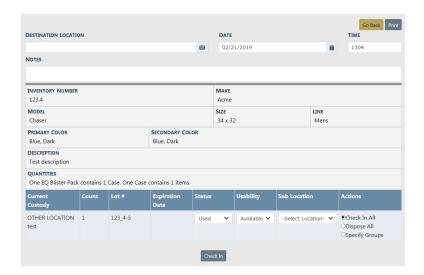
From the *Inventory Management* page, select **Check-In** to open the *Advanced Search - Checkin* page.



Perform a search to locate the item(s) you want to check in. Enter the number to checkin to the left of the item, then click the plus sign (+) to select.

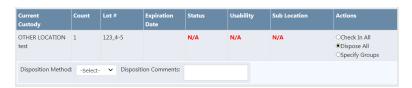


Select Check In to display the Check In page.

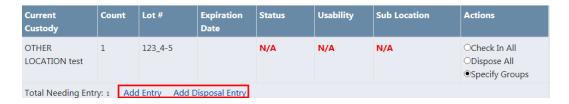


Complete the Destination Location field and other fields as needed. Select the applicable radio button in the *Actions* column.

When you choose to Dispose of an item(s) you are given the option to select the Disposition Method and enter any Disposition Comments, and click **Check In**.



When you choose to Specify Groups **Add Entry** and **Add Disposal Entry** links appear. Click on the links to enter additional information.



A notification appears at the top of the screen advising the Check In was successful.

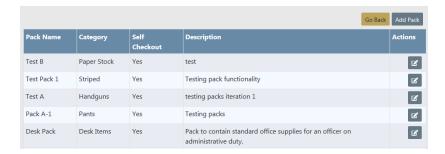
**Note**: For items checked back into a specific location, the on-hand count increases and the current location updates.

## **Packs**

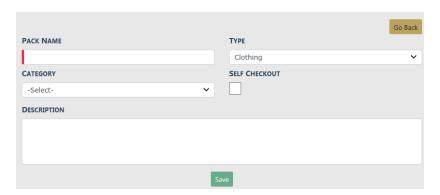
A **Pack** is a collection of items within a single grouping, i.e. initial issue. The **Pack** can then be checked out (assigned) as necessary.

**Note**: Before a new **Pack** can be created, the inventory manager must set up a pack category in the inventory tree under the appropriate type. (Pack categories can be set up under more than one type.) This is done via the *Inventory Setup* tab in the *Inventory Administration*.

From the *Inventory Management* page, select the **Packs** option to open the *Inventory Management – Manage Packs* page.



Select the **Add Pack** button to open the *Manage Packs – Pack Details* page.



- Click in the Pack Name field and type a meaningful name to identify this grouping.
- In the Type field, select the type of inventory item to be grouped in this pack.
- In the Category field, select the appropriate pack category.
- If you want individuals to be able to check out this pack, click the Self Checkout box.
- In the Description field, type a brief description of the item.

Select Save to return to the previous page where the new Pack now appears.

# Inspections / Audits

Online RMS allows users with the appropriate roles to create inspections/audits and maintain the records. The idea is to create each type of inspection/audit that the agency needs. Print the report and use it to record the results of an inspection or audit.

Note: An Audit is a count of items by type, location, custody, and so forth.

An Inspection also provides information about the item(s). The printed paper report available from each instance of an inspection/audit is used to record the results of the inspection/audit. The content of the report is persistent (stays the same over time) unless edited.

From the *Inventory Management* page select **Inspections / Audits**.

The Inspection Search page appears.

					Go Back Add Inspection
INSPECTION DATE FROM		INSPECTION DATE TO		NEXT INSPECTION DATE FROM	NEXT INSPECTION DATE TO
	<b>=</b>	曲		<b>=</b>	<b>=</b>
STATUS				LIMIT TO MY INSPECTIONS	
-Select-		~			
		Rese	t	Search	

This page displays first to allow you to locate any existing inspection reports that suit your purpose, and if none are available, use the **Add Inspection** link to create a new one.

If you know that you need to create a new inspection, there is no need to perform a search, click the **Add Inspection** button to open the *Inventory Management – Add Inspection* page and create a new inspection (audit).

You can search by Inspection Date or Next Inspection Date (use the calendar icon to specify a beginning and/or ending date), by Status (New, Completed, Canceled), or you can limit the search to only the inspections you have created by clicking the Limit to My Inspections box, or just click Search to return a list of all inspection records, which may be an extensive list.

Complete the fields to limit your search as needed, then click **Search** to display the *Inspection Search Results* page.

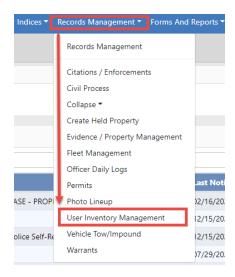


The icons in the *Actions* column allow you to edit the inspection (if you are the owner), print it, or review it. If an icon is not available to you, then you do not have permissions to perform that action.

# **User Inventory Management**

Use the following procedure to access the *User Inventory Management* module:

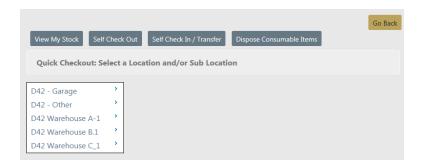
From the Home page, click the *Records Management* label to display a drop-down menu as shown.



Select the *User Inventory Management* option to display the *Inventory Management* page as shown below. There are four tabs available:

- View My Stock
- Self Check Out
- Self Check In/Transfer

Dispose Consumable Items



**Note**: Depending upon your agency's configuration set-up and your roles and permissions, the options displayed may vary.

Select View My Stock to open the view My Stock - Search Results page.

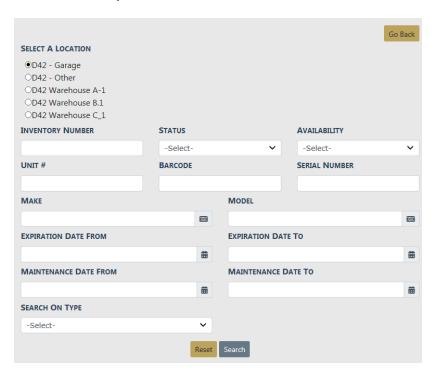


This allows the Officer/Employee to view the items that have been issued or checked out to them.

## Self Checkout

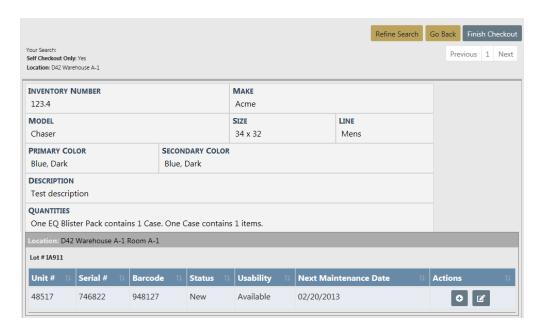
The **Self Checkout** feature addresses the need for specific items to be available on a routine basis. To maintain accountability, items designated by the inventory manager for **Self Checkout** can be checked out and in without manager intervention from **Self** 

Checkout locations. For example, if hand held radar units were assigned to a patrol room and designated as available for **Self Checkout**, anyone with appropriate permissions on any shift can check the radar out and back in as needed.



Inventory can be checked out to both officers and employees with appropriate permissions.

In order to **Self Checkout** an item(s), the inventory manager must make the location of the item available for **Self Checkout**. At a minimum, a location must be selected prior to selecting **Search**. Define the search as needed, select **Search**.



Using the icon, select the item(s) you wish to Self Checkout.

Once your selections are complete, select Finish Checkout.

Enter any Checkout Notes then select **Check Out**.



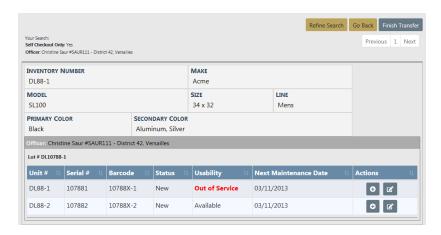
A confirmation message appears. Select the appropriate response.



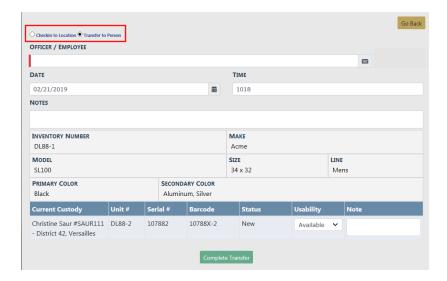
## Self Check In / Transfer

From the *Inventory for Officers* page, select **Self Check In / Transfer** to open the *Transfer Items - Search Results*.

The only items available on this screen are those that you had first Self Checked-Out.



Using the icon, select the item you wish to **Self Check-In/Transfer**. Once you have made all the selections, select **Finish Transfer**.

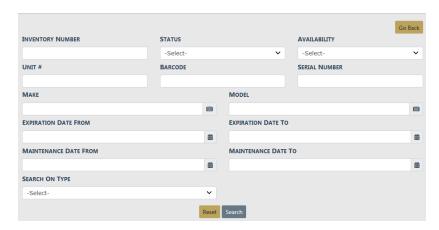


Choose either **Check-In to a Location** or **Transfer to a Person**. Add any notes then select **Complete Transfer**.

You are brought back to the Inventory for Officers page.

# **Dispose Consumable Items**

From the Officer Inventory Management page, select **Dispose Consumable Items** to open Inventory Search - Dispose.



Complete as many fields as you can to narrow your search. Click Search.

Click • to select the items to dispose and click Finish Disposal.

# Chapter 32. Fleet Management

## Overview

The **Fleet Management** module provides the ability to manage ownership costs and service maintenance activities for agency vehicles and equipment assigned for officers' use. Use this module to manage crash reports, track mileage and costs, maintenance history, what is due for maintenance, and submit or manage service requests for needed maintenance or repairs.

This module is available with full subscription access to Online RMS. It is disabled by default but can be enabled, and additional user training is available for purchase. Contact Caliber Public Safety Support for more information.

**Fleet Management** can be configured specific to your agency's needs, such as an eligible list of equipment and service types, service vendors, allowable vehicle types and categories, inspection types, and more. Refer to the *Online RMS Administrator Guide* for details.

## Fleet Management Permission Categories

There are five permission categories tied to the Fleet Management module:

Fleet Managers have the authority to access the Fleet Management Dashboard, create or view fleet vehicles, edit all fleet vehicles and equipment records, manage crash reports, approve service requests, manage vehicle assignments they have created, and create and edit service maintenance records.

If given the *always-edit assignment* permission, fleet managers can edit assignments created by other users.

If given the *always-edit fuel & Oil* permission, fleet managers can edit fuel/oil/mileage records created by other users.

Fleet managers can delete vehicles, only if given specific permissions.

- Mid-Level Managers have all the Fleet Manager's permissions except the following:
   The ability to add vehicles and edit the primary vehicle fields or any custom fields associated with the vehicle.
- Fleet Officers view fleet vehicles and equipment currently or previously assigned to them, assign themselves to existing vehicles, create fuel & oil and service requests on vehicles to which they are appointed.
- Fleet Clerk views fleet vehicles and add fuel & oil records with mileage, and edit records only if you are the creator and only if within lock hours.
- Application Administrators configure the set-up of the module, such as define the
  eligible list of equipment and service types, vehicle types and categories, service
  vendors, inspection types, and more. Refer to the Online RMS Administrator Guide for
  details.

Permission categories can be assigned to any role to allow the agency to best manage user access to application modules.

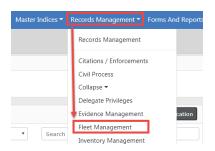
The person with the **Fleet Manager** permission category could also be an **Application Administrator**, or it could be two different people.

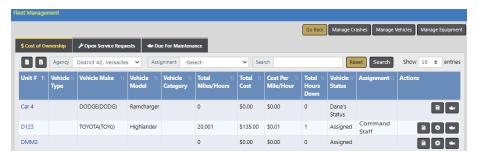
Note: Vehicle Make, Model, Type, and Styles for Fleet Vehicles share admin tables with the *Inventory and Asset Module*. Configure these values at the Organization level. The *Inventory and Asset Module* must be enabled, and the **Application Administrators** must also have the **Inventory\_Manager** role. Refer to the *Inventory and Asset* section of the *Online RMS Administrator Guide* for details.

## Fleet Manager

## Fleet Management Dashboard

Click on the **Records Management** menu to access the **Fleet Management Dash-board**, an interactive user interface used as a launching pad for viewing and managing fleet data.





For efficiency, the following icons allow you to quickly perform particular actions.

- Add an Custom Form to the fleet vehicle and assignments. For details, refer to "Add Custom Forms to Fleet Vehicle and Assignments" on page 681.
- End Open Assignments. For details, refer to "Vehicle Assignments" on page 692.
- Add a Fuel/Oil/Mileage record. For details, refer to "Manage Fuel, Oil, Mileage" on page 695.

## Other features of the Fleet Management Dashboard:

1. There are three tabs that contain existing vehicle information. Data within these tabs are read-only; capable of being displayed, but not changeable:



The active tab is a slightly different color than the other tabs.

## Cost of Ownership

 The total cost (purchase price + fuel and oil costs + maintenance and repair costs), total mileage or hours on the vehicle, and the cost per mile or hour. The dashboard defaults to this tab.

## **Open Service Requests**

Vehicles tied to submitted maintenance requests that are pending completion.

### **Due for Maintenance**

- Vehicles that meet set criteria since the last performed service maintenance.
- 2. Four buttons on the top right of the window:



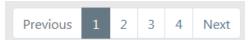
Click the Manage Crashes button to add, update, or delete fleet crash reports.
 For details refer to "Manage Fleet Crash Reports" on page 659.

**Note:** You can also create or manage a Crash Report under the **Manage Vehicles** option.

- Click the Manage Vehicles button to add, update, or delete vehicles. For details refer to "Manage Vehicles" on page 677.
- Click the Manage Equipment button to add, update, or delete equipment associated with vehicles. For details refer to "Manage Equipment" on page 671.
- Click the Go Back button to return to the dashboard.
- 3. You can change the number of entries that appear in the grid. Click on the **Show** Entries ✓ and select 10, 25, 50 or 100. The default is 10.



**4.** The bottom of the window displays the number of entries and it allows you to navigate between pages.



The highlighted number is the page currently being viewed. Click **Next** to advance to the next page, or click the page number you want to view. Click on **Previous** to view the previous page.

5. Each tab allows you to filter the grid data that appears in the grid. Depending on permissions you can filter by agency, assignments, and a specific word or phrase.

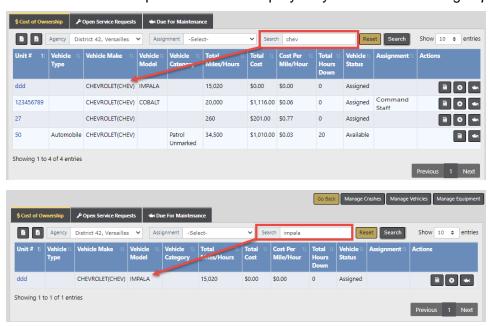


- a. Click on the tab you want to view, if different than the default **Cost of Ownership**.
- b. Select one, two, or all three search options:

- If applicable, optionally select an **Agency** from the list. The results list immediately displays only records pertaining to that selection.
- Optionally, select an Assignment from the list. The results list immediately displays only records pertaining to that selection.
- Optionally, enter text into the Search box, then click the Search button or press Enter to display only records matching the entered text. The displayed list dynamically changes based on the entered text.

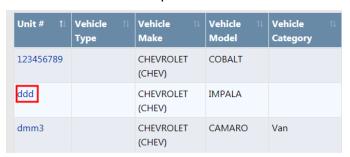
## Search text example:

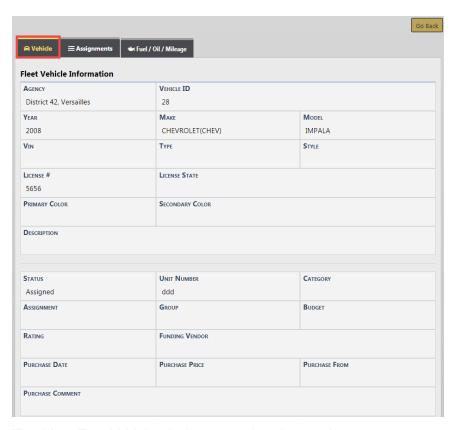
On the **Cost of Ownership** tab enter *Chev* in the text box, then click **Search** or press **Enter** to show only records containing *Chev*. Change the text to *Impala* then click **Search** or press **Enter** to display only records containing *Impala*.



**Note**: Click the **Reset** button to remove the entered search text and list all available records.

c. Click on the **Unit ID** to open the *View Fleet Vehicle* window for detailed information about that particular vehicle.





The View Fleet Vehicle window contains three tabs:



### **Vehicle**

- Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. The *View Heet Window* opens to this tab by default as shown in the above image.

## **Assignments**

- A history of officers or employees who are non-officers assigned to the vehicle, including dates.

## Fuel/Oil/Mileage

- Summarization of fluid types and the dates and costs with mileage.
- d. Click on the **Back** button to return to the **Dashboard**. For your convenience, this button is located on the upper right of the window and on the lower center of the window; either will return you to the **Dashboard**.

## Manage Fleet Crash Reports

The **Manage Crashes** button on the **Fleet Management Dashboard** allows Fleet Managers to Search, Add, Edit, or Delete fleet crash report data.

To update or delete crash reports you must first search for the crash record. Depending on permissions, the search results provide the option to update, delete, or view the crash data. The search page also provides the option to create a new crash report.

**Note:** The **Manage Crashes** button only appears if you have appropriate permissions.

**Note:** With appropriate permissions, you can also create or manage Crashes from the *Edit Fleet Vehicle* screen. Refer to "Edit Vehicles" on page 688 for details.

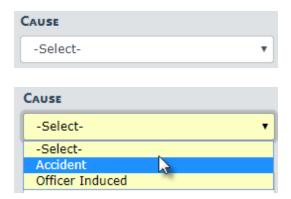
## Search Fleet Crash Reports

- 1. Click on the **Manage Crashes** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. The *Crash Search* screen appears. Enter various pieces of information about the crash report such as, status, cause, dates, crash report number, vehicle id, etc.

**Note**: The Agency of the crash report defaults to the Fleet Manager's agency; however, with proper permissions you can change it to any agency within your organization by selecting from the drop down list.

To add a crash report, click the **Add Crash** button on the top right of the screen. For instructions on adding a crash report refer to "Add Crash Report" on page 661.

The fields with **-Select-** supply a specific list from which to choose. For example, to search for a **Cause** click in the field and select from the drop down list.



The fields with an on the right supply a list of available values based on data you type in the field. For example, click into the **Officer/Employee** field and type a portion of the name to view a list that matches your entered text, then click on an option from the list to populate the Officer/Employee field.



**Note** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

Select any applicable check boxes that apply to the search. For example, select **On Traffic** Stop to search for crash report that pertain to traffic stops.

3. Either click **Reset** to clear all fields to start over, click **Go Back** to return to the Fleet Management dashboard, click **Search** to display a list of existing crashes that match the entered data.

If you selected **Search**, the results display in a grid.



Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over. Click on the Crash Report Number of the crash record to view details, or click on the *View* icon on the right.

4. To export the search results to a file, refer to "Export Search Results" on page 35.

## **Add Crash Report**

Fleet Managers, with proper permissions, have the ability to add crash reports to fleet vehicles.

There are two ways to initiate a new crash report:

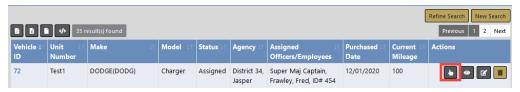
- From the *Crash Search* page.
- From the fleet vehicle record.

Perform the following steps to add a crash report:

- 1. Access the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. Choose one of the following methods to initiate a new crash report:

## From the Crash Search page:

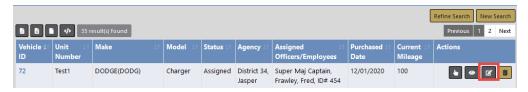
- a. Click on the **Manage Crashes** button on the **Fleet Management Dashboard** to open the *Crash Search* page.
- b. Click on the Add Crash button.
- c. The Vehicle Search page opens.
- d. Search for the vehicle record that you want to associate with the crash report. For more information on searching for a vehicle record, refer to "Search Vehicles " on page 677.
- e. Click the Select icon on the appropriate vehicle record in the results grid to add the vehicle to the new crash report.



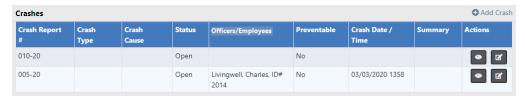
f. The Edit Crash page opens.

#### From the Fleet Vehicle:

- a. Click on the **Manage Vehicle** button on the **Fleet Management Dashboard** to open the *Vehicle Search* page.
- Search for the vehicle record that you want to associate with the crash report.
   For more information on searching for a vehicle record, refer to "Search Vehicles" on page 677.
- c. In the *Heet Vehicle Search Results* grid, click the *Edit* icon on the vehicle you want to associate with the new crash report.



- d. The Edit Vehicle page opens.
- e. On the Edit Vehicle page, page down to the Crashes section of the fleet vehicle record.



- f. Click on the Add Crash link located on the top right of the Crashes section.
- g. Click on the Yes button when asked if you want to continue.
- h. The Edit Orash page appears.
- 3. Enter the relevant information on the Edit Crash page, then click Update.

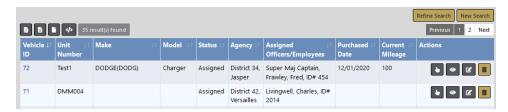
For more information on the *Edit Crash* page, refer to "Edit Crash Report" on the facing page.

## **Delete Crash Report**

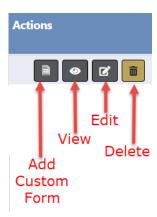
To delete a crash report you must first **Search** for the crash report. The **Search Results** will provide the option to delete.

- 1. Click on the **Manage Crashes** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. The *Crash Search* screen appears. Search for the crash report you want to delete. For instructions on how to search, refer to "Search Fleet Crash Reports" on page 659.

Example of search results:



The icons on the right allow you to Edit, View, or Delete.



**Note**: If you do not see the delete icon, then you do not have appropriate permissions to do so.

3. Click on the trash icon in to delete the appropriate equipment. The confirmation screen appears.



4. Click Yes to delete or No to return to the results window without deleting.

## **Edit Crash Report**

Fleet Managers, with proper permissions, have the ability to edit crash reports.

There are two ways to access the *Edit Crash* page:

- By searching for a specific crash report using the *Crash Search* page.
- From the fleet vehicle itself.

Perform the following steps to edit a crash report:

- 1. Access the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. Choose one of the following methods to access the Edit Crash page:

### From the Crash Search page:

a. Click on the Manage Crashes button on the Fleet Management Dashboard.

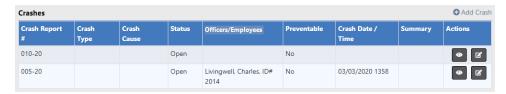
b. The *Crash Search* screen appears. Search for the crash report you want to update. For instructions on how to search, refer to "Search Fleet Crash Reports" on page 659.

Search results example:

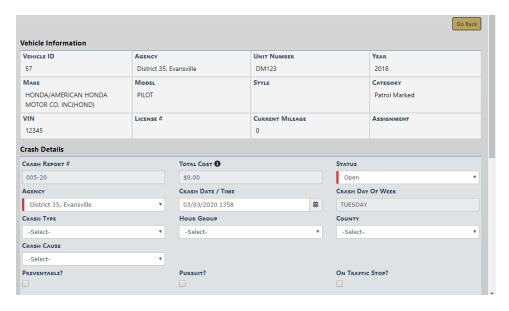


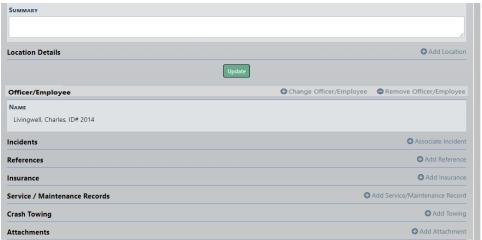
#### From the Fleet Vehicle:

- a. Search for the vehicle and click the edit icon to update the vehicle record. For more information on searching for a vehicle record, refer to "Edit Vehicles" on page 688.
- b. On the Edit Vehicle screen, page down to the Crashes section of the fleet vehicle record.



3. Click the edit icon on the crash report you want to update. The Edit Crash form opens.





**Note:** Data in the *Vehicle Information* section comes directly from the fleet vehicle record and cannot be modified.

**Note: Total Cost** is read-only and it calculates automatically: Tow costs + service/maintenance costs.

#### **Crash Details**

1. Modify the necessary information in the *Crash Details* section, then click the **Update** button to save.

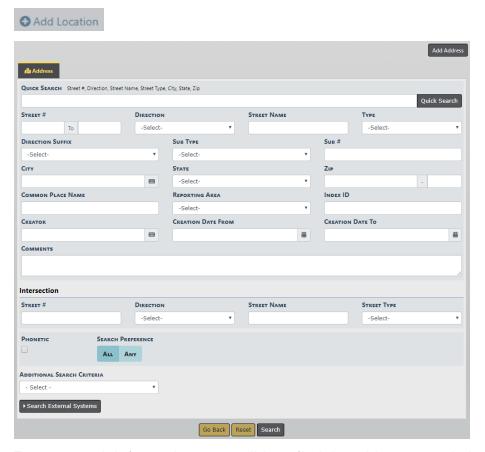
Note: Fields that are grayed-out cannot be modified.

### Location

1. Optionally, search for and choose an existing address.

Note: The location must exist in the Master Address Index. If the location doesn't exist, with proper permissions, you can add it to the Master Address Index then select the newly added record. For more information on Master Index, refer to "Master Indices Overview" on page 81.

a. Click Add Location to open Location Search.



- Enter as much information as possible to find the address record, then click the Search button to display results that match your entered criteria.
  - For more information on searching address records, refer to the *Address Search* section of "Searching Master Records" on page 85.
- c. Click on the select icon to select the appropriate address record that appears in the grid.



## When address you need does not exist:

When the address you are looking for does not exist in the system, you can, with appropriate permissions, add the record then select it.

Click on the **Add Address** button on the top right to add a new address record. If the button does not appear on your screen, then you do not have appropriate permissions.

For more information on adding an address record, refer to "Adding Address" on page 107.

d. The address is added to the Location Details grid of the Crash Report.



- e. Optionally, enter Location Comments then click on the Update button to save.
- f. Click the **Change Location** link to change the address, if applicable. The link open the *Address Search* form.
- g. Click the **Remove Location** link to remove the location and location comment from the grid, if applicable. Then confirm deletion.

## Officer/Employee

- Click on the Add Officer/Employee or Change Officer/Employee link, whichever applies.
- 2. The Assigned Officers/Employee windows appears.



Officers/employees assigned or previously assigned to the vehicle the past twelve months appear in the list.

- 3. Select the appropriate officer/employee from the list provided.
- 4. Click Save.

To remove an officer/employee, click on the delete icon then confirm deletion.

#### Associate Incident

- If applicable, click on the Associate Incident link to associate the crash report with an incident.
- 2. The Incident Search window opens. Enter the search criteria and click the Search button to display the results, then select the appropriate incident from the results grid. For more information on searching for incidents, refer to "Incident Search" on page 266.
- 3. To remove an associated incident from the crash report, click the delete icon then confirm deletion.

If the delete icon is not present, then you do not have appropriate permissions.

**Note:** This removes the association to the incident from the crash report; it does not remove the incident from the system.

## References

1. If applicable, click on the **Add Reference** link to include a reference.



- 2. Select the Reference Type.
- 3. Enter the Reference Number.
- 4. Click **Save** to add it to the crash report.

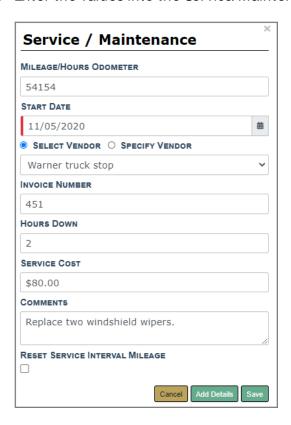
- 5. To edit a reference record, click on the edit icon \_\_\_\_\_, make changes, then click Save.
- **6.** To delete a reference record, click on the delete icon , then click **Yes** to confirm deletion.

#### Insurance

- 1. If applicable, click on the **Add Insurance** link to add insurance to the crash report. The *Insurance* window opens.
- 2. Enter the information, then click Save.

#### Service/Maintenance Records

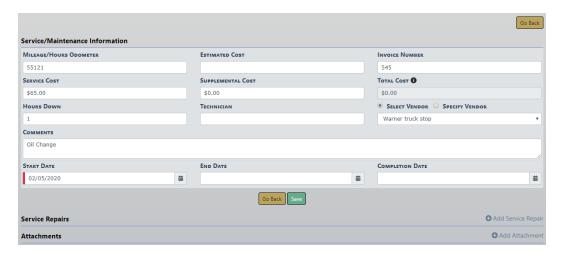
- 1. If applicable, click on the **Add Service/Maintenance** link to add service/maintenance to the crash report. The *Service/Maintenance* window opens.
- 2. Enter the values into the Service/Maintenance window.



**Note:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

For vendor, Select Vendor from a list or click Specify Vendor enter your own.

- Click Save to create the Service Maintenance record, Cancel to return to the Edit Fleet Vehicle window without saving, or click Add Details to add Service Repair records.
- 4. If you chose to Add Details, the Edit Service Record appears.

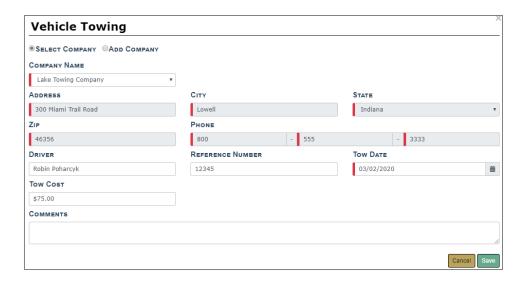


Note: Items specific to crash reports:

- Maintenance records created within a crash report are only visible within the crash report, not in the Service Maintenance grid on the fleet vehicle itself.
- Costs associated with service maintenance records within a crash report are not included in the Cost of Ownership on the fleet vehicle itself.
- Mileage associated with the service maintenance records within a crash report are not used when determining Next Service Mileage and Next Service Date on the fleet vehicle itself.
- 5. To edit an existing service/maintenance record on the crash report, click on the edit icon make changes, then click **Save**.
- **6.** To delete a service/maintenance record from the crash report, click on the delete icon , then click **Yes** to confirm deletion.

## **Crash Towing**

- 1. If applicable, click on the **Add Towing** link to add towing to the crash report. A *Vehicle Towing* window opens.
- 2. You can **Select Company** then choose from a drop-down list, or **Add Company** and complete the necessary information.



- 3. Click **Save** to add the towing record to the crash report.
- To edit an existing towing record on the crash report, click on the edit icon
  make changes, then click Save.
- 5. To delete a towing record from the crash report, click on the delete icon , then click **Yes** to confirm deletion.

## **Attachments**

1. If applicable, click on the **Add Attachment** link to attach a photo or document to the crash report.

For more information on adding attachments, refer to "Add Attachments" on page 67.

For general information about attachments, refer to "Attachments Overview" on page 67.

## Manage Equipment

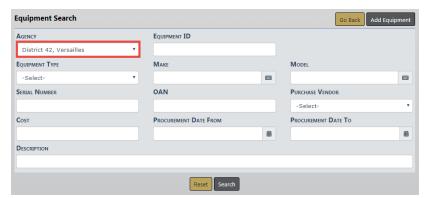
The **Manage Equipment** button on the **Fleet Management Dashboard** allows Fleet Managers to *Search, Add, Edit*, and *Delete* equipment data. Equipment examples are handcuffs, shotguns, radar guns, etc.

To update or delete equipment you must first search for the equipment record. The search results will provide the option to update, delete, or view the equipment data.

## Search Equipment

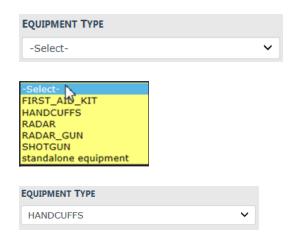
- 1. Click on the **Manage Equipment** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. The **Fleet Equipment Search** screen appears. Enter various pieces of information about the equipment such as, equipment type, make, model, etc.

**Note**: The Agency of the equipment defaults to the Fleet Manager's agency; however, with proper permissions you can change it to any agency within your organization by clicking on the ...



To add equipment click the **Add Equipment** button. For instructions on adding equipment refer to "Add Equipment " on the facing page.

The fields with **-Select-** supply a specific list from which to choose. For example, to search for the **Equipment Type** *Handcuffs*, click on the  $\square$  and a list will appear, then click *Handcuffs* from the list.



**NOTE**: Equipment Types are unique per Organization.

The fields with an on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *Acme* to view a list of

Acme options from which to choose, then click on the option you want and it appears in the **Make** field.



**Note** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

3. Either click Reset to clear all fields to start over, click Back to return to the Fleet Management dashboard, click Search to display a list of existing equipment that matches the entered data, or Add Equipment to add the equipment to the database.

If you selected **Search**, the results display in a grid. The example below is a search result for **Equipment Type** *Handcuffs* and **Agency** *District 42*, *Versalles*.



Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over. Click on the Equipment ID of the equipment record to view details, or click on the *View* icon on the right.

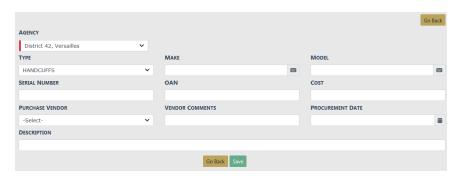
4. To export the search results to a file refer to "Export Search Results" on page 35.

## **Add Equipment**

Fleet Managers have the ability to add equipment to the Fleet Management module by way of the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 654.

- 1. Click on the Manage Equipment button on the Fleet Management dashboard.
- 2. The **Fleet Equipment Search** screen appears. Before adding the equipment, it is recommended you first search for the equipment to verify whether or not it already exists, though not required. For instructions on how to search for equipment refer to "Search Equipment" on the previous page.

3. Click on the **Add Equipment** button on the **Fleet Equipment Search** window. Enter the Equipment information in the fields provided.



- The **Agency** of the equipment defaults to the Fleet Manager's agency; however, you can change it to any agency within the organization by clicking on the ...
- The fields with **-Select-** supply a specific list from which to choose. For example, to search for the **Equipment Type** Handcuffs, click on the  $\checkmark$  and a list will appear, then click Handcuffs from the list.



**Note**: Equipment Types are unique per Organization. The list of available **Styles** dynamically changes based on the chosen **Type**.

• The fields with an on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *Acme* to view a list of *Acme* options from which to choose, then click on the option you want and it appears in the **Make** field.

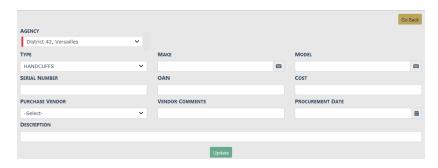


**Note** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

**Note**: The list of available **Models** dynamically changes based on the chosen **Make**.

4. Click **Save** to create the Equipment record, or click **Go Back** to return to the **Fleet Equipment Search** screen without creating the record.

When you select Save, the Edit Equipment screen displays.



5. Click Go Back to return to the Fleet Equipment Search screen.

#### **Delete Equipment**

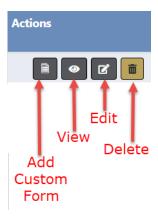
To delete equipment you must first **Search** for the equipment. The **Search Results** will provide the option to delete the equipment data.

- 1. Click on the **Manage Equipment** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. The Fleet Equipment Search screen appears. Search for the equipment you want to delete. For instructions on how to search for equipment refer to "Search Equipment" on page 672.

The results below are based on a search for equipment type Radar.



The icons on the right allow you to Edit, View, or Delete.



3. Click on the trash icon to *Delete* the appropriate equipment. The following confirmation screen appears.



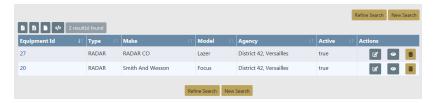
4. Click Yes to delete or No to return to the results window without deleting.

## **Edit Equipment**

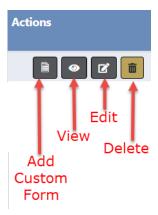
To edit equipment you must first **Search** for the equipment. The **Search Results** will provide the option to edit the equipment data.

- 1. Click on the **Manage Equipment** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. The **Fleet Equipment Search** screen appears. Search for the equipment you want to update. For instructions on how to search for equipment refer to <u>FleetManagerManageEquipSearch.htm</u>.

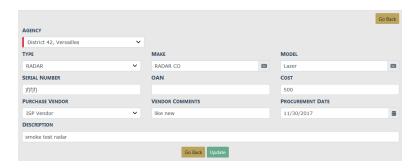
The results below are based on a search for equipment type Radar.



The icons on the right allow you to Edit, View, or Delete.



Click the Edit icon on the equipment record you want to update and the Edit Equipment form opens.



- 4. Modify the necessary information then click the Update button to save.
- 5. Click Go Back to return to the Fleet Equipment Search screen.

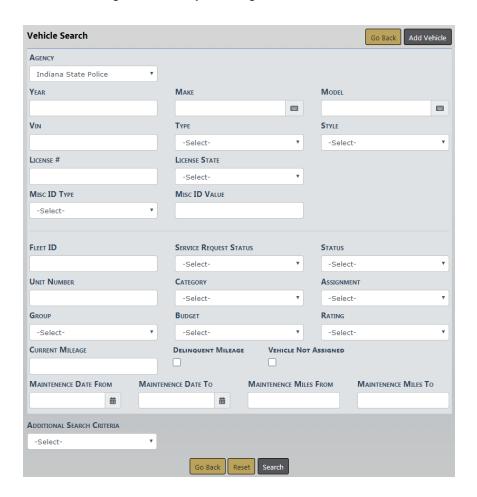
## Manage Vehicles

The **Manage Vehicles** button on the **Fleet Management Dashboard** allows Fleet Managers to *Search, Add, Edit,* and *Delete* vehicle data.

To update or delete vehicles you must first search for the vehicle. The search results provide the option to update, delete, or view fleet vehicle data.

## Search Vehicles

- 1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. The **Fleet Vehicle Search** screen appears. Enter various pieces of information about the vehicle, such as VIN, Make, Model, etc.



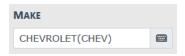
To add a vehicle click **Add Vehicle**. For details refer to "Add Vehicles" on page 684.

The fields with **-Select-** supply a specific list from which to choose. For example, to search for a vehicle **Type** of *Automobile* click on the  $\ \ \ \ \ \ \ \ \ \$  and a list will appear, then click *Automobile* from the list and it appears in the field.



**Note:** The list of available **Styles** dynamically changes based on the chosen **Type**.

The fields with an on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *chev* to view a list of *chev* options from which to choose, then click on the option you want and it appears in the **Make** field.



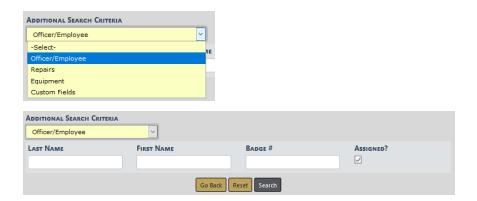
**Note** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

**Note**: The list of available **Models** dynamically changes based on the chosen **Make**.

Check the **Vehicle Not Assigned** checkbox to search for vehicles that have not been assigned.

You can also reduce your search results by including **Additional Search Criteria**, along with your other search parameters or by themself, by using the drop-down list at the bottom left of the *Heet Vehicle Search* screen. For example, you can search for all *Chevrolet* vehicles assigned to officers by selecting **Officer/Employee** in the **Additional Search Criteria** drop-down, then check the **Assigned?** box if not already checked when the name fields appear. You can also optionally add name or badge information. Click **Search** to display the results or click **Reset** to begin the search over.

**Note:** The Officer search option searches both officer and employee records to accommodate assignments where employees are not officers.



You can also search **Custom Fields** if configured by your agency. The **Available Fields** appears; click in the field and choose from the drop-down list.

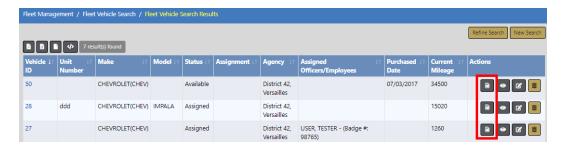


Then enter the **Search Parameter** at the prompt and click **Search**.



**Note**: Custom Fields is available for agencies that have the Custom Fields feature enabled. Custom Fields captures data defined by the agency. For more information refer to your administrator.

3. The search results display.



4. When the search results display, either click **Refine Search** to update your current search criteria or click **New Search** clear all fields to start over.

Click on the **Vehicle ID** of the vehicle record to view details, or click on the View icon on the right.

Click on the Add Custom Forms icon to easily add custom forms to the fleet vehicle.

For more information, refer to "Add Custom Forms to Fleet Vehicle and Assignments" below.

5. To export search results to a file refer to "Export Search Results" on page 35.

## Add Custom Forms to Fleet Vehicle and Assignments

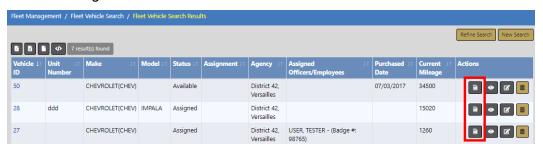
Your agency administrator controls whether or not Custom Forms are available for selection on Fleet Vehicle or Fleet Vehicle Assignments. For more information on availability of Custom Forms, refer to your agency administrator.

#### To Add a Custom Form to a Fleet Vehicle

1. Choose one of the following options.

## Option 1

a. Access Manage Vehicles > Fleet Vehicle Search > Fleet Vehicle Search Results.



For details on accessing Manage Vehicles, refer to "Fleet Manager" on page 654.

- b. Click the Add Custom Forms icon
- c. Select the available Custom Form from the list.



d. Go to Step 2.

## Option 2

a. Access Edit Fleet Vehicle and click on the Vehicle tab, if not already on the tab.



For details on accessing Edit Fleet Vehicle, refer to "Edit Vehicles" on page 688.

b. Page down to the Attached Forms grid then select the form.



c. Go to Step 2.

## Option 3

a. Access Cost of Ownership of Fleet Management.

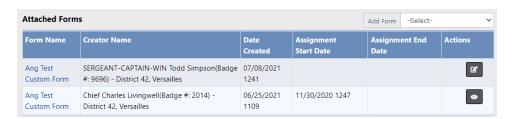


For details on accessing Cost of Ownership, refer to "Fleet Manager" on page 654.

- b. Click the Add Custom Forms icon
- c. Select the available Custom Form from the list.



- d. Go to Step 2.
- 2. The chosen form opens.
- 3. Complete the form and optionally print.
- 4. Click **Save** to save your entry and stay on the form, or click **Save and Exit** to save your entry and close the form.
- If you click Save, a Submit for Review button appears. Click to submit for review if appropriate.
- **6.** The Custom Form record then appears in the **Attached Forms** grid of the fleet vehicle record.



Note: Custom Forms added to the Fleet Vehicle do not have an Assignment Start Date and Assignment End Date, whereas Custom Forms added to the Fleet Vehicle Assignment do.

## To Add a Custom Form to a Fleet Vehicle Assignment:

1. Choose one of the following options:

## Option 1

a. Access Edit Fleet Vehicle, click on the Assignments tab.



For details on accessing Edit Fleet Vehicle, refer to "Edit Vehicles" on page 688.

b. Click the Add Custom Form icon

## Option 2

a. From the Vehicles grid on the Edit Officer Daily Log.



For details on accessing the Officer Daily Log, refer to "Officer Daily Log (ODL) Overview" on page 521.

- b. Click the Add Custom Form icon
- 2. Select the available custom form from the list.

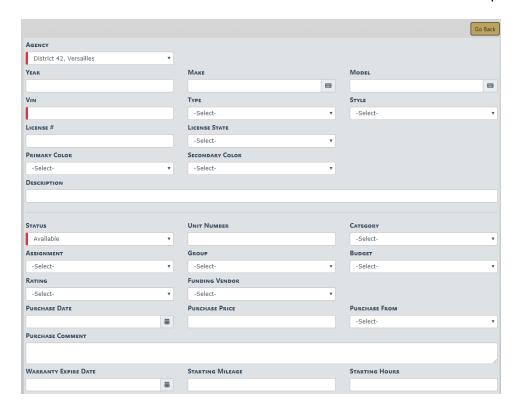


3. Go to "To Add a Custom Form to a Fleet Vehicle" on page 681 and page down to step 2.

#### **Add Vehicles**

Fleet Managers have the ability to add vehicles to the Fleet Management module by way of the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 654.

- 1. Click on the Manage Vehicles button on the Fleet Management dashboard.
- 2. The **Fleet Vehicle Search** screen appears. Before adding the vehicle, it is recommended you first search for the vehicle to verify whether or not it already exists, though not required. For instructions on how to search for vehicles refer to "Search Vehicles" on page 677.
- 3. Click on the Add Vehicle button on the Fleet Vehicle Search window to open the Add Fleet Vehicle screen. Enter the Vehicle information in the fields provided.



**Note:** Custom Fields, if applicable, do not appear until after you add required fields and select the **Save** button. Once the screen refreshes, the custom fields appear for filling in.

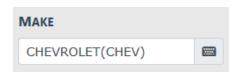
• The **Agency** of the vehicle defaults to the Fleet Manager's agency; however, with appropriate permissions you can change it to any agency within the organization by clicking on the ...

• The fields with **-Select**- supply a specific list from which to choose. For example, to search for a vehicle **Type** of *Automobile* click on the and a list will appear, then click *Automobile* from the list and it appears in the field.



**Note**: The list of available **Styles** dynamically changes based on the chosen **Type**.

• The fields with an on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *chev* to view a list of *chev* options from which to choose, then click on the option you want and it appears in the **Make** field.



**Note** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

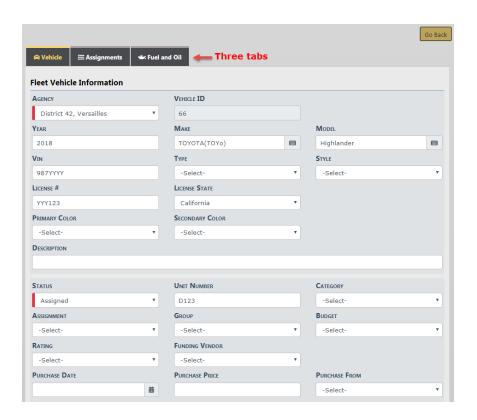
**Note**: The list of available **Models** dynamically changes based on the chosen **Make**.

• You can enter the **Starting Mileage** or **Starting Hours** at time of purchase. This value is used in determining mileage or hours used on the vehicle.

**Note:** The **Status** is required when adding a new vehicle record. Examples are *Assigned*, *Out of Service*, and *Available*; though will vary by agency.

4. Click **Save** to create the Vehicle record, or click **Go Back** to return to the **Fleet Vehicle Search** screen without creating the record.

When you select Save, the Edit Fleet Vehicle screen displays.



There are three tabs: *Vehicle, Assignments*, and *Fuel and Oil*; vehicle information, assignment history of the vehicle, and fuel &oil history, respectively. For managing the information in these tabs refer to "Edit Vehicles" on page 688.

While on the *Vehicle* tab, page down to view or add additional vehicle information in grid format such as attachments, service requests, insurance, inspections, etc. The same general procedure is used for all grid topics, though information will vary. For general instructions refer to "Add a Service Request" on page 699.



**Note:** Custom Fields, if applicable, appear on the screen immediately above the grid section on the *Vehicle* tab. The custom field Test is used as an example.

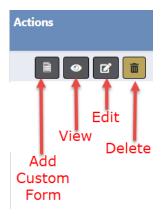


#### **Delete Vehicles**

This applies to users with permissions to delete vehicles.

To delete vehicles you must first **Search** for the vehicle. The **Search Results** will provide the option to delete the vehicle data.

- 1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. Search for the vehicle you want to delete, then in the search results window click the *Delete* icon on the vehicle record you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles" on page 677.



A confirmation window appears. Click Yes to delete or No to return to the search results window without deleting.

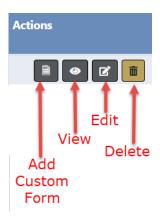


**Note**: If the vehicle is assigned to an officer, the option to delete is not allowed.

#### **Edit Vehicles**

To edit vehicles you must first **Search** for the vehicle. The **Search Results** will provide the option to edit the vehicle data.

- 1. Click on the Manage Vehicles button on the Fleet Management dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. Search for the fleet vehicle you want to update, then in the search results window click the Edit icon on the vehicle record you want to update. For instructions on how to search for vehicles refer to "Search Vehicles" on page 677.

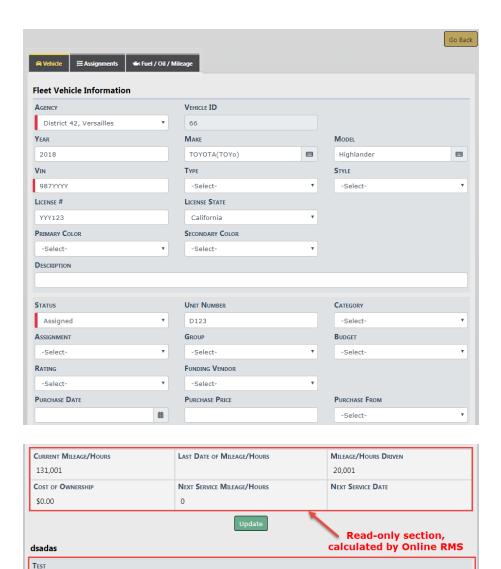


to the vehicle from Fleet Vehicle Search Results You can add a custom form without entering edit mode with appropriate permissions. For more information, refer to "Add Custom Forms to Fleet Vehicle and Assignments" on page 681.

3. The Edit Fleet Vehicle form opens with three tabs that contain vehicle information, past and current officers assigned to the vehicle, and fuel/oil/mileage history.



4. The Vehicle tab opens by default. You can update, add or delete various vehicle information.



**Note:** Custom Fields, if applicable, appear on the screen immediately above the grid section on the *Vehicle* tab. The custom field Test is used as an example.

Add Equipment

**Note:** Cost of Ownership does not include service maintenance records created within a crash report.

**Note:** Be aware of the following crash report items:

Custom Field example

**Equipment** 

- You can create or manage crash reports from the Edit Fleet Vehicle screen.

Click the Add Crash link to create a crash report, or click the edit icon

- on a crash record in the grid to update a crash report. For details on managing crash reports, refer to "Manage Fleet Crash Reports" on page 659.
- Maintenance records created within a crash report are only visible within the crash report, not in the Service Maintenance grid on the fleet vehicle itself.
- Costs associated with service maintenance records within a crash report are not included in the Cost of Ownership on the fleet vehicle itself.
- Mileage associated with the service maintenance records within a crash report are not used when determining Next Service Mileage and Next Service Date on the fleet vehicle itself.
- Yo

Click the Go Back button to return to the Fleet Vehicle Search Results window, if you wish.

5. Modify the necessary vehicle information on the top half of the form, then click the Update button to save.

Note: If you modify the VIN number, a message displays asking if you would like to continue.

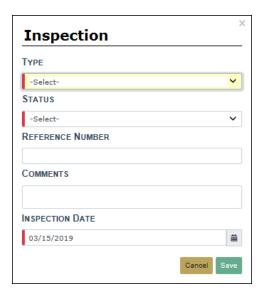


6. Add, edit, or delete additional vehicle information that appears in grids below the **Update** button. While the instructions below only show one example, a similar method applies to all grid sections.

#### Add Additional Vehicle Information

a. To add, click on the  $\oplus$  button in the grid next to the item you want to add. Enter the necessary data in the window that appears.

For example, to add Inspection data, click on the button next to Add Inspection and the following window appears:



b. Enter the necessary data then click **Save** to add, or **Cancel** to exit and return to the previous screen.

## **Edit Additional Vehicle Information**

a. Click on the edit Icon to the right of the item you want to update.



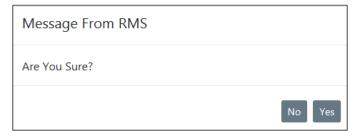
- b. An Inspection window appears displaying the current information for that item.
- c. Update as needed then click **Save** to apply the updates, or **Cancel** to return to the **Edit Fleet Vehicle** window without saving.

#### **Delete Additional Vehicle Information**

a. Click on the trash can icon to the right of the item you want to delete.



b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Fleet Vehicle** window without deleting.



## **Vehicle Assignments**

You can assign vehicles to officers or employees, regardless if they have a user account or not.

Click on the Assignments tab to add, edit, and delete officer/employee assignments.



With permissions, you can click to quickly add a custom form to the fleet vehicle from the Assignments tab. For more information, refer to "Add Custom Forms to Fleet Vehicle and Assignments" on page 681.

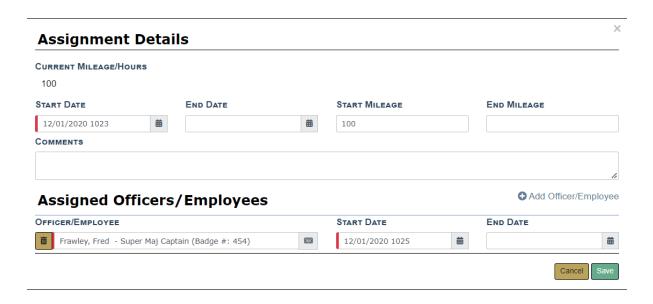
**Note**: New Assignments cannot be created on a vehicle with a **Status** of *Sold* or *Out of Service*. A cannot assign message displays if you try to assign a vehicle that is no longer available.



2. Officers/employees can be assigned two ways: Edit an existing assignment, or add a new assignment.

## Add a New Assignment

a. Click on **\*** Add Assignment to create a new assignment and enter the necessary data in the window that appears as shown below.



If you enter an **End Date**, the date flows into the **End Date** field that is located under Offer Assignment.

Note: You must enter at least one officer.

b. As you enter the officer name, a list of names appear. Click on the appropriate officer name.

For example, if you enter the letters **ch**, a list will appear with all officers that contain the letters **ch** anywhere in their name. Click on the appropriate officer name to fill in the Officer field.

The dates of the officer must be within the dates of the Assignment. The officer **Start Date** will default to the Assignment start date, but it can be changed.

- A warning displays if the officer is assigned to the same vehicle at the same time or the officer has more than one open assignment.
- A list of officers assigned to this vehicle displays if they conflict with the new assignment.
- c. Click on **add** Officer/Employee to add additional officers to the assignment, if any.
  - You can assign an officer or an employee who is not an officer.
  - A list of vehicles the officer/employee is assigned to displays if they conflict with the new assignment.
- d. Click Save to create the assignment, or click Cancel to return to the Assignments Tab without saving.

## Edit an Existing Assignment

**Note:** If given the *always-edit assignment* permission, you can edit assignments that were created by other users; otherwise, you can only edit those that are created by you.

- a. Locate the Assignment you would like to edit, then click on the edit icon to display the Officer/Employee Assignment window.
- b. Update the necessary information, such as Start Mileage, Comments, etc. If the Vehicle Assignment contains an **End Date**, that date flows into the Officer Assignment **End Date** field.
  - Starting mileage is entered at the time of assignment and ending mileage when the assignment is complete.
  - A warning displays if the assignment date overlaps with existing assignments.
- c. Click on Add Officer/Employee to add additional officers/employees, if applicable. Multiple offficers/employees can be added. You can assign employees who are not officers.
- d. Enter the **End Date** to end an Assignment for an officer, if applicable.
- e. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.

**Note**: Creating a new Assignment updates the Status of the vehicle to Assigned.

**Note**: Assigned vehicles display to the officer in the Daily Log module.

**Note**: Additional officers added to the Daily Log must also be added manually to the Assignment within Fleet Management. Refer to "Officers" on page 527 for more Daily Log information.

#### **End Assignments**

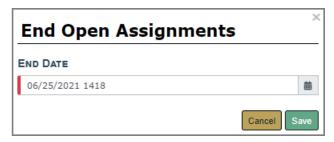
To close an entire Assignment, you must enter the **End Date** for all officers as well as the Assignment itself.

1. Click on the **Assignments** tab, then click the edit icon on the **Assignment** you want to close.



You can also end open assignments quickly. Click on the End Open Assignments icon





This ends any open assignments for officers assigned to the vehicle.

2. Enter the End Date.

**Note**: The officer/employee End Dates must be on or before the Vehicle Assignment End Date. Also, ending an Vehicle Assignment updates the Status of the vehicle.

3. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.

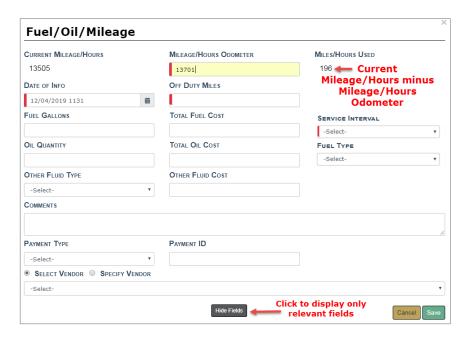
## Manage Fuel, Oil, Mileage

Vehicle Fuel, Oil, and Mileage are managed under the Fuel/Oil/Mileage tab on the Edit Fleet Vehicle screen.



## Add a New Record

- Click on Add Fuel / Oil / Mileage Record on the Fuel/Oil/Mileage tab to add a new record.
- 2. Enter the relevant information.



**Note:** The **Current Mileage** displayed on the *Vehicle Tab* looks at service maintenance records (excluding crash report service maintenance records) and fuel/oil/mileage records to find the max mileage entered for the vehicle.

Optionally, click the **Hide Fields** button to display only relevant fields for which you need to supply data.



Click the **Show Fields** button to display all hidden fields.

Note: A permission category controls the default look is this screen. If the permission category is assigned, then you see all the fields with a **Hide**Fields button; otherwise, only a portion of the fields appear with the
Show Fields button.

- The Current Mileage/Hours and Mileage/Hours Odometer fields are both read-only.
- Fields with a down arrow supply a list of values from which to choose. Click on the field then choose from the list that appears.
- If applicable, the **Vendor** gives you the option to *Select* a value from a list, or *Specify* your own Vendor. Click on one of the options, then select or enter your answer in the text field provided.

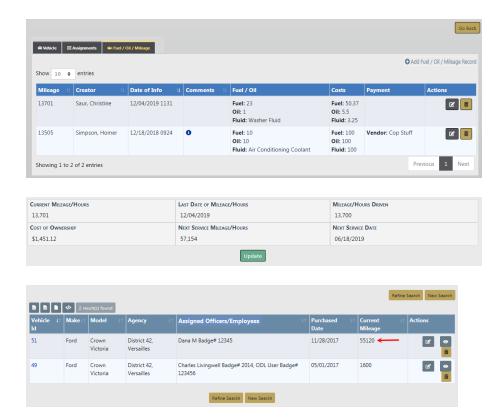
# Select a Vendor Example:



- Click Save to apply the changes, or click Cancel to return to the Fuel/Oil/Mileage Tab without saving.
- 4. The record appears under the Fuel/Oil/Mileage Tab of the Edit Fleet Vehicle screen.

**Note:** The **Current Mileage** displayed on the *Vehicle Tab* looks at service maintenance records (excluding crash report service maintenance

records) and fuel/oil/mileage records to find the max mileage entered for the vehicle.



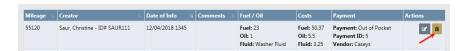
#### Edit a Record

**Note:** If given the *always-edit fuel & Oil* permission, you can edit records that were created by other users; otherwise, you can only edit those that are created by you.

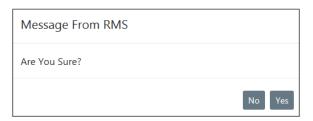
- 1. Click on the edit icon and apply the necessary updates.
- Click Save to apply the changes, or click Cancel to return to the Fuel/Oil/Mileage Tab without saving.

#### Delete a Record

1. Click on the trash can icon to delete a record.



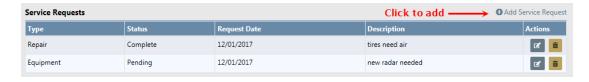
2. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Fuel/Oil/Mileage** window without deleting.



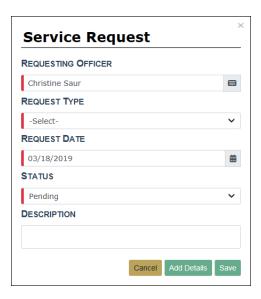
## Add a Service Request

To add a **Service Request** to a vehicle you must first **Search** for the vehicle, then edit the vehicle in the **Search Results** window.

- 1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. Search for the vehicle you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles" on page 677.
- In the search results window, click the edit icon on the vehicle that needs the Service Request.
- 4. Click on the *Vehicle* tab of the **Edit Fleet Vehicle** window, page down until you see the **Service Requests** grid, then click **Add Service Request**.



5. Enter the values in the Service Request window.

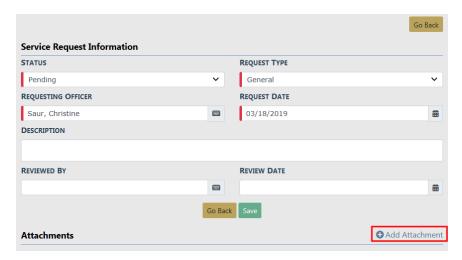


**Requesting Officer** defaults to the current user, but can be changed if the user is a Fleet Manager.

A notification is sent to all Fleet Managers when the Service Request is saved.

6. Click Save to create the Service Request, Cancel to return to the Edit Fleet Vehicle window without saving, or click Add Details to add Attachments to the Service Request.

If you clicked the **Add Details** button, a *Service Request Information* window appears where you can add attachments.



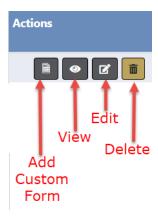
**Note**: Attachments are added to a temporary holding place or queue; you must then upload the files to the Service Request record.

For detailed instructions on adding attachments, refer to "Add Attachments" on page 67.

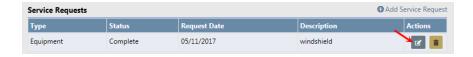
# Edit a Service Request

To edit a Service Request that is associated to a vehicle you must first **Search** for the vehicle, then edit the vehicle in the **Search Results** window.

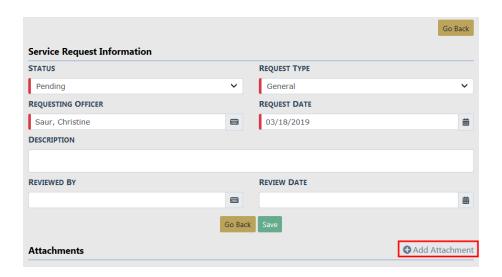
- Click on the Manage Vehicles button on the Fleet Management dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. Search for the vehicle associated with the **Service Request**. For instructions on how to search for vehicles refer to "Search Vehicles" on page 677.
- Click the edit icon on the vehicle record that is associated with the Service Request.



4. Page down to the **Service Request** section on the **Edit Fleet Vehicle** window, then click on the edit icon on the **Service Request** record you need to update.



5. Make the necessary updates in the **Edit Service Request** window.



**Note**: You can also delete, edit, or download attachments. For more information on attachments refer to "Attachments" on page 67.

6. Click **Save** to update the record, or click **Go Back** to return to the **Edit Fleet Vehicle** window without saving.

## Approve a Service Request

To approve a **Service Request** the Fleet Manager may take action on the **Service Request Notification**, or edit the vehicle and select the *Edit* icon for the **Service Request**.

# Take Action on a Service Request Notification

When new notifications arrive, the total number of Notifications appear in red near the top right of the screen.

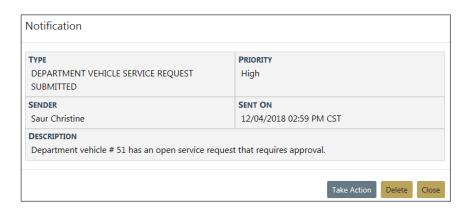
1. Click on the red notification indicator to view the list of Notifications and Broadcast messages.

For more information on accessing Notifications, refer to "Notifications" on page 23.

1. Click on the **Notification** tab, then click on the appropriate Service Request Notification to take action.

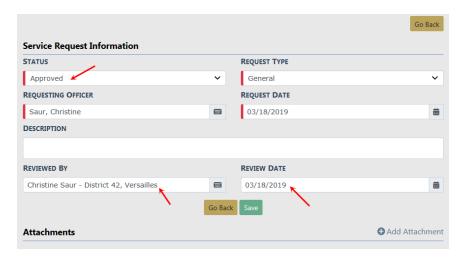


2. Click the **Take Action** button. You may also click on the **Print** icon to print the Notification.



**Note:** A warning message appears if you have already viewed or taken action on the Notification. Click **Yes** to **Take Action** or **No** to exit without taking action.

If you chose to Take Action the Edit Service Request screen appears. Change the Status to Approved, enter the Reviewed By and Review Date.

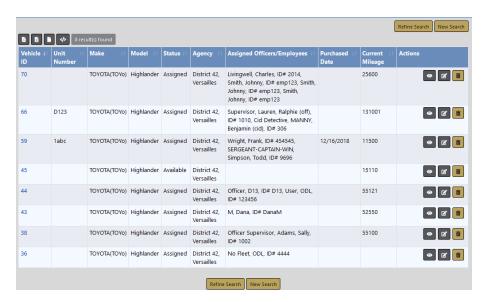


- 4. Click **Save** to Approve then click **Go Back** to the **Edit Fleet Vehicle** window. Or click **Go Back** to abort the change without saving.
- 5. If you chose to save, a **Notification** is sent to the **Requested by User**.

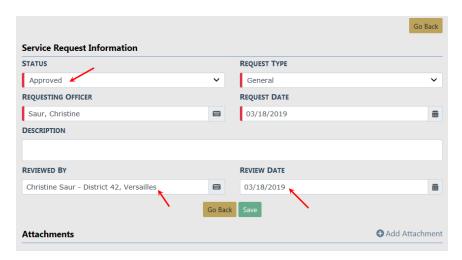
#### Edit the Vehicle

 Click on the Manage Vehicles button on the Fleet Management dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654. 2. The **Fleet Vehicle Search** screen appears. Search for the vehicle you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles" on page 677.

The results below are based on a search for a Toyota Highlander.



- 3. Click the edit icon on the vehicle that needs Service Request approval.
- 4. Page down to the Service Request section, and click the edit ☑ icon associated with the Service Request.
- 5. Change the Status to Approved, enter the Reviewed By and Review Date.



 Click Save to Approve then click Go Back to the Edit Fleet Vehicle window. Or click Go Back to abort the change without saving. If you chose to save, a **Notification** is sent to the **Requested by User** upon approval of the Service Request. The **Requested by User** then clicks on the Notification and opens the details to **Review**, **Reply**, or **Take Action**.

## Complete a Service Request

After the Service Request has been approved and the maintenance has been done satisfactory, the Service Request should be marked complete. To complete a **Service Request** the Fleet Manager can associate the **Service Request** to a **Service Maintenance** record, or edit the vehicle and select the Edit icon for the **Service Request**. Change the Status on an existing Service Request.

Note: For detailed instructions on associating the Service Request to a Service Maintenance record, refer to "Add Service Maintenance and Repair" on page 707.

## Change the Status on an existing Service Request:

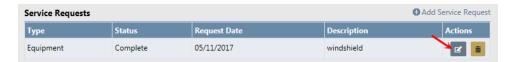
- 1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- The Fleet Vehicle Search screen appears. Search for the vehicle you want to delete.
   For instructions on how to search for vehicles refer to "Search Vehicles" on page 677.

The results below are based on a search for a Toyota Highlander.

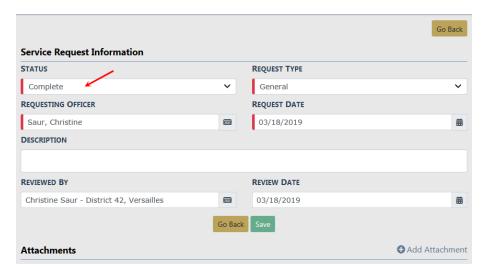


3. Click the edit icon on the vehicle that needs Service Request approval.

**4.** Page down to the Service Request section, and click the edit icon associated with the Service Request.



5. Change the Status to Complete.



6. Click **Save** to Complete then click **Go Back** to the **Edit Fleet Vehicle** window, or click **Go Back** without saving to abort the change.

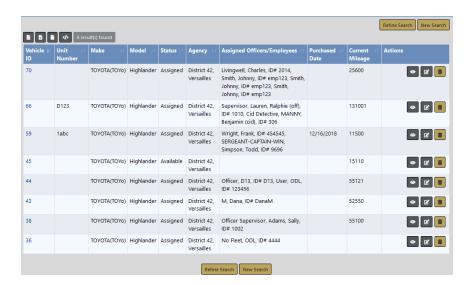
Note: Completing a Service Request removes it from the Open Dashboard.

## **Delete Service Requests**

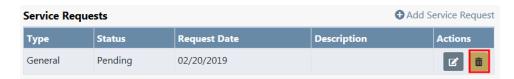
To delete service requests you must first **Search** for the vehicle that is tied to the service request. The **Search Results** will provide the option to delete the service request record.

- 1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. The **Fleet Vehicle Search** screen appears. Search for the vehicle you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles" on page 677.

The results below are based on a search for a Toyota Highlander.



- 3. Identify which vehicle is associated with the service requests and click on the edit icon.
- 4. Page down to the Service Requests section and click on the Delete icon to delete.



5. A confirmation message appears.



6. Click Yes to delete or No to return to the results window without deleting.

Note: Deleting a Service Request also removes it from an associated Service Maintenance record.

#### Add Service Maintenance and Repair

**Service Maintenance** records reflect the total service cost associated to an invoice, and **Service Repair** records reflect detailed costs of that invoice.

For example, a **Service Maintenance** record contains the total invoice amount of \$100 for invoice number 1234, and there are two **Service Repair** records (tire repair \$50 and oil change \$50) that equal \$100 for invoice number 1234.

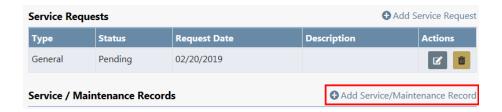
To add a Service Maintenance record to a vehicle you must first Search for the vehicle, then edit the vehicle in the Search Results window.

- Click on the Manage Vehicles button on the Fleet Management dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. The Fleet Vehicle Search screen appears. Search for the vehicle. For instructions on how to search for vehicles refer to "Search Vehicles" on page 677.

The results below are based on a search for a Toyota Highlander.

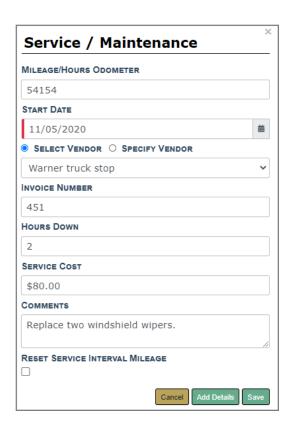


- 3. Click the edit icon on the vehicle that needs the Service Maintenance.
- 4. Page down and click Add Service/Maintenance Record on the Edit Fleet Vehicle window.

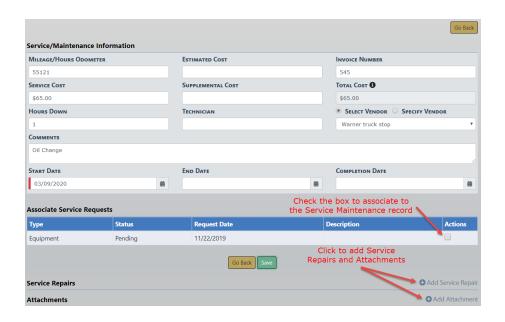


Service Maintenance records then appear in the grid as shown above. You can edit or delete the Service Maintenance records.

5. Enter the values in the Service/Maintenance window.



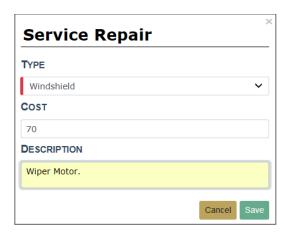
- The Vendor gives you the option to Select a value from a list, or Specify your own Vendor. Click on one of the options, then select or enter your answer in the text field provided.
- Reset Service Interval Mileage
  - Leave this box empty If you would like to record services without resetting mileage. Example is when a tire is changed.
  - Check this box if you would like Online RMS to use the mileage of this service maintenance record to determine the Next Service Mileage displayed on the View and Edit Vehicle screens, as well as, use on the Due for Maintenance Dashboard. Example is when the oil is changed.
  - This option is not available for service maintenance records created as part of a crash report.
- 6. Click Save to create the Service Maintenance record, Cancel to return to the Edit Fleet Vehicle window without saving, or click Add Details to add Service Repair records.
- 7. If you chose to **Add Details**, the *Edit Service Record* appears. Select the Associate Service Requests, if applicable.



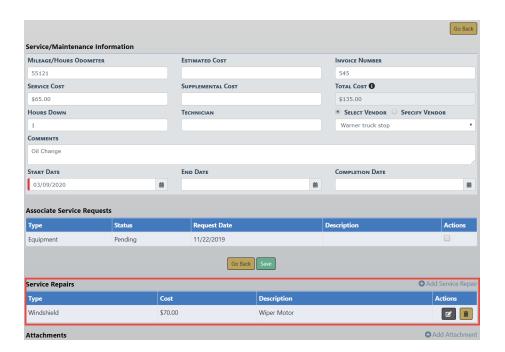
Note: The Fleet Manager can associate none, one, or multiple Service Requests to the Service Record. All selected Service Requests will become marked as Complete.

**Note:** Total Cost is read-only and calculates automatically: Service cost + supplemental costs + repair costs.

8. Click Add Service Repair to enter repair types and costs associated with the Service Maintenance record, if any.



9. Click **Save** to create the Service Repair record. **Service Repair** records then appear in the grid as shown above. You can edit or delete the **Service Repair** records.



10. Click Add Attachment to include images or documents to the Service Maintenance record, if any.



For more information on adding attachments, refer to "Add Attachments" on page 67.

11. Click Save, or click Go Back to return to the Edit Fleet Vehicle window. Both pending and approved Service Requests can be associated with a Service Maintenance Record.

Note: A Service Request can be associated with only one Service Maintenance Record.

**Note:** All selected **Service Requests** will become marked as **Complete**.

## **Update Service Maintenance and Repair**

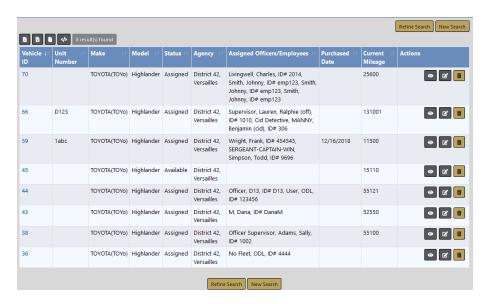
**Service Maintenance** records reflect the total service cost associated to an invoice, and **Service Repair** records reflect detailed costs of that invoice.

For example, a **Service Maintenance** record contains the total invoice amount of \$100 for invoice number 1234, and there are two Service Repair records (tire repair \$50 and oil change \$50) that equal \$100 for invoice number 1234.

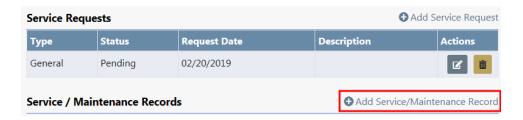
To update a Service Maintenance record to a vehicle you must first Search for the vehicle, then edit the vehicle in the Search Results window.

- Click on the Manage Vehicles button on the Fleet Management dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 654.
- 2. The Fleet Vehicle Search screen appears. Search for the vehicle. For instructions on how to search for vehicles refer to "Search Vehicles" on page 677.

The results below are based on a search for a Toyota Highlander.

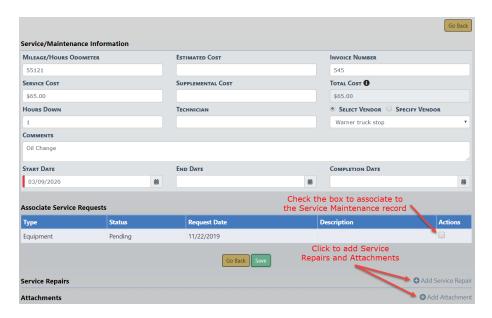


- 3. Click the edit icon on the vehicle that needs the Service Maintenance updated.
- 4. Page down to the Service/Maintenance Records section of the Edit Fleet Vehicle window.



Service Maintenance records then appear in the grid as shown above. Select the on the maintenance record you want to update.

5. Make the necessary updates in the **Service/Maintenance Information** window. You may also add **Service Repair** records and **Attachments** (for detailed instructions refer to the "Add Service Maintenance and Repair" on page 707 section).



Note: The Fleet Manager can associate none, one, or multiple Service Requests to the Service Record. All selected Service Requests will become marked as Complete.

6. Click the **Save** button to save your changes, then click **Go Back** to return to the **Edit Fleet Vehicle** window.

# Mid-Level Fleet Manager Overview

By having the **Mid-Level Fleet Manager** permission category, you can perform everything the Fleet Manager can do in the **Fleet Manager** module, except for the following:

- Cannot add vehicles.
- Cannot edit the primary vehicle fields.
- Cannot edit any custom fields associated with the vehicle.

For a permission category breakdown, refer to "Fleet Management Permission Categories" on page 653.

# Fleet Officer

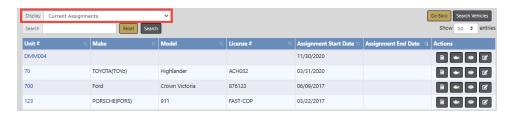
By having the Fleet Officer permission category, you can perform the following in the Fleet Management module:

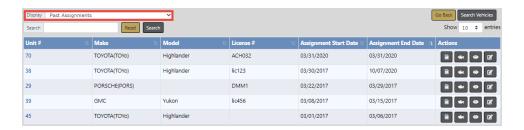
- View fleet vehicles currently or previously assigned to you.
- Search all vehicles regardless of the assignees.
- Assign a vehicle to yourself or add yourself to an existing assignment.
- You can create and edit Fuel & Oil records and Service Requests to your assigned vehicle.
- You can delete or edit Fuel/Oil/mileage records that you have created, but not records created by others.
- You can add an existing custom form to the vehicle.
- Add attachments to your assigned vehicle.

Note: Only Fleet Managers and Administrators have the ability to add, update, and delete Fleet Vehicles.

Below is an overview of the basic functionality:

- 1. Click on the Records Management menu then Fleet Management sub-menu to open the Fleet Management page.
- 2. Click the Manage Vehicles button to access Fleet Vehicle Assignments.
- 3. Vehicles *Currently assigned* to you display by default. You also have the option to change the Display to view vehicles previously assigned to you.





You may also search all vehicles, regardless of the officer assignment. Click on the **Search Vehicles** icon to display the **Fleet Vehicle Search** window.

For details on searching all vehicles refer to "Search All Vehicles" on page 717.

4. You can change the number of entries that appear in the grid. Click on the **Show**Entries ✓ and select 10, 25, 50 or 100. The default is 10.

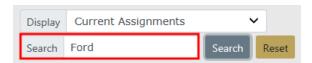


- 5. Click the to view the record or to edit.
- 6. Click the icon, if available, to quickly add a custom form to the fleet vehicle without entering edit mode in step 5.

**Note:** This icon displays only when custom forms are available to add to the assignment.

For details on adding a custom form, refer to "Add Custom Forms to Fleet Vehicle and Assignments" on page 681.

- 7. Click the icon to quickly add Fuel/Oil/Mileage, if available, instead of entering edit mode in step 5.
  - a. The Fuel/Oil/Mileage form opens.
  - b. Complete the form then click Save.
  - c. The Fuel/Oil/Mileage record then appears on the fleet vehicle record.
- **8.** You can also optionally **Search** or filter Vehicle Assignments to return a list that only matches the entered text.



Enter the text you want to search on in the Search text box, then click the Search button or press Enter to display only records matching the entered text. The displayed list dynamically changes based on the entered text. For example, enter Ford to list only vehicles that contain the word Ford. Click Reset to remove the entered text and display all vehicles.

9. Click Go Back to return to the Records Management menu, from which to access the different Online RMS modules.

For information on **Records Management**, refer to "Records Management Button" on page 41.

#### View Vehicle

Click the **View** icon to view a particular vehicle record and the associated information. Information in the View Fleet Vehicle window is read-only and cannot be changed.

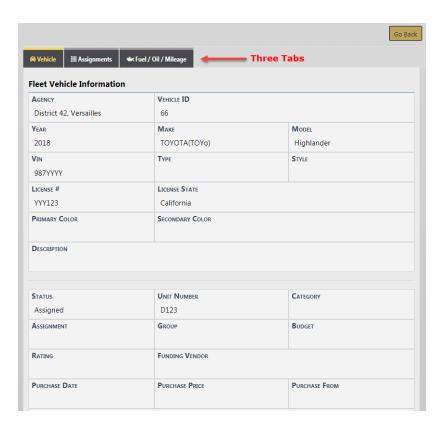
The View Fleet Vehicle window contains three tabs:



- Vehicle
  - Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. The View Fleet Window opens to this tab by default as shown in the above image.
- Assignments
  - A history of officers assigned to the vehicle, along with the dates.
- Fuel and Oil
  - Summarization of the type of fluids put in the vehicle, along with the dates.

Click on the Back button to return to the Fleet Vehicle Assignments window. For your convenience, this button is located on the upper right of the window and on the lower center of the window.

Click on the download icon in the *Attachment* section of *Vehicle* tab to download available documents or photos.



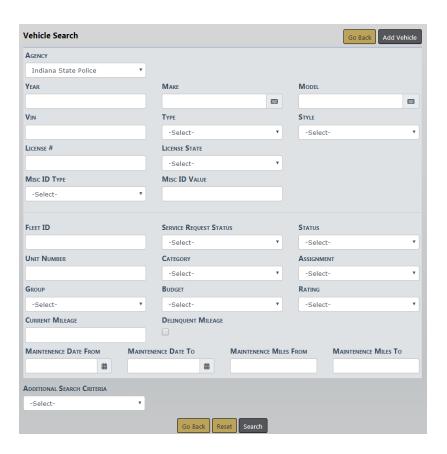
# Search All Vehicles

1. Click the Search Vehicles button on the Fleet Vehicle Assignments window.



2. The **Fleet Vehicle Search** screen appears. Enter various pieces of information about the vehicle, such as VIN, Make, Model, etc.

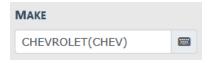
**Note:** The Agency of the vehicle defaults to the Agency of the logged in user; however, you can change it to any agency within the organization by clicking on the .



The fields with **-Select-** supply a specific list from which to choose. For example, to search for a vehicle **Type** of *Automobile* click on the  $\boxed{\ }$  and a list appears, then select from the drop-down list that appears.



The fields with an on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *chev* to view a list of *chev* options from which to choose, then click on the option you want and it appears in the **Make** field.



**Note** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

 Either click Reset to clear all fields to start over, click Go Back to return to the Fleet Vehicle Assignments window, or click Search to display a list of existing vehicles that match the entered data.

If you selected **Search** the results are displayed in a grid. The example below is a search result for **Make** *Toyota*(*Toyo*) and **Model** *Highlander* and **Agency** *District* 42, *Versalles*.

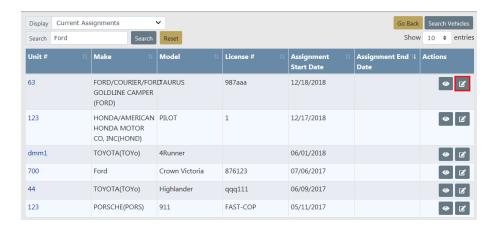


Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over, or click **Go Back** to return to the **Fleet Vehicle Assignments** window. Click on the Vehicle ID of the vehicle record to view details, or click on the *View* icon on the right as shown below.

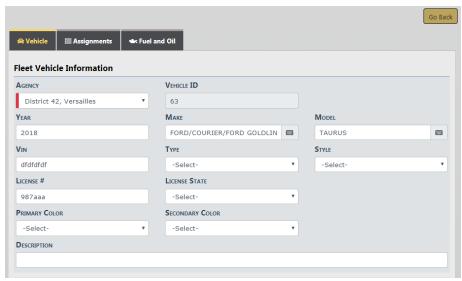
4. To export search results to a file refer to "Export Search Results" on page 35.

# Add or Update Overview

By having the **Fleet Officer** permission category, you can add, update, or delete *Fuel & Oil, Service Requests*, and *Attachments* to vehicles you are assigned. On the **Fleet Vehicle Assignments** window locate the vehicle you want to update, then click the edit icon.



# The **Edit Fleet Vehicle** window appears.



The **Edit Fleet Vehicle** window contains three tabs:



## Vehicle

- Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. This tab opens by default.
- You can add, update, or delete Service Requests and Attachments from this tab on records created by you.

## Assignments

A history of officers assigned to the vehicle, along with the dates. You can
assign yourself to the vehicle, and update assignment dates and mileage on
records created by you. You can also delete records created by you.

#### Fuel and Oil

- A summary of the type of fluids put in the vehicle, along with the dates. Access this tab to add, update or delete fuel and oil records.

Click on the Go Back button to return to the Fleet Vehicle Assignments window.

# **Add and Update Attachments**

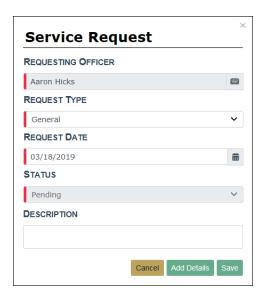
Click on the appropriate icons to Add, Edit, Delete, and Download Attachments.



For more information on adding, editing, and deleting attachments, refer to "Attachments" on page 67.

# Add a Service Request

1. From the **Edit Fleet Vehicle** window, click on the *Add Service Request* link to open the **Service Request** window.



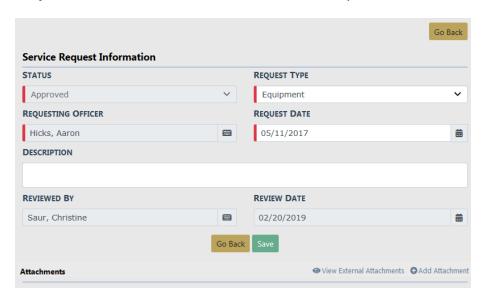
Select the Request Type, Request Date, and enter a Description.

Note: The Requesting Officer and Status cannot be changed.

2. Click **Save** to save the **Service Request** or click **Add Details** to add images and attachments. Click **Cancel** to exit without saving.

Note: Service Request attachments do not appear in the Attachments grid of the Edit Fleet Vehicle window. To view Service Request attachments you must open the Service Request.

3. If you chose to **Add Details**, enter the necessary information on the **Edit Service**Request screen then click **Add Attachment** to upload files.



Note: Requesting Officer defaults to the current user and can only be changed by the Fleet Manager. The Status, Reviewed By and Review Date cannot be changed.

A notification is sent to the Fleet Manager when the **Service Request** is saved.

For further instructions on adding Attachments refer to "Add and Update Attachments" on the previous page.

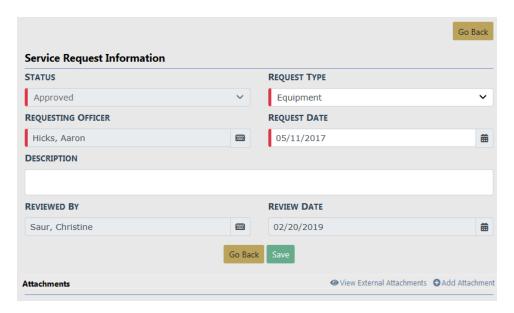
## **Update Service Requests**

1. From the **Edit Fleet Vehicle** window, locate the **Service Request** record to update and click the edit **!** icon.



Note: You can update Service Requests that were created by you. The edit icon does not display on Service Requests that have been set up by someone else.

2. Modify the values as needed.



Note: The Requesting Officer, Status, Reviewed By and Review Date cannot be changed.

- 3. Click **Save** to save the updated information, or click **Go Back** to return to the previous screen without saving the updates.
- **4.** Optionally add, edit or delete Attachments. For detailed instructions refer to "Add and Update Attachments" on page 721.

#### **Delete Service Requests**

1. From the **Edit Fleet Vehicle** window, locate the **Service Request** to delete then click the Delete icon ...



**Note**: You can delete **Service Requests** that were created by you. The Delete icon does not display on **Service Requests** that have been set up by someone else.

For further details on how to delete refer "Delete Data" on page 731.

## Manage Fuel, Oil, and Mileage

By having the **Fleet Officer** permission category, you can add, update, or delete *Fuel/Oil/Mileage* records that are assigned to you. However, the ability to update or delete may vary, depending on whether or not your agency is utilizing the lock hours feature, or you always have edit fuel and oil permissions.

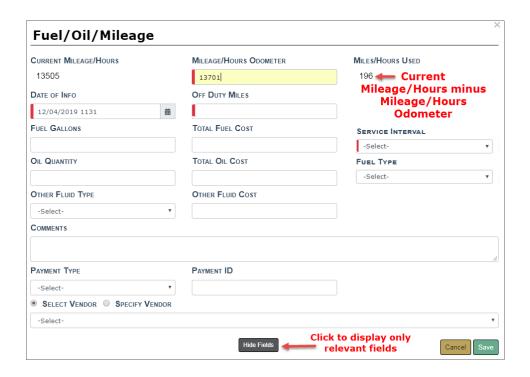
For example, when the lock hours are set to 100, you can edit the record if you are the creator, and today is within 100 hours of record creation.

**Note:** Fleet Managers may update and delete fuel, oil & Mileage records, regardless of the configured lock hours.



#### Add Fuel, Oil, and Mileage

1. Click on Add Fuel / Oil / Mileage Record on the Fuel/Oil/Mileage tab to add a new record, then enter the relevant information.



**Note:** The **Current Mileage** displayed on the *Vehicle Tab* looks at service maintenance records (excluding crash report service maintenance records) and fuel/oil/mileage records to find the max mileage entered for the vehicle.

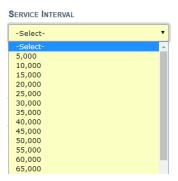
Optionally, click the **Hide Fields** button to display only relevant fields for which you need to supply data.



Click the **Show Fields** button to display all hidden fields.

- The Qurrent Mileage/Hours and Miles/Hours Used fields are both read-only.
- Fields with a down arrow supply a list of values from which to choose. Click on the field then choose from the list that appears.
- If applicable, the **Vendor** gives you the option to *Select* a value from a list, or *Specify* your own Vendor. Click on one of the options, then select or enter your answer in the text field provided.

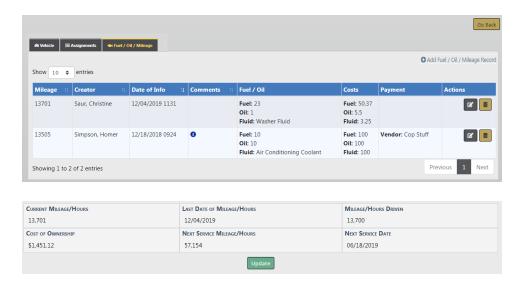
Service Interval allows you to select the number of miles until the next service.
 The list values are configured by the agency. For details, refer to your administrator.



- Click Save to apply the changes, or click Cancel to return to the Fuel/Oil/Milage tab without saving.
- The record appears under the Fuel/Oil/Mileage tab of the Edit Fleet Vehicle screen.

The **Current Mileage** displayed on the **Vehicle Tab** reflects the *Mileage* entered on the most recent Fuel and Oil record, and on the **Fleet Vehicle Search Results** screen.

The **Cost of Ownership** displayed on the **Vehicle Tab** reflects the *Purchase Price* + *All Fuel & Oil Costs* + *All Service Maintenance Costs* entered for the vehicle.



## Edit Fuel, Oil, and Mileage

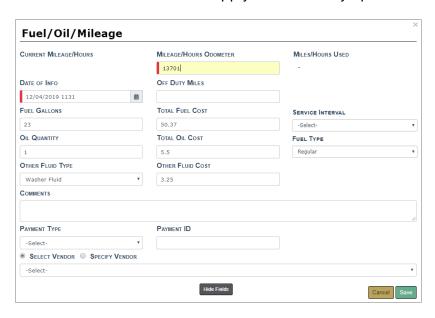
You can edit fuel, oil, and mileage records under the following conditions:

 You are the creator of the record and the system time is within the configured lock hours of the creation date.

For example, when the lock hours are set to 100, you can edit the record if you are the creator, and today is within 100 hours of record creation.

For more information on lock hours, refer to your agency administrator.

- Or, you always have edit fuel, oil, and mileage permissions.
- 1. Click on the edit **II** icon and apply the necessary updates.



**Note**: As a Fleet Officer you cannot update or delete **Fuel**, **Oil**, **Mileage** records created by another user.

Optionally, click the **Hide Fields** button to display only relevant fields for which you need to supply data.

Click Save to apply the changes, or click Cancel to return to the Fuel/Oil/Mileage Tab without saving.

#### Delete Fuel, Oil, Mileage

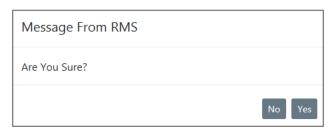
You can delete records under the following conditions:

 You are the creator of the record and the system time is within the configured lock hours of the creation date.

For example, when the lock hours are set to 100, you can delete the record if you are the creator, and today is within 100 hours of record creation.

For more information on lock hours, refer to your agency administrator.

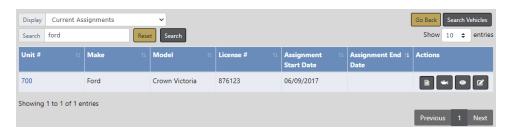
- Or, you always have delete fuel/oil/mileage permissions.
- 1. Click on the delete icon 🔳 to delete a Fuel/Oil/Mileage Record.
- 2. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Fuel/Oil/Mileage** window without deleting.



#### Self-Assign Vehicles

As Fleet Officer you can assign yourself to vehicles that are not on your **Current Assignment** list by searching for the vehicles first.

1. Click the Search Vehicles button on the Fleet Vehicle Assignments window list.



- 2. Enter the vehicle details into the Fleet Vehicle Search window then click Search. For detailed instructions on how to search for vehicles refer to "Search All Vehicles" on page 717.
- 3. Click the edit icon to the right of the vehicle in the Fleet Vehicle Search Results window you want to assign.

**Note**: Vehicles with a status of *Sold* or *Out of Service* cannot be edited by an officer.

With permissions, you can click to quickly add a custom form to a fleet vehicle from the *Fleet Vehicle Search Results*. For more information, refer to "Add Custom Forms to Fleet Vehicle and Assignments" on page 681.

4. Click on the Assignments tab from the Edit Fleet Vehicle window.

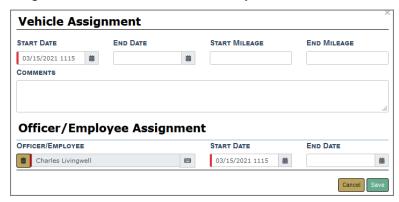


Click Go Back to return to the Fleet Vehicle Search Results window, if you wish.

5. Officers can be assigned two ways: Add yourself to new or existing assignment.

### Add Yourself to a New Assignment

a. Click on **a** Add Assignment on the **Edit Fleet Vehicle** window to create a new assignment and enter the necessary data.



The **Officer/Employee** defaults to you and cannot be changed.

- b. Enter your Start Date if different than the default.
- c. Click **Save** to create the assignment, or click **Cancel** to return to the **Assignments Tab** without saving.

## Add Yourself to an Existing Assignment

- a. Locate the Assignment in the **Edit Fleet Vehicle** window, then click the edit con to display the *Officer/Employee Assignment* window.
  - The bottom **Officer/Employee** defaults to you and cannot be changed. Other fields in gray cannot be changed.
- b. The **Start Date** defaults to the current date but may be changed.
- c. Enter the **End Date** and **Comments**, if applicable.

**Note**: To end the Assignment, there must be an **End Date** on the Assignment itself.

d. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.

**Note:** You can create or edit *Fuel and Oil* and *Service Requests* for the vehicle once you have assigned yourself to the vehicle. For details refer to "Manage Fuel, Oil, and Mileage" on page 724.

Your new assignment puts the vehicle in ODL and sets status to *Assigned*. The new assignment also appears in your **Current Assignments** window.

## End Self-Assignments

To close an entire Assignment that you assigned to yourself, you must enter the **End Date** on both the *Vehicle Assignment* and *Officers/Employee Assignment* sections. You cannot close an Assignment that was created by another user.

Note: The End Dates must be on or before the Assignment End Date.

6. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.

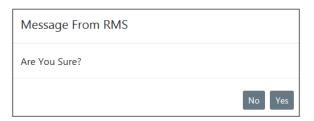
## Delete Assignments

You may delete assignments that are created by you, and only when you are the only officer on the assignment.

1. Locate the assignment to delete then click on the Delete icon .

**Note**: You do not have the authority to delete assignments without a Delete icon under the *Actions* column.

2. A confirmation window appears. Click **Yes** to delete or **No** to exit without deleting.

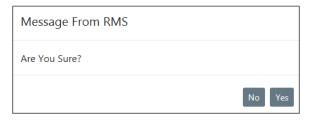


#### Delete Data

Click the Delete icon to delete records that were created by you. If the Delete icon does not exist, then you do not have the ability to delete. While Service Requests are used in the example below, the same procedure applies to other areas of the application.



The following confirmation screen appears.



Click **Yes** to delete or **No** to return to the previous window without deleting.

#### Fleet Clerk

By having the **Fleet Clerk** permission category, you can perform the following in the **Fleet Management** module:

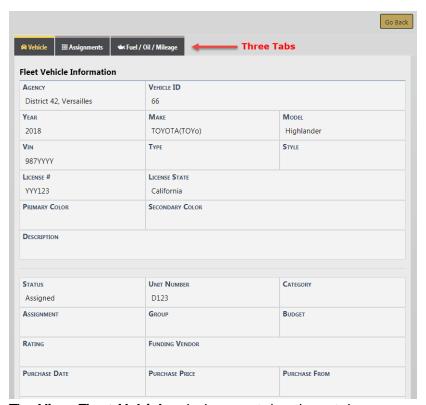
- View fleet vehicles.
- You can add fuel, oil & mileage records to fleet vehicle records.
- You can edit fuel, oil & mileage records only if you are the creator and only within the lock hours.

**Note:** Fleet Managers and Administrators have the ability to add, update, and delete Fleet Vehicles that were created by others if given appropriate permissions.

To access Fuel, Oil, & Mileage:

 Click on the Records Management menu then Fleet Management sub-menu to open the Fleet Vehicle Search page. 2. Search for and select the Vehicle.

**Note:** For more information on searching and selecting, refer to "Search Vehicles" on the facing page.



The View Fleet Vehicle window contains three tabs:



#### Vehicle

- Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. This tab opens by default.

#### Assignments

- A history of officers assigned to the vehicle, along with the dates.

## Fuel/Oil/Mileage

- A summary of the type of fluids put in the vehicle with dates, along with mileage. Access this tab to add records, or update records if you are the creator and only if within the lock hours.

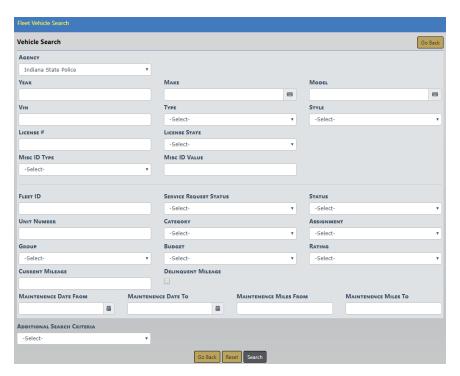
Note: The Vehicle and Assignment tabs are read-only.

Click on the **Fuel/Oil/Mileage** tab to add, update, or delete records. Refer to "Search Vehicles" below for details.

Or, click on the Go Back button to return to the previous window.

## Search Vehicles

 Click on the Records Management menu then Fleet Management sub-menu to open the Fleet Vehicle Search page.



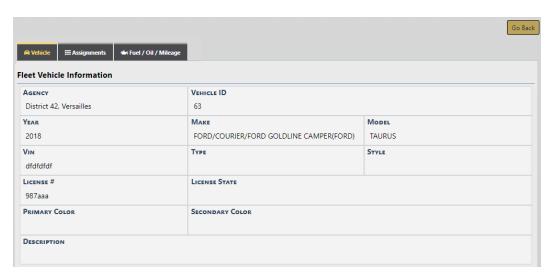
**Note:** The Agency of the vehicle defaults to the Agency of the logged in user; however, you can change it to any agency within the organization by clicking on the  $\square$ .

2. Enter various pieces of information about the vehicle, such as VIN, Make, Model, etc., then click **Search** to display the results.



## Add Fuel, Oil, and Mileage

1. Locate the vehicle you want to edit then click on the Edit icon in the Actions column of the Search Results window to open the Edit Fleet Vehicle page.



Click on the Fuel/OilMileage tab, then click Add Fuel/Oil/Mileage Record to add a new record.

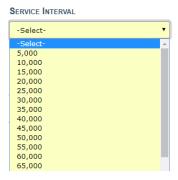




Only relevant fields for which you need to supply data display automatically.

Click the **Show Fields** button to display all available fields.

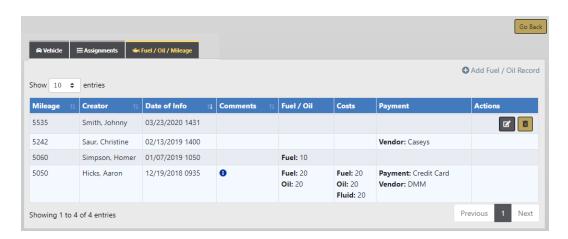
- The Current Mileage/Hours and Miles/Hours Used fields are both read-only.
- Fields with a down arrow supply a list of values from which to choose. Click on the field then choose from the list that appears.
- Service Interval allows you to select the number of miles until the next service.
   The list values are configured by the agency. For details, refer to your administrator.



- Click Save to apply the changes, or click Cancel to return to the Fuel/Oil/Mileage tab without saving.
- 4. If you chose to click **Save**, the record appears under the **Fuel/Oil/Mileage** tab of the **Edit Fleet Vehicle** screen.

The **Current Mileage** looks at service maintenance records and fuel/oil/mileage records to find the max mileage entered for the vehicle.

The **Cost of Ownership** displayed on the **Vehicle Tab** reflects the *Purchase Price* + *All Fuel & Oil Costs* + *All Service Maintenance Costs* entered for the vehicle.



The *Edit* and *Delete* icons appear on fuel/oil/mileage records to which you have appropriate permissions.

## Edit Fuel , Oil, and Mileage

You can edit records under the following conditions:

 You are the creator of the record and the system time is within the configured lock hours of the creation date.

For example, when the lock hours are set to 100, you can edit the record if you are the creator, and today is within 100 hours of record creation.

For more information on lock hours, refer to your agency administrator.

- Or, you always have edit fuel and oil permissions.
- 1. Click on the edit icon and apply the necessary updates.
- Click Save to apply the changes, or click Cancel to return to the Fuel/Oil/Mileage Tab without saving.

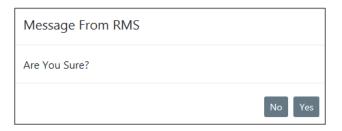
## Delete Fuel , Oil, and Mileage

You can delete records under the following conditions:

 You are the creator of the record and the system time is within the configured lock hours of the creation date. For example, when the lock hours are set to 100, you can delete the record if you are the creator, and today is within 100 hours of record creation.

For more information on lock hours, refer to your agency administrator.

- Or, you always have delete fuel and oil permissions.
- 1. Click on the delete icon in to delete a Fuel/Oil/Mileage Record.
- 2. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Fuel/Oil/Milage** window without deleting.



# **Chapter 33. Lost and Found Property**

## **Lost and Found Property Overview**

The **Lost and Found Property** module allows you to create, save, and edit *Master Property* records and mark them as lost. The **Lost and Found Property** module is included with the full subscription of Online RMS, though it is disabled for initial deployment. Please contact Caliber Support if your agency would like this module enabled.

When the module is enabled, user access is controlled by permissions configured by your administrator. For more information on permissions see your administrator.

This module utilizes the **Master Property Index**, where property data is represented only once for consistency. **Master Property** data is easily transferred to a new **Lost and Found Property** record by searching the **Master Property Index** for the appropriate property record. For more information on **Master Indicies** refer to "Master Indices" on page 81.

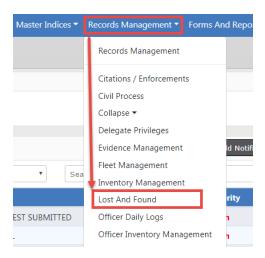
Lost and Found Property can be created and managed two ways within Online RMS:

- From the Standalone Module by selecting the Lost and Found option under the Records Management Menu.
- **Incident Lost and Found Property** (similar to logging property as evidence or held property).

## Standalone Module

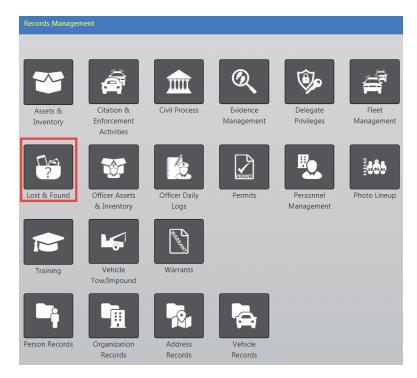
There are two ways to access the **Lost & Found** Standalone Module:

Click the Records Management Menu then click the Lost and Found submenu option.

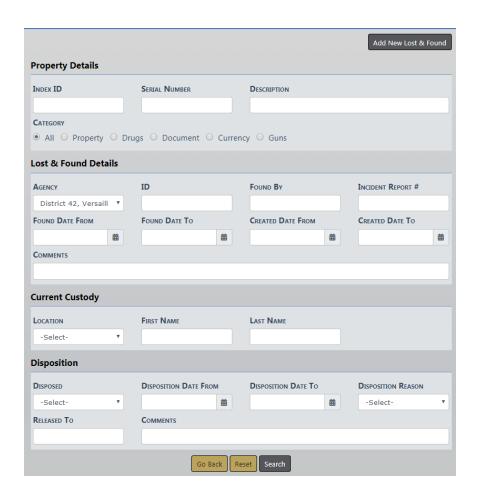


• Click on the Records Management Menu then click on the Lost & Found link.





The *Property Lost & Found Search* screen appears. Click on the **Add New Lost & Found** button to create a new **Lost & Found** record if necessary.

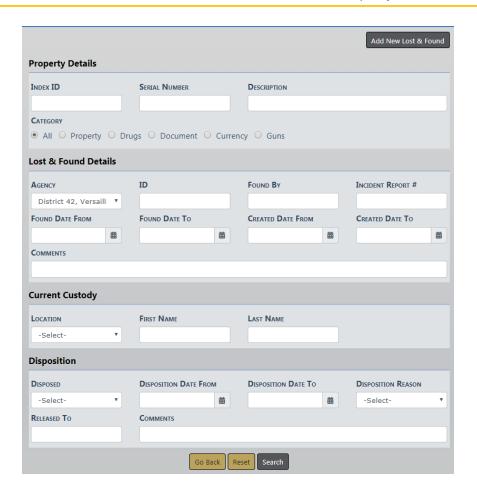


For more information on searching  ${f Lost}$  &  ${f Found}$  records refer to "Search Lost and Found Property" below .

## Search Lost and Found Property

Access the **Lost & Found** Standalone Module to begin the search. For more information on accessing the module refer to "Standalone Module" on page 739.

The Property Lost & Found Search screen appears.



Choose one **Category** to display additional search fields. The search fields change based on the selected **Category**.



Enter all search criteria then click the Search button to view the Search Results.



Click **New Search** to start a new search, or **Refine Search** to modify your search.

You can **Export** the *Search Results* to a file by clicking on one of the export icons. For more information on exporting *Search Results* refer to "Export Search Results" on page 35.

From the Search Results window you can handle one record, or multiple records at once.

## Specific Record

Dispose, Edit, or Delete a specific record.



If an icon does not appear in the *Actions* column then you do not have proper permissions to perform that *Action*. For example, if the **Dispose** icon does not appear then you do not have permissions to **Dispose** that record. For more information on permissions refer to your administrator.

## Multiple Records

Online RMS provides a function to process multiple **Lost & Found** records at once. **Mass Dispose**, **Mass Change Custody**, and **Print Labels** buttons appear when one or more records on the *Property Lost & Found Search Results* screen are selected. Click one of the three buttons to process all selected records.



For more information on processing records in bulk refer to "Mass Lost and Found Functions" on page 752.

## Add Lost and Found Property

Before you add a new record, first search to ensure it doesn't already exist. For more information on searching, refer to "Search Lost and Found Property" on page 741

The search results displays a message when the record you are searching for does not exist.

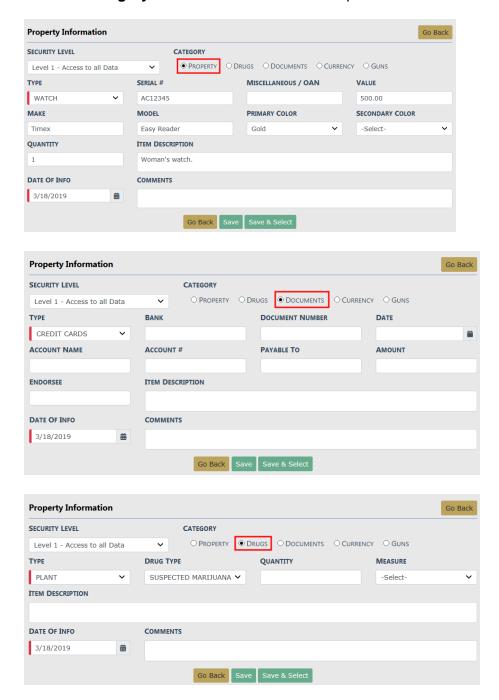


## Create a New Master Property Index Record

If the record you are searching for does not appear in the Lost & Found Search Results then it's likely it does not exist in the index, so you need to create it.

Click on the **Add New Lost & Found** button on the top right of the *Lost & Found Search Results* window to display the *Add Property* screen.

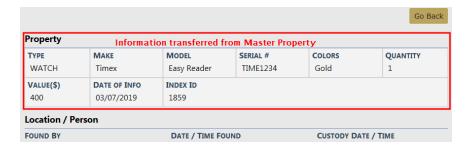
Choose one **Category** on the *Add Property* screen. Additional fields appear based on the selected **Category** as shown in the below examples.



Enter the necessary data, then click **Save & Select** to transfer the newly added record to a new *Lost & Found* record.

## Create the Property Lost & Found Record

The new property record you just created transfers into the **Add Property Lost & Found** screen.



Enter the remaining lost and found information then click **Save** to open the *Edit Lost* & *Found* screen.

For more information on editing lost and found records, refer to "Edit Lost and Found Property" below.

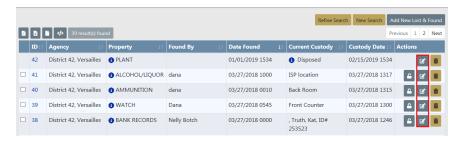
## **Edit Lost and Found Property**

Access the **Lost & Found** Standalone Module then search for the record(s) you want to **Edit**.

For more information on accessing the Standalone Module refer to "Standalone Module" on page 739.

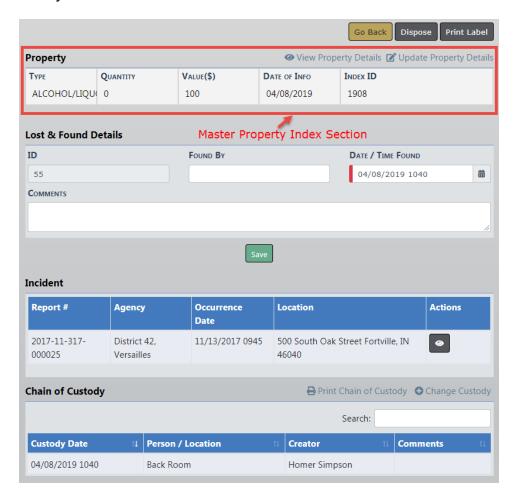
For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 741.

From the Search Results window click on the Edit icon on the record you want to update.



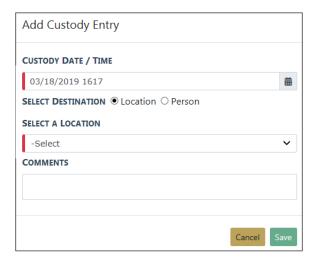
**Note: Disposed** records cannot be updated unless you have *Edit Disposition Information* permissions. For more information on permissions refer to your administrator.

The Edit Property Lost & Found screen appears. The Master Property information appears on the top section, Lost & Found Property information on the middle section, and Chain of Oustody information on the bottom section.



With the proper permissions, you can click on the **View Property Details** or **Update Property Details** link to **View** or **Edit** the *Master Property Index* record respectively. For more information on permissions refer to your administrator.

Click on the **Change Custody** link to display the *Add Custody Entry* screen.



Select either Location or Person.

- If you selected **Location** then select a Location from the displayed list.
- If you selected **Person** then enter part of the officer's name in the text box and select the appropriate name that appears in a list.

#### Select Save.

You can also Dispose the selected record, or Print Label.



**Note:** For more information on how to **Dispose** a record refer to "Dispose Lost and Found Property" on the facing page.

## **Delete Lost and Found Property**

Access the **Lost & Found** Standalone Module then search for the record(s) you want to **Delete**.

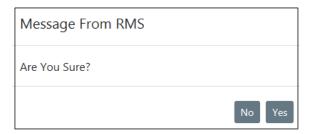
For more information on accessing the Standalone Module refer to "Standalone Module" on page 739.

For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 741.

From the Search Results window click on the **Delete** icon in the Actions column on the record you want to delete.



A confirmation window appears.



Click Yes to delete or No to return to the Search Results window without deleting.

## **Dispose Lost and Found Property**

Dispose is considered the end of life for the Lost & Found record(s).

Access the **Lost & Found** Standalone Module then search for the record(s) you want to **Dispose**.

For more information on accessing the Standalone Module refer to "Standalone Module" on page 739.

For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 741.

From the Search Results window you can **Dispose** multiple records at once, or a specific record.



## Dispose Multiple (Mass) Records

Select all records you want to **Dispose**, then click the **Mass Dispose** button.



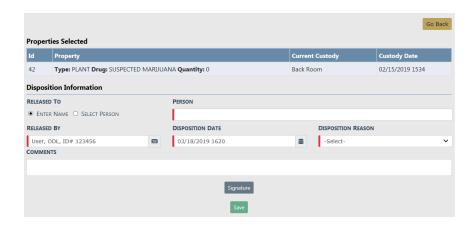
For more information on the mass functions refer to "Mass Lost and Found Functions" on page 752

## Dispose a Specific Record

Locate the record you want to **Dispose** of then click the **Dispose** icon to display the *Lost* & *Found Disposition* screen.



**Note:** If the **Dispose** icon does not appear then you do not have proper permissions to perform that *Action*.



Enter the necessary data in the fields provided.

 Click Enter Name of the person to whom the property will be released and enter their name in the text box, OR click Select Person then click on Select Person to choose a name from the Master Person Index.



For more information on the Master Person Index refer to MASTERINDICES.htm.

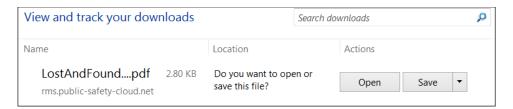
- Released By name defaults to the logged in user; however, it can be changed.
- Disposition Date and Time defaults to the current data and time; however, it can be changed.
- Select a Disposition from the list.
- Enter any Comments.
- If required by your agency, click on the Signature button for signature.

Click Save to display a successful confirmation message.



Click the **Print Receipts** button to print receipts, or click **Exit** to return to the *Search Results* screen without printing receipts.

If you chose to **Print Receipts** then you click **Open** to print, **Save** for more options, or **Cancel** to return to the *Search Results* screen.



**Disposed** appears on the property record in *Search Results*. Hover your mouse over or click on the blue circle to display detailed **Disposed** information.



## Mass Lost and Found Functions

Mass Lost and Found Functions allow you to process Lost & Found records in bulk. There are three bulk (mass) functions available:

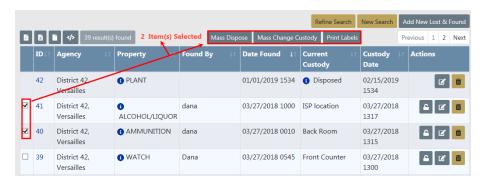
- Dispose
- Change Custody
- Print Labels

To process records in bulk, access the **Lost & Found** Standalone Module then search for the record(s) you want to process in bulk.

For more information on accessing the Standalone Module refer to "Standalone Module" on page 739.

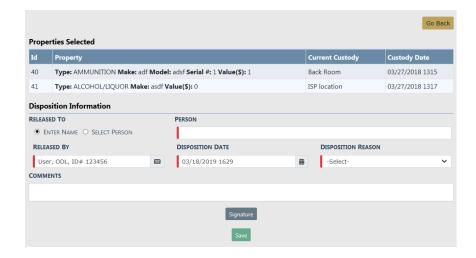
For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 741.

From the Search Results window select one or more records you want to process, and with the proper permissions, Mass Dispose, Mass Change Custody, and Print Labels buttons appears.



## Mass Dispose

After selecting one or more records in the Search Results screen, click on the Mass Dispose button to display the Lost & Found Disposition screen.



Enter the necessary data in the fields provided.

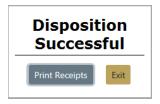
 Click Enter Name of the person to whom the property will be released and enter their name in the text box, OR click Select Person then click on Select Person to choose a name from the Master Person Index.



For more information on the Master Person Index refer to MASTERINDICES.htm.

- Released By name defaults to the logged in user; however, it can be changed.
- **Disposition Date** and **Time** defaults to the current data and time; however, it can be changed.
- Select a **Disposition** from the list.
- Enter any Comments.
- If required by your agency, click on the **Signature** button for signature.

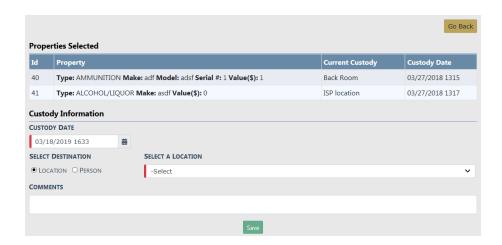
Click **Save** to display a successful confirmation message.



**Note: Disposed** records cannot be updated unless you have *Edit Disposition Information* permissions. For more information on permissions refer to your administrator.

## Mass Change Custody

After selecting one or more records in the Search Results screen, click on the Mass Change Custody button to display the Mass Change Custody screen.



Enter the necessary data in the fields provided.

- Click Location and select the location from the list, OR click Person then enter part of the officer's name and choose the appropriate name from the list that appears.
- The Customer Date and Time defaults to the current date and time. You can change it if necessary.
- Enter any Comments.

#### Click Save.

**Note:** Online RMS creates a new *Chain of Custody* with the entered information for each selected **Lost & Found** property record.

#### Print Labels

After selecting one or more records in the *Search Results* screen that need a label, click the **Print Labels** button.

## **Incident Report Lost and Found**

**Lost & Found** property can be created from the *Property & Vehicles* tab on the *Incident Report* and marked as **Lost & Found**. You can choose to single or mass properties.

**Note:** The **Lost & Found** module must be turned on for your agency to utilize this module and functionality.



For more information on Lost & Found from the *Property & Vehicles* tab on the *Incident Report* refer to "Property & Vehicles Tab" on page 223.

# Chapter 34. Expungements

# **Expungements Overview**

When an agency is required to expunge a record, the specifics on what needs to be expunged are contained in the court order.

Note: Please refer to your agency's policy on Expunging Records.

This document provides suggestions for accommodating the expungement order by deleting or modifying records contained in Online RMS.

## If the order specifies an offender on an incident report:

With appropriate permissions, you can expunge the offender from the report using the Offender incident expungement workflow. For workflow details, refer to "Expunge Offender or Arrestee" on page 761.

## If the order specifies an arrest:

With appropriate permissions, you can expunge an arrest record by using the Arrest Expungement process. For details, refer to "Expunge Field Arrest" on page 766.

# If the order specifies to delete an Incident Report, Arrest, and all related information:

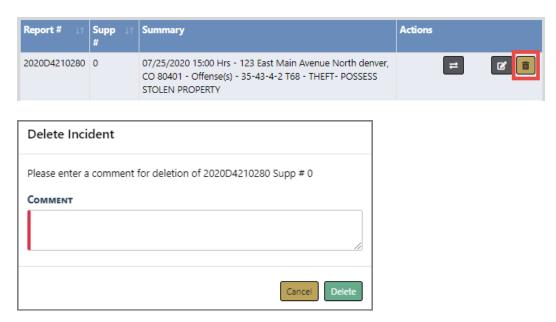
It is easy to locate the Incident, and Arrest reports then delete them from Online RMS. When creating the delete comment, it may be beneficial to cite the court order.

## **Incidents**

Incident reports must be in Initial status to allow for deletion:

 If the report is in Approved status, refer to "Changing Incident Status" on page 273 for detailed instructions on changing the status to Initial. For detailed instructions on deleting an Incident report, refer to "Delete Initial Incident Report" on page 279.

Below illustrates how to delete an initial report from Recent Activities, and the required comment dialog box:



**Note:** Deleted reports are not recoverable from the database.

#### Field Arrests/Citations/Field Contacts

If ordered, users with authority can delete Field Arrests, Citations, and Fleld Contacts using similar steps as with Incidents by first querying for the record.

To delete Field Arrests, refer to "Delete Field Arrest" on page 384.

To delete Citations, refer to "Delete Citation" on page 558.

To delete Field Contacts, refer to "Delete a Field Contact" on page 403.

## **Investigative Case**

If there is a follow-up Investigative Case associated with the Incident report, the delete process automatically removes the Incident from the associated Investigative Case.

 The associated Investigative Case should also be reviewed to delete any case comments that may reference the expunged person by name.

### **Person Record**

It is not necessary to delete a person record from Online RMS. Once an Incident report is deleted, the association to that report is deleted from the Master Indices Person record.

If preferred, an agency can choose to edit the Master Person record specified in the expungement order to change the person's name rather than delete the individual events.

As an example, some agencies change the person's name to the reference number of the expungement order to preserve the event records and remove any ability to find records when searching for the person's name. If this flow is preferred, keep in mind the individual records will need to be reviewed to remove the person from associated narratives or comment fields.

### Orders to expunge records need to be handled on a case-by-case basis.

After reviewing your agency's current policy at the time of the order, and the decision is made on what records need to be deleted or edited, you can proceed to delete or edit those records within Online RMS. If you need further assistance, please submit a ticket to our Support Team.

# **External Repositories**

Caliber Online RMS contributes information from approved reports to external repositories such as NDEX. It may be necessary for agencies to expunge information contributed to these repositories by contracting them directly and following their expungement process.

### **Interfaces**

Your agency may contribute information to Caliber Online RMS through an interface with an external program. After the necessary information is expunged from Online RMS, you may need to contact the external vendor directly and follow their process to expunge the records in their program.

Examples of external interfaces are electronic ticket writers, crash reporting systems, and DWI/DUI reporting software.

## **Un-Expunge**

With proper permissions you can **Un-Expunge** an offender or arrestee on an Incident Report, or an entire Field Arrest. For more information, refer to "Un-Expunge" on page 769.

**Note:** Expunged records are not visible throughout Online RMS unless the user is granted permissions to view expunged details.

# Accessing the View Person Page

As with many areas of Online RMS, you can access the *View Person* page different ways:

From the Master Person Record.

Search for the Master Person record by clicking on the **Master Indices** menu on the *Top Navigation Bar*, then click **Person** from the drop-down list to open the *Master Index Search* page.

Enter the person's last name, first name, or other information to yield the desired results, then click the **Search** button to open the *Person Search Results* page.

Click on the appropriate person's **last name** to open the *View Person* page, then click on the *Person Summary* tab.

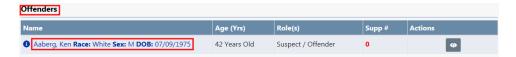


**Note:** For more information on Master Indices refer to "Master Indices" on page 81.

- From the Incident Report.
  - Search for and view the Incident Report. For more information on searching and viewing Incident Reports, refer to "View Incident Reports" on page 261.
  - While on the Incident Report click on the Names tab or the Offenders link.



- Locate the Offenders grid then click on the person's **Name** to open the *View Person* page.



**Note:** For more information on viewing Incident Reports refer to "View Incident Reports" on page 261.

# **Expunge Offender or Arrestee**

You can expunge an offender or arrestee from a Incident Report, providing the Incident Report is *approved* and you have *Expunge Records* permissions. Refer to your agency administrator for more information on *Expunge Records* permissions.

Incident **Expungements** apply to the offender only as there may be more than one offender.

The Person Summary tab on the *View Person* page displays an **Expunge** column in the Involved Incidents grid. A red Expunge icon appears in the **Expunge** column on records that qualify for expungement.

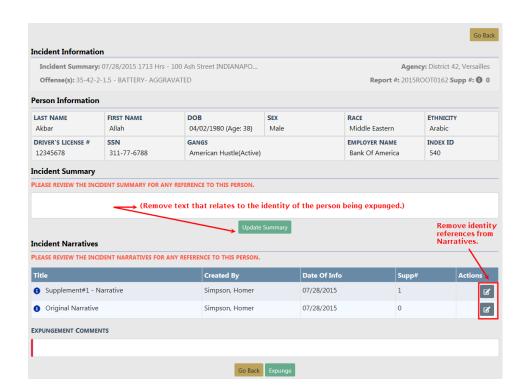
**Note:** For details on how to access the *View Person* page refer to "Accessing the View Person Page" on the previous page.

Locate the Incident Report on the Summary tab of the *View Person* page from which you want to **Expunge** the offender, then click on the red Expunge icon in the **Expunge** column to open the *Expunge Person* page.

Involved Incidents			
人	Expunge	Report#	
		2018D4210186	
		2017-0120	
		2017-0091	
		2016-BCSO- 000177	
		2016D4210025	
		2015ROOT0220	
	<b>□</b> ←	2015ROOT0162	
		2015ROOT0156	
		2015ROOT0154	
	â	0011315	

On the *Expunge Offender* page, review the Summary and remove all text that relates to the identity of the person being expunged, then click the **Update Summary** button. Also review **Narratives** tied to this Incident Report and remove all references to that person.

Note: Online RMS saves the original and the edited versions of the Narrative.



Click the **Back** button if you choose to cancel the expungement.

**Note:** If you cancel the expungement after updating the **Incident Summary** text, you need to update **Incident Summary** back to its original version manually.

To continue with the expungement, enter **Expungement Comments** at the bottom of the page then click the **Expunge** button.



The *View Person* page refreshes automatically, returning you to the *Person Details* tab. Click on the *Person Summary* tab to see **[Expunged]** in the **Expunge** column of the Incident.

Hover your mouse over the blue information bubble 10 to display expungement comments.

Involved Incidents			
<u> </u>	Expunge	Report#	
		2018D4210186	
		2017-0120	
		2017-0091	
		2016-BCSO- 000177	
		2016D4210025	
		2015ROOT0220	
	[EXPUNGED]	2015ROOT0162	
Hove	er for expun	2015ROOT0156 ged comments	

Users without the Expungement - View Expunged Records permission do not see the Incident Involvement, and the Involvement counts do not include the Incident from which the person was expunged. For more information refer to "Expungement Results" below.

Expunged records are not visible in Online RMS without the *Expungement - View Expunged Records* permission. Refer to your system administrator for more information on permissions.

## **Expungement Results**

Online RMS protects the identity and related data of expunged offenders or arrestees by applying restrictions based on a combination of user permissions and an Expunged flag placed on the data.

### Offender or Arrestee Name Restrictions

The offender or arrestee's name is replaced with the word **EXPUNGED** for users without the Expungement - View Expunged Records permission.

The offender or arrestee's name displays with an **[EXPUNGED]** tag for users with the Expungement - View Expunged permission.

- Incident Summary Tab Offenders Grid.
- Incident Names Tab Offenders Grid (no view icon).
- Incident Names Tab View Victim page Victim/Offender relationship.
- Incident Property/Vehicle Tab View Property page Property Owner.
- Incident Property/Vehicle Tab View Vehicle page Vehicle Owner.
- Visualization Incident Quick View Offender Grid.
- Incident Mapping Incident Quick View Offender Grid.
- Case Management Involved Names Grid.
- Evidence/Property Labels Property Owner.
- Evidence/Property Lab Report Suspect/Offender box.



## Other Expunged Data Restrictions

The following changes are applicable throughout Online RMS for users without the Expungement - View Expunged permission.

- Master Indices Person Common Event Associations (offender is not displayed at all).
- Visualization Offender or Arrestee to Incident link.
- Visualization Person Quick View Person Summary tab (Incident not displayed for offender).
- Photo Lineup Person Quick View Person Summary (Incident not displayed for offender).
- Person Collapse Person Quick View Person Summary tab (Incident not displayed for offender).
- Incident Narratives If updated during the expunge process, only the edited expunged version can be viewed.
- Incident Search Name / Combo additional search criteria (Incident not returned when searching by offender).
- Incident Smart Search by name (Incident not returned at all).
- Incident Smart Search by any other part of incident (offender not displayed / image not displayed).
- Case Search Name additional search criteria (Incident not returned when searching by offender).

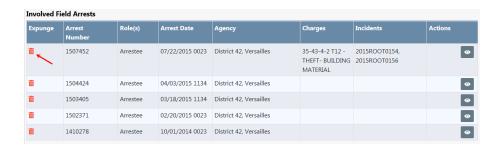
Online RMS displays the above data with an **[EXPUNGED]** tag on the record for users with the Expungement - View Expunged permission. Users with this permission can also view both the original Incident Narratives and the edited expunged versions.

**Note:** Regardless of the user's permissions, the Print Incident page does not display the expunged offender or arrestee's name, and Quick Print will not print the expunged offender or arrestee.

# **Expunge Field Arrest**

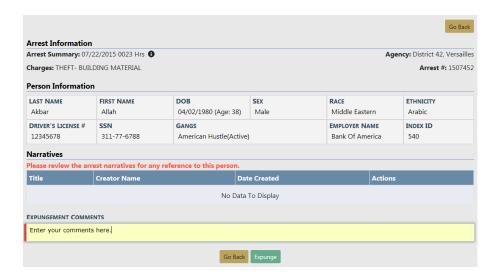
If you have the *Expunge Records* permission, locate the Involved Field Arrest on the Person Summary tab of the *View Person* page that you want to **Expunge**, then click on the red Expunge icon in the **Expunge** column to open the *Expunge Arrest* page.

**Note:** For details on how to access the *View Person* page refer to "Accessing the View Person Page" on page 760.



Review any **Narratives** tied to this Field Arrest and remove all references to that person.

**Note:** Online RMS saves the original and the edited versions of the Narrative.

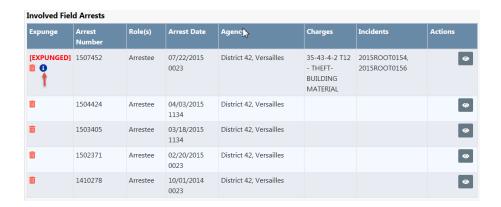


Click the **Back** button if you choose to cancel the expungement.

To continue with the expungement, enter **Expungement Comments** then click the **Expunge** button.

The *View Person* page refreshes automatically, returning you to the *Person Details* tab. Click on the *Person Summary* tab to see the **[Expunged]** tag in the **Expunge** column of the Involved Field Arrest.

Hover your mouse over the blue information bubble 10 to display expungement comments.



Users without the Expungement - View Expunged Records permission do not see the Arrest Involvement or the Involvement counts for the expunged Field Arrest. Refer to your agency administrator for more information on permissions.

Users with the Expungement - View Expunged Records permission the Involvement counts remain unchanged, the Field Arrest displays with an [Expunged] tag, common events to people, organizations, addresses, vehicles and property display, and an Un-Expunged icon appears to reverse the expungement.

**Note:** For more information on reversing an expungement refer to "Un-Expunge" on the facing page.

# **Expungement Results**

Online RMS protects the identity and related data of expunged records by applying restrictions based on a combination of user permissions and an Expunged flag placed on the data.

For users without the Expungement - View Expunged Records permission, the Field Arrest will not display as follows:

- Field Arrest Search Results (search by number, Arrestee, Names).
- Incident Summary Tab Arrest Grid (if associated).
- Warrants Arrest Grid (if associated).
- Incident Names Tab View Victim Page– Victim/Offender relationship.
- Master Indices Common Event Associations/Involvement Counts.
- Incident Mapping Incident Quick View.

Visualization – Incident Quick View.

Online RMS displays the above data with an **[EXPUNGED]** tag on the record for users with the Expungement - View Expunged permission. Users with this permission can also view both the original Incident Narratives and the edited expunged versions.

# **Un-Expunge**

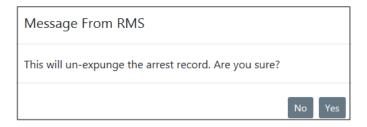
Only users with the *Expungement - View Expunged Records* permissions can **Un-Expunge** an offender or arrestee on an Incident, or **Un-Expunge** a Field Arrest.

Click the red Expunge icon in the Expunge column for the Incident or Field Arrest on the Person Summary tab of the View Person page.

**Note:** For details on how to access the *View Person* page refer to "Accessing the View Person Page" on page 760.



A confirmation message appears asking if you are sure. Click **Yes** to continue or click **No** to close the message without expunging.



If you chose to expunge, the Field Arrest becomes viewable to all users of the system, and the system discards both the edited expunge Narrative and Incident Summary.

# **Chapter 35. Training Videos**

# **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.

## **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 "Training Videos Library" on page 772.

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

## 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.

## Acknowledgment Required vs. Optional

The agency administrator has the option to **require your acknowledgment** after viewing videos. By acknowledging a video, you are stating that you have watched the video in its entirety. The video pops-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.

Unlike videos that require acknowledgment, **optional** videos do not pop-up automatically when you log into Online RMS.

All videos are stored in your **Training Videos Library**. You can watch videos whenever you wish by navigating to your **Training Videos Library**.

For more information on **watching** and **acknowledging** videos, refer to "Watch Training Videos" on page 777.

For more information on **Training Videos Library**, refer to "Training Videos Library" on page 772.

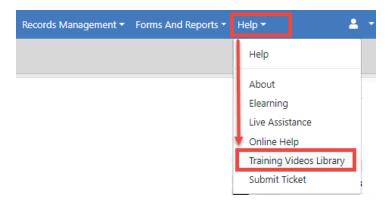
# **Training Videos Library**

Training videos reside in your personal Online RMS **Training Videos Library**, where you can keep track of the videos you have and haven't watched, and you can watch these videos as often and as many times as you wish.

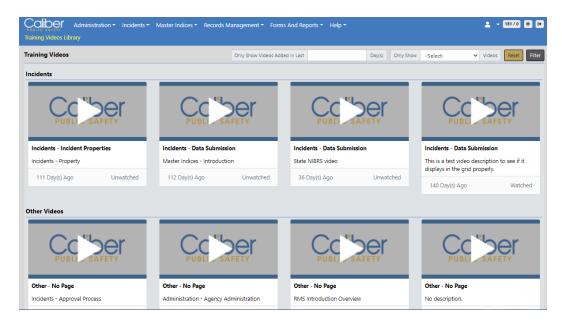
# **Access the Training Videos Library**

Follow these steps to access your **Training Videos Library** in Online RMS:

1. Click Help on the top navigation menu, then click Training Videos Library.



2. The Training Videos Library Opens.



# **Understanding the Training Videos Library**

## Videos can be divided into groups

Group examples:

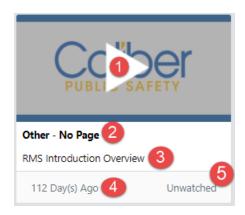
- Incidents
  - This group contains incident-based reporting videos.
- Other Videos
  - This group contains videos that do not fall into the other groups.

Grouping happens when the pop-up option is turned on and the agency administrator configures specific videos to pop-up on a specific page.

For example, if the agency administrator turns the feature on and they configure the Incident Category video to pop-up on the Incidents page, the Incident Category page displays under the Incidents category.

This the pop-up feature is not turned on, all videos appear under the Other Videos category.

### Video Elements



- 1. Click to Play.
- 2. The **Group** to which the video belongs (i.e., Incidents or Other Videos).
- 3. **Description** of the video.
- **4.** The **number of days** the video has been in your Training Video Library.
- 5. Status of the video (i.e., Watched or Unwatched).

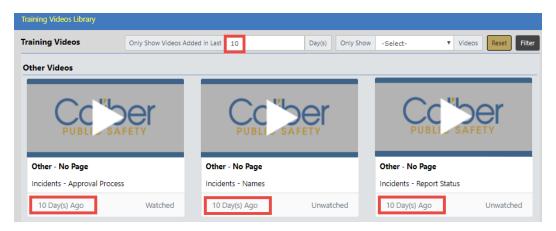
### Filter Video List

Across the top of the **Training Video Library**, you have the option to filter the video list by only showing videos that have been added within a *specified number of days*, and only show *watched* or *unwatched* videos.

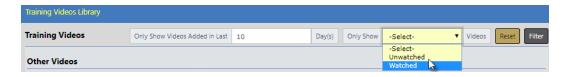
### Show Videos Added in Last Number of Day(s)



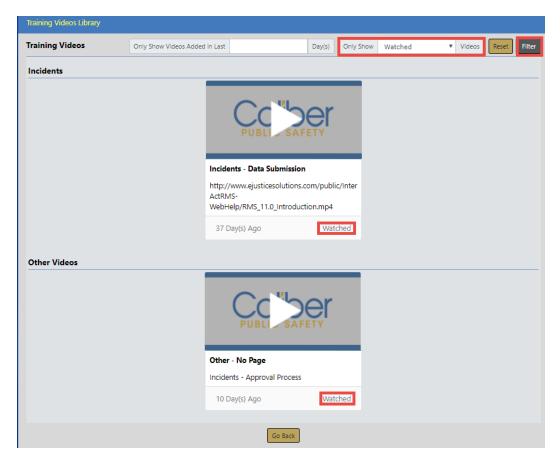
- 1. Enter the **number of days** in the field provided.
- 2. Click **Filter** to display only the videos that were posted to your **Training Video Library** within the days specified.



### **Show Watched or Unwatched Videos**

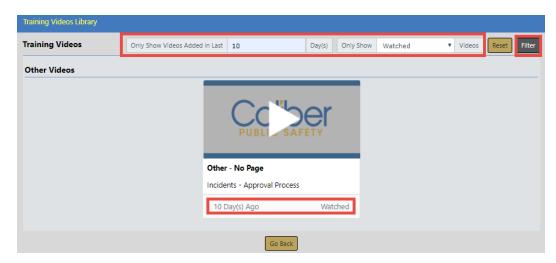


- Click into the Only Show field and select Watched or Unwatched from the list. Watched is used in the example.
- 2. Click **Filter** to display only the videos that match your criteria.



### **Show Videos with Combined Criteria**

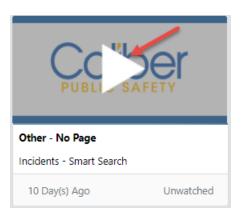
- 1. Enter the number of days in the field provided.
- 2. Click into the **Only Show** field and select **Watched** or **Unwatched** from the list. **Watched** is used in the example.
- 3. Click Filter to display only the videos that match your combined criteria.



# **Watch Training Videos**

Follow these steps to watch training videos in Online RMS:

- 1. Identify the training video you wish to watch. There are two ways to do this:
  - a. When a video *requires your acknowledgment*, the video pops 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.
  - b. Or, you can go to your **Training Videos Library** for a list of videos available to you. For details on accessing videos in your **Training Videos Library**, refer to "Training Videos Library" on page 772.
- 2. Click the Play button to launch the video with additional options.





- 1. The **Group** to which the video resides in your Training Video Library.
- 2. Hover mouse over, or click on the **information bubble** to view the description of the video.
- 3. Click on **Open in New Window** to open the video in a new window, separate from Online RMS.
- 4. Click to Play the video.
- 5. The length of time left and total video time, respectively.
- 6. Click to manage the audio.
- 7. Click to watch the video in Full Screen mode.
- 8. Click to **Download** the video or view it **Picture in Picture**.



9. Click acknowledge after watching the video in its entirety.

**Note**: This option only appears when an acknowledgment is required. For more information, refer to your agency administrator.

**Note:** The video pops up automatically every time you log into Online RMS, until you acknowledge having watched it.

10. Click to Close the window.

**Note**: This option grays out if an acknowledgment is required, and the acknowledgment checkbox has not been checked.

11. Click Watch Later if you wish to close and return to the video later.

**Note**: This option appears only if an acknowledgment is required, and it grays out when the acknowledgment box is checked.

**Note:** If you do not acknowledge having watched the video, the video pops up automatically each time you log into Online RMS and access a page to which the video is associated.

3. After the video plays and the window is closed, the video status changes from **Unwatched** to **Watched**.



# **Chapter 36. Training Module**

## Overview

The Online RMS **Training** module provides users with proper permissions the ability to create **Training Courses** and **Certifications** with date ranges and required prerequisites, then easily track employee involvement to ensure they each obtain and maintain the necessary training and certification based on their job duties.

This module is available with full subscription access to Online RMS. It is disabled by default but can be enabled, and additional user training is available for purchase. Contact Caliber Public Safety Support for more information.

The **Training** module can be configured specific to your agency's needs, such as an eligible list of course types (i.e. gun safety, mobile training, etc.) and classification levels. Refer to the Online RMS Administrator Guide for details on configuring these items.

There are two components to the **Training** module:

### Courses

Training classes with specific focus to refine skills (i.e., Online RMS training).

Attendees can be assigned to Courses two different ways:

- a. From the Course Instance record.
- b. From the Employee record.

#### Certifications

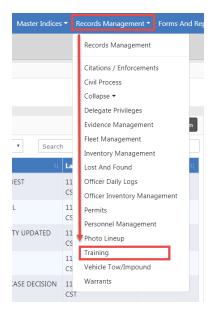
Proof of achieving specific skills or knowledge level that are mandatory for specific job duties (i.e., gun safety certification).

Attendees can be assigned to Certifications one way:

a. From the Employee record.

## **Training Module Dashboard**

Click the **Records Management** menu on the *Top Navigation Bar*, then click on the **Training** option to access a consolidated pathway for viewing and managing training data from a single screen.





**Note:** The **Training Dashboard** contents are based on permissions and can vary by user. For more information on permissions, refer to your system administrator.

## The **Training Dashboard** consists of several features:

1. There are five tabs that contain various course and certification information. Each tab contains links that allow you to view or edit information, depending on your per-

missions set by the agency administrator. Available links vary by tab as outlined below.

### **Upcoming Courses**

- A current list of active courses.
- View or edit upcoming courses.

### **Expired / Missing Courses**

- A list of employees not registered for a required course for their employee type, or a list of employees who are attendees of a course that has expired.
- View or edit employee records.

### **Near Expired Courses**

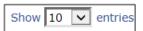
- A list of employees who are attendees of a course nearing expiration.
- View or edit employee records.

### **Expired Certifications**

- A list of expired certifications by employee.
- View or edit employee records.

### **Near Expired Certifications**

- A list of certifications about to expire by employee.
- View or edit employee records.
- 2. Three buttons on the top right of the window:
  - Click the Manage Courses button to add or update courses. For more information refer to "Manage Courses" on page 787.
  - Click the Manage Certifications button to add or update certifications.
  - Click the Go Back button to exit the dashboard.
- 3. You can change the number of entries that appear in the grid. Click on the **Show** Entries ✓ and select 10, 25, 50 or 100. The default is 10.



**4.** The bottom of the window displays the number of entries and it allows you to navigate between pages.



This example shows 10 entries per page. The highlighted number on the right is the page currently being viewed. Click **Next** to advance to the next page, or click the page number you want to view. Click on **Previous** to view the previous page.

5. Each tab allows you to **Search** or filter data that appears in the grid.



- a. Click on the tab you want to view, if different than the default Upcoming Courses.
- b. Enter text into the **Search** text box, then click the **Search** button or press **Enter** to display only records matching the entered text. The displayed list dynamically changes based on the entered text.

For example, on the **Upcoming Courses** tab enter *k*9 in the text box, then click **Search** or press **Enter** to show only records containing *k*9.



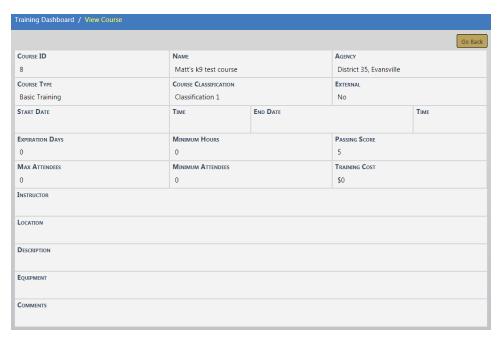
**Note:** Click the **Reset** button to remove the entered search text and list all available records.

**6.** Example of accessing information within a tab. The same general process applies to all tabs.

### **View Details Two Ways**

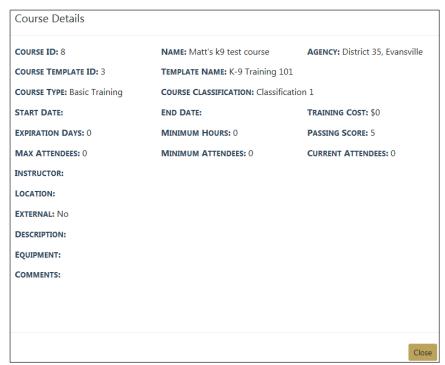
a. Click on a **Course** to view details about that particular course. This is view only, details cannot be changed here.





b. Click on the information bubble to view the details without having to open the record itself.





Click on the **Close** button to close the window and return to the **Training** dash-board.

#### **Edit the Details**

- a. Or click on the **Select** icon under the *Actions* column to edit the details of a particular course.
- b. Click on the **Back** button to return to the **Dashboard**. For your convenience, this button is located on the upper right of the window and on the lower center of the window; either will return you to the **Dashboard**.

## **Exit Training Module**

a. Click the Go Back button to return to the Records Management main menu.

## Courses

There are two components to **Courses**:

- Template
- Course Instance

## **Template**

A **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 that will pull into the newly created **Course Instance** automatically.

**Note:** For more information on permissions and managing **Training Templates** refer to the *Online RMS Admin Guide*..

### Course Instance

A **Course Instance** is 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. When creating a **Course Instance**, with proper permissions, you can either choose an existing **Template** from a list or create a new **Template** and **Course Instance** at the same time without moving between menus to do both.

**Note:** The phrase **Course Instance** is often referred to as **Course** throughout this guide.

## Manage Courses

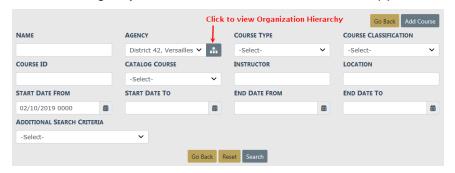
The **Manage Courses** button on the **Training** dashboard allows you to, with proper permissions, *Search*, *Add*, and *Edit* **Course Instance** data.

To update course data you must first search for the course. The search results will provide the option to update or view the course data.

**Note:** Once a Course Instance is created, you cannot delete it. Enter the appropriate **End Date** if created in error or if you need to end a particular Course Instance for whatever reason.

#### Search Courses

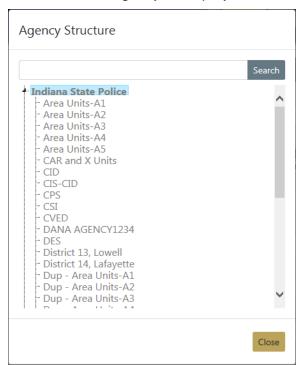
- 1. Click on the **Manage Courses** button on the **Training Dashboard**. For details on accessing the dashboard refer to "Training Module Dashboard" on page 782.
- 2. The Course Search screen appears.
- 3. With proper permissions you can select an **Agency** within the organization by using two methods.
  - a. Click in the Agency field then select from the list that appears.



b. Click on the hierarchy icon next to the **Agency** field to display the organization hierarchy.

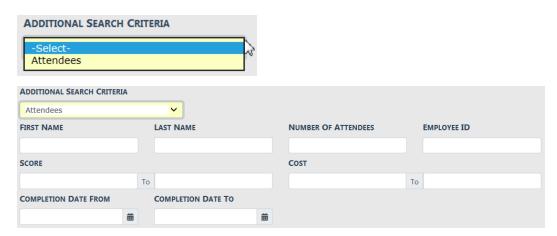


Hover over the agency to display a list of the agency's units.



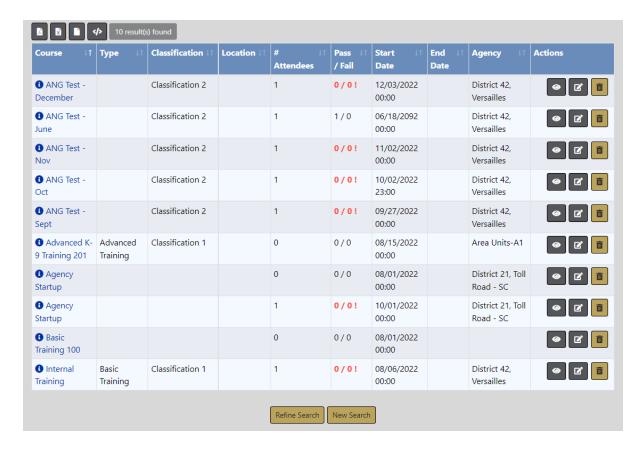
Click on the agency you want to include in the search and the agency name appears in the **Agency** field.

- 4. The fields with **-Select-** supply a specific list from which to choose. For example, to search for a specific **Course Type** click in the field and a list will appear, then click on an item from the list.
- 5. Optionally reduce your search results to include only **Additional Search Criteria** by using the drop-down list at the bottom left of the screen., then enter the appropriate information in the additional fields that appear on the screen.



6. Either click Reset to clear all fields to start over, click Go Back to return to the Training dashboard, click Search to display a list of existing courses that match the entered data, or Add Course to add a course to the database without first searching. For details on how to add a course refer to "Add Course " on the next page.

If you selected **Search** the results display in a grid.



- The Pass/Fail column represents the total number of attendees that passed and the total that failed, respectively.
- If the total number of attendees equals Total Pass + Total Fail, the numbers display in black, otherwise the numbers display in red with an exclamation point.

Click **Refine Search** to modify your current search criteria, or **New Search** to start the search over. Click on the course name to view course details, or click the Edit

icon in the *Actions* column to edit the course. For details on editing the course refer to "Edit Course" on page 792.

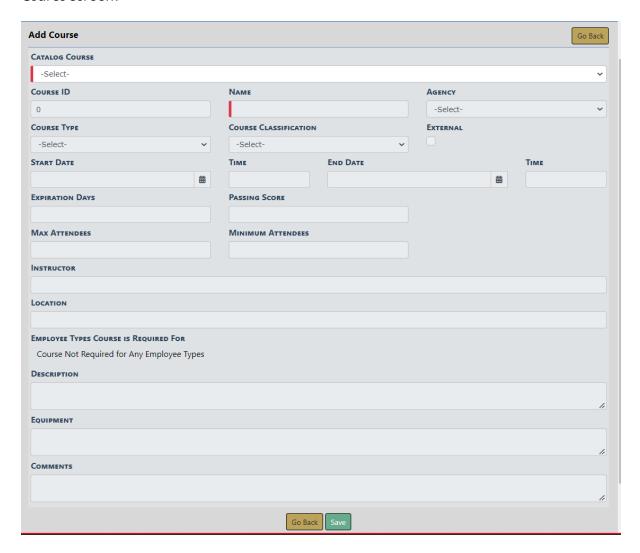
7. To export search results to a file refer to "Export Search Results" on page 35.

#### Add Course

Add courses by way of the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 782.

1. Click on the Manage Courses button on the Training dashboard.

- 2. The **Course Search** screen appears. Before adding the course, it is recommended you first search for the course to verify whether or not it already exists, though not required. For instructions on how to search for courses refer to "Search Courses" on page 787.
- 3. Click on the **Add Course** button on the **Course Search** window to open the *Add Course* screen.



Select a course template from the Catalog Course list.

If you do not see an option on the list that fits the course you are adding, you can select the **-New Course-** option, located at the top of the list, and the system creates a Course Template automatically based on the data you enter on the *Add Course* form. Once you save the record, it will then appear in the **Catalog Course** list and is available to other users who also have the permissions to manage courses.

- **4.** Once you choose a **Catalog Course**, other fields on the form become available to accept data. Enter the appropriate data in the fields provided.
- 5. Click **Save** to create the Course record, or click **Go Back** to return to the **Course Search** screen without creating the record.

When you select Save, the Edit Course screen displays.

Additional information can be added such as, **Attendees** and **Groups**. For detailed instructions refer to "Edit Course" below.

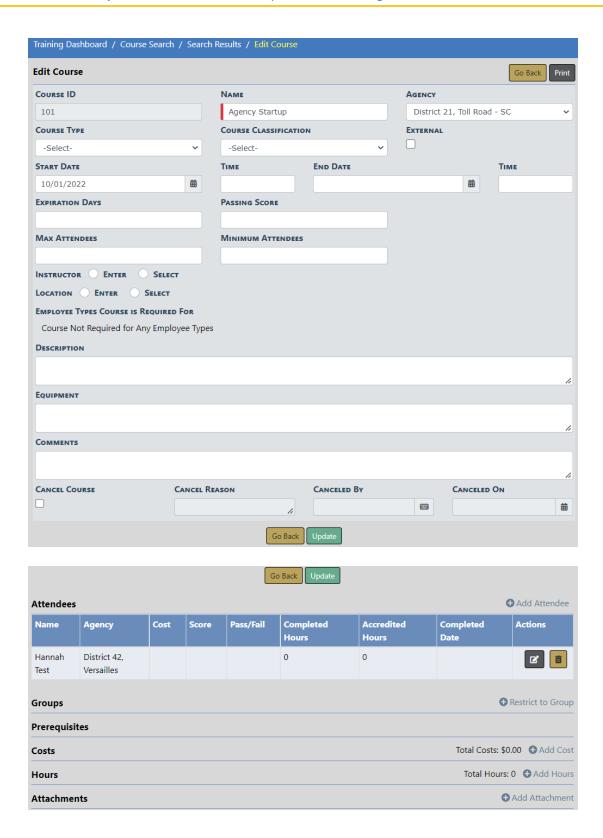
All **Attachments** and **Prerequisites** reside on the Class Template or Catalog Course that you chose for the class record; if they do not exist on the course template, then they do not appear on your course record. Adding attachments and prerequisites to class templates is an admin function (with the exception of additional attachments specific to this instance).

**Note:** If you need to add attachments or prerequisites to a course, refer to the Online RMS Admin Guide for instructions or see your administrator.

### Edit Course

To edit a course you must first **Search** for the course. The **Search Results** provides the option to edit the course data.

- 1. Click on the **Manage Courses** button on the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 782
- 2. The **Course Search** screen appears. Search for the course you want to update. For instructions on how to search for courses refer to "Search Courses" on page 787.
- 3. In the Course Search Results, click on the **Edit** icon that appears in the *Actions* column of the course record you want to update. The **Edit Course** form opens.



4. Make the necessary updates to the existing data, then click the **Update** button to apply the changes, or click the **Go Back** button to return to the **Course Search Results** window, if you wish.

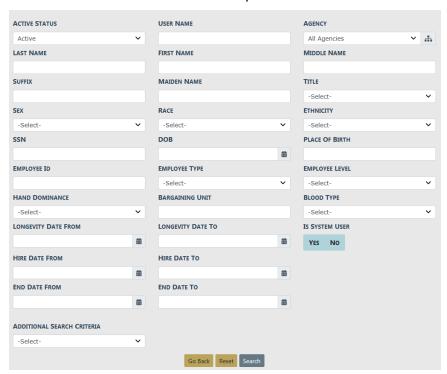
**Note:** You cannot delete a Course Instance. Enter the appropriate **End Date** if created in error or if you need to end a particular Course Instance for whatever reason.

- 5. You can **Enter** the instructor for the course, or select the instructor from the drop-down box that becomes available when you choose **Select**.
- **6.** You can **Enter** the location for the course, or select the location from the drop-down box that becomes available when you choose **Select**.
- 7. You can Add, Edit, or Delete an Attendee.

#### Add an Attendee

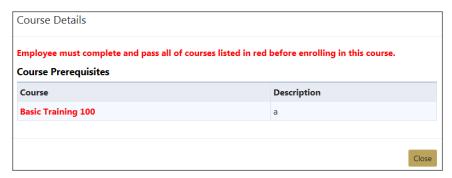
a. Click on the **Add Attendee** link while on the **Edit Course** form to add attendees to the class. The **Employee Search** screen appears.

**Note:** A link will appear on the attendee grid if A) the course template is configured as a requirement for an employee type; and B) employees of that type have not taken the course or are expired.



b. Enter the search criteria into the fields provided, then click **Search** to display the **Employee Search Results**.

- c. Optionally click on the person's **Last Name** to view the employee record, or click the **Select** icon under the *Actions* column to select and add the person to the course record.
- d. If the employee has not yet filled a *Prerequisite* that is associated with the course, a message appears indicating the selected employee cannot yet enroll in this course.



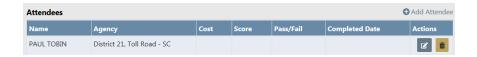
e. If there are no *Prerequisites* to fulfill, the **Add Attendee** form appears.



- f. Enter the appropriate information then click **Save**, or click **Go Back** to return to the **Employee Search Results** screen without adding the attendee. Leave fields blank that do not currently apply.
- g. After clicking **Save**, An *Add Attachment* link appears. Click on the link to attach a photo or document to this attendee record. A prior certification, for example. For instructions on attaching documents refer to "Attachments" on page 67.



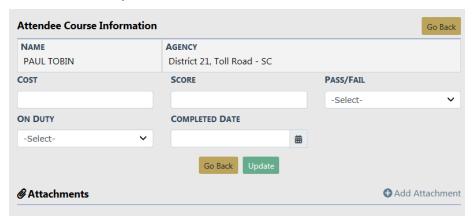
- h. If you made changes or added attachment, click **Update**, then **Go Back** to return to the **Edit Course** form, otherwise click **Go Back**.
- Attendees that are successfully enrolled in the course appear in the Attendees grid.



**Note:** When enrolling an attendee, the system also add the course to the attendee's Online RMS Employee record automatically. For more information refer to the *Online RMS Administrator Guide* or your system administrator.

#### Edit an Attendee

a. Click the **Edit** icon on the attendee record you want to update and the **Edit**Attendee form opens.



- b. Enter the relevant information then click **Update** to save your changes.
- c. Click Go Back to return to the Edit Course page.
- d. Make other needed updates if needed, then click **Update**. Click **Go Back** to return to the **Course Search Results** page.

#### **Delete an Attendee**

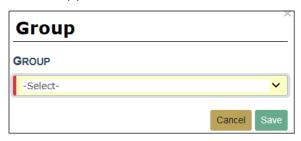
- a. Click the **Delete** icon on the attendee record you want to delete.
- b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Course** window without deleting.



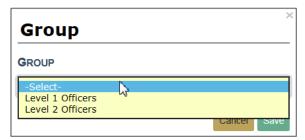
8. You can restrict the class to specific groups.

## Add a Group

a. Click on the **Restrict to Group** link while on the **Edit Course** form. The **Group** window appears.



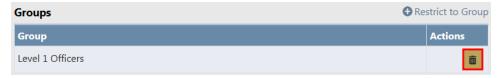
b. Click on the **Group** field and select a group from the list. This list is configurable and is maintained by your administrator.



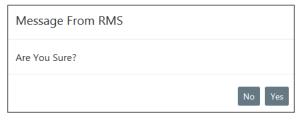
c. Click Save to add the group or Cancel to return to the Edit Course window without adding the group.

## Delete a Group from the Course

a. Click the **Delete** icon on the group record you want to delete from the course.



 b. A confirmation window appears. Click Yes to delete or No to return to the Edit Course window without deleting.

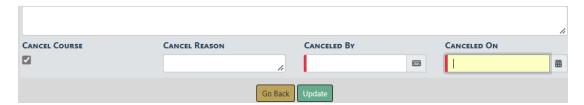


**Note:** When deleting an enrolled attendee, the system also removes the course from the attendee's Online RMS Employee record automatically. For more information refer to the *Online RMS Administrator Guide* or your agency administrator.

- 9. Hour categories can be added to the course instance in the same manner as described herein, although the specifics differ. (Categories are defined by an administrator and each category may only be added once to the course instance.) Hours stem from the course template, but can be edited or removed and additional hours added.
- **10.** Cost categories can also be added to the course instance in the same manner as described herein. (Cost categories are defined by an administrator.) Costs stem from the course template, but can be edited or removed and additional costs added.
- 11. Additional attachments can also be added to the course instance.
- 12. Click the Go Back button to return to the Course Search Results screen.

#### Cancel Course

To cancel a course, select the **Cancel Course** check box and fill in the fields that become available when the box is checked. Then click **Update**.



## Manage Certifications

The **Manage Certifications** button on the **Training** dashboard allows you to, with proper permissions, *Search, Add*, and *Edit* **Certification** data.

To update certification data you must first search for the certification. The search results will provide the option to update or view the certification data.

**Note:** Once a Certification is created, you cannot delete it. Enter the appropriate **Expiration Days** if created in error or if you need to end a particular Certification for whatever reason.

Associating a certification to an employee is an administrator function. Refer to the Online RMS Administrative Guide for details or contact your agency administrator.

## Search Certifications

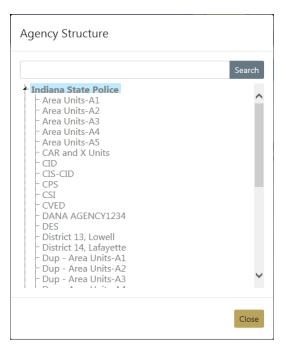
- 1. Click on the **Manage Certifications** button on the **Training Dashboard**. For details on accessing the dashboard refer to "Training Module Dashboard" on page 782.
- 2. The Certification Search screen appears.
- 3. With proper permissions you can select an **Agency** within the organization by using two methods.
  - a. Click on the Agency field then select from the list that appears.



b. Click on the hierarchy icon to display the organization hierarchy.



Hover the mouse over an agency to display a list of the agency's units.



Click on the agency you want to include in the search and the agency name appears in the Agency field.

4. Either click Reset to clear all fields to start over, click Go Back to return to the Training dashboard, click Search to display a list of existing certifications that match the entered data, or Add Certification to add a certification to the database without first searching. For details on how to add a certifications refer to "Add Certification" on the facing page.

If you selected **Search** the results display in a grid.



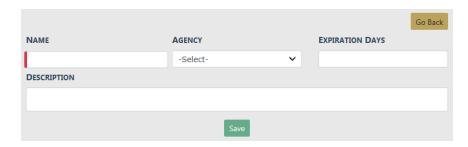
5. Click on the certification **Name** to view details, or click the **Edit** icon in the *Actions* column on the right to edit the certification. For details on editing refer to "Edit Certification" on page 802.

- **6.** Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over.
- 7. To export search results to a file refer to "Export Search Results" on page 35.

#### Add Certification

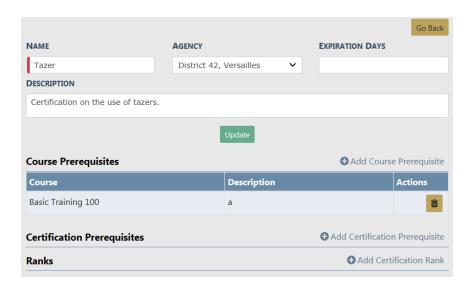
Add certifications by way of the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 782.

- 1. Click on the **Manage Certifications** button on the **Training** dashboard.
- 2. The Certification Search screen appears. Before adding the certification, it is recommended you first search for the certification to verify whether or not it already exists, though not required. For instructions on how to search for certifications refer to "Search Certifications" on page 799.
- 3. Click on the **Add Certification** button on the **Certification Search** window to open the *Add Certification* screen.



- Enter a **Name** for the certification and other application information.
- 4. Click Save to create the Certification record, or click Go Back to return to the Certification Search screen without creating the record.

When you select **Save**, the **Edit Certification** screen displays.



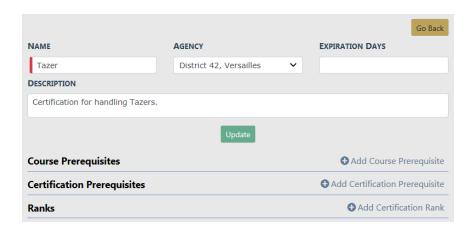
Additional information such as Course Prerequisites, Certification Prerequisites, and Ranks can be added to the certification. For detailed instructions refer to "Edit Certification" below.

**Note**: A course can only be deleted if it is open and has no attendees associated with it.

#### Edit Certification

To edit a certification you must first **Search** for the certification. The **Search Results** provides the option to edit the course data.

- 1. Click on the **Manage Certifications** button on the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 782
- 2. The **Certification Search** screen appears. Search for the certification you want to update. For instructions on how to search for certifications refer to "Search Certifications" on page 799.
- 3. Click on the **Edit** icon that appears in the *Actions* column of the certification record you want to update. The **Edit Certification** form opens.



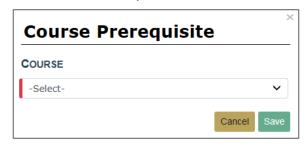
4. Make the necessary updates to the existing data, then click the **Update** button to apply the changes, or click the **Go Back** button to return to the **Certification Search Results** window, if you wish.

**Note:** Once you create a certification, you cannot delete it. Enter the appropriate **Expiration Days** if created in error or if you need to end a particular certification for whatever reason.

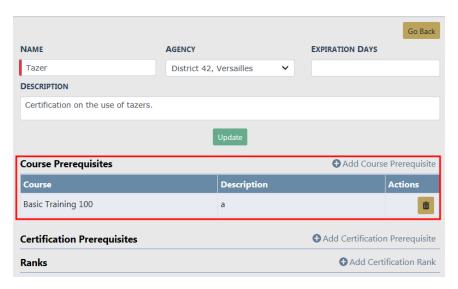
5. You can Add or Delete (remove) a Course Prerequisite.

#### Add a Course Prerequisite

- a. Click on the Add Course Prerequisite link while on the Edit Certification form.
   The Course Prerequisite screen appears.
- b. Click into the **Course** field and choose a **Course Prerequisite** from the list that appears. Prerequisites that appear on the list are managed by your administrator. For questions on list content see your administrator.



c. Click **Save** to add the prerequisite to the certification or **Cancel** to return to the **Edit Certification** screen without adding the prerequisite.



## **Delete Prerequisite from a Certification**

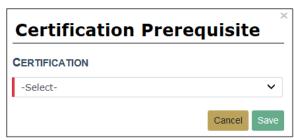
- a. Click the **Delete** icon on the course prerequisite record you want to delete.
- b. A confirmation window appears. Click **OK** to delete or **Cancel** to return to the **Edit Certification** window without deleting.



6. You can Add or Delete (remove) a Certification Prerequisite

## Add a Certification Prerequisite

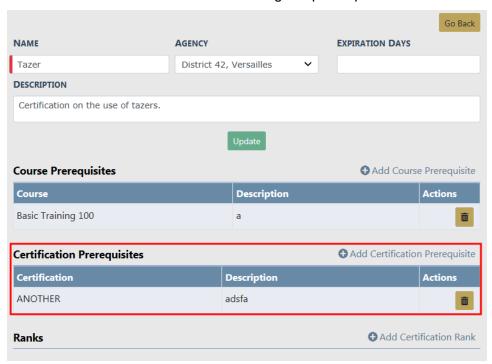
a. Click on the Add Certification Prerequisite link while on the Edit Certification form. The Certification Prerequisite screen appears.



b. Click into the **Certification** field and choose a **Certification** from the list that appears. Prerequisites that appear on the list are managed by your administrator. For questions on list content see your administrator.

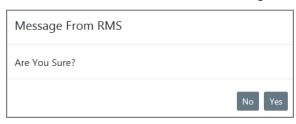


c. Click **Save** to add the prerequisite to the certification or **Cancel** to return to the **Edit Certification** screen without adding the prerequisite.



## **Delete Prerequisite from a Certification**

- a. Click the **Delete** icon on the course prerequisite record you want to delete.
- b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Certification** window without deleting.



7. You can Add or Delete (remove) a Certification Rank

#### Add a Certification Rank

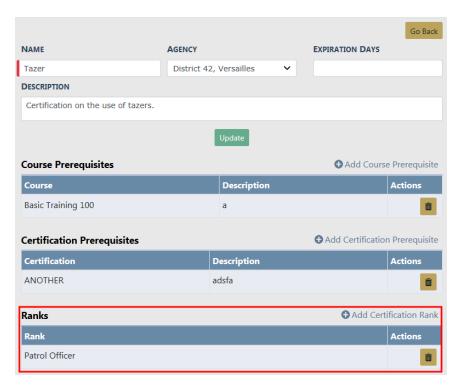
a. Click on the Add Certification Rank link while on the Edit Certification form.
 The Ranks screen appears.



b. Click into the **Rank** field and choose a **Rank** from the list that appears. Ranks that appear on the list are managed by your administrator. For questions on list content see your administrator.

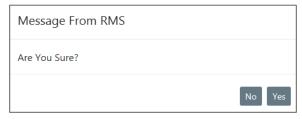


c. Click **Save** to add the rank to the certification or **Cancel** to return to the **Edit Certification** screen without adding the rank.



#### Delete Rank from a Certification

- a. Click the **Delete** icon on the rank record you want to delete.
- b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Certification** window without deleting.

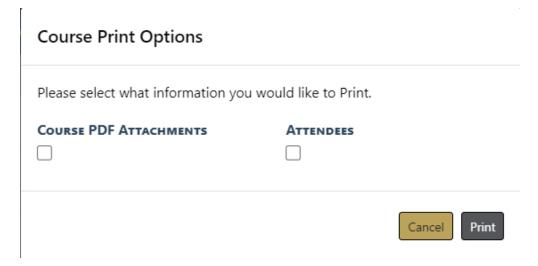


## **Printing Courses**

When viewing a course from the Training Dashboard, select **Print** to print course attachments and/or attendees.



Check the box to print Course PDF Attachments and Attendees, then select Print again.



The selected options will print to the corresponding selected printer.

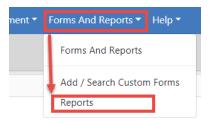
# **Chapter 37. Reports**

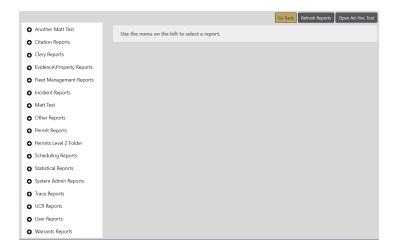
## **Reports Overview**

A **Report** returns a set of data in a structured format, so the information is easy to view, follow, and understand. Online RMS offers a variety reports that can be viewed and printed, such as Incident Reports, User Reports, and NIBRS Reports to name a few. Some reports may include charts or graphs that summarize data at a glance.

Available reports vary by agency and permissions. For more information on permissions refer to your administrator.

Reports are accessed from the top menu of Online RMS.



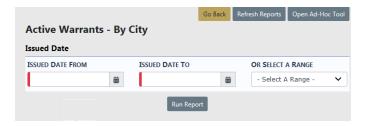


Reports are grouped by Module or custom-grouped by your agency administrator. Click the plus sign (+) next to a Module to expand the available reports, then click on a report you want to generate.

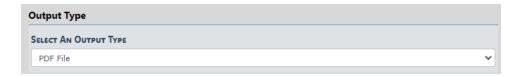
**Note:** Your agency administrator can custom-group Ad-Hoc reports into their own categories, or add to existing categories. Before Online RMS 11.7.0, all Ad-Hoc reports were listed under Other Reports. For more information, refer to your agency administrator or *Caliber Online RMS Administrator Guide*.



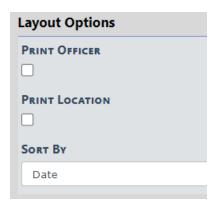
Enter available parameters to restrict the set of records that appear in the report. The *Active Warrants - By City* report below is used as an example. The parameters vary by report.



If applicable, page down to the bottom and select the **Output Type** from the drop-down list.



If applicable, you can choose different layout options for the report, as shown in the Incident Type Report below.



Click the Run Report button located at the bottom of the screen.

A PDF document opens in a new tab in your browser. Print directly to the printer or save the PDF document giving it a custom filename.

**Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 37 for special instructions.

# Chapter 38.Interfaces

## **Interfaces Overview**

An Interface is where two systems meet and interact. Caliber Public Safety leverages this technology to share information between our flagship products. For example, Online RMS accepts Call for Service information from Caliber CAD NG to create RMS Incident Reports and allow users to view CAD Calls for Service (CFS) information while logged into RMS. Another example is where the Court Case Management System (CMS) can retrieve and use Online RMS Citation data using a Web Interface. Standard interface fees may apply to enable an interface.

# Citation to Court Case Management System

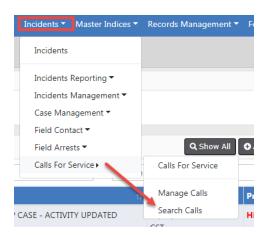
This Online RMS web service loads **RMS Citation**data into the **Court Case Management System (CMS)**as one-way only; data transmits from one system to another but does not return to the originating system.

Request a copy of the *Online RMS Web Services Guide* if you are interested in this interface. The standard interface fee applies to enable this interface.

## CAD to RMS Calls for Service

Online RMS accepts Caliber CAD NG Call for Service (CFS) information to create *RMS Incident Reports* and allow users to search and view CAD CFS information while logged into RMS. CFS data that is spilled from CAD cannot be modified in RMS.

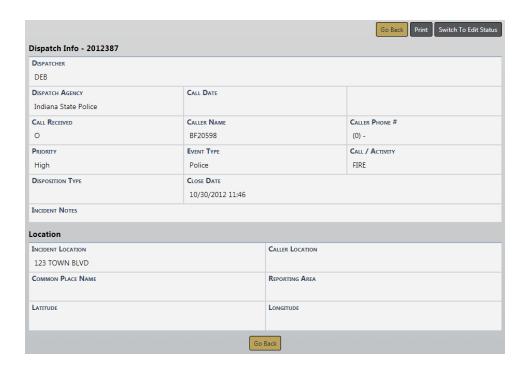
CAD CFS data spilled to Online RMS is searched and viewed from the **RMS Incidents** menu.





Enter the search criteria and click the **Search** button to display *Search Results*.

Click on the **View** icon that appears in the *Actions* column of the *Search Results* to view CFS details spilled from CAD.



**Note:** For more information on searching CFS records refer to "Search Calls for Service" on page 179.

## **Master Vehicles**

Prior to Online RMS 11.8.0, the CAD Interface only matched or created Master Vehicles in Online RMS when there was an Incident Report created in the transfer.

With Online RMS 11.8.0, the CAD interface provides a setting to perform one of the following:

- Match or create Master Vehicles from the CAD data transfer with Online RMS Master Vehicles even when there is not an Incident Report created.
- Match or create Master Vehicles from the CAD data transfer with Online RMS Master Vehicles only when an Incident Report is created in the transfer.

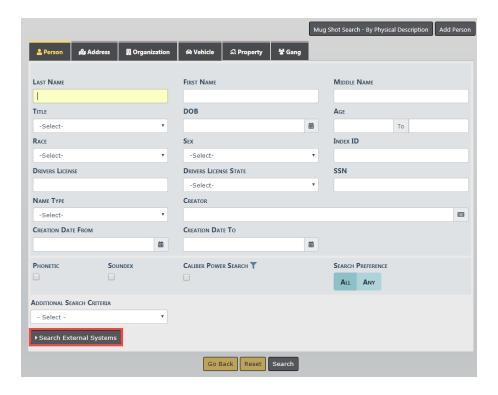
The default minimum matching criteria is as follows:

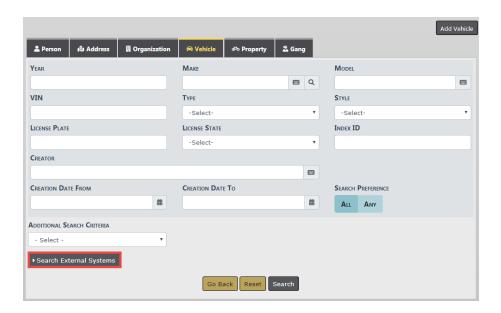
- VIN or Make
- License Plate and Year of the vehicle

**Note:** Contact Caliber to customize the minimum matching criteria for your agency.

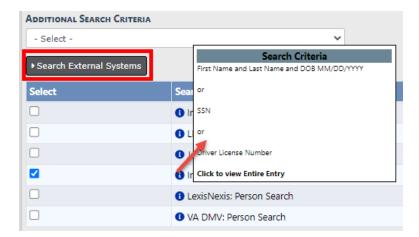
## InterDEx Queries

When searching directly from the Person, Vehicle or Property tab on the Master Indices screen, select the **Search External Systems** link to expand the list of available search interfaces for the master indices.





The Search interface displays under the **Search External Systems** button if you have the correct permissions. In this section, hovering over the information bubble by the interface name will determine the required attributes the user must enter for the search to execute.

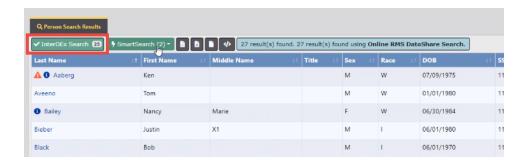


Click the box to the left of the InterDEx search option to select as shown above.

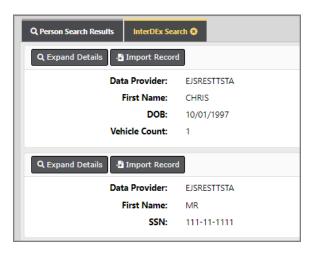
The Search Status column contains the **Status** of the Interface. The Status indicates if all required attributes have not been populated for the search.

Once all the required attributes have been met, the Status will change to **Ready**. The Person, Vehicle and Property Master Indices search tabs all work the same.

Once you have the information complete and select **Search**, the Search results displays with a separate button indicating the number of records found. *InterDEx* search runs outside of other external searches, such as SmartSearch for example.



Select the green **InterDEx Search** button as shown above to open the *InterDEx* search results.



Online RMS displays a candidates list of potential matching results returned from *Inter-DEx*. Select **Expand Details** to view additional information known for the person. Select **Import Record** to create a new master person record using the name information returned.

For details on importing a person record, refer to the *Import/Update Person Results* from External Systems section of "Adding Person" on page 97.

## **Hunter Camera**

If configured for your agency, you can take photos directly from the Online RMS Field Arrest or Master Person Index record using the **Hunter Camera** integration software installed on your local machine. The software associates the images with the *Master Person Index* record.

## **General Guidelines**

 One or multiple Hunter Cameras can be configured. If multiple, then you can choose which camera to use.

Online RMS11.11

 Online RMS requires that the person record have a recent physical description. If the physical description is not recent, Hunter Camera prompts you to enter a new description.

## **Take Photos**

Follow these steps to take photos from the Field Arrest or Master Person record using the **Hunter Camera** integration software:

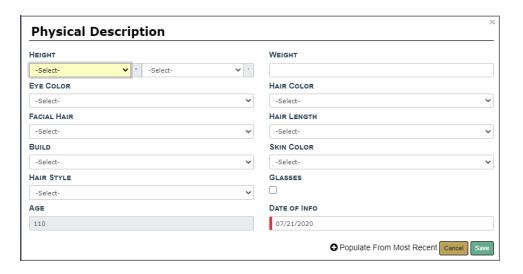
1. Edit the Field Arrest or Master Person Index record, then click on the **Hunter Camera** button on the top right of the screen.



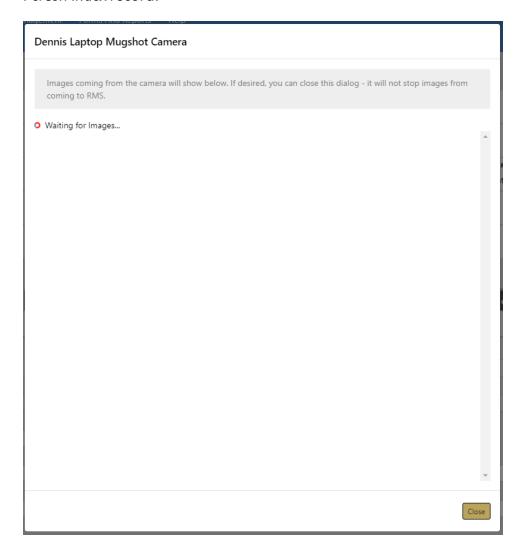
If your agency and local machine is configured to use multiple Hunter Cameras, first **select** a camera from the drop-down list, then click on the **Hunter Camera** button.



2. If the person's physical description does not exist or is not recent when you click on the camera button, a dialog box appears asking you to enter the physical description.



- a. Enter data in the fields provided or click **Populate From Most Recent** on the bottom of the dialog box to pull in existing data then make the necessary updates.
- b. Click Save.
- c. The physical description saves and associates to the *Master Person Index* record.
- 3. Take the picture then click **Send** in the Hunter Camera software.
- **4.** The Hunter Camera dialog box appears, waiting for the images to save to the *Master Person Index* record.



**Note:** You can close the dialog box or keep the dialog box open while another user transmits other images from the Hunter Camera software on their machine; as images transfer to the *Master Person Index* 

record, the images appear on the upper right of the Field Arrest record.

## LiveScan

If configured for your agency, you can transmit arrest and arrestee information, including images to **LiveScan** directly from the Field Arrest record.

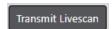
## **General Guidelines**

- Images and the arrestee's physical descriptions are associated with the *Master Person Index* record and not the Field Arrest.
- LiveScan interface requires the arrestte's birth country, birth date, OBTN, and other data. LiveScan prompts you to enter missing data.
- An OBTN is required for LiveScan. If a OBTN does not exist on the Field Arrest, Online RMS creates one automatically.
- Images are not required, but if they exist, the images associated with the most recent physical description are sent through the LiveScan interface.
- LiveScan accepts front, right, and left profile images along with SMT images.

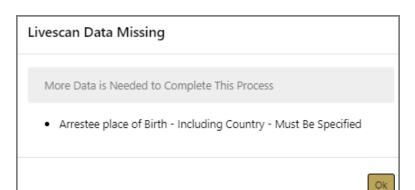
## Transmit LiveScan

Follow these steps to transmit Field Arrest data and any images to LiveScan:

- 1. Access the Edit Field Arrest of the appropriate Field Arrest record.
- 2. Click on the **Transmit Livescan** button on the top right of the *Edit Field Arrest* screen.



3. If LiveScan detects missing data, a dialog box appears with instructions.



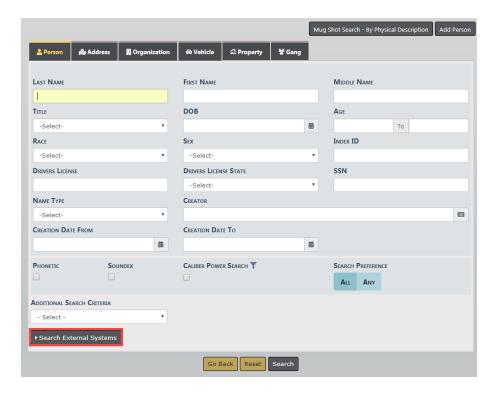
- a. Click OK.
- b. Enter the missing information, then click the Transmit Livescan button again.
- 4. Online RMS generates an OBTN number automatically if it doesn't exist.
- **5.** A green *successful transmission* message briefly appears across the top of the screen when the transmission completes successfully.

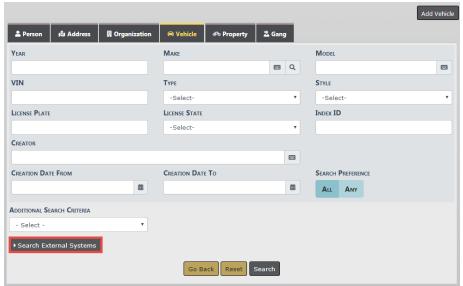


Note: If configured for your agency and the proper software is installed on your machine, you can take photos directly from the Field Arrest or Master Person Index record using the **Hunter Camera** integration software. For more information, refer to "Hunter Camera" on page 818.

## LexisNexis Queries

When searching directly from the Person, Vehicle or Property tab on the Master Indices screen, select the **Search External Systems** link to expand the list of available search interfaces for the master indices.





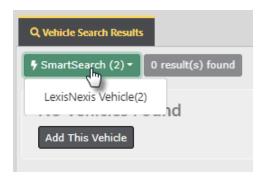
The Search interface displays under the **Search External Systems** button if you have the correct permissions. In this section, hovering over the information bubble by the interface name will determine the required attributes the user must enter for the search to execute.

Click the box to the left of the **LexisNexis** search option to select, then click **Search**. Vehicle search is used in this example.

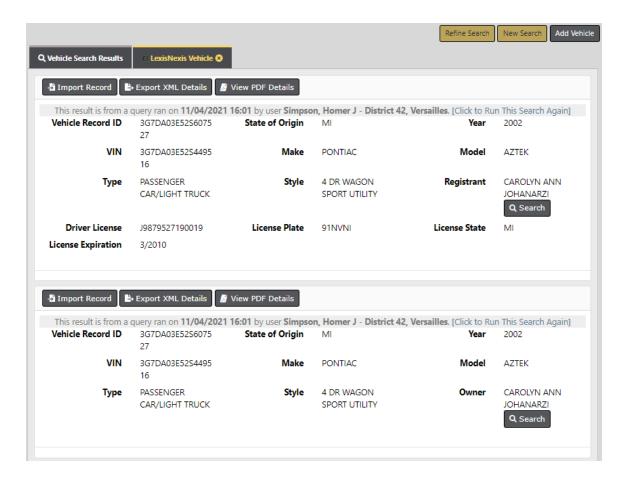


Charges apply per search, so you must select the LexisNexis option as the system does not select it automatically.

Select the **Smart Search** button, then select **LexisNexisVehicle** to display the search results. The number in parenthesis represents the number of records found.



A new tab opens listing the details of the search.



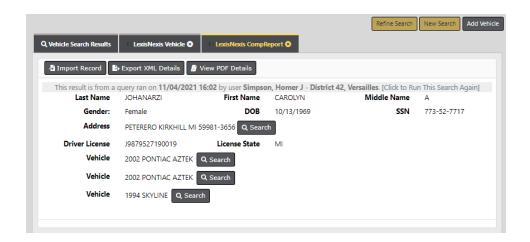
Select Import Record to create a new master record, select Export XML Details, or View PDF Details.

Importing a person or address record use a similar process. For an example of importing a record, refer to the *Import/Update Person Results from External Systems* section of "Adding Person" on page 97.

You can also drill down to perform additional searches where you see the **Search** button. The Registrant is used in this example.



Click the **Search** button to view details of the Registrant.



As long as you see a **Search** button, you can drill down even further for more information.

A new tab opens each time you click on a Search button.

You can move between tabs, or close each down by clicking on the X in the tab header.

# **Appendix A.Training Accounts**

## **Generic Training Accounts**

When you connect to the Online RMS Training Database, you may utilize any of the following generic accounts. Each role has a selection of accounts and can be used by multiple individuals. These accounts are available for any actions you wish to perform in the Online RMS system. The training system does not contain any real criminal data so please ensure you only enter test data. For example, we often use cartoon characters or invented names and identifiers. Real address locations can be utilized to view the mapping functionality.

Simply go to the following website to enter the Online RMS Training DB:

https://rmstrain.public-safety-cloud.com/train

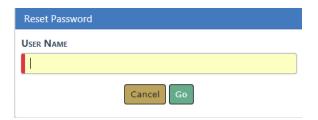
Training Accounts user IDs and passwords will be distributed by the administrator.

# Appendix B.Resetting Passwords

## Resetting OnlineRMS Password

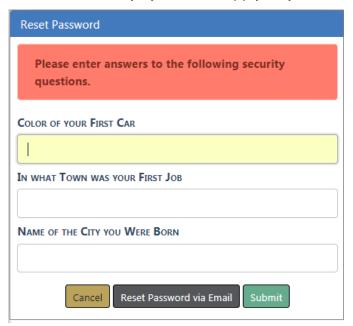
This guide explains how to reset the Online RMS password from the workstation web browser.

- Click the Reset Password link at the Online RMS login screen.
- Type the **User ID** and click the **Go** button.



For added security, the user will be prompted with three security questions.
 There are different questions available and they are configurable by the administrator or user with proper permissions. Answer the security questions and click the Submit button.

Questions can vary by user and apply only when configured.



**Note:** If you have forgotten your password click on the **Reset Password via Email** link to receive a confirmation email. For further assistance contact your agency administration or refer to "Forgotten Password Procedure" below

**Note**: If no user security questions are found in the system, a window appears where you must reset your password via email.

- Once the credentials are validated, the user is taken to the Change Password screen.
- The password rules are as follows:
  - The minimum password length shall be 8 characters.
  - Passwords shall be case sensitive.
  - Passwords shall be alphanumeric and allow for special characters.
  - Passwords shall contain at least one lower case, one capital letter, and one number
  - Passwords shall need to be reset every 90 days.
  - Passwords will be on a rotation of three (10) passwords.
  - The maximum amount of password attempts is five (5). Once the account is locked, the password will need to be changed.
- Type a new password in the Enter and Re-Enter fields and click Submit.
- A warning message will appear if the password rules are not followed.
- Once completed, the user will be transported to their *Home* screen.

**Note:** Click the **Cancel** button to abort the process at any time.

## Forgotten Password Procedure

With the release of Online RMS 10.9, we have instituted a security policy that every user have a unique email address associated to their account. This requirement grants users with improved, self-administered password resets.

**Note:** In addition, this complies with the CJS policy many of our users must follow. For information about this and the email address

requirement, review the additional document called Secure Email Account Requirement for Online RMS users.

To facilitate the self-administration for forgotten passwords and/or security questions, Caliber Public Safety has implemented a new **Reset Password** procedure at the Online RMS login screen.

The reset password procedure will work in the following fashion:

- 1. At the Online RMS login screen, click the **Reset Password** link.
- 2. Type the User ID and click the Go button.



3. Click on the Reset Password via Email link to receive a confirmation email



**4.** You are prompted to provide the unique email address on file for your user account. Enter the email address then click the **Go** button. A confirmation message displays on screen:

"A new password has been sent to your email address. Please follow the instructions on the email for further information."

If an incorrect email address is given, an error is presented and you cannot continue with the password reset.

- 5. An email is sent to you from Online RMS with the new temporary password.
- **6.** Login with your User ID and this temporary password. You must re-register your account by:
  - Providing three new and unique security questions (using the drop down fields).
  - Providing answers to these new security questions.
  - Resetting and confirm a new password (following the same secure password rules when they initially registered their accounts)

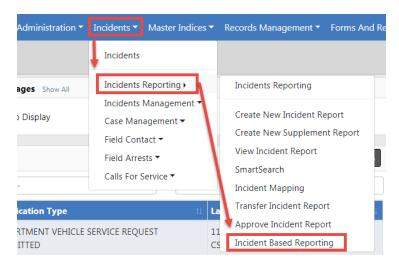
# **Appendix CIncident Based Reporting**

### Overview

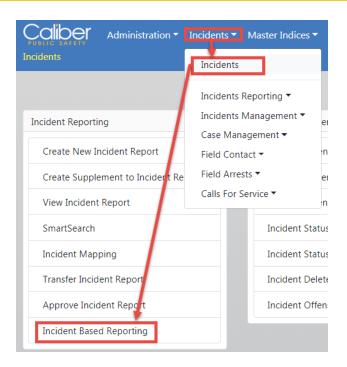
The purpose of this document is to provide instructions on producing Incident Based Reports from the Online RMS application. The application collects FBI data based on the National Incident Based Reporting (NIBRS) requirements.

You access a data set (file) that contains all Agency reports that have a reportable offense that is in approved status. They filter out the reports for inclusion in the file to be used to create the NIBRS Reports. This is typically on a monthly basis but can be filtered as necessary.

- 1. From your *Home* page there are three ways to access the **Incident Based Reporting** module of the application.
  - a. Incidents>Incident Reporting>Incident Based Reporting



b. Click on the *Incidents* tab and when the *Main Incident Menu* opens find Incident Based Reporting under the *Incident Reporting* header.

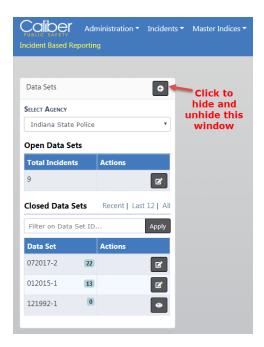


c. If available, click on the **Pending UCR Review** link in the *Quick Links* box. If the **Pending UCR Review** link doesn't appear, you can with appropriate permissions, add this link to the *Quick Links* box. This appears only on your Home Page, no one else's. For instructions, refer to the Quick Link section of "Home Page" on page 8.

**Note:** While UCR functionality is still available within Online RMS, the FBI is no longer accepting UCR Summary Data as of Jan 1, 2021.

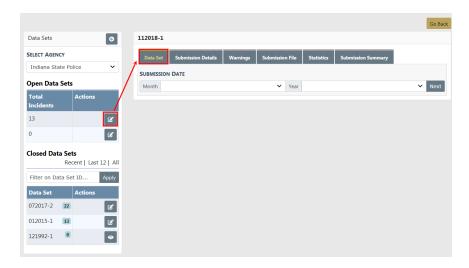


Any option above opens the Data Sets details page:



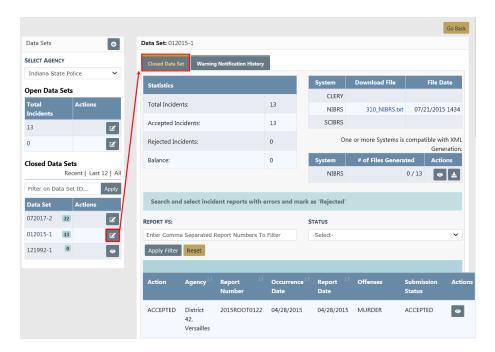
- 2. Accessing Open Data Sets.
  - a. Find the Open Data Set you want to open and click on the Edit icon the Actions column.

The right windows display six tabs of *Open Data Set* topics, defaulting to the **Data Set** tab.



- 3. Accessing Closed Data Sets.
  - a. Find the Closed Set you want to open and click on the Edit icon under the Actions column.

The right windows display two tabs of *Closed Data Set* topics, defaulting to the **Closed Data Set** tab.

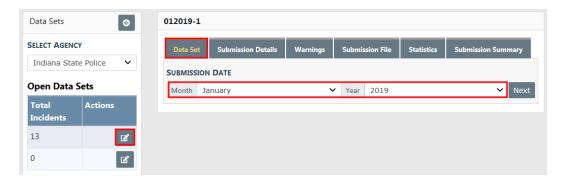


# Role and Permission Requirements

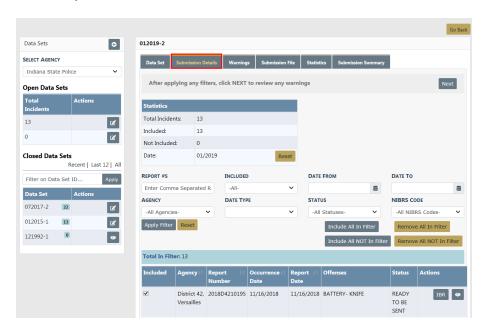
To perform this procedure it is necessary that a user have the role of **LEA\_RECORDS\_MGMT** and/or the permission of **Incident Based Reporting**. The permission can be assigned to any role that the agency administrator would like. Please Contact Online RMS Support for assistance on any changes.

#### **Filter**

 Enter the Month and Year of the reports that you want to report with this file. If you have not completed this action before you need to start at the Month and Year that you began using this application, then create Submission File by Month until you reach the present.

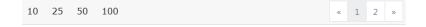


2. Click the **Next** button to filter the reports. The *Search Results* page will then display under the **Submission Details** tab. This may take a minute depending on the number of reports in the selected month.



## Reports on Page Adjustment

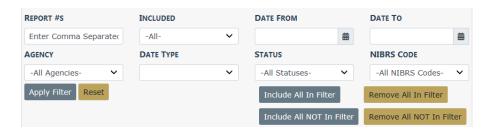
1. You can adjust the number of reports on each page by scrolling down. At the bottom left of the page you can select the number of reports you want to see on a page.



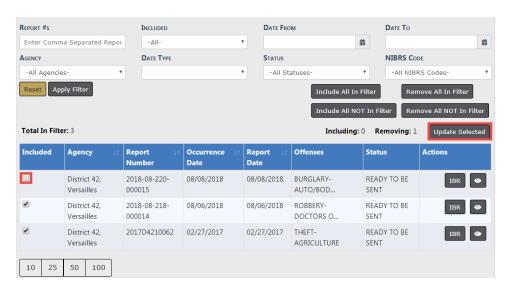
2. On the bottom right of the page the number of pages display based on your previous selection and the number of reports.

### **Additional Filters**

 If necessary you can enter criteria in the additional filter fields and Apply Filter to further define the reports you are reporting.



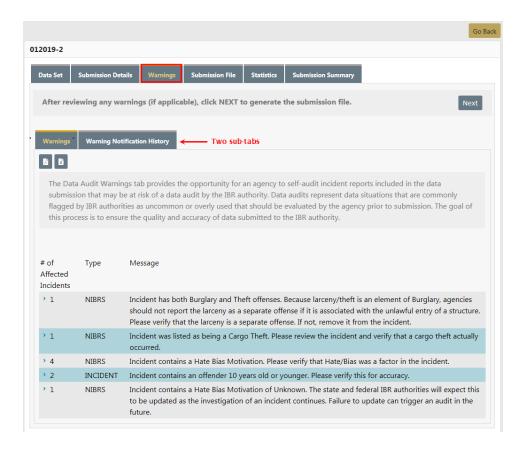
- 2. Unchecking individual reports.
  - a. If find reports you do not want to include, uncheck the checkbox in the *Included* column on the left side. An **Update Selected** button appears on the upper right once you uncheck a box. Click the **Update Selected** button.



3. Click the **Next** button to advance to the **Warning** tab.

## Warnings

The Warning tab provides the opportunity to self-audit incident reports included in the data submission that may be at risk of a data audit by the IBR authority.



- 1. Review the warnings.
- 2. Click the **Next** button to advance to the **Submission File** tab.

#### Generate the Submission File

There are two types of submission files:

Flat Files

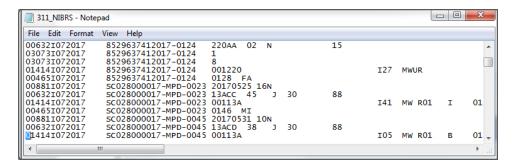
A flat file contains data that is stored in plain text format, and there is one record per line. Columns are typically separated by a tab, comma, or another single value character; Online RMS creates flat files with tabs to separate the columns.

XML Files

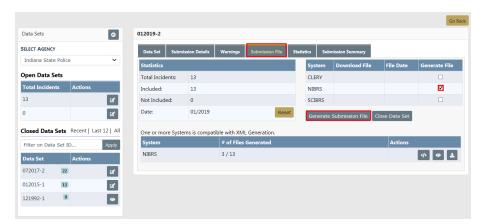
An XML file is an XML (Extensible Markup Language) data file. They are plain text files that store information in a hierarchical standard format that is commonly used in data transfers. Unlike flat files, *custom tags* are used in XML files instead of *tabs* to define different columns of data.

#### Flat File

A flat file contains data that is stored in plain text format, and there is one record per line. Columns are typically separated by a tab, comma, or another single value character; Online RMS creates flat files with tabs to separate the columns.

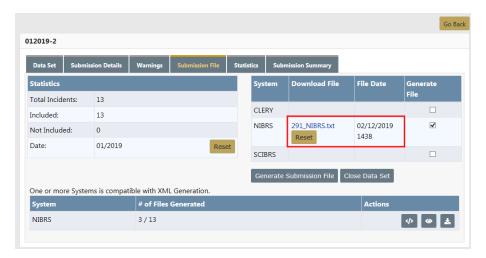


1. To generate the submission file you must first check the appropriate checkboxes in the *Generate File* column, then click the **Generate Submission File** button.

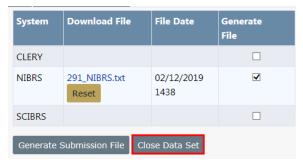


The **Generate Submission File** button and the section above the button appears only when flat file submission is an acceptable file format for your state.

a. Depending on the number of files being included in this file, it may take a few minutes to generate the file. Once complete the **Download File** and **File Date** will fill in.



b. Agencies reporting by **Summary UCR Reports** will then click the **Close Data Set** button on the right side of the page. Note the number in the **Download File** name, as this will help you locate it later when running UCR Reports. You will also be able to locate the correct file as the Month and Year will be added next to the file name along with your ORI.



This will close the Data Set and place it in the *Closed Data Set* list on the left side of the page.



**Note:** With Online RMS 11.7.0 and above, the IBR submission process verifies if an incident with NIBRS data has been modified before including it with the data set for submission to the state. For more information, refer to the *Incident Based Reporting Guide - NIBRS* found under the Help Menu in Online RMS.

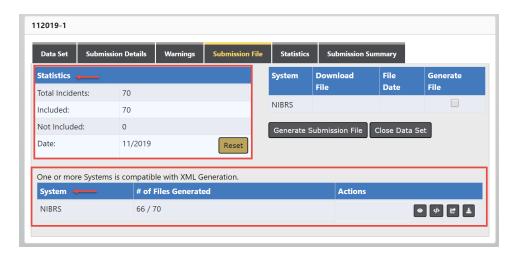
#### XML File

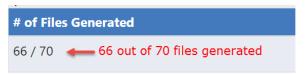
An XML file is an XML (Extensible Markup Language) data file. They are plain text files that store information in a hierarchical standard format that is commonly used in data transfers. Unlike flat files, *custom tags* are used in XML files instead of *tabs* to define data.

```
<?xml version="1.0" encoding="UTF-8"?>
<nibrs:Submission xmlns:s="http://release.
xmlns:nc="http://release.mi
xmlns:j="http://release.
xmlns:cjis="http://fbi.gov/
   <cjis:MessageMetadata>
       <cjis:MessageDateTime>2019-12-19T12:21:42</cjis:MessageDateTime>
       <cjis:MessageIdentification
           <nc:IdentificationID>NCO
                                        2019-0989</nc:IdentificationID>
       </cjis:MessageIdentification>
       <cjis:MessageImplementationVersion>4.2</cjis:MessageImplementationVersion>
       <cjis:MessageSubmittingOrganization>
           <j:OrganizationAugmentation>
              <j:OrganizationORIIdentification>
                  <nc:IdentificationID>NCO </nc:IdentificationID>
               </j:OrganizationORIIdentification>
           </j:OrganizationAugmentation>
       </cjis:MessageSubmittingOrganization>
    </cjis:MessageMetadata>
   <nibrs:Report>
     - <nibrs:ReportHeader>
           <nibrs:NIBRSReportCategoryCode>GROUP A INCIDENT
              REPORT </nibrs:NIBRSReportCategoryCode:
           <nibrs:ReportActionCategoryCode>R</nibrs:ReportActionCategoryCode>
           <nibrs:ReportDate>
               <nc:YearMonthDate>2019-11</nc:YearMonthDate>
```

The **Statistics** section on the *Submission File* tab help you to identify how many reports were in the original query and how many you did not include.

The **System** type section is specific to your agency or State. NIBRS is the basic, and is used by all agencies that report by Summary UCR Reports, and agencies that report directly to the NIBRS Unit at the FBI.



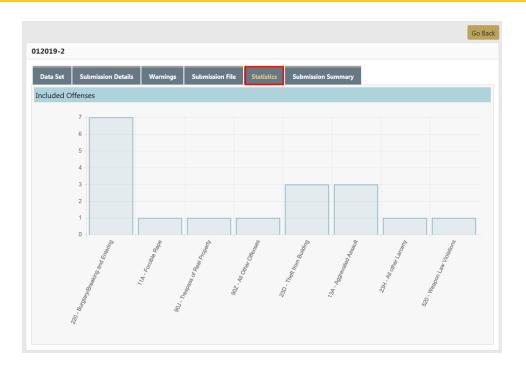


For more information on XML submission files, refer to the *Incident Based Reporting Guide - NIBR*Sfound under the Help Menu in Online RMS.

# **Statistics Report**

The **Statistics** tab is to help you identify how many reports were in the original query and how many you did not include if you unchecked any reports. In the center is the **System** type that is specific to your agency and/or state. NIBRS is the basic and will be used by all agencies that report by **Summary UCR Reports** and those agencies reporting directly to the NIBRS Unit at the FBI.

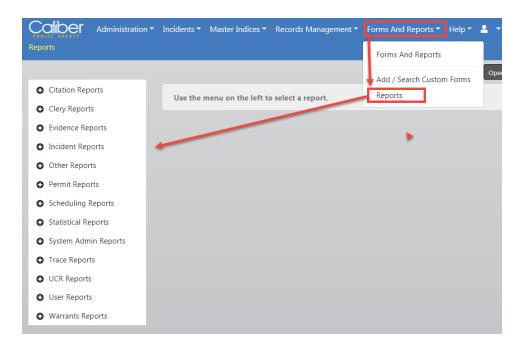
Note: While UCR functionality is still available within Online RMS, the FBI is no longer accepting UCR Summary Data as of Jan 1, 2021.



# Run Summary UCR Reports

**Note:** While UCR functionality is still available within Online RMS, the FBI is no longer accepting UCR Summary Data as of Jan 1, 2021.

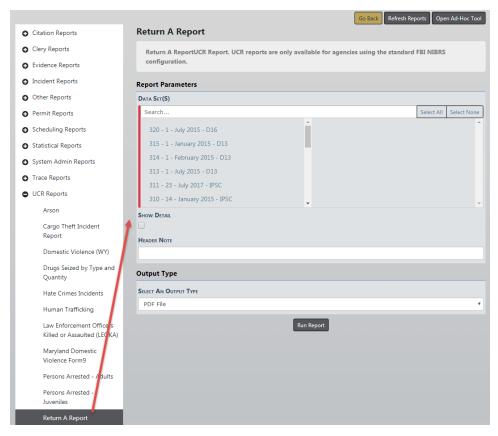
1. From your *Home* page click on the **Forms and Reports** tab at top of screen. Then click on **Reports**.



a. On the left is a list of *Report Category*, click on the **UCR Reports** category banner to display the UCR available reports in alphabetical order.



b. Click on the Report you wish to run, most likely the **Return A**. A filter opens on the right of the window.



c. Click on the **Data Set** file or files you want to include. You can also enter search criteria to shorten the available list.

The format of the listed files:

291 – 13 – January 2019- IPSC (291 is the file number you created, 13 is the number of reports in the file and Month Year is based off the median date of those reports. And then of course your ORI#)



The selected parameters move from the left to the right window. To deselect a parameter, click on the parameter in the right window to move it back to the left.



- d. If **Show Detail** button is selected, the report lists the report number that the returned data was from so that you can verify any information that does not appear to be accurate. The button turns green when selected, otherwise it remains gray.
- e. It is recommended that you enter something into the **Header Help** field to help you identify the report that you are about to create, i.e. January 2019, December 2018, etc. Then click **Run File**.

Note: Creating the file may take several minutes to complete.

f. Once completed open the PDF file that was created then **Print** or **Save**. You will then need to enter this information into the Worksheet file that was provided by the UCR Unit of the FBI or report UCR data to your State Reporting Agency as they have specified.

### Finalize Data Set

 Once you have completed your Reports it is necessary that you Finalize the Data Set that you closed when making the file. Return to the *Incident Based Reporting* page. Find the Data Set that you closed under the *Closed Data Sets* list.

For more information on accessing the *Incident Based Reporting* page, refer to "Overview" on page G.

2. Click the **Edit** icon under the *Actions* column next to that file. It asks you if any errors were reported. As Summary UCR Reporting Agency you do not get an error report, so click the **No** button.

If errors were reported and you want an error report, click **Yes**. For more information, refer to "Errors Reported" on the facing page.

- 3. A warning displays stating this will set all Incidents to *Accepted* and *Finalized*. Click **Yes**.
- 4. The necessary actions on this **Data Set** are now complete.

### **Errors Reported**

- 1. If errors are reported, click Yes.
- 2. A list of the reports appear. You can filter the list by entering one or more report numbers into the **Report#** field. Separate reports with a comma. Click **Apply Filter**.
- 3. Click the Apply Filter button as **Rejected**.
- 4. Click the Update button.
- **5.** A message appears stating the action cannot be undone. Click **Yes** to continue or **No** to cancel.
- 6. You are returned to the report list to accept all the other reports.

## Accepting Reports after Error Reports have marked Rejected

- 1. Once you have rejected the reports with errors you must mark all the other reports as accepted.
- 2. If your file has more than 50 or 100 records go to the bottom of the page and change the page count to 100, then return to the top of the list.
- 3. Click on the button Apply Status to All on Page.
- Open this list and select Accepted.
- 5. Once selected it will mark all the radio buttons as **Accepted**, except the reports you rejected.
- 6. On the right side it will tell you how many reports on that page you will be updating to **Accepted** and the click the **Update** button. You will get the *This action cannot be undone* warning again.
- 7. If you have more than one page, navigate to the next page and repeat the marking as **Accepted**. You will have to change the **LOV** back to *Apply Status to All on Page* and

then back to **Accepted** before the **Update** button will become available again. Continue this until you have marked all reports on all pages as accepted.

- 8. Once you have all the reports marked as either **Rejected** or **Accepted**, click on the **Accept and Finalize** button.
- 9. When the confirmation window appears, confirm you are sure.

#### **Glossary**

A list of definitions for terms and abbreviations associated with Caliber products follows. All terms included here are not necessarily found in the Caliber Online RMS User Guide or the Caliber Online RMS Administrator Guide.

**9-1-1** or **911**— A three-digit telephone number used to report an emergency requiring response by a public safety agency (from *NENA Master Glossary of 9-1-1 Terminology*)

**911 service area** — The geographic area to which the government has granted authority to provide 911 service

**911 system** — A telephone system that automatically connects a person dialing "911" to an established PSAP through traditional telephone service facilities

**abandoned call** — A call placed to 911 in which the caller disconnects before the call can be answered by the PSAP attendant

**access line** — The connection between a customer premises network interface and the local carrier that provides access to the public switched telephone network

**accident reports** — Report category that enables sorting and viewing of accident query and accident state reports

active window — Indicated by a blue title bar, a window with which a user can interact

add-ons — Agency-defined field used to customize RMS for specific local needs,

**AFIS**— Automated Fingerprint Identification System (US FBI)

**AFR** — Abbreviation for *Automated Field Reporting* 

**alarm** — Any notification made to an emergency agency that a situation exists or may exist and requires a response. An alarm can be generated via an electronic alarm system, telephone, radio, word-of-mouth, and so forth.

**alert** — A message, error, or notification of a situation (incoming calls, timer alerts, mail messages, and so forth) that may require immediate attention

**ALI Database** — Alternative name for DMS (Database Management System)

**ALIDBS** — Abbreviation for ALI Database

**alias** — A name, other than that recorded on an individual's birth certificate, by which the individual may be known

**alternate routing** — The routing of a 911 call or message over a designated substitute route when the primary 911 lines are unavailable for immediate use

Amber Alert — Broadcast system for *America's Missing: Broadcast Emergency Response*, Amber Alerts are immediate, up-to-date information to aid in the safe recovery of a missing child. Amber Alerts are dispatched to law enforcement, the media, and the public.

**ANI/ALI** — Abbreviation for *Automatic Name/Location Information/Identifier* or *Identification* 

**AOC** — Abbreviation for *Authority Operation Center* 

API — Abbreviation for application programming interface

**Application** — Generic term for a program or system that handles a specific business function

**Application Programming Interface (API)** — An interface used by programmers to write interfaces between their system and another vendor's system, thereby simultaneously integrating multiple systems

**Application Software** — A complete, self-contained program that can perform work for a user. This is in contrast to system software such as an operating system, server processes, and libraries that exist in support of application software.

AREA — Patrol Area/Zones/Beats

**area of fire origin** — The specific location where a fire started. May be a room, a portion of a room, a vehicle, a portion of a vehicle, or an open area devoted to a specific use. Every fire has an area of fire origin. (From NFIRS 5.0 Ref. Guide)

**arrival time** — The time at which a 911 call is received (if it generates an incident record) or at which an incident is created (if the call generates a manually-created incident)

**arrived** — Status of a unit indicating that it is assigned to respond to an incident and has arrived at the location specified on the incident record

**assigned unit** — A unit that is assigned (dispatched, en route, arrived, and so forth) to an incident. Some systems may be configured to consider units designated as busy (such as out for food, out for fuel, or at the station) as assigned.

**Assigned Units Window** — A CAD window that displays all units assigned to an incident. Some systems may be configured to consider units designated as busy (such as out for food, out for fuel, or at the station) as assigned.

**Attendant Window** — A CAD window that displays alerts to inform users of events or incidents that may require immediate attention

**audit trail** — Automated system records that show if database/fields have been changed, what changes were made, who made them, and when

**automatic** — When applied to fire protection devices, a device or system providing an emergency function without human intervention

**automatic location identifier** — Automatic PSAP display of a caller's telephone number, the phone location, and any additional emergency services information. If phone number is also included, it may be called ANI-ALI.

**automatic number identification** — Telephone number associated with the access line from which a 911 call originates

**automatic vehicle locator** — A product that allows a client to receive Global Positioning Satellite (GPS) coordinates, locating a client unit's position

available unit — A response unit not currently assigned to an incident

**Available Units Window** — A CAD/WebCAD window that displays all units (individuals, stations, and/or cars) not currently assigned to an incident. Some systems may be configured to consider units designated as busy (out for food, out for fuel, at the station, etc.) as assigned.

AVL — Abbreviation for Automatic Vehicle Location

**B&E**— Abbreviation for *breaking* and entering

**bitmap** — A picture representation that displays on the screen instead of text or numeric characters

**BMP** — File extension for bitmap, an image format commonly used on the web and in web applications

**BOLO** — Abbreviation for Be on the Lookout

**building** — A structure enclosed with walls and a roof and having a defined height (from NFIRS 5.0 Reference Guide)

**busy** — Status of a unit indicating that it is not assigned to an incident but is unavailable or may be slow to respond due to its current activities. Busy units include units that are

6 December 2022 User Guide AA

out for food, out for service, at the station, and so forth. Some systems may be configured to consider units designated "busy" as assigned.

**CAD** — Abbreviation for *Computer Aided Dispatch* 

call — An incident phoned into a police, fire, or EMS dispatch center

**Call Detail Recording** — Process of providing a written record, by telephone number, of all 911 calls received by a PSAP

Call Number Sequence — Sequence numbers in CAD to track and record CAD calls

**Call Relay Method** — Process by which a 911 call is answered at the PSAP and the call taker relays the information to the appropriate public or private safety agency for further action

**Call Taker** — The person in an agency that receives a call for an incident. This person may or may not be a dispatcher.

**CFS**— Abbreviation for calls for service

Caliber CAD — Caliber's CAD Solution

**Call Transfer Method** — Process by which the PSAP call taker determines the appropriate responding agency and transfers the 911 caller to that agency

**casualty (fire)** — A person who is injured or killed at the scene of a fire (from NFIRS 5.0 Reference Guide)

**CATP** — Abbreviation for *customer acceptance test plan* 

**charge** — An accusation of wrongdoing, particularly an official statement that accuses someone of committing a crime

**check box** — An interface icon that when clicked turns an option *on (checked)* or *off (empty)*. When two or more checkboxes are offered as selections, the user may check as many choices as are applicable (unlike radio button selections, where the user can only select one option).

CID — Abbreviation for *Criminal Investigation Division* 

CIR — Abbreviation for Criminal Incident Report

**citation** — A writ or ticket for a person to appear in court on a specific date to respond to a charge of breaking the law

citation reports — Report category that enables sorting and viewing the following report types: Charges by Person, Court Schedule, Ticket Inventory, and Officer Activity

**civil process reports** — Report category that enables sorting and viewing the following report types: Civil Process by Sector, Court Schedule, Payments Received, and Papers by IV-D

**civilian fire casualty** — Any non-fire service casualty who is injured or killed at the scene of a fire (from NFIRS 5.0 Reference Guide)

**CIS**— Abbreviation for *Criminal Information System*, a Caliber state switch interface product. CIS has also been referred to as *Avelin*. No product queries NCIC directly. NCIC queries are a result of a properly formatted query to a state switch.

CJS — Abbreviation for *Criminal Justice Information System* 

class — A type (Fire, Law, EMS) of incident or a type of responder

**class group** — The unit associated with an incident. The class group is a subset of the class.

CLR — Abbreviation for clear, a status code

**COC** — Abbreviation for *Chain of Custody* 

**combustible** — A material that will release heat energy on burning (from NFIRS 5.0 Reference Guide)

**complaint type** — Complaint types convey more than just a description of the complaint. Each type has an associated priority, class, ten code, and responding departments. Your agency should determine the information for each complaint type and enter them into the system.

**Computer Aided Dispatch (CAD)** — Electronic dispatching system used to manage an agency's communications center

**computer hardware** — Devices capable of accepting and storing computer data, executing a system sequence of operations on computer data, or producing control outputs, including the computer, monitor, keyboard, printer, cabling, and other peripherals.

Computer Telephony Integration — Also called computer—telephone integration or CTI, is a common name for any technology that allows interactions on a telephone and a computer to be integrated or coordinated. The term is predominantly used to describe desktop-based interaction for helping users be more efficient, though it can also refer to server-based functionality such as automatic call routing.

**configuration** — The functional and/or physical characteristics and interrelationships of project hardware and software

COTS — Abbreviation for Commercial off the Shelf

Criminal Justice Information System — A division of the FBI that has the mission of reducing terrorist and criminal activities by maximizing the ability to provide timely and relevant criminal justice information to the FBI and to qualified law enforcement, criminal justice, civilian, academic, employment, and licensing agencies concerning individuals, stolen property, criminal organizations and activities, and other law enforcement related data. Each state has its own CJS division. (from CJS Web site mission statement)

**CS**— Abbreviation for *CAD Station* 

**CTI** — Abbreviation for Computer Telephony Integration

**daily files** — Daily records update file received by PSAPs from telephone companies. Contains any changes made to subscribers, subscriber phone numbers, or subscriber addresses.

**data** — Numbers, text, graphics, images, and sound stored in a form that can be used by a computer

**data integration server** — An XML-based communications server that allows almost instant integration and use of any new data source

**DBF** — File extension for Data Base File, the dBase file format, used with SHP (see SHP)

data-sharing software — Systems such as NCIC Client that enable information to be sent and received from a single workstation to other workstations, databases and agencies elsewhere

**default routing** — The capability to route a 911 call to a designated (default) PSAP when the incoming call cannot be selectively routed due to ANI failure or other causes

**DEM** — Abbreviation for *Digital Elevation Model* 

**department** — A specific segment of a responding agency, such as any city police department, any county sheriff, and any fire district department

**design** — Tasks associated with specifying and sketching the features and functions of a new application prior to coding

**DGN** — File extension - DesiGN file, the Microstation drawing format

**DIG** — Abbreviation for *Digital Information Gateway* 

**DIS**— Abbreviation for *Data Integration Server* 

**dispatch center** —The location from which a public or private safety agency's mobile units are dispatched.

**dispatch time** — Present duration (in minutes) in which the user must dispatch a unit to an incident before a supervisor receives an alert indicating that the incident is awaiting assignment

**dispatched** — Status of a unit that is assigned to respond to an incident

**dispatcher** — The person in an agency that enters a call for an incident into the CAD system. This person may or may not be a call taker.

disposition — The final outcome of a CAD incident

**dissemination** — Information concerning property or court dockets that is released to individuals involved in the case

**DMV** — Abbreviation for *Department of Motor Vehicles* 

**DNR** — Abbreviation for *Department of Natural Resources* 

**DOB** — Abbreviation for *Date of Birth* 

**DOT** — Abbreviation for *Department of Transportation* 

**DRG** — Abbreviation for *Digital Raster Graphic* 

**drop-down selection menu** — A list of selections that displays when a down arrow on an input field is clicked

**DSP** — Abbreviation for *Dispatch*, a status code

**DWG** — File extension - DraWinG file, the AutoCad drawing format

**DXF** — File extension - Drawing eXchange Format, an AutoCad export file

**E 911** (enhanced 911) — An emergency telephone system that includes network switching, database and CPE elements that can provide selective routing, selective transfer, fixed transfer, Automatic Location Identification (ALI), and Automatic Number Identification (ANI)

**elapsed time** — The duration since the previous contact time. Once a unit is assigned, the elapsed time indicates the time that has passed since the AGN STAT time.

**EM D** — Abbreviation for *Emergency Medical Dispatch* 

**emergency call** — A telephone request for service which requires immediate action to prevent loss of life, reduce bodily injury, prevent or reduce loss of property, and other emergency situations as defined by local policy

Emergency Medical Dispatch — Critical medical advice offered by specially trained 911 call answering personnel. Advice follows approved protocols, given in logical sequence, for such conditions as heart attacks, choking, and child birth. Protocols are administered by phone until the arrival of emergency medical personnel on the scene.

Emergency Service Number — A three- to five-digit number that represents a unique combination of emergency services agencies (Law, Fire, EMS) designated to serve a specific range of locations within a geographical area. ESNs are set up by the telephone company in conjunction with subscriber input and transmitted along with E911 data. ESNs are not always available in the E911 ALI feed.

**Emergency Service Zone** — A geographical territory consisting of a specific combination of law enforcement, fire, and EMS coverage areas

**EMS**— Abbreviation for *Emergency Medical Service* 

**EMS Zone** — Also called *Run Zone*, a specific area by which EMS responsibilities are defined

**En Route** — Status of a unit indicating that it is assigned to respond to an incident and is proceeding to the location specified on the incident record

**ENR** — Abbreviation for *Enroute*, a status code

**environment** — The set of tools and the physical surroundings in which software is developed, tested, and/or deployed

**ESN** — Abbreviation for emergency service number

**ESRI** — Abbreviation for Environmental Systems Research Institute (3rd party supplier of GIS and database software)

**evacuation route** — A route for a specific geographic area that dispatchers can use to instruct citizens in case of an evacuation

**event code** — Unique alphanumeric code that identifies the circumstance or occurrence that resulted in a call for help. Event codes may differ from one agency to another and are established by your agency administrator.

**exposure** — A fire incident that results from a single igniting event. For record-keeping purposes, the initial fire incident(primary ignition event) is "Exposure 1" and each subsequent fire resulting from that initial exposure is sequentially numbered.

**exposure** — (fire) A fire in a building, structure, vehicle, or outside property resulting from a fire outside that building, structure, vehicle or outside property (from NFIRS 5.0 Reference Guide)

**expungement** — Permanently deletes chosen records from the RMS tables; there is no audit trail or logging of this activity.

**Extensible Markup Language** — (XML) A markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable. It is a highly compressible, standard markup language that defines a way of transmitting and representing data used for applications and the internet.

**fatality** — An injury that is fatal or becomes fatal within one year of the incident (from NFIRS 5.0 Reference Guide)

**FDID** — (Fire Department ID) A unique, five-character identifier assigned by the state to identify a particular fire department within that state (From NFIRS 5.0 Reference Guide)

field — An area on the screen into which you can enter information into a system

**Field Reporting** — Caliber applications used for wireless (via Mobile) reporting of various documents, such as incident reports, traffic tickets, and accident reports. Also functions as a stand-alone that can be accessed via a LAN workstation or notebook computer. All information entered into a report is reviewed by a supervisor and fed into a database.

**fire casualty** — A person working for an fire department who is injured or killed at the scene of a fire (From NFIRS 5.0 Reference Guide)

**fire fatality** — An injury that is fatal or becomes fatal within one year of a fire incident (From NFIRS 5.0 Reference Guide)

**fire plan database** — The fire plan database contains detailed information about a specific site for use in a fire of other emergencies. This information will help your agency respond quickly and efficiently to situations that are dangerous or have the potential to become dangerous. Using a fire plan, you can create and store address-specific information that includes data crucial to those responding to a fire.

fire (run) zone — A specific area by which fire responsibilities are defined.

footprint — A specific geographical area covered by a wireless cell or cell sector

**function key** (**F** key) — The computer keys labeled **F1** through **F12**, some of which may be assigned special functions (For example, **F8** is usually reserved for the *Exit* function in Caliber products.)

gcpk — file extension - geocoding package used for location calculations

**geocoding** — GIS operation to locate geographic coordinates associated with an address or point on map

**geoprocessing** — GIS operation to manipulate spatial data, including geocoding, searching, and routing

GIS — Abbreviation for Geographical Information System

**Global Positioning System** — (GPS) A space-based satellite navigation system that provides location and time information in all weather conditions, anywhere on or near the Earth where there is an unobstructed line of sight to four or more GPS satellites. The system provides critical capabilities to military, civil and commercial users around the world. Maintained by the United States government, it is freely accessible to anyone with a GPS receiver.

gpk — file extension - geocoding package used for route determination

**GPM** — Gallons per minute

GPS — Abbreviation for Global Positioning System

**GPS Tracker** — GPS/AVL tracking software

**group** — 1. (CAD) The unit associated with the same specific incident. The class group is a subset of the Class field. 2. (ENS) A list of call recipients that belong to the same area or community.

**GUI** — Abbreviation for *Graphical User Interface* 

**hardware** — Physical equipment used to process, store, or transmit computer program data

hazardous materials — Any material that is an air-reactive material, flammable or combustible liquid, flammable gas, corrosive material, explosive material, organic peroxide, oxidizing material, radioactive material, toxic material, unstable material, or water reactive material; and any substance or mixture of substances that is an irritant or a strong sensitizer or that generates pressure through exposure to heat, decomposition, or other means. (From NFIRS 5.0 Ref. Guide)

hazmat — Abbreviation for Hazardous Materials

**high cross street** — A term used to indicate the next street that intersects a particular street in the direction in which that street's numbers ascend

**hot sync** — Using a third party device manager application, this allows the import and export of applications, files and data between computer servers and a desktop or laptop computer.

**html** — Abbreviation for *Hyper Text Markup Language* 

hypertext — Text that is displayed electronically and contains links

iamap — File extention - Caliber map project file

icon — On a Windows interface, an image or button containing an image that represents various system functions

**in service** — Status of a response unit indicating that it is available for assignment. Often referred to as *On Duty*.

inactive window — Indicated by a gray title bar, a disabled window with which a user cannot interact because another window is selected

**incident** — An event that results in a call for help. CAD assigns an incident number to every call for help so that the call can be assigned to units as necessary. Incident records include details of the initial information given by the caller as well as details of every action the organization takes as a result of the call.

incident number — A unique, sequential number assigned to a specific incident record

**Incident Wizard** — An RMS feature that allows users to configure the system so that the appropriate screens automatically display upon creation of an incident record. This feature helps to ensure that all relevant known incident data is entered into RMS

interface — A connection between two devices or systems

**ISSI** — Abbreviation for *Individual Short Subscriber Identity* 

ISPS — Abbreviation for Caliber Safety Portal System

issue — A problem to be solved or a decision that has not been made

**JMS**— Abbreviation for Jail Management System

**PG** (jay-peg) — Abbreviation for the file extension *bint Photographic Experts Group* which is an image format commonly used on the Web

**jurisdiction** — An overall area of responsibility. An installation could provide service for one or more jurisdictions. For example, an installation could be responsible for just one small county so it would need only one jurisdiction. Another installation could provide service for the county and the major city within that county. This installation could use two jurisdictions, one for the county, and one for the city.

**LAN** — Abbreviation for *Local Area Network* 

**latitude** — The angular distance north or south of the earth's equator, measured in degrees along a meridian, as on a map or globe. Latitude lines run parallel to the equator. Values range from 0 degrees at the equator to 90 degrees at the North and South Poles. Minutes and seconds range from 0 to 59. (From NFRS 5.0 Ref. Guide)

layer — Map (GIS) data layer that can be portrayed in map legend as an individual feature

**LEO** — Abbreviation for *Law Enforcement Officer* 

**LINK** — Abbreviation for Law Information Network of Kentucky

**link** — Text that when clicked takes you to another page, topic, site, and so forth. Also called hyperlinks, links are typically underlined and of a different color than the surrounding text. An image can also be used as a link.

**literal** — A term used to refer to generic field names, or labels, for user-defined fields. Some RMS and JMS modules allow users to set up agency-specific fields. These fields must be assigned names (labels). Thus, a literal is a name/label that an agency assigns to a field.

**local area network** — A computer network that encompasses a discrete area, such as in a building. In a law enforcement agency, this may include Dispatch, CAD, GEO, MIS, and desktop computers.

**location** — The address at which an incident is occurring as provided by the ALI system or the caller

**login** — A process in which a user identifies and authenticates himself/ herself to a computer

**longitude** — Angular distance on the earth's surface, measured east or west from the prime meridian to the meridian passing through a position, expressed in degrees (or hours), minutes, and seconds. Longitude lines run north/south, are parallel at the equator, and converge at the North and South Poles. Values range from 0 at Greenwich, England, to 180 degrees at the International Date Line west of Hawaii. Minutes and seconds range from 0 to 59. (*From NFIRS 5.0 Ref. Guide*)

**low cross street** — A term used to indicate the next street that intersects a particular street in the direction in which that street's numbers descend

**Maps** — Map display of GIS data (raster and vector)

marker — Map icon/symbol used to display specific data (search results, incident, or unit location)

**Master Street Address Guide** (*MSAG*) — Computerized geographical file or database that consists of all streets and address ranges within the 9-1-1 system area. Key to selective routing capability of E911 systems; requires constant updating.

MDT — Abbreviation for Mobile Data Terminal

MM — Abbreviation for Mile Marker

MNI — Abbreviation for Master Name Index

**MO** — Abbreviation for *Method of Operation* 

**mobile property type** — Property designed to be movable whether or not it still is (from NFIRS 5.0 Reference Guide)

move-ups — Move-Ups provide dispatchers with information when handling various types of calls, such as EMS. For example: When a dispatcher requests to view EMS move-ups, the system checks this database to see if the current situation matches any situations in the database. If a match is found, the instructions are displayed to the dispatcher. These instructions can indicate what station should move up a unit to provide back-up coverage. They should also include whatever information your agency normally expects a dispatcher to have access to when dealing with a particular EMS situation.

mpk — File extension - ESRI map package file, vector map graphic data

MSAG — Abbreviation for Master Street Address Guide

Narrative — Additional description or details, in free-form text, associated with an incident

National Crime Information Computer — NCIC is a computerized index of criminal justice information that is available to Federal, state, and local law enforcement and other criminal justice agencies, and it is operational 24 hours a day, 365 days a year. The NCIC system provides a computerized database for ready access by a criminal justice agency making an inquiry and for prompt disclosure of information in the system from other criminal justice agencies about crimes and criminals. This information assists authorized agencies in criminal justice and related law enforcement objectives, such as apprehending fugitives, locating missing persons, locating and returning stolen property, as well as in the protection of the law enforcement officers encountering the individuals described in the system.

National Emergency Number Association — NENA's mission it is to foster the technological advancement, availability, and implementation of a universal emergency telephone number system in the United States. In carrying out its mission, NENA promotes research, planning, training and education. The protection of human life, the preservation of property and the maintenance of general community security are among NENA's objectives.

National Institute of Corrections — The National Institute of Corrections (NIC) is an agency of the United States government. It is part of the United States Department of Justice, Federal Bureau of Prisons. NIC provides support programs to assist federal, state, and local corrections agencies and provides funds to support programs that are in line with its key initiatives.

**National Law Enforcement Telecommunication System** — NLETS is the International Justice and Public Safety Information Sharing Network — a state-of-the-art

secure information sharing system for state and local law enforcement agencies. It provides electronic messaging to allow information exchange between state, local, and federal agencies and support services to justice-related computer programs.

**NCIC** — Abbreviation for *National Orime Information Computer*, located in Washington, D.C.

**NENA** — Abbreviation for *National Emergency Number Association* 

NFIRS — Abbreviation for National Fire Incident Reporting System

NIC — Abbreviation for *National Institute of Corrections* 

**NLETS**— Abbreviation for *International Justice and Public Safety Network* formerly known as *National Law Enforcement Telecommunication System* (https://www.nlets.org)

**NOK** — Abbreviation for *Next of Kin* 

**Objective Jail Classification System** — developed guidelines for assessing jail inmates' individual custody and program needs

OCA — Abbreviation for Originating Case Agency

**OCC Number** — The number of occupants at a location

occupancy — The specific property use of a building or portion of a building

Off Duty — See Out of Service

**officer reports** — Report category that allows access and viewing of Associated Papers and Case Assignment Records

**O.C.**—Abbreviation for *Objective Jail Classification* 

**OMS**— Abbreviation for *Offender Management System* which is replacing JMS

On Duty — See "in service"

**on-site materials** — Any significant amounts of commercial, industrial, energy, or agricultural products or materials on the property, whether or not they became involved in the fire. Note: For more information, refer to the NFIRS 5.0 Complete Reference Guide, available from www.fema.gov/nfirs.

**ORI** — Abbreviation for *Originating Agency Identifier*, a nine-digit code used by agencies on the law enforcement network

**Originating Case Agency** — A term used in RMS Case Management to refer to the first agency to respond to and/or create a report about an incident

**ORION** — Abbreviation for *Originating Agency Identifier On-line Directory* 

**OS**— Abbreviation for *On Scene*, a status code

**out of service** — Status of a unit indicating that it is not assigned to an incident but is unavailable for assignment, often referred to as Off Duty

PACE — Abbreviation for Pro-Active Oriminal Enforcement

patrol area — Geographical area of a jurisdiction that a unit works

**PCB** — Abbreviation for *product change bulletin* 

**PCN** — Abbreviation for *product change notice* 

PCS — Abbreviation for Public Communications Supervisor

pending call — A call to which no units have been assigned

person history reports — Report category that enable sorting and viewing of the following report types: Person Involvement, Crimes by Person, Gender and Race Profile, Arrest History Summary, Civil and Warrants by Defendant, Civil and Warrants by Plaintiff, and Sex Offender Registration

**phases** — The divisions of a software development life cycle into discrete stages (requirements, design, code, test, and so forth)

**pictometry** — Aerial image capture and display, orthogonal and oblique images (3rd party)

**place alias** — A common name for a business, landmark, or general location that a caller may use to identify a place when unsure of the exact location

place file — Function that cross-references a place (alias) name with a location record.

png — File extension - Portable Network Graphics which is a commonly used image format

**pod** — Used in JMS/OMS, this term is equivalent to cell block

**POI** — Abbreviation for *Point of Interest* 

**pop-up** — A window that opens "pops up" when an option is selected or a function key is pressed. A pop-up window usually contains a menu of commands and stays on the screen only until a command is selected.

**priority** — Level of importance assigned to an incident. CAD includes the following priorities: Priority 1 - Emergency. Priority 2 - Important, but not an emergency. Priority 3 - Less important; not an emergency.

**probation** — An alternative to prison/jail in which offenders can remain in the community under court supervision

**process** — The step-by-step sequence of activities (systematic approach) that must be carried out to complete a project

**Product Change Bulletin** — A document summarizing changes (such as fixes, enhancements, and usability improvements) to a product since the last major release (for example, 10.1 to 10.2)

**Product Change Notice** — A document summarizing changes (such as fixes, enhancements, and usability improvements) to a product since the last minor release (for example, 10.1.1 to 10.1.2)

**property** — An item of value that can be FIXED on the Earth's surface, i.e., water, land, roadways, structures, buildings, or MOBILE, i.e., ships, airplanes, trains, trucks, automobiles (from NFIRS 5.0 Reference Guide)

**proximity distance** — Relative distance that determines when the symbols for two or more AVL units merge together to show up as one symbol on the GIS map

**PSAP** — Abbreviation for *Public Safety Answering Point* 

**Public Safety Answering Point** — The initial answering location of a 911 call. Sometimes called a 911 center.

**Quality Assurance** — The process of tracking and oversight functions for monitoring project performance, adherence to commitments, and budget requirements

**radio button** — Interface icon with a round button shape that can be clicked to indicate a choice. A radio button operates like the buttons on a radio tuner, when a button is pressed, all other buttons are disengaged, allowing only one selection at a time.

**Records Management System** — Also known as RMS, a centralized electronic package of modules used to enter, maintain, track and manage data related to criminal incidents, evidence, cases, and so forth

**remark** — A comment or note that may be appended to a unit's log or sent to a unit's pager as an alphanumeric text message

**responding unit** — The unit currently assigned to respond to an incident

**response** — Deployment of an emergency service resource to an incident (from the NFIRS 5.0 Reference Guide)

Caliber Public Safety Glossary Online RMS11.11

rich text format — generic word processing format

**RL** — Abbreviation for *Radio Log* 

**RMS** — Abbreviation for Records Management System

**route** — GIS function used to determine route/directions from one point on a map to another

RTF — Abbreviation for *rich text format*, a file extension

**run cards** — Run cards are sets of instructions for dispatchers to follow based on given situations. Each run card contains one set of instructions.

**run number** — A chronological value assigned to a recorded incident. Also called *OCA number* or *case number*.

**SBN** — A file extension used by files that store the spatial index of the features used by Maps

**SBX** — A file extension used by files that store the spatial index of the features used by Maps

**SDE** — Abbreviation for *Spatial Database Engine* 

SDTS — Abbreviation for Spatial Data Transfer Standard

**scope** — The magnitude of the effort required to complete a project

**sealing** — A means to flag records as sealed. This activity produces no audit trail nor is it logged. Typically, general users do not have access to sealed records, but with appropriate permissions set up in File Maintenance, a user may be allowed access.

**search reports** — A report category that can be used to sort vehicle, charge, person, and property records

**sequence number** — Number identifying a row in the System Monitor table. Clicking on the sequence number displays the incident details. The sequence number is not permanently associated with the incident record displayed in the row. In other words, an incident may be moved to another row and consequently associated with another sequence number as incidents are added to or removed from the table.

**session time out** — Inactive status of an application that occurs when a page is left open and untouched for a customer defined / configured duration (example: 30 minutes). The User Login page displays at session time out, prompting the user to log in again.

sid — File extension - MrSid georeferenced raster graphic file, aerial imagry map data

SME — Abbreviation for Subject Matter Expert

**Spatial Database Engine** — Helps manage spatial data to provide a quicker retrieval of that data from database engines such as Oracle, SQLSever, and Informix

**Spatial Data Transfer Standard** — A standard used to describe earth-referenced spatial data. It was designed to easily transfer and use spatial data on different computer platforms.

SOD — Abbreviation for Special Operations Division

**solvability factors** — Factors that influence whether crimes are more or less likely to be solved. Agencies assign relative weights to these factors. These weights are then used to assess the solvability of a case to determine assignment of investigative resources.

**soundex** — A coded name index based on the way a word sounds rather than the way it is spelled. Names that sound the same, but are spelled differently, like SMITH and SMYTH have the same code and are filed together. The soundex coding system allows you to find a surname even though it may have been recorded under various spellings.

**SOP** — Abbreviation for *Standard Operating Procedures* 

**SQL** — Structured Query Language

**SSM** — System Status Monitor

**specifications** — General term for the wide variety of paper-based descriptions of a program or system

**stacking** — This allows a user to hold/stack an incident for a certain unit. Example: If a unit is on an incident and a second incident is created in that unit's zone/beat, the user can hold/stack the second incident until the unit clears the first incident.

**station** — A particular fire station within a fire department. If used, station IDs are assigned locally.

**teleco** — Abbreviation for *telephone company* 

**telecommunicator** — The person in an agency that monitors phone activity and talks with the callers dialing 911. This person may or may not be a dispatcher.

**testing** — The set of defect removal tasks that include execution of all, or part, of an application on a computer

**TMD** — Abbreviation for Tactical Map Display

**tpk** — File extension - ESRI tile package file, raster map graphic data

Caliber Public Safety Glossary Online RMS11.11

TS — Abbreviation for *Traffic Stop* 

**UCR** — Abbreviation for *Uniform Crime Reporting* 

**UID** — Abbreviation for *Unit ID* 

**Uniform Crime Reporting** — A collective effort on the part of city, county, state, tribal, and federal law enforcement agencies to present a nationwide view of crime. Agencies throughout the country participating in the UCR program provide summarized reports on offenses known to law enforcement and reports on persons arrested. (From the *Introduction of the U.S. Department of Listice's [FBI] Uniform Crime Reporting Handbook – 2004*)

**Uniform Crime Reports** (*UCR*) — An FBI program that collects and disseminates data on arrests and crimes

**unit** — An entity dispatched using a single code. A unit might be one officer, a patrol car, an EMS station, or even a fire station.

use of force — A classification of an incident, indicating that use of force was required

vacant — Not occupied or put to use; with no furnishings or equipment present

validation — Process that ensures that the entered data is correct

**VIN** — Abbreviation for *Vehicle Identification Number* 

**VINE** — Victim Information and Notification Everyday. VINE is a system that allows crime victims across the U.S. to obtain up-to-date information about criminal cases and the custody status of offenders at any time over the telephone, through the Web, or by email.

warrant — A judicial writ authorizing an officer to make a search, seizure, or arrest, or to execute a judgment

warrant reports — A report category of that enables sorting and viewing of the following types of reports: Warrants Served by Officer, Warrants to Expire, Served by Officer/Date Range, Status Snapshot by Date Range, Warrants by Dept/Status, Warrants by Process Dept, and City/County Warrant Report

wildcard character — A character, usually an asterisk, that is used to take the place of other unknown characters to perform searches. For example, to search for a person with the name <code>\_ansen</code> or <code>\_ensen</code> you would use "j\* nsen" to find all occurrences of both.

wildcard search — The Master Vehicle Index (MVI) and Master Name Index (MNI) modules allow for wildcard searches to broaden search terms and find information. In RMS, the wildcard symbol is an asterisk (\*). This symbol is used to search the indices for possible matches to, or hits on, data entries.

wildland — An unsettled, uncultivated region or minimal to no development, covered with timber, woodland, brush, or grass. (From NFIRS 5.0 Ref. Guide)

window — A section of a screen that contains an application or part of an application

wrecker — A vehicle that is used in recovering or removing a wreck, especially a truck with a hoist and towing apparatus used in towing disabled or wrecked vehicles

**XML** — File extension and Abbreviation for *Extensible Markup Language*. XML is a highly compressible, standard generalized markup language to define a way of transmitting and representing data. Designed to transmit data used for applications and the internet.

**zone** — An area to which dispatchers are assigned to dispatch responsibilities; may include an entire city or county or only certain regions, depending on zoning, which is based on the agency's call activity and the agency size

## Index

## Α

access log1	50
account history	59
acknowledgment	22
actions menu	16
activity log5	31
add activity5	31
delete5	32
edit5	32
edit status532, 5	40
add caution codes1	12
add certification	301
add course	300
add crash report659, 6	61
add emergency contact	368
add equipment6	3
add evidence location5	510
add fuel oil mileage655, 715, 7	'34
add hold6	321
add inventory6	319
add next court appearance3	38
add next of kin3	368

add partial	368
add person	
import from external systems	.103
manual entry	100
residence address	
vehicle	98
add service maintenance	707
add service request526, 699,	721
add vehicle	684
add warrant	.570
address	
make most recent102,	359
other countries	.111
address search	96
advanced search400,	553
agency filter	575
ajax	31
alert	12
approval utilities	416
approval/disapprove process	.411
approve service request	702
arrest	455
tracking number	.308
assets	.629
assign attendee	.794

assignment tab527	color coded	18
associated calls for service 249, 364	delete	22
associated incidents252, 258, 361, 668	view	19
association summary90, 93	browser	
attachments67, 117, 325, 402, 582, 671	favorites	2
add67, 311, 620, 721	С	
delete70	cad badge	58
download71	cad to online rms	
edit69	integration interface	167, 185
overview67	calendar tool	
queue68	call list	
update721	clear call	
audit reports504	dispatch call	
create505	edit call	
location discrepancy507	take call	
search505	view call	
auto-save239, 471	calls for service	
automatic number generation196	access	·
В	close	
badge58	create incident	
barcode 390, 490, 492, 494, 496, 498,	manage calls	
500-501, 503, 509, 515-516	overview	
overview515	search	
broadcast message18	camera81,	
add20	cancel course	

case	758	case versus incident	439
assign officers	452	catalog course	791
assignment history	449	caution codes 95, 97, 10	1, 112, 125-127
Associate Field Contact	456	caution flag	81, 585
Associate Incident	453, 455	center on start	161
close incident no follow	-up458	certifications	781, 783
create case activity	465	manage	798
create incident	453	certifications prerequisite	804-805
enter case data	447	certifications rank	806
load	475	cfs	167, 185, 216
my case activity	477	associated with incident	t report218
navigating	459	chain of custody	486, 502, 504
print	448, 478	change custody	747
review	462	change location	499
security level	457	change ownership	497
update case activity	469	change password	51
case activity		charge	554
request update	442	disposition	554
case create	444	charge categories	577
case management	439	charge class	577
access	440	charging agency	577
form	441	charts	
overview	439	interactive	435
case narratives	240, 471	non-interactive	434
case tags	476	check-in	489

citations 325, 543, 758, 8	313 cr	ns	813
add	544 cc	ollapse	120, 128
associate incidents	555 cc	ollapsible menu	11, 16
associate other reports	555 cc	olumn sorting	34
attached forms	556 cc	ommunity reporting	23, 63, 287
attachments	556	taking action	287-288, 296
delete	558 cc	omplaint type	307
details	551 cc	omplete service request	705
duplicate	557 cc	opy incident252	2, 254, 258, 260
edit	546 cc	ost of ownership	655-657
enforcements	543 cc	ourse	781, 783
overview	543	configuration	
print	559	add template	807
racial profiling	554	course instance	786
relate citations	555	manage	787
view	549	prerequisite	803-804
citations to cms interface	313	template	786, 807
citing officer	546 cc	ourt appearances31	9, 325, 329-330
civil process	595	access	329
attempts	605	add	334, 338
court paper	596	add to calendar	331
fees	605	edit	336
mileage6	605	overview	329
overview	595	search	332
status details6	606	view	338

court case 310, 315, 317-318, 329-330,	field contact163
334, 377, 428-429	incident report163
access317	master indices details164
add251, 320	overview153
delete	spider chart155
edit322	criminal complaint297, 318, 339
number	
overview 317, 334	access
search 318, 334	add250, 298, 301, 375
view325	approval levels425, 427
court order757	approve process425
	delete301
court paper	disapprove315, 430
add598	edit304
edit599	Number375
print	overview297
crash application254	review process314, 425
crash details665	search299
crash location666	submit approval313-314, 316, 425
crash report653, 656, 659-660, 689, 709	take action315
crash towing670	
create assignment51	view311
create call170	custom fields . 300, 395, 469, 474, 610 679-680
create case444	custom forms 25, 63, 241, 251, 287-288
create incident button	311, 402, 526, 529, 556
	655, 680-681, 683, 715
crime visualization	non-public submission288
access points	notification288

print65	delete image files77
publicly available23, 63, 287-288	delete log150, 300, 385, 570
recent activites296	delete master index85, 128
routing63, 287	delete rank 807
search 63-64	delete service requests706
submitted by public288, 296	delete vehicle
taking action	delete vehicle information691
view63	device16
D	device adaptation16
daily log11, 45, 538-539, 542	disapproval comments417
officers	disapproval corrections244
dashboard	disapproval notice244
training module782	dispose
day mode2, 13	download image files78
default security template192	due for maintenance 656, 709
definitionsY	dynamic map marker111
delete activity log532	E
delete assignments730	eCitation547
delete attendee796	edit activity log532
delete certification798, 803	edit attendee796
delete code from a code table758	edit call171
delete course787, 794	edit case acitvity469
delete crash report662	edit certification 802
delete equipment675	Add Certification Prerequisite804
delete fuel oil mileage736	Add Certification Rank806

Add Course Prerequisite803	enforcements543, 548
Delete Certification Prerequisite 805	evidence 117-118, 226-227, 229, 231,
Delete Course Prerequisite804	451, 481, 483, 485-486, 489, 491, 493-494, 497, 499, 501-
Delete Rank807	502, 504, 509-511
edit course792	check-out492
add attendee794	quick check-in510
delete attendee796	transfer custody496
edit attendee	evidence property
restrict to group797	create without incident517
edit crash report663	evidence; held property481
edit equipment676	expired certifications
edit fuel oil mileage736	expired courses783
edit impound record613	export search results35
edit lock rule85	expungements282, 757
edit person	court order757
import from external systems103	field arrest
edit person record90	offender or arrestee761
edit service request701	overview757
edit tow record 613-614	un-expunge
edit vehicles688	view person page760
edit warrant586	external searches55
employee36	F
training796-797	favorites 2
end self-assignments730	field arrest298, 339, 391, 758
end vehicle assignment655, 694	add219

approve	424	warrants	365
associated events	360	field contacts	473, 758
Attachments	379	add	392
charges	365	delete	403
chart	340	details	399
•	85, 219, 248, 263- 264, 339, 345, 349	overview	
criminal complaints .	375	print	
delete	384	search	
disapprove	424	update	
duplicate	382	view	
edit	219, 353	filter	
import data 168, 185, 2	248, 264, 339, 349	fleet clerkfleet management	
log	381	dashboard	654-655
names	367	fleet manager role	654
narrative	377	fleet officer overview	714
officer	360	manage crash reports .	659
overview	339	manage equipment	671
pending release	342	manage vehicles	526, 677
print	387	mid-level manager role	713
property	369-371	overview	653
questions	380	permission categories	653
search		fleet manager	653-654
validations	364, 380	fleet officer	654, 714
vehicle tow	372	add fuel oil mileage	724

delete fuel oi	I mileage724	hierarchy icon	787, 799
fleet vehicle	assignments714	home agency	51
self-assign ve	ehicles728	home page	1, 8, 44, 339-341
Update Fuel	Oil Mileage724	charts	16
follow-up case		external links	15
create	443	Manage Layout	44-45
decision	439	quick links	14
ront screen lay	out45	recent activities	14
uel oil mileage	695, 724, 727, 736-737	top navigation	11
G		user ribbon	11
	accounts A	hunter camera 81, 3	39, 354, 818-820
geo search	109	1	
geo verify	101, 108, 170, 181, 571	image icon	237
-	Y	image library 18, 46,	67, 73, 115, 238, 241, 379
	94, 101, 108, 188, 267	delete imagesdownload images	
н		field arrests	
nearing type	307	incidents	78
neld property	117-118, 226-227, 229, 231, 451, 481, 489, 491,	manage	76
	493-494, 497, 499, 501-	overview	73
	502, 504, 509-511	person records	78
	ut incident517	upload image	73
	42	impound id	611
	on696, 725, 727		
nide incident	192		

incident	incident report175, 185, 31
create field arrest 219, 248, 263	actions menu163, 28
default security template192	add court case25
edit field arrest219	add criminal complaint 250, 29
hide192	associated with cfs21
incident approval415	attachments tab241, 28
edit incident419	audit trail19
from incident414	change status27
from notifications413	copy254, 258, 26
from recent activities412	crash reporting25
incident associations361	create19
incident based reporting G	create supplements28
incident delete log434	cross-tab validation189,
incident disapproval notice244	delete initial27
incident management432	disapproval notice corrections 24
assign supplement432	disapprove42
delete incident432	expunge records28
delete log434	header tab19
incident status433	names tab21
status log433	narrative tab23
incident mapping405	offenses tab208, 21
access405	print chain of custody23
filter options406	print labels23
query window409	print receipts23
screen layout405	printing options27

property tab223	index id	519
requirements189, L	index security level	100
rules 189, L	information bubble	231, 233
security190	initiate a new call	170
submit for approval243	insert image	237, 471
summary tab247	integration	
supplement185	cad to online rms	167, 185
tabs197	interdex	104, 107
transfer277	interfaces	813
validation193	cad to rms cfs	813
validations tab242	citation to cms	813
vehicles tab223	interdex queries	816
view261	lexisnexis queries	822
incident search266	overview	813
incident security193, 430	introduction	1
incident smartsearch267	calendar tool	30
incident status 273-274, 433, 757	check boxes	31
incident status log433	column sorting	34
incident versus case439	entering dates	30
incidents	export search results	35
close without follow-up case 458	floating buttons	31
overview185	function buttons	31
quck select names216	login page	1
status history433	notifications	23
top buttons 187	overview	1

password reset 6	L
password rules 5	labels502, 504, 506, 755
personnel management36	lexisnexis 822
radio buttons31	livescan
smartsearch35	location499
text fields31	location list of value227
User Account Inactivity Deactivation 8	lock hours724, 727, 736-737
inventory management629-630, 646	login page
add630, 633	day mode 2
browse 637	introduction 1
check-in642	night mode2
dispose consumable651	production site
edit636	training 2
inspections and audits645	logout13
overview629	lost and found property739
packs 644	add744
roles	delete
search632	dispose749
self check-in650	edit746
self check-out647	incident report226, 755
transfer 650	mass functions752
inventory roles629	overview739
J	search741
jail tracker104, 107	standalone module access739
jurisdictions52	lov

M	manage fuel oil mileage 654	, 731
make most recent icon102, 359	manage vehicles	677
manage calls for service169	add custom forms	.681
manage certifications	add service maintenance	707
add801	add service request	.699
delete798, 803	add vehicles	.684
edit802	approve service request	702
search799	complete service request	.705
manage courses787	delete service requests	.706
add course789-790, 800	delete vehicles	.687
cancel course798	edit service request	.701
delete course787, 794	edit vehicles	.688
edit course792	search vehicles	677
search courses787	update service maintenance	. 711
manage crash reports659	map marker111, 181	, 572
add661	mass actions	. 515
delete	mass entry	.230
edit663	master indices81, 399	, 551
search	accessing	84
view660	add	97
manage equipment671	add address	.107
add equipment673	add person	97
delete equipment675	add photos	. 112
edit equipment676	add property	116
search equipment672	delete85	, 128

duplicate records	118	N	
overview	81	narrative image	237, 471
print person record	129	narrative tab	236
searching	85	narrative template	239
security	83	navigation icons	39
subscribe	132	forms and reports button	42
mega menu	516	help options	42
mid-level fleet manager	713	home button	39
mid-level manager	654	incidents button	39
mobile device friendly	16	master indices button	40
mobile results	96	record management butto	on41
mode	2	user information menu	43
default	3	near expired certifications	783
set preference	3	near expired courses	783
toggle	4	network	153
modus operandi	214	associations	153
mug shot search	88	nibrs189, 193, 2	18, 365, G, L
my court appearances	330	night mode	2, 13
my profile	7-8, 44, 49	notification 12, 23, 27, 28	
account history	59		482, 576
external searches tab	55	add	
officer information tab	57	delete	
preferences tab	53	search	
profile information tab	53	show all	
subscriptions tab	56	types	23

0		view	716
obtn	308-309, 314, 822	officer group link	469
odl	521, 523, 525	officer information tab	57
offense details	212	officer vehicle assignme	ent692, 694
officer daily log	521	one line search	96
access existing log	525	options button	
activity log tab	531	manage home scree	n44
assignment tab	527	P	
close	538	password	51
create new log	523	forgotten	
help and tips	542	reset	
overview	521	rules	
post	535	security questions	
print	537	permits	
search	533	add	
service request	530	edit	
un-post	536	overview	
vehicle and equipm	ent 528	search	
officer filter	575	person	759
officer fleet vehicle		active alerts	
add records	719	caution code	
add service request	t721	details	
delete data	731	import	
update records	719	new	
update service requ	uest722		106

Caliber Public Safety

search86	print case448, 478
mobile results96	print chain of custody235, 511
personnel management	print labels235, 511-512
photo lineup135	print property labels
access log150	print receipts 235, 502, 504, 511, 513
access points135	print vehicle tow613, 615
create	profile49, 53
delete	property locations509
delete log150	property man- 481, 483, 485-486
edit146	agement 511
overview135	add224
person quick view141	check-in from notification 481, 489
photo count139	mass entry230
print146	print labels370
remove photo143	release
search144	publicly available23, 287-288
uploaded image library141	Q
view146	queue68
physical description search88	quick reference
pin to home page 10, 82, 93, 187-188,	quick search96, 400, 510, 552
198, 263, 441, 448,	·
461, 465	quick select names216
place a hold621	R
power search89	ranks806
preferences tab53	recent activities 296, 299, 304, 311, 339
previous comments417, 422	340, 412

release holds	612, 622	search for a warrant	584
release property	370-371	search incidents	266
release vehicle	612	search mug shots	88
reports	809	search property	225
overview	809	search radius (feet)	97
sort output	810	search vehicles	677, 733
requested processing	501-502	secondary review	412, 416
requests	655	security level	83, 100
require acknowledgment	22	security questions	51
required fields	33	self-assign vehicles	728
reset address fields	122	service maintenance	670
reset service interval mileag	e709	reset interval mileage	709
reset vehicle fields	102, 124	service repair	707, 711
restrict to group	797	service request	530
revert selection	122, 124	service request notification	
review routing	412, 416	take action	702
S		Set Mode Preference	2, 13
schedule disposition	502, 504	show fields button6	397, 725, 735
search all vehicles	,	show my case activities	465, 477
officer	717	silent subscription	133
search certifications	799	smartsearch35, 85, 1	04, 107, 267
search courses	787	sorting columns	32
hierarchy icon	787, 799	spell check	239
search crash reports		spider chart	153, 155
search equipment		filter	16

network association153	supplement189	5, 283, 473
re-center 161	rules	285
re-size160	templates	285
reposition161	supplement reports	283
structure159	support ticket	43, 61
terminology159	system id	519
stacks	Т	
statewide search104, 107	take action	296, 702
submission file P	team support	43
xml fileM	template	786
submit ticket43, 61	terms and abbreviations	Y
subscriptions56-57, 118, 132-133	ticket	43, 61
summary of associations90, 93	token	310
supervisory functions 411	training accounts	А
charts434	training dashboard	
criminal complaint	expired certifications	783
Submit to State	expired courses	783
criminal complaint approval425	near expired certifications .	783
criminal complaint disapprove 430	near expired courses	783
field arrests approval	upcoming courses	783
incident approve/disapprove411	training module	781
incident management	courses	786
incident security430	overview	781
overview411	training dashboard	782

training videos771	update crash report	663
acknowledge772, 777-778	update equipment	676
benefits771	update impound record	613
library 771-773, 777	update service maintenance	711
optional772	update service request	722
overview771	update tow record	613-614
requirements771	update vehicles	688
watch777	upload image	18, 73
U	uploaded image library	141
ucr365	use of force	267
accepting W	user account inactivity deactive	vation 8
errorsW	user id	5
filter	user inventory management	646
finalize data set V	user jurisdictions	52
overview G	user ribbon	
page adjustments K	user information menu	11
permissions J	V	
run summaryR	validation	193
statistics reportQ	vault	504
submission fileM	vehicle assignments	714
warningsL	end	694
un-expunge769	fuel oil mileage	695
unpin10, 82, 93, 188, 441	not assigned	679
upcoming courses783	officers	692, 694
update case activity469	vehicle impound	607

/€	ehicle tow	607, 670
	delete	611
	delete log	610
	edit	613
	enter new	612
	holds	620-621
	log	620, 625
	overview	607
	place a hold	621
	print	613, 615, 626
	release holds	622
	release vehicles	624
	search	609
	update existing	614
/i	ew call for service	183
/i	ew case assignment histo	ry449
/i	ew crash reports	660
/i	ew delete log	570
/i	ew person record	90
/i	olation	554
Ν		
N	arrants	569
	activate	81, 584
	add	572
	attachments	591

caution flag	81, 585
delete	592
delete log	594
duplicate	582
edit	577, 586
log	581, 585, 589
overview	569
report	592
search	570, 584
serve	586
web service	813
wizard	. 193, 195, 198, 284
x	
xml file	