



## Online RMS

11.14.0

Admin Guide

5 December 2023



# Caliber Public Safety

## Online RMS 11.14.0

### Admin Guide

5 December 2023

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- Any efforts made to correct a situation
- Duration of the problem

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# Chapter 1. Introduction

## Access Administration

Use the following procedure to access Online RMS Administration.

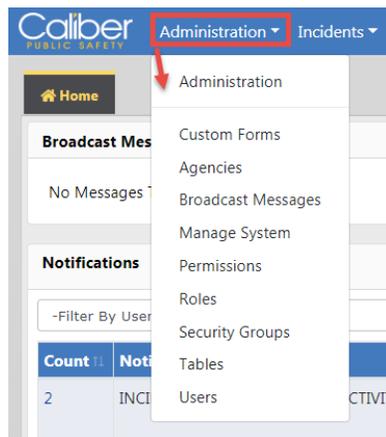
1. Open the RMS application to the *Homepage* to display the Navigation bar as shown.



**Note:** The icons/labels vary in the Navigation bar depending upon which areas your assigned roles allow you to access. For example, if none of your roles include working with incident reports, you would not have an Incidents icon/label in your Navigation bar.

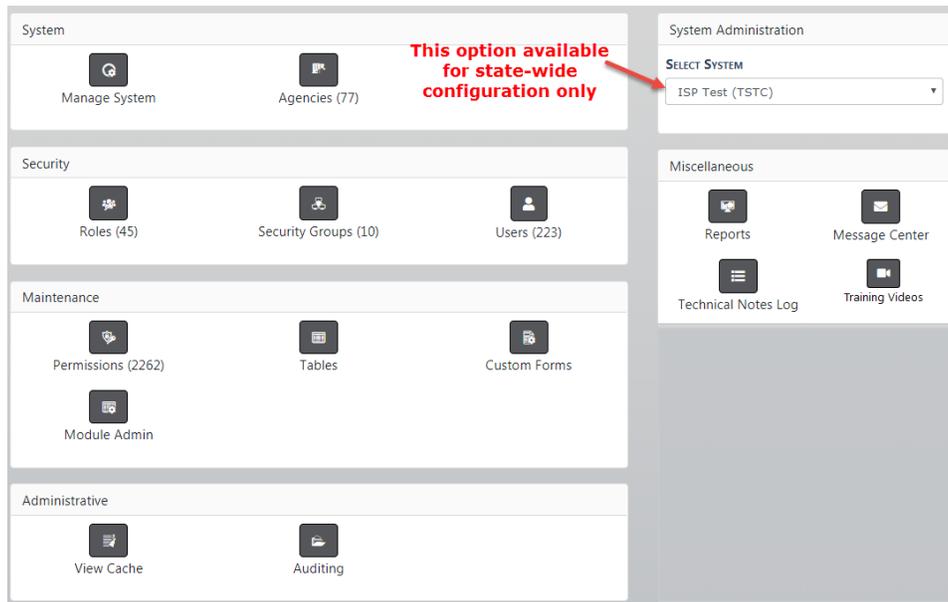
2. Perform one of the following steps:

- Click on the *Administration* label to display the drop-down menu and select the appropriate option.



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

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



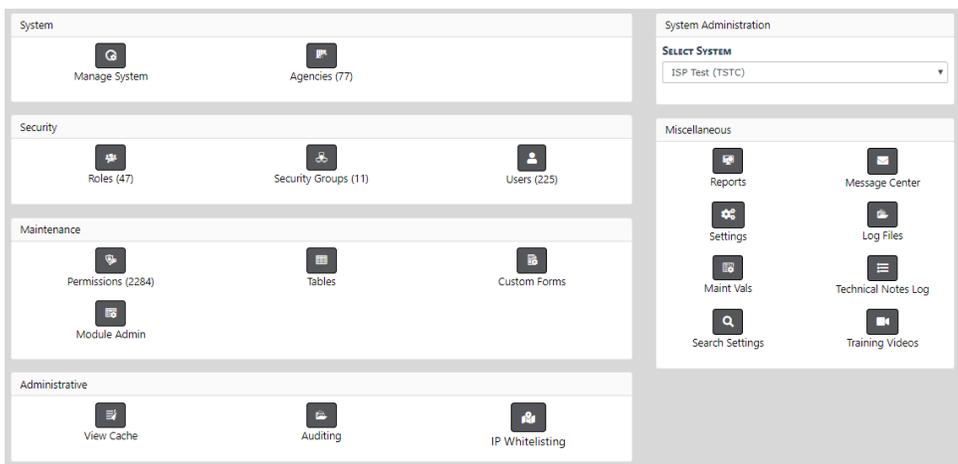
**Note:** The appearance of the menu and page varies depending upon your agency's set-up.

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

## Levels of Administration

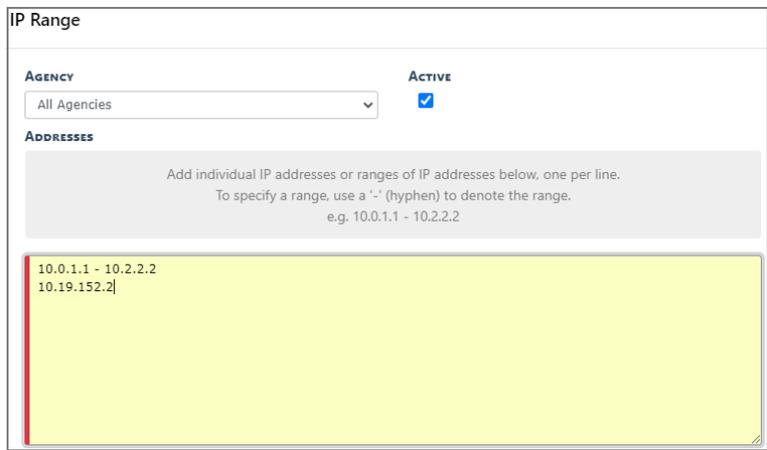
### Company Level

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



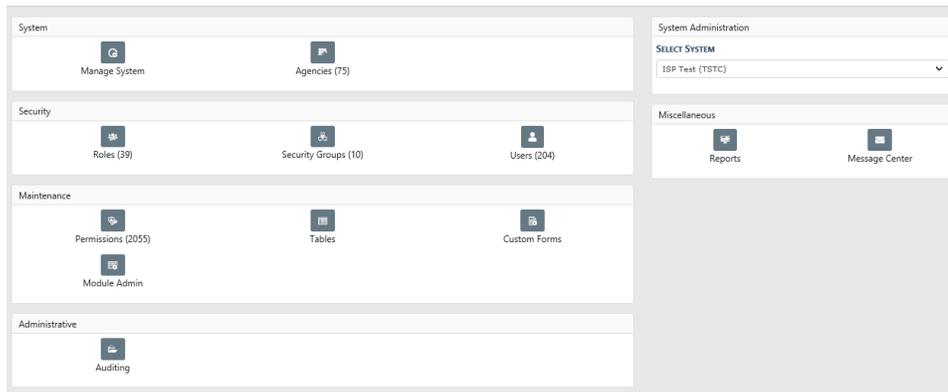
For agencies having security requirements to not allow access to Caliber Online RMS outside of approved networks, Caliber Public Safety personnel can define the following settings via the **IP Whitelisting** icon under the *Administrative* section:

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



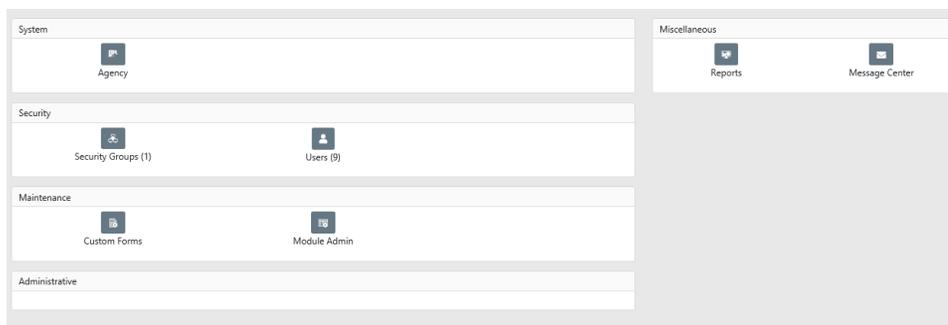
### Schema Level

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



## Agency Level

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



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

## Roles and Permissions

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

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

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

- A user must be assigned at least one role in order to perform tasks within the system.
- A user can be assigned more than one role.
- Two different roles may include one or more of the same permissions, but within a specific agency, each role is unique in its permissions make-up.
- Certain users may be able to delegate some or all their permissions/privileges to another user for a period of time.
- Users cannot modify roles that are above their maximum Role Access Level.
- Users cannot select a Role Access Level that is above their maximum role access level when creating a new role or modifying a role to which they have access.

## 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.

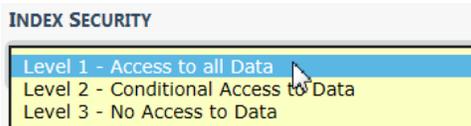
### Master Indices Security Levels

SECURITY LEVEL
Level 1 - Access to all Data
Level 2 - Conditional Access to Data
Level 3 - No Access to Data

- **Level 1**
  - No security restrictions to the master index record.
  - The default level for new master indices records.
- **Level 2**

- Conditional security in place to restrict viewing of involvement data from the indices summary page.
- **Level 3**
  - Restrict viewing of the master indices in searches and displaying on event records.

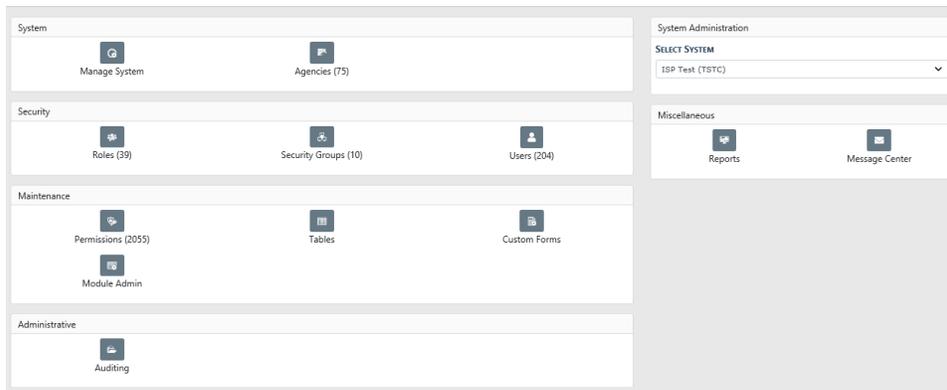
## User Account Index Security Levels



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

# Chapter 2. System Administration

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



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

## System Information

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

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

The screenshot displays the 'System Information' tab in the Caliber Public Safety administration interface. The interface includes a navigation menu at the top with options like Administration, Incidents, Master Indices, Records Management, Forms And Reports, and Help. The main content area is divided into several sections:

- System Information:** Contains fields for COUNTY CODE (350), COUNTY NAME (ISP Test (TSTC)), COUNTY DESCRIPTION, WEBSITE, PHONE, and FAX. The County Code and Name are read-only.
- System Administrators:** Features a dropdown menu labeled '--Select User--' and an 'Add' button.
- Mailing Address:** Includes fields for ADDRESS 1 (111), ADDRESS 2, CITY (Indianapolis), STATE (Alaska), and ZIP (82116).
- Application Settings:** Contains fields for INDEX ALLOWABLE HOURS (100), PASSWORD ATTEMPTS ALLOWED (3), JUVENILE AGE (17), and INACTIVE DAYS ALLOWED (60).

At the bottom of the form, there are 'Go Back' and 'Update' buttons.

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

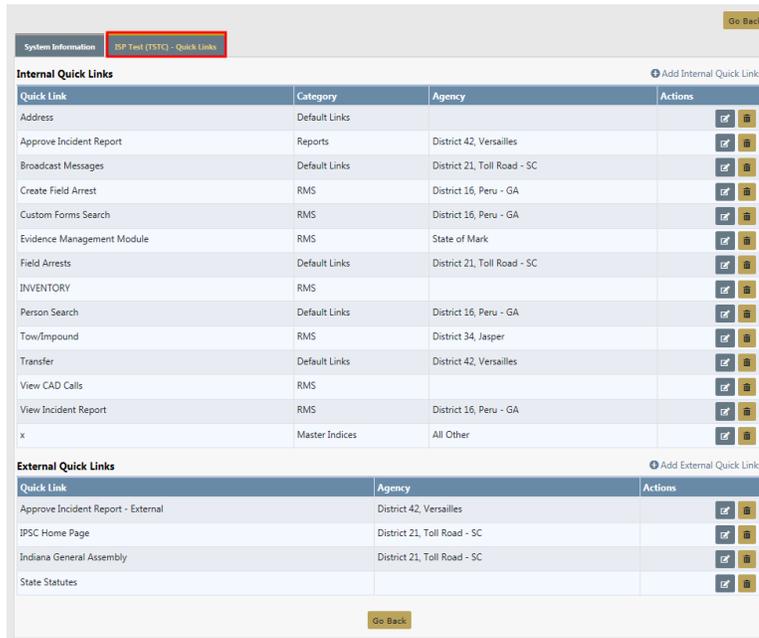
## Quick Links

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

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

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

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



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

a. To **Edit**

- In the **Internal Quick Links** or **External Quick Links** grid, locate the link you want to edit and click the edit icon under the *Actions* column display the *Edit Internal Quick Links* window.

Internal Quick Link Internal Quick Link

**QUICK LINK NAME**

**LINK**

**CATEGORY**

**AGENCY**

Internal Quick Link External Quick Link

**LINK NAME**  
Approve Incident Report - External

**URL**  
https://1[redacted]/rms/ApprovalIncReport.do?dispatchto=getRecen

**AGENCY**  
District 4

Cancel Save

- Select and type changes in the fields as needed.

b. To **Add New**

- Click **Add Internal Quick Links** for an internal link, or click **Add External Quick Links** for an external URL to open the associated Quick Link window.
- Give the Quick Link a **Name**.
- Provide the remaining information.

3. Click **Save** to save the changes.

**Note:** The users with appropriate permissions can choose which available Quick Links they want to display on their Home Page. Refer to the *Caliber Online RMS User Guide* for more information.

# Chapter 3. Attachments

## Attachments Overview

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

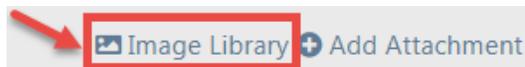
Attachments appear in a grid, or columnar format.



Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1		09/25/2012	  

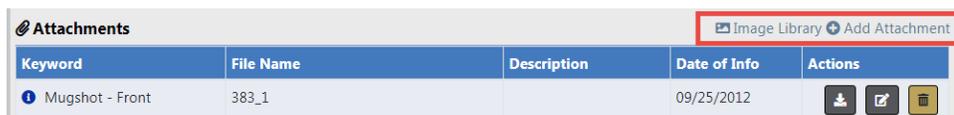
You can edit and delete attachments that were only created by you. Users with administrator privileges have the ability to edit and delete attachments for any user.

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



## Add Attachments

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

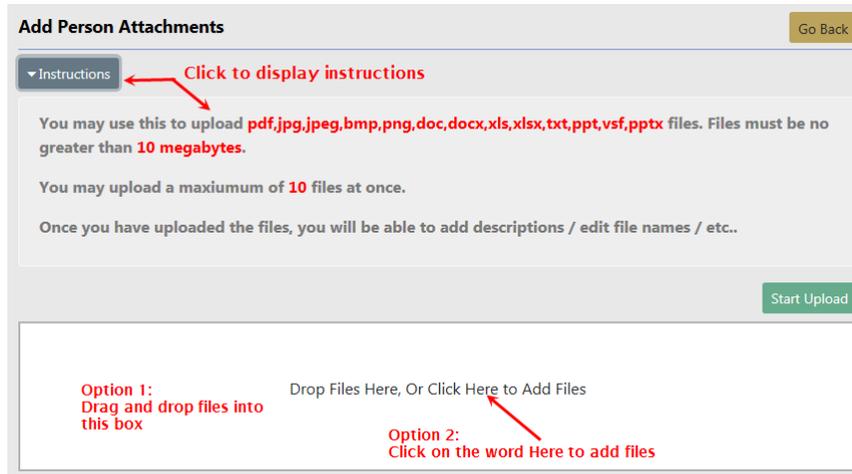


Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1		09/25/2012	  

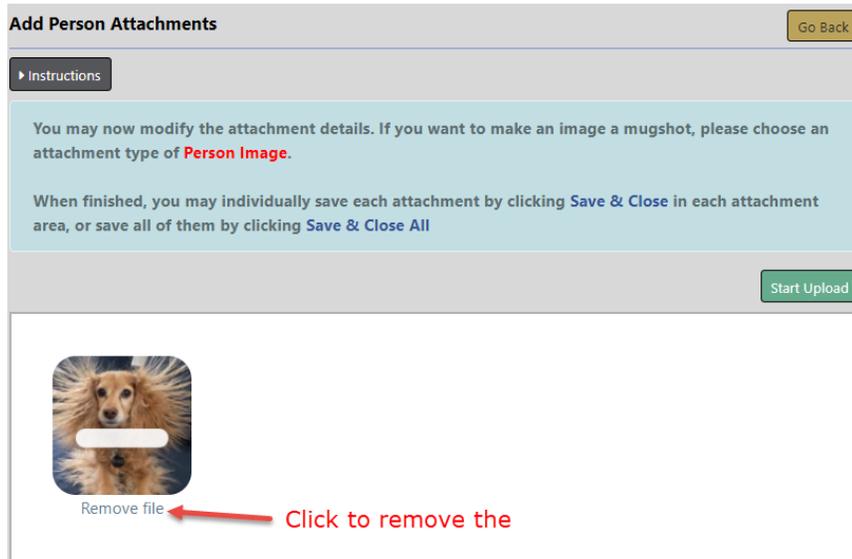
1. Click on the **Add Attachment** link to begin the upload process. For information on the **Image Library** link, refer to "Attachments Overview" on the previous page.

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

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



- 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 screenshot shows a form for adding an attachment. It includes the following fields and options:

- TYPE OF ATTACHMENT:** Person Image
- KEYWORD:** Image
- FILE NAME:** Fred\_Flintstone.png
- DATE OF INFO:** 06/14/2021
- PHOTO TYPE:** Mugshot - Profile
- PRIMARY IMAGE:**
- PHYSICAL DESCRIPTION:** Height: 5' 04"; Weight: [dropdown]
- DESCRIPTION:** [text area]

Buttons: Save & Close (bottom center), Save & Close All (top right and bottom right).

- d. Click **Save & Close** to save each attachment individually, or click **Save & Close All** to save all of them at once.
- e. The attachments then appear in the **Attachments** grid. You can view additional information, download, edit, or delete the attachment.

**Note:** Up to ten (10) items or a maximum of 10 megabytes per file can be uploaded at one time. Agencies may purchase a Rich Media Package that allows file uploads with a max of 50 MB per file and rich media file types.

## Edit Attachments

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

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

Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1		09/25/2012	  

**Note:** You cannot update attachments created by another user.

- 2. Make the necessary updates in the **Edit** window.

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

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

## Delete Attachments

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

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

Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1		09/25/2012	Download, Edit, Delete

**NOTE:** You cannot delete attachments created by another user.

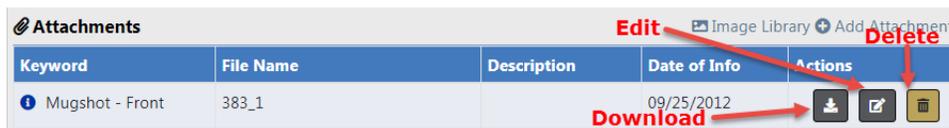
2. A confirmation window appears. Click **Yes** to delete or **No** to return to the previous window without deleting.

Message From RMS
Are You Sure
<input type="button" value="No"/> <input type="button" value="Yes"/>

## 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.



Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1		09/25/2012	  

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



# Chapter 4. Manage Agencies

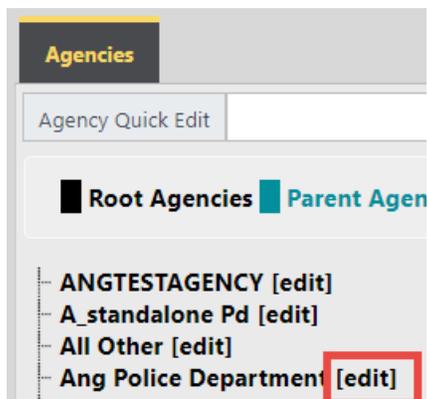
## Manage Agencies Overview

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

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

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

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



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

## Agency Profile

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

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

## Agency Information Tab

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

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

### Agency Information

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

### Agency Administrators

This section is comprised of a grid or table listing all agency administrators. When agency administrators are listed, click  in the **Actions** column to open the *Manage User* page for the agency administrator listed in that row. The *Manage User* page allows you to enter/edit profile information, security settings, preferences, subscriptions, and employee information for the selected user. ("Manage Users" on page 93 for more information.)

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

### Agency User Subscriptions

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

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

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

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

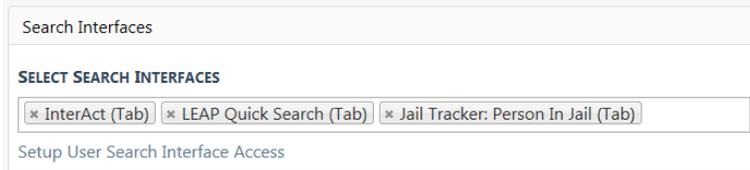
You have reached the maximum number of active named user accounts for your organization. Please contact support to add additional user accounts or deactivate an existing user account.

### Features

The section enables Online RMS personnel to enable the features.

## Search Interfaces

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



Search Interfaces

**SELECT SEARCH INTERFACES**

× InterAct (Tab) × LEAP Quick Search (Tab) × Jail Tracker: Person In Jail (Tab)

[Setup User Search Interface Access](#)

## Attachment Interfaces

### Jail Tracker - Facilities to Search

### State Submissions Configuration

## Miscellaneous

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

### NIBR City Indicator

## Address Information

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

## Agency Logo

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

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

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

## Sub Agency Tab

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

Use the following procedure to add a sub agency.

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



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

Add Sub Agency

---

**SUB AGENCY**

ANGTESTAGENCY ▼

**TYPE**

- Select - ▼

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

## Agency Organization Tab

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

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

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

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

**Current Org Settings:** Display the current settings.

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

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

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

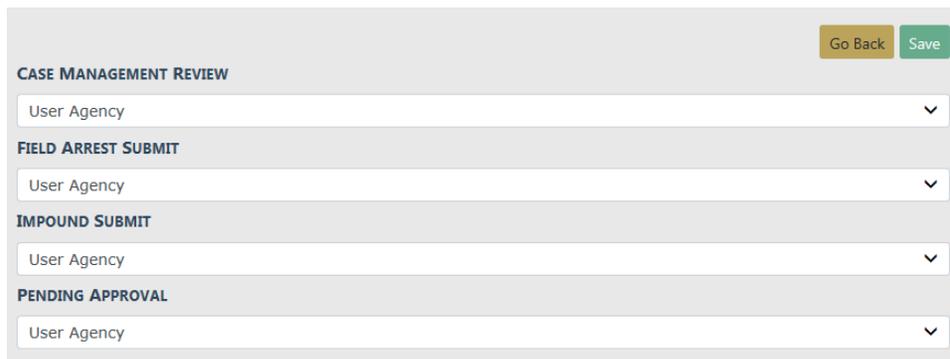
**Current Display Header (This Org Unit)**

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

**Active Display Header (This Org Unit Or a Parent)**

## Route Settings:

[Edit Route Settings](#) link opens the *Agency Route Settings* page where you can select the appropriate value for **Case Management Review**, **Field Arrest Submit**, **Impound Submit**, and **Pending Approval**.



The screenshot shows a form titled "Agency Route Settings" with four sections, each containing a dropdown menu. The sections are: "CASE MANAGEMENT REVIEW", "FIELD ARREST SUBMIT", "IMPOUND SUBMIT", and "PENDING APPROVAL". Each dropdown menu is currently set to "User Agency". In the top right corner, there are two buttons: "Go Back" (yellow) and "Save" (green).

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

## Number Generation Tab

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

### ***Add Number Generation***

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

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

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

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

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

Type	Format	Next Number	Placeholder	Effective Date	End Date	Actions
Dispatch #	YYYY0000000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Dispatch #	YYYY0000000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Evidence Audit Report #	YYYYIR000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Evidence Audit Report #	YYYYIR000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Incident	YYYY0000000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Incident	YYYY0000000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
LEA Case Number	0000YY	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Officer Daily Log #	YYMMIR0000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]

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

Number Generation

TYPE: Warrant

FORMAT: 000YYYYMM

PLACE HOLDER: -

NEXT NUMBER: 1

EFFECTIVE DATE: 04/01/2019

END DATE: [Empty]

Buttons: Close, Save

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

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

- In the select format field under the **Format** column, click **▼** and select a format from the list.

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

**Note:** If using the *Create Incident* option from publicly available custom forms and users manually enter the Incident Number from Caliber CAD, select a **Format** that matches the **Tracking Number** format configured in Caliber CAD.

7. Enter the **Place Holder**.

**Note:** If using the *Create Incident* option from publicly available custom forms, enter a **Place Holder** such as **CR**. This placeholder value replaces the **IR** value in the selected format.

8. In the **Next Number** field, type the beginning number for this series of numbers (e.g. 1).

**Note:** If using the *Create Incident* option from publicly available custom forms and users manually enter the Incident Number from Caliber CAD, enter **0** (zero) as the **Next Number**.

9. In the **Effective Date** field, use the calendar tool to specify a beginning date.
10. Optionally, use the calendar tool to specify an **End Date**.
11. Click **Save** to add this generation of numbers.

**Note:** You cannot create a number generation when a valid, unexpired already exists. You can edit an existing entry to add an expiration date, then create a new one to pick up where the last one left off.

### ***Edit Number Generation***

Use the following procedure to edit a number generation.

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

Type	Format	Next Number	Placeholder	Effective Date	End Date	Actions
Dispatch #	YYYY0000000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Dispatch #	YYYY0000000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Evidence Audit Report #	YYYYR000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Evidence Audit Report #	YYYYR000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Incident	YYYY0000000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Incident	YYYY0000000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
LEA Case Number	0000YY	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]
Officer Daily Log #	YYMMIR0000	1	-	1/1/11 12:00:00 AM		[Edit] [Delete]

4. Locate the listing of the number generation that you want to edit in the **Number Generation** grid.

5. Click  in the **Actions** column to the far left in the same row as the listing to pull the details of that record into the fields at the bottom of the page as shown.

Number Generation

TYPE	FORMAT
Warrant	000YYYYMM
PLACE HOLDER	NEXT NUMBER
-	1
EFFECTIVE DATE	END DATE
04/01/2019	

Close Save

6. Make changes as needed. (Use the drop-down selection lists and calendar icons where available to ensure consistency and accuracy.)

7. Click **Save** to save the changes and refresh the display with the new values.

### Delete Number Generation

Use the following procedure to delete a number generation record.

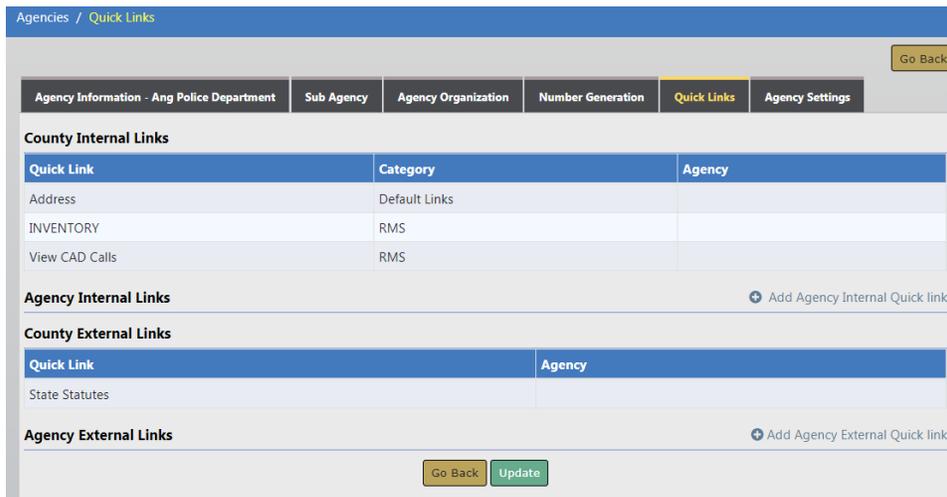
1. On the *Administrative Home* page, click the **Agencies** icon to display the *Manage Agencies* page.
2. Click **[edit]** the same row as an agency listing to open the *Agency Profile* page for that agency.

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

The listing no longer appears in the **Number Generation** grid.

## Quick Links Tab

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



Agencies / Quick Links Go Back

Agency Information - Ang Police Department   Sub Agency   Agency Organization   Number Generation   **Quick Links**   Agency Settings

**County Internal Links**

Quick Link	Category	Agency
Address	Default Links	
INVENTORY	RMS	
View CAD Calls	RMS	

**Agency Internal Links** Add Agency Internal Quick link

**County External Links**

Quick Link	Agency
State Statutes	

**Agency External Links** Add Agency External Quick link

Go Back   Update

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

### Edit Quick Link

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

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

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

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

### Add Quick Link

Use the following procedure to add a quick link.

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



Internal Quick Link

QUICK LINK NAME

LINK

SELECT LINK

CATEGORY

DEFAULT LINKS

AGENCY

State of Mark

Cancel Save

- Click the Add Agency External Quick Link to open the *Add Agency External Quick Link* window.

External Quick Link

LINK NAME

URL

AGENCY

State of Mark

Cancel Save

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

## Agency Settings

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

The screenshot shows the 'Agency Settings' page for 'Indiana State Police'. It features a navigation bar with tabs: Agency Information, Sub Agency, Agency Organization, Number Generation, Quick Links, and Agency Settings (selected). A 'Go Back' button is in the top right. Below the tabs, a message says 'Select one of the links below:'. The main content area is divided into five panels:

- Assignment Setup:** Assignment Shift Codes (0), Assignment Codes (8), Agency Vehicles (4), Agency Equipment (2).
- Activity Tables:** Activity Codes (0), Activity Templates (0), Time Categories (0).
- County & Township Tables:** County Codes (2), Township Codes (1).
- Calls For Service Tables:** Disposition Codes (45), Call Type Codes (437), Call Received Codes (15).
- Other Tables:** Evidence / Held Property Locations (5), Evidence / Held Property Destinations (7), Reporting Areas (2), Towing Companies (23), Judges (16), Court Locations (3), Offense Codes (1), Case Officer Groups (3), Screening Questions (1), Vehicle Location Codes (3), Narrative Templates (0), Case Routing (1), Search Options (1), Maint Values (1), Case Supervisors (1), API Keys (1), Lost & Found Locations (1), Configure Livescan (1), Configure Criminal Complaint Submission (1), Agency Rich Media Storage (1), Notification User Groups (1).

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

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

**Assignment Setup** Panel – "Assignment Set up" below.

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

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

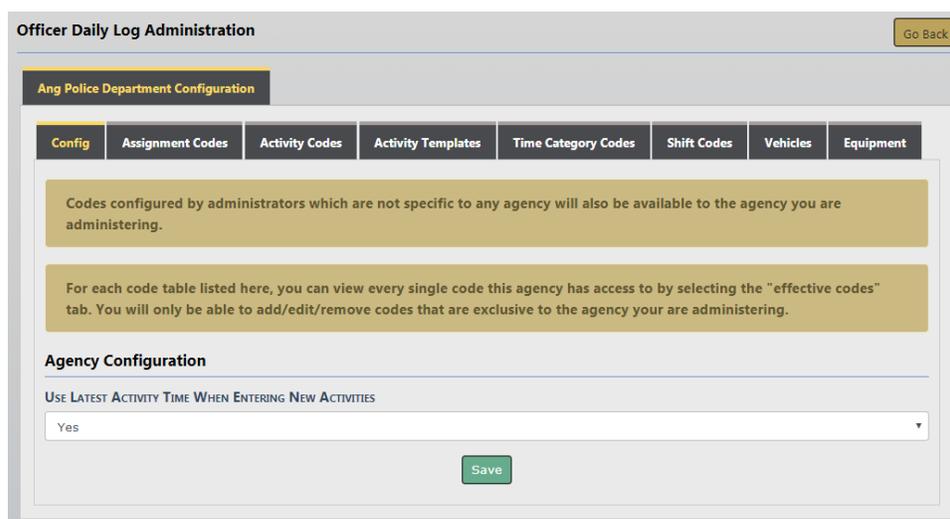
**County and Township Tables** Panel – "County and Township Tables" on page 48.

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

### Assignment Set up

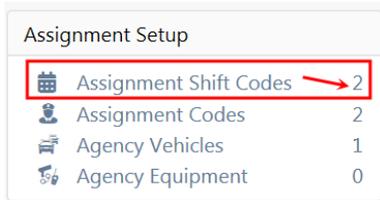
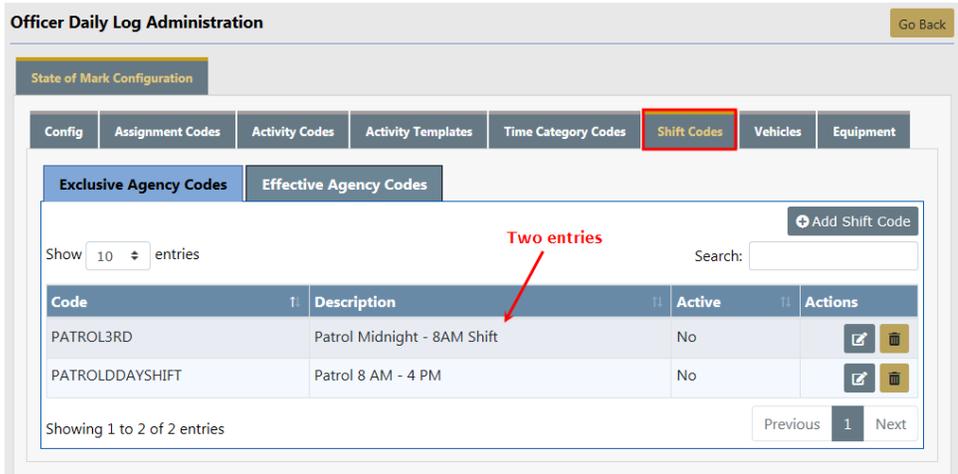
The **Assignment Setup** panel contains four links to the *Officer Daily Log Administration* page which contain several tabs of information. Each link in the **Assignment Setup** panel display a total record count of information that exists in particular tabs of the *Officer Daily Log Administration*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

Assignment Setup		
	Assignment Shift Codes	2
	Assignment Codes	2
	Agency Vehicles	1
	Agency Equipment	0



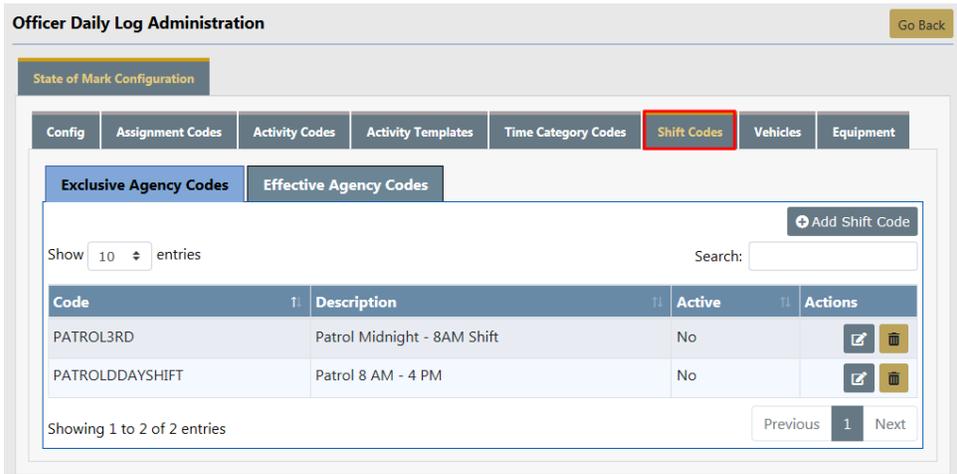
The screenshot shows the "Officer Daily Log Administration" interface for "Ang Police Department Configuration". It features a "Go Back" button in the top right. Below the title is a navigation bar with tabs: "Config", "Assignment Codes", "Activity Codes", "Activity Templates", "Time Category Codes", "Shift Codes", "Vehicles", and "Equipment". The "Config" tab is active. The main content area contains two informational boxes: the first states that codes configured by administrators are also available to the agency; the second explains that users can view codes by selecting the "effective codes" tab and only add/edit/remove codes exclusive to the agency. Below this is the "Agency Configuration" section with a dropdown menu for "USE LATEST ACTIVITY TIME WHEN ENTERING NEW ACTIVITIES" set to "Yes" and a "Save" button.

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

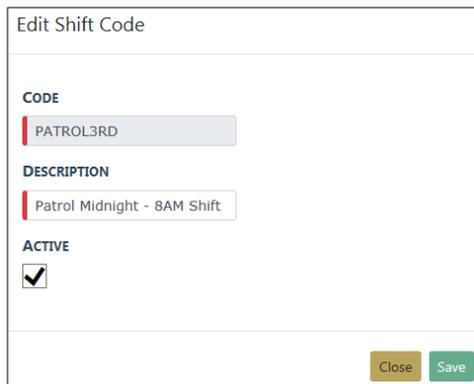


### Assignment Shift Codes

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



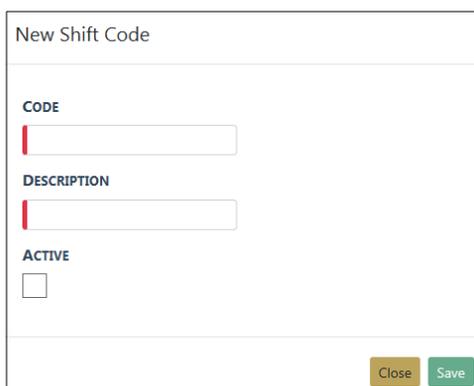
- Click in the **Actions** column to open the *Edit Shift Code* window.



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

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

- Click the  Add Shift Code button to open the *Add Assignment Shift Code* window to add an assignment shift code.



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

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

## Assignment Codes

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

The screenshot shows the 'Officer Daily Log Administration' interface. The 'Assignment Codes' tab is selected and highlighted in red. Below the tabs, there are sections for 'Exclusive Agency Codes' and 'Effective Agency Codes'. A table lists assignment codes with columns for Code, Description, Category, Module, Minimum Staffing, Active status, and Actions. The 'Add Assignment Code' button is highlighted with a red arrow.

Assignment Code	Description	Category	Module	Minimum Staffing	Active	Actions
FOOT_TRAIN	Foot Patrol			No	Yes	
TRAFFIC_TRAIN	ATLN Training	Training	O	No	Yes	

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

The 'Edit Assignment Code' window displays the following fields:

- CODE:** FOOT\_TRAIN
- DESCRIPTION:** Foot Patrol
- ACTIVE:**
- MINIMUM STAFFING:**
- MODULE:**  OFFICER DAILY LOG  SCHEDULING
- CATEGORY:** Training

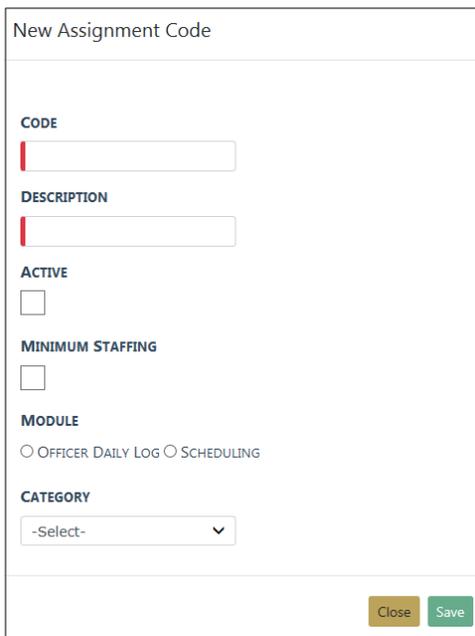
Buttons for 'Close' and 'Save' are located at the bottom right.

- Change field content as needed.

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

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

- Click the  Add Assignment Code button to open the *Add Assignment Code* window to add an assignment code.



New Assignment Code

**CODE**

**DESCRIPTION**

**ACTIVE**

**MINIMUM STAFFING**

**MODULE**  
 OFFICER DAILY LOG  SCHEDULING

**CATEGORY**  
-Select- ▼

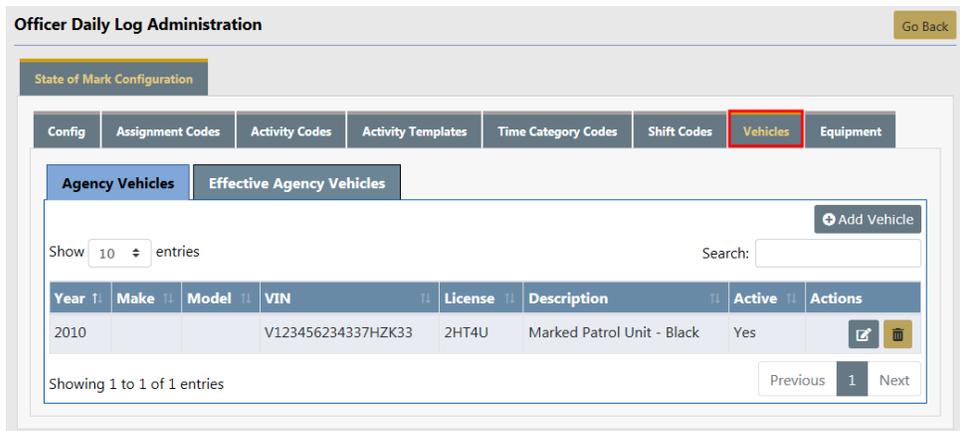
Close Save

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

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

### Agency Vehicles

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



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

The 'Update Agency Vehicle' window is a form with the following fields and controls:

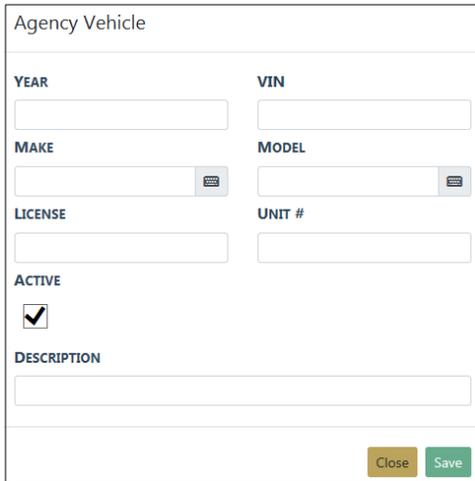
- YEAR:** Text input field containing '2010'.
- VIN:** Text input field containing 'V123456234337HZK33'.
- MAKE:** Text input field with a dropdown arrow.
- MODEL:** Text input field with a dropdown arrow.
- LICENSE:** Text input field containing '2HT4U'.
- UNIT #:** Text input field.
- ACTIVE:** A checked checkbox.
- DESCRIPTION:** Text input field containing 'Marked Patrol Unit - Black'.
- At the bottom right, there are two buttons: 'Close' (yellow) and 'Save' (green).

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

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

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

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



Agency Vehicle

YEAR  VIN

MAKE  MODEL

LICENSE  UNIT #

ACTIVE

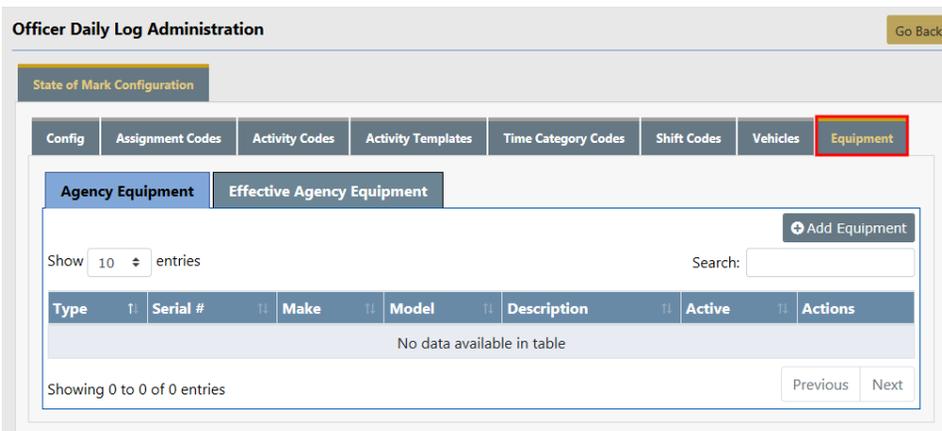
DESCRIPTION

Close Save

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

### Agency Equipment

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



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

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

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

- Click the  Add Equipment button to open the *Add Agency Equipment* window to add equipment.

The 'Agency Equipment' form contains the following fields:

- TYPE**: A dropdown menu with '-Select-' selected.
- SERIAL NUMBER**: A text input field.
- MAKE**: A text input field with a dropdown arrow.
- MODEL**: A text input field with a dropdown arrow.
- ACTIVE**: A checkbox that is checked.
- DESCRIPTION**: A text input field.

At the bottom right of the form are 'Close' and 'Save' buttons.

- Complete fields.

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

## Activity Tables

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

### Activity Codes

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

The screenshot shows the 'Officer Daily Log Administration' page. The 'Activity Codes' tab is selected and highlighted with a red box. Below the tabs, there are sections for 'Exclusive Agency Codes' and 'Effective Agency Codes'. A table displays the following data:

Activity Code	Description	Active	Actions
ANIMAL	Animal Complaint	Yes	 
PARKING	Parking Complaint	Yes	 

At the bottom of the table, there are navigation controls: 'Showing 1 to 2 of 2 entries', 'Previous', '1', and 'Next'. An 'Add Activity Code' button is also visible in the top right of the table area.

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

The 'Edit Activity Code' window shows the following fields:

- CODE**: ANIMAL
- DESCRIPTION**: Animal Complaint
- ACTIVE**:

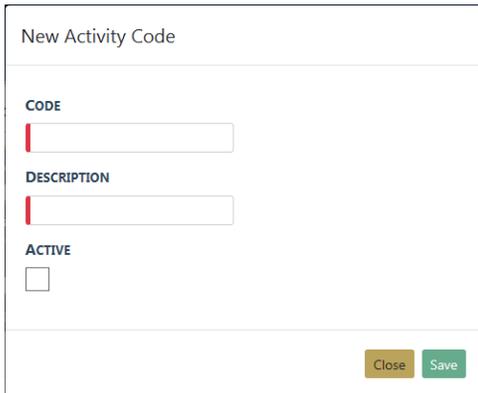
At the bottom right, there are 'Close' and 'Save' buttons.

- Change field content as needed.

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

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

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



The screenshot shows a 'New Activity Code' dialog box. It has a title bar with the text 'New Activity Code'. Below the title bar, there are three input fields: 'CODE', 'DESCRIPTION', and 'ACTIVE'. The 'ACTIVE' field is a checkbox. At the bottom right of the dialog box, there are two buttons: 'Close' (yellow) and 'Save' (green).

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

### **Activity Templates**

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

**Officer Daily Log Administration** Go Back

State of Mark Configuration

Config | Assignment Codes | Activity Codes | **Activity Templates** | Time Category Codes | Shift Codes | Vehicles | Equipment

Exclusive Agency Codes | Effective Agency Codes

Show  entries Add Activity Template

Search:

Activity Code	Description	Active	Activities	Actions
10	Downtown Checks	Yes		  

Showing 1 to 1 of 1 entries Previous **1** Next

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

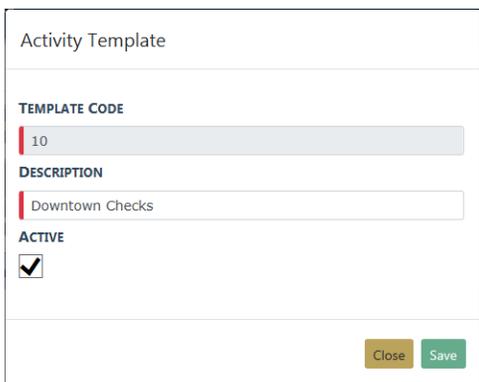
Template Activity

**TEMPLATE CODE**

**ACTIVITY**

**COUNT**

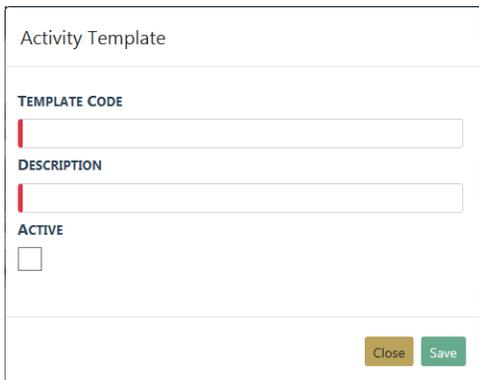
- Click  in the **Activity Code** field to open a selection list of activity codes.
  - Select the appropriate activity code.
  - Complete the **Count** field. A number goes here is for a template for a recurring activity that occurs at the agency, for example, for downtown building checks, the number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



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

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

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



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

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

## Time Categories

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

Officer Daily Log Administration Go Back

State of Mark Configuration

Config Assignment Codes Activity Codes Activity Templates **Time Category Codes** Shift Codes Vehicles Equipment

Exclusive Agency Codes Effective Agency Codes

Show 10 entries Add Time Category Code

Search:

Code	Description	Active	Actions
GAS	Gas Vehicle	Yes	 

Showing 1 to 1 of 1 entries Previous 1 Next

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

Edit Time Category Code

**CODE**

**DESCRIPTION**

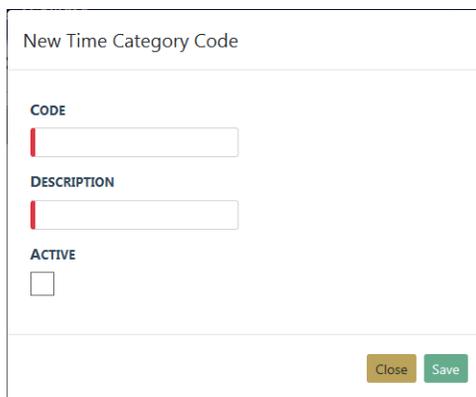
**ACTIVE**

- Change field content as needed.

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

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

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



New Time Category Code

CODE

DESCRIPTION

ACTIVE

Close Save

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

## Calls for Service Tables

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

### Disposition Codes

The Disposition Codes link opens the *Call Disposition Codes* page.

Disposition Code	Description	Event Type	Actions
4	Noise	Police	
10	Animal Abuse	Police	

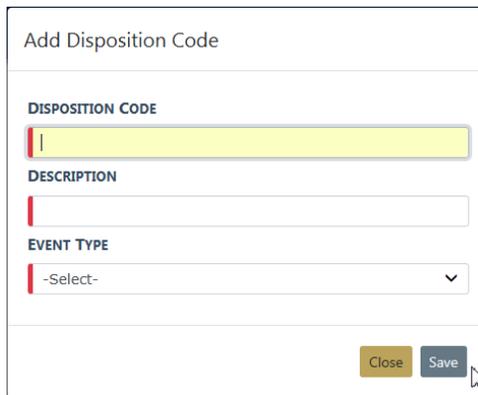
- Click in the **Actions** column to open the *Edit Call Disposition Code* window as shown.

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

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

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

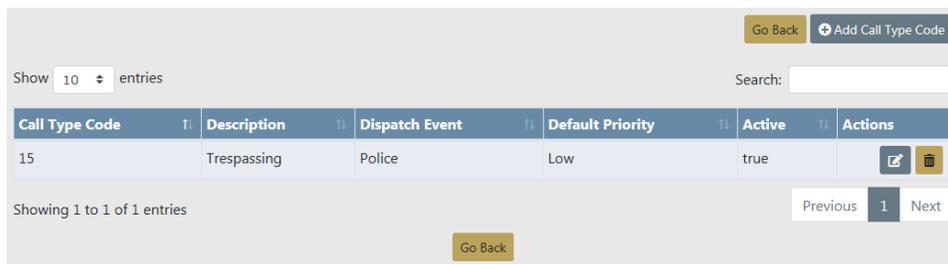
- Click the Add Disposition Code button to open the *Add Call Disposition Code* window to add a call disposition code.



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

### Call Type Codes

The Call Type Codes link opens the *Call Type Codes* page.



Call Type Code	Description	Dispatch Event	Default Priority	Active	Actions
15	Trespassing	Police	Low	true	 

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

Edit Call Type Code

CALL TYPE CODE  
15

DESCRIPTION  
Trespassing

EVENT TYPE  
Police

DEFAULT PRIORITY  
Low

ACTIVE

Close Save

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

Add Call Type Code

CALL TYPE CODE  
|

DESCRIPTION  
|

EVENT TYPE  
-Select-

DEFAULT PRIORITY  
Low

ACTIVE

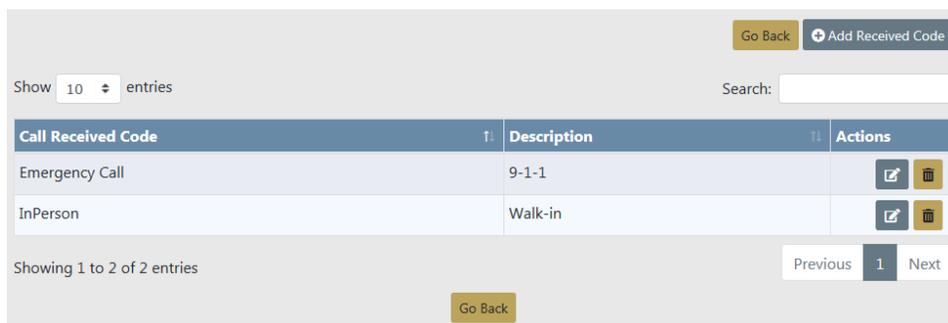
Close Save

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

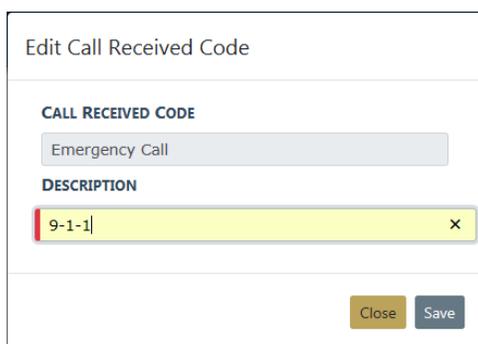
- Select the appropriate **Event Type** from the drop down list.
  - Select the appropriate **Default Priority** from the drop down list.
  - Check the **Active** box to activate the code. (If a code is active, *true* displays in the **Active** column on the *Call Type Codes* page, if not, *false* displays.)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

**Call Received Codes**

The Call Received Codes link opens the *Call Received Codes* page.



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



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

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

Add Call Received Code

---

**CALL RECEIVED CODE**

**DESCRIPTION**

Close
Save

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

## County and Township Tables

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

### County Codes

The County Codes link opens the *County Codes* page.

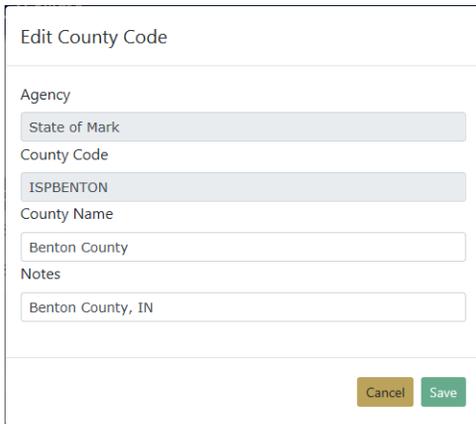
Show  entries
Go Back Add County Code

Search:

Code	Description	Notes	Agency	Actions
ISPBENTON	Benton County	Benton County, IN	State of Mark	 
ISPBOONE	Boone County	Boone County, IN	State of Mark	 

Showing 1 to 2 of 2 entries
Previous 1 Next

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



Edit County Code

Agency  
State of Mark

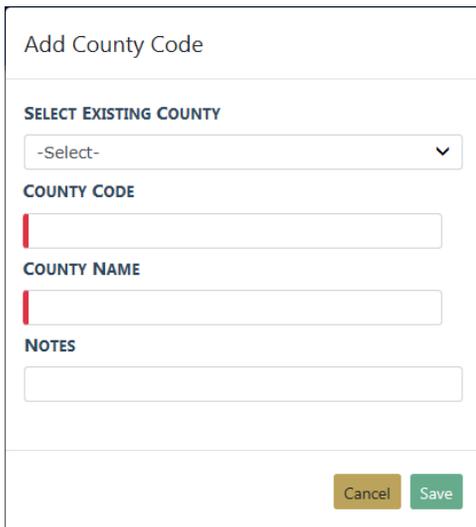
County Code  
ISPBENTON

County Name  
Benton County

Notes  
Benton County, IN

Cancel Save

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



Add County Code

SELECT EXISTING COUNTY  
-Select- ▼

COUNTY CODE

COUNTY NAME

NOTES

Cancel Save

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

- Click **Save** to add the county code and close the window; click **Cancel** to cancel and close the window.
- Click **Go Back** to close the *County Codes* page and return to the *Agency Settings* page.

## Township Codes

The Township Codes link opens the Township Codes page.

Code	Description	Notes	County Code	County Desc	Actions
ISPBENTON	Benton Township	Benton Township, IN	ISPBENTON	Benton County	
ISPBOONE	Boone	Boone Township, IN	ISPBOONE	Boone County	

Showing 1 to 2 of 2 entries

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

**Edit Township**

**COUNTY**  
Benton County

**TOWNSHIP CODE**  
ISPALLEN

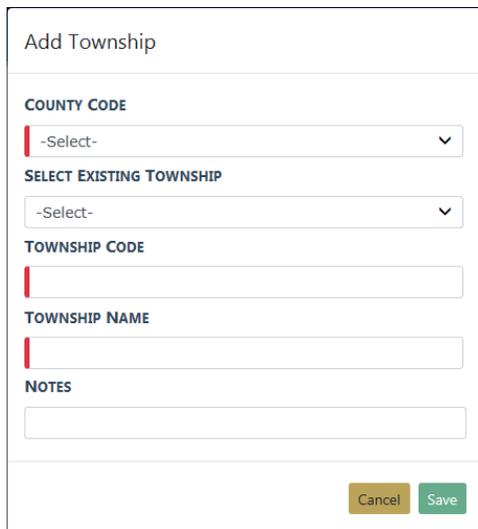
**TOWNSHIP NAME**  
Allen Township

**NOTES**  
Benton Township, IN

Cancel Save

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

- Click the [Add Township Code](#) button to open the **Add Township Code** window to add a township code.



The screenshot shows a window titled "Add Township". It contains the following fields:

- COUNTY CODE**: A drop-down menu with "-Select-" selected.
- SELECT EXISTING TOWNSHIP**: A drop-down menu with "-Select-" selected.
- TOWNSHIP CODE**: A text input field.
- TOWNSHIP NAME**: A text input field.
- NOTES**: A text area.

At the bottom right of the window are two buttons: "Cancel" (yellow) and "Save" (green).

- **Select County Code** from the drop-down selection list.
  - **Select Existing Township** from the drop-down selection list.
  - Or enter new
  - **Township Code** and **Township Name** fields.
  - Enter notes in the **Notes** field, if needed.
  - Click **Save** to add the township code and close the window; click **Cancel** to cancel and close the window.
- Click **Go Back** to close the *Township Codes* page and return to the *Agency Settings* page.

## Other Tables

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

### Evidence / Held Property Locations

The [Evidence / Held Property Locations](#) link opens the *Evidence - Held Property Locations* page.

Go Back Print Location Barcodes Add Evidence / Held Property Location

Show 10 entries Search:

Code	Description	Property Type	Locker	Officer Access	Active	Actions
N/A	N/A		N	Y	Y	 
O_IMPOUND	Impound		N	Y	Y	 
O_LARGE	Large Item Storage		N	Y	Y	 
O_OTHER	Other		N	Y	Y	 
TRANS_UNKNWN	Transported - Unknown Location		Y	Y	Y	 

Showing 1 to 5 of 5 entries Previous 1 Next

Go Back

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

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

Go Back

CODE: O\_LARGE AGENCY: Indiana State Police

DESCRIPTION: Large Item Storage

LOCKER:  OFFICER ACCESS:

STATUS: Active PROPERTY TYPE: Evidence

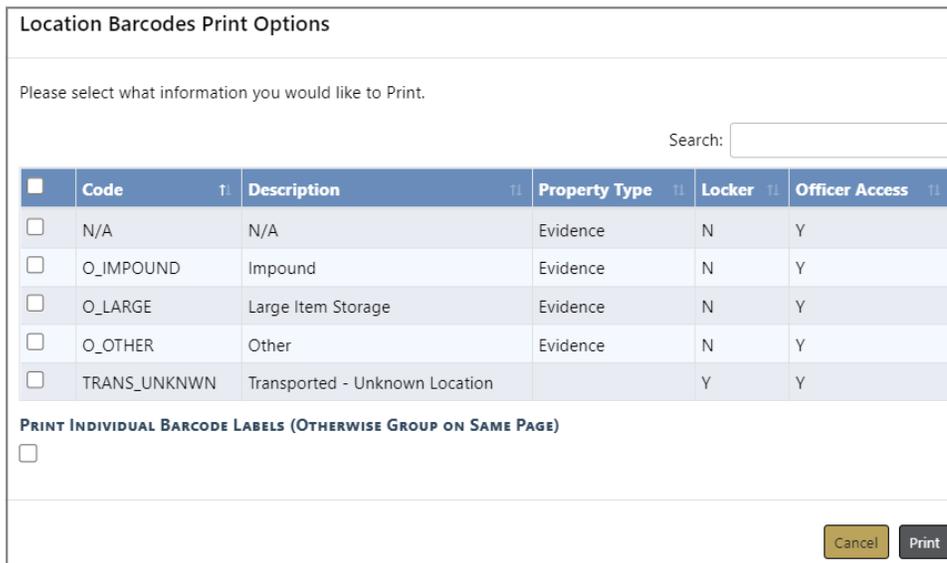
Go Back Save

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

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



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



<input type="checkbox"/>	Code	Description	Property Type	Locker	Officer Access
<input type="checkbox"/>	N/A	N/A	Evidence	N	Y
<input type="checkbox"/>	O_IMPOUND	Impound	Evidence	N	Y
<input type="checkbox"/>	O_LARGE	Large Item Storage	Evidence	N	Y
<input type="checkbox"/>	O_OTHER	Other	Evidence	N	Y
<input type="checkbox"/>	TRANS_UNKNWN	Transported - Unknown Location		Y	Y

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

**Evidence / Held Property Destinations**

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

Code	Description	Active	Actions
ATTR	Defense Attorney	Y	[Edit] [Delete]
CRT	Court	Y	[Edit] [Delete]
LIMS_M	Mailed to LIMS	Y	[Edit] [Delete]
OFF	Officer	Y	[Edit] [Delete]
PROS	Prosecutor	Y	[Edit] [Delete]
T_LIMS	Submitted to LIMS	Y	[Edit] [Delete]
TOOFF	TO Officer	Y	[Edit] [Delete]

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

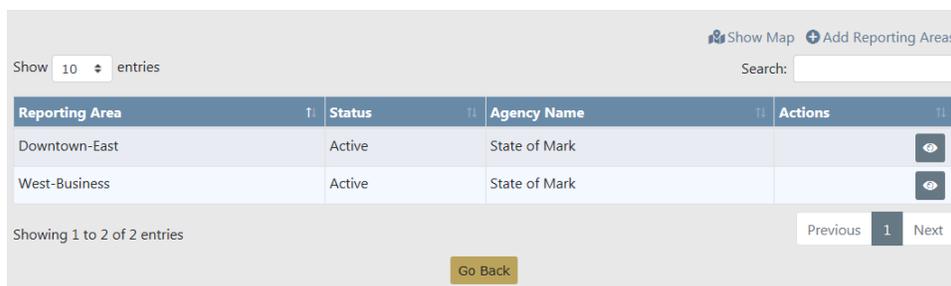
Code	Description	Active	Actions
ATTR	Defense Attorney	Y	[Edit] [Delete]
CRT	Court	Y	[Edit] [Delete]
LIMS_M	Mailed to LIMS	Y	[Edit] [Delete]
OFF	Officer	Y	[Edit] [Delete]
PROS	Prosecutor	Y	[Edit] [Delete]
T_LIMS	Submitted to LIMS	Y	[Edit] [Delete]
TOOFF	TO Officer	Y	[Edit] [Delete]

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

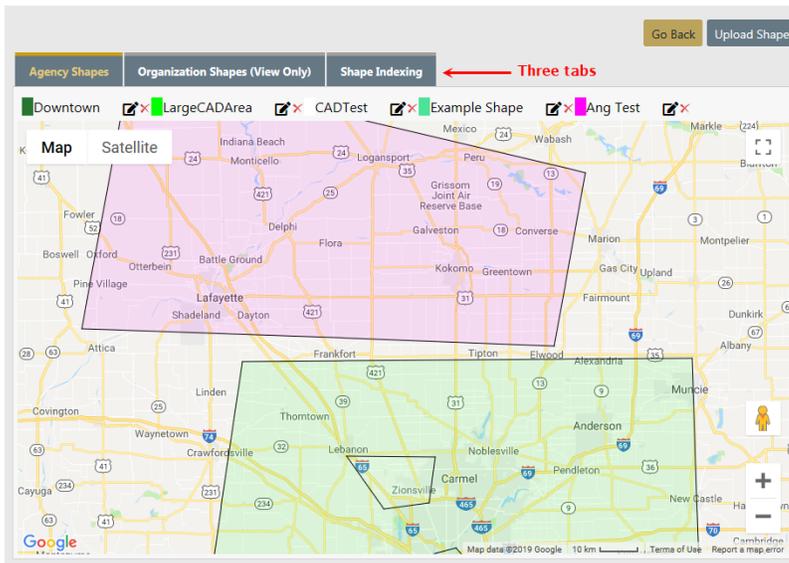
- Click  in the **Actions** column to delete the record listed in the same line. The message, "Are you sure you want to delete?", displays. Click **Yes** to confirm deletion or click **No** to keep the record.
- To add another evidence destination, use the three fields near the bottom of the page as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

**Reporting Areas**

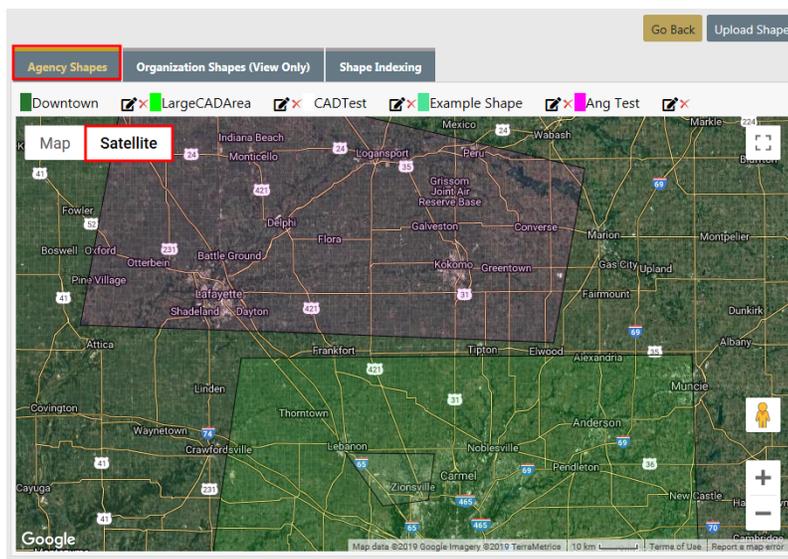
The Reporting Areas link opens the *Reporting Areas* page.



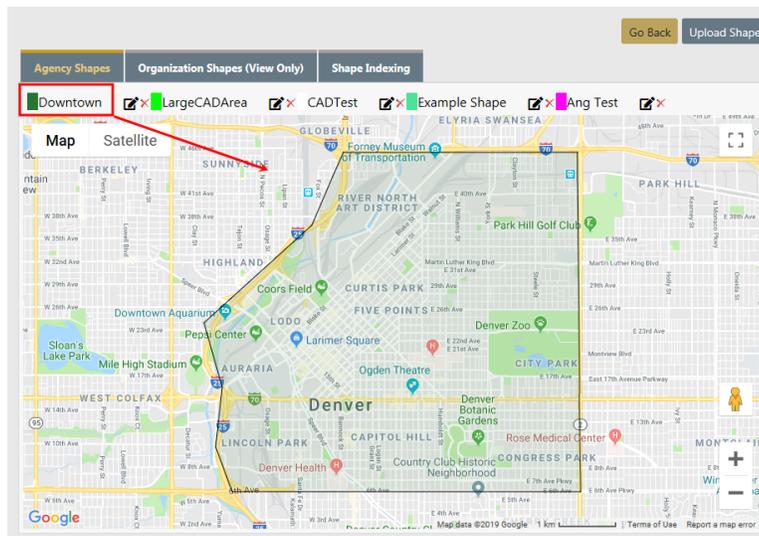
- Click the Show Map link to open the *Mapping Shapes* map as shown in the following example.



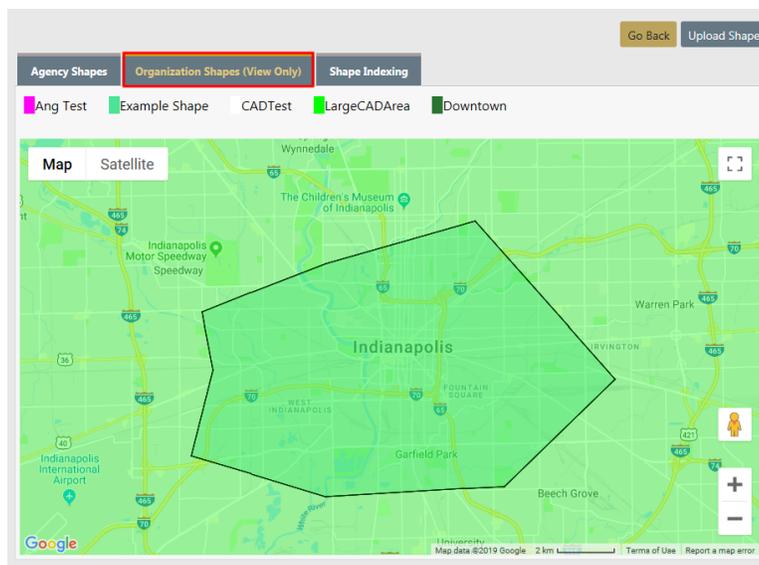
- Click **Satellite** in the upper left corner to change the display as shown in the following example.



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



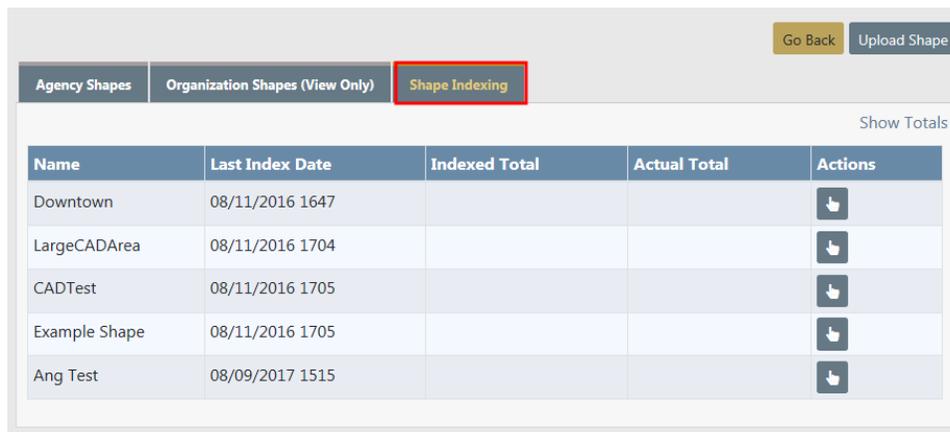
- Click on the **Organization Shapes (View Only)** tab to view for the organization only.



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

FILE	SHAPE NAME
<input type="text"/> Browse...	<input type="text"/>
SHAPE TYPE	COLOR
Other	<input type="text"/>
<input type="button" value="Go Back"/> <input type="button" value="Upload"/>	

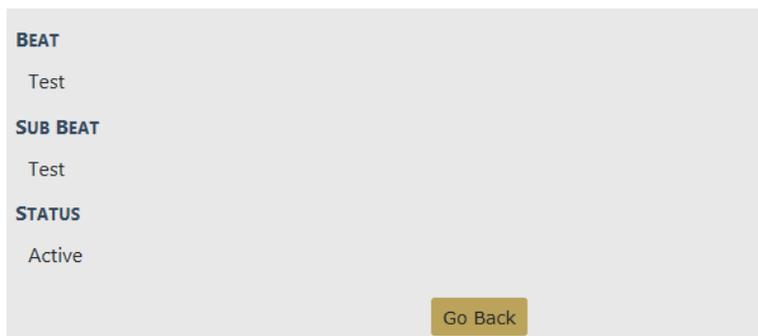
- Click on the **Shape Indexing** tab to index the shapes.



Name	Last Index Date	Indexed Total	Actual Total	Actions
Downtown	08/11/2016 1647			
LargeCADArea	08/11/2016 1704			
CADTest	08/11/2016 1705			
Example Shape	08/11/2016 1705			
Ang Test	08/09/2017 1515			

Click on the select icon  to index a shape.

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



<b>BEAT</b>
Test
<b>SUB BEAT</b>
Test
<b>STATUS</b>
Active

[Go Back](#)

- This is a view only page.
- Click **Go Back** to close the *View Reporting Areas* page and return to the *Reporting Areas* page.
- Click the  [Add Reporting Area](#) link to open the *Add Reporting Areas* page to add another reporting area record.

**BEAT**

**SUB BEAT**

**STATUS**  
-Select- ▼

[Go Back](#) [Save](#)

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

### Towing Companies

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

Go Back Add Towing Company

Show 10 entries Search:

Name	Street	Phone	Email	County	Active	Actions
Aaa Tow	1300 Bush Street	111 333 3333			No	 
AAA TOWING	100 Main	111 222 3333		ANG TEST COUNTY	No	 
ABC 123 Towing	102 Smith Dr.	888 222 2555		Daviness DIST 34	Yes	 
ACME WRECKER	100 Anywhere	777 777 7777		Ripley County	Yes	 
Asdfsa	Asdfadf	581 635 1635			Yes	 
Big John's Towing	2358 East St.	456 158 1651		Red	Yes	 
Big Tow	345 Howard Street, Building G	888 777 7777		Elkhart	Yes	 
Browns	123 Front St	555 555 1234		LaGrange County	Yes	 
Delco Road Towing	123 Delco Road	444 444 4444		Crawford DIST34	Yes	 
DI Towing	1200 Broadway	303 333 2333			Yes	 

Showing 1 to 10 of 23 entries Previous 1 2 3 Next

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

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

## Judges

The Judges link opens the *Judges* page.

Go Back

Add Judge

Show 10 entries Search:

No.	Last Name	First Name	Middle Name	Title	User ID	Active	Actions
7	Stem	Robert		Judge		Y	 
8	Roe	Jan		Judge		Y	 
9	Webber	Fredrick		Judge		Y	 
10	Zan	Debbie		Judge		Y	 
11	Smith	John		JUDGE		Y	 
12	Smith	John		JUDGE		Y	 
14	Bloom	Judy		JUDGE		Y	 
15	Bloom	Judy		JUDGE		Y	 
16	Jerry	Smith		JUDGE		Y	 
17	Judy	Judge		JUDGE		Y	 

Showing 1 to 10 of 16 entries

Previous 1 2 Next

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

Judge

**LAST NAME**

**FIRST NAME**

**MIDDLE NAME**

**TITLE**

**USER ID**

**ACTIVE**

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

Judge

**LAST NAME**

**FIRST NAME**

**MIDDLE NAME**

**TITLE**

**USER ID**

**ACTIVE**

Close
Save

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

**Court Locations**

The Court Locations link opens the *Court Locations* page.

ID	Name	Address	Status	Court	Receiving Agency	Sort Order	Actions
58	Court #1 -	7865 Westbrook Street San Francisco California 94115-	Active	true	true	2	
72	Court #2 -	65 Eastbrook Street Carpinteria California 93013-	Active	true	false	4	
88	Court #3 -	1 Main Indianapolis Indiana 12345-	Active	false	false	3	

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

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

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

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

**Offense Codes**

The Offense Codes link opens the *Local Offense Codes* page.

Local Offense	Description	State Offense	NIBRS Code	Status	Actions
0001	Ordinance Violation - Disorderly Conduct			Inactive	
1111555	Test			Inactive	
12333	Local Offense - Failure to Register			Active	
6.2.106.A :M: 1350	Homicide Criminally Negligent Manner	35-42-1-1 M01	09A	Inactive	
ANG TEST	Ang Test			Active	
IA-32644	Testing			Inactive	
REGION 2 LOCAL OFFENSE TEST	Region 2 Local Offense Test			Active	
TEST LOCAL OFFENSE	Test Offense Description	10-14-3-29.5	90Z	Active	
TESTING123	Testing123	9-21-8-52A	90Z	Inactive	

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

The screenshot shows a form for editing a local offense code. At the top right is a 'Go Back' button. The form is divided into several sections:
 

- OFFENSE**: Contains the value '0001'.
- REQUIRE APPROVAL**: A checkbox that is currently unchecked.
- AGENCY**: A dropdown menu showing 'County of Mark'.
- DESCRIPTION**: A text field containing 'Ordinance Violation - Disorderly Conduct'.
- STATE OFFENSE**: A dropdown menu with '-Select-' selected.
- NIBRS CODE**: A dropdown menu with '-Select-' selected.
- STATUS**: A dropdown menu with 'Active' selected.
- ARREST CODES**: An empty field.

 At the bottom of the form are two buttons: 'Go Back' and 'Save'.

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

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

**Case Officer Groups**

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

Name	Officers	Actions
D35 GROUP	Jennifer Hackberry   Brian DeNoyer	[Edit] [Delete]
D42 GROUP 12	Jimmy Buffett   Peter (off) T Avery   Annelyn Afcial   Charles Livingwell	[Edit] [Delete]
GROUP 2	Derek J Livangood   Dana McMillan   Derek J Livangood   Dana M	[Edit] [Delete]

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

Officer Group

GROUP NAME  
D35 GROUP

OFFICERS

Search... [Select All] [Select None]

Employee Evidence2 #654321	Jennifer Hackberry #4
Christian (osuper) Fred Gordmanson #200	Brian DeNoyer #702
Christian (osuper) Gordmanson2 #90	
Crispy Pastry #94672	
Officer Sunsons #68249	
ReallyReallyReally VeryVeryVeryVery	

[Cancel] [Update]

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

The screenshot shows a web form titled "Officer Group". At the top is a "GROUP NAME" input field. Below it is an "OFFICERS" section containing a search bar with the text "Search...", a "Select All" button, and a "Select None" button. A list of officer names is displayed below the search bar, including "Employee Evidence2 #654321", "Christian (osuper) Fred Gordmanson #200", "Christian (osuper) Gordmanson2 #90", "Crispy Pastry #94672", "Officer Sunsonsens #68249", and "ReallyReallyReally VeryVeryVeryVeryVery". At the bottom right of the form are "Cancel" and "Save" buttons.

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

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

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

- Click the **Save** button.

**Screening Questions**

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

The Screening Questions link opens the *Screening Questions* page that lists the question sets.

Name	Module	Active	Special Category	Actions
Juvenile Protection:	Field Arrests	No	Juvenile Questions	
Screening Questions	Field Arrests	No		
Drugs Screening	Field Arrests	Yes		
test	Field Arrests	No	Juvenile Questions	

- Click the [Add Question Type](#) link on the top right of the window to open the *Screening Questions* page to add a question set.

NAME: Juvenile Protection:  
MODULE: Field Arrests  
ACTIVE:   
SPECIAL CATEGORY: -Select-  
Buttons: Save, Go Back

Question	Active	Actions
----------	--------	---------

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

NAME:   
YES / NO QUESTION:   
Buttons: Save, Go Back

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

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

**If a Yes/No Question**

**If not a Yes/No Question**

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

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

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

**Vehicle Location Codes**

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

Go Back

+ Add Location Code

Show 10 entries

Code	Description	Agency Code	Actions
CLAB	Crime Lab Garage	IPSC	 
STLOT	Storage Lot	IPSC	 
WRCK	Wrecker Company	IPSC	 

Showing 1 to 3 of 3 entries

Previous 1 Next

To add a code, click the  [Add Location Code](#) link to display the *Add Impound Location Code* window.

Location Code

---

**IMPOUND LOCATION CODE**

**DESCRIPTION**

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

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

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

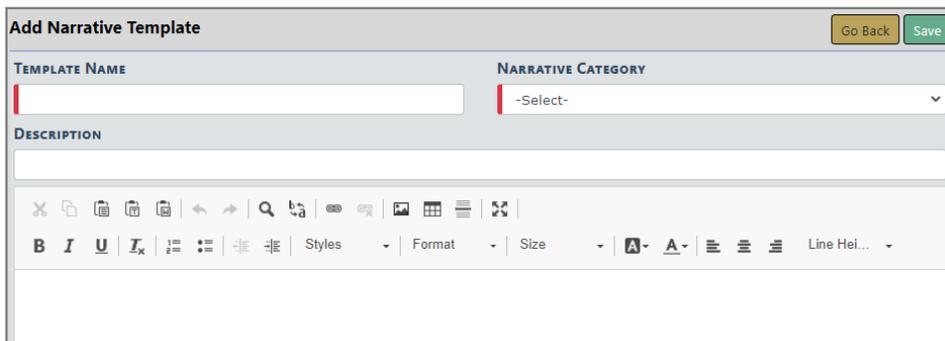
To delete a code click  in the **Actions** column to the far right of the code listing to open the message, *Vehicle Impound Code Deleted Successfully*. Click **Yes** to return to the page where the deleted code is no longer listed.

### Narrative Templates

The [Narrative Templates](#) link opens the *Narrative Templates* page.



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

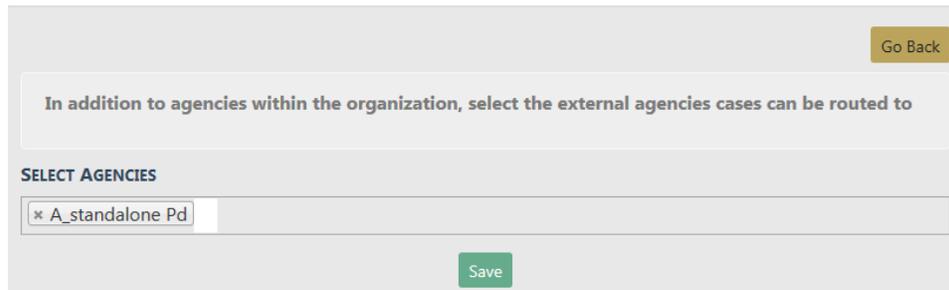


- Complete the fields at the top of the page appropriately.
  - Type the content of the template in the large pane, using the tool bar at the top of the pane to format the text as needed.
  - Click **Save** to save the new template as often as needed.
  - Click **Go Back** to close the *Add Narrative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

## Case Routing

Administrators with appropriate permissions can route cases to external agencies.

The Case Routing link opens the *Agency Case Routing* page.

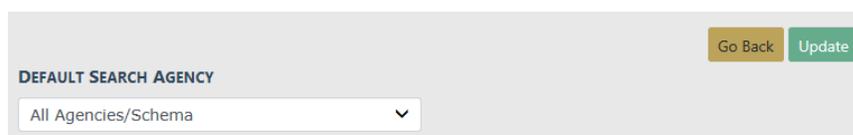


- To *select* an available agency, click in the **Select Agencies** box then select one or more agencies from the list that appears.
  - To *deselect* an agency, click on the X to the left of the agency name to remove it from the **Select Agencies** box.
- Click **Save**. A successful message appears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

## Search Options

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

The Search Options link opens the *Agency Search Options* page.



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

## Maint Values

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

For details, refer to “Maintenance Values” on page 345.

## Notification User Groups

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

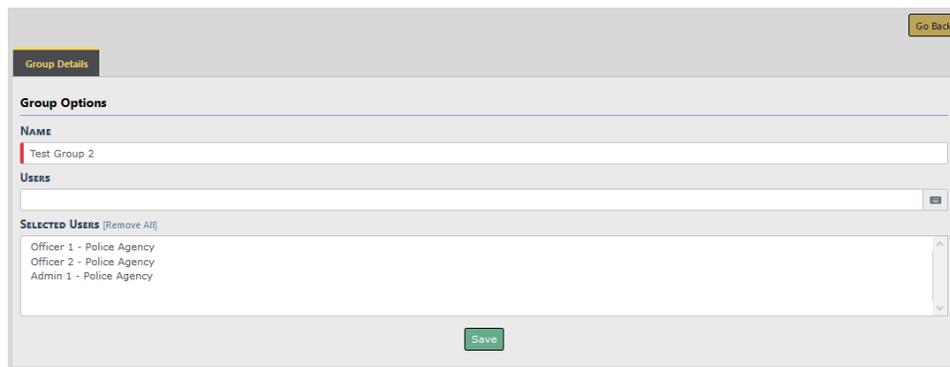
Other Tables		
	Evidence / Held Property Locations	5
	Evidence / Held Property Destinations	7
	Reporting Areas	2
	Towing Companies	23
	Judges	16
	Court Locations	3
	Offense Codes	1
	Case Officer Groups	3
	Screening Questions	
	Vehicle Location Codes	3
	Narrative Templates	0
	Case Routing	1
	Search Options	
	Maint Values	
	Case Supervisors	
	API Keys	
	Lost & Found Locations	1
	Configure Livescan	
	Configure Criminal Complaint Submission	
	Agency Rich Media Storage	
	Notification User Groups	2

User Groups			Go Back	Add Group
Name	Users	Actions		
ISP 1	Sally (osuper) Adams Admin 1 NEW 4 Annelyn Aficial	 		
Test Notification Agency Group	Christine Saur Dana M	 		

Showing 1 to 2 of 2 entries

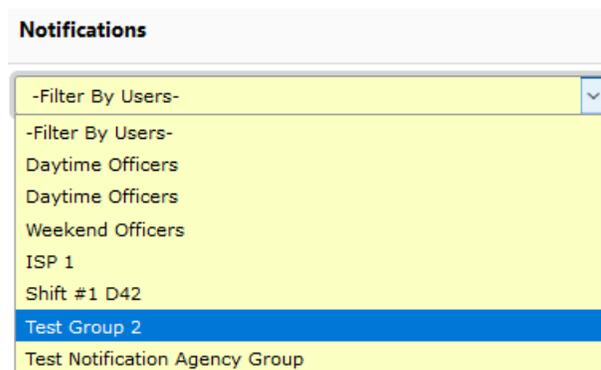
Previous 1 Next

Click the **Add Group** button to add a new group.



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

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



## Add Agency

Use the following procedure to add an agency record.

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

The screenshot shows a web form for managing agency information. It includes fields for internal and display codes, contact information (website, phone, fax), and authentication settings. A table for external authentication is also visible, with columns for Enabled, Type, Host, Port, Shared Secret, Enable Level, and Action.

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

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

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

TO UPLOAD:

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

**Enter data** into the *AgencySetup.xls* Excel spreadsheet and **Save**.

In Online RMS, click **Choose File** and select the *AgencySetup.xls* Excel spreadsheet.

Click **Upload**.

TO MANUALLY ENTER DATA:

Click **Manually Enter Data** to open the Wizard.

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

Click **Finish**.

# Chapter 5. Roles

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

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

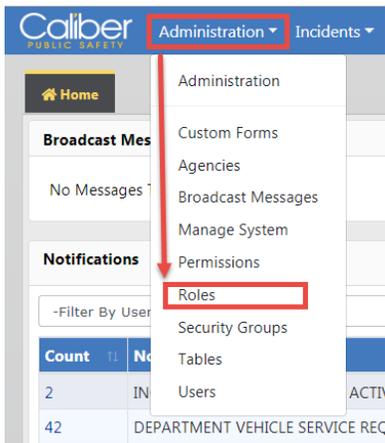
- A user must be assigned at least one role in order to perform tasks within the system.
- A user can be assigned more than one role.
- Two different roles may include one or more of the same permissions, but within a specific agency, each role is unique in its permissions make-up.
- Certain users may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

## Access Roles Module

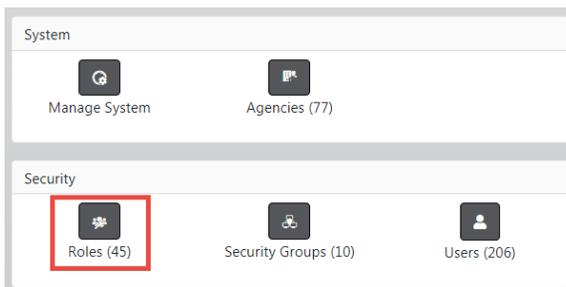
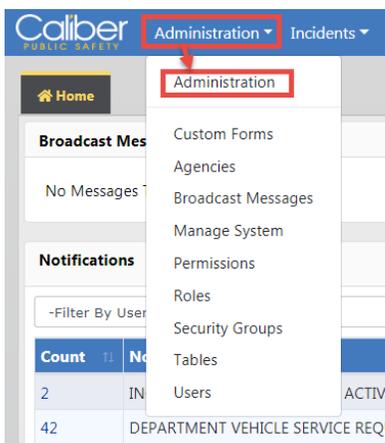
System roles used by an agency can be added and edited via the **Roles** module by certain users with administrative permissions.

From the *Homepage* access the Roles module one of two ways:

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



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



The *Roles* page displays as shown.

Administration / Roles

Go Back Add Role Compare

Show 10 entries Search:

Compare ↑	Role Name	Role Description	Actions
<input type="checkbox"/>	AGENCY_ADMIN	Role for Agency Administrators	
<input type="checkbox"/>	AGENCY_AD_HOC_REPORTING_TOOL	Agency Ad Hoc Reporting Tool	
<input type="checkbox"/>	CAL_ADMIN	Schedule Administrator	
<input type="checkbox"/>	CAL_MANAGER	Calendar Manager	
<input type="checkbox"/>	CASE_SUPERVISOR	CASE_SUPERVISOR	
<input type="checkbox"/>	CFS	Dispatch type role for Calls for Service	  
<input type="checkbox"/>	CID_SUPERVISOR	Role for assigning general Investigative functions to Investigator Supervisor	
<input type="checkbox"/>	CID_USER	Role for assigning general Investigative functions to Investigator	
<input type="checkbox"/>	COMMAND	Command Staff	
<input type="checkbox"/>	COPY_DL TEST	IA-52785	  

Showing 1 to 10 of 45 entries

Previous 1 2 3 4 5 Next

Go Back

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

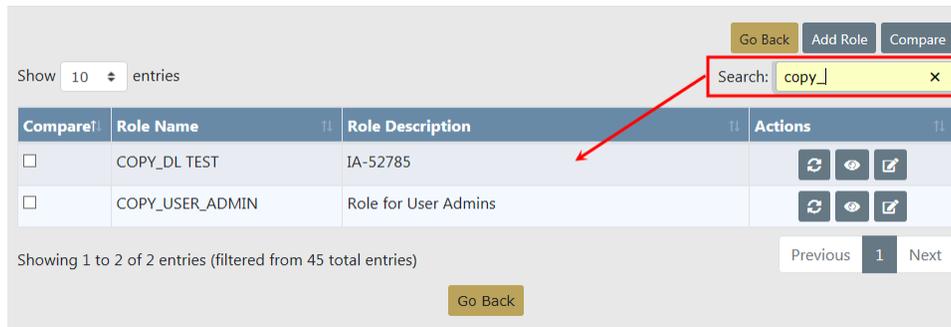
- "Edit Role" below.
- "Add Role" on page 81

## Edit Role

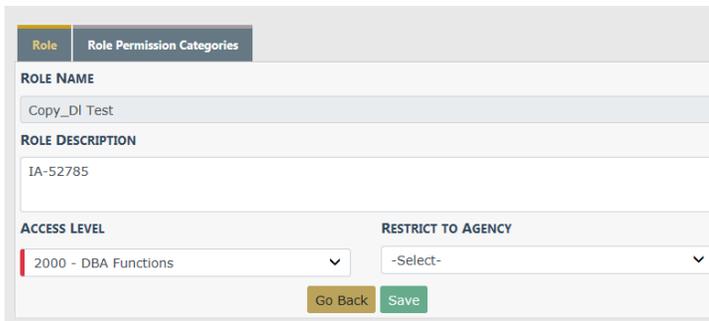
Use the following procedure to edit a role.

**Note:** Never edit Roles that came with the software; make a copy of the Role then edit the copy as needed. For details on how to copy a Role refer to "Copy Role" on page 83.

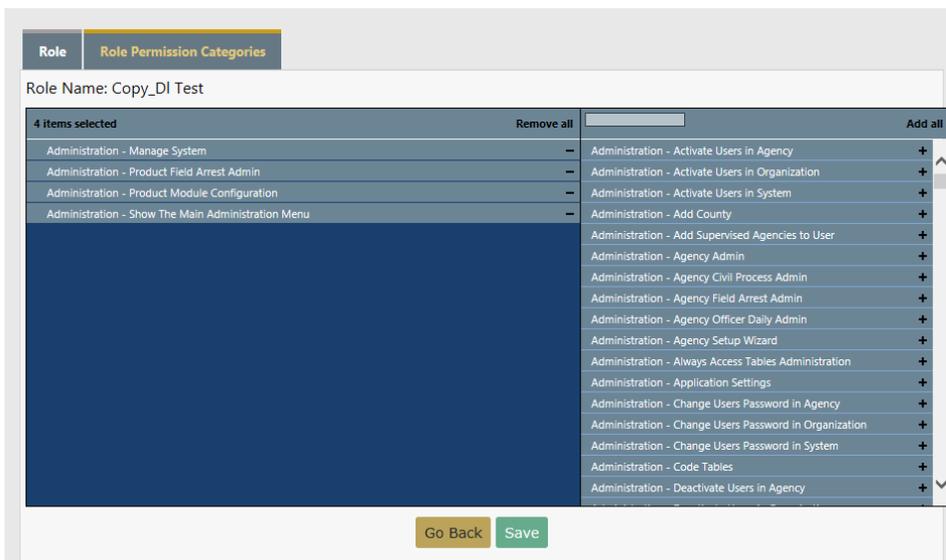
1. From the *Roles* page, locate the record to be changed as follows:
  - Scroll down the list of roles until you locate the one you want to edit. (Only roles with an edit icon  in the **Actions** column can be edited.)
  - Use the **Search** fields to return the record as shown.



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



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

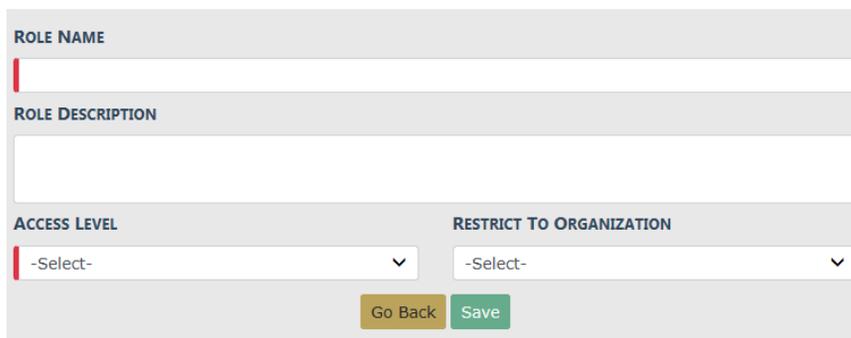


- Remove or add permissions to this role for your agency as follows:
  - In the panel to the left, click **-** (minus sign) to the far right in the same line to remove that permission.
  - In the panel to the right, click **+** (plus sign) to the far right in the same line to add that permission.
  -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

## Add Role

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

- From the *Roles* page, click the Add Role button in the upper right corner to display the *Add Role* page as shown.



ROLE NAME

ROLE DESCRIPTION

ACCESS LEVEL

RESTRICT TO ORGANIZATION

-Select-

-Select-

Go Back Save

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



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

## Copy Role

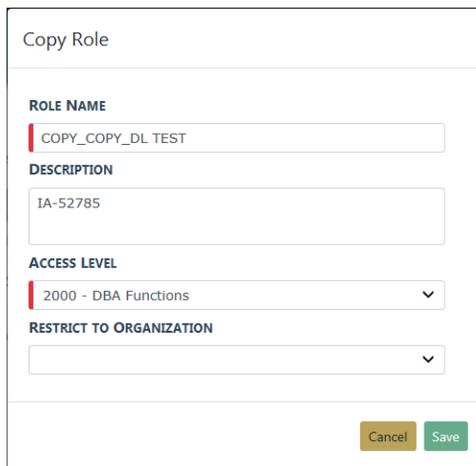
To save time setting up a new role, you have the ability to copy one role to another role if they have similar traits. During the copy process, you can update the new role as needed.

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

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

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

Compare	Role Name	Role Description	Actions
<input type="checkbox"/>	COPY_DL TEST	IA-52785	  



Copy Role

**ROLE NAME**  
COPY\_COPY\_DL TEST

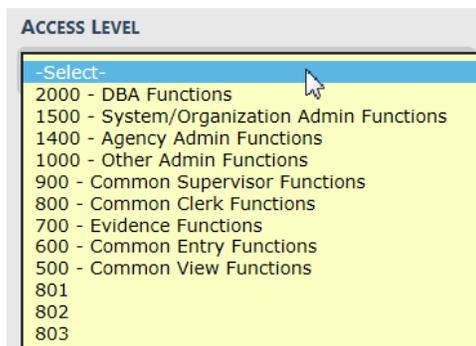
**DESCRIPTION**  
IA-52785

**ACCESS LEVEL**  
2000 - DBA Functions

**RESTRICT TO ORGANIZATION**

Cancel Save

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



**ACCESS LEVEL**

-Select-

2000 - DBA Functions

1500 - System/Organization Admin Functions

1400 - Agency Admin Functions

1000 - Other Admin Functions

900 - Common Supervisor Functions

800 - Common Clerk Functions

700 - Evidence Functions

600 - Common Entry Functions

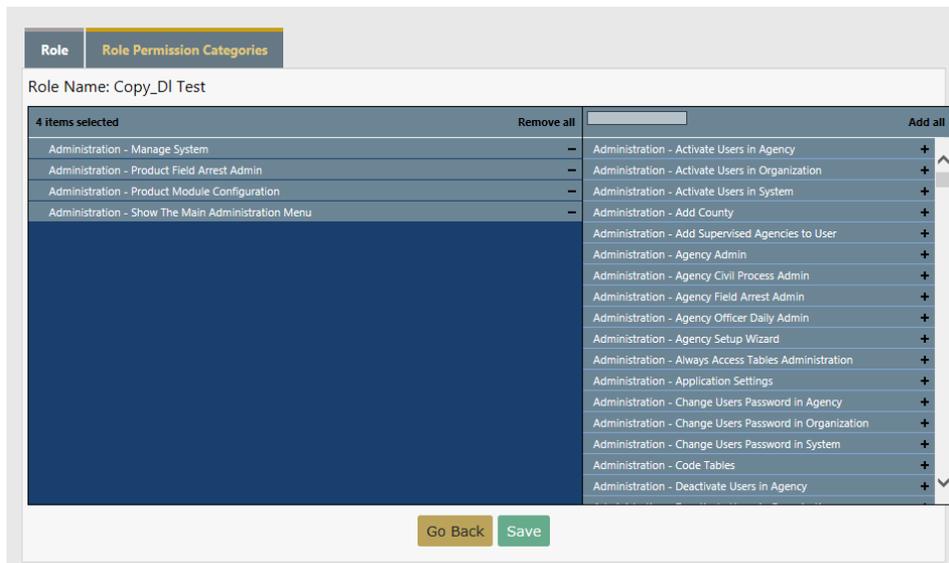
500 - Common View Functions

801

802

803

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



9. Add permissions to this role for your agency as follows:

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

10. Click **Save** at the bottom of the page to save your changes.

11. Review permissions and continue as follows:

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

12. Continue as follows:

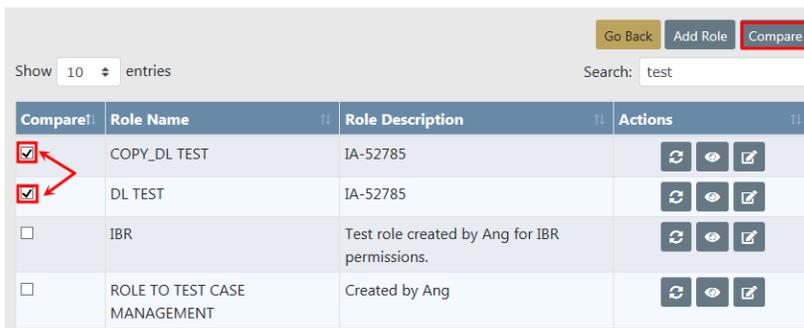
- If needed, make changes and click **Save** to return to the *Roles* page.
- If changes are not needed, click **Go Back** to return to the *Roles* page.

# Compare Role

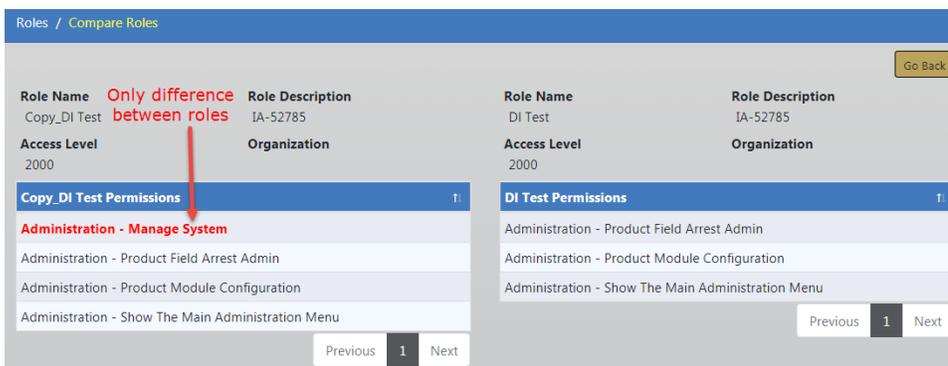
Compare two or more roles to understand permission differences between them, and to identify potential duplicates.

Use the following procedure to compare roles for your agency.

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



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



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

# Chapter 6. Security Groups

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

## Access Security Groups Module

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

From the *Home* page,

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

The *Security Groups* page displays as shown.

The screenshot shows the Security Groups module interface. At the top right, there are buttons for "Go Back" and "Add Security Group". Below these is a search bar with the text "Search:". On the left, there is a "Show 10 entries" dropdown menu. The main content is a table with the following data:

ID	Security Group Name	Agency Description	Actions
1	Admins	District 21, Toll Road - SC	
2	Case & Incident Dist 21 ONLY	District 21, Toll Road - SC	
3	DIC	District 16, Peru - GA	
4	Dist 16 CID users	District 16, Peru - GA	
5	Dist 21 CID Members Only	District 21, Toll Road - SC	
6	District 16 and 21 Patrol	District 21, Toll Road - SC	
7	Internal Affair	District 52, Indianapolis	
8	Multi-Agency Group	District 21, Toll Road - SC	
9	NO AGENCY TEST		
10	Test 42	District 42, Versailles	

At the bottom of the table, there is a "Showing 1 to 10 of 10 entries" label and a pagination control with "Previous", "1", and "Next" buttons. A "Go Back" button is also present at the bottom center.

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

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

## Edit Security Group

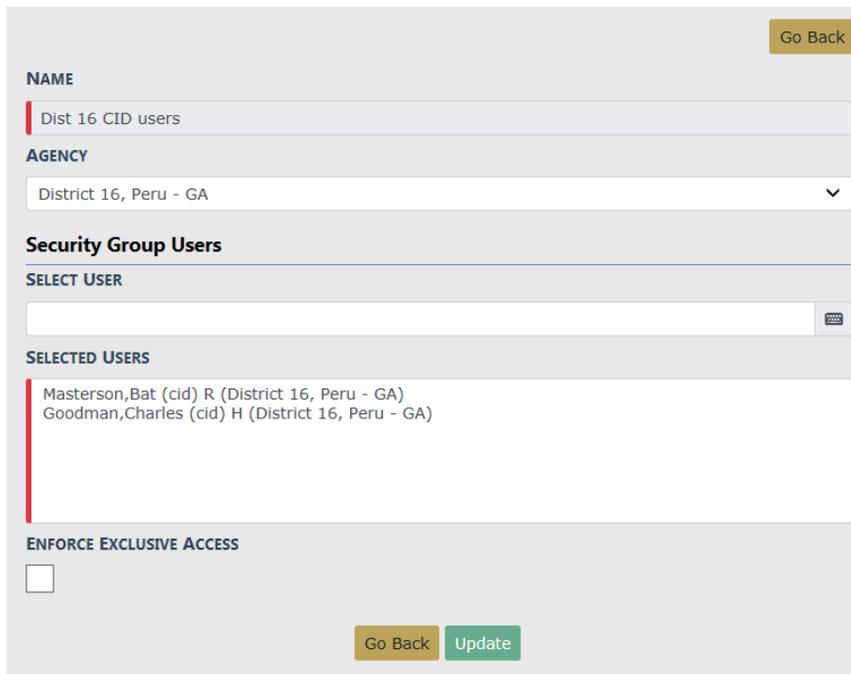
Use the following procedure to edit a security group.

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



ID	Security Group Name	Agency Description	Actions
2	Case & Incident Dist 21 ONLY	District 21, Toll Road - SC	 
4	Dist 16 CID users	District 16, Peru - GA	 
5	Dist 21 CID Members Only	District 21, Toll Road - SC	 

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



**NAME**  
Dist 16 CID users

**AGENCY**  
District 16, Peru - GA

**Security Group Users**

**SELECT USER**

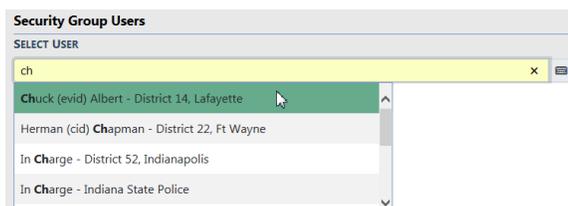
**SELECTED USERS**

Masterson,Bat (cid) R (District 16, Peru - GA)  
Goodman,Charles (cid) H (District 16, Peru - GA)

**ENFORCE EXCLUSIVE ACCESS**

Go Back Update

3. If needed, make changes to the **Agency** field. (The **Name** field cannot be changed.)
4. Change the users listed in the **Selected Users** field as follows:
  - a. To add users, click into the **Select User** field and begin typing the first or last name to display a list of users that match your entered text. Users can be selected from any agency within your schema; they do not have to be part of the agency selected when setting up the security group, nor do they have to be part of your agency (if they are still within your schema). Select one or more users from the list to add it to the **Selected Users** box.



**Security Group Users**

**SELECT USER**

ch

Chuck (evld) Albert - District 14, Lafayette

Herman (cid) Chapman - District 22, Ft Wayne

In Charge - District 52, Indianapolis

In Charge - Indiana State Police

- b. To remove a user from the **Selected Users** box, select the name and **double-click** on the name.
5. Click **Update** to save changes and return to the *Security Groups* page.
6. Click **Go Back** to return to the *Administrative Home* page

## Delete Security Group

Use the following procedure to delete a security group record.

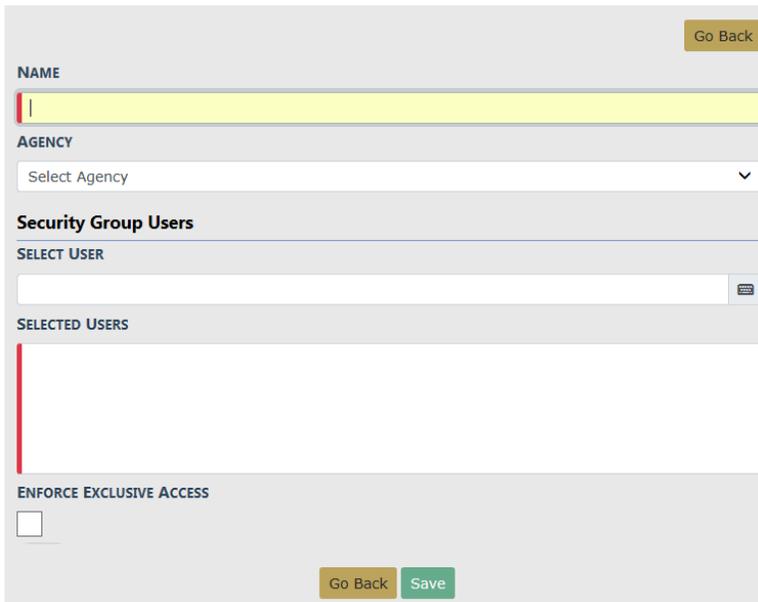
1. On the *Administrative Home* page, click the **Security Groups** icon to display the *Security Groups* page.
2. In the **Action** column, click  in the same row as a security group listing to display the prompt, *Are you sure you want to delete this Work Group?*
3. Click **Yes** to confirm deletion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

The listing no longer appears on the *Security Groups* grid.

## Add Security Group

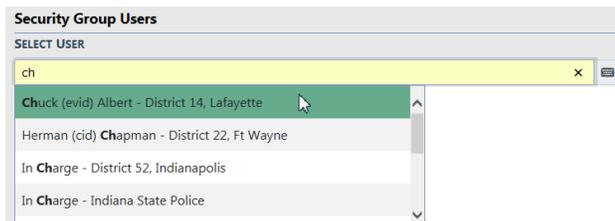
Use the following procedure to add a security group for your agency.

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



2. Type the name you want to use for this group in the **Name** field.
3. Add users to this group as follows:

- a. To add users, click into the **Select User** field and begin typing the first or last name to display a list of users that match your entered text, then select one or more from the list to add it to the **Selected Users** box. The agency to which the user belongs (provided the user is within the same schema) will populate automatically.



- b. To remove a user from the **Selected Users** box, select the name and **double-click** on the name.
4. Check the **Enforce Exclusive Access** box, if applicable.
  5. Click **Save** to save and return to the *Security Groups* page.



# Chapter 7. Manage Users

## Users Overview

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

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

## Manage Users

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

The screenshot displays the 'Manage Users' interface. At the top, there are buttons for 'Go Back', 'Add User', and 'Mass User Entry'. Below these are tabs for 'User Accounts' and 'Log'. A search bar is present with filters for 'Status' (set to 'Active') and 'Subscription Level' (set to '-All-'). A 'Search' button is also visible. The main area contains a table with columns: First, Middle, Last, User Name, Title, Status, Subscription Level, Agency, User Role, Last Login Date, and Actions. Five user entries are listed. Below the table, an 'Actions' menu is shown with icons for Edit, Emulate, Change Password, and Delete, each with a red arrow pointing to it.

First	Middle	Last	User Name	Title	Status	Subscription Level	Agency	User Role	Last Login Date	Actions
Charles		Smith	STATE_OFFICER14	Chief	Active	Full Time	District 42, Versailles	AGENCY_ADMIN AGENCY_AD_HOC_REPORTING_TOOL CFS CREATE_CITATIONS CREATE_PERMITS CREATE_WARRANTS DISPATCH OFFICER OFFICER_SUPERVISOR	06/16/2023 09:55 AM MST	[Edit] [Emulate] [Change Password] [Delete]
Christopher (osuper)	H	Gordmanson	STATE_OSUPER1		Active	Full Time	District 21, Toll Road - SC	AGENCY_AD_HOC_REPORTING_TOOL CAL_ADMIN CAL_MANAGER CFS CREATE_CITATIONS CREATE_PERMITS DISPATCH_VIEW_ONLY EVIDENCE_CUSTODIAN LEA_RECORDS_MGMT OFFICER_SUPERVISOR	06/26/2023 06:53 AM MST	[Edit] [Emulate] [Change Password] [Delete]
D21		User	D21_USER		Active	Full Time	District 21, Toll Road - SC	CID_SUPERVISOR COMMAND OFFICER_SUPERVISOR	07/20/2023 04:26 PM MST	[Edit] [Emulate] [Change Password] [Delete]
Dana	External	McMillan	DMM_EXT		Active	Full Time	District 42, Versailles	AGENCY_ADMIN OFFICER ORGANIZATION_ADMIN	06/15/2023 03:51 PM MST	[Edit] [Emulate] [Change Password] [Delete]
Homer J		Simpson	STATE_OFFICER1	SERGEANT-CAPTAIN	Active	Full Time	District 42, Versailles	AGENCY_ADMIN AGENCY_AD_HOC_REPORTING_TOOL	07/31/2023 09:28 AM MST	[Edit] [Emulate] [Change Password] [Delete]

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

## Filter Results List

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

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

## Add User Buttons

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

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

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

## User Accounts Tab

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

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

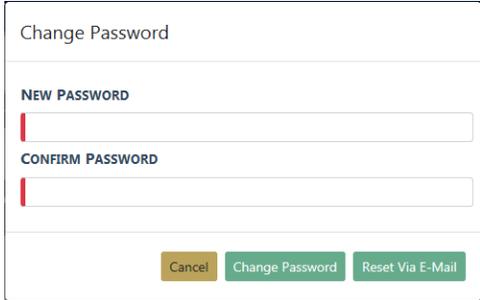
- Emulate users  icon
  - Click the Emulate icon under the *Actions* column.
  - See "Emulate a User" on page 121 for instructions.

- Change passwords  icon

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

### a. Change Password Icon

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



The image shows a "Change Password" window with the following elements:

- Title: Change Password
- Field: NEW PASSWORD (with a red vertical bar on the left)
- Field: CONFIRM PASSWORD (with a red vertical bar on the left)
- Buttons: Cancel, Change Password, Reset Via E-Mail

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

### b. Edit Icon

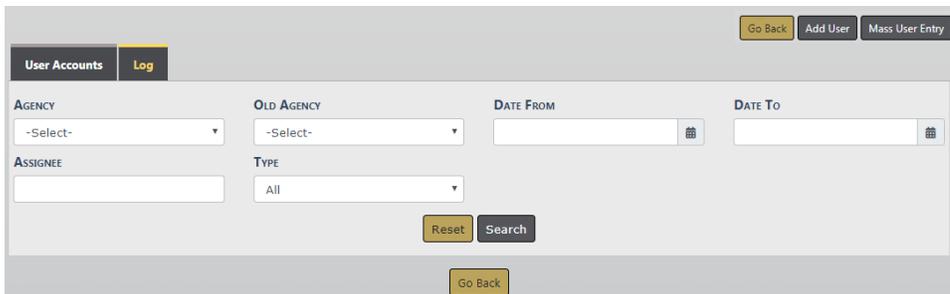
Click the **Edit icon** under the *Actions* column to open the *User Details* page, then click the **Change Password** link on the left sidebar navigation under *User Quick Links*. See "User Details" on the facing page for more information.

- Deactivate  and Activate  users icons
  - Click on the red or green person icon under the *Actions* column, whichever applies. (The example displays a red icon.)
  - See "Deactivate a User" on page 102 and "Activate a User" on page 101 for instructions.

## Log Tab

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

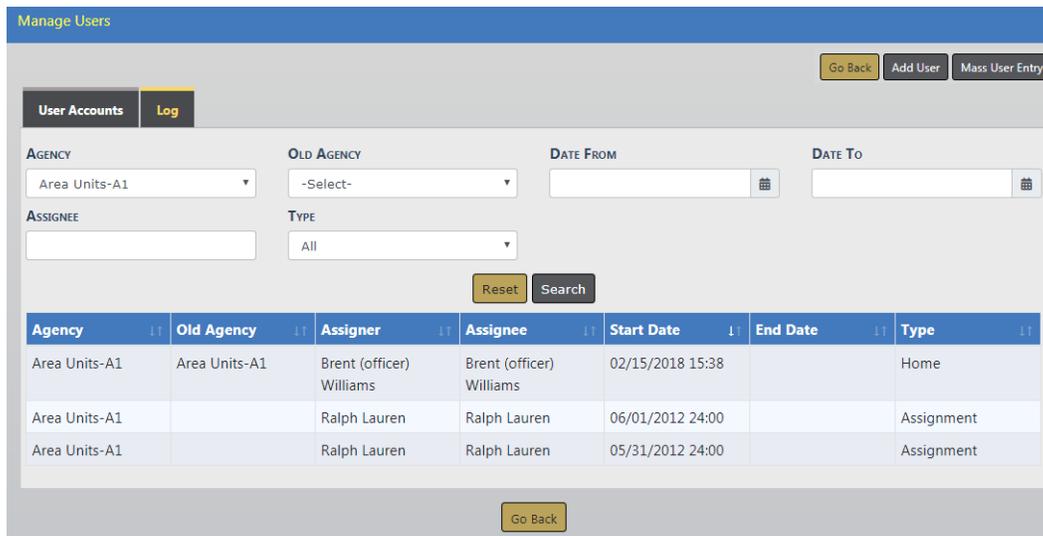
Click on the *Log* tab to open the search screen.



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

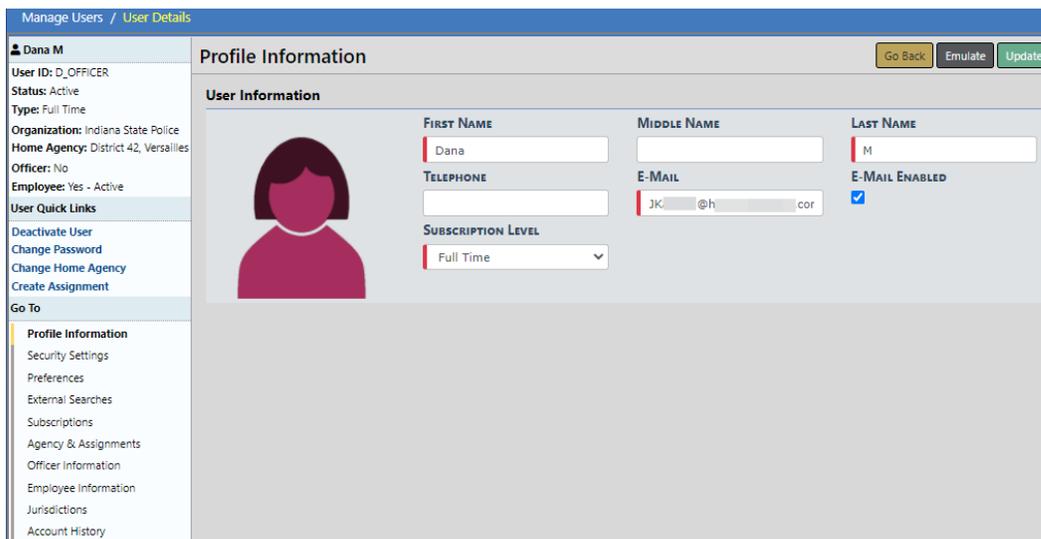
- Select a specific **Agency**. To select all, leave the choice as **-Select-**.
- Select a specific **Old Agency**. To select all, leave the choice as **-Select-**.
- Select the **Date From** and **Date To**, or leave them blank to select all dates.
- Enter all or part of the **Assignee** name, or leave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

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



## User Details

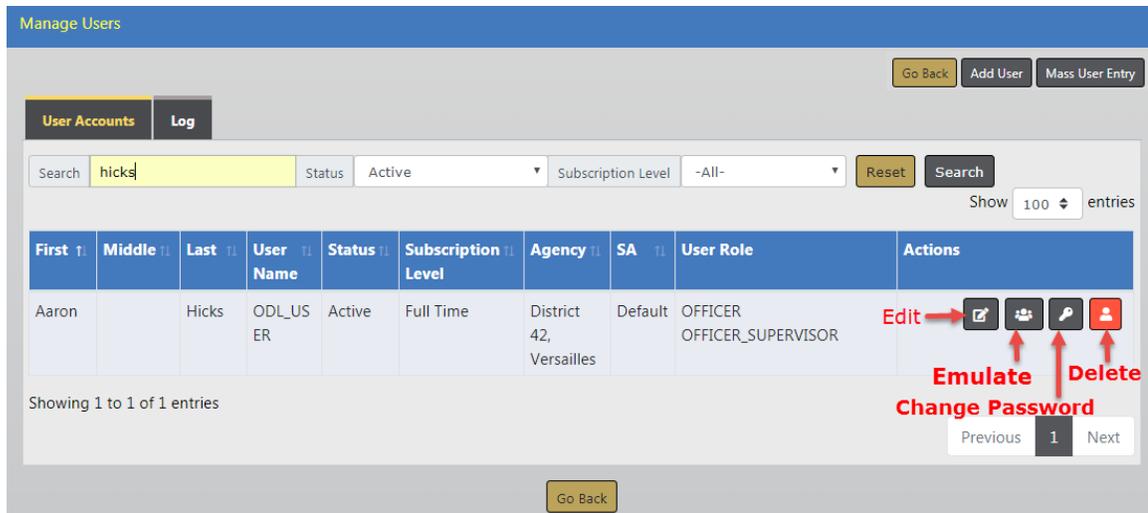
The *User Details* is a landing page that contains an organized set of links to various user settings and functions, such as security settings, officer information, employee information, profile information, change password, deactivate or activate account, and more.



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

## Access User Details

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



The screenshot displays the "Manage Users" interface. At the top, there are buttons for "Go Back", "Add User", and "Mass User Entry". Below this, there are tabs for "User Accounts" and "Log". A search bar contains the text "hicks", and there are dropdown menus for "Status" (set to "Active") and "Subscription Level" (set to "-All-"). There are "Reset" and "Search" buttons, and a "Show 100 entries" dropdown. The main content is a table with the following columns: First, Middle, Last, User Name, Status, Subscription Level, Agency, SA, User Role, and Actions. The table contains one entry for Aaron Hicks, with User Name "ODL\_USER", Status "Active", Subscription Level "Full Time", Agency "District 42, Versailles", and SA "Default". The User Role is "OFFICER" and "OFFICER\_SUPERVISOR". The Actions column contains four icons: a pencil (Edit), a person with a plus sign (Emulate), a key (Change Password), and a person with a minus sign (Delete). Red arrows point from the text labels "Edit", "Emulate", "Change Password", and "Delete" to their respective icons. Below the table, it says "Showing 1 to 1 of 1 entries" and "Previous 1 Next". At the bottom, there is a "Go Back" button.

First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions
Aaron		Hicks	ODL_USER	Active	Full Time	District 42, Versailles	Default	OFFICER OFFICER_SUPERVISOR	Edit Emulate Change Password Delete

## User Details Page Layout

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

<b>Dana M</b>
<b>User ID:</b> D_OFFICER
<b>Status:</b> Active
<b>Type:</b> Full Time
<b>Organization:</b> Indiana State Police
<b>Home Agency:</b> District 42, Versailles
<b>Officer:</b> No
<b>Employee:</b> Yes - Active
<b>User Quick Links</b>
<a href="#">Deactivate User</a>
<a href="#">Change Password</a>
<a href="#">Change Home Agency</a>
<a href="#">Create Assignment</a>
<b>Go To</b>
<b>Profile Information</b>
<a href="#">Security Settings</a>
<a href="#">Preferences</a>
<a href="#">External Searches</a>
<a href="#">Subscriptions</a>
<a href="#">Agency &amp; Assignments</a>
<a href="#">Officer Information</a>
<a href="#">Employee Information</a>
<a href="#">Jurisdictions</a>
<a href="#">Account History</a>

- **User Information.**

- Various user information, such as the user id, an active or inactive user account, whether the user is full or part time, the organization and home agency of the user, whether or not the user is an officer, and whether the user is an active or inactive employee.
- This section is read-only.

- **Quick Links.**

- Links for quick access to specific functions, such as the ability to quickly deactivate or inactivate the user, change the password, change their home agency, and create an assignment.

"Deactivate a User" on page 102

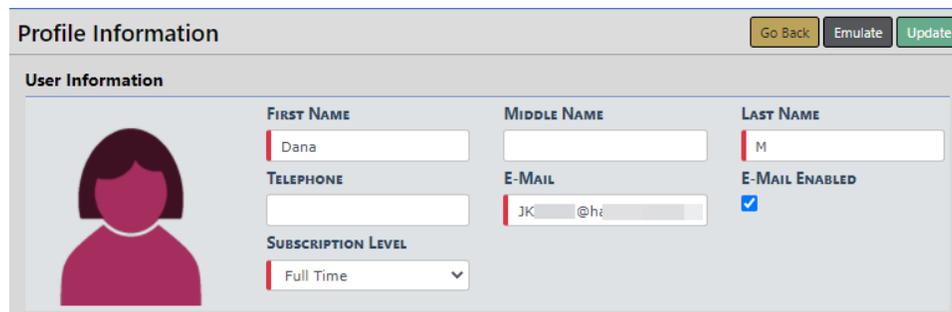
"Activate a User" on page 101

"Change Password" on page 103

"Change Home Agency" on page 104

"Create Assignment" on page 105

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



The screenshot shows the "Profile Information" page in a web application. At the top right, there are three buttons: "Go Back" (yellow), "Emulate" (grey), and "Update" (green). Below the title "Profile Information" is a section titled "User Information". On the left is a placeholder for a user profile picture. To the right of the picture are several input fields: "FIRST NAME" with the value "Dana", "MIDDLE NAME" (empty), "LAST NAME" with the value "M", "TELEPHONE" (empty), "E-MAIL" with the value "JK...@h...", and "E-MAIL ENABLED" with a checked checkbox. At the bottom is a "SUBSCRIPTION LEVEL" dropdown menu currently set to "Full Time".

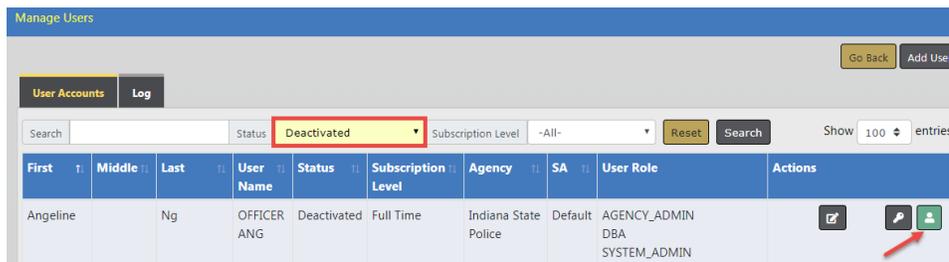
**Refer to the following for tab details:**

- "Profile Information Tab" on page 107
- "Security Settings Tab" on page 107
- "Preferences Tab" on page 109
- "Subscriptions Tab" on page 111
- "Agency & Assignments Tab" on page 111
- "Officer Information Tab" on page 113
- "Employee Information Tab" on page 115
- "Jurisdictions" on page 117
- "Account History" on page 120

## Activate a User

Use the following procedure to activate a user.

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



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

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

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

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

### Activate User

Please enter reason to activate this User:

Cancel
Activate

## Deactivate a User

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

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

Manage Users										
User Accounts										Log
First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions	
Aaron		Hicks	ODL_US ER	Active	Full Time	District 42, Versailles	Default	OFFICER OFFICER_SUPERVISOR	<span>Go Back</span> <span>Add User</span>	

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

### Deactivate User

Please enter reason to deactivate this User:

Cancel
Deactivate

## Change Password

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

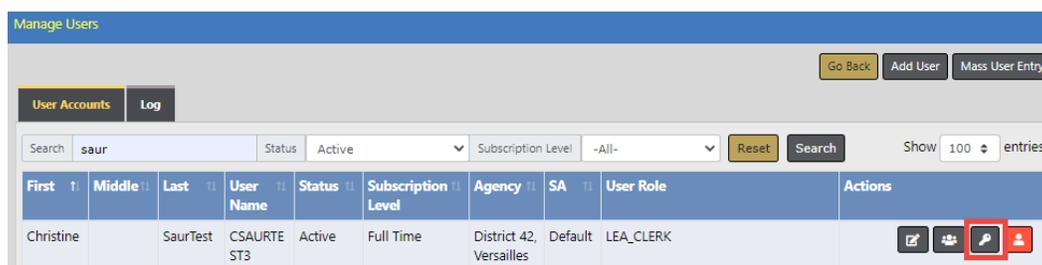
However, users are encouraged to reset their own password using the **forgot password** link on the login page. Refer to the *Forgotten Password Procedure* section in the *Online RMS User Guide* for instructions.

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

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

### Reset from Manage Users Page

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



### Reset from Users Detail Page

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

First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions
Christine		SaurTest	CSAURTEST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK	   

3. Click **Change Password**.

Manage Users / User Details

**Christine SaurTest**

User ID: CSAURTEST3  
 Status: Active  
 Type: Full Time  
 Organization: Indiana State Police  
 Home Agency: District 42, Versailles  
 Officer: No  
 Employee: Yes - Active

**User Quick Links**

Deactivate User  
**Change Password**  
 Change Home Agency  
 Create Assignment

Go To

Profile Information

## Change Home Agency

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

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

First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions
Christine		SaurTest	CSAURTEST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK	   

3. Click **Change Home Agency**.

Manage Users / User Details

**Christine SaurTest**

User ID: CSAURTEST3  
 Status: Active  
 Type: Full Time  
 Organization: Indiana State Police  
 Home Agency: District 42, Versailles  
 Officer: No  
 Employee: Yes - Active

User Quick Links

Deactivate User  
 Change Password  
 Change Home Agency  
 Create Assignment

Go To

Profile Information

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

Change Home Agency

District 42, Versailles

Cancel Save

5. Click **Save**.

## Create Assignment

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

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

Manage Users

Go Back Add User Mass User Entry

User Accounts Log

Search saur Status Active Subscription Level -All- Reset Search Show 100 entries

First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions
Christine		SaurTest	CSAURTEST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK	   

3. Click **Create Assignment**.



4. In the *New User Assignment* dialog box opens.

The screenshot shows the 'New User Assignment' dialog box. It has a title bar 'New User Assignment'. Below the title bar is a section labeled 'ASSIGNMENT' with a drop-down menu currently showing '-Select-'. Below this are two date fields: 'START DATE' and 'END DATE', each with a calendar icon to its right. Below the date fields is a section labeled 'ACTIVE' with a checked checkbox. At the bottom right of the dialog box are two buttons: 'Cancel' and 'Save'.

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

## Profile Information Tab

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

The screenshot shows a web form titled "Profile Information" with a "Go Back", "Emulate", and "Update" button bar at the top right. Below the title is a "User Information" section. On the left is a placeholder for a user profile picture. To the right are several input fields: "FIRST NAME" with "Christine", "MIDDLE NAME" (empty), "LAST NAME" with "SaurTest", "TELEPHONE" with "5551112222", "E-MAIL" with "ccsa", "E-MAIL ENABLED" with a checked checkbox, and "SUBSCRIPTION LEVEL" with a dropdown menu set to "Full Time".

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

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

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

## Security Settings Tab

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

### Roles and Security Levels

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

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

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

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

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

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

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

### Two Factor Authentication

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

### Mobile Integration

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

### Team Support

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

The following criteria must be met to utilize this feature:

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

Follow these steps to grant access to user:

1. Enter the user's **Team Support Login ID** or leave it blank.

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

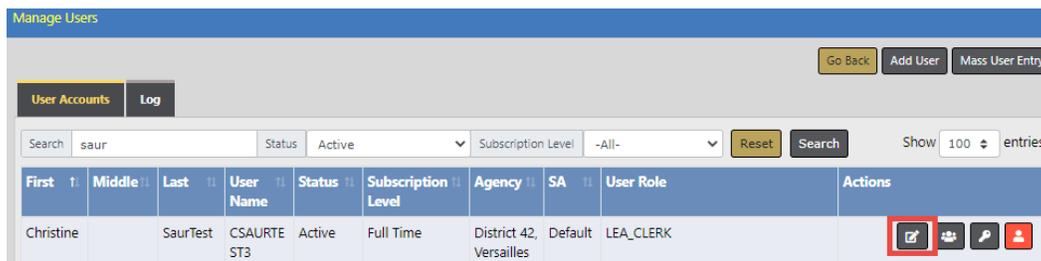
For more information on submitting support tickets, refer to the *Caliber Online RMS User Guide*.

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

## Preferences Tab

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

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



The screenshot shows the 'Manage Users' interface. At the top, there are buttons for 'Go Back', 'Add User', and 'Mass User Entry'. Below that, there are tabs for 'User Accounts' and 'Log'. A search bar contains 'saur' and filters for 'Status: Active' and 'Subscription Level: -All-'. A table lists user accounts with columns for First, Middle, Last, User Name, Status, Subscription Level, Agency, SA, User Role, and Actions. The user 'Christine' is listed with User Name 'CSAURTE ST3' and User Role 'LEA\_CLERK'. The 'Edit' icon in the Actions column for this user is highlighted with a red box.

First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions
Christine		SaurTest	CSAURTE ST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK	   

3. Click **Preferences** on the *User Details* page.

Manage Users / User Details

**Christine SaurTest**

User ID: CSAURTEST3  
Status: Active  
Type: Full Time  
Organization: Indiana State Police  
Home Agency: District 42, Versailles  
Officer: No  
Employee: Yes - Active

**User Quick Links**

Deactivate User  
Change Password  
Change Home Agency  
Create Assignment

**Go To**

Profile Information  
Security Settings  
**Preferences**  
Subscriptions

4. *Preferences* opens.

ODL\_USER - Profile Information Security Settings **Preferences** Subscriptions Officer Information Employee Information

Go Back Save

**Notification Settings** Edit User Filters

EMAIL NOTIFICATIONS PRIORITY: --Select--

AUDIBLE ALERT:

HOURS FOR NOTIFICATIONS: Begin: End:

ALWAYS SEND SUBSCRIPTION NOTIFICATIONS:

**Options**

INCIDENT SETUP WIZARD: On

DAY / NIGHT MODE: Normal / Day Mode

BREADCRUMB OPTIONS: Enabled - Always show Breadcrumbs on pages that use them

DEFAULT SEARCH AGENCY: All Agencies/Schema

**Default Search Interfaces**

SELECT SEARCH INTERFACES: Click To Select

**Geographic Areas**

COURT PAPERS: Click To Select

WARRANTS: Click To Select

Go Back Save

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

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

## Subscriptions Tab

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

Name	Type	Index Name	Reason	Creation Date	Actions
Vehicle	Index Accessed	. 336	Asdf	05/04/2017	[Edit] [Delete]
Property	Index Accessed	APPLIANCE 1588	Asdf	05/03/2017	[Edit] [Delete]

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

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

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

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

## Agency & Assignments Tab

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

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

First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions
Christine		SaurTest	CSAURTE ST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK	[Edit] [Add] [Mass] [Log]

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

Manage Users / **User Details**

**Christine SaurTest**

**User ID:** CSAURTEST3  
**Status:** Active  
**Type:** Full Time  
**Organization:** Indiana State Police  
**Home Agency:** District 42, Versailles  
**Officer:** No  
**Employee:** Yes - Active

**User Quick Links**

- Deactivate User
- Change Password
- Change Home Agency
- Create Assignment

**Go To**

- Profile Information
- Security Settings
- Preferences
- Subscriptions
- Agency & Assignments**
- Officer Information

4. *Agency & Assignments* opens.

**Agency & Assignments** Go Back Emulate Update

**Self Assignment**

**ENABLE SELF ASSIGNMENT**  
Default

**AGENCIES USER CAN SELF ASSIGN TO (NO SELECTION = ALL)**

Search... Select All Select None

- Area Units-A1
- Area Units-A2
- Area Units-A3
- Area Units-A4
- Area Units-A5
- CAR and X Units
- CID
- CIS-CID

**Supervised Agencies**

**SELECT SUPERVISED AGENCIES**

Search... Select All Select None

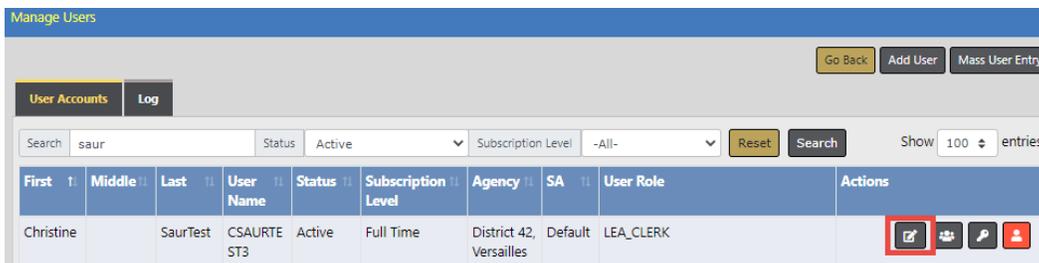
- Area Units-A1
- Area Units-A2
- Area Units-A3
- Area Units-A4
- Area Units-A5
- CAR and X Units
- CID
- CIS-CID

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

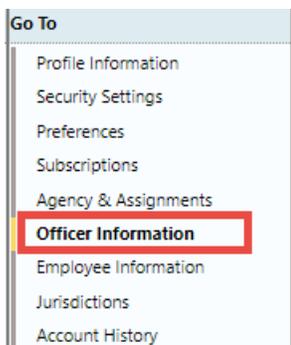
## Officer Information Tab

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

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



3. Click **Officer Information** on the *User Details* page.



4. *Officer Information* opens.

**Officer Information**

FIRST NAME: Dana  
 MIDDLE NAME:   
 LAST NAME: McMillan  
 SUFFIX:   
 TITLE: Patrol Officer

AGENCY: District 34, Jasper  
 BADGE #: DMM12345  
 DISPATCH ID: 6008a  
 CAD BADGE: 6008a  
 JOB STATUS:  Patrol  Detective  Active

**Officer History**

Date	Last Name	First Name	Middle Name	Suffix	Title	Agency	Badge Number	Dispatch Id	CAD Badge	Patrol	Detective	Active
2017-06-21	McMillan	Dana			Patrol Officer	District 42, Versailles	DMM12345		6008a	Y	N	N
2017-06-08	McMillan	Dana			Patrol Officer	District 34, Jasper	DMM12345		6008a	Y	N	N
2017-02-02	McMillan	Dana			Patrol Officer	District 42, Versailles	DMM12345		6008a	Y	N	N
2015-07-23	McMillan	Dana			Patrol Officer	District 42, Versailles	DMM12345			Y	N	N

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

**Officer Information**

No Officer Record Exists for This User

[Click Here to Add One](#)

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

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

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

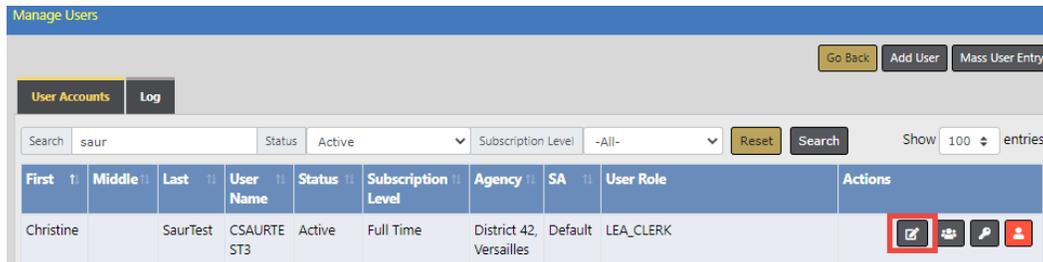
**Note:** The system does not allow you to create or reactivate an RMS user with a duplicate badge number.

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

## Employee Information Tab

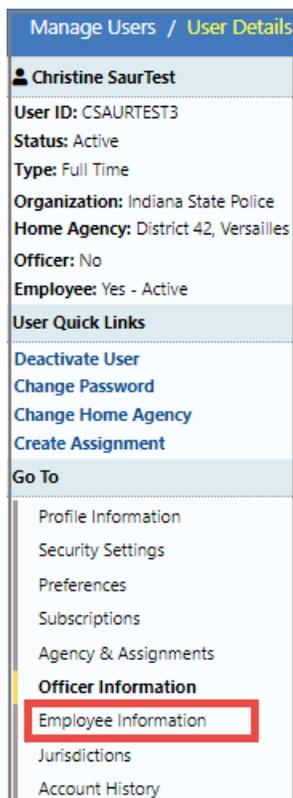
Administrators can update employee information from the *User Details* page.

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



First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions
Christine		SaurTest	CSAURTEST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK	   

3. Click **Employee Information** on the *User Details* page.



Manage Users / User Details	
<b>Christine SaurTest</b>	
User ID: CSAURTEST3	
Status: Active	
Type: Full Time	
Organization: Indiana State Police	
Home Agency: District 42, Versailles	
Officer: No	
Employee: Yes - Active	
<b>User Quick Links</b>	
Deactivate User	
Change Password	
Change Home Agency	
Create Assignment	
<b>Go To</b>	
Profile Information	
Security Settings	
Preferences	
Subscriptions	
Agency & Assignments	
<b>Officer Information</b>	
<b>Employee Information</b>	
Jurisdictions	
Account History	

4. *Employee Info* sub-tab opens.

**Employee Information** Go Back Emulate

**Employee Info** **Training** ← **Tabs**

**ACTIVE STATUS** Active **USER** CSAURTEST3

**AGENCY** District 42, Versailles

**LAST NAME** SaurTest **FIRST NAME** Christine **MIDDLE NAME**

**SUFFIX** **MAIDEN NAME** **TITLE** -Select-

**SEX** Female **RACE** White **ETHNICITY** -Select-

**SSN** **DOB** **PLACE OF BIRTH**

**EMPLOYEE ID** **EMPLOYEE TYPE** Patrol Sworn **EMPLOYEE LEVEL** -Select-

**HAND DOMINANCE** -Select- **BARGAINING UNIT** **BLOOD TYPE** -Select-

**LONGEVITY DATE** **HIRE DATE** **END DATE**

Go Back Update Save

**Employee History** +

**Service History** + Add Service History

**Education** + Add Education

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

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

**Employee Information** Go Back Emulate

**Employee Info** **Training**

**Courses** + Advanced Search + Quick Add Course +

**Certifications** + Add Certification +

**Eligible Ranks**

- Click the catalog icon  to the right of **Course** to view the course catalog.
- Click the catalog icon  to the right of **Certifications** to view the certification catalog.

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

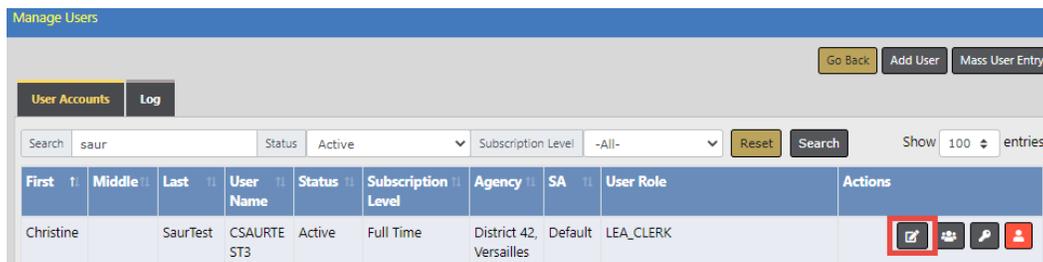
7. Click **Go Back** to return to the *Manage Users* page.

## Jurisdictions

You can update, add, enable or disable Jurisdictions.

### *Update or Add Jurisdiction*

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



The screenshot shows the 'Manage Users' interface. At the top, there are buttons for 'Go Back', 'Add User', and 'Mass User Entry'. Below that, there are tabs for 'User Accounts' and 'Log'. A search bar contains 'saur', and filters for 'Status: Active' and 'Subscription Level: -All-' are visible. A table lists user accounts with columns for First, Middle, Last, User Name, Status, Subscription Level, Agency, SA, User Role, and Actions. The 'Edit' icon in the Actions column for the user 'Christine' is highlighted with a red box.

First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions
Christine		SaurTest	CSAURTE ST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK	   

3. Click **Jurisdictions** on the *User Details* page.

Manage Users / User Details

**Christine SaurTest**

User ID: CSAURTEST3  
 Status: Active  
 Type: Full Time  
 Organization: Indiana State Police  
 Home Agency: District 42, Versailles  
 Officer: No  
 Employee: Yes - Active

**User Quick Links**

Deactivate User  
 Change Password  
 Change Home Agency  
 Create Assignment

**Go To**

- Profile Information
- Security Settings
- Preferences
- Subscriptions
- Agency & Assignments
- Officer Information**
- Employee Information
- Jurisdictions**
- Account History

4. *Jurisdictions* opens.

Jurisdictions							Go Back	Emulate	Add Jurisdiction
County	Agency	Date Created	Date Disabled	Default	Active	Actions			
ISP Test (TSTC)	District 42, Versailles	10/22/2020		Yes	Yes				

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

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

### Change the Default Jurisdiction

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

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

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

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

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

### Enable or Disable Jurisdictions

You can enable or disable Jurisdictions.

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

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

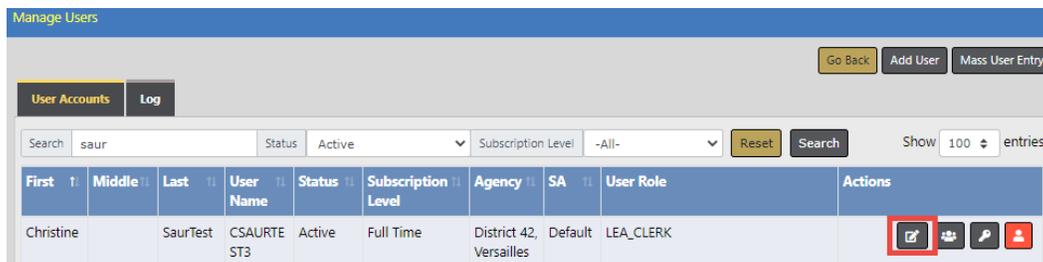
2. Click **Yes** to confirm, or **No** to return to Jurisdictions without performing the requested change.

## Account History

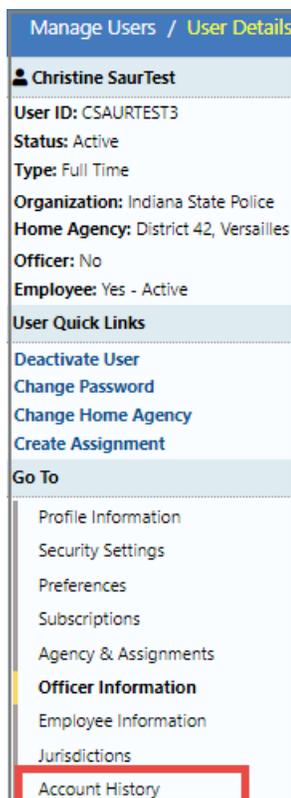
Caliber Public Safety Online RMS automatically captures and logs when users log in or out of the application and whenever user account statuses change.

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

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



3. Click **Account History** on the *User Details* page.



4. *Account History* opens as read-only.

There are two tabs: *Status History* and *Login History*.

The *Status History* tab opens by default.

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

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

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

## Emulate a User

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

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

There are two ways to Emulate a user:

- From the *Manage Users* page.

- From the *User Details* page.

## Manage Users Page

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

1. Access the *Manage Users* page and search for the user you want to emulate. For more information, refer to "Manage Users" on page 93.

2. Click on the emulate icon  in the Actions column to display that user's Home page.

## User Details Page

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

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



## Navigate Online RMS as the Emulated User

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

Count	Notification Type	Last Notification	Priority
1	Welcome to Online RMS	10/22/2020 06:04 PM EST	Low/Informational
47	WARRANT REMOVED FROM FIELD ARREST	10/21/2020 07:24 PM EST	High
1	FORM REVIEW - Online Police Self-Reporting Form	10/20/2020 04:54 PM EST	High
1	FORM REVIEW - test	10/20/2020 04:07 PM EST	High
10	FORM REVIEW	07/29/2020 02:10 PM EST	High
6	FORM REVIEW - INFORMATIONAL	02/14/2019 11:30 AM EST	High
3	WARRANT LOG	11/14/2018 03:39 PM EST	High
5	INCIDENT REPORT TRANSFERRED - CLERK	10/24/2018 11:59 PM EST	High

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

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

## Stop Emulating User

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

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

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



## Add a User

Use the following procedure to add one user record.

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

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

 The image shows two screenshots of the software interface. The top screenshot is the 'Manage Users' page, featuring a blue header with the title 'Manage Users'. Below the header is a navigation bar with buttons for 'Go Back', 'Add User', and 'Mass User Entry'. A red arrow points to the 'Add User' button, with the text 'Add a New User' written in red below it. The bottom screenshot is the 'Add User' form, also with a blue header showing 'Manage Users / Add User'. It contains a 'Go Back' button and a 'Save' button. The form is titled 'User Information' and includes a checkbox for 'This is a Caliber RMS Admin User'. Below this are several input fields: 'USER ID', 'PASSWORD', 'CONFIRM PASSWORD', 'FIRST NAME', 'MIDDLE NAME', 'LAST NAME', 'AGENCY' (a dropdown menu), 'E-MAIL', 'TELEPHONE', 'SEX' (radio buttons for 'Sworn' and 'Not Sworn'), 'RACE' (a dropdown menu), and 'SUBSCRIPTION LEVEL' (a dropdown menu). There is also a checkbox for 'Agency Administrator'.

**Note:** Agency administrators can easily track end-user subscriptions by monitoring the allocation and usage of **User Subscriptions**. If your agency's user subscription allowed limit has been reached, you receive a warning stating the maximum number has been reached and to contact support to add additional subscriptions, or deactivate

an existing user account. For more information on **User Subscriptions**, refer to "Agency Information Tab" on page 18 of the Agency Profile.

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

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

**Note:** Selecting an Employee record will add a field showing the Employee information and a button to de-select the record. Also, the Sex and Race fields will be disabled while an Employee is selected, as these fields now reflect an existing record's information (Sex and Race is stored solely in Employee records). Selecting an Officer record will also add a field showing the Officer information and a de-select button will appear. The Detective, Supervisor, Title, Badge #, and CAD ID fields will be disabled while an Officer is selected to reflect the selected officer's information. Selecting Not Sworn after selecting an Officer match will clear the selected Officer and all Officer fields.

3. Check **This is a Caliber RMS Admin User** if the user is an admin user, otherwise leave it blank.
4. Complete the form with the appropriate information.
  - You must choose either **Sworn** or **Not Sworn**. The user is automatically assigned roles to fit these needs.
  - Check the **Agency Administrator** box if applicable.
5. Click **Save** to save your entries to this tab.

**Note:** The system automatically creates an employee record.

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

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

## Add Mass Users

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

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

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

The screenshot shows the 'Manage Users' interface. At the top, there are buttons for 'Go Back', 'Add User', and 'Mass User Entry'. A red arrow points to the 'Mass User Entry' button, with the text 'Add Multiple Users' written below it. Below this is the 'Mass User Entry' form, which includes a 'Go Back' and 'Save' button. The form contains several fields: 'USER ID' (with 'csaur' entered), 'PASSWORD', 'CONFIRM PASSWORD', 'FIRST NAME', 'MIDDLE NAME', 'LAST NAME', 'AGENCY' (a dropdown menu), 'E-MAIL', 'TELEPHONE', 'SEX' (a dropdown menu), 'RACE' (a dropdown menu), and 'SUBSCRIPTION LEVEL' (a dropdown menu). There are also checkboxes for 'This is a Caliber RMS Admin User', 'Sworn', 'Not Sworn', and 'Agency Administrator'. A sidebar on the left contains a link 'Add Another User' and a 'NEW USER' button.

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

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

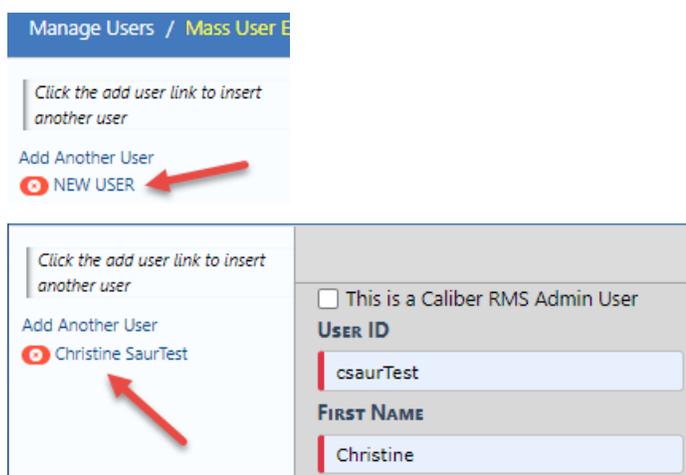
**Note:** When First Name, Last Name, Sex, and Race are entered, the app will check for duplicate Employee records matching these values. If any are found, a button will appear allowing you to select an Employee match to associate to the new user rather, than create a new employee record. Similarly,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

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

**Note:** Selecting an Employee record will add a field showing the Employee information and a button to de-select the record. Also, the Sex and Race fields will be disabled while an Employee is selected, as these fields now reflect an existing record's information (Sex and Race is stored solely in Employee records). Selecting an Officer record will also a field showing the Officer information and a de-select button will appear. The Detective, Supervisor, Title, Badge #, and CAD ID fields will be disabled while an Officer is selected to reflect the selected officer's information. Selecting Not Sworn after selecting an Officer match will clear the selected Officer and all Officer fields.

**Note:** Attempting to save a user add when a user has potential Employee/Officer matches, but for whom a match has not been selected, will display a dialog asking you if you wish to continue making new records despite matches to existing records. If multiple user records select the same Employee/Officer record, a validation error will occur.

3. Check **This is a Caliber RMS Admin User** if an admin user, otherwise leave it blank.
4. Complete the form with the appropriate information.
  - You must choose either **Sworn** or **Not Sworn**.
  - When you enter the person's first and last name, the NEW USER name on the left changes to the first and last name as shown below.



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

Manage Users / Mass User Entry

Click the add user link to insert another user

**Add Another User**

- Christine SaurTest
- NEW USER

This is a Caliber RMS Admin User

**USER ID** | **PASSWORD** | **CONFIRM PASSWORD**

csaurTest | \*\*\*\*\* | \*\*\*\*\*

**FIRST NAME** | **MIDDLE NAME** | **LAST NAME**

Christine | | SaurTest

**AGENCY** | **E-MAIL** | **TELEPHONE**

District 42, Versailles | ccsaur1@gmail.com | 5551112222

\*  Sworn  Not Sworn

Agency Administrator  
 Organization Administrator

**SEX** | **RACE** | **SUBSCRIPTION LEVEL**

Female | White | Full Time (987 Remaining)

---

This is a Caliber RMS Admin User

**USER ID** | **PASSWORD** | **CONFIRM PASSWORD**

| | |

**FIRST NAME** | **MIDDLE NAME** | **LAST NAME**

| | |

**AGENCY** | **E-MAIL** | **TELEPHONE**

-Select- | |

\*  Sworn  Not Sworn

Agency Administrator

**SEX** | **RACE** | **SUBSCRIPTION LEVEL**

-Select- | -Select- | -Select-

**Go Back** **Save**

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

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

# Chapter 8. Personnel Management

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

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

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

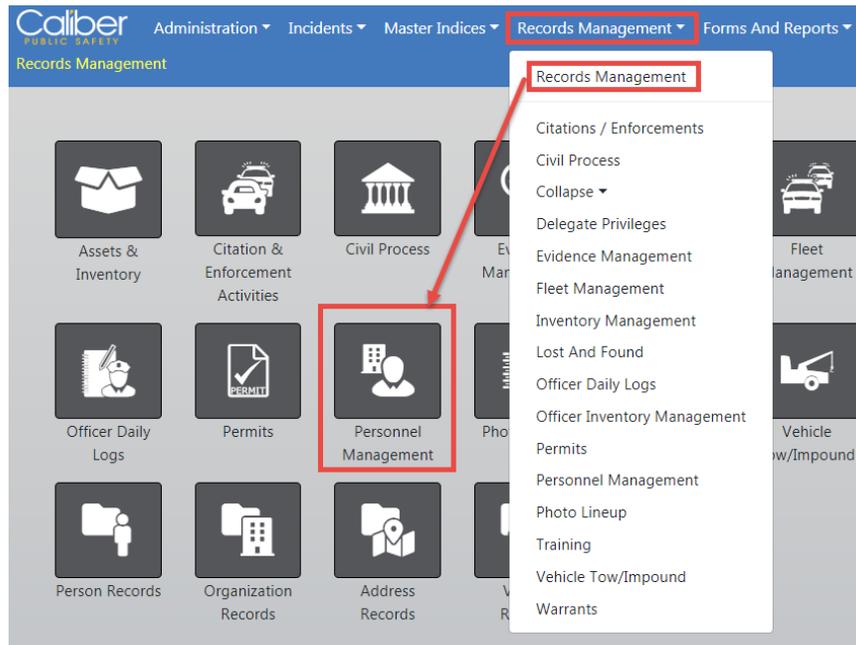
**Note:** The new permission categories are assigned to the *System\_Admin*, *Organization\_Admin*, and *Agency\_Admin* roles, respectively, for the initial 10.30 release.

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

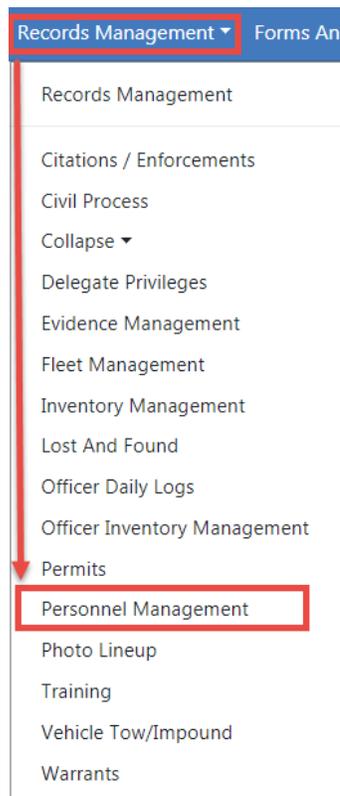
## Access Personnel Management

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

### Option 1



### Option 2



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

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

## Employee Search

Use the following procedure to search for specific employee records.

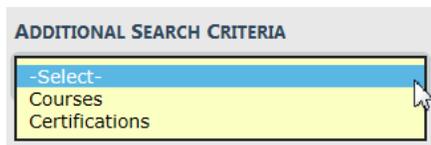
1. Access the *Personnel Management* page. (See "Access Personnel Management" on page 129, if needed.)
2. Enter the search criteria on the *Employee Search* page. Enter data into as many fields as you would like. The more information you enter, the shorter the search results, or leave all fields blank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

The screenshot shows the 'Employee Search' interface. At the top left is the Caliber Public Safety logo and the breadcrumb 'Records Management / Employee Search'. At the top right are 'Go Back' and 'Search' buttons. Below the header is the 'Employee Search' title and an 'Add Employee' button. The form is organized into three columns of fields:

- Column 1:** ACTIVE STATUS (dropdown: Active), LAST NAME (text), SUFFIX (text), SEX (dropdown: -Select-), SSN (text), EMPLOYEE ID (text), HAND DOMINANCE (dropdown: -Select-), LONGEVITY DATE FROM (calendar), HIRE DATE FROM (calendar), END DATE FROM (calendar).
- Column 2:** USER NAME (text), FIRST NAME (text), MAIDEN NAME (text), RACE (dropdown: -Select-), DOB (calendar), EMPLOYEE TYPE (dropdown: -Select-), BARGAINING UNIT (text), LONGEVITY DATE TO (calendar), HIRE DATE TO (calendar), END DATE TO (calendar).
- Column 3:** AGENCY (dropdown: All Agencies), MIDDLE NAME (text), TITLE (dropdown: -Select-), ETHNICITY (dropdown: -Select-), PLACE OF BIRTH (text), EMPLOYEE LEVEL (dropdown: -Select-), BLOOD TYPE (dropdown: -Select-), IS SYSTEM USER (radio buttons: Yes, No).

At the bottom, there is an 'ADDITIONAL SEARCH CRITERIA' dropdown (set to -Select-) and 'Go Back', 'Reset', and 'Search' buttons.

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



**Note:** Leave the **Is System User** Yes and No options **blank** to return a list of employees that match the search criteria, regardless of whether or not they are Online RMS users. Click **Yes** to return a list of employees that *are only* Online RMS users. Click **No** to return a list of only employees that *are not* Online RMS users.

3. Click the **Search** button at the bottom of the page to display the *Employee Search Results*, or click the **Reset** button to remove the entered criteria to start the search over.

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

### Employee Search Results Example



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

Refer to the *OnlineRMS User Guide* for instructions on exporting search results to a file.

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

## Add an Employee

Use the following procedure to add an employee record.

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

The image shows two screenshots of a web application interface. The top screenshot is the 'Employee Search' page, which has a blue header with the text 'Records Management / Employee Search'. Below the header, there is a section titled 'Employee Search' with a red-bordered button labeled 'Add Employee' on the right. The search form includes fields for 'ACTIVE STATUS' (a dropdown menu with 'Active' selected), 'USER NAME' (a text input), 'AGENCY' (a dropdown menu with 'All Agencies' selected), 'LAST NAME' (a text input), 'FIRST NAME' (a text input), and 'MIDDLE NAME' (a text input). The bottom screenshot is the 'Employee' form, which has a grey header with a 'Go Back' button on the right. The form contains numerous fields for employee information, including 'ACTIVE STATUS' (dropdown with '-Select-'), 'AGENCY' (dropdown with 'District 42, Versailles'), 'LAST NAME', 'FIRST NAME', 'MIDDLE NAME', 'SUFFIX', 'MAIDEN NAME', 'TITLE' (dropdown with '-Select-'), 'SEX' (dropdown with '-Select-'), 'RACE' (dropdown with '-Select-'), 'ETHNICITY' (dropdown with '-Select-'), 'SSN', 'DOB' (calendar icon), 'PLACE OF BIRTH', 'EMPLOYEE ID', 'EMPLOYEE TYPE' (dropdown with '-Select-'), 'EMPLOYEE LEVEL' (dropdown with '-Select-'), 'HAND DOMINANCE' (dropdown with '-Select-'), 'BARGAINING UNIT', 'BLOOD TYPE' (dropdown with '-Select-'), 'LONGEVITY DATE' (calendar icon), 'HIRE DATE' (calendar icon), and 'END DATE' (calendar icon). At the bottom of the form are 'Go Back' and 'Save' buttons.

3. Enter the applicable information in the fields provided.

The screenshot shows a personnel management form with the following fields and values:

- ACTIVE STATUS:** Active (dropdown)
- AGENCY:** District 42, Versailles (dropdown)
- LAST NAME:** (empty text field)
- FIRST NAME:** (empty text field)
- MIDDLE NAME:** (empty text field)
- SUFFIX:** (empty text field)
- MAIDEN NAME:** (empty text field)
- TITLE:** -Select- (dropdown)
- SEX:** Female (dropdown)
- RACE:** -Select- (dropdown)
- ETHNICITY:** -Select- (dropdown)
- SSN:** \*\*\*-\*\*-1214 (text field)
- DOB:** (empty text field)
- PLACE OF BIRTH:** (empty text field)
- EMPLOYEE ID:** (empty text field)
- EMPLOYEE TYPE:** Communications Personnel (dropdown)
- EMPLOYEE LEVEL:** -Select- (dropdown)
- HAND DOMINANCE:** -Select- (dropdown)
- BARGAINING UNIT:** (empty text field)
- BLOOD TYPE:** -Select- (dropdown)
- LONGEVITY DATE:** (empty text field)
- HIRE DATE:** (empty text field)
- END DATE:** (empty text field)

Buttons: Go Back (top right), Go Back (bottom left), Save (bottom center).

- All but the last four digits of the entered SSN is masked with asterisks for privacy purposes.

4. Click **Save** to display additional data options.

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

### Additional Data

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

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

Example:

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

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

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

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

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

## Manage an Employee

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

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

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

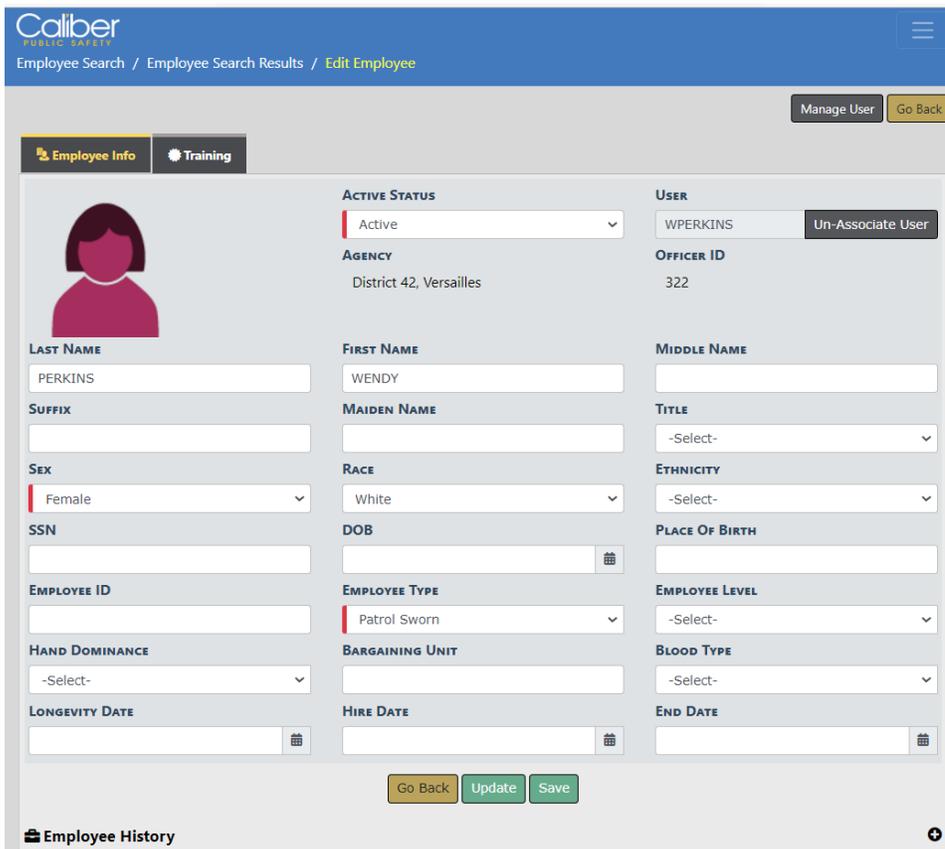
## Update Existing Employee Record

Use the following procedure to update an employee record.

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



Last Name	First Name	Middle Name	Employee ID	Employee Type	User ID	Agency	Actions
Clark	Christine			Communications Personnel		District 42, Versailles	



Caliber PUBLIC SAFETY  
Employee Search / Employee Search Results / Edit Employee

Manage User Go Back

Employee Info Training

**ACTIVE STATUS**  
Active

**AGENCY**  
District 42, Versailles

**USER**  
WPERKINS Un-Associate User

**OFFICER ID**  
322

**LAST NAME**  
PERKINS

**FIRST NAME**  
WENDY

**MIDDLE NAME**  
-Select-

**SUFFIX**  
-

**MAIDEN NAME**  
-

**TITLE**  
-Select-

**SEX**  
Female

**RACE**  
White

**ETHNICITY**  
-Select-

**SSN**  
-

**DOB**  
-

**PLACE OF BIRTH**  
-

**EMPLOYEE ID**  
-

**EMPLOYEE TYPE**  
Patrol Sworn

**EMPLOYEE LEVEL**  
-Select-

**HAND DOMINANCE**  
-Select-

**BARGAINING UNIT**  
-

**BLOOD TYPE**  
-Select-

**LONGEVITY DATE**  
-

**HIRE DATE**  
-

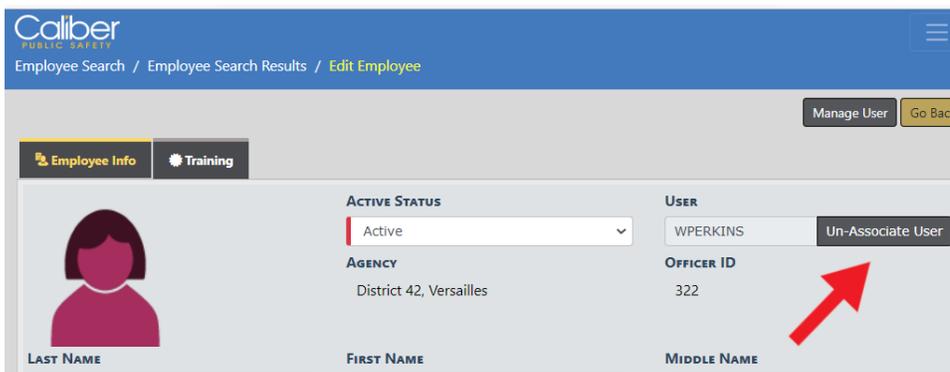
**END DATE**  
-

Go Back Update Save

Employee History

4. To add an employee picture, page down while on the *Employee Info* tab then click the **Add Attachment** link, upload the photo, then choose **Employee Photo** as the image type.
5. Make other changes as needed on the *Employee Info* tab. Refer to "Add an Employee" on page 132 for instructions on adding additional data options.

**Note:** The Associate/Un-Associate User button appears as either Associate User or Un-Associate User depending on whether there is an existing user ID associated with the employee. Click the **Associate User** button to find potential matches to Online RMS user IDs based on First Name and Last Name. Click the **Un-Associate User** button to de-link an employee from a user ID.



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



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

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

### Courses

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

The screenshot shows a form titled "Course" with a close button (X) in the top right corner. The form contains the following fields: "COURSE" (a dropdown menu with "-Select-" selected), "COST" (a text input field), "SCORE" (a text input field), "PASS/FAIL" (a dropdown menu with "-Select-" selected), "ON DUTY" (a dropdown menu with "-Select-" selected), and "COMPLETED DATE" (a text input field with a calendar icon). At the bottom of the form are three buttons: "Cancel" (yellow), "Add Details" (green), and "Save" (green).

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

The screenshot shows the "Advanced Search" interface. It has a grid of search filters: "NAME", "AGENCY" (dropdown with "All Agencies" and a plus icon), "COURSE TYPE" (dropdown with "-Select-"), "COURSE CLASSIFICATION" (dropdown with "-Select-"), "COURSE ID", "CATALOG COURSE" (dropdown with "-Select-"), "INSTRUCTOR", "LOCATION", "START DATE FROM", "START DATE TO", "END DATE FROM", "END DATE TO", and "ADDITIONAL SEARCH CRITERIA" (dropdown with "-Select-"). At the top right are "Go Back" and "Add Course" buttons. At the bottom are "Go Back", "Reset", and "Search" buttons.

Click the **Hand** icon to select the course.

The screenshot shows a search results table with the following columns: "Course", "Location", "# Attendees", "Start Date", "End Date", "Agency", and "Actions". The first row contains the data: "Advanced K-9 Training 201", "0", "Area Units-A1". A red hand icon is highlighted in the "Actions" column for the first row. Above the table are "Refine Search" and "New Search" buttons. Below the table are "Previous", "1", "2", and "Next" navigation links. A status bar above the table indicates "29 result(s) found".

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

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

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

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

Message From RMS

Are You Sure?

No Yes

### Certifications

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

**Certification**  Click to view Certification Catalog

CERTIFICATION

Tazer   Click to view details

DATE OF INFO

02/26/2019 

Cancel Save

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

Message From RMS

Are You Sure?

No Yes

### Eligible Ranks

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

### Update

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

### Save

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

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

## Delete Additional Options

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

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

Education			+ Add Education
Education	Comments	Date Of Info	Actions
GED Certification		02/28/2018	 
Certification		12/02/2017	 

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

Message From RMS

---

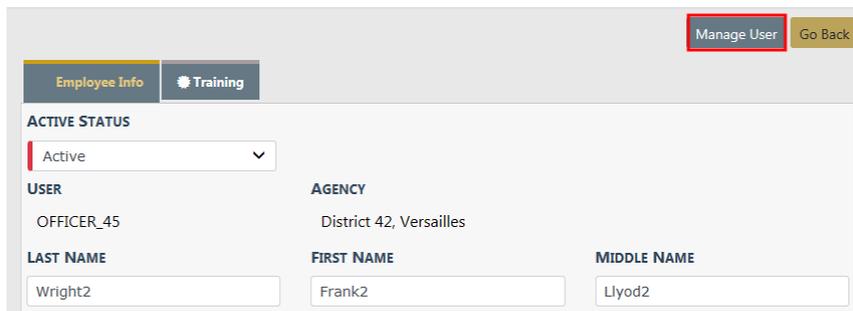
Are You Sure?

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

**Note:** *Additional Options* are not *Archived* (saved).

## Navigate to the User Record

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



The screenshot shows a web interface for an employee record. At the top right, there are two buttons: "Manage User" (highlighted with a red box) and "Go Back". Below these are two tabs: "Employee Info" (selected) and "Training". The main content area is titled "ACTIVE STATUS" and contains a dropdown menu set to "Active". Below this, there are three columns of information: "USER" (OFFICER\_45), "AGENCY" (District 42, Versailles), "LAST NAME" (Wright2), "FIRST NAME" (Frank2), and "MIDDLE NAME" (Llyod2).

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

# Chapter 9. Criminal Complaint

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

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

Court Cases can be associated with Criminal Complaints.

## Two Approval Levels

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

### Level 1

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

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

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

### Level 2

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

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

The supervisor approves the complaint.

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

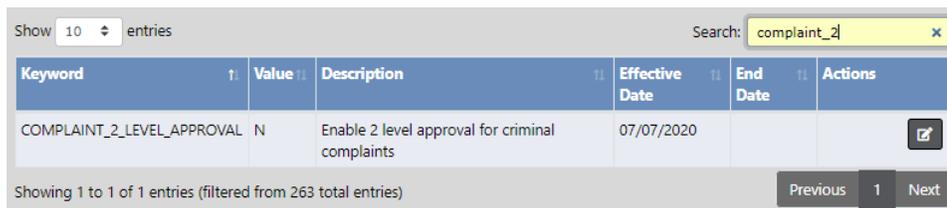
The court officer submits the approved complaint data to the court.

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

## Turn on Criminal Complaint Approval Level 2

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

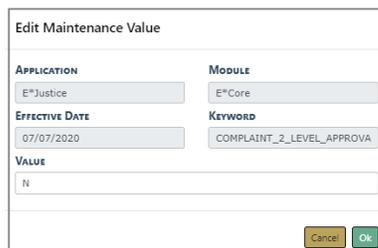
1. Access the **Maint Value** table. For instructions, refer to “Access Maintenance Values” on page 346.
2. In the Search field, type **complaint\_2** to display the record.



Keyword	Value	Description	Effective Date	End Date	Actions
COMPLAINT_2_LEVEL_APPROVAL	N	Enable 2 level approval for criminal complaints	07/07/2020		

Showing 1 to 1 of 1 entries (filtered from 263 total entries)      Previous 1 Next

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



Edit Maintenance Value

APPLICATION	MODULE
E*Justice	E*Core
EFFECTIVE DATE	KEYWORD
07/07/2020	COMPLAINT_2_LEVEL_APPROVA
VALUE	
N	

Cancel OK

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

## Configurations

### Permissions

The following permissions are available:

- Criminal Complaint - Add and Edit
- Criminal Complaint - Delete

- Criminal Complaint - View
- Criminal Complaint - Review
- Criminal Complaint - Always Edit

## New Number Generation Types

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

## EJS\_CODES

- Criminal Complaint Type = CRIM\_CMPLNT\_TYPE\_CODES
  - Out of the box values: Arrest, Hearing, Summons, Warrant
- Criminal Type of Hearing = CC\_HEARING\_TYPE\_CODES
  - Out of the box values: Without Notice, Accused Not Arrested
- Criminal Threat Type = CC\_THREAT\_TYPE\_CODES
  - Out of the box values: Bodily Injury, Commission of a Crime, Flight Risk
- Complaint Charge Type = CRIM\_CPLT\_CHARGE\_TYPE\_CODES
  - Out of the box values: One or More Felonies, Only Misdemeanors

## Notification Types

- Criminal Complaint Approval Request
- Criminal Complaint Disapproved

- Criminal Complaint Ready to be Submitted

## Recent Activities - Show Complaints Submitted in Set Number of Days

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

1. Access the **Maint Value** table. For instructions, refer to “Access Maintenance Values” on page 346.
2. In the Search field, type **crim\_comp** to display the record.

Keyword	Value	Description	Effective Date	End Date	Actions
CRIM_COMP_SUBMIT_DAYS	10	Used for recent activities, complaints submitted in XX days.	08/19/2020		

Showing 1 to 1 of 1 entries (filtered from 267 total entries)

Previous 1 Next

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

**Edit Maintenance Value**

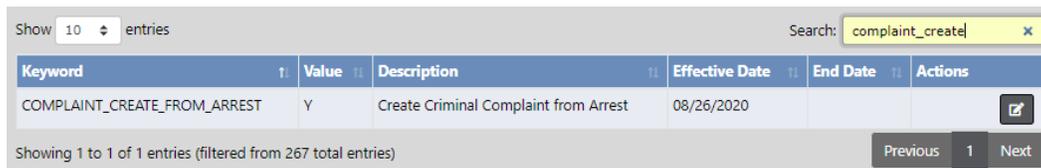
<b>APPLICATION</b> E*Justice	<b>MODULE</b> E*Core
<b>EFFECTIVE DATE</b> 08/19/2020	<b>KEYWORD</b> CRIM_COMP_SUBMIT_DAYS
<b>VALUE</b> 10	

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

## Create Criminal Complaint from Arrest

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

1. Access the **Maint Value** table. For instructions, refer to “Access Maintenance Values” on page 346.
2. In the Search field, type **complaint\_create** to display the record.

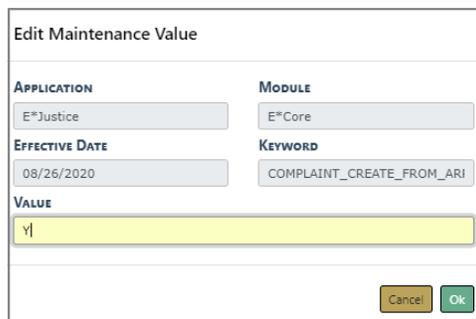


The screenshot shows a table with the following data:

Keyword	Value	Description	Effective Date	End Date	Actions
COMPLAINT_CREATE_FROM_ARREST	Y	Create Criminal Complaint from Arrest	08/26/2020		

Showing 1 to 1 of 1 entries (filtered from 267 total entries)

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



The dialog box contains the following fields:

APPLICATION	MODULE
E*Justice	E*Core
EFFECTIVE DATE	KEYWORD
08/26/2020	COMPLAINT_CREATE_FROM_ARI
VALUE	
Y	

Buttons: Cancel, Ok

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



# Chapter 10. Court Cases

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

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

Court Cases can be associated with Criminal Complaints.

## Configurations

### Permissions

The following permissions are available:

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

### EJS\_CODES

- Appearance Type = COURT\_APP\_CODES
- Appearance Reason = COURT\_APP\_REASON\_CODES
- Appearance Status = COURT\_APP\_STATUS\_CODES
  - Values: Active, Closed, Dismissed, CWOFF, Guilty, Not Guilty

- Court Case Reference Number Type
- Court Case Status = COURT\_CASE\_STATUS\_CODES
  - Values: Filed, Active, Denied, Closed

## Notification Types

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

# Chapter 11. Training Module

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

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

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

There are two components to the **Training Module**:

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

## Template

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

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

## Course Instance

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

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

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

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

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

- Training - Schema Level Management (System Level)
- Training - Organization Level Management (Multi-tier Agency Level)
- Training - Agency Level Management

**Note:** The new permission categories are assigned to the *System\_Admin*, *Organization\_Admin*, and *Agency\_Admin* roles, respectively, for the initial 10.31 release.

## Access Course Configuration

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

The screenshot shows a dashboard with three main sections: System, Security, and Maintenance. Under System, there are 'Manage System' and 'Agencies (75)'. Under Security, there are 'Roles (45)', 'Security Groups (10)', and 'Users (204)'. Under Maintenance, there are 'Permissions (2258)', 'Tables', and 'Custom Forms'. A red box highlights the 'Module Admin' link located below the 'Permissions (2258)' link.

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

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

**Training Administration** Go Back

Course Templates Maintenance Settings Course Types Course Classifications ← Four tabs

Add Course Template

Name	Description	Prerequisites	Active	Actions
ANG Test			Yes	
Advanced K-9 Training 201			Yes	
Agency Startup			Yes	
Andy Test			Yes	
Basic Training 100			Yes	
Basic Training 102			Yes	
Bookkeeping			Yes	
Dana Course			Yes	
EMP TEST			Yes	
Employee Training			Yes	
Firearms Training			Yes	
Gun Safety			Yes	
Gun Safety 101			Yes	
Intermediate Training			No	
K-9 Training 101			Yes	
MY TEMPLATE			Yes	

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

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

## Configure Courses

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

## ***Number of Days Nearing Expiration***

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

## **Manage Course Configurations**

There are four configurations associated with a Course:

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

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

It is best practice to configure the courses in the order listed, as *Course Types* and *Course Classifications* must exist before assigning them to a *Course Template*. For more information on associating a Course Type and Course Classification with a Course Template refer to [#CourseTemplates](#).

## ***Course Types***

### **Add Course Type**

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

**Training Administration** Go Back

Course Templates Maintenance Settings **Course Types** Course Classifications

Add Course Type

Code	Description	Active	Actions
ADVANCED	Advanced Training	Yes	 
BASIC	Basic Training	Yes	 
ELITE	Elite Training 2	No	 
INTERMEDIATE	Intermediate Training	Yes	 

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

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

Course Type Code

**CODE**

**DESCRIPTION**

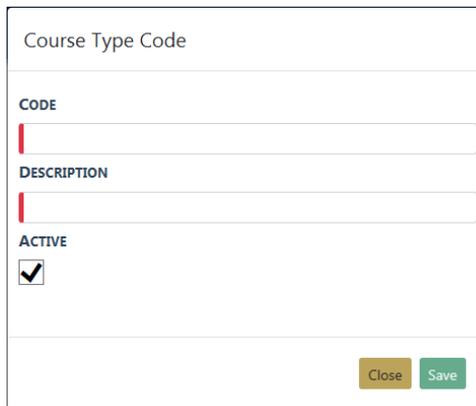
**ACTIVE**

Close Save

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

### Update Course Type

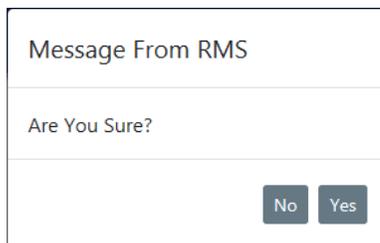
1. Click the **Edit** icon  in the Action column on the *Course Type* you want to update.
2. Make the necessary changes then click **Save**, or click **Close** to return to Training Administration without saving your changes.



A screenshot of a web form titled "Course Type Code". The form has three main sections: "CODE" with a text input field, "DESCRIPTION" with a text input field, and "ACTIVE" with a checked checkbox. At the bottom right, there are two buttons: "Close" (yellow) and "Save" (green).

### Delete Course Type

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



A screenshot of a confirmation dialog box titled "Message From RMS". The text inside says "Are You Sure?". At the bottom, there are two buttons: "No" (grey) and "Yes" (green).

- a. If the *Course Type* is associated with a *Course Template* a message appears at the top of the screen stating it cannot be deleted. For more information on associating a *Course Type* with a *Course Template* refer to [#CourseTemplates](#).

## Course Classifications

### Add Course Classification

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

**Training Administration** Go Back

Course Templates Maintenance Settings Course Types **Course Classifications**

+ Add Course Classification

Code	Description	Active	Actions
CLASS1	Classification 1	Yes	 
CLASS2	Classification 2	Yes	 
CLASS3	Classification 3	No	 

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

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

Course Classification Code

**CODE**

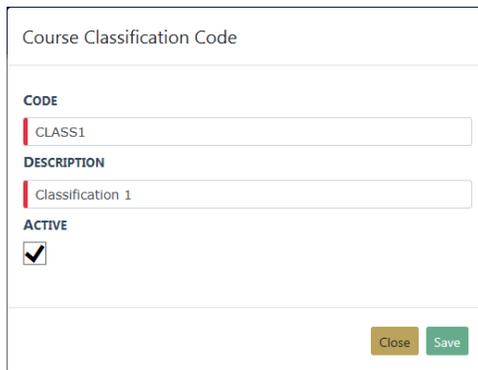
**DESCRIPTION**

**ACTIVE**

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

### Update Course Classification

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



Course Classification Code

**CODE**  
CLASS1

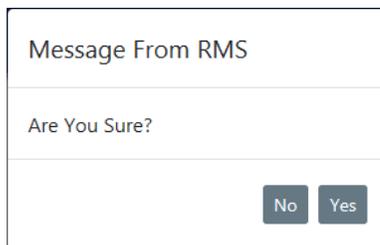
**DESCRIPTION**  
Classification 1

**ACTIVE**

Close Save

### Delete Course Classification

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



Message From RMS

Are You Sure?

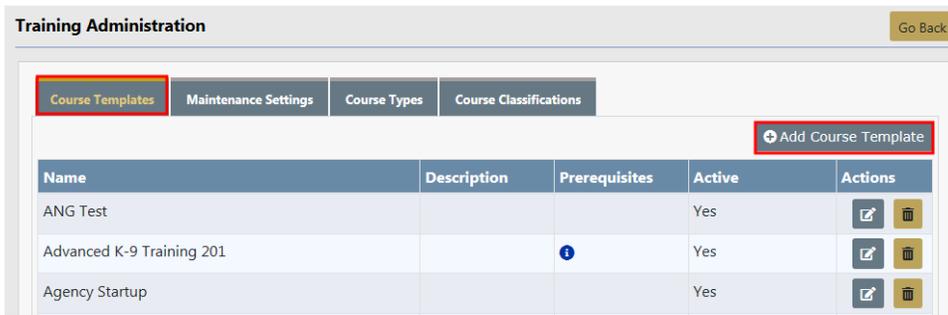
No Yes

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

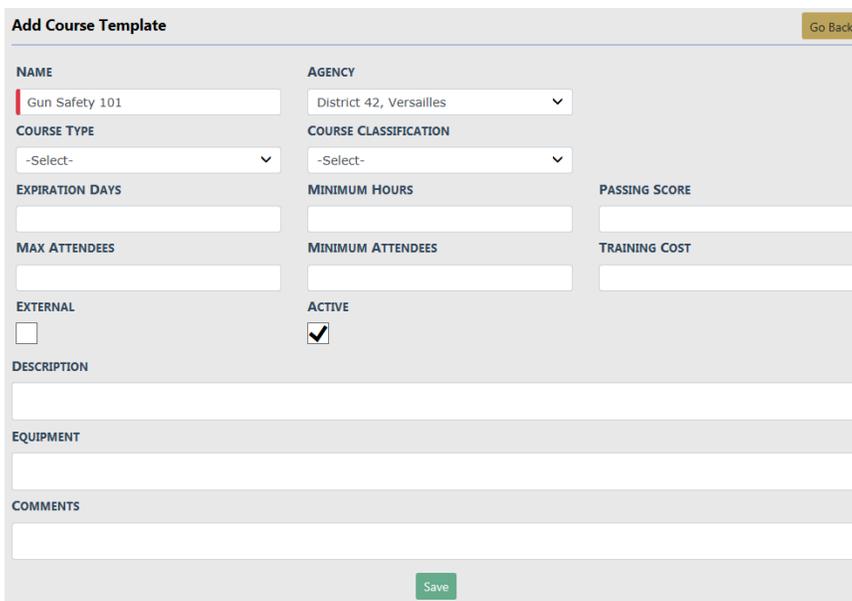
## Course Templates

### Add Template

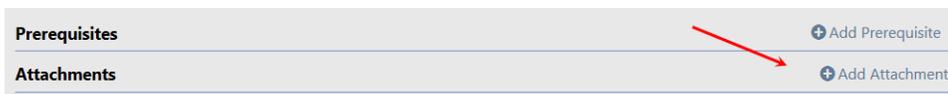
1. Click on the **Course Templates** sub-tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 152.
2. Click the **Add Course Template** link. to open the *Add Course Template* window.



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



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



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



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

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

### Update Template

1. Click on the **Course Templates** tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 152.
2. Locate the template you want to edit then click on the **Edit** icon in the *Action* column.

**Note:** A blue Information Bubble appears in the *Description* and *Prerequisites* columns when details have been entered into these fields. Hover over the bubble to view a portion of the data, or click on the blue bubble to view the entire entry.

Name	Description	Prerequisites	Active	Actions
ANG Test	Click the information bubble to view details		Yes	
Advanced K-9 Training 201			Yes	

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

### Delete Template

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

Message From RMS

---

Are You Sure?

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

## Maintenance Settings

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

### Set Number of Days Nearing Expiration

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

Training Administration <span style="float: right;">Go Back</span>				
Course Templates		Maintenance Settings	Course Types	Course Classifications
Keyword	Description	Value	Actions	
TRAINING_CERTIFICATION_DASHBOARD_NEAR_EXPIRED_DAYS	Display Certifications that are going to expire this many days from today.	30		
TRAINING_COURSE_DASHBOARD_NEAR_EXPIRED_DAYS	Display Courses that are going to expire this many days from today.	30	<b>Edit</b> 	

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

Maint Val

**KEYWORD**  
TRAINING\_CERTIFICATION\_DASHBOARD\_NEAR\_EXPIRED\_DAYS

**DESCRIPTION**  
Display Certifications that are going to expire this many days from today.

**VALUE**  
30

Close Save

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



# Chapter 12. Training Videos Module

## Training Videos Overview

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

## Video Rules and Requirements

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

## Benefits of Video-Based Learning

- A cost-effective training approach.

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

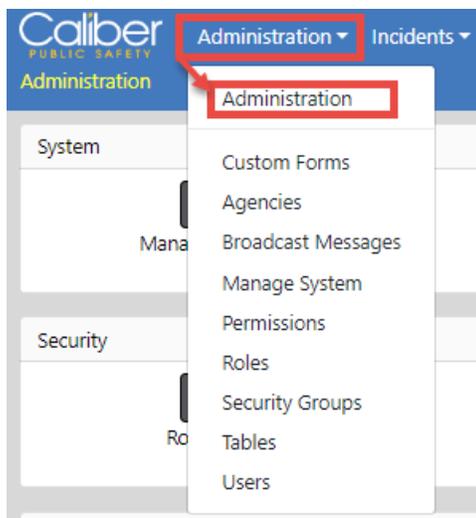
**Note:** For more information on the **Training Video Library**, refer to the *Online RMS User Guide*.

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

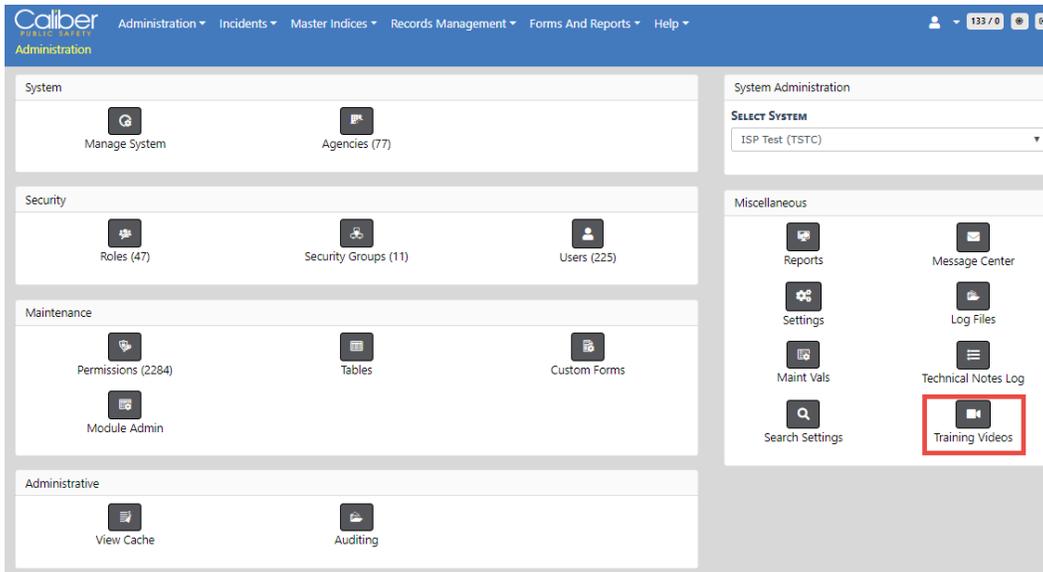
## Access Training Videos

Follow these steps to access the **Training Videos** admin link:

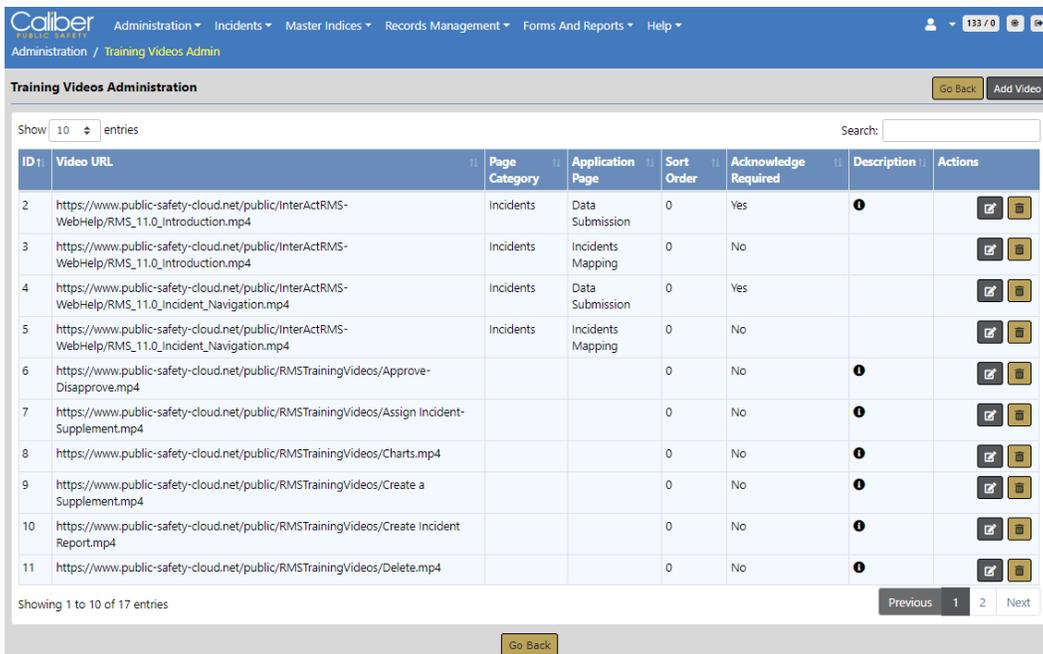
1. Click on the **Administration** label on the top menu bar then click **Administration** again.



2. Click on **Training Videos** under *Miscellaneous*.



3. The *Training Videos Administration* grid appears.



## Search Training Videos

Follow these steps to search **Training Videos** in Online RMS:

1. Access *Training Videos Administration*. For instructions, refer to “Access Training Videos” on page 166.
2. Click in the **Search** text box and enter a word or phrase to display results that match your entered text.

The screenshot shows the 'Training Videos Administration' page. At the top, there is a navigation menu with 'Administration / Training Videos Admin'. Below the menu, there is a search bar and a 'Go Back' button. The main content area displays a table with 11 entries. The table has columns for ID, Video URL, Page Category, Application Page, Sort Order, Acknowledge Required, Description, and Actions. The first 10 entries are visible, and the 11th entry is partially visible. The table shows various video URLs and their corresponding categories and application pages.

ID	Video URL	Page Category	Application Page	Sort Order	Acknowledge Required	Description	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes		
3	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		
4	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Incident_Navigation.mp4	Incidents	Data Submission	0	Yes		
5	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Incident_Navigation.mp4	Incidents	Incidents Mapping	0	No		
6	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Approve-Disapprove.mp4			0	No		
7	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Assign Incident-Supplement.mp4			0	No		
8	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Charts.mp4			0	No		
9	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Create a Supplement.mp4			0	No		
10	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Create Incident Report.mp4			0	No		
11	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Delete.mp4			0	No		

Showing 1 to 10 of 17 entries

The screenshot shows the 'Training Videos Administration' page with a search filter applied. The search bar at the top right contains the text 'data'. The table below shows only 2 entries that match the search criteria. The search bar is highlighted with a red box, and a red arrow points to the search results.

ID	Video URL	Page Category	Application Page	Sort Order	Acknowledge Required	Description	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes		
4	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Incident_Navigation.mp4	Incidents	Data Submission	0	Yes		

Showing 1 to 2 of 2 entries (filtered from 17 total entries)

## Add Training Videos

Follow these steps to add **Training Videos** to Online RMS:

**Note:** Contact Caliber Public Safety for video uploads.

1. Access *Training Videos Administration*. For instructions, refer to “Access Training Videos” on page 166.
2. Optionally, search for specific training videos to ensure the video you want to add doesn't already exist. For instruction, refer to “Search Training Videos” on page 167.
3. Click on the **Add Video** button if the video does not already exist.

Administration / Training Videos Admin

Training Videos Administration Go Back Add Video

Show 10 entries Search:

ID	Video URL	Page Category	Application Page	Sort Order	Acknowledge Required	Description	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes		
3	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		

4. The *Training Video* dialog box appears.

**Training Video**

**ID**

**VIDEO URL**

**VIDEO FILE TYPE**

**APPLICATION PAGE**

**VIDEO DESCRIPTION**

**ACKNOWLEDGE REQUIRED**  **SORT ORDER**

5. Complete the following fields in the dialog box:

**ID**

The ID is read-only. This number uniquely identifies the video and is generated automatically when you click the **Save** button.

**Video URL**

The URL to the video file. Contact Caliber Public Safety to add videos.

**Video File Type**

Online RMS supports only MP4 files at this time.

## Application Page

Select the appropriate **Application Page** from the drop-down list provided.

**APPLICATION PAGE**

Data Submission
-Select-
Administration Agencies
Administration Landing
Administration Users
<b>Data Submission</b>
Forms and Reports
Home Page
Incident Names
Incident Narratives
Incident Offenses
Incidents Approval
Incidents Create
Incidents Header
Incidents Landing
Incidents Mapping
Incidents SmartSearch
Incidents Status
Incidents Summary
Master Indexes

## Video Description

Enter a description for the video.

## Acknowledge Required

Keep the box checked to require users to acknowledge having watched the video. The video continues to pop up automatically each time users log into Online RMS and access a page to which the video is associated until they acknowledge having watched it. The date and time watched by the user is saved to the database on videos that are required.

Uncheck the box if users are not required to acknowledge having watched the video.

## Sort Order

The Sort Order defaults to 0. The Sort Order is used if you have multiple videos that you want to appear on the same page in a particular order.

For example:

If you want two videos to show on the Home Page, you associate each video to the Home Page, then assign a Sort Order to each video: Video 1 could be Sort Order = 0 and Video 2 could be Sort Order = 1.

If the Sort Order is 0 on all videos, then the videos sort in the order you added the videos.

6. Click **Save**.

# Edit Training Video

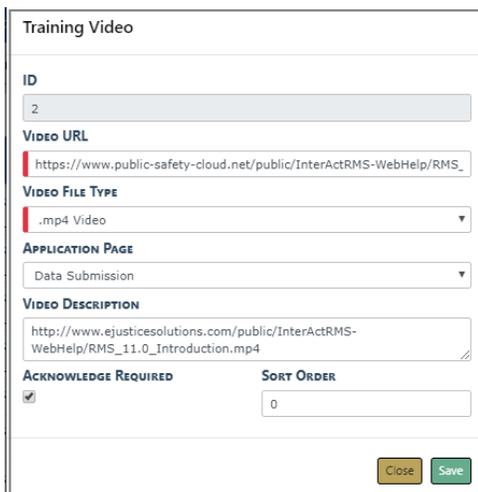
Follow these steps to add **Training Videos** to Online RMS:

1. Access *Training Videos Administration*. For instructions, refer to “Access Training Videos” on page 166.
2. Optionally, search for specific training videos to ensure the video you want to edit. For instruction, refer to “Search Training Videos” on page 167.
3. Click on the **Edit icon**  on the video you want to update.



ID	Video URL	Page Category	Application Page	Sort Order	Acknowledge Required	Description	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes		 
3	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		 

4. The *Training Video* dialog box appears.



**Training Video**

ID: 2

Video URL: https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS\_

Video File Type: .mp4 Video

Application Page: Data Submission

Video Description: http://www.ejusticesolutions.com/public/InterActRMS-WebHelp/RMS\_11.0\_Introduction.mp4

Acknowledge Required:

Sort Order: 0

Close Save

5. Update the values in the fields as needed:

### ID

The ID is read-only. This number uniquely identifies the video and is generated automatically when you click the Save button.

### Video URL

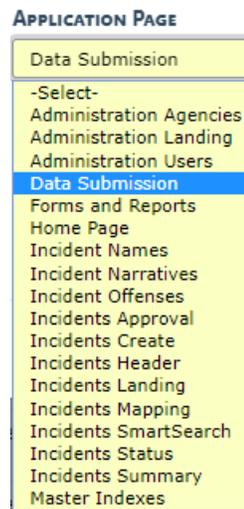
The URL to the video file. Contact Caliber Public Safety to add videos.

## Video File Type

Online RMS supports only MP4 files at this time.

## Application Page

Select the appropriate **Application Page** from the drop-down list provided.



## Video Description

Enter a description for the video.

## Acknowledge Required

Keep the box checked to require users to acknowledge having watched the video. The video continues to pop-up automatically each time you log into Online RMS and access a page to which the video is associated until you acknowledge having watched it. The date and time watched by the user is saved to the database on videos that are required.

Uncheck the box if users are not required to acknowledge having watched the video.

## Sort Order

Enter the Sort Order if you want to sort the video list in a particular order. It sorts by ID by default.

6. Click **Save**.

## Delete Training Videos

Follow these steps to delete **Training Videos** from Online RMS:

1. Access *Training Videos Administration*. For instructions, refer to “Access Training Videos” on page 166.
2. Optionally, search for specific training videos to ensure the video you want to add doesn't already exist. For instruction, refer to “Search Training Videos” on page 167.
3. Click the **Delete icon**  on the video you want to remove.



The screenshot shows the 'Training Videos Administration' interface. At the top right, there are 'Go Back' and 'Add Video' buttons. Below the header, there is a 'Show' dropdown set to '10' and 'entries', and a search box. The main content is a table with the following columns: ID, Video URL, Page Category, Application Page, Sort Order, Acknowledge Required, Description, and Actions. Two rows of video data are visible. The delete icon (trash can) in the Actions column of the first row is highlighted with a red box.

ID	Video URL	Page Category	Application Page	Sort Order	Acknowledge Required	Description	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes		 
3	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		 

4. Click **Yes** to confirm deletion, or **No** to return to the previous screen without deleting.



# Chapter 13. Permissions Module

This module provides access to features used by your agency/schema to comprise the various roles necessary for daily operations. Access within this module varies greatly, depending upon the users administrative roles/permissions.

## Permission Categories

**Permission Categories** are assigned certain Roles, and Roles are assigned specific Permissions.

Click the **Permissions** icon on the *Administration Home* page to open the *Permission Categories* page. Alternatively, click the **Permissions** option on the **Administration** menu.

The screenshot shows a web interface for 'Permission Categories'. At the top right is a 'Go Back' button. Below it, there is a 'Show 10 entries' dropdown and a search box. The main content is a table with two columns: 'Category' and 'Actions'. The 'Category' column lists various administrative tasks, and the 'Actions' column contains eye icons. At the bottom, there is a pagination bar showing 'Showing 1 to 10 of 388 entries' and a set of page numbers from 1 to 39.

Category	Actions
Administration - Activate Users in Agency	
Administration - Activate Users in Organization	
Administration - Activate Users in System	
Administration - Add County	
Administration - Add Supervised Agencies to User	
Administration - Agency Admin	
Administration - Agency Civil Process Admin	
Administration - Agency Field Arrest Admin	
Administration - Agency Officer Daily Admin	
Administration - Agency Setup Wizard	

This page lists the various **Permissions Categories** that are available to your agency/schema. While Permissions Categories are managed by Caliber Public Safety personnel, agency personnel with proper permissions can view the available categories and details. **Permissions Categories** are listed in alphabetical order.

To view the Roles and Permission details of a particular Category, either click the View icon in the **Actions** column or on the Category link to open the *Permission Category*

*Details* page. With appropriate permissions you can also add one or more roles directly to a Permission Category.

Category	Actions
Administration - Activate Users in Agency	
Administration - Activate Users in Organization	
Administration - Activate Users in System	
Administration - Add County	
Administration - Add Supervised Agencies to User	
Administration - Agency Admin	
Administration - Agency Civil Process Admin	
Administration - Agency Field Arrest Admin	
Administration - Agency Officer Daily Admin	
Administration - Agency Setup Wizard	

Showing 1 to 10 of 388 entries

**Note:** See "Permission Categories Details" below for more information.

## Permission Categories Details

To view the Roles and Permission details associated with a particular **Permission Category**, locate the category to view, then either click the view icon in the **Actions** column or the Category link to open the *Permission Category Details*.

**Roles** 13 Active Users

Role
CFS
DISPATCH
DBA
OFFICER
CID_USER

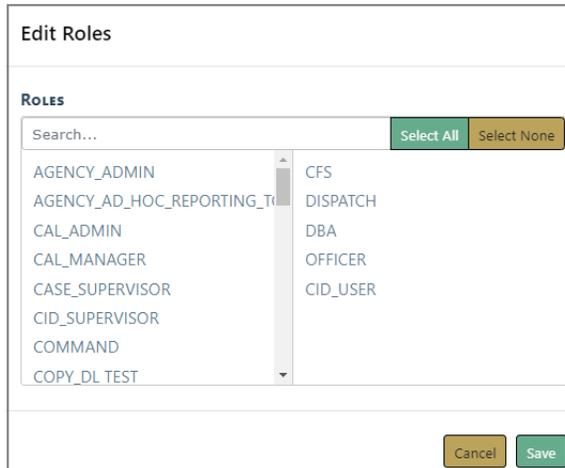
**Permissions**

Permission Description	Dispatch To
Calls For Service - Create an incident from a call	createIncidentFromDispatch
Incidents - Get Header Fields for Incident Creation AJAX	getCreationFields
Ajax call for validating a report # client side	validateReportNumber

From this page, you can:

- View the Roles associated with this **Permission Category**.
- View a list of permissions that are associated with the Roles.
- Add one or more Roles directly to a permission category.

Click the **Edit Role** button then select one or more Roles.



- View a list of active users that have one or more of the Roles listed.

Click the **Active Users** link to view the active user list.



**Note:** For more information on Roles, see “Roles” on page 77 .



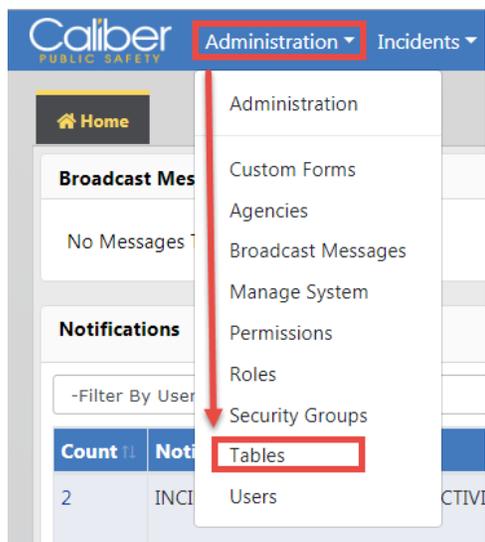
# Chapter 14. Tables

Code Tables and RMS Tables are used throughout the Online RMS application by users with proper permissions and are maintained from the Tables page. Additional System Tables are available to Caliber Public Safety personnel only and are not available for general use.

## Access Tables

Click the **Tables** icon on the *Administration Home* page to access the *Tables* page. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.

Alternatively, click on the **Administration** option on the top navigation bar to display the drop-down menu, then click **Tables**.



The **Tables** page opens with two tabs: *Code Tables* and *RMS Tables*.

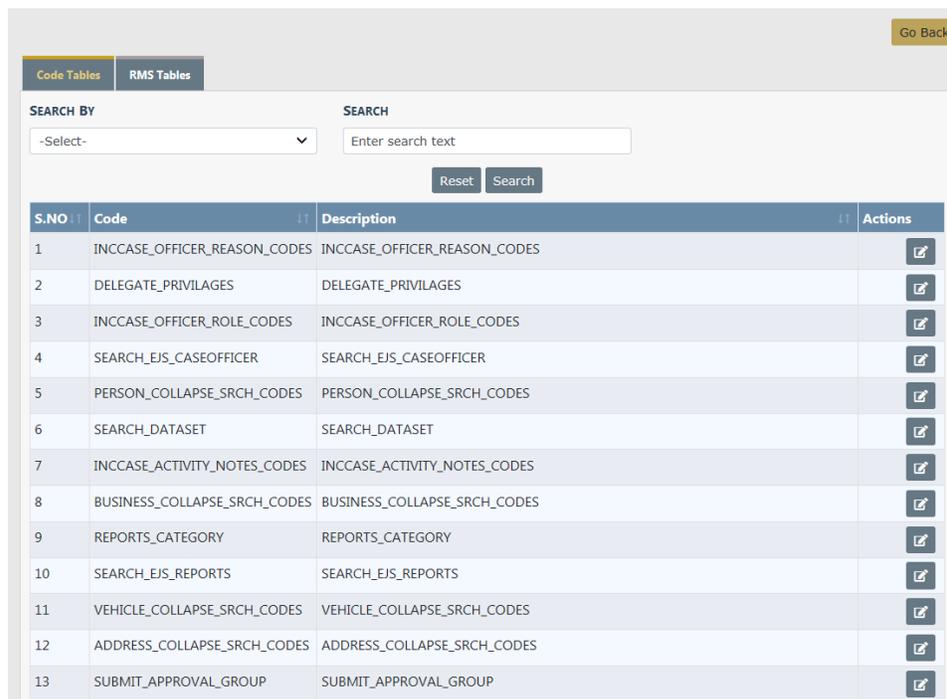
**Note:** A *System Tables* tab is also available to Caliber Public Safety personnel only, for agency setup purposes.



- For information on **Code Tables** "Code Tables" below.
- For information on **RMS Tables** tab is the second tab. "RMS Tables" on page 184.

## Code Tables

The **Code Tables** tab is open upon access of the *Tables* page.



S.NO	Code	Description	Actions
1	INCCASE_OFFICER_REASON_CODES	INCCASE_OFFICER_REASON_CODES	
2	DELEGATE_PRIVILAGES	DELEGATE_PRIVILAGES	
3	INCCASE_OFFICER_ROLE_CODES	INCCASE_OFFICER_ROLE_CODES	
4	SEARCH_EJS_CASEOFFICER	SEARCH_EJS_CASEOFFICER	
5	PERSON_COLLAPSE_SRCH_CODES	PERSON_COLLAPSE_SRCH_CODES	
6	SEARCH_DATASET	SEARCH_DATASET	
7	INCCASE_ACTIVITY_NOTES_CODES	INCCASE_ACTIVITY_NOTES_CODES	
8	BUSINESS_COLLAPSE_SRCH_CODES	BUSINESS_COLLAPSE_SRCH_CODES	
9	REPORTS_CATEGORY	REPORTS_CATEGORY	
10	SEARCH_EJS_REPORTS	SEARCH_EJS_REPORTS	
11	VEHICLE_COLLAPSE_SRCH_CODES	VEHICLE_COLLAPSE_SRCH_CODES	
12	ADDRESS_COLLAPSE_SRCH_CODES	ADDRESS_COLLAPSE_SRCH_CODES	
13	SUBMIT_APPROVAL_GROUP	SUBMIT_APPROVAL_GROUP	

The **Code Tables** tab displays a list of code tables that RMS uses to populate Lists of Values (LOV), or pick lists.

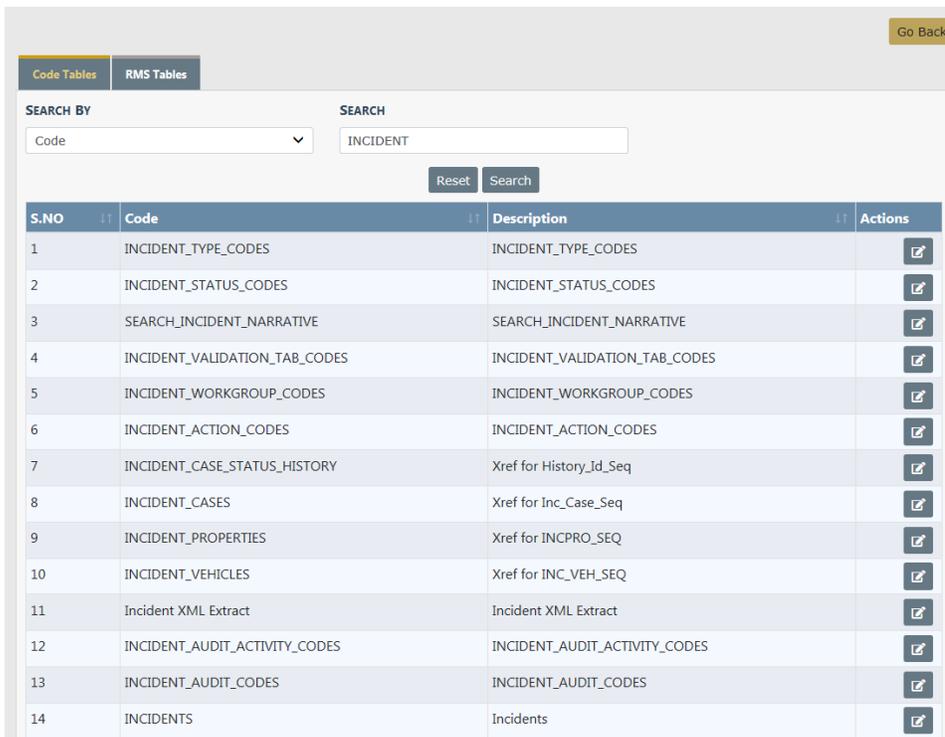
From this tab, administrative users with the appropriate roles/permissions can perform the following tasks:

- Search existing code tables. "Search Code Tables" on the facing page for instructions.
- Edit a code in a code table. For more information, refer to "Edit a Code Table" on the facing page for instructions.

## Search Code Tables

Use the following procedure to search the **Code Tables**.

1. Click  in the **Search By** field.
2. Select from the drop-down. (Available options include: Code, Description, and Table Name.)
3. Click in the **Search** text field and type in a keyword.
4. Click the **Search** button to redisplay the table as shown below for a search for *codes* with the key word *INCIDENT*.



S.NO	Code	Description	Actions
1	INCIDENT_TYPE_CODES	INCIDENT_TYPE_CODES	
2	INCIDENT_STATUS_CODES	INCIDENT_STATUS_CODES	
3	SEARCH_INCIDENT_NARRATIVE	SEARCH_INCIDENT_NARRATIVE	
4	INCIDENT_VALIDATION_TAB_CODES	INCIDENT_VALIDATION_TAB_CODES	
5	INCIDENT_WORKGROUP_CODES	INCIDENT_WORKGROUP_CODES	
6	INCIDENT_ACTION_CODES	INCIDENT_ACTION_CODES	
7	INCIDENT_CASE_STATUS_HISTORY	Xref for History_Id_Seq	
8	INCIDENT_CASES	Xref for Inc_Case_Seq	
9	INCIDENT_PROPERTIES	Xref for INCPRO_SEQ	
10	INCIDENT_VEHICLES	Xref for INC_VEH_SEQ	
11	Incident XML Extract	Incident XML Extract	
12	INCIDENT_AUDIT_ACTIVITY_CODES	INCIDENT_AUDIT_ACTIVITY_CODES	
13	INCIDENT_AUDIT_CODES	INCIDENT_AUDIT_CODES	
14	INCIDENTS	Incidents	

Codes containing the keyword display.

5. Navigate to the Next page as needed until you locate the specific code.

## Edit a Code Table

Use the following procedure to edit a code table.

1. Locate the code table on the *Tables* page. Refer to "Code Tables" on page 180 for details.
2. Click  in the **Actions** column to display *Code Table Details*.

[Go Back](#) [Setup Agency Codes](#)

### Code Table Details

CODE	SCREEN PROMPT	SYSTEM REQUIRED
INCIDENT_TYPE_CODES	<input type="text"/>	Y

NOTES

SORT ALPHABETICALLY 
← Hover mouse over question bubble for information about sorting

### Codes

[Add New Code](#)

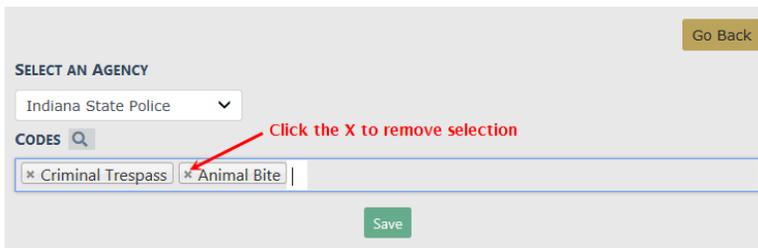
CODE	DESCRIPTION	SCREEN PROMPT	ACTIVE	
ARIES	ARIES Accident Report	<input type="text"/>	<input checked="" type="checkbox"/>	
NOTES		SYSTEM REQUIRED		
<input type="text"/>		N		
ACC	Accident	<input type="text"/>	<input checked="" type="checkbox"/>	
NOTES		SYSTEM REQUIRED		
<input type="text"/>		N		
AFG	Accident FSGI	<input type="text"/>	<input checked="" type="checkbox"/>	
NOTES		SYSTEM REQUIRED		
<input type="text"/>		N		

3. Click the **Add New Code** link to add a code that has been setup, or update existing entries as needed.
4. Click on the **Delete** icon  to remove a code from the list.
5. Click the **Setup Agency Codes** button on the top right of the page to include Agency Codes. **Select an Agency** from the list, then click into the **Codes** field and select one or more codes to add them to the **Codes** field.

[Go Back](#) [Setup Agency Codes](#)

### Code Table Details

CODE	SCREEN PROMPT	SYSTEM REQUIRED
INCIDENT_TYPE_CODES	<input type="text"/>	Y



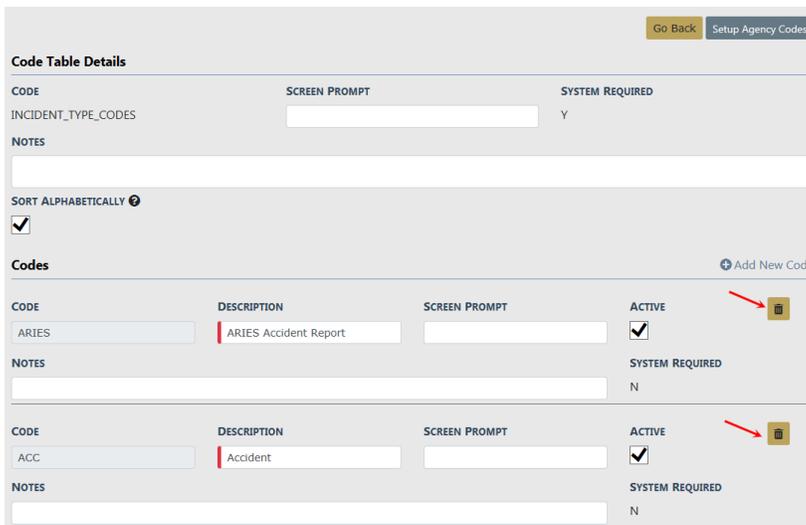
Click **Save**, then click **Go Back** to return to the *Code Table Details* page.

- 6. To delete a code from the code table, refer to "Delete a Code" below.
- 7. Click **Save** at the bottom of the page to save changes and return to the *Tables* page.

## Delete a Code

Use the following procedure to delete a code from a code table.

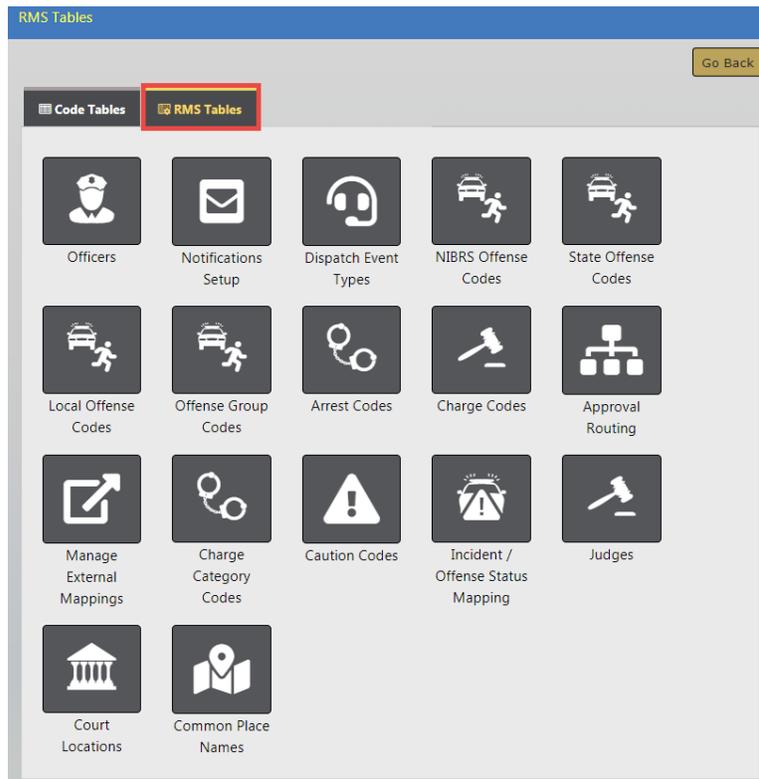
- 1. Locate the code table on the *Tables* page. Refer to "Code Tables" on page 180 for details.
- 2. Click  in the **Actions** column to display the *Edit Code Table*. Refer to "Edit a Code Table" on page 181 for details.
- 3. Locate the code you want to delete then click  to the right of the code.



- 4. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Tables* page.

## RMS Tables

From the *Tables* page, click the **RMS Tables** tab to display the *Tables* page. For details on how to access the Tables page refer to "Access Tables" on page 179.



Each icon on this page provides links to an **RMS Table**.

**Note:** Links are permission-based, so the list varies by user. If you do not see a particular link on the **RMS Tables** tab, it is likely because your user account is not configured to access that item.

- The Officer link displays the *Officers* table. "Officers" on page 186 for information and instructions.
- The Dispatch Event Types link displays the *Dispatch Event Types* table. "Dispatch Event Types" on page 189 for information and instructions.
- The NIBRS Offense Codes link displays the *NIBRS Codes* table. "NIBRS Codes" on page 191 for information and instructions. (National Incident Based Reporting System (NIBRS) is an incident-based reporting system for crimes.)

- The [State Offense Codes](#) link displays the *State Offense Code* table. "State Offense Codes" on page 193 for information and instructions.
- The [Local Offense Codes](#) link displays the *Local Offense Code* table. "Local Offense Codes" on page 196 for information and instructions.
- The [Offense Group Codes](#) link display the *Offense Group Code* table. See "Offense Group" on page 199 for information and instructions.
- The [Arrest Codes](#) link displays the *Arrest Charge Code* table. "Arrest Charge Codes" on page 201 for information and instructions.
- The [Charge Codes](#) link displays the *Charge Code* table. "Charge Codes" on page 204 for information and instructions.
- The [Charge Category Codes](#) link displays the *Charge Category* table. See "Charge Categories" on page 209 for information and instructions.
- The [Caution Codes](#) link displays the *Caution Code* table. See "Caution Codes" on page 211 for information and instructions.
- The [Incident Status / Offense Status Mapping](#) link displays the *Incident Status/Offense Status Mapping* table. See "Incident Status/Offense Status Mapping" on page 218 for information and instructions.
- The [Judges](#) link display the *Judges* table. See "Judges" on page 223 for information and instructions.
- The [Court Locations](#) link displays the *Court Locations* table. See "Court Locations" on page 220 for information and instructions.
- The [Common Place Name](#) link displays the *Common Place Name* table. See "Common Place Names" on page 225 for information and instructions.
- The [Approval Routing](#) link displays the *Approval Route* table. "Approval Routes" on page 230 for information and instructions.
- The [Manage External Mappings](#) link displays the *Mapping Type* table. "Mapping Types" on page 234
- The [Notifications Setup](#) link displays the *Notification Type* table. "Notification Types" on page 227 for information and instructions.

## Officers

From the **RMS Tables** tab of the *Tables* page, click the Officer link to display the *Officers* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.



RMS Tables / Officers

Go Back Add Officer

Show 50 entries Search:

Last Name	First Name	Middle Name	Title	User Id	Badge #	Actions
Admin	County				123	
Avery	Peter (off)	T	Officer		205	
Collins	timmy				997	
Dude	Det			SA_CID	SA_CID	
Evidence2	Employee				654321	
Friday	Joe	A		C_ADMIN	11122	
Gordmanson	Christian (osuper)	Fred			200	
Gordmanson	Christian (osuper)	H			70	
Gordmanson	Christopher	Fred			80	
Gordmanson2	Christian (osuper)				90	
Gumbrell	Terry (cid super)	H	CID Supervisor	STATE_CIDSUP1	10	

### Export Officer List to Excel

You can export the contents of the Officer Table to Excel. Click on the **Export All To Excel** button to download the Excel file to your local machine.

### Search Officers

Use the following procedure to search the *Officer* table.

1. Click in the **Search** text field and type in a keyword.
2. The search results automatically return records where data matches the text you typed in the Search field.

Go Back Add Officer Export All To Excel

Show 50 entries

Search: officer

Last Name	First Name	Middle Name	Title	User Id	Badge #	Actions
Hanover	Jeff		Officer Supervisor	STATE_OSUPER8	96965	
Hedges	Joe		Officer		7049	
Officer	Dispatch				88888	
Officer	Test			OFFICER_TEST	1234	
OfficerTest	TestNewOfficer	New	DeleteMe		123456789	
Sunsonsen	Officer				68249	
TempOfficerLN	TempOfficer				887456985	
TestOfficerLN2	TestOfficer2				654321987741258	
Wright	Greg	QA	SERGEANT-CAPTAIN-WIN	STATE_OFFICER11	9696	

Showing 1 to 9 of 9 entries (filtered from 31 total entries)

Previous 1 Next

Go Back

## Add an Officer

Use the following procedure to add an officer record to the *Officers* table.

1. Click the **Add Officer** button in the upper right corner of the *Officers* table to display an *Officer Information* tab.

Go Back

**Officer Information**

**Officer Information**

FIRST NAME	AGENCY
<input type="text"/>	ANGTESTAGENCY
MIDDLE NAME	BADGE #
<input type="text"/>	<input type="text"/>
LAST NAME	DISPATCH ID
<input type="text"/>	<input type="text"/>
SUFFIX	CAD BADGE
<input type="text"/>	<input type="text"/>
TITLE	JOB STATUS
<input type="text"/>	<input type="checkbox"/> PATROL <input type="checkbox"/> DETECTIVE <input type="checkbox"/> ACTIVE

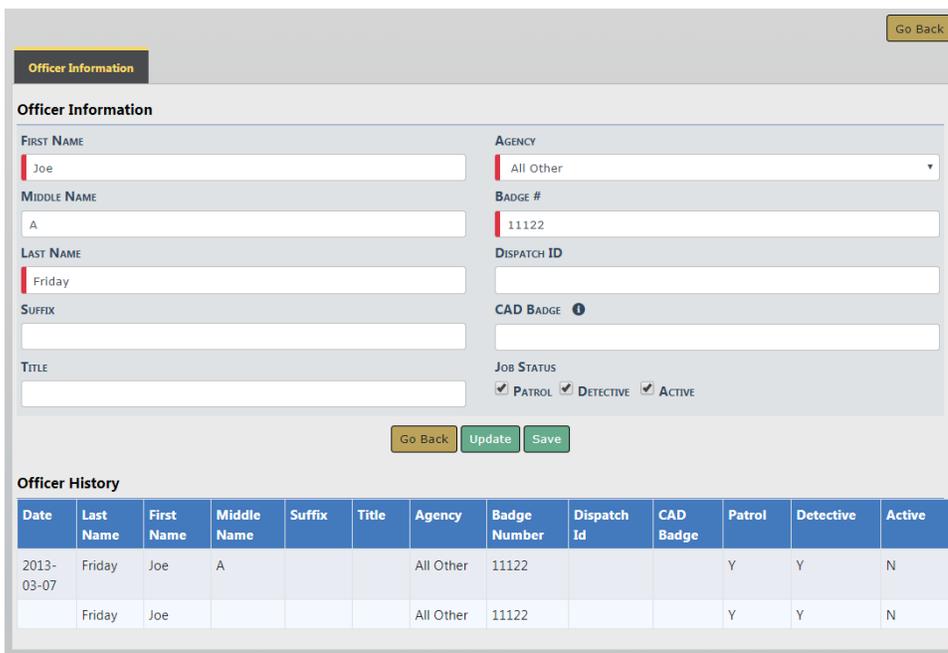
Go Back Save

2. Complete all required fields and optional fields as applicable.
3. Click all **Job Status** check boxes that apply to this officer.
4. Click **Save** to save the record and return to the *Officers* table.

### Edit an Officer

Use the following procedure to edit an officer record in the *Officers* table.

1. Locate the officer record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Officer* page as shown.



**Officer Information**

FIRST NAME: Joe

MIDDLE NAME: A

LAST NAME: Friday

SUFFIX:

TITLE:

AGENCY: All Other

BADGE #: 11122

DISPATCH ID:

CAD BADGE:

Job STATUS:  PATROL  DETECTIVE  ACTIVE

Buttons: Go Back, Update, Save

**Officer History**

Date	Last Name	First Name	Middle Name	Suffix	Title	Agency	Badge Number	Dispatch Id	CAD Badge	Patrol	Detective	Active
2013-03-07	Friday	Joe	A			All Other	11122			Y	Y	N
	Friday	Joe				All Other	11122			Y	Y	N

**Officer History** appears on the bottom portion of the screen showing updates that have occurred to that particular record. Officer History does not appear if updates to the record have not yet occurred.

3. Make changes as needed, clicking **Save** as needed to prevent loss of changes.
4. When changes are complete, click **Update** to save the record and return to the *Officers* table.

### Delete an Officer

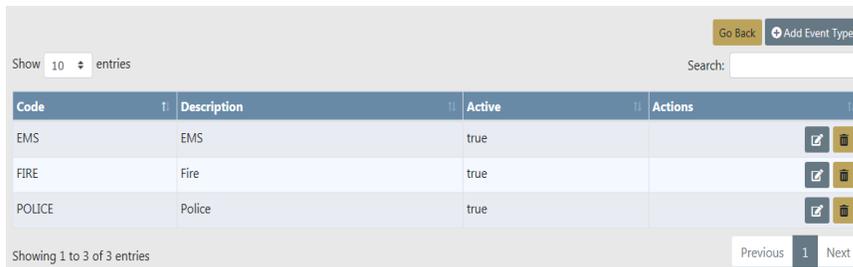
Use the following procedure to delete an officer record from the *Officers* table.

1. Locate the officer record you need to delete from the table.

2. Click  in the **Actions** column in the same row as the record listing to display the confirm deletion prompt.
3. Confirm deletion and return to the *Officer* table.

## Dispatch Event Types

From the **RMS Tables** tab of the *Tables* page, click the Dispatch Event Types link to display the *Dispatch Event Types* table. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

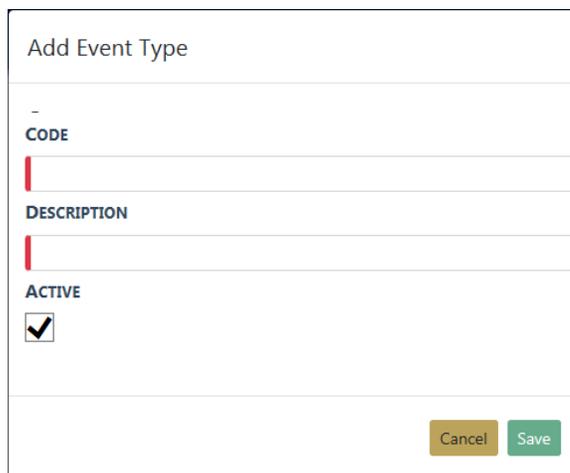


Code	Description	Active	Actions
EMS	EMS	true	 
FIRE	Fire	true	 
POLICE	Police	true	 

### Add a Dispatch Event Type

Use the following procedure to add a dispatch event type record to the *Dispatch Events Types* table.

1. Click the **Add Event Type** button to display an *Add Event Type* prompt as shown.



Add Event Type

---

**CODE**

**DESCRIPTION**

**ACTIVE**

2. Click in the **Code** field and type a code for the new dispatch event type.

3. Click in the **Description** field and type a brief description of the new dispatch event type.
4. Leave the **Active** button checked.
5. Click **Save** to save the record and return to the *Dispatch Events Type* table, or click **Cancel** to return without saving.

### ***Edit a Dispatch Event Type***

Use the following procedure to edit a dispatch event type record in the *Dispatch Event Type* table.

1. Locate the record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Add Event Type* prompt as shown with values in the fields and check box.

Edit Event Type

---

**CODE**

**DESCRIPTION**

**ACTIVE**

3. Make changes as needed, then click **Save** to save the changes, and return to the *Dispatch Event Type* table.

### Delete a Dispatch Event Type

Use the following procedure to delete a dispatch event type record from the *Dispatch Event Types* table.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Dispatch Event Types* table.

### NIBRS Codes

From the **RMS Tables** tab of the *Tables* page, click the NIBRS Codes link to display the *NIBRS Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

NIBRS Codes					Go Back	+ Add NIBRS Code
Show	50	entries	Search: <input type="text"/>			
NIBRS Code ↓	Description	Offense Group	Crime Against	Actions		
90Z-S	All Other Offenses - Victim Types S	B	SOCIETY			
90Z-NON-S	All Other Offenses - Non-Society Victim	B	PERSON			
90Z-ILS	All Other Offenses - Victim Typs - ILS	B	SOCIETY			
90Z-IL	All Other Offenses - Victim Type - IL	B	PERSON			
90Z-GS	All Other Offenses - Victim Types GS	B	SOCIETY			
90Z-GILS	All Other Offenses - Victim Type - GILS	B	SOCIETY			
90Z-GIL	All Other Offenses - Victim Type - GIL	B	SOCIETY			
90Z-G	All Other Offenses - Victim Types G	B	SOCIETY			
90Z-EXCLUSIVE	All Other Offenses - Exclusive on Report	B	SOCIETY			
90Z	All Other Offenses	B	PERSON,SOCIETY			
90J	Trespass of Real Property	B	SOCIETY			
90I	Runaway	B	NOT A CRIME			

### Search NIBRS Codes

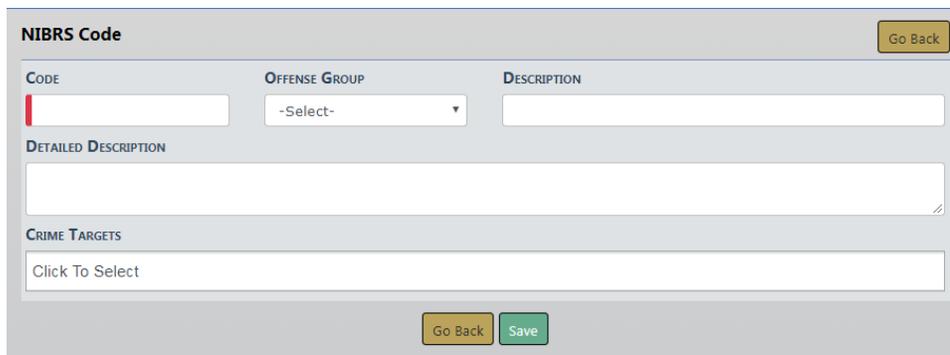
Use the following procedure to search the *NIBRS Codes* table.

1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

### **Add a NIBRS Code**

Use the following procedure to add a NIBRS code to the *NIBRS Code* table.

1. Click the **Add NIBRS Code** button in the upper right corner of the *NIBRS Code* table to display the *Add NIBRS Code* page.



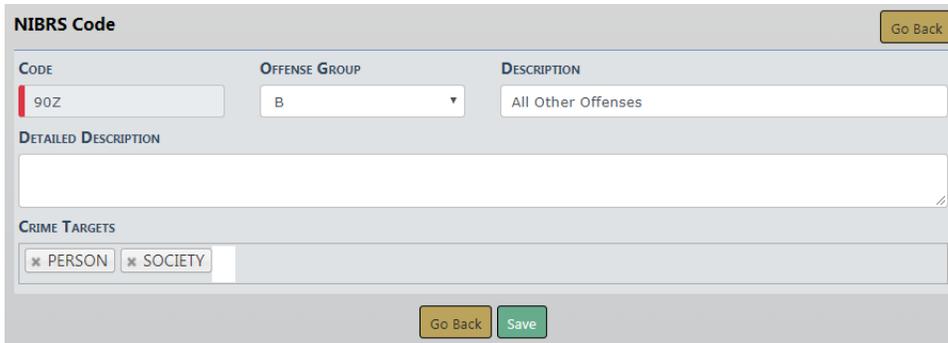
2. Click in the **Code** field (required) and type in a code.
3. Select an **Offense Group**, if applicable.
4. Click in the **Description** field and type a brief description of the code.
5. Click in the **Detailed Description** field and type a long description, if applicable.
6. Click in the **Crime Targets** field and choose one or more options from the list.
7. Click **Save** to save the record and return to the *NIBRS Code* table.

### **Edit a NIBRS Code**

Use the following procedure to edit a NIBRS code to the *NIBRS Code* table.

1. Locate the NIBRS code record you need to edit in the table.

2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Officer* page as shown.



3. Make changes as needed.
4. Click **Save**. A successful save message briefly appears at the top of the page.
5. Click **Go Back** to return to the *Officer* table.

### Delete a NIBRS Code

Use the following procedure to delete a NIBRS code from the *NIBRS Code* table.

1. Locate the NIBRS code record you need to delete from the table.
2. Click  in the **Actions** column.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *NIBRS Code* table.

### State Offense Codes

From the **RMS Tables** tab of the *Tables* page, click the State Offense Codes link to display the *State Offense Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

Go Back Add State Code

Show 10 entries Search:

State Offense Code	NIBRS Code	Description	Status	Actions
10-14-3-29.5	90Z - All Other Offenses	Public Safety- Violation Of Local Travel...	Inactive	
11-8-8-15	90Z - All Other Offenses	CORRECTION- SEX OFFENDER FAIL TO POSSESS...	Active	
11-8-8-17	90Z - All Other Offenses	Correction- Sex Offender Registration Vi...	Active	
11-8-8-18	90Z - All Other Offenses	Correction- Sexual Violent Predator Duty...	Active	
1111555	90Z - All Other Offenses	Test	Active	

### Search State Offense Codes

Use the following procedure to search the *State Offense Codes* table.

1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

### Add a State Offense Code

Use the following procedure to add a state offense code to the *State Offense Codes* table.

1. Click **Add State Code** button in the upper right corner of the *State Offense Codes* table to display an *Add State Offense Code* page as shown below.

State Code Go Back

STATE OFFENSE CODE NIBRS CODE DESCRIPTION

-Select-

DETAILED DESCRIPTION

ACTIVE IBR CODE ARREST CODES

OFFENSE GROUPS

Click To Select

INCIDENT TYPE

Click To Select

Go Back Save

2. Complete all required fields and applicable optional fields.

3. Leave the **Active** button checked.
4. Enter the **IBR Code**.
5. Optionally, select the **Offense Groups**.
6. Optionally, select the **Incident Type** to relate incident types to offenses.

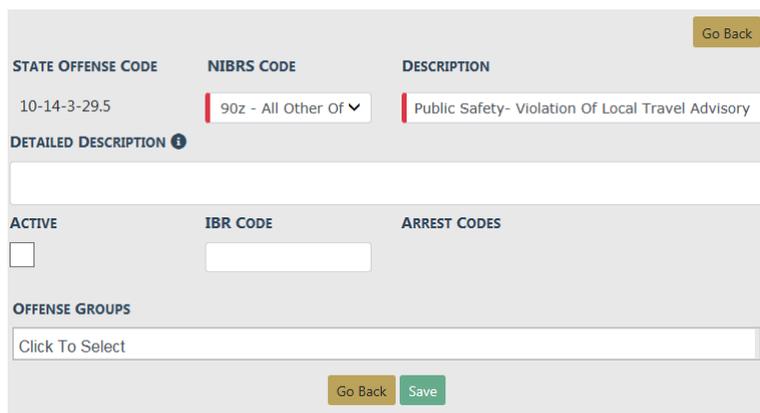
Relating one or more Incident Types to an offense requires at least one related offense on the Incident Report when that Incident Type is added to an Incident Report.

7. Click **Save** to save the record and return to the *State Offense Codes* table.

### **Edit a State Offense Code**

Use the following procedure to edit a state offense code in the *State Offense Codes* table.

1. Locate the state offense code you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit State Offense Code* page as shown.



The screenshot shows the 'Edit State Offense Code' form. At the top right is a 'Go Back' button. The form is divided into several sections: 'STATE OFFENSE CODE' with the value '10-14-3-29.5', 'NIBRS CODE' with a dropdown menu showing '90z - All Other Of', and 'DESCRIPTION' with the text 'Public Safety- Violation Of Local Travel Advisory'. Below these is a 'DETAILED DESCRIPTION' field with an information icon. The next section contains 'ACTIVE' with an unchecked checkbox, 'IBR CODE' with an empty text box, and 'ARREST CODES' with an empty text box. Below that is an 'OFFENSE GROUPS' section with a 'Click To Select' prompt and an empty text box. At the bottom of the form are 'Go Back' and 'Save' buttons.

3. Make changes as needed.
4. When changes are complete, click **Save** to save the record and return to the *State Offense Codes* table.

## Delete a State Offense Code

Use the following procedure to delete a state offense code from the *State Offense Codes* table.

1. Locate the code you need to delete from the table.
2. Click  in the **Actions** column.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *State Offense Codes* table.

## Local Offense Codes

From the **RMS Tables** tab of the *Tables* page, click the [Local Offense Codes](#) link to display the *Local Offense Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

Local Offense	Description	State Offense	NIBRS Code	Status	Actions
0001	Ordinance Violation - Disorderly Conduct			Inactive	 
1111555	Test			Inactive	 
12333	Local Offense - Failure to Register			Active	 
6.2.106.A :M: 1350	Homicide Criminally Negligent Manner	35-42-1-1 M01	09A	Inactive	 
ANG TEST	Ang Test			Active	 
IA-32644	Testing			Inactive	 
REGION 2 LOCAL OFFENSE TEST	Region 2 Local Offense Test			Active	 
TEST LOCAL OFFENSE	Test Offense Description	10-14-3-29.5	90Z	Active	 
TESTING123	Testing123	9-21-8-52A	90Z	Inactive	 

Showing 1 to 9 of 9 entries

Previous 1 Next

## Search Local Offense Codes

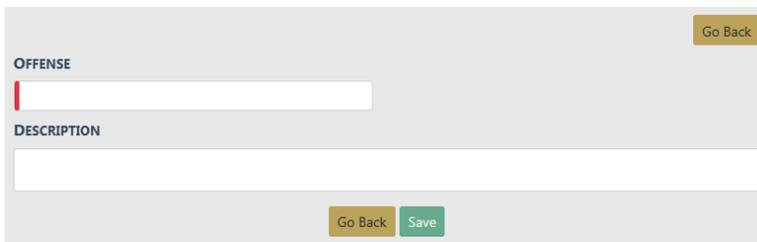
Use the following procedure to search the *Local Offense Codes* table.

1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

### **Add a Local Offense Code**

Use the following procedure to add a local offense code to the *Local Offense Codes* table.

1. Click the **Add Local Offense Code** button to display the *Add Local Offense Code* page as shown below.



2. Complete fields.
3. Click **Save** to save the record and return to the *Local Offense Codes* table.

### **Edit a Local Offense Code**

Use the following procedure to edit a local offense code in the *Local Offense Codes* table.

1. Locate the code you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Local Offense Code* page as shown.

3. Make changes as needed.
4. Click **Save** to save changes and return to the *Local Offense Codes* table.

### Delete a Local Offense Code

Use the following procedure to delete a local offense code from the *Local Offense Codes* table.

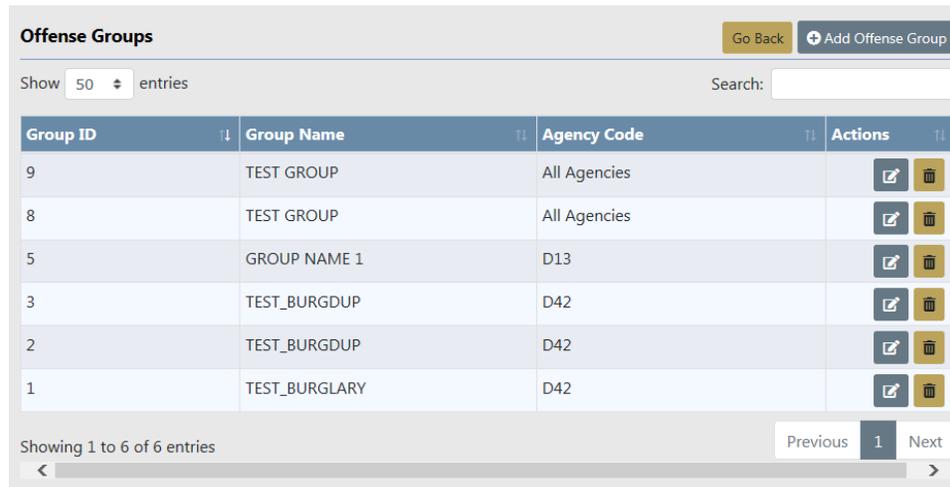
1. Locate the code you need to delete from the table.
2. Click  in the **Actions** column to display a confirmation prompt.

**Note:** A confirmation prompt displays only if the code is not associated with an incident report. Otherwise, the following message displays: This offense cannot be removed because it is associated with one or more incident reports. You may edit this offense and set it to inactive. To inactivate the code, access the *Edit Local Offense Code* page and select **InActive** from the drop-down menu in the **Status** field, then click **Save**.

3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Local Offense Codes* table.

## Offense Group

From the **RMS Tables** tab of the *Tables* page, click the Offense Group Code link to display the *Offense Group Codes* table. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).



Group ID	Group Name	Agency Code	Actions
9	TEST GROUP	All Agencies	 
8	TEST GROUP	All Agencies	 
5	GROUP NAME 1	D13	 
3	TEST_BURGDUP	D42	 
2	TEST_BURGDUP	D42	 
1	TEST_BURGLARY	D42	 

### Search Offense Groups

Use the following procedure to search the *Offense Group* table.

1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

### Add an Offense Group

Use the following procedure to add an offense group to the *Offense Group* table.

1. Click the **Add Offense Group** button to display the *Add Offense Group* page as shown below.

Offense Group

**GROUP NAME**

**AGENCY**

All Agencies ▾

**OFFENSE CODE**



**SELECTED OFFENSES**

Cancel Save

2. Complete fields.
3. Click **Save** to save the record and return to the *Offense Groups* table.

### ***Edit a Local Offense Code***

Use the following procedure to edit an offense group code in the *Offense Groups* table.

1. Locate the code you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Offense Group* page as shown.

Offense Group

**GROUP NAME**  
TEST GROUP

**AGENCY**  
All Agencies

**OFFENSE CODE**

**SELECTED OFFENSES**  
HUMAN SERVICES- FALSE STATEMENT FOR PUBLIC BENEF  
ANG TEST CODE  
Ang Test Off Code

Cancel Save

3. Make changes as needed.
4. Click **Save** to save changes and return to the *Offense Group* table.

### Delete a Local Offense Code

Use the following procedure to delete an offense group from the *Offense Group* table.

1. Locate the code you need to delete from the table.
2. Click  in the **Actions** column.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion.

### Arrest Charge Codes

From the **RMS Tables** tab of the *Tables* page, click the [Arrest Codes](#) link to display the *Arrest Charge Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

Go Back Add Arrest Code

Show 10 entries Search:

Arrest Code	Description	State Offense	Active	Actions
10-14-3-29.5	PUBLIC SAFETY- VIOLATION OF LOCAL TRAVEL ADVISORY DESIGNATIONS	10-14-3-29.5	Y	
11-8-8-15	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15	N	
11-8-8-17	CORRECTION- SEX OFFENDER REGISTRATION VIOLATION	11-8-8-17	Y	
11-8-8-18	CORRECTION- SEXUAL VIOLENT PREDATOR DUTY TO NOTIFY VIOLATION	11-8-8-18	Y	
1111555	Test	1111555	N	
12-32-1-7	HUMAN SERVICES- FALSE STATEMENT FOR PUBLIC BENEFITS	12-32-1-7	Y	
12333	Local Offense - Failure to Register	12333	Y	
13-30-10-5	ENVIRONMENT- UNDERGROUND STORAGE TANK VIOLATIONS	13-30-10-5	Y	
13-30-10-6	ENVIRONMENT- STATE REGULATED WETLAND LAW VIOLATIONS	13-30-10-6	Y	
13-30-2-1	ENVIRONMENT- ENVIRONMENTAL ACT VIOLATIONS	13-30-2-1	Y	

Showing 1 to 10 of 968 entries Previous 1 2 3 4 5 ... 97 Next

## Search Arrest Charge Codes

Use the following procedure to search the *Arrest Charge Codes* table.

1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

## Add an Arrest Charge Code

Use the following procedure to add an arrest charge code to the *Arrest Charge Codes* table.

1. Click the **Add Arrest Code** button in the upper right corner of the *Arrest Charge Codes* table to display an *Add Arrest Charge Code* page as shown below.

2. Complete required fields and applicable optional fields. Any field with a red left-hand border is a required field. You must complete required fields to continue.
3. Select the Warrant Module button to allow this arrest code to be used in the Warrant module. The button is green when selected, or gray when deselected.
4. Click **Save** to save the record and return to the *Arrest Charge Codes* table.

### ***Edit an Arrest Charge Code***

Use the following procedure to edit an arrest charge code in the *Arrest Charge Codes* table.

1. Locate the arrest charge code you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Arrest Charge Code* page as shown.

3. Make changes as needed.
4. Click **Save** to save the record and return to the *Arrest Charge Codes* table.

### Delete an Arrest Charge Code

Use the following procedure to delete an arrest charge code from the *Arrest Charge Codes* table.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column.
3. Click **Yes** to confirm deletion, or click **No** to return to the *Arrest Charge Codes* table without deleting.

### Charge Codes

From the **RMS Tables** tab of the *Tables* page, click the Charge Codes link to display the *Charge Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

Charge Code	Charge Description	Offense Code	Statute	Category	Class	Display	Actions
10-14-3-29.5	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15	11-8-8-15	Misdemeanor	Class 1 Misdemeanor	Y	 
11-8-8-15	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15	11-8-8-15	Misdemeanor	Class 1 Misdemeanor	Y	 
11-8-8-17	CORRECTION- SEX OFFENDER REGISTRATION VIOLATION	11-8-8-17	11-8-8-17	Misdemeanor	Class 1 Misdemeanor	Y	 
11-8-8-18	CORRECTION- SEXUAL VIOLENT PREDATOR DUTY TO NOTIFY VIOLATION	11-8-8-18	11-8-8-18	Misdemeanor	Class 1 Misdemeanor	Y	 
12-32-1-7	HUMAN SERVICES- FALSE STATEMENT FOR PUBLIC BENEFITS	12-32-1-7	12-32-1-7	Misdemeanor	Class 1 Misdemeanor	Y	 

### Search Charge Codes

Use the following procedure to search the *Charge Codes* table.

1. Type a keyword in the **Search** text box in the upper right of the form.
2. Click **Search** to redisplay the table with the search results that match your entered text.

### Add a Charge Code

Use the following procedure to add a charge code to the *Charge Codes* table.

1. Click the **Add Charge Code** button in the upper right of the *Charge Codes* table to display a *Add Charge Code* page as shown below.

2. Complete all required fields and any applicable optional fields.
3. Check all boxes that apply to this charge code.

**Note:** The **Display** check box must be checked for the charge code to display throughout areas of Online RMS where charge codes pulled-in.

4. Click **Save** to save the record and return to the *Charge Codes* table.

### Edit a Charge Code

Use the following procedure to edit a charge code in the *Charge Codes* table.

1. Locate the record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Charge Code* page.
3. Make changes as needed.
4. Click **Save** to save changes and return to the *Charge Code* table.

### **Delete a Charge Code**

Use the following procedure to delete a charge code from the *Charge Code* table. You can delete a charge code when it has not yet been used anywhere in Online RMS.

**Note:** You cannot delete a charge code that has been used in Online RMS. To disable the charge code, uncheck the **Display** check box.

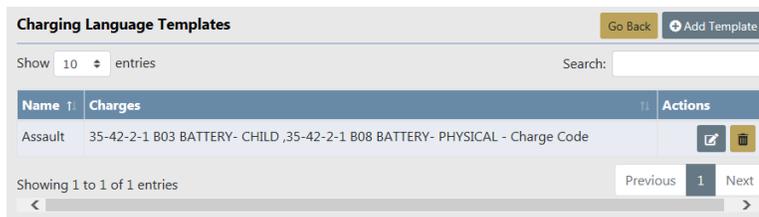
1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing. If the delete icon is not available to you, then you are not able to delete the charge code. To disable the charge code, uncheck the **Display** check box.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Charge Code* table.

### **Manage Charging Language Templates**

Use the following procedure to manage charging language templates.

**Note:** You must have appropriate permissions to perform this function.

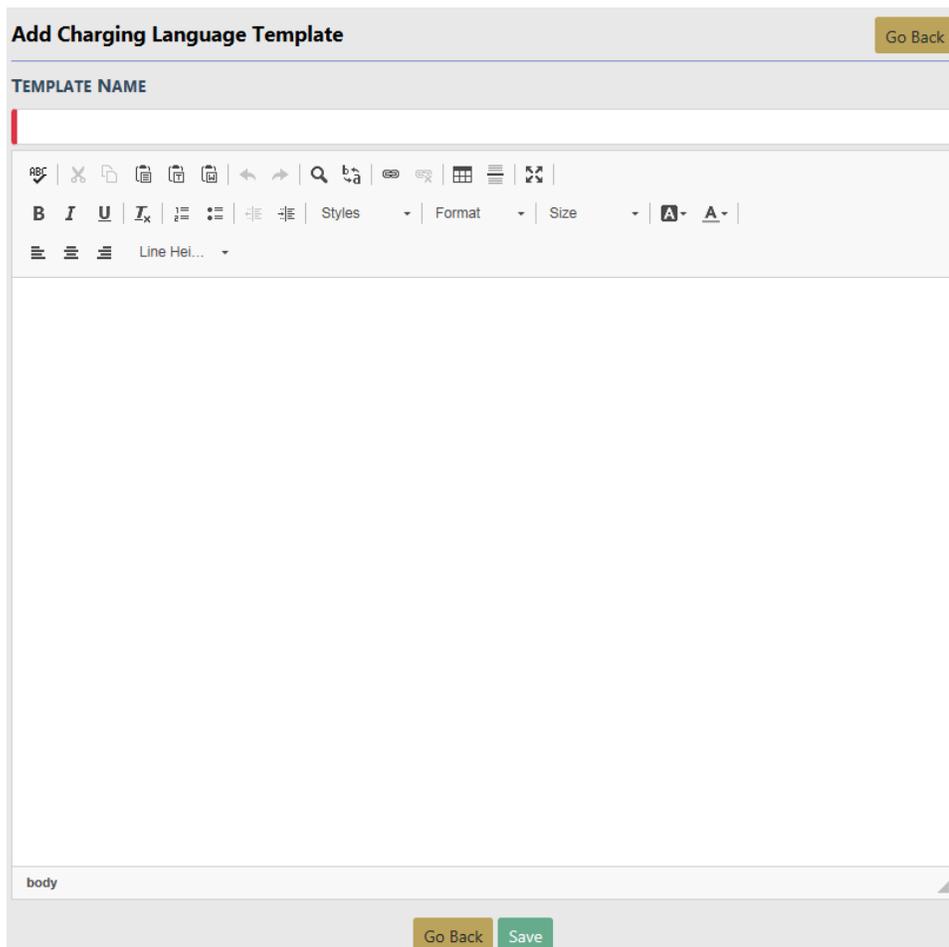
1. Click the **Manage Charging Language Templates** button in the upper right corner of the *Charge Code* table to display a *Charging Language Templates* page as shown below.



The screenshot shows a web interface titled "Charging Language Templates". At the top right, there are "Go Back" and "Add Template" buttons. Below the title, there is a "Show 10 entries" dropdown and a "Search:" input field. A table with three columns is displayed: "Name", "Charges", and "Actions". The table contains one entry: "Assault" with charges "35-42-2-1 B03 BATTERY- CHILD ,35-42-2-1 B08 BATTERY- PHYSICAL - Charge Code". The "Actions" column for this entry has two icons: a pencil (edit) and a trash can (delete). At the bottom of the table, it says "Showing 1 to 1 of 1 entries" and has "Previous", "1", and "Next" navigation buttons.

## Add Template

1. Click the **Add Template** button to open the *Add Charging Language Template* form.



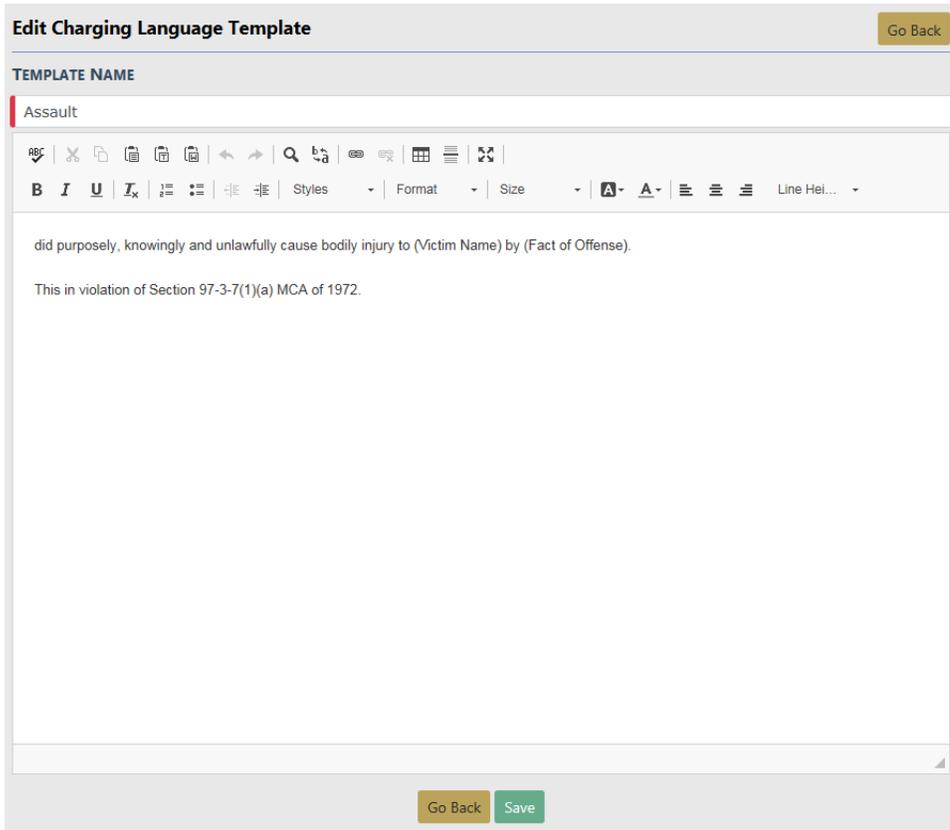
The screenshot shows the "Add Charging Language Template" form. At the top right, there is a "Go Back" button. Below the title, there is a "TEMPLATE NAME" label and a text input field. Below the input field is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, table, table border, table cell, table row, table column, table delete, table merge, table split, table sort, table refresh) and font settings (font color, background color, font size, line height). Below the toolbar is a large text area for entering the template content. At the bottom of the form, there are "Go Back" and "Save" buttons.

2. Enter a unique **Template Name**.
3. Enter text into the body area of the template, optionally using the standard formatting options.
4. Click **Save** to create the template and return to *Charging Language Template*.

## Edit a Charging Language Template

Use the following procedure to edit a Charging Language Template.

1. Locate the record you need to edit.
2. Click  in the **Actions** column to open the *Edit Charging Language Template*.



**Edit Charging Language Template** Go Back

TEMPLATE NAME

Assault

did purposely, knowingly and unlawfully cause bodily injury to (Victim Name) by (Fact of Offense).  
This in violation of Section 97-3-7(1)(a) MCA of 1972.

Go Back Save

3. Make changes as needed.
4. Click **Save** to save changes and return to *Charging Language Templates*.

### Delete a Charging Language Template

Use the following procedure to delete a charging language template.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing. If you do not see the delete icon, then you do not have the ability to delete.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Charging Language Template*.
4. Click **Go Back** to return to the *Charge Codes* table.

## Charge Categories

The **Charge Categories** page allows you to manage the Default Bond Type, Amount, and Active setting for Charge Categories. **Charge Categories** are associated to Charge Codes and display on the *Field Arrest* and *Warrant Charges* pages.

From the **RMS Tables** tab of the *Tables* page, click the Charge Category Codes link to display the *Charge Categories* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

Code	Description	Classes	Active	Actions
C	Civil	Class:Infraction <b>Bond Type:</b> Bond on Companion Case <b>Bond Amount:</b> \$500	Yes	[Edit] [Delete]
DT	Delinquency	Class:Class C Misdemeanor	Yes	[Edit] [Delete]
F	Felony	Class:Class 1 Felony <b>Bond Type:</b> Drivers license <b>Bond Amount:</b> \$666 Class:Class 2 Felony Class:Class 3 Felony <b>Bond Type:</b> Bond on Companion Case <b>Bond Amount:</b> \$150 Class:Felony State Class:Capital Felony Class:Variable Class Felony	Yes	[Edit] [Delete]
M	Misdemeanor	Class:Class A Misdemeanor <b>Bond Type:</b> 25% Surety Bond (Bond Agent) <b>Bond Amount:</b> \$0 Class:Class B Misdemeanor Class:Class C Misdemeanor Class:Variable Class Misdemeanor Class:Class 1 Misdemeanor <b>Bond Type:</b> Drivers license <b>Bond Amount:</b> \$6000	Yes	[Edit] [Delete]

### Add a Charge Category

Use the following procedure to add a charge category to the *Charge Categories* table.

1. Click the **Add Charge Category** button in the upper right corner of the *Charge Categories* table to display a *Add Charge Category* page, and click the Add Class link to add the Category Code.

RMS Tables / Charge Category Codes / Add Charge Category Code

Charge Category Code [Go Back]

CODE: [ ] DESCRIPTION: [ ] ACTIVE:

Code	Description	Bond Type	Bond Amount	Active	Actions
[ ]	[ ]	-Select-	[ ]	<input type="checkbox"/>	[Add Class] [Delete]

[Save]

2. Complete all required fields and any applicable optional fields.
3. Check the **Active** box on the top section of the form if applicable.
4. Check the **Active** box on the Class line items where applicable.
5. Click **Save** to save the record and return to the *Charge Categories* table.

### ***Edit a Charge Category***

Use the following procedure to edit a charge category in the *Charge Categories* table.

1. Locate the record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Charge Category* page.
3. Make changes as needed.
4. Click **Save** to save changes and return to the *Charge Categories* table.

### ***Delete a Charge Category***

Use the following procedure to delete a charge code from the *Charge Categories* table. You can delete a charge category when it has not yet been used anywhere in Online RMS.

**Note:** You cannot delete a charge category that has been used in Online RMS. To disable the charge category, uncheck the **Active** check box.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing. If the delete icon is not available to you, then you are not able to delete the charge category. To disable the charge category, uncheck the **Action** check box.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Charge Categories* table.

## Caution Codes

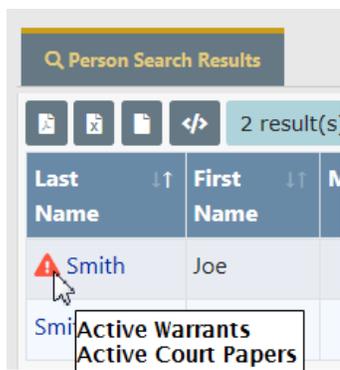
The **Caution Codes** table provides a method to create and maintain a customized set of warnings that can be used on Master Person and Master Address records to inform personnel, with access to Master Indices, of potential dangers or problems specific to those persons and addresses.

### Caution examples

Persons with active warrants, on probation, known to carry firearms, or suicidal tendencies.

An address that has a violent dog or an unusually tall fence.

A red Alert icon appears next to the person's name or address in the *Search Results* window, indicating active Caution Codes or Warrants. Hover your mouse over the Alert icon to view a summary of the all the active alerts, or click on the Alert icon to open details of all active alerts in a pop-up window.



**Person Alerts**

---

**Person Details**

LAST NAME Smith	FIRST NAME Joe	SEX Male	RACE White
ALIASES Bonb Joe Smith(Alias), John Smith(Alias)		CELL PHONE (555)-555-5555	E-MAIL Test@gmail.com
ADDRESS (RESIDENCE) 122 West Elm Street Chicago, IL 60610-0001		HEIGHT 5' 12"	WEIGHT 160
			EYE COLOR Black
INDEX ID 2			

---

**Active Warrants**

<b>Agency:</b> Indiana State Police	<b>Index ID:</b> 65	
<b>Issue Date:</b> 06/18/2014 11:54	<b>Person:</b> Smith, Joe	
<b>Status:</b> Active	<b>Bond Type:</b> 25% Surety Bond (Bond Agent)	
<b>Bond Amount:</b> \$0.00	<b>Reference #:</b> sdfsdc(Docket #)	
<b>Charge:</b> 35-43-1-1A - ARSON- VEHICLE		

---

**Active Court Papers**

CP ID #	Type/Sub Type	Reference #s	Expiration Date	People/Organizations	Actions
53	Subpoena/Civil	Court Case Number: abc			
75	Civil Protection Order/Criminal	Court Case Number: 65165151		Joe Smith: Active	
78	Civil Protection Order/Criminal	Court Case Number: 111111111			
215	Subpoena/Civil	Case Prosecutor Number: IA-34482			

Close

You may also search person or address records by Caution Code and date range. Refer to the *Caliber Public Safety Online RMS User Guide* for details.

Agency administrators with appropriate permissions can create **Caution Codes**, Caution Categories, and assign Caution Category Roles, allowing administration of **Caution Codes** by specified user Roles and Categories. For example, you could have a specialized unit that keeps track of persons on probation, and only agency administrators or users assigned to this Role can add, edit or delete these codes on person records.

From the **RMS Tables** tab of the *Tables* page, click the Caution Codes link to display the *Caution Codes* table. For instructions on accessing the *Tables* page refer to [Access Tables.htm](#).

Code	Description	Category	Category Roles	Active	Actions
ASC	Assaultive/Combative			Yes	
AST	Assaulted officer			Yes	
DEA	Deceased	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
DMMCAUTION	Dana's Caution Code	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
DRG	Known drug user			Yes	
ESC	Escape Risk			Yes	
FSG	FSG VIOLENT caution			Yes	
GNG	Known Gang Member	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
HAIDS	Has AIDS	VIPER	VIPER	Yes	
HEA	Health/Handicapped			Yes	

Two tabs are associated with the **Caution Codes** page: *Caution Codes* and *Caution Category Codes*.

### Caution Codes Tab

The *Caution Codes* tab lists the Category Codes and associated Caution Category Codes and Roles, if any.

**Note:** Caution Category Codes are optional. Refer to the "Caution Category Codes Tab" on page 216 section for more information.

Code	Caution Type	Description	Category	Category Roles	Active	Actions
BOD	Address	Beware of Dog			Yes	
BF	Address	Big Fence			Yes	
PVA	Person	Armed at prior arrest	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
AST	Person	Assaulted officer			Yes	
ASC	Person	Assaultive/Combative			Yes	

Associating a Category Code and Role to a Caution Code allows designated users exclusive access to administer the Category Code on a person record.

Category Code	Description	Category Roles	Active	Actions
GTF	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	 

Only users with these roles can add, edit, or delete this caution code on the person record, while all others users can only view the code.

**Note:** If a Caution Category Role is not associated with a Role, or a Caution Category Code is not associated with a Caution category, then every user has access.

### Add Caution Codes

Use the following procedure to add a caution code to the *Caution Codes* table of the *Caution Codes* table.

1. Click the **Add Caution Code** button in the upper right corner of the *Caution Codes* table to display a *New Caution Code* page.

New Caution Code

---

**CODE**

**DESCRIPTION**

**ACTIVE**

**CAUTION TYPE**

**CATEGORY**

**CAN DUPLICATE**

2. Complete all required fields.
3. Optionally select a **Category** from the list. Categories are defined under the *Caution Codes* table.

**Note:** Refer to the "Caution Category Codes Tab" on page 216 section for more information.

4. Select all buttons that apply to this caution code. Green buttons are active and gray buttons are inactive.
5. Click **Save** to save the record and return to the *Caution Code* table.

**Edit Caution Codes**

Use the following procedure to edit a caution code in the *Caution Code* table.

1. Locate the record you need to edit.
2. Click  in the **Actions** column in the same row as the record to display the *Edit Caution Code* page.

**Edit Caution Code**

---

**CODE**

**DESCRIPTION**

**ACTIVE**

**CAUTION TYPE**

**CATEGORY**

**CAN DUPLICATE**

3. Make changes as needed.
4. Click **Save** to save changes and return to the *Caution Code* table.

**Delete Caution Codes**

Use the following procedure to delete a caution code from the *Caution Code* table.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Caution Code* table.

## Caution Category Codes Tab

**Caution Category Codes** group similar Caution Codes and control who has access to administer the Caution Code by the Category Roles based on User Roles.

**Note:** It is not unusual to create new User Role(s) for Caution Code administration purposes. Refer to "Roles" on page 77 for more information on Roles.

Caution Categories are optional. You can have a few or as many that makes sense for your agency.

Category Code	Description	Category Roles	Active	Actions
GTF	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
VIP	VIPER	VIPER	Yes	

### Add Caution Category Codes

Use the following procedure to add a Caution Category Code to the *Caution Category Codes* tab of the Caution Codes table.

1. Click the **Add Category Code** button in the upper right corner of the *Caution Category Codes* tab to display a *New Category Code* page.

New Category Code

**CODE**  
GIF

**DESCRIPTION**  
Gang Task Force

**ACTIVE**

**ROLES**  
\* CID\_SUPERVISOR \* GANG ALWAYS EDIT AGENCY

Close Save

2. Complete all required fields.
3. The **Active** box is checked by default.
4. Click in the **Roles** field and select one or more from the list to associate to the **Category Code**.
5. Click **Save** to save the record and return to the *Caution Category Codes* tab.

### Edit Caution Category Codes

Use the following procedure to edit a charge code in the *Caution Category Codes* tab of the Caution Codes table.

1. Locate the record you need to edit.
2. Click  in the **Actions** column in the same row as the record to display the *Edit Caution Category Code* page.

Edit Category Code

**CODE**  
VIP

**DESCRIPTION**  
VIPER

**ACTIVE**

**ROLES**  
x VIPER

Close Save

3. Make changes as needed.
4. To remove a Role, click on the **X** on the left of that Role.
5. Click **Save** to save changes and return to the *Caution Category Codes* tab.

### Delete Caution Codes

Use the following procedure to delete a caution code from the *Caution Codes* table.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Caution Category Codes* tab.

## Incident Status/Offense Status Mapping

The **Incident Status / Offense Status Mapping** page allows *Incident Status* codes to be mapped to *Offense Status* codes to prevent mismatches.

During the approval process, if the user sets an *Incident Status* to something other than what has been mapped to an *Offense Status*, an error displays disallowing that selection and prompts them to verify the information and make any necessary changes.

From the **RMS Tables** tab of the *Tables* page, click the Incident Status/Offense Status Mapping link/icon to display the *Mappings* table. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).

Incident Status / Offense Status Mapping			
Incident Code	Incident/Case Status	Offense Status(es)	Actions
00	Open	00: Open/Pending	
02	Cleared by Arrest	02: Cleared by Arrest	
07	Other Enforcement Action	07: Other Enforcement Action 16: Open Pending Destruction Of Property	
10	Cleared Exceptionally By Death Of Offender	10: Cleared Exceptionally By Death of Offender	
11	Cleared Exceptionally - Prosecution Declined, No Complaint Filed	11: CLEARED EXCEPTIONALLY - PROSECUTION DECLINED, NO COMPLAINT FILED	
12	Cleared Exceptionally - Extradition Denied	12: CLEARED EXCEPTIONALLY - EXTRADITION DENIED	
13	Cleared Exceptionally - Victim Refused To Cooperate	13: CLEARED EXCEPTIONALLY - VICTIM REFUSED TO COOPERATE	
14	Cleared Exceptionally - Juvenile No Custody	10: Cleared Exceptionally By Death of Offender 11: CLEARED EXCEPTIONALLY - PROSECUTION DECLINED, NO COMPLAINT FILED 12: CLEARED EXCEPTIONALLY - EXTRADITION DENIED 13: CLEARED EXCEPTIONALLY - VICTIM REFUSED TO COOPERATE 14: CLEARED EXCEPTIONALLY - JUVENILE NO CUSTODY	
22	Closed - Unfounded	05: Closed	
30	Cleared by Citation	07: Other Enforcement Action	

### Add Incident and Offense Status Mapping

1. Click the **Add Incident Mapping** button in the upper right corner of the *Mappings* table to display an *Incident Mapping* page.

Incident Mapping

**INCIDENT STATUS CODE**

01 : Warrant Request Approved

**OFFENSE CODES**

\* 01: Warrant Request \* 07: Other Enforcement Action

Close Save

2. Select an **Incident Code** from the list.
3. Select one or more **Offense Codes**.
4. Click **Save** to save the record and return to the *Mappings* table.

### Edit Incident and Offense Status Mapping

1. Locate the record you need to edit.

- Click  in the **Actions** column in the same row as the record to display the *Incident Mapping* page.

Incident Mapping

---

**INCIDENT STATUS CODE**  
Other Enforcement Action

**OFFENSE CODES**

x 07: Other Enforcement Action x 16: Open Pending Destrucyion Of Property

Close Save

- Make changes as needed.
- Click **Save** to save changes and return to the *Mappings* table.

### Delete Incident and Offense Status Mapping

- Locate the record you need to delete from the table.
- Click  in the **Actions** column in the same row as the record listing.
- If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Mappings* table.

## Court Locations

Agencies using the *Civil Process* and *Warrant* modules have the ability to manage Court Locations. Only agency administrators with proper permissions can add, edit, and delete *Court Locations*. The *Civil* and *Warrant* modules display the *Court Locations* as a list of values when adding court papers and warrants. You can only select a court location that appears in the list of values; as *Court Locations* change, the list of values from which to choose also automatically change.

There are up to three ways to access the *Court Location* table, depending on your permission level:

- From the Main Menu select Administration, Module Admin, then Civil Process. For more information refer to "Civil Process Agency Settings" on page 294.
- From the Main Menu select Administration then Agencies. Find the appropriate agency from the listed agencies then click the edit link next to the agency name. For more information refer to the *Other Tables* section of "Agency Settings" on page 29.

- Click the [Court Locations](#) link on the **RMS Tables** tab of the *Tables* page to display the *Court Location* table. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).

ID	Name	Address	Status	Court	Receiving Agency	Actions
1	Court Location 1 - Alternate Name	101 Webster St. Room #345 Bloomington Colorado 11111-2222	Active	true	true	[Edit] [Delete]
2	DL Supreme Court - Judge Dredd	1776 Lincoln Street 390 Zang Street Denver -	Active	true	true	[Edit] [Delete]
11	Judy's Court -	123 Judge Drive Courtopolis Colorado 12345-	Active	true	true	[Edit] [Delete]
14	A'postrophe's Court -	123 A'postrophe Lane A'postrophe North Carolina 80012-	Active	true	true	[Edit] [Delete]
23	New Court -	New Court Court Courtsville Colorado 11111-	Active	true	true	[Edit] [Delete]

Follow the same procedure to add, edit, and delete *Court Locations*, regardless of which access option you use.

### Add Court Locations

Use the following procedure to add a court location to the *Court Location* table.

1. Click the **Add Court Location** button in the upper right corner of the *Court Locations* table to open a blank entry form.

The form contains the following fields and controls:

- COURT NAME**: Text input field.
- COURT NAME 2**: Text input field.
- ADDRESS 1**: Text input field.
- ADDRESS 2**: Text input field.
- CITY**: Text input field.
- STATE**: Dropdown menu with "-Select-" selected.
- ZIP**: Text input field.
- PHONE**: Text input field.
- JURISDICTION NAME**: Text input field.
- JURISDICTION TYPE**: Dropdown menu with "-Select-" selected.
- COMMENT**: Text input field.
- COURT LOCATION**:
- RECEIVED FROM AGENCY**:
- ACTIVE**:
- AFFIDAVIT FOOTER**:
- Save**: Green button.
- Go Back**: Yellow button in the top right corner.

2. Complete all required fields and optionally complete others.
3. Check all boxes that apply. If you select Affidavit Footer, enter the appropriate information in the additional text box that appears below the buttons.

COURT LOCATION	RECEIVED FROM AGENCY	ACTIVE	AFFIDAVIT FOOTER
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AFFIDAVIT FOOTER TEXT			
<input type="text"/>			
<input type="button" value="Save"/>			

4. Click **Save** to save the record and return to the *Court Location* table.

### Edit Court Locations

Use the following procedure to edit a caution code in the *Court Location* table.

1. Locate the record you need to edit.
2. Click  in the **Actions** column in the same row as the record to open the record for editing.

<input type="button" value="Go Back"/>			
COURT NAME	COURT NAME 2		
<input type="text" value="DL Supreme Court"/>	<input type="text" value="Judge Dredd"/>		
ADDRESS 1	ADDRESS 2		
<input type="text" value="1776 Lincoln Street"/>	<input type="text" value="390 Zang Street"/>		
CITY	STATE		
<input type="text" value="Denver"/>	<input type="text" value="Colorado"/>		
ZIP	PHONE		
<input type="text" value="15406"/>	<input type="text" value="303-672-6745"/>		
JURISDICTION NAME	JURISDICTION TYPE		
<input type="text"/>	<input type="text" value="-Select-"/>		
COMMENT			
<input type="text" value="New court location for Denver"/>			
COURT LOCATION	RECEIVED FROM AGENCY	ACTIVE	AFFIDAVIT FOOTER
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Save"/>			

3. Make changes as needed.
4. Click **Save** to save changes and return to the *Court Location* table.

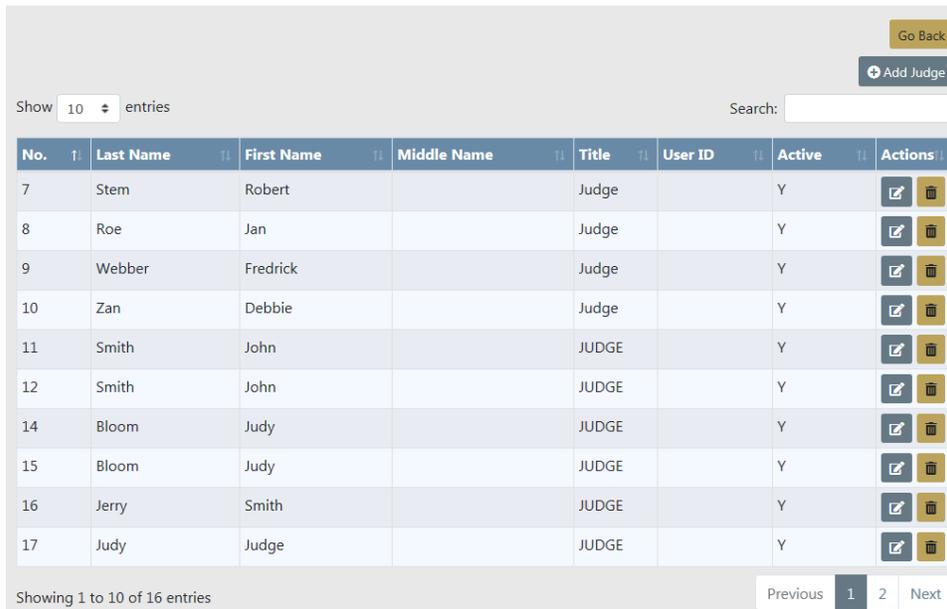
### Delete Court Locations

Use the following procedure to delete a court location from the *Court Location* table.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Court Location* table.

## Judges

To setup judges, click the [Judges](#) link on the **RMS Tables** tab of the *Tables* page. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).



No.	Last Name	First Name	Middle Name	Title	User ID	Active	Actions
7	Stem	Robert		Judge		Y	 
8	Roe	Jan		Judge		Y	 
9	Webber	Fredrick		Judge		Y	 
10	Zan	Debbie		Judge		Y	 
11	Smith	John		JUDGE		Y	 
12	Smith	John		JUDGE		Y	 
14	Bloom	Judy		JUDGE		Y	 
15	Bloom	Judy		JUDGE		Y	 
16	Jerry	Smith		JUDGE		Y	 
17	Judy	Judge		JUDGE		Y	 

### Add Judge

Use the following procedure to add a judge to the *Judges* table.

1. Click the **Add Judge** button in the upper right corner of the *Judges* table to open a blank entry form.

Judge

---

**LAST NAME**

**FIRST NAME**

**MIDDLE NAME**

**TITLE**

**USER ID**

**ACTIVE**

Close Save

2. Complete all required fields and optionally complete others.
3. Click **Save** to save the record and return to the *Judge* table.

### Edit Judges

Use the following procedure to edit a judge in the *Judge* table.

1. Locate the record you need to edit.
2. Click  in the **Actions** column in the same row as the record to open the record for editing.

Judge

---

**LAST NAME**

**FIRST NAME**

**MIDDLE NAME**

**TITLE**

**USER ID**

**ACTIVE**

3. Make changes as needed.
4. Click **Save** to save changes and return to the *Judges* table.

### Delete Judges

Use the following procedure to delete a judge from the *Judges* table.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Judges* table.

## Common Place Names

The **Clery Act** requires that higher education institutions report campus crimes associated with the institution. Many universities have only one address, yet the campus complex could have hundreds of buildings and locations that are either on or off the main campus, are residential facilities, or adjacent to campus; all of which share the same address. Online RMS provides the ability to associate any *Common Place Name* associated with an address and map it to any pre-defined location code.

For example, an officer taking a report for an incident that occurred in a classroom receives the option of choosing from a list of Clery locations like *On Campus* or *Residential Facility*; in this case the officer selects, *On Campus*.

Click the [Common Place Names](#) link on the **RMS Tables** tab of the *Tables* page to display your agency's *Common Place Name* table. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).

Name	Agency	Active	Actions
Outside Store	Indiana State Police	Yes	
hotspot	Indiana State Police	Yes	
ANG TEST	District 42, Versailles	Yes	
Dead strip	District 42, Versailles	Yes	
District 42 test	District 42, Versailles	Yes	
sidewalk	District 35, Evansville	Yes	
Hill	All Other	Yes	
ANG TEST		Yes	
Health Center		Yes	
TEST		Yes	

Showing 1 to 10 of 11 entries

### Add Common Place Name

Use the following procedure to add a common place name to the *Common Place Names* table.

1. Click the **Add Common Place** button in the upper right corner of the *Common Place Names* table to open a blank entry form.

Common Place Name

NAME:  AGENCY:  ACTIVE:

CATEGORIES:

2. Enter the **Name** and select the Agency if applicable.
3. The **Active** box is checked by default.
4. Select one or more **Categories** that apply.

**Note:** Online RMS provides five *Categories* by default: Non-Campus, Off Campus, On Campus, Public Property, Residential Facilities. Contact Caliber Public Safety personnel to assist with updates to this list.

5. Click **Save** to save the record and return to the *Common Place Name* table.

### Edit Common Place Names

Use the following procedure to edit a common place name in the *Common Place Names* table.

1. Locate the record you need to edit.
2. Click  in the **Actions** column in the same row as the record to open the record for editing.
3. Make changes as needed.
4. Click **Save** to save changes and return to the *Common Place Name* table.

### Delete Common Place Names

Use the following procedure to delete a common place name from the *Common Place Name* table.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Common Place Name* table.

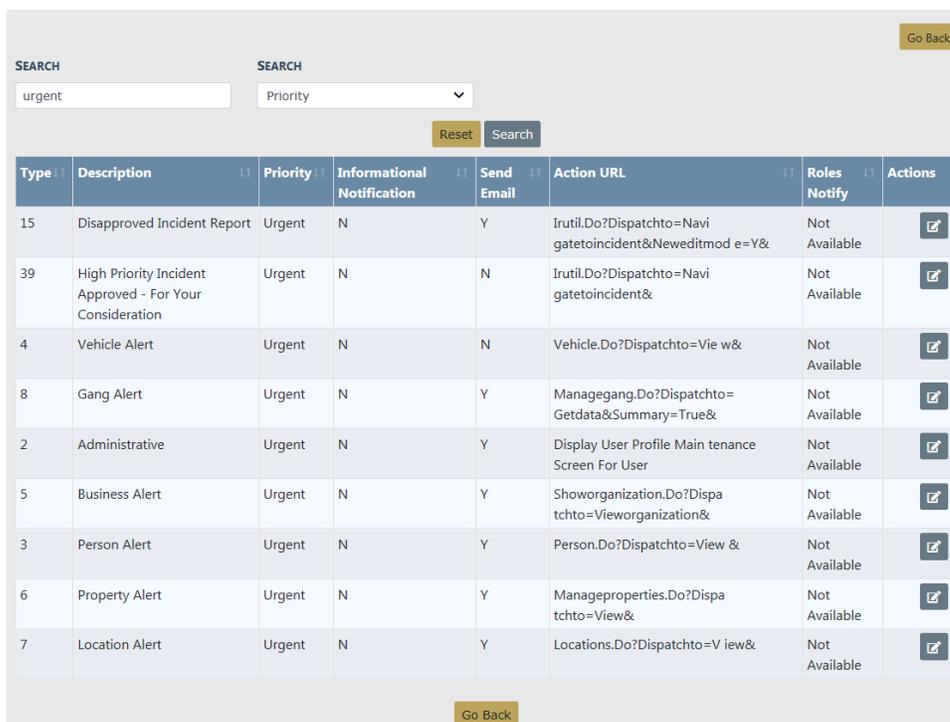
## Notification Types

From the **RMS Tables** tab of the *Tables* page, click the [Notifications Setup](#) link to display the *Notification Type* table. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).

### Search Notification Type

Use the following procedure to search the *Notifications Type* table.

1. Click  in the **Search By** field.
2. Select from the drop-down. (Available options include: Action URL, Description, Email, Information Notification, Priority, Roles, and Type.)
3. Click in the **Search** text field and type in a keyword.
4. Click **Search** to redisplay the table with the search results as shown in the example below.



The screenshot shows a search interface with a text input containing 'urgent' and a dropdown menu set to 'Priority'. Below the search controls are 'Reset' and 'Search' buttons. The search results are displayed in a table with the following columns: Type, Description, Priority, Informational Notification, Send Email, Action URL, Roles Notify, and Actions. The results list various incident reports and alerts, all with a priority of 'Urgent'.

Type	Description	Priority	Informational Notification	Send Email	Action URL	Roles Notify	Actions
15	Disapproved Incident Report	Urgent	N	Y	Irutil.Do?Dispatchto=Navigatetoincident&Neweditmode=Y&	Not Available	
39	High Priority Incident Approved - For Your Consideration	Urgent	N	N	Irutil.Do?Dispatchto=Navigatetoincident&	Not Available	
4	Vehicle Alert	Urgent	N	N	Vehicle.Do?Dispatchto=View&	Not Available	
8	Gang Alert	Urgent	N	Y	Managegang.Do?Dispatchto=Getdata&Summary=True&	Not Available	
2	Administrative	Urgent	N	Y	Display User Profile Maintenance Screen For User	Not Available	
5	Business Alert	Urgent	N	Y	Showorganization.Do?Dispatchto=Vieworganization&	Not Available	
3	Person Alert	Urgent	N	Y	Person.Do?Dispatchto=View &	Not Available	
6	Property Alert	Urgent	N	Y	Manageproperties.Do?Dispatchto=View&	Not Available	
7	Location Alert	Urgent	N	Y	Locations.Do?Dispatchto=View&	Not Available	

The example is the result of a search for *Priority* with the key word *Urgent*.

### Add a Notification Type

Use the following procedure to add a notification type to the *Notification Type* table.

1. Click the **Add Notification Type** button in the upper right corner to display an *Add Notification Type* page as shown below.

The screenshot shows a web form for editing a notification type. It contains several sections:
 

- PRIORITY:** A dropdown menu currently set to 'Urgent'.
- NOTIFICATION AGENCY TYPE:** A dropdown menu currently set to 'Police Agency'.
- DESCRIPTION:** A text input field containing 'HIGH PRIORITY INCIDENT APPROVED - FOR YOUR CONSIDERATION'.
- ACTION URL:** A text input field containing 'IrUtil.do?dispatchto=navigateToIncident&'.
- ROLES:** A list of roles including 'CAL\_ADMIN' and 'COMMAND'.
- NOTIFY COMMENT:** An empty text input field.
- GLOBAL VARIABLES:** Five input fields labeled GLOBAL VARIABLE 1 through 5. GLOBAL VARIABLE 1 contains 'incidentId' and GLOBAL VARIABLE 2 contains 'supplementId'.
- Other Options:** A section with several checkboxes:
  - INFORMATIONAL ONLY:
  - NOTIFY USER:
  - SEND EMAIL:
  - SEND TO ALL AGENCIES:
  - USER DELETE:
  - QUERY ONLY:
  - RESTRICT WORK GROUP:

 At the bottom right, there are two buttons: 'Go Back' (yellow) and 'Update' (green).

2. If needed, click  in the **Priority** field and select another priority.
3. Click  in the **Notification type** field and select a type
4. Complete other fields as applicable.
5. Click to check **Other Options** boxes as needed.
6. Click **Save** to save the record and return to the *Notification Type* table.

### ***Edit a Notification Type***

Use the following procedure to edit a notification type record in the *Notification Types* table.

1. Locate the notification type record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Notification Type* page.
3. Make changes as needed then click **Update**.

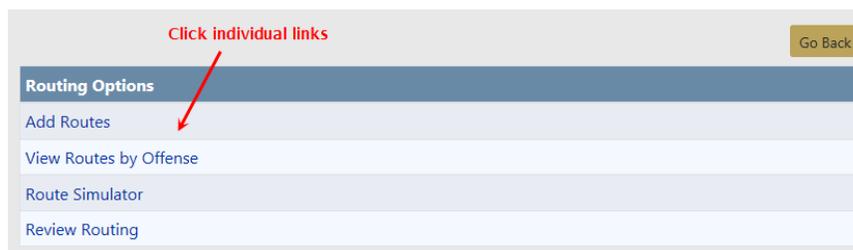
## Delete a Notification Type

Use the following procedure to delete a notification type record from the *Notification Type* table.

1. Locate the notification type record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Notification Types* table.

## Approval Routes

From the **RMS Tables** tab of the *Tables* page, click the [Approval Routing](#) link to display the *Approval Routes* table as shown in the following example:



## Add Routes

Click [Add Routes](#) to open the *Add Approval Route* page as shown.

RMS Tables / Approval Routing / Add Approval Route

**Offenses** Go Back

Select offenses using the autocomplete below, or select a NIBRS code to add all offenses belonging to that NIBRS code.

OFFENSE CODE

NIBRS CODE  
-Select-

SELECTED OFFENSES Leave Blank For All Remove All

**Notification**

NOTIFICATION  
-Select-

DESTINATION AGENCY  
-Same As Source Agency-

USER CANNOT CHANGE DESTINATION AGENCY AT TIME OF APPROVAL

APPLY TO ANY SUPPLEMENT

**Source Agencies**

SOURCE AGENCIES Leave Blank For All

Click To Select

**Statuses**

STATUSES Leave Blank For All

Click To Select

Complete all required fields and as many others as are applicable.

Click **Save** to open the *Route Results* page with the new route.

### ***View Routes by Offense***

Click [View Routes by Offense](#) to open the *Offenses With Routes* page as shown.

[Go Back](#)

Show  entries Search:

Offense Code	Description	NIBRS Code	NIBRS Description	Count
<a href="#">14-21-1-36</a>	NATURAL RESOURCE- POSSESS LOOTED PROPERTY	280	Stolen Property Offenses	1
<a href="#">14-21-2-4</a>	NATURAL RESOURCE- PURCHASE/SALE OF ITEMS REMOVED FROM CEMETERY	280	Stolen Property Offenses	1
<a href="#">14-22-30-1</a>	NATURAL RESOURCE- UNLAWFUL USE OF EXPLOSIVES IN STATE WATERS	520	Weapon Law Violations	1
<a href="#">16-42-19-16</a>	HEALTH- LEGEND DRUG FRAUD	90Z	All Other Offenses	1
<a href="#">22-11-14-6</a>	SAFETY- FIREWORKS REGULATION LAW VIOLATIONS	520	Weapon Law Violations	1
<a href="#">22-11-20-6</a>	SAFETY- POSSESS ANHYDROUS AMMONIA IN UNAPPROVED CONTAINER	520	Weapon Law Violations	1
<a href="#">35-42-1-1 M02</a>	MURDER- ATTEMPTED- FIREARM	09A	Murder and Nonnegligent Manslaughter	1
<a href="#">35-42-1-1 M03</a>	MURDER- ATTEMPTED- KNIFE	09A	Murder and Nonnegligent Manslaughter	1
<a href="#">35-42-1-1 M04</a>	MURDER- ATTEMPTED- NO WEAPON	09A	Murder and Nonnegligent Manslaughter	1
<a href="#">35-42-1-1 M05</a>	MURDER- ATTEMPTED- OTHER	09A	Murder and Nonnegligent Manslaughter	1

Showing 1 to 10 of 353 entries Previous [1](#) [2](#) [3](#) [4](#) [5](#) ... [36](#) Next

Click on a **Offense Code** link to view offense details.

[Go Back](#)

**OFFENSE**  
14-21-1-36 - Natural Resource- Possess Looted Property

Route ID	Notification Type	Statuses	Source Agencies	Destination Agency	Required	Actions
768	INCIDENT APPROVED - FOLLOW UP CASE DECISION NEEDED	(All Statuses)	(All Agencies)	(Same As Source)	No	 

### Route Simulator

Click [Route Simulator](#) to open the *Route Simulator* page as shown.

Parameters

Go Back

**OFFENSE CODE**

**SELECTED OFFENSES**

**ORIGINATING AGENCY**

-Select-

**INCIDENT STATUS**

-All Statuses-

Show Routes

Results

Click into the **Offense Code** field and begin typing to display a list that matches your entered text. Select the appropriate Offense Code from the list and your selection appears in the **Selected Offenses** box automatically. Repeat for additional offenses, if needed.

Complete required fields and others as needed, then click **Show Routes** to display the results at the bottom of the *Route Simulator* page.

Parameters

Go Back

**OFFENSE CODE**

**SELECTED OFFENSES**

14-15-11-11 Natural Resource- Operate A Motorboat While License Suspended

**ORIGINATING AGENCY**

Indiana State Police

**INCIDENT STATUS**

-All Statuses-

Show Routes

Results

Send	Notification	Destination Agency
<input type="checkbox"/>	INCIDENT APPROVED - FOLLOW UP CASE DECISION NEEDED	(Can Modify)

Check the **Send** box and modify the text in the **Destination Agency** field as needed.

## Mapping Types

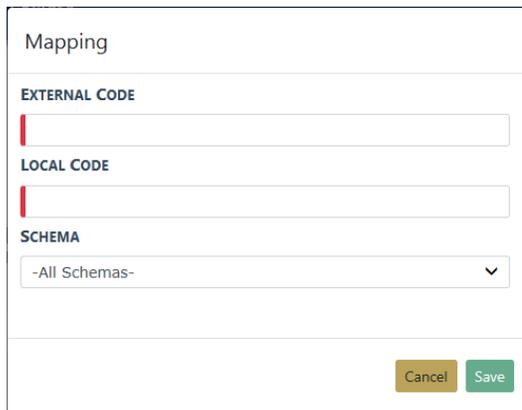
From the **RMS Tables** tab of the *Tables* page, click the Manage External Mappings link to display the *Mapping Types* table as shown in the following example:

Code	Description	Mapping	Actions
MOBILE_ETH	Mobile Ethnicity Codes	4	
MOBILE_EYES	Mobile Eye Codes	25	
MOBILE_HAIR	Mobile Hair Codes	24	
MOBILE_RACE	Mobile Race Codes	24	
MOBILE_SEX	Mobile Sex Codes	9	

Click the **Select** icon in the **Actions** column to the far right of any code listing to open a *Mapping for Type* page as shown in the following example.

Schema Name	External Code	Local Code	Actions
[All Schemas]	BR	BRO	
[All Schemas]	BROWN	BRO	
[All Schemas]	BLK	BLK	
[All Schemas]	BRO	BRO	
[All Schemas]	GRN	GRN	
[All Schemas]	MAR	MAR	
[All Schemas]	PNK	PNK	
[All Schemas]	BLU	BLU	
[All Schemas]	GRY	GRY	
[All Schemas]	HAZ	HAZ	

- To add a mapping, click the **Add Mapping** button to open the **Mapping** window as shown below.



Mapping

EXTERNAL CODE

LOCAL CODE

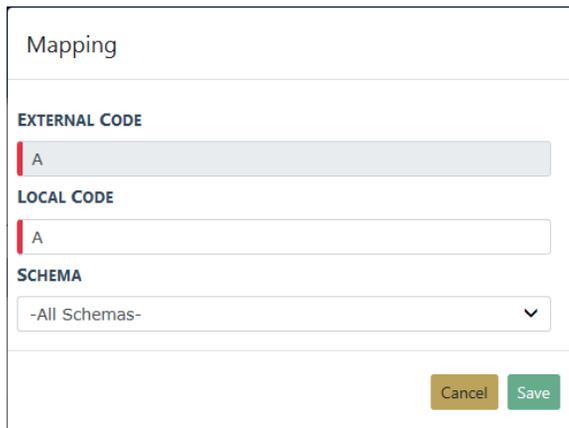
SCHEMA  
-All Schemas- ▼

Cancel Save

Complete required fields and select the **Schema** if applicable.

Click **Save**. Click **OK** to return to the previous page with the new mapping listed at the bottom of the list. (You may need to navigate to another page to see it.)

- To edit a mapping, click  in the **Actions** column to the far right of the listing to open the **Mapping** window as shown below.



Mapping

EXTERNAL CODE

LOCAL CODE

SCHEMA  
-All Schemas- ▼

Cancel Save

Edit the value in the **Local Code** field and select a difference schema as needed.

Click **Save**.



# Chapter 15. Custom Forms

The Custom Forms feature must be enabled by Caliber Public Safety personnel in order for an agency to use it. In addition, only administrative user who have been assigned the appropriate role with the custom forms privileges can create or edit custom forms, and only users who have been assigned roles with the custom forms privileges can use the forms.

- "Set Up Agency" below for more information on enabling the feature.
- "Set Up Roles" on the next page for information on setting up roles with custom form privileges.

**Community Reporting**, a new Online RMS 11.3.2 feature (for minor crime, tips, and other police-related events), leverages the power of Online RMS Custom Forms, allowing agencies to create and manage their publicly available forms.

- See "Community Reporting with Custom Forms" on page 272 for information on Community Reporting.

## Set Up Agency

Caliber Public Safety personnel has the ability to enable the Custom Forms feature for an agency; once it is enabled, agency users with the proper permissions can give appropriate access to other agency users.

The Agency Profile displays available and enabled features in a read-only format.

**Agency Information**

AGENCY INTERNAL CODE: IPSC  
 AGENCY DISPLAY CODE: IPSC  
 AGENCY CODE DISPLAY TEXT: Indiana State Police  
 AGENCY TYPE: Police Agency  
 TIME ZONE: (GMT-05:00) Eastern Time(US and Canada)

ORI NUMBER: 123456789  
 WEBSITE: www.in.gov/isp/  
 PHONE: 317-899-8293  
 FAX: 317-232-3057  
 POINT OF CONTACT:

**External Authentication**

Enabled	Type	Host	Port	Shared Secret	Enable Level	Action
<input type="checkbox"/>	SAFENET	radius-public-safety-cloud.com	1812	*****	USER	Update Delete

**Agency Administrators**

Add User: --Select User-- Add

**Agency User Subscriptions**

Subscription Type	Allocated	Actual	Difference
Full Time	0	129	-129
Part Time	0	1	-1
Reserve	0	1	-1
Full Time Non-Sworn	0	1	-1
Part Time Non-Sworn	0	1	-1
View Only	0	1	-1

**Features**

**SELECTED**

- Arrest Signature Capture
- Field Arrest Property
- Basic CAD
- Custom Forms**
- Calls For Service

**NOT SELECTED**

- Fleet Management
- LEADRS DWI Interface
- LIMS Evidence XML Data Extract
- Lost And Found
- Scheduling

**This section is read-only.**

**Note:** For instructions on accessing the Agency Profile refer to "Manage Agencies" on page 17.

## Set Up Roles

An administrator with the appropriate permissions must set up specific roles with permission to use Custom Forms. It is up to the agency as to which roles are assigned Custom Form privileges.

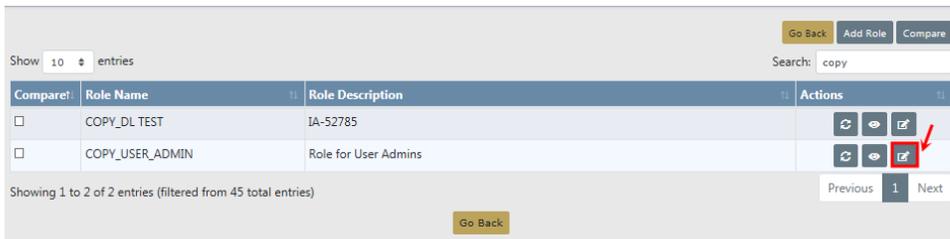
The administrator uses the following procedure to add Custom Forms rights to a role.

1. Access the Roles page and locate the Role you want to give Custom Forms rights to.

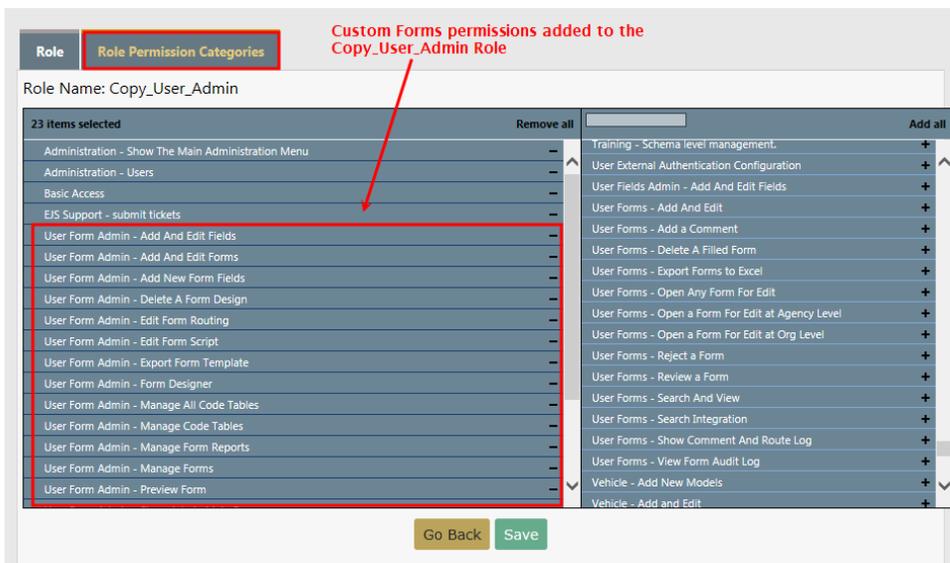
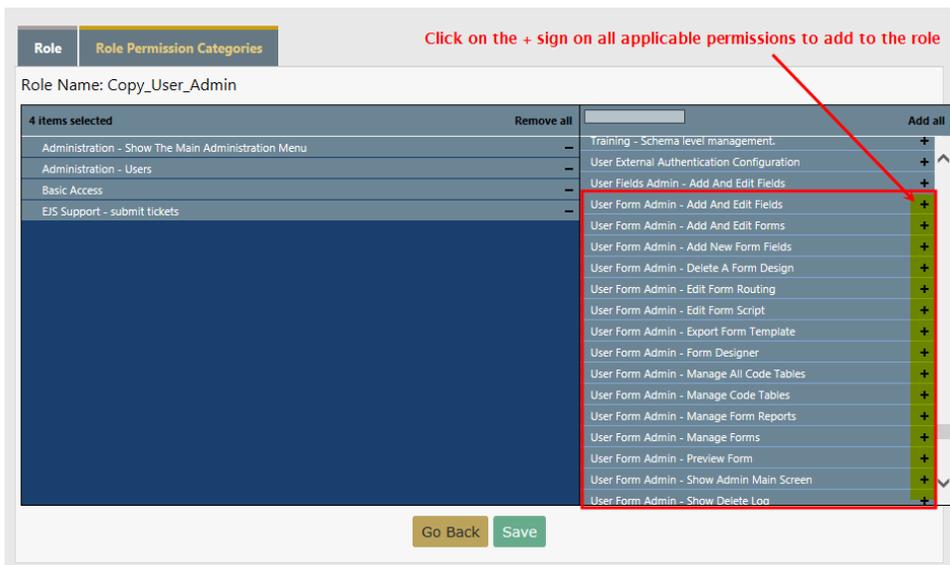
**Note:** For details on accessing the Roles page refer to "Roles" on page 77.

2. Click  in the **Actions** column in the same row as the role to open the *Edit Role* page.

**Note:** Never edit Roles that came with the software; make a copy of the Role then edit the copy as needed. For details on how to copy a Role refer to "Copy Role" on page 83.



3. Click the **Role Permission Categories** tab to open the *Role Permission Categories* page where you can add or remove permissions for the selected role.



- Click **+** to add permissions from the available list on the right, or click **-** to remove permissions from that role on the left.

**Note:** Custom Forms permissions include anything with the prefix *User Form Admin*.

- Click **Save** to save changes.
- When changes are complete for this role, click **Go Back** to return to the *Roles* page.
- Log out or continue working in the Roles module as needed.

## Form Administration

Click the **Administration** label to display the *Administration Home* page. From the *Administration Home* page, click the **Custom Forms** icon to open the *Form Administration* page.

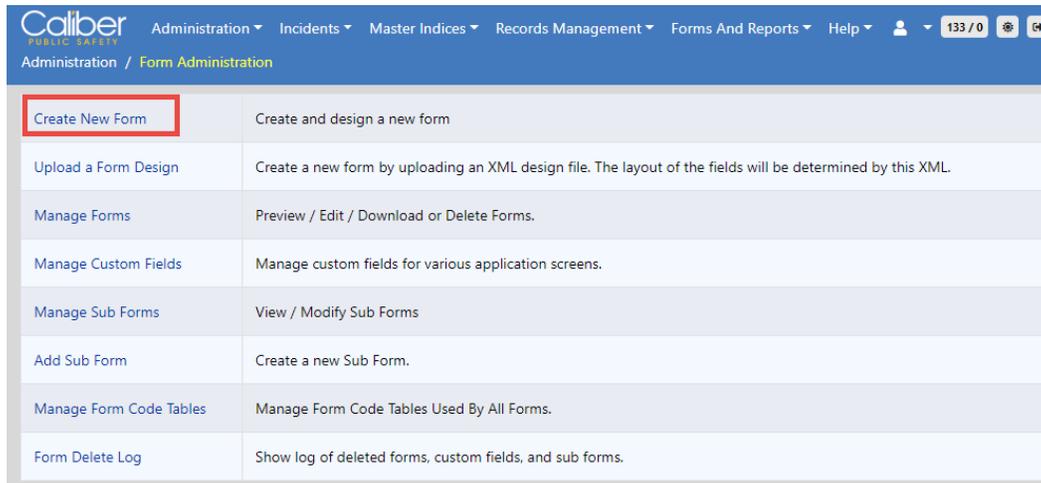
Form Administration	
Create New Form	Create and design a new form
Upload a Form Design	Create a new form by uploading an XML design file. The layout of the fields will be determined by this XML.
Manage Forms	Preview / Edit / Download or Delete Forms.
Manage Custom Fields	Manage custom fields for various application screens.
Manage Sub Forms	View / Modify Sub Forms
Add Sub Form	Create a new Sub Form.
Manage Form Code Tables	Manage Form Code Tables Used By All Forms.
Form Delete Log	Show log of deleted forms, custom fields, and sub forms.

From here, an administrator can create a new custom form, upload a form design, manage forms, manage custom fields, manage sub forms, add sub form, manage code tables, and show the form delete log. When an administrator adds a new form, certain information is required, such as Name, Title, Default Security Level, Officer Entry, Roles, and Form Types. The agency administrator decides how to fill out the required fields. This information may be changed later if the administrator chooses to edit the forms.

### Create (Add) New Form

Use the following procedure to create a new form.

1. From the *Administration - Custom Forms* page, click the Create New Form link to open the *Add Form* page as shown.



The screenshot shows the 'Add Form' page. At the top right are 'Go Back' and 'Save' buttons. A message box states: 'Please start by entering basic form information. Once the form is saved, you will be able to design the forms fields. Note that the form will not be available to users until you publish and activate it.'

The form fields are:

- TITLE**: A required text field (highlighted in yellow).
- DESCRIPTION**: A text area.
- PRINT HEADER**: A text area.
- RESTRICT TO AGENCY**: A dropdown menu with 'Click To Select'.
- DEFAULT SECURITY LEVEL**: A dropdown menu with 'Patrol Supervisor' selected.
- OFFICER ENTRY**: A dropdown menu with '-Select-' selected.
- REVIEW REQUIRED**: A checkbox (unchecked).
- RESTRICT EDIT**: A checkbox (unchecked).
- ROLES**: A dropdown menu with 'Click To Select'.
- FORM TYPES**: A dropdown menu with 'Click To Select'.

A 'Save' button is located at the bottom center of the form.

2. Type a name for the form in the required **Title** field. This should be a name easily related to the form's function because it is what the user sees when searching for a form.

3. Type a brief description of the form in the optional **Description** field, including information for intended users about the forms purpose. The title is visible on the custom form within RMS but not on the printed form.
4. Type a header for the printed form in the optional **Print Header** field. The Printer Header appears only on the printed form.
5. Click in the **Restrict to Agency** field then select one or more agencies to give them the ability to view and edit the form. Usually this field is not used.
6. Click  in the **Default Security Level** field and select to change the security level so that only users with a security level as high or higher than the selected security level can view and edit the form. The person who created the form can always view the form regardless of security level.
7. Click  in the **Officer Entry** field and select the appropriate option. This selection determines whether an officer entry is required, optional, or unspecified when completing the form.
8. Check the **Review Required** box, if appropriate. A notification appears in a yellow box at the top of the *Submit for Review* page requesting a user review a PDF copy of the form before the creator submits it.
9. Check the **Restrict Edit** box, if appropriate.
10. Click in the **Roles** field and select one or more Roles to limit use of this form to those specific Roles.
11. Click in the **Form Types** field and select one or more Form Types to limit this form to specific Form Types.
12. Click **Save** to save.

The designer opens the new form in the Form Editor. "Form Editor" on page 252 for more information.)

The screenshot shows the 'Form Details' tab in the Form Administration interface. The 'PUBLISH STATUS' is 'Not Published' (in red text) and the 'ACTIVE STATUS' is 'Inactive'. The form title is 'Ang Test Custom Form 3'. Other fields include 'DESCRIPTION', 'PRINT HEADER', 'RESTRICT TO AGENCY', 'DEFAULT SECURITY LEVEL' (Patrol Supervisor), 'OFFICER ENTRY' (Officer is Required), 'REVIEW REQUIRED' (checked), 'RESTRICT EDIT' (checked), 'ROLES' (CASE\_SUPERVISOR), 'FORM TYPES' (Vehicles), 'FORM ADMINS', 'SELECTED FORM ADMINS', 'RESTRICT VIEW ACCESS USERS', and 'SELECTED USERS'. A 'Save' button is at the bottom.

**Note:** From the *Administration Home* page, you can click on the Custom Forms icon to open the *Form Administration* page then click the Manage Forms link to open the *Manage Forms* page at any time. From the *Manage Forms* page, you can edit, view, print, and/or delete forms.

The **Publish Status** is listed in red text for forms that are not published.

## Upload Form Design

Use the following procedure to upload a form design.

1. From the *Form Administration* page, click the Upload a Form Design link to open the *Upload Form* page as shown.



2. Click the **Choose File** button in the **Select a File** field to open the *File Explorer* window listing your local directories.
3. Navigate to the folder containing form design documents.
4. Click to select a file then click the **Open** button to pull the path into the **Select a File** field.
5. Click **Upload** to upload the file.

## Manage Forms

Use the following procedure to manage forms.

1. From the *Form Administration* page, click the Manage Forms link to open the *Manage Forms* page as shown.

Form Administration / Manage Forms Go Back

**Forms Created By Your Agency**

Name	Creator	Agencies	Date Created	# of Instances	Publish Status	Active Status	Actions
A New Form	Some Guy	District 42, Versailles	11/10/2014 1235	5	Yes	Active	   
A Simple Custom Form	Sgt. Collins		11/07/2014 0831	4	Yes	Inactive	   
Ang Test Custom Form	Homer Simpson		03/02/2017 0934	22	Yes	Inactive	   
Ang Test Custom Form 3	Homer Simpson	All Agencies	02/26/2019 1058	0	No	Inactive	   
Another Test Form	Derek Livangood	District 42, Versailles	11/05/2014 1224	0	Yes	View Only	   
D42 Test Form	Joe Friday	District 42, Versailles	11/17/2014 1350	0	Yes	Inactive	   
Derek Test Form	Joe Friday	District 42, Versailles	11/05/2014 1054	9	Yes	Active	   
Derek Test Form 2	Joe Friday		11/05/2014 1147	4	Yes	Inactive	   
New Form	Christine Saur	District 42, Versailles	03/29/2018 1346	0	No	Inactive	   
New Form	Christine Saur	District 42, Versailles	02/28/2019 1206	0	No	Inactive	   

**Other Forms**

Name	Agencies	Date Created	# of Instances	Publish Status	Active Status	Actions
1 Custom Form to Rule Them All	All Agencies	03/28/2013 1038	93	Yes	Inactive	   
11.0 Custom Form Test	District 42, Versailles	02/25/2019 0906	1	Yes	Active	   
Ann Test		07/06/2015 1427	0	No	Inactive	   

2. Using the icons in the **Action** column in the same row as the form, continue as follows:

- To delete a form, click .

**Note:** You may not delete a form that is active. You must first deactivate it.

- To download a form (in XML format), click .
- To open the *Form Preview* page with an example of a form, click .
- To edit a form, click . ("Form Editor" on page 252 for instructions.)

## Manage Custom Fields

At the top of each section of the Custom Fields form, you have the option to add fields from existing forms or upload custom fields.

Form Administration / Custom Fields Go Back

Incident Offender Fields					
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
ANGTESTAGENCY	No	Inactive	No	0	  
District 16, Peru - GA	Yes	Active	Yes	6	  
- All Agencies -	Yes	Active	Yes	196	  
District 42, Versailles	Yes	Inactive	Yes	396	  
A_standalone Pd	No	Inactive	No	0	  
All Other	No	Inactive	No	0	  

Incident Victim Person Fields					
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
District 42, Versailles	Yes	Active	Yes	317	  
- All Agencies -	Yes	Active	Yes	144	  
Indiana State Police	No	Inactive	No	0	  

### Add Fields from Existing Forms

- From the *Form Administration* page, click the Manage Custom Fields link to open the *Custom Fields* page.

Form Administration / Custom Fields Go Back

**Incident Offender Fields** + Add Incident Offender Fields + Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
ANGTESTAGENCY	No	Inactive	No	0	  
District 16, Peru - GA	Yes	Active	Yes	6	  
- All Agencies -	Yes	Active	Yes	196	  
District 42, Versailles	Yes	Inactive	Yes	396	  
A_standalone Pd	No	Inactive	No	0	  
All Other	No	Inactive	No	0	  

**Incident Victim Person Fields** + Add Incident Victim Person Fields + Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
District 42, Versailles	Yes	Active	Yes	317	  
- All Agencies -	Yes	Active	Yes	144	  
Indiana State Police	No	Inactive	No	0	  

**Incident Offense Fields** + Add Incident Offense Fields + Upload Custom Fields

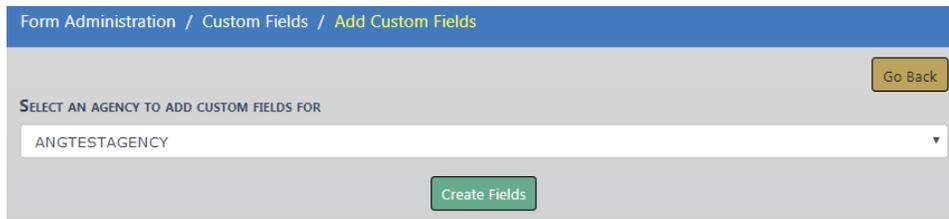
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
All Other	Yes	Active	Yes	19	  
Indiana State Police	Yes	Active	Yes	380	  
- All Agencies -	Yes	Active	Yes	10	  

You can

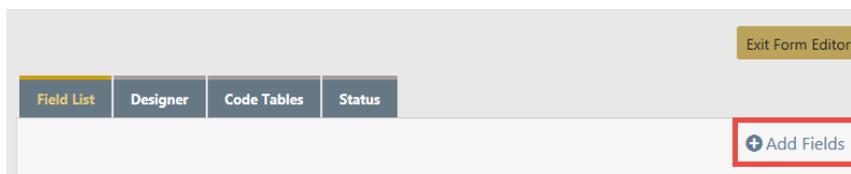
If you choose to add fields from existing forms, the following forms are available:

- Incident Offender
- Incident Victim Person
- Incident Offense
- Field Arrest
- Field Contact
- Case
- Warrant
- Citation
- Field Arrest Vehicle
- Incident Header
- Calls For Service
- Impound
- Court Paper

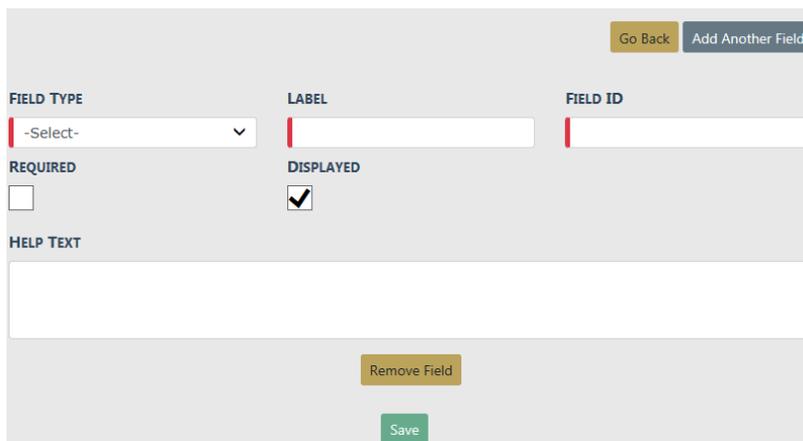
- Fleet Vehicle
  - Case Activity
  - Criminal Complaint
2. Click the appropriate [+ Add...Fields](#) link to open a page similar to the one shown.



3. Select an agency from the drop-down list if not already populated.
4. Click **Create Fields** to display a page similar to the one shown.



5. Click the [+ Add Fields](#) link to open the *Add Fields* page as shown.



6. Complete the fields and select appropriate buttons and click **Save**.
7. Click **Add Another Field** to add another field, if needed.

**Note:** If you want to remove the newly added field, click the **Remove Field** button.

8. Repeat Steps 6 and 7 until you have added all the fields needed.
9. Click **Go Back** to return to the previous page and click **Exit from Editor**.
10. Optionally click the **Designer** tab to open the Form Designer. This is used to position the fields on the form. For more information on the Form Designer, refer to "Designer Tab" on page 260.
11. Optionally click on the **Code Tables** tab to add a code table.
12. Click on the **Status** tab to activate or inactivate the form.
13. Click **Exit form Editor** to return to the *Custom Fields* home page.
14. Click **Go Back** to return to the *Form Administration* page.

### Upload Custom Fields

1. From the *Form Administration* page, click the Manage Custom Fields link to open the *Custom Fields* page.

Form Administration / Custom Fields Go Back

**Incident Offender Fields** + Add Incident Offender Fields + Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
ANGTESTAGENCY	No	Inactive	No	0	
District 16, Peru - GA	Yes	Active	Yes	6	
- All Agencies -	Yes	Active	Yes	196	
District 42, Versailles	Yes	Inactive	Yes	396	
A_standalone Pd	No	Inactive	No	0	
All Other	No	Inactive	No	0	

**Incident Victim Person Fields** + Add Incident Victim Person Fields + Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
District 42, Versailles	Yes	Active	Yes	317	
- All Agencies -	Yes	Active	Yes	144	
Indiana State Police	No	Inactive	No	0	

**Incident Offense Fields** + Add Incident Offense Fields + Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
All Other	Yes	Active	Yes	19	
Indiana State Police	Yes	Active	Yes	380	
- All Agencies -	Yes	Active	Yes	10	

2. Click the + Upload Custom Fields link to open the *Upload Form*.



3. Click **Browse** to the right of the **Select a File** field to open the *File Upload* window with your local directories.
4. Navigate to the folder containing form design documents.
5. Click to select a file and pull the path into the **Select a File** field.
6. Click **Upload** to upload the file and open the *Form Resource Review* page. Fleet Vehicle fields are used for illustration purposes, but the same general process applies to other areas.
  - a. If the Field IDs in the uploaded document match fields that already exist, then enter new **Field IDs** by entering new **Updated Value** values.
  - b. If no duplicate Field IDs are found in the uploaded document, a *No Duplicate Field Values Found* message appears.
7. Click the **Continue to Preview** button to open the *Add Fields* page
8. Select an **Agency** then click the **Create Fields** button to open the normal *Field List* screen.
9. Add more fields or click on the *Designer* tab to place the new fields on the form. For more information on the *Designer* tab refer to "Designer Tab" on page 260.

## Manage Form Code Tables

Use the following procedure to manage form code tables.

1. From the *Form Administration* page, click the Manage Form Code Tables link to open the *Code Tables* page as shown.

Form Administration / Form Code Tables

Go Back

➕ Add Code Table

Show 10 entries Search:

Table	Description	Actions
_CS_AIRCRAFT_OWNER_CODES		
_CS_AIRCRAFT_TYPE_CODES		
_CS_ANGTESTCODE		
_CS_ANIMAL_DEST_CODES		
_CS_ANIMAL_DOMEST_CODES		
_CS_AREA_SUB_TYPE_CODES		
_CS_AREA_TYPE_CODES		
_CS_ATTN_LIST		
_CS_BACKSTOP_TYPE_CODES		
_CS_CHECK_FLAG	Check for flag	

Showing 1 to 10 of 152 entries

Previous 1 2 3 4 5 ... 16 Next

Go Back

## 2. Add a Code Table.

- Click the [Add Code Table](#) link to open the *Code Table* page as shown.

Form Administration / Form Code Tables / Code Table

Go Back

**Code Table Details**

TABLE IDENTIFIER <sup>?</sup>

DESCRIPTION

**SORT ALPHABETICALLY** When checked, the codes will be sorted alphabetically regardless of how you enter them.

**Codes** ➕ Add New Code

Save

- Complete the fields and select the **Sort Alphabetically** button if applicable.
- Click the [Add New Code](#) link to open fields to enter a new code and its label.
- Complete the **Code** and **Label** fields then repeat until you have added all the codes you want for this table.
- Click **Save** to save the new table and return to the *Code Tables* page.

- To locate a code table, use the page buttons at the bottom of the page, or use the Search text box.

Previous 1 2 3 4 5 ... 16 Next

- To edit a code table, click the edit icon  in the **Actions** column.

[Go Back](#)

### Code Table Details

**TABLE IDENTIFIER** ⓘ

**DESCRIPTION**

**SORT ALPHABETICALLY** When checked, the codes will be sorted alphabetically regardless of how you enter them.

**Codes** [+ Add New Code](#)

CODE	LABEL	ACTIVE	
<input type="text" value="ST"/>	<input type="text" value="State"/>	<input checked="" type="checkbox"/>	
<input type="text" value="CAP"/>	<input type="text" value="CAP"/>	<input checked="" type="checkbox"/>	
<input type="text" value="DEA"/>	<input type="text" value="DEA/Customs"/>	<input checked="" type="checkbox"/>	
<input type="text" value="OTH"/>	<input type="text" value="Other"/>	<input checked="" type="checkbox"/>	

[Save](#)

- Make changes to existing codes or add new codes (refer to "Add a Code Table." on the previous page)
  - Click **Save** to save changes.
  - Click **Go Back** to return to the *Code Tables* page.
- Click **Go Back** to return to the *Form Administration* page.

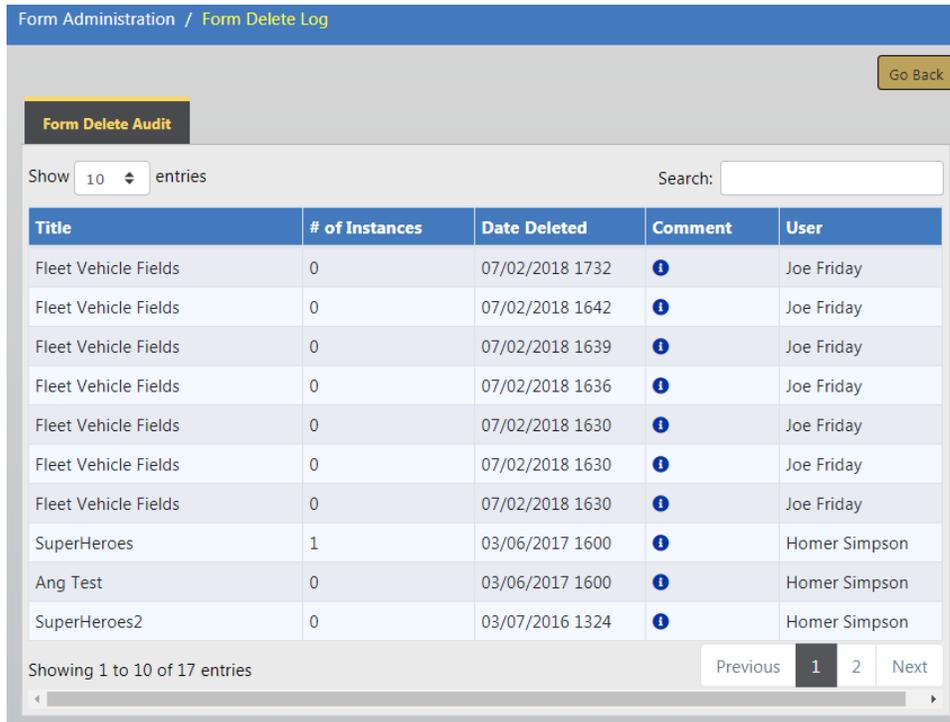
## Form Delete Log

Deleted form activity is written to the **Form Delete Log** table automatically with the form title, date it was deleted, comments, and the user who deleted the form.

**Note:** This table is read-only.

Use the following procedure to access the **Form Delete Log** table.

1. From the *Form Administration* page, click the Form Delete Log link to open the *Form Delete Log* page as shown.



2. Hover over or click on the blue information bubble for addition information.



## Form Editor

The Form Editor opens as shown below, displaying the **Form Details** tab, when you save a new form.

The screenshot shows the 'Form Editor' interface with the 'Form Details' tab selected. The form is titled 'Ang Test Custom Form 3'. The 'Publish Status' is 'Not Published' and the 'Active Status' is 'Inactive'. The 'Title' field contains 'Ang Test Custom Form 3'. The 'Description' and 'Print Header' fields also contain 'Ang Test Custom Form 3'. The 'Restrict To Agency' field is set to 'Click To Select'. The 'Default Security Level' is 'Patrol Supervisor' and the 'Officer Entry' is 'Officer is Required'. The 'Review Required' and 'Restrict Edit' checkboxes are both checked. The 'Roles' field contains 'CASE\_SUPERVISOR' and the 'Form Types' field contains 'Vehicles'. There are empty fields for 'Form Admins', 'Selected Form Admins', 'Restrict View Access Users', and 'Selected Users'. A 'Save' button is located at the bottom center.

The Form Editor also displays when you select a form to edit from the *Manage Forms* page after accessing it from the *Form Administration* page.

**Note:** The only field that cannot be changed once a custom form is published is the **Restrict to Agency** field. All other fields may be modified as long as the form's status is set to *Inactive*.

The Form Editor has seven tabs:

- The **Forms Details** is shown above. It opens upon initial creation of a form when a user saves a new form from the *Add Form* page. It also allows users to change form details after a form has been created.

- The **Number Generation** tab allows the user to configure number generation formats much like the number generation in other modules in Edit Agency. It also allows the user to enable or disable automatic number generation for custom forms. When enabled, a new Instance Number field containing the generated number displays on the view and edit screens. This number is unique to each customer form.
- The **Field List** tab displays a list of custom fields to be used on the form. From this tab, you can add additional fields and edit existing fields.
- The **Designer** tab is used to position the fields on the form.
- The **Reports** tab is used to specify a report for a form type with which the form is associated, including Incidents, Field Arrests, and Contacts.
- The **Code Tables** tab displays a list of Code Tables that the form uses.
- The **Routing** tab is used to specify the who, what, where, and when of form routing details. It also has a setting to allow the creation of an incident during the review process.
- The **Status** tab is used to publish and activate/deactivate forms. The current status of a form is always displayed on this tab.

Click on the **Exit Form Editor** button on the top right to exit the form editor at any time.

## Form Details Tab

The **Form Details** tab of the Form Editor is used to manage the form title, define what prints as the header on the printed copy, manage form security, require review, and more.

Use the following procedure to complete the information on the Form Details tab.

1. Enter a unique **Title** for the custom form.
2. Optionally, enter a **Description**. This displays to users who are viewing or editing an instance of this form.
3. Optionally, enter the **Printer Header**. This appears on the top of the first page when printing this form.
4. Optionally, **Restrict To Agency**. Leave blank, or select as many as needed.
5. Select the **Default Security Level** from the list provided.

6. Select the **Officer Entry** from the list provided.
7. Optionally, check the **Review Required** box. A notification appears in a yellow box at the top of the *Submit for Review* page requesting a user review a PDF copy of the form before the creator submits it.
8. Optionally, check the **Restrict Edit** box to restrict the creator of an instance of this form from putting it back into edit mode once it has been approved and finalized. Only a user with special permissions is allowed to do so.
9. Select one or more **Roles**.
10. Select one or more **Form Types**.

**Note:** If you wish to use this form without having to attach it to a specific record, select **Freestanding Forms** from this list. This allows users to add new instances of this form in the Forms & Report page.

11. Optionally, select **Form Admins**. Users added to this list can administer this form regardless of agency.
12. Optionally, select **Restrict View Access Users**. Only users added to this list can view, print, and search on this form.
13. Click **Save**.

## Number Generation Tab

The **Number Generation** tab of the Form Editor is used to configure number generation formats (a unique number) much like the number generation in other modules in Edit Agency, or to enable or disable automatic number generation. When enabled, a new Instance Number field containing the generated number displays on the view and edit screens.

### ***Enable Number Generation***

Use the following procedure to enable number generation.

1. From the Form Editor, click on the **Number Generation** tab.

2. Check **Enable number Generation for this Form** to display additional fields.

- a. Select a **Format** from this list.

**Note:** If the format you want is not listed, refer to the Number Generation tab of "Agency Profile" on page 17.

- b. Enter the **Next Number**; the beginning number of this series of number. For example, if you want the beginning number to be 1, enter 1.
- c. Enter the **Place Holder**. It could be letters or perhaps a hyphen (-). For example, if the number format you are using is YYIR000 and place holder is CF, then CF replaces the IR in the format.
- d. Select the **Effective Date**.
- e. Select the **End Date**, if applicable.
- f. Click **Save**.

**Note:** When Number Generation is enabled, a read-only field with the name **Instance Number** appears on the form containing the auto-generated number upon saving the form.

**Note:** The **Instance Number** also prints on standard Custom Form printouts.

## ***Disable Number Generation***

Use the following procedure to disable number generation.

1. From the Form Editor, click on the **Number Generation** tab.
2. Uncheck **Enable Number Generation for this form**.
3. All formatting fields no longer appear.
4. Click **Save**.

## **Field List Tab**

The **Field List** tab of the Form Editor is used to create fields to be used on a custom form.

*Public facing forms* support the following *Custom Form Field Types*:

- Date
- Date & Time
- Text - Single Line
- Text - Multiple Line
- Checkbox
- Radio Buttons
- Select LOV - Single Value
- Auto Complete

For more information on *Public facing forms*, refer to “Community Reporting with Custom Forms” on page 272.

Use the following procedure to set up fields for a form. Keep the above in mind if you are creating a *Public facing form*.

1. From the Form Editor, click on the **Field List** tab to display the **Name Form**.

Field ID	Label	Field Type	Positioned	Required	Displayed	Comment	Actions
RANDOM_FIELD	Random Field	Text - Single Line	Yes	No	Yes	Don't Specify Comment	

**Note:** You also open this page when you save a new form on the *Add Form* page, but the list is empty for a new form.

- Click the Add Fields link to open the *Add Fields* page as shown in the following examples.

**FIELD TYPE**  
-Select-

**REQUIRED**

**DISPLAY IN ADDITIONAL DETAILS** ⓘ

**HELP TEXT**

**LABEL**  
[Empty text box]

**DISPLAYED**

**FIELD ID**  
[Empty text box]

**COMMENT**  
Don't Specify Comment

**Remove Field**

**Save**

- Type values in the **Label** field and select to complete the **Field Type** field.

**Note:** Additional parameters may appear based on the chosen Field Type. For example, if you select the Field Type *LOV*, the required field **Field Code Type** appears and the user must select a value. You may flag a field on a custom form and have it displayed as an additional detail when the custom form is displayed in various tables throughout the application. These pages include My Forms (initial and rejected), Forms for Review, Form Search Results, and Notifications. Sub Form fields cannot be set as additional details.

- Enter a value in the **Field ID**.
- Check the **Required** box if this field is to be a required field.

6. Check the **Displayed** box if this field is to be displayed on the form on screen.
7. Select a **Comment**.
8. Add content to the **Help Text** box if you want to provide instructions about completing this field.
9. You can also perform the following tasks:
  - Click the Add Another Field link to add additional fields so that you can quickly add multiple fields without having to leave the page.

The screenshot displays a web interface for configuring custom form fields. At the top right, there are two buttons: 'Go Back' and 'Add Another Field', with the latter highlighted by a red box. Below these are two identical field configuration cards. Each card contains the following fields:

- FIELD TYPE**: A dropdown menu currently showing '-Select-'.
- LABEL**: A text input field.
- FIELD ID**: A text input field.
- REQUIRED**: A checkbox, currently unchecked.
- DISPLAYED**: A checkbox, currently checked.
- COMMENT**: A dropdown menu currently showing 'Don't Specify Comment'.
- HELP TEXT**: A large text area for additional instructions.

Below each card is a 'Remove Field' button. At the bottom center of the interface is a 'Save' button.

- Click **Remove Field** to remove a field.
10. When the required fields have been filled out and all the information is correct, click **Save** to save the new custom fields.
  11. The **Field List** tab displays with the new field listed which has **No** displayed in the **Positioned** column.



Field ID	Label	Field Type	Positioned	Required	Displayed	Comment	Actions
ADDCOMMENT	Additional Comment	Text - Single Line	No	No	Yes	Comment Optional	
RANDOM_FIELD	Random Field	Text - Single Line	Yes	No	Yes	Don't Specify Comment	

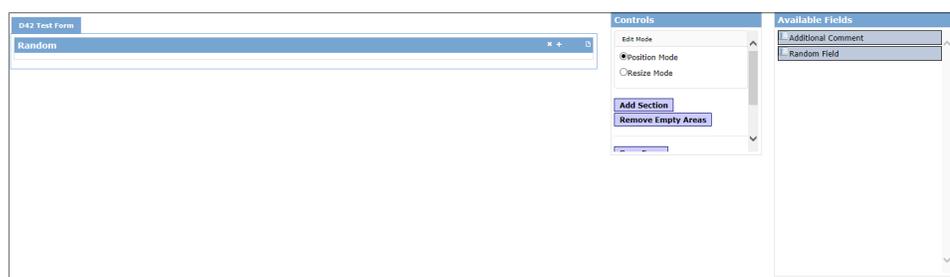
## Designer Tab

The fields that were set up on the **Field List** tab are positioned and sized on a form using the **Designer** tab of the Form Editor. The **Designer** tab allows you to layout a form using a drag/drop user interface.

- Use the Position Mode to design the visual layout of a form.
- Use the Resize Mode to adjust the position and size (width) of fields in a row based on a percentage of the total form width.

Use the following procedure to position fields on a form.

1. From the Forms Editor, click the **Designer** tab to open it.
2. Click the [Launch Form Designer](#) link to display the form designer page as shown in the example.

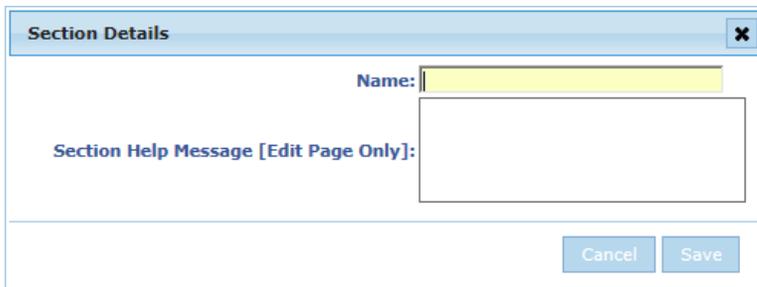


**Note:** This page does not adjust to the size of the browser window. Scroll to the right to see the **Available Fields** list.



You can drag and drop the **Controls** pane and the **Available Fields** list anywhere on the screen. For example, you might want to drag the **Available Fields** list so that it is located below the **Controls** to make it easier to see all the elements of the screen at once. However, should you close the Form Designer then reopen it, the elements appear in their default positions once again.

3. Click **Add Section** in the **Controls** pane to display the *Section Details* window as shown.



4. Type a name for the section in the **Name** field and a **Section Help Message**. Click **Save** to redisplay the page as shown in the example.



5. Adjust a section as follows:
  - Click **+** in the far right of the new section to add a row, then drag and drop one or more fields into the row.
  - Click **X** to remove a section.
  - To delete a row from a section, click **X** in to the left of the row in the left margin of the section.

- Rows can hold multiple fields horizontally; however, if you want to add fields vertically, you must add another row.
  - Both sections and rows can be repositioned. Use the drag and drop method or the up and down arrows.
6. Repeat Steps 3 through 5 to add and adjust as many sections as you need for the form.

**Note:** You can remove empty sections if you decide you need fewer sections. You can move sections and/or fields as needed by dragging and dropping, and you can revert at any time to return to the form to the state it was at the time you last saved.

7. Click **Save Form** at any time to save the work you have. If the form is not complete, a *Design Validation* box appears giving you the option to save or cancel your design.



- It is important to save often to avoid losing work.
  - If needed, the **Revert** button allows you to return the form as it was the last time you saved.
  - The **Save Form** button label displays in red if any changes have been made since the last save.
8. Click the **Resize Mode** radio button and adjust the horizontal alignment of fields as needed.

Fields appear where you can enter alignment values. The values in each box represent a percentage of the total form width. To increase the width of a field or label, type a higher number in the box; to decrease the width of a field or label, type a lower number.
  9. When you think the form is complete, save and click **Exit Designer** to return to the **Designer** tab of the Forms Editor.
  10. Click **Preview** to review your form.

- Use the **Switch to...** button to toggle between **View Mode** and **Edit Mode**.
- Click the **Print** button to open a pdf version of the form to see it as it will appear when printed.
- If the form needs changes, click **Exit Preview** then click the Launch Form Designer link to display the form designer page again where you can make changes.

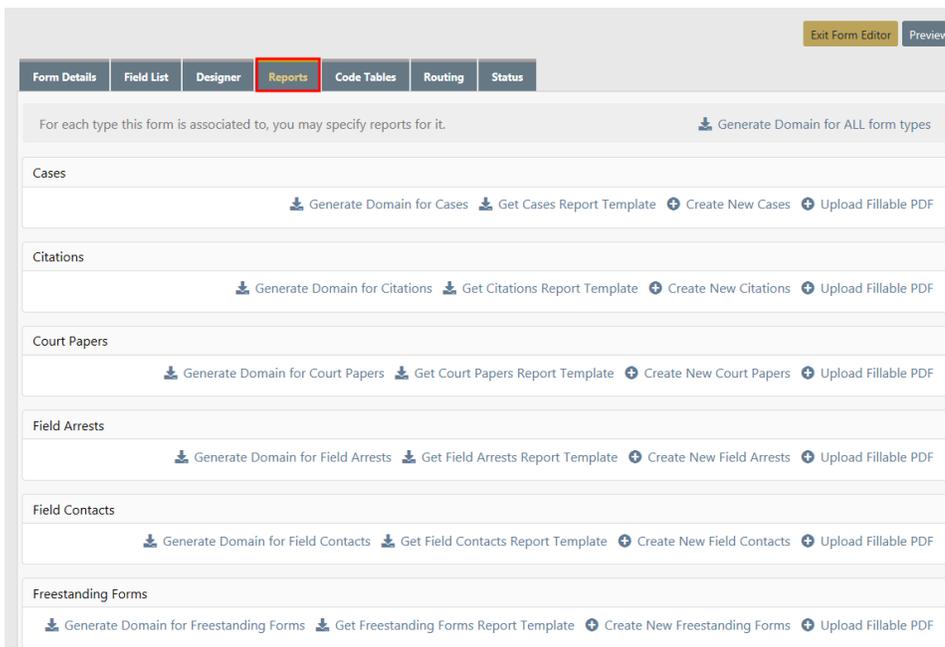
## Reports Tab

The **Reports** tab of the Form Editor is used to specify a report for any Form Type with which a form is associated. Form Types include Incidents, Field Arrests, Field Contacts, and Vehicles. Available options are based on Form Type selections made on the **Form Details** tab. Multiple types may be associated with a form simultaneously.

You have the ability to generate form letters and reports by integrating fillable PDFs.

Use the following procedure to download .jrxml template files.

1. From the Form Editor, click the **Reports** tab to open it.



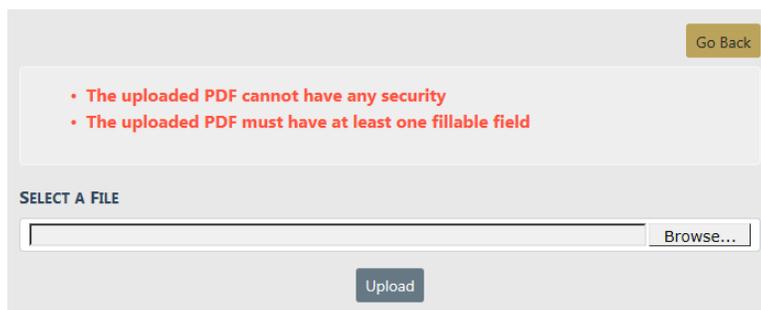
Report Types that were selected on the **Form Details** tab are reflected here.

**Note:** The link titles that appear in blue vary and may not appear exactly as shown in the example.

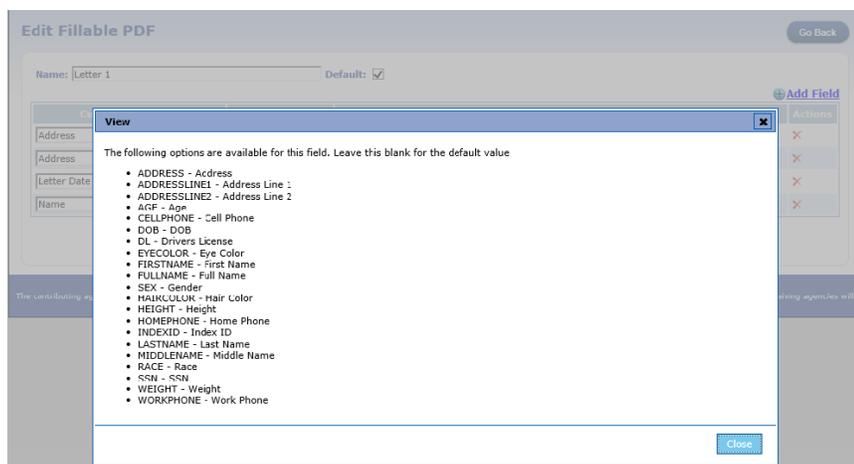
2. Use the [Get...Report Template](#) links to download .jrxml template files of the selected association types. Once they are downloaded you can save the templates then edit them as needed.
3. Optionally use the [Upload Fillable PDF](#) link to locate and upload an existing fillable PDF file that has at least one fillable field on it.

**Note:** The agency is responsible for procuring the appropriate PDF license that supports the creation of fillable PDFs.

- Click **Browse** to locate the PDF file, then click **Upload**.



- Enter a report **Name** and select **Default** to display this report on the Custom Form for users to print. Multiple fillable PDFs can be associated to one Custom Form. If only one PDF exists, it prints by default regardless if the **Default** option is checked.
- Click the [Add Field](#) link to map the Custom Form fields to the Fillable PDF fields.



A Format String (Token) can be entered for how the data should print, or leave it blank for the default.

For example, for a person the string {FULLNAME} {DOB} could be specified. Labels may also be included by entering the string {TOKEN| Optional label}.

Click on the Blue Info Bubble to view available format options.

**Note:** Tokens are case sensitive.

- Optionally use the individual Generate Domain for... links to select the fields on which to report.

**Note:** Click the Generate Domain for ALL Form Types link to generate them all at once.

- Optionally select agencies on the Configuration tab to include in the report. If no agencies are selected, the report includes all agencies.

The screenshot shows the 'Configuration' tab for 'D42 Test Form'. It includes a 'Go Back' button in the top right. The main content area contains instructions: 'Select which fields you would like to report on. The page is organized based on the form and sub forms. One tab will be displayed for the main form, and a tab for each sub form will be displayed.' It also mentions that for fields with comments enabled, users can choose to report on comments, and for complex fields like master index people, they must select specific information. A section titled 'Important things to remember' lists two points: 'The more fields you select, the slower the report can get. Only select what is absolutely needed. Remember you can create multiple domains for the same form.' and 'The domain created will only be valid for this schema you are currently in. If you want to create a domain for the exact same form in a different schema, you will have to log into the RMS on that schema and repeat this process'. Below this, there is a 'RESTRICT TO AGENCY' section with a text input field containing 'Ang Police Department' and 'Indiana State Police'. A 'Generate' button is located at the bottom center.

- Click on the second tab and select the fields to include. The title of the second tab is the title you gave the report.

The screenshot shows the 'D42 Test Form' tab. It includes a 'Go Back' button in the top right. The main content area contains three checkboxes: 'Additional Comment' (checked), 'Include Comments' (checked), and 'Random Field' (unchecked). A 'Generate' button is located at the bottom center.

- Click **Generate** to generate and download an XML file.

- In the pop-up window click **Save** to save the XML file to your computer or network, or click **Open** to view the file.
  - Click **Go Back** to return to the previous window.
5. Use any Create New... link to open the *Add Report* page as shown.

**Add Report** Go Back

Report Details

**Report Type:**\* Custom Form Report

**Report Name:**\*

**Description:**

---

Report Association Details

This report will be associated with the **D42 Test Form** custom form.

Save Go Back

- The **Report Type** field always has the value *Custom Form Report*. This field value cannot be changed.
  - The **Report Name** field is for a name of your choosing used to differentiate between multiple reports of the same report type.
  - The **Description** field allows you to add a description to define the report's purpose.
  - At the bottom of the page is a reminder of the form with which this report is associated.
6. When you have completed the fields, click **Save** to open the *Edit Report* page as shown in the following example.

**Add Report** Go Back

Report Details

**Report Type:**\* Custom Form Report

**Report Name:**\*

**Description:**

---

Report Association Details

This report will be associated with the **D42 Test Form** custom form.

Save Go Back

7. If needed, make changes and click **Save**.

8. Click **Exit** to return to the Form Editor as shown in Step 1 with the new report listed in the appropriate grid.

## Code Tables Tab

The **Code Tables** tab of the Form Editor is used to list code tables used by the form for specified lists of values (LOV) fields, or pick lists, fields and to add code tables.

Use the following procedure to add and edit code tables associated with a form.

1. From the Form Editor, click the **Code Tables** tab to open it.



If the form has been set up to use one or more code tables for LOVs fields, the tables are listed here. The **Code Table ID** and, if entered, the **Description** of each table display, and the edit icon  in the **Actions** column provides the ability to edit the table.

2. To add a custom code table, continue as follows:
  - Click the Add Code Table link to open the *Code Table* page as shown.

- Complete fields as follows:

- **Table Identifier** – Enter a label to assign to the code table to differentiate it from other code tables. This label must be all upper case alpha-numeric characters with no spaces. Underscores are allowed. **\_CS\_** must be added to the label as a prefix to conform to the naming convention for code tables. **Note:** This is a required field, and the record is not saved properly without a valid label.
  - **Description** – Enter a description of the custom code table.
  - **Sort Alphabetically** – Check the box if you want codes to be sorted alphabetically regardless of how they are entered.
- Click **Save**.
3. To add a code to the table, continue as follows:
- Click **Add New Code** to open a **Code** field, a **Label** field, an **Active** box and a delete icon across the bottom of the page as shown.

The screenshot shows a web form titled "Code Table Details". At the top right is a "Go Back" button. The form contains the following sections:

- TABLE IDENTIFIER**: A text input field with a red vertical bar on the left side.
- DESCRIPTION**: A larger text input field.
- SORT ALPHABETICALLY**: A checkbox followed by the text "When checked, the codes will be sorted alphabetically regardless of how you enter them."
- Codes**: A table with three columns: "CODE", "LABEL", and "ACTIVE".
 

CODE	LABEL	ACTIVE
<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>

 A red arrow points from the "Add New Code" button to the "LABEL" field. A delete icon is visible to the right of the "ACTIVE" checkbox.
- Save**: A green button at the bottom center.

- Complete the **Code** and **Label** fields.
  - Click **Save**.
4. To edit a code table, click  in the **Actions** column (see example in Step 1 above) to display the *Code Table* page.

**Note:** Code tables can be used by more than one form. A list of forms that use this code table display in the yellow banner in the middle of the page.

5. Continue as follows:

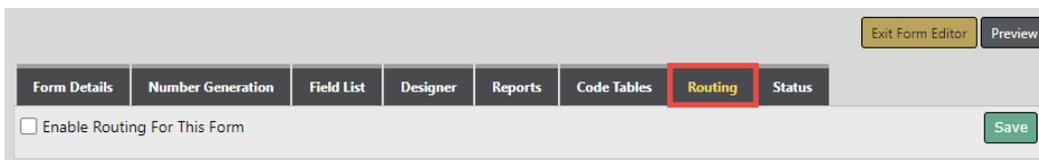
- Make changes to any field or box except the **Table Identifier** field. To change this value, you must delete the table and start over.
- Use the delete icon to delete any unneeded codes.
- Click Add New Code to add a new code. (See Step 3.)
- When changes are complete, click **Save**.

## Routing Tab

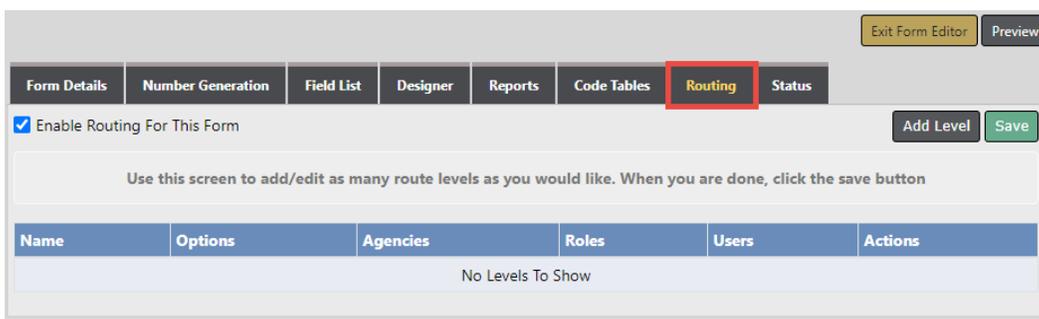
Custom forms can be routed in a way similar to Incident Report routing. Notifications are sent to designated users, roles, and/or – in a statewide organization – agencies. From the Form Editor, the administrator can set up one or more levels of routing as needed, entering comments that are included in the notifications sent to routing recipients.

Use the following procedure to set up routing for a custom form.

1. From the Form Editor, click the **Routing** tab to open the tab as shown.



2. Check the **Enable routing for this form** box to enable and display the tab as shown.



**Note:** If routing is not enabled for a form, review submission is not required.

**Note:** With Online RMS11.5 and higher, multi-tier routing has been added to route a form through multiple levels of review.

3. Select the **Add Level** button on the right to open the *Route Level* form.

Route Level

**General Route Options**

**NOTIFICATION TEXT**

Level 2

Require Comment On Submission

Disable Addition of Users

Disable Removal of Users

Disable Addition of Roles

Disable Removal of Roles

Require One User

User may cancel next level (Does not apply to first level)

**User Route Options**

**ADD USER**

**SELECTED USERS** Double Click To Remove

**Role Route Options**

**ROLES**

Search...

AGENCY\_AD\_HOC\_REPORTING\_TOOL

AGENCY\_ADMIN

CAL\_ADMIN

4. In the **General Route Options** section:
  - a. Check the **Require Comment On Submission** box if you want to require a comment when the user submits it.
  - b. Check the **Disable Addition of Users** box if you want to prevent users from adding additional users.
  - c. Check the **Disable Removal of Users** box if you want to prevent users from removing users.
  - d. Check the **Disable Addition of Roles** box if you want to prevent users from adding additional roles.
  - e. Check the **Disable Removal of Roles** box if you want to prevent users from removing roles.
  - f. Check the **Require One User** box to require the selection of a user at time of route generation.

- g. Check the **User may not cancel next level (Does not apply to first level)** box if you do not want users to cancel the next level.
- 5. In the **User Route Options** section, specify which users are to receive notifications. Click into the **Add User** box and begin typing a user's name, then select the appropriate user from the list. The selected user appears in the **Selected Users** box automatically. **Double-click** on a **Selected User** to remove them from the selected list.
- 6. In the **Role Route Options** section establish which users are to receive notification by role.
  - a. Choose **Roles**.
  - a. Choose **Agencies**.

**Note:** Statewide organizations also have the ability to choose route to specific agencies. If no agency is selected, the form automatically routes to the form creator's agency.

- 7. Click **Ok** to add the route to the Routing tab.

Name	Options	Agencies	Roles	Users	Actions
Level 1	Comment Required: Yes Disable Add: No Disable Remove: No Can Cancel: No	District 21, Toll Road - SC District 42, Versailles	LEA_CLERK OFFICER OFFICER_SUPERVISOR	Benjamin (cid) Harrison Ralph Lauren	

**Note:** Clicking **Ok** creates your route level only. To save your changes to the database, you must also click the **Save** button when finished adding route levels.

- 8. Optionally, click the **Add Level** button again to add an additional level, and repeat until all desired levels are complete.
- 9. Optionally, check the **Allow Create Incident During Review...** checkbox.

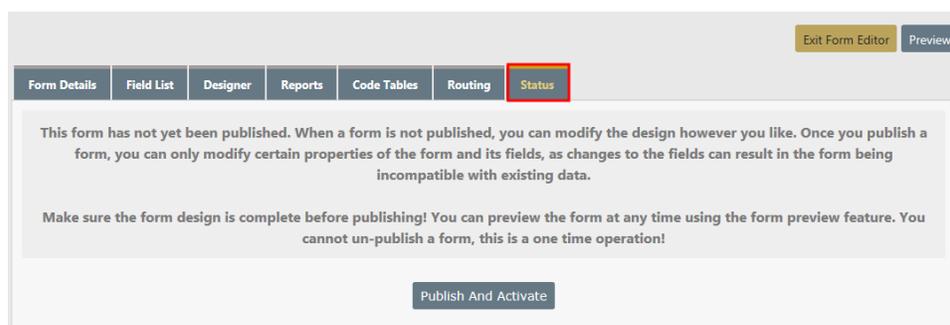
Name	Options	Agencies

Checking this box allows users with appropriate permissions to create an incident during the form review process.

10. Click **Save** to commit your changes to the database.

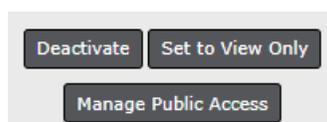
## Status Tab

From the Form Editor, click the **Status** tab to open it. The **Status** tab is used to publish and activate the form. Current status of the form is always displayed on this tab. It is important that the form is 100% complete and ready to be used before publishing it because some details cannot be changed after the form has been published.



The **Publish and Activate Form** button is available only if the form has not yet been published. Click it to set the Published Status to *Published* and the Active Status to *Active*.

The following buttons appear once the form has been published:



## Community Reporting with Custom Forms

In response to COVID-19, Caliber Public Safety is offering a new product feature with Online RMS 11.3.2 to support **Community Reporting** of minor crimes, tips, and other police-related events. The **Community Reporting** feature leverages the power of Online RMS *Custom Forms* for your agency to embed a public form in an existing website using only a couple lines of HTML code.

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

#### Benefits of **Community Reporting**:

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

This section provides instructions on how authorized Caliber Online RMS users administer and configure the **Community Reporting** feature.

## Agency Responsibilities

The following are the responsibilities of the agency when requesting the **Community Reporting** feature and implementing *Public Custom Forms*:

- Contact your *Caliber Customer Success Manager (CSM)* or enter a support request to sign-up for **Community Reporting**.
  - Caliber will add the **Community Reporting** (*Public Custom Form*) feature to your agency setup.
- Agency administrators are responsible for creating and managing *Custom Forms* or assigning privileges to other agency personnel to create and manage *Custom Forms* for public availability.
- Maintain and manage your agency's existing public-facing agency website.
- Modifications to your agency's website to add **Community Reporting**.
  - Caliber recommends that a system or website administrator perform the modifications.

Once your agency has access to the **Community Reporting** feature, follow these steps to implement *Public Custom Forms*:

1. "Permissions and Settings" on page 274.
2. "Number Generation" on page 275.

3. “Maintenance Values” on page 278.
4. “Make Custom Forms Publicly Available” on page 280.
5. “Add Publicly Available Forms To Your Website” on page 284.

For an example of what the implemented *Public Custom Form* looks like on the website, refer to “Sample Public Custom Form Website Display” on page 287.

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

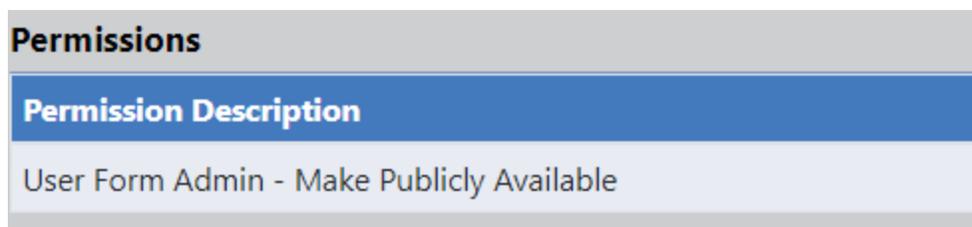
## Permissions and Settings

There are two permission categories for public form access and management:

- *User Form Admin - Make Publicly Available*
- *User Forms - Create Incident Form From*

### ***User Form Admin - Make Publicly Available***

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



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

**Note:** For more information on Permission Categories, refer to “Permission Categories” on page 175.

**Note:** For more information on Roles, see “Roles” on page 77 .

### User Forms - Create Incident From Form

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

The screenshot shows a configuration interface for the 'User Forms - Create Incident From Form' permission. At the top, there is a 'Permissions' header. Below it, a blue bar contains the text 'Permission Description'. Underneath, the text 'User Forms - Create Incident From Form' is displayed. The main interface has a top navigation bar with three tabs: 'Approve Form' (with a thumbs up icon), 'View Form' (with an eye icon), and 'Attachments' (with a paperclip icon). Below the tabs is a 'COMMENT' section with a text input area. At the bottom, there is a 'CREATE INCIDENT' section with a checkbox and a 'Save' button.

### Number Generation

The **Create Incident** option from publicly available *Custom Forms* requires that your agency has an active *Number Generation format* configured.

**Note:** For more information on the **Create Incident** option, refer to “Permissions and Settings” on page 274.

If your agency does not have an active *Number Generation format* configured, select one of the following options to generate an incident report from a publicly available custom form:

### **Generate Incident Number from Online RMS (Recommended)**

1. On the Number Generation tab of the *Agency Profile*, create a *Number Generation format* with **Incident** as the *Type*.

**Note:** For detailed instructions on creating a *Number Generation format*, refer to “Add Number Generation” on page 23.

2. Once configured, users see that the Report Number auto-generates when selecting **Create Incident** from a publicly available custom form.

The screenshot shows a web interface with a top navigation bar containing 'Approve Form', 'View Form', and 'Attachments'. Below this is a 'COMMENT' section with a yellow background containing the text 'Reviewed community submission and creating incident report to document offense reported'. Underneath is the 'CREATE INCIDENT' section, which includes a checkbox that is checked and a note: 'Upon Creation, this form will be associated with the incident. Any information entered here can be changed later.' At the bottom of this section, the 'REPORT NUMBER' field is highlighted with a red border and contains the text 'Auto Generated'.

### **Manually enter Incident Number from CAD**

This option is for agencies that use a CAD System to generate Incident and Case Report numbers for Online RMS.

**Note:** With this option, you need to request a case number from CAD or self-generate from Caliber Mobile.

1. An additional setup is required to configure Online RMS to avoid the creation of an RMS incident report from a CAD spill. This prevents the Case number from generating an incident report in Online RMS before the officer has a chance to generate the incident report from the publicly available *Custom Form*.
  - a. In *Caliber CAD*, create a **Tracking Number Generator** for **Community Reports Submitted by the public** and configure a **Type Code**.
  - b. In *Online RMS*, update **XML Doc Options** for the **CAD Interface** to ignore the **Case Tracking Number generator Type** configure for *Community Reports*. Option code of IGNORE\_INCIDENT\_TYPES.

**Note:** If you need assistance, please call *Caliber Customer Support*.

2. In *Online RMS*, create a *Number Generation format* on the *Number Generation* tab of the *Agency Profile*, following [#GenerateIncidentNumberFromRMS](#) with two exceptions:
  - a. Select a **Format** that matches the **Tracking Number** format configured in *Caliber CAD*.
  - b. Enter **0** (zero) in the **Next Number** field.
3. Once configured, users are required to type the number provided from *Caliber CAD* when selecting **Create Incident** from a publicly available custom form to generate the incident report in *Online RMS*

The screenshot displays the 'CREATE INCIDENT' section of the Online RMS interface. At the top, there are three tabs: 'Approve Form', 'View Form', and 'Attachments'. Below the tabs is a 'COMMENT' section with a text area containing the text: 'Reviewed community submission and creating incident report to document offense reported.' Below the comment is a 'CREATE INCIDENT' section with a checked checkbox and the text: 'Upon Creation, this form will be associated with the incident. Any information entered here can be changed later.' Below this is a 'REPORT NUMBER OPTIONS' section, which is highlighted with a red box. It contains two radio button options: 'Enter a # to generate a report number for the current year' (selected) and 'Enter a full # in the format YY-000000'. Below the options is a 'REPORT NUMBER' text input field.

## EJS\_CODES

- CODE\_TYPE = FORM\_REJECT\_REASON\_CODES
  - Out of the box values: Bad Address

## Maintenance Values

### Set the Default Incident Type for Incident Reports

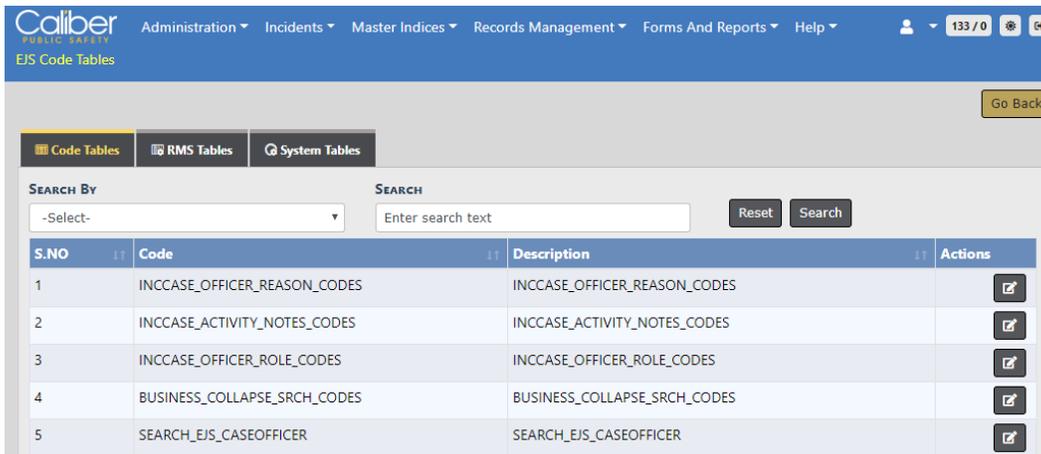
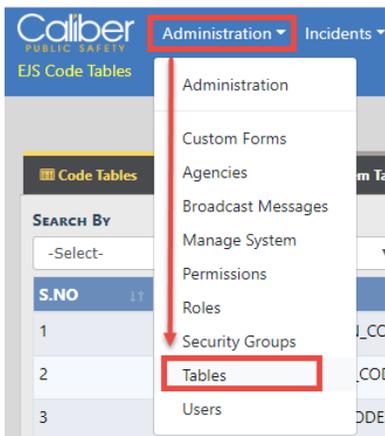
For agencies using **Incident Report Types**, a new **Agency Maintenance** setting is available to default the **Incident Type** for Incident Reports created from a publicly available *Custom Form*.



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

With appropriate permissions, you can apply settings by following these steps:

1. Click on **Administration** on the top menu, then click **Tables** to open *EJS Code Tables*.

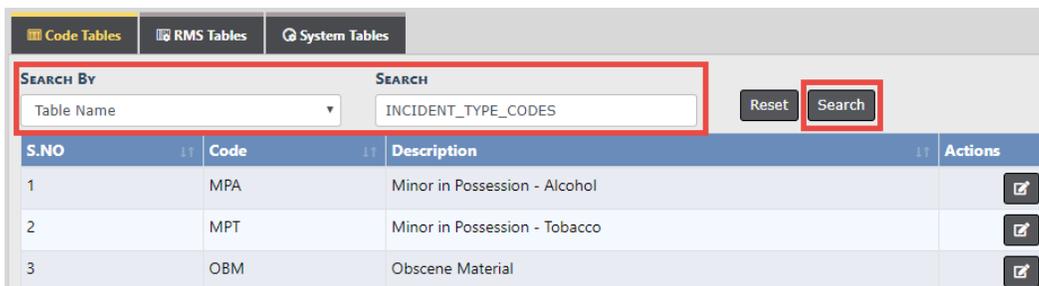


The screenshot shows the 'EJS Code Tables' page in the Caliber Public Safety application. The page has a search bar and a table with columns S.NO, Code, Description, and Actions. The table contains five rows of data.

S.NO	Code	Description	Actions
1	INCCASE_OFFICER_REASON_CODES	INCCASE_OFFICER_REASON_CODES	[Edit]
2	INCCASE_ACTIVITY_NOTES_CODES	INCCASE_ACTIVITY_NOTES_CODES	[Edit]
3	INCCASE_OFFICER_ROLE_CODES	INCCASE_OFFICER_ROLE_CODES	[Edit]
4	BUSINESS_COLLAPSE_SRCH_CODES	BUSINESS_COLLAPSE_SRCH_CODES	[Edit]
5	SEARCH_EJS_CASEOFFICER	SEARCH_EJS_CASEOFFICER	[Edit]

There are three tabs. The *Code Table* tab opens by default.

- 2. Select **Table Name** as *Search By*, enter **INCIDENT\_TYPE\_CODES** in the *Search text box*, then click the **Search** button to display the **INCIDENT\_TYPE\_CODES** list.



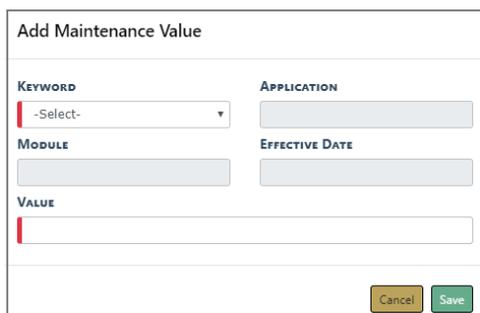
- 3. Locate the **Incident Type** or **Code** you want to associate with the *Public Custom Form*.
  - a. If the **Incident Type** *exists*, make note of the Code and proceed to the next step.
  - b. If the **Incident Type** *does not exist*, and you have the proper permissions, add a new **Incident Type**, then proceed to the next step.

- 4. Enter the **Code** as a *Maintenance Value*.

- a. Access the *Maintenance Value* table through the Agency Profile.  
For instructions, refer to “Access Maintenance Values” on page 346.
- b. Click the **Add Maint Value** button to open the *Add Maintenance Value* dialog box.



- c. In the *Add Maintenance Value* dialog box, select the **Keyword** *FORM\_INCIDENT\_DEFAULT\_TYPE*, and enter the Code as the **Value**.



- d. Click **Save**.

## Make Custom Forms Publicly Available

**Community Reporting** leverages the power of Online RMS *Custom Forms*, allowing agencies to create and manage their publicly available forms.

Follow these steps to make *Custom Forms* publicly available:

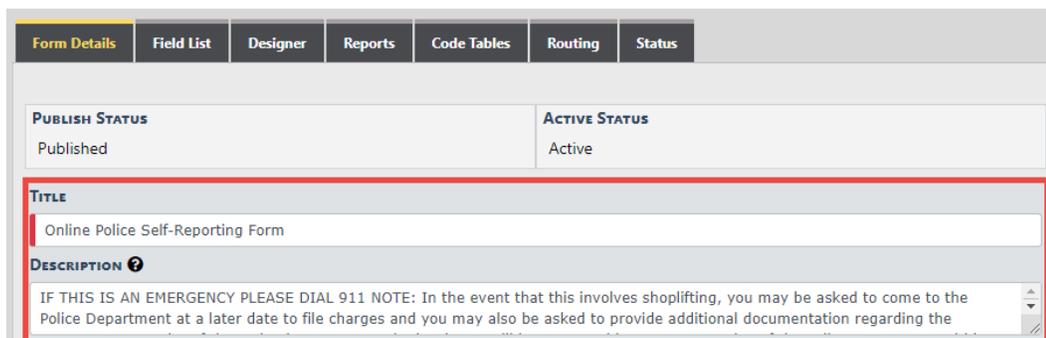
1. Create a *Custom Form* containing fields you wish to present to the public.

For more information on *Custom Forms*, refer to “Custom Forms” on page 237.

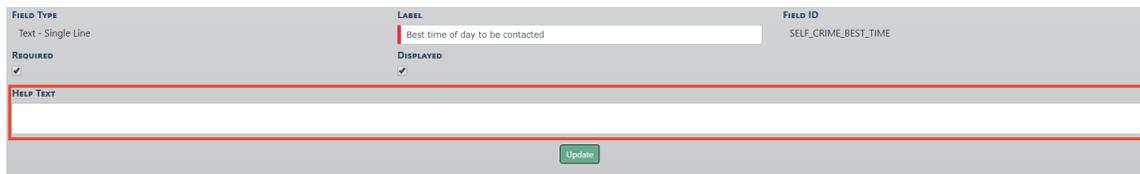
### Publicly Displayed Data

In addition to *Custom Form* data fields, the following appears on the agency's web page when the *Custom Form* displays to the public:

- Custom Form **Title** and **Description** fields from the *Form Detail*stab.



- **Help Text** for each Field Type.

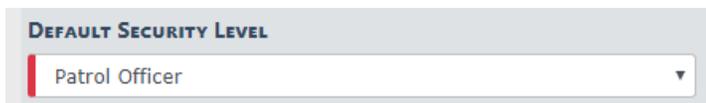


- Form **Section Groups** from the *Designer* tab.

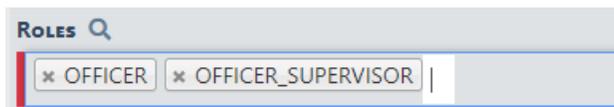


2. Configure **Default Security Level**, **Roles**, and **Form Types** on *Form Details* tab.

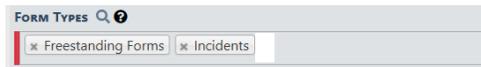
- a. Set the **Default Security Level** at a level equal to the lowest level of the user security you want to access the form.



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



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



3. Configure **Routing** on the *Routing* tab.

- a. Check the **Enable Routing for this form** checkbox.



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

**Routing Options**

**REQUIRE COMMENT ON SUBMISSION**

**MANDATORY - USER MAY NOT REMOVE THE SELECTED USERS/ROLES**

**USER MAY NOT ADD ADDITIONAL USERS/ROLES**

- c. Select **User Routing Options**. Select individual users to notify when a public form is submitted.

**User Routing Options**

**ADD USER**

**SELECTED USERS** Double Click To Remove

- Benjamin (cid) Harrison
- Ralph Lauren

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

**Role Routing Options**

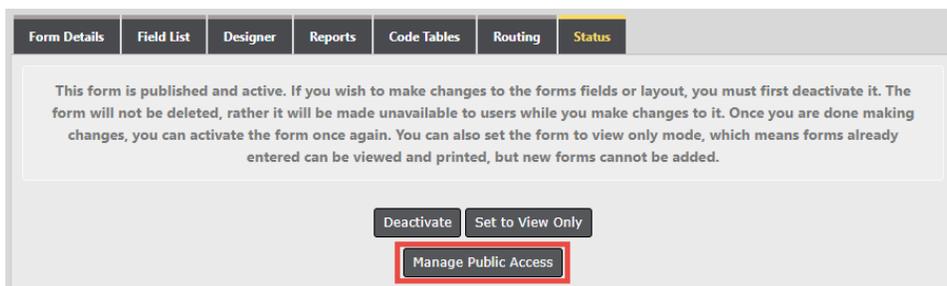
**ROLES**

- LEA\_CLERK
- LEA\_RECORDS\_MGMT
- OFFICER
- OFFICER\_SUPERVISOR

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

**AGENCIES** No Agency Selection will route the form to the agency it was created in.

- 4. Configure **Manage Public Access** on the *Statustab*.
  - a. Select the **Manage Public Access** button.  
**Note:** This button only appears for users having a role with the *User Form Admin - Make Publicly Available* permission.



- b. Select the **Create Token** button on the upper right.
- c. Select the **Agency** as the agency to **Save** for this *Custom Form*.  
The form routes to this agency, unless a different agency is specified on the *Routing Option* tab.
- d. Enter **Allowed Domain(s)**.  
This is the domain of the agency's website, where the public form is available. For example, if your website is [www.myagency.com](http://www.myagency.com), you would enter *www.myagency.com* for **Allowed Domains**.



- e. Click **Save**.
- f. A unique **Token ID Number** generates for the agency and form combination upon saving.
- g. **Copy** the Token by **using your mouse to highlight the Token**, then pressing **Ctrl + C** keys on your keyboard at the same time.

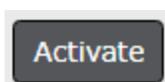
Agency	Token
Caliber Public Safety PD	a21e1d1d-e578-4fe1-a57a-ed7868173b46

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

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

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

- When finished with the *Custom Form*, click on the *Status* tab and select the **Activate** button.



**Note:** *Public Custom Forms* are not accessible from your website until the form is activated.

**Note:** If a *Public Custom Form* is not activated, the public will see the below error when navigating to the web page you configured to display the Public Form:



#### ERROR RETRIEVING FORM: 404

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

Environment: demo

Is the form active for Public Access?

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

## Add Publicly Available Forms To Your Website

**Community Reporting** easily displays within your agency's existing website, creating a consistent online experience for your community to submit report online. **Publicly Available Custom Forms** inherit the look and feel of its surroundings on your website, making it appear as if it were an original part of your web page.

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

## Web Page Modifications

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

Below is a simplified example of a web page and how it should be modified to enable **Community Reporting**.

- The **id** is the **Token ID** generated for the *Custom Form* in Online RMS.
- The **id="12345678-abcd-1234-abcd-1234567890ab"** in the **<caliber-custom-form>** section must be changed to use the **Token** generated for your *Custom Form* in Online RMS.

For more information on the generated **Token ID**, refer to “Make Custom Forms Publicly Available” on page 280.

- The yellow highlighted lines must be added to your existing website.

```
<html>
  <head>
    <!-- (Existing content) -->
    <!-- ... -->
    <!-- Add the following line for Caliber Community Reporting -->
    <script src="https://community.public-safety-cloud.com/assets/custom-form-bundle.js"
    crossorigin=""></script>
  </head>
  <body>
    <!-- (Existing content) -->
    <!-- ... -->
    <!-- In the desired location, add the following line for Caliber Community Reporting -->
    <caliber-custom-form id="12345678-abcd-1234-abcd-1234567890ab">
    </caliber-custom-form>
    <!-- ... -->
  </body>
</html>
```

1. Modification labeled **1** tells the internet browser where to find the JavaScript that displays the *Custom Form* from Online RMS.

**Note:** Do not modify the contents of this line. Any changes to this line may cause the *Custom Form* not to display and may break other functionality of your web page.

- Modification labeled **2** identifies the location in your existing website where the *Custom Form* should display.

**Note:** You **MUST** update the `id="12345678-abcd-1234-abcd-1234567890ab"` to use the **Token** generated for your *Custom Form*. For more information on the generated **Token**, refer to “Make Custom Forms Publicly Available” on page 280.

### Display Configuration Options

There are four (4) *optional* configuration settings that can be added to the `<caliber-custom-form...></caliber-custom-form>` line.

Configuration options with their default values:

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

If you desire different display options than the default values, you can override the default values by adding the appropriate configuration option to the `<caliber-custom-form...</caliber-custom-form>` line and setting the value to `"true"`.

#### Example 1

If you do not want to display the **Custom Form Title** on the web page, use `hide-title="true"`. The **id** is the **Token ID** generated for your *Custom Form*.

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

### Example 2

Example of all available configuration options. The **id** is the **Token ID** generated for your *Custom Form*.

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

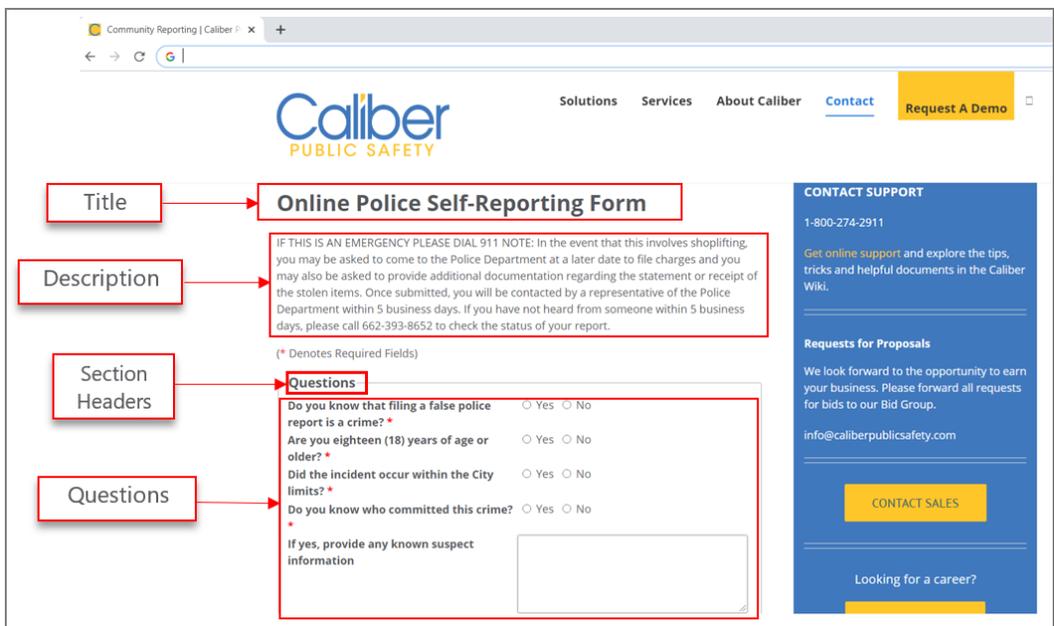
For more information on the generated **Token**, refer to “Make Custom Forms Publicly Available” on page 280.

For an example of how a *Public Custom Form* display on your agency website, refer to “Sample Public Custom Form Website Display” on page 287.

## Sample Public Custom Form Website Display

*Publicly Available Custom Forms* inherit the look and feel of its surroundings on your website, making it appear as if it were an original part of your web page.

Below is an example of how a *Public Custom Form* displays on your agency website:



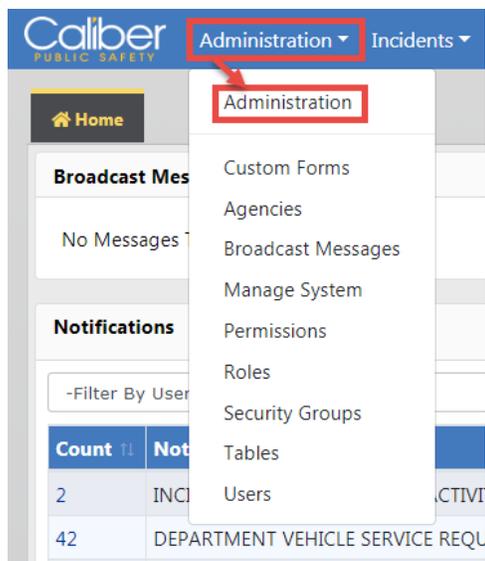


# Chapter 16. Module Admin

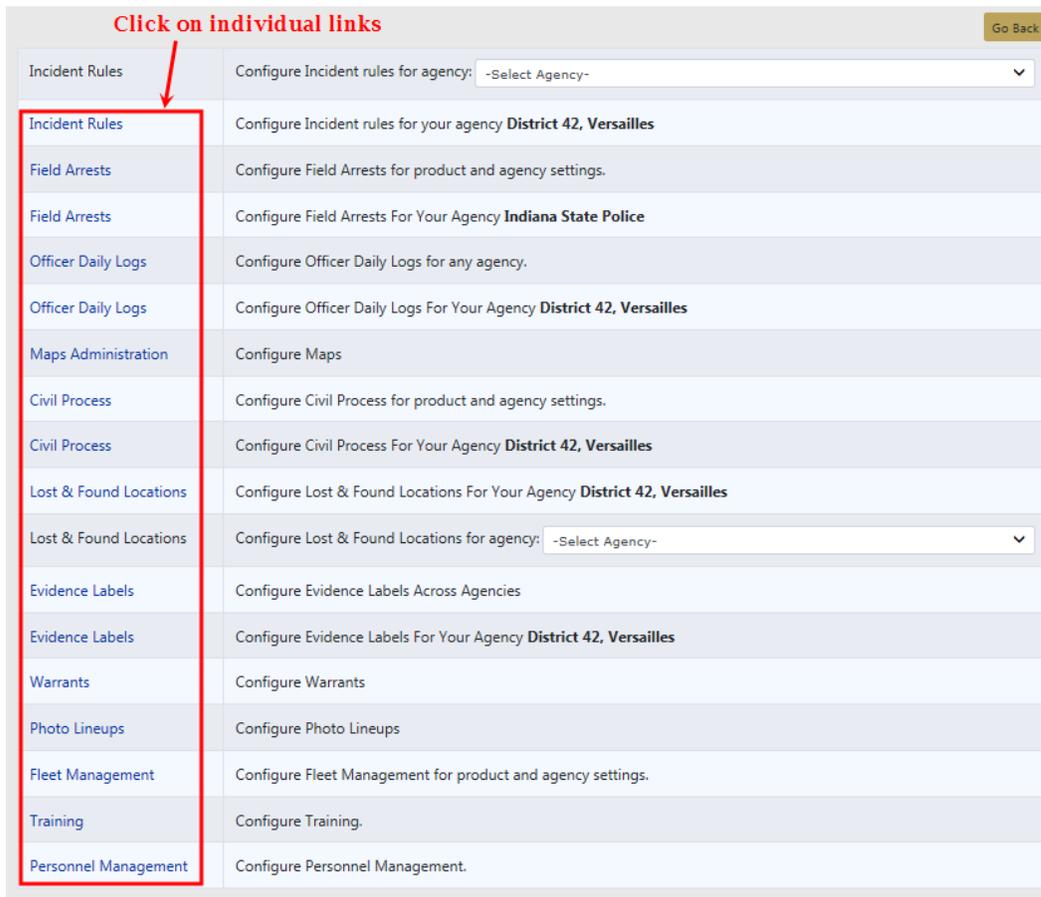
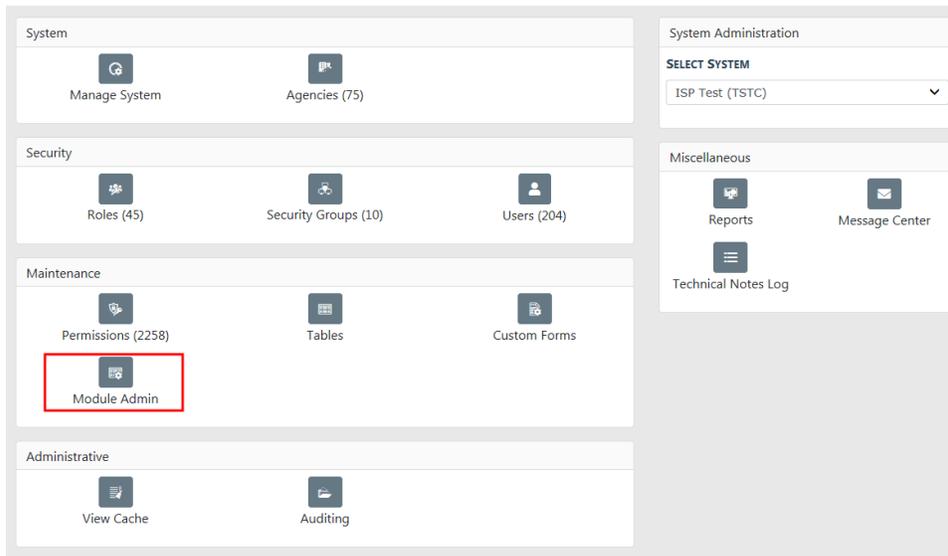
The Module Admin feature must be enabled by Caliber Public Safety personnel in order for an agency to use it. In addition, only administrative users who have been assigned the appropriate role can access and manage the Module Configuration page.

## Access Module Admin

Click on the **Administration** label, then **Administration** again, to access the *Administration Home* page.



Click the **Module Admin** link to open the *Module Configuration* page.



The column on the left of the *Module Configuration* page contains links to individual topics. Click on an individual link to open a unique configuration page for that topic.

**Note:** For multi-level agencies, administrators with appropriate permissions can choose a specific agency within their organization when managing *Incident Rules* and *Lost & Found Locations* configurations.

*Civil Process*, *Fleet Management*, and *Training* are used for illustration purposes; the remaining configuration setting options follow a similar process only with different data requirements.

## Incident Rules and Validation Settings

Authorized users can configure Incident rules and validations.

Manage these options from the *Module Configuration* page. For instructions on accessing the *Module Configuration* page refer to "Access Module Admin" on page 289.

You can Select Agency to manage its configuration, or you click on the Configure Rules For All Agencies link to open the Rules & Validations page.

Incident Rules	Configure Incident rules for agency: <input type="text" value="-Select Agency-"/>
Incident Rules	<a href="#">Configure Rules For All Agencies</a>

**Rules & Validations - Ang Police Department**

**Incident** | Incident Offense | Incident Victims | Incident Offenders

Agency: Ang Police Department  
Module: Incident

Color Indicates Condition is Inactive Show View: Condition Editor

Add Condition Expand All Collapse All

My Agency Conditions

- No Conditions

**Save**

Select each tab to add any necessary rule and validations.

You can set up a rule to trigger a set of questions to appear when a specific Incident Type is chosen. For example, Incident Type of Civil Dispute would trigger the Yes or No question of "Was a Civil Citation Issued?"

## Civil Process Product Settings

Product configuration options include the following:

- Court Paper Types
- Court Paper Sub-Types
- Reference Types
- Other Party Roles
- Party/Org Roles
- Payment Types
- Log Action Types

To manage these options from the *Module Configuration* page, click the Civil Process link with *product and agency settings* in the description. For instructions on accessing the *Module Configuration* page refer to "Access Module Admin" on page 289.

Civil Process	Configure Civil Process for product and agency settings.
Civil Process	Configure Civil Process For Your Agency <b>District 42, Versailles</b>

The *Product Configtable* opens with the seven configuration options in separate tabs across the top, resting on the **Court Paper Types** tab by default.

Administration / Module Configuration / Civil Process Configuration

Civil Process Product Administration Go Back

**Seven Tabs**

Code	Description	Active	Details	Actions
OP	Civil Protection Order	Yes	<ul style="list-style-type: none"> <li>• Child Support</li> <li>• Civil</li> <li>• Criminal</li> <li>• Domestic Violence</li> <li>• Emergency Order</li> <li>• Interim Order</li> <li>• Juvenile</li> <li>• Petition to Revoke Probation</li> <li>• Preliminary</li> </ul>	[Edit] [Delete]
NTA	Notice to Appear	Yes	<ul style="list-style-type: none"> <li>• Child Support</li> <li>• Civil</li> <li>• Criminal</li> <li>• Domestic Violence</li> <li>• Emergency Order</li> <li>• Extradition</li> <li>• Interim Order</li> <li>• Jury Trial</li> <li>• Juvenile</li> </ul>	[Edit] [Delete]
ORD	Order	Yes	<ul style="list-style-type: none"> <li>• Child Support</li> <li>• Civil</li> <li>• Criminal</li> <li>• Domestic Violence</li> </ul>	[Edit] [Delete]

Click on the individual tabs to access the different options. With the appropriate permissions, you can add, edit, and delete settings within each tab. While the data differs with each configuration option, the functionality remains consistent.

The **Court Paper Types** option is used for illustration purposes.

### ***Add Court Paper Type Code***

1. Click on the [Add Court Paper Type Code](#) link to display the *Court Paper Type Code* entry form.

Court Paper Type Code

**CODE**  
OP

**DESCRIPTION**  
Civil Protection Order

**ACTIVE**

**SUB-TYPES**  
\* Civil \* Domestic Violence

Close Save

2. Enter the **Code** and **Description**.
3. The **Active** box is checked by default. Deselecting this button allows you to save the information entered and activate the Court Paper Type at a later date.
4. Select all **Sub-Types** that apply.
5. Click **Save** to save the record and return to the *Product Configtable*., or click **Close** to cancel without saving.

### ***Edit Court Paper Type Code***

1. Locate the record you need to edit in the table.

2. Click  in the **Actions** column in the same row as the record listing to display the *Court Paper Type Code* page.
3. Make changes as needed.
4. Click **Save** to save changes and return to the *Product Config* table.

### Delete Court Paper Type Code

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Product Config* table.

## Civil Process Agency Settings

On the *Module Configuration* page click the Civil Process link with your agency's name in the description. For instructions on accessing the *Module Configuration* page refer to "Access Module Admin" on page 289.

Civil Process	Configure Civil Process for product and agency settings.
Civil Process	Configure Civil Process For Your Agency <b>District 42, Versailles</b>

The Configuration page appears.



Administration / Module Configuration / Civil Process Configuration

**Civil Process Agency Administration** Go Back

FEE COLLECTIONS ENABLED

Save

WOULD YOU LIKE TO ZERO OUT EXISTING COURT PAPER FEES?  
RUNNING THIS SCRIPT WILL ADD A FEE COLLECTION TO ALL EXISTING COURT PAPERS IN THE AMOUNT OF THE TOTAL FEES.

Zero Fees

WOULD YOU LIKE TO MANAGE COURT LOCATIONS AND RECEIVED FROM AGENCIES FOR DISTRICT 42, VERSAILLES AGENCY?

Manage Court Locations

Check the **Fee Collections** box to enable, or uncheck to disable, then click **Save**.

Click **Zero Fees** to zero out existing court paper fees.

Click **Manage Court Locations** to manage Court Locations. For detailed instructions refer to "Court Locations" on page 220.

Click the **Go Back** button on the upper right of the page to return to the *Module Configuration* page.

## Fleet Management Settings

Configuration options include the following:

- Equipment Types
- Vehicle Status, Vehicle Category, Vehicle Assignments, Vehicle Groups, Vehicle Repairs, and Vehicle Ratings
- Category Roles
- Misc IDs
- Vendors and Funding Vendors
- Service Request Types and Service Request Status
- Storage Locations
- Budget Codes
- Fuel Types and Fuel Payments
- Fluid Types
- Inspection Types and Inspection Status
- Insurance Claim Types
- Crash Hours Groups
- Crash Damage Codes
- Crash Cause Codes
- Crash Reference Types
- Crash Types Codes

To manage these options from the *Module Configuration* page, click the Fleet Management link. For instructions on accessing the *Module Configuration* page refer to "Access Module Admin" on page 289.

Fleet Management	Configure Fleet Management for product and agency settings.
Training	Configure Training.

The *Product Config* table opens with the configuration options in separate tabs across the top, resting on the **Equipment Types** tab by default.

The screenshot shows the 'Fleet Management Administration' page. At the top, there is a breadcrumb trail: 'Administration / Module Configuration / Fleet Management Configuration'. Below this is a 'Fleet Management Administration' header with a 'Go Back' button. A red arrow labeled 'Tabs' points to a row of configuration tabs: 'Equipment Types', 'Vehicle Status', 'Vehicle Category', 'Category Roles', 'Vehicle Assignments', 'Vehicle Groups', 'Misc IDs', and 'Vendors'. Below these are more tabs: 'Funding Vendors', 'Vehicle Repairs', 'Service Request Types', 'Service Request Status', 'Storage Locations', 'Budget Codes', and 'Vehicle Ratings'. Further down are 'Fuel Types', 'Fluid Types', 'Fuel Payments', 'Inspection Types', 'Inspection Status', 'Insurance Claim Types', and 'Crash Hours Groups'. At the bottom of the tabs are 'Crash Damage Codes', 'Crash Cause Codes', 'Crash Reference Types', and 'Crash Type Codes'. A '+ Add Equipment Type' button is located to the right of the tabs. Below the tabs is a table with the following data:

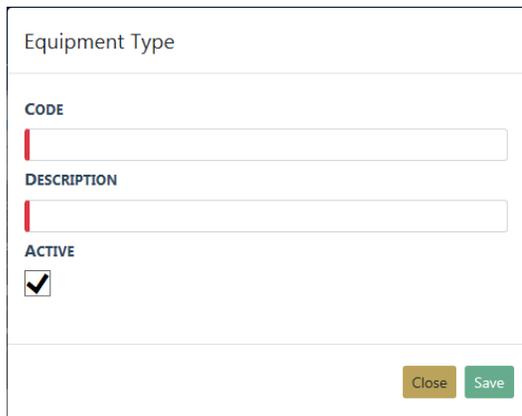
Code	Description	Active	Actions
EQTYPE_3	FIRST_AID_KIT	Yes	[Edit] [Delete]
EQTYPE_5	HANDCUFFS	Yes	[Edit] [Delete]
EQTYPE_1	RADAR	Yes	[Edit] [Delete]
EQTYPE_2	RADAR_GUN	Yes	[Edit] [Delete]
EQTYPE_4	SHOTGUN	Yes	[Edit] [Delete]
STAND_EQUIP	standalone equipment	Yes	[Edit] [Delete]

Click on the individual tabs to access the different options. With the appropriate permissions, you can add, edit, and delete settings within each tab. While the data differs with each configuration option, the functionality remains consistent.

The **Equipment Types** option is used for illustration purposes.

### Add Equipment Types

1. Click on the Add Equipment Type button to display the *Equipment Type* entry form.



Equipment Type

CODE

DESCRIPTION

ACTIVE

Close Save

2. Enter the **Code** and **Description**.
3. The **Active** box is active by default. Deselecting this button allows you to save the information entered and activate the Equipment Type at a later date.
4. Click **Save** to save the record and return to the *Product Config* table., or click **Close** to cancel without saving.

### ***Edit Equipment Types***

1. Locate the record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Equipment Type* page.
3. Make changes as needed.
4. Click **Save** to save changes and return to the *Product Config* table.

### ***Delete Equipment Types***

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Product Config* table.

## Training Settings and Configuration

Configuration options include the following:

- Course Templates
- Maintenance Settings (List courses and certifications that are about to expire within a set number of days)
- Course Types
- Course Classifications

To manage these options from the *Module Configuration* page, click the [Training](#) link. For instructions on accessing the *Module Configuration* page refer to "Access Module Admin" on page 289.

Fleet Management	Configure Fleet Management for product and agency settings.
Training	Configure Training.

For details on settings and configurations refer to "Training Module" on page 151.

# Chapter 17. Collapse Duplicate Master Indices

**Master Indices** are centralized pieces of data that are accessed from different modules of the system for consistency. Each index is represented only once, such as a person, address, vehicle, and organization. For example, all Caliber Public Safety Online RMS modules access the same person record for Joe Smith with SSN 123-12-1234 and the same vehicle record for VIN ABC1235223DE45455.

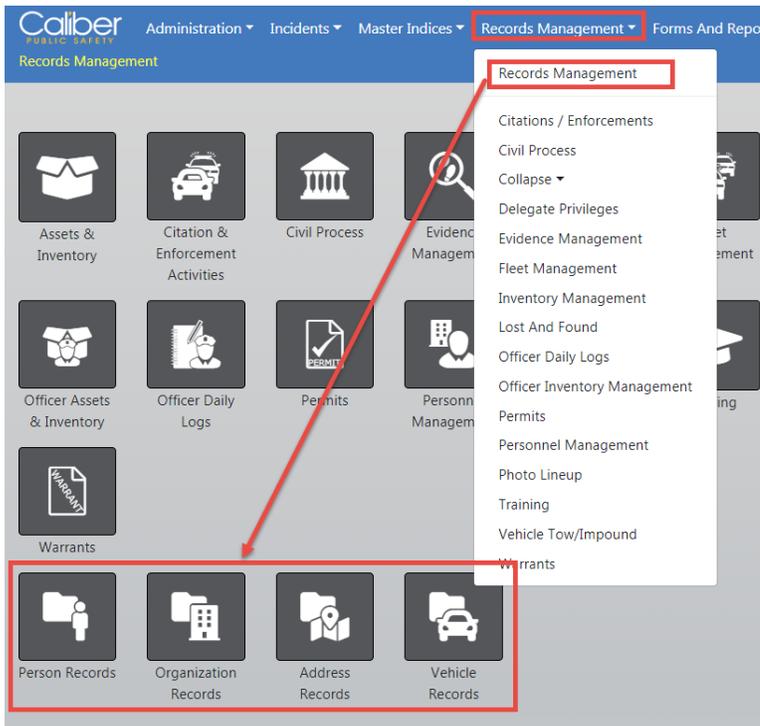
There may be times when users inadvertently create a duplicate master person, address, vehicle, or organization in Caliber Public Safety Online RMS. The agency administrator, with proper permissions, can identify and collapse duplicate records, creating one master person, address, or organization record.

## Access Collapse Process

There are two ways to access the **Collapse** process.

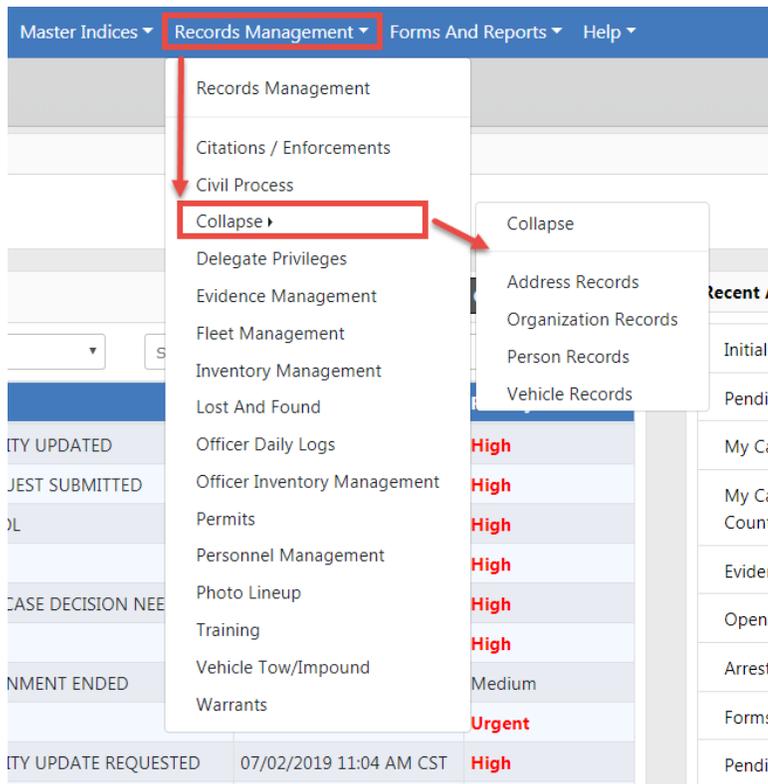
### Option 1

Click on the *Records Management* label and *Records Management* again, then click the appropriate icon that corresponds to the Master Index you want to collapse.



### Option 2

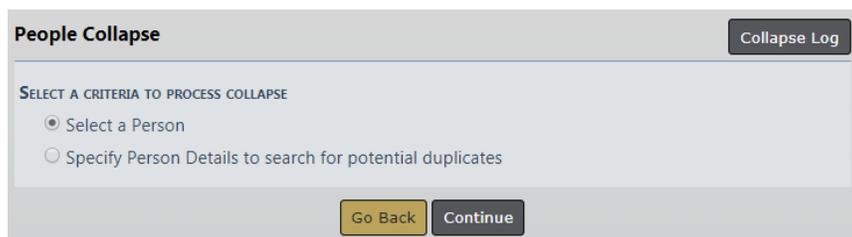
Select **Person Records**, **Address Records**, **Organization Records**, or **Vehicle Records** from the **Records Management** drop down menu.



## Search for Duplicate Master Indices

Use the following procedure to search for potential Master Index duplicate records. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization using different search criteria.

1. Access **Person Records** to open the *Select - Collapse Criteria* page to search for potential duplicates. (See "Access Collapse Process" on page 299, if needed.)



2. You must select one Master Person record as the *primary* record, and at least one Master Person record as the *duplicate*.

You can either manually search for and identify the duplicates, or you can let the system search for potential duplicates based on the search criteria you enter.

Select one option then follow the applicable steps below:

### **Select a Person**

- a. Select this option to manually search for and identify duplicates, then click **Continue** to open the *Master Index Search* page.

The screenshot shows a web form titled "Person" with a "Mug Shot Search - By Physical Description" button and an "Add Person" button. The form is organized into several sections:

- Personal Information:** LAST NAME (Clark), FIRST NAME, MIDDLE NAME.
- Identification:** TITLE (-Select-), DOB, AGE, RACE (-Select-), SEX (-Select-), INDEX ID.
- License Information:** DRIVERS LICENSE, DRIVERS LICENSE STATE (-Select-), SSN.
- Administrative:** NAME TYPE (-Select-), CREATOR.
- Search Parameters:** CREATION DATE FROM, CREATION DATE TO.
- Search Options:** PHONETIC, SOUNDEX, STATEWIDE SEARCH (dropdown arrow), SEARCH PREFERENCE (ALL, ANY).
- Additional Search Criteria:** - Select - (dropdown).
- Actions:** Search External Systems, Go Back, Reset, Search.

- b. Enter your search criteria then click **Search** to display the *Person Search Results*, then select the *Master Person* you want to use as the *primary* record.

Person Search Results Select one

Last Name	First Name	Middle Name	Title	Sex	Race	DOB	SSN	Misc ID	Name Type	Index ID	Actions
▲ Clark	Ranelle	Marie		F	W	03/16/1959	123-99-1234		Primary Name	1080	
▲ Clark	Ranelle			F	W	03/16/2010		t12344aa10	Primary Name	1082	
CLARK	WILLIAM	RAY		M	W	07/18/1973	111-30-1750	2102131	Primary Name	405	

- c. The *Person Collapse* page opens with the selected Master Person record listed as the *Primary Person*. Click the **two-arrow** icon in the *Actions* column to select a different primary person record if necessary.

Person Collapse Go Back Exit

**Primary Person Details**

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State Police	

**Primary Filters** Click to change primary person

LAST NAME  FIRST NAME  MIDDLE NAME

**Optional Filters**

RACE  SEX  DOB  SSN  DL #  CREATOR AGENCY

Search Matches

**Duplicates To Be Collapsed** Add Duplicate Person

Any undesired records should be removed from this list before collapse.

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
No data available in table											

Showing 0 to 0 of 0 entries

Next

Hover your mouse over the **blue information bubble** to view detailed information about the Master Person record.

Person Collapse

**Primary Person Details**

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State	

**Primary Person Details**

LAST NAME	FIRST NAME	MIDDLE NAME	DOB	SEX	RACE
Clark	Ranelle	Marie	03/16/1959 (Age: 60)	Female	White
SSN	ADDRESS (RESIDENCE)		INDEX ID		
123-99-1234	6081 East 82nd Street #415 INDIANAPOLIS, IN 46250		1080		

- d. You can search for the duplicate Master Person record by selecting specific **Filters** that match with the primary person, or click the **Add Duplicate Person** link to manually search for a specific Master Person record using your own search criteria.

As a **Filter** example, select the **Last Name** and **First Name** filter buttons to search for other Master Person records that share the same last and first name as the Primary Person, then click **Search Matches** to display a list of potential duplicates. Buttons turn green when selected and those that have not been selected are gray.

- e. Click the select icon  in the *Actions* column to select the *New Primary Person Record*.

**Duplicates To Be Collapsed** ➕ Add Duplicate Person

*Any undesired records should be removed from this list before collapse.*

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1082	Clark	Ranelle		White		Female	03/16/2010		T12344AA10	Indiana State Police	  

**Specify Person Details to Search for Potential Duplicates**

- a. Select this option to let the system search for potential duplicates based on the selected **Filters**, then click **Continue** to open the *Search Person Matches* page.

[Go Back](#)

**Primary Filters**

LAST NAME <input type="checkbox"/>	FIRST NAME <input type="checkbox"/>	MIDDLE NAME <input type="checkbox"/>
---------------------------------------	----------------------------------------	-----------------------------------------

**Optional Filters**

RACE <input type="checkbox"/>	SEX <input type="checkbox"/>	DOB <input type="checkbox"/>
SSN <input type="checkbox"/>	DL # <input type="checkbox"/>	CREATOR AGENCY <input type="checkbox"/>
CREATOR DATE FROM <input type="text"/>	CREATOR DATE TO <input type="text"/>	

[Go Back](#)   [Search](#)

**Potential Duplicate Groups**

Show  entries [Previous](#) [Next](#)

Showing 0 to 0 of 0 entries

Last Name	First Name	Middle Name	Race	Sex	DOB	SSN	DL #	Creator Agency	#Possible Matches	Actions
No data available in table										

Showing 0 to 0 of 0 entries [Previous](#) [Next](#)

- b. Select the **Filters** that apply to your search, then click **Search** to display a list of *Potential Duplicate Groups*.

For example, select **Last Name**, **First Name**, and **Sex** to search for all Master Person records that contain the same last name, first name, and sex.

[Go Back](#)

**Primary Filters**

LAST NAME     FIRST NAME     MIDDLE NAME

**Optional Filters**

RACE     SEX     DOB

SSN     DL #     CREATOR AGENCY

CREATOR DATE FROM      CREATOR DATE TO

[Go Back](#)    [Search](#)

**Potential Duplicate Groups**

Show  entries    [Previous](#)    [1](#)    [2](#)    [3](#)    [Next](#)

Showing 1 to 25 of 51 entries

Last Name	First Name	Middle Name	Race	Sex	DOB	SSN	DL #	Creator Agency	#Possible Matches	Actions
ALLEN	DONALD			M					2	
BECKER	CHRISTOPHER			M					2	
BECKER	CHRISTOPHER			U					3	
BEERTZER	HANK			M					4	
BUSCHEMY	STEVE			M					6	
CLARK	RANELLE			F					2	

**Two records found** →

- c. Click the select icon in the *Actions* column to select the Group you want to collapse.
- d. The *Person Collapse* form appears displaying the two matching Master Person Index records under the *Duplicates To Be Collapsed* section.

Go Back Exit

**Person Collapse**

**Primary Person Details**

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
Please select a primary person from the list of duplicates below.											

**Primary Filters**

LAST NAME	FIRST NAME	MIDDLE NAME
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Optional Filters**

RACE	SEX	DOB	SSN	DL #	CREATOR AGENCY
<input type="checkbox"/>					

Search Matches

**Duplicates To Be Collapsed** [Add Duplicate Person](#)

Any undesired records should be removed from this list before collapse.

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State Police	<input type="checkbox"/> <input type="checkbox"/>
1133	Clark	Ranelle		White		Female	03/16/2010		T12344AA10	Indiana State Police	<input type="checkbox"/> <input type="checkbox"/>

Showing 1 to 2 of 2 entries

Next

- e. Optionally click the **Add Duplicate Person** link to search for and add another Master Person to the *Duplicates To Be Collapsed* list
  - f. Click the select icon  in the *Actions* column on the record you want to use as the Primary Person. Hover your mouse over the hand icon to display the Make Primary Person message.
- Note:** You must select one Primary Person to continue the collapse process.
- g. The selected duplicate record moves from the *Duplicate To Be Collapsed* section to the *Primary Person Details* section. This primary person record becomes the only Master Person Index record after the collapse process finishes.

**Person Collapse** Go Back Exit

**Primary Person Details**

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State Police	

**Primary Filters**

LAST NAME  FIRST NAME  MIDDLE NAME

**Optional Filters**

RACE  SEX  DOB  SSN  DL #  CREATOR AGENCY

**Duplicates To Be Collapsed** ➕ Add Duplicate Person

**Any undesired records should be removed from this list before collapse.**

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1133	Clark	Ranelle		White		Female	03/16/2010		T12344AA10	Indiana State Police	<input type="checkbox"/> <input type="button" value="Not Duplicate"/> <input type="button" value="Delete"/>

Showing 1 to 1 of 1 entries Next

- h. Click on the delete icon to remove records from the *Duplicates To Be Collapsed* list that should not be included in the collapse process, or click the not duplicate icon to flag the record as *Not Duplicate* and enter a comment as to why it is not considered a duplicate. Both methods remove the record from the *Duplicates To Be Collapsed* list.
3. Click **Next** to run the collapse process. For more information about running the collapse process refer to "Run Collapse Process" below for instructions on collapsing Primary and Duplicate Master Index Records into one Master Record.

**Note:** Before running the collapse process, double check the *Duplicates To Be Collapsed* list to ensure the only records that appear are those you want to collapse with the *Primary Person* record

## Run Collapse Process

Use the following procedure to collapse Primary and Duplicate Master Index records into one Master Record. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization using different criteria.

1. Select the Primary and Duplicate Master Person Index records to collapse. (For more information on accessing the collapse process and searching for duplicates see "Access Collapse Process" on page 299 and "Search for Duplicate Master Indices" on page 301, respectively.)

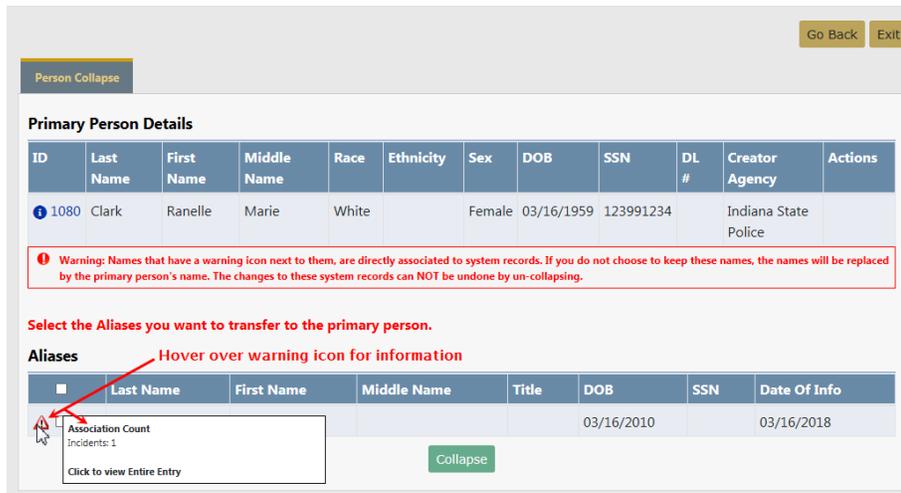
The screenshot shows the 'Person Collapse' interface. At the top right, there are 'Go Back' and 'Exit' buttons. Below that is a 'Person Collapse' header. The main content is divided into three sections:

- Primary Person Details:** A table with columns: ID, Last Name, First Name, Middle Name, Race, Ethnicity, Sex, DOB, SSN, DL #, Creator Agency, and Actions. A single record is shown: ID 1080, Last Name Clark, First Name Ranelle, Middle Name Marie, Race White, Ethnicity, Sex Female, DOB 03/16/1959, SSN 123991234, DL #, Creator Agency Indiana State Police, and an Actions column with a collapse icon.
- Primary Filters:** A section with checkboxes for filtering. Under 'LAST NAME', 'FIRST NAME', and 'MIDDLE NAME', there are checkboxes. 'LAST NAME' and 'FIRST NAME' are checked. Under 'Optional Filters', there are checkboxes for RACE, SEX, DOB, SSN, DL #, and CREATOR AGENCY, all of which are currently unchecked. A 'Search Matches' button is located below these filters.
- Duplicates To Be Collapsed:** A section with a warning message: 'Any undesired records should be removed from this list before collapse.' Below this is a table with columns: ID, Last Name, First Name, Middle Name, Race, Ethnicity, Sex, DOB, SSN, DL #, Creator Agency, and Actions. A single record is shown: ID 1082, Last Name Clark, First Name Ranelle, Middle Name, Race White, Ethnicity, Sex Female, DOB 03/16/2010, SSN, DL # T12344AA10, Creator Agency Indiana State Police, and an Actions column with a collapse icon, a red triangle warning icon, and a delete icon. Below the table, it says 'Showing 1 to 1 of 1 entries' and a 'Next' button.

**Note:** You must select one Primary Person and at least one Duplicate to run the collapse process.

2. Double check the *Duplicates To Be Collapsed* list to ensure the only records that appear are those you want to collapse with the *Primary Person* record; remove any that should not be included.
3. Click **Next**
4. A warning message appears when the duplicate record is associated with other records in the system such as, incidents, arrests, etc. Hover the mouse over the **red triangle** for a summary of the associations.

In the example below, the duplicate person is associated with one incident.



5. **Select** the box to the left of the person you want to transfer to the primary person.



6. Click the **Collapse** button to continue with the collapse process, click **Exit** to abort without collapsing, or click **Go Back** to return to the *Person Collapse* screen.

By choosing **Collapse**, the name on the associated records becomes the primary person name.

7. A warning and comment box appears. Enter a **Comment** and click **Save** to continue the collapse process, or click **Cancel** to abort without collapsing.

Collapse People

**Warning: All Duplicates selected will be collapsed into the selected primary Person.**

**COMMENTS**

8. The *Person Collapse* screen appears when the Collapse process is complete.

Perform Another Task Exit

Person Collapse

**Primary Person Details**

<b>LAST NAME</b>	<b>FIRST NAME</b>	<b>MIDDLE NAME</b>	<b>DOB</b>	<b>SEX</b>	<b>RACE</b>
Clark	Ranelle	Marie	03/16/1959 <small>(Age: 59)</small>	Female	White
<b>DRIVER'S LICENSE #</b>	<b>DRIVER'S LICENSE STATE</b>	<b>SSN</b>	<b>ALIASES</b>		
T12344AA10	Indiana	123-99-1234	Ranelle Clark(Alias)		
<b>ADDRESS (RESIDENCE)</b>			<b>INDEX ID</b>		
6081 East 82nd Street #415 INDIANAPOLIS, IN 46250			1080		

Edit Person

Click **Perform Another Task** to Collapse other records, click the **Edit Person** link to edit the person details, or click **Exit**.

9. Data is collected and logged during the collapse process for auditing and tracking purposes. The *Collapse Log* also provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

For more information about the *Collapse Log* or the *UnCollapse* process, refer to "Collapse Log" below.

## Collapse Log

Basic Master Index data is collected and logged during the collapse process for auditing and tracking purposes. The *Collapse Log* also provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

The Collapse Date, Collapsed By, Master Index Name and other information depending on the Master Index are tracked in the *Collapse Log*. For example, for the Master Person Index, Race, Sex, DOB, SSN, and Driver's License Number of both the Primary and Duplicate Person records are logged.

Use the following procedure to access the *Collapse Log*. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization.

1. Access the **Collapse** process through the *Records Management* menu, then select *Person Records* for Master Person. For more information on accessing the **Collapse** process refer to "Access Collapse Process" on page 299.
2. Click the **Collapse Log** button to open the *Person Collapse Log*.

**People Collapse** Collapse Log

SELECT A CRITERIA TO PROCESS COLLAPSE

Select a Person

Specify Person Details to search for potential duplicates

Go Back
Continue

Go Back

SEARCH SEARCH BY

Enter search text Search By

Reset
Search

Collapse Date/Time	Collapse By	Index ID	Person Summary	Actions
2019-03-04 12:30:53.0	CSAUR	1080	CLARK RANELLE MARIE <b>RACE:</b> White <b>DOB:</b> 1959-03-16 00:00:00.0 <b>SSN:</b> 123991234 <b>DL #:</b> T12344AA10	
2018-03-07 11:55:36.0	STATE_OFFICER11	1070	HARRIS AVERY MARIE <b>RACE:</b> White <b>DL #:</b> 12345	
2018-02-26 16:07:51.0	STATE_OFFICER11	740	BRANSON ROBERT <b>RACE:</b> White <b>DOB:</b> 1972-10-24 00:00:00.0 <b>SSN:</b> 123456789 <b>DL #:</b> CO11111	
2017-08-24 11:15:24.0	STATE_OFFICER11	932	WHITE SAM PERSON01 <b>RACE:</b> Asian <b>DOB:</b> 1980-06-01 00:00:00.0	
2017-06-29 12:59:03.0	STATE_OFFICER11	908	BROWN CHARLIE SNOOPS <b>RACE:</b> White	
2017-06-06 13:34:23.0	STATE_OFFICER11	910	ZEDILLO REALLY REALLY REALLY LONG LAST NAME ERNESTO EXTREMELY MUCHO LONG FIRST NAME LONG MIDDLE NAME <b>RACE:</b> Native Hawaiian or Other Pacific Islander <b>DOB:</b> 1980-10-10 00:00:00.0 <b>SSN:</b> 222444556 <b>DL #:</b> MX1234568	
2016-10-31 13:11:03.0	TSTC	719	KID BILL TEH <b>RACE:</b> White	

3. Optionally click the **Index ID** link to open the *View Person* screen.

Collapse Date/Time	Collapse By	Index ID	Person Summary	Actions
2019-03-04 12:30:53.0	CSAUR	1080	CLARK RANELLE MARIE <b>RACE:</b> White <b>DOB:</b> 1959-03-16 00:00:00.0 <b>SSN:</b> 123991234 <b>DL #:</b> T12344AA10	

Go Back Print Report Visualization Tool Update Details Subscribe

**Person Details** **Person Summary**

**INDEX ID**  
1080

LAST NAME Clark	FIRST NAME Ranelle	MIDDLE NAME Marie
TITLE	DOB 03/16/1959	SSN 123-99-1234
SEX Female	RACE White	ETHNICITY
DRIVERS LICENSE	DRIVERS LICENSE STATE	
RESIDENCE PHONE ..	CELL PHONE ..	RESIDENCE ADDRESS 6081 East 82nd Street #415 INDIANAPOLIS, IN 46250

**Aliases**

Last Name	First name	Middle	Title	DOB	SSN	Type	Date Of Info
Clark	Ranelle	Marie		03/16/1959	123-99-1234	Primary Name	07/12/2018
Clark	Ranelle			03/16/2010		Alias	03/16/2018

**Addresses**

Address	Type	Occupied	Comments	Date of Info
6081 East 82nd Street #415 INDIANAPOLIS, IN 46250	Residence	-		07/12/2018

**Identification**

ID Number	ID Type	Classes / Restrictions	State	Country	Date of Issue	Expire Date	Description	Date of Info
T12344AA10	OLN		Indiana					07/13/2018

Go Back Print Report Visualization Tool Update Details Subscribe

**Total Involvements**

Incidents	07/17/2018	2
CourtPapers	06/18/2017	1
CallsForService	03/16/2018	1

**Incident By Role**

Offender	2
----------	---

**Common Event Associations**

Address	1
Organization	1
Person	1

**By Offense Category**

Property	1
Person	1
Vehicle	1
Society	1

**By Incident Status**

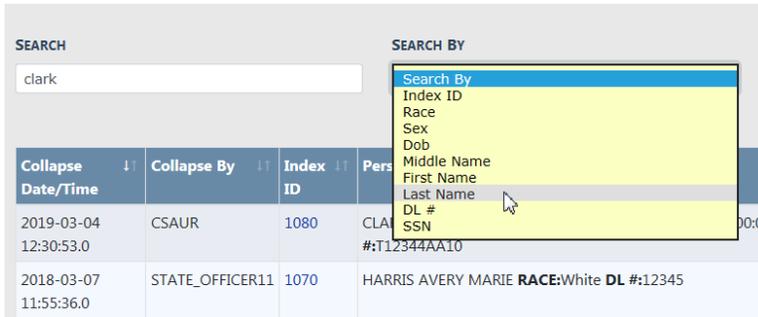
Initial Report	2
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For instructions on using the *View Person* screen refer to the *Caliber Online RMS User Guide*.

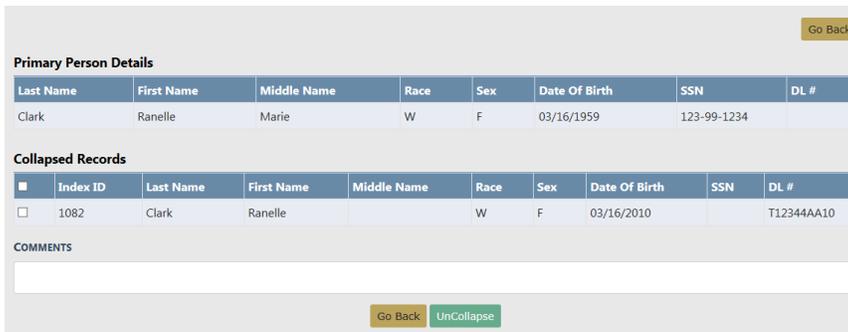
Click the **Go Back** button to return to the *Person Collapse Log*.

- Optionally search for specific records.

Enter your search criteria in the **Search** text box and select the type of data you want to **Search By**, then click the **Search** button.



- Optionally click the **Select** icon  in the *Actions* column to open the *Person Collapse* screen to view the details of the collapsed data.



**Note:** The **UnCollapse** button provides a way to reverse the results of the collapse process. For instructions on using the UnCollapse button refer to "UnCollapse Master Index" below.

6. Click **Go Back** to return to the *Person Collapse Log*.

## UnCollapse Master Index

The *Collapse Log* provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

Use the following procedure to uncollapse a Master Index record. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization.

1. Access the **Collapse Log** through the *Records Management* menu, then select *Person Records* for Master Person. For more information on accessing the **Collapse Log** refer to "Collapse Log" on page 311.
2. Identify the collapsed record you want to uncollapse, then click on the **View** icon in the *Actions* column to open the *Person Collapse* screen.

Collapse Date/Time	Collapse By	Index ID	Person Summary	Actions
2019-03-04 12:30:53.0	CSAUR	1080	CLARK RANELLE MARIE RACE:White DOB:1959-03-16 00:00:00.0 SSN:123991234 DL #T12344AA10	

[Go Back](#)

**Primary Person Details**

Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
Clark	Ranelle	Marie	W	F	03/16/1959	123-99-1234	

**Collapsed Records**

<input type="checkbox"/>	Index ID	Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
<input type="checkbox"/>	1082	Clark	Ranelle		W	F	03/16/2010		T12344AA10

COMMENTS

[Go Back](#)
[UnCollapse](#)

3. Select the **Collapsed Records** you want to uncollapse from the Primary Person and enter any **Comments**.

[Go Back](#)

**Primary Person Details**

Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
Clark	Ranelle	Marie	W	F	03/16/1959	123-99-1234	

---

**Collapsed Records**

<input type="checkbox"/>	Index ID	Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
<input checked="" type="checkbox"/>	1082	Clark	Ranelle		W	F	03/16/2010		T12344AA10

**COMMENTS**

Collapsed in error.

[Go Back](#)
[UnCollapse](#)

4. Click the **UnCollapse** button to process your request.

Several events occurred as a result of the uncollapse process:

- The primary and duplicate persons are once again separate Master Person records.
- The name on all associated records (i.e., incidents, arrests, etc.) are back to the original pre-collapse state.
- The *Person Collapse Log* entry has been removed.

[Go Back](#)

**SEARCH**                      **SEARCH BY**

clark                      Last Name ▾

[Reset](#)   [Search](#)

No Collapse Logs Found

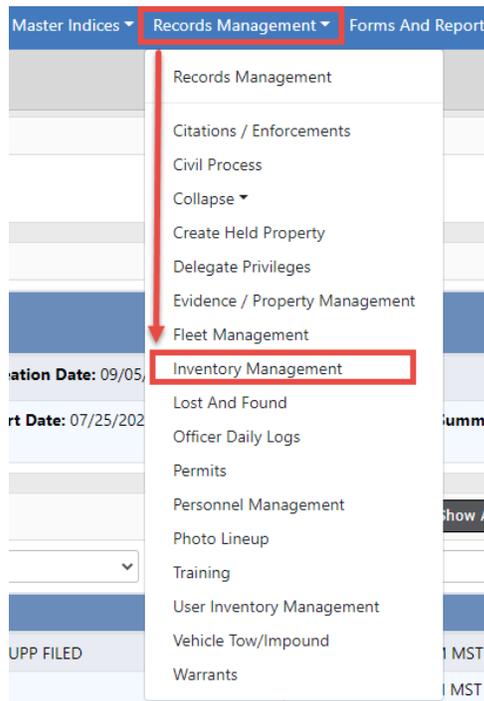


# Chapter 18. Inventory Administration

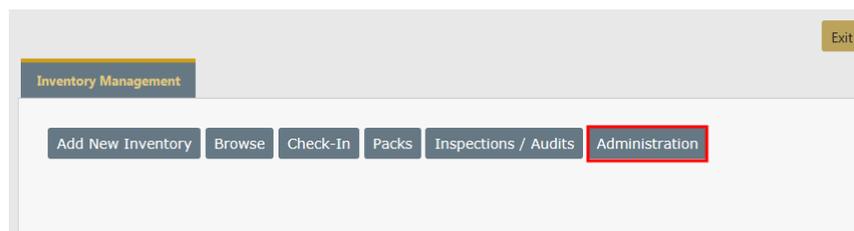
**Inventory Administration** allows users with proper permissions to configure and maintain settings for office supplies, fixed assets, weapons, equipment, vendor list, locations with assigned managers, clothing, and others.

## Access Inventory Administration

Click on the **Records Management** label then click on **User Inventory Management**.



Click the **Administration** button to open the **Inventory Administration** page containing up to four tabs depending on your agency setup.

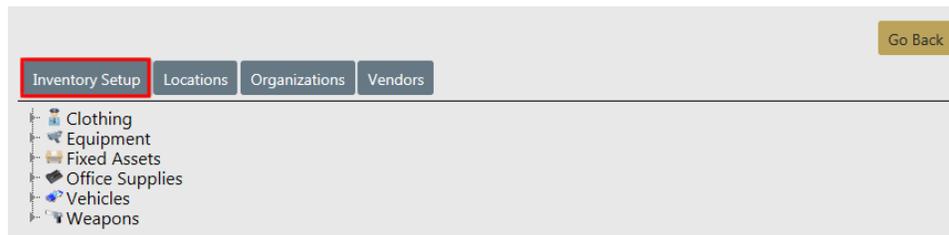




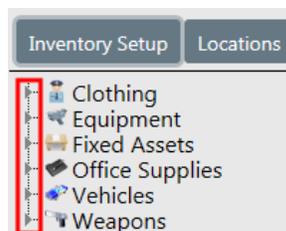
- Inventory Setup
- Locations
- Organizations
- Vendors

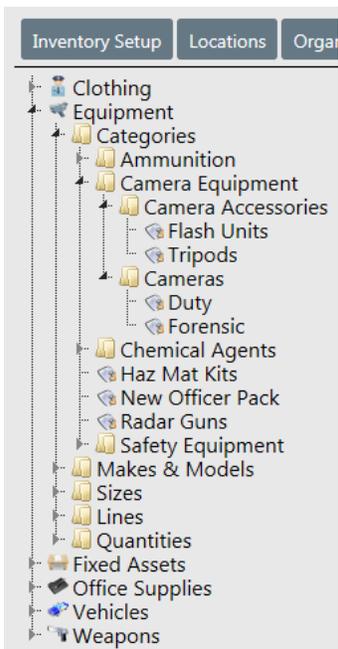
## Inventory Setup

The *Inventory Setup* tab of the **Inventory Administration** page contains configuration settings of clothing, equipment, fixed assets, office supplies, vehicles, and weapons.



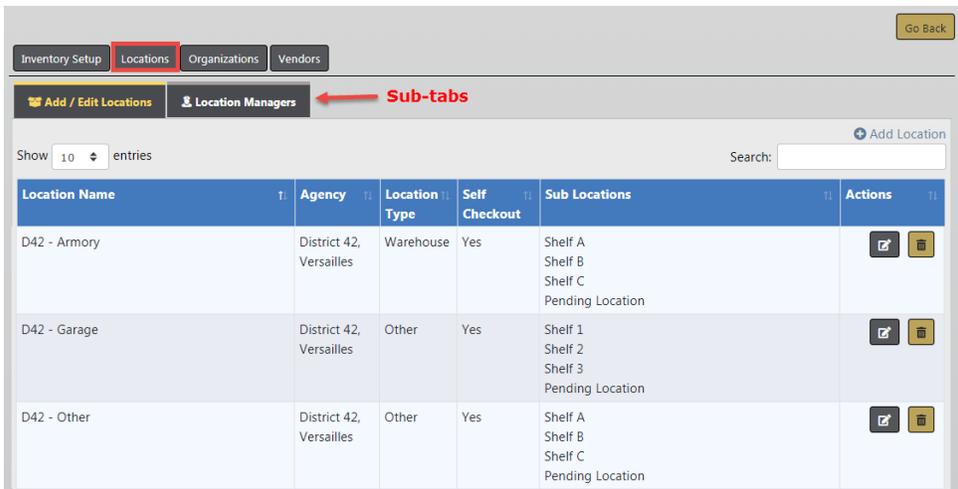
To the left of each category is a sideways **funnel**. Click on the **funnel** to drill-down for sub-categories, and sub-categories may also have funnels. You can keep drilling-down until no more funnels appear.





## Locations

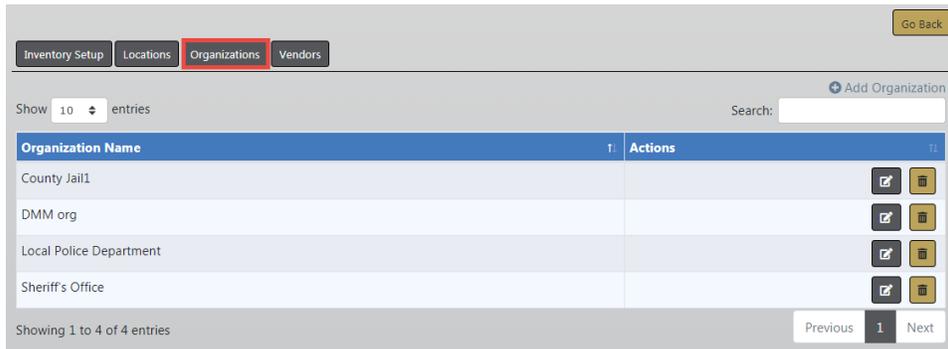
The *Location* tab of the **Inventory Administration** page contains configuration settings for various types of locations such as a warehouse, closets, rooms, parking lots, and managers assigned to the locations.



There are two sub-tabs, *Add/Edit Locations* and *Location Managers*. Locations are configured and managed through the *Add/Edit Location* tab and managers are assigned to locations through the *Location Managers* tab.

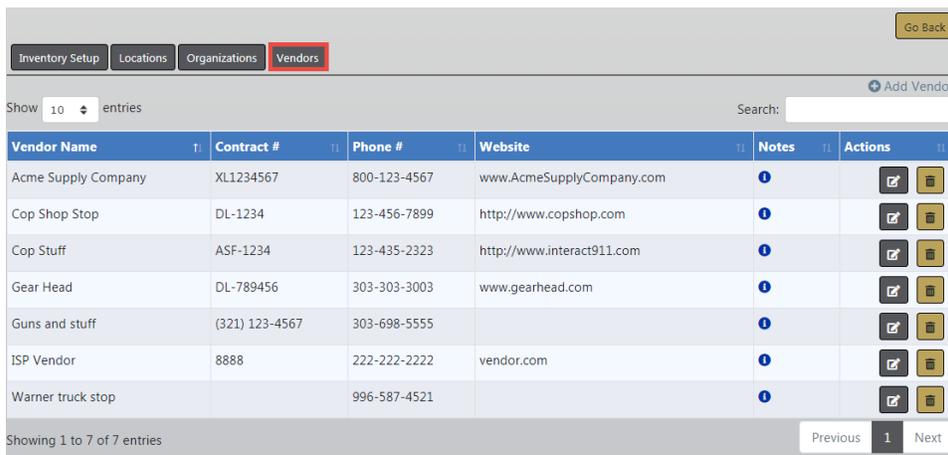
# Organizations

The *Organizations* tab of the **Inventory Administration** page contains organization configuration settings, particularly useful for multi-agency users.

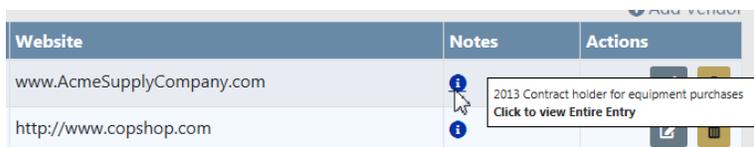


# Vendors

The *Vendors* tab of the **Inventory Administration** page contains vendor configuration settings.



Hover your mouse over the blue information bubble to view a portion of a note entry that is associated with the vendor record, or click the blue information bubble to view the entire note entry.



# Chapter 19. Reports

Online RMS reports consist of five report types: Ad Hoc, Custom Field, Custom Form, and Standard Menu.

- Ad-Hoc reports are created via Jasper Reports or iReports. Once a user with the appropriate permissions has created and saved ad hoc reports, other users within the agency/schema who have been the appropriate roles/permissions, can then use them.

**Note:** iReport allows for a detailed and specific set of design options. A user who wants to alter the form beyond the capabilities of the Custom Form Designer would do so in iReport. They can download the template, make the changes in iReport, then re-upload it here. This will require the user to know how to use iReport.

- Custom field reports are built from user-defined fields that have custom labels.
- Custom forms reports are based on an agency's needs and are designed to gather specific information to meet those needs.
- Standard menu reports are those that are delivered with the system. They are basic, out-of-the-box reports for statistics and such.

For information on how basic users access and use the various RMS reports, refer to the *Caliber Online RMS*.

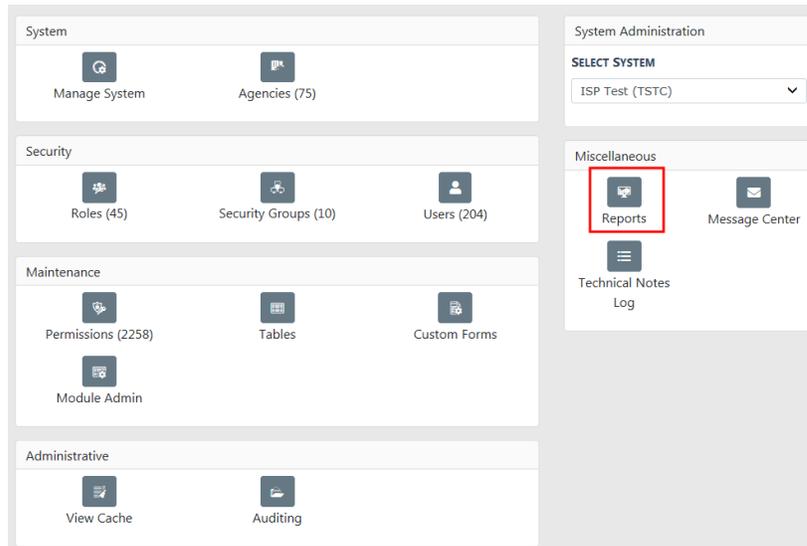
## Report Administration

The *Report Administration* page provides administrators ways to manage the various reports.

**Note:** For information on how basic users access and use the various RMS reports, refer to the *Caliber Online RMS User Guide*. The **Forms And Reports** menu provides access to existing reports.

You can access, add, and update reports from the *Report Administration* page.

From the *Home* page, click the **Administration** menu label to open the *Administration Home* page, then click on the **Reports** icon to display the *Report Administration* page. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.



The screenshot shows the Report List page with a table of reports. The table has the following columns: Name, Type, Category, Valid, and Actions. The table contains 10 rows of reports, and the page shows 1 to 10 of 172 entries.

Name	Type	Category	Valid	Actions
User Roster Report	Standard Menu Report	User	Yes	
Ticket Ledger Report	Standard Menu Report	Citations	Yes	
Law Enforcement Officers Killed or Assaulted (LEOKA)	Standard Menu Report	UCR	Yes	
Supplementary Homicide	Standard Menu Report	UCR	Yes	
Persons Arrested - Juveniles	Standard Menu Report	UCR	Yes	
UCR Hate Crime Report	Standard Menu Report	Statistical	Yes	
UCR Age, Sex, and Race Persons Arrested - Adult Report	Standard Menu Report	Statistical	Yes	
Arrest Codes Report	Standard Menu Report	Incidents	Yes	
Maryland Domestic Violence Form9	Standard Menu Report	UCR	Yes	
Human Trafficking	Standard Menu Report	UCR	Yes	

Showing 1 to 10 of 172 entries

This page displays both custom created reports and product reports.

To edit a product report, click the edit icon  to display an *Edit Report* page. Here, you can change the report name, category, description, agencies if applicable, and roles. In addition, Operations can control who has access to which reports.

## Ad Hoc Reports

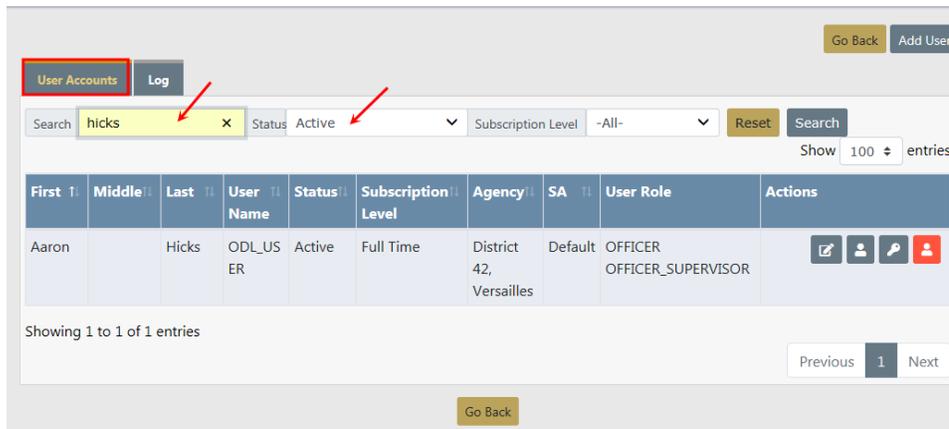
As the name implies, an ad hoc report is one created for a specific purpose. Online RMS agencies can create reports that perform specific functions within their agencies. To create ad hoc reports, a user (sometimes referred to as a *superuser*) must have the appropriate permissions and have access to the Jasper Server.

## Ad Hoc Tool Access

For a user to access the Open Ad Hoc Tool, an agency administrator must set up that user with the appropriate access permissions.

Use the following procedure to set up ad hoc tool access.

1. From the *Home* page, open the **Administration** menu then click on **Users** to open the *Manage Users* page. The page opens to the *User Accounts* tab by default. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.
2. Use the **Search** fields to locate the user by typing a search parameter in the **Search** field, in the **Status** field select *Active*, then click the **Search** button to display a list of users that match your criteria.



3. Click in the **Actions** column in the same row as the user's name to open the user's profile page as shown.

County	Agency	Date Created	Date Disabled	Default	Disabled
ISP Test (TSTC)	District 42, Versailles	03/06/2017		<input checked="" type="radio"/>	<input type="checkbox"/>

4. Click the **Security Settings** tab.

5. Click into the **Roles** field and select *AGENCY\_AD\_HOC\_REPORTING\_TOOL* from the list.

6. Click **Save** to save the change.

# Ad-Hoc Reporting

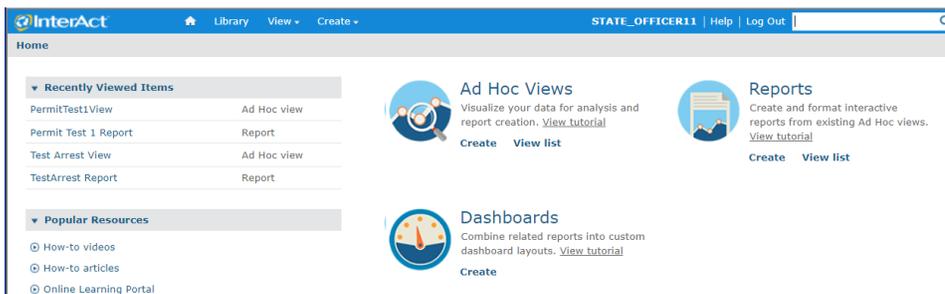
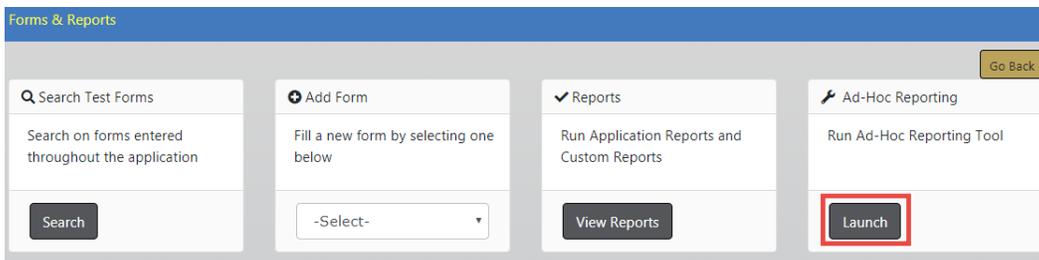
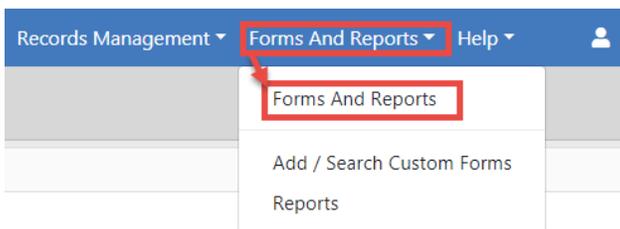
With appropriate permissions you can create Ad-Hoc reports and, using the Repository, you can group them into custom categories or topics.

## Create an Ad-Hoc Report

The following example steps you through the process to create an Ad-Hoc report and group by reporting areas.

Use the following procedure to select an ad-hoc topic that contains the **Reporting Area** field.

1. From the *Forms and Reports* page, click the **Launch** button under the Ad-Hoc Reporting section.

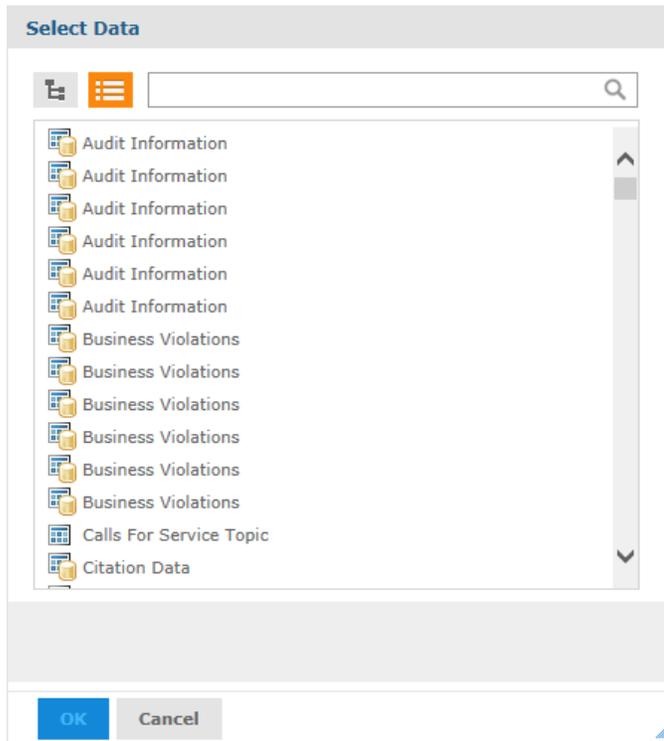


2. Click **Create** under Ad Hoc Views to open the *Select Data* window.

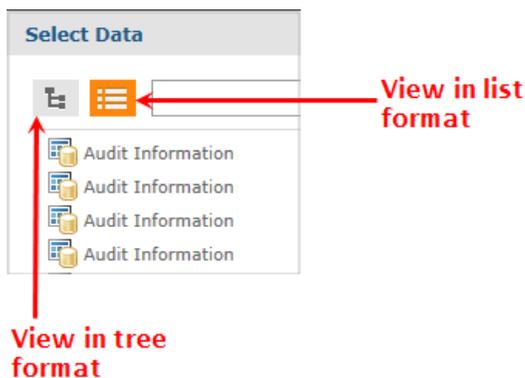


**Ad Hoc Views**  
 Visualize your data for analysis and report creation. [View tutorial](#)

**Create** **View list**



Click on the appropriate icon to view the source in *Tree* format or in *List* format, respectively. The *List* format is selected by default.

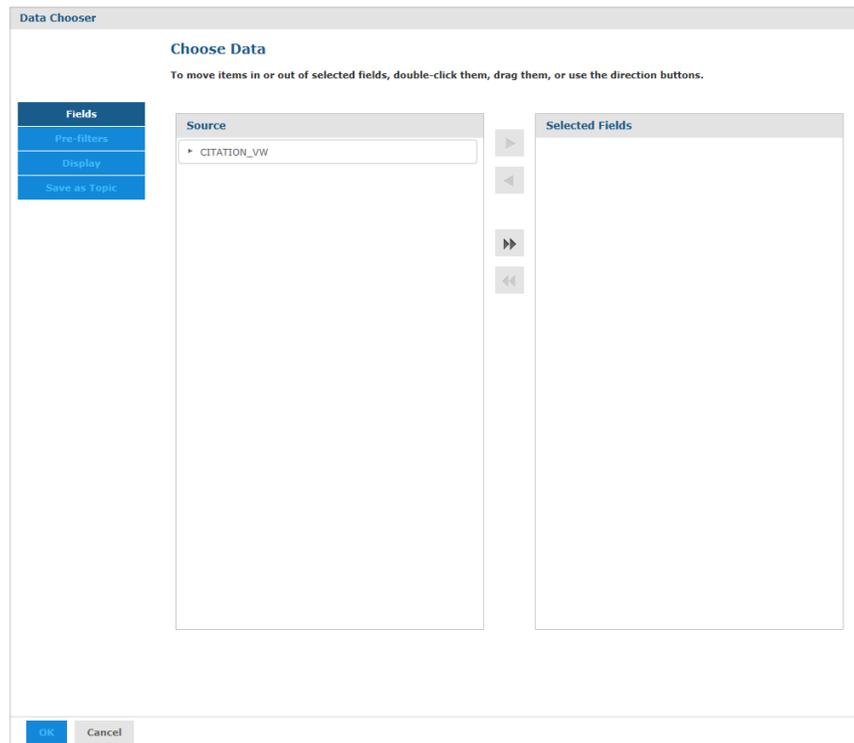


3. To choose using the *Tree* format:
  - a. Click **+** to the left of the **Public** folder to open the folder.
  - b. Click **+** to the left of **Ad Hoc Components**.

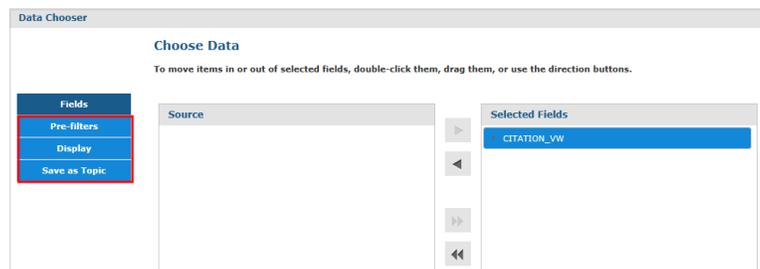
- c. Click **+** to the left of **Topics**.
- d. Select a topic.

**Note:** The following topics have been modified as follows:

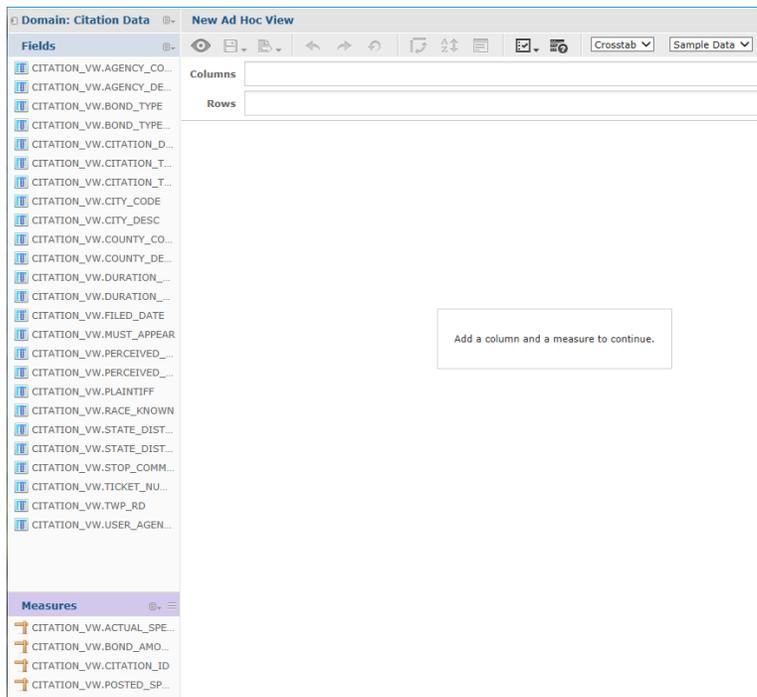
- Calls for Service Topic has been modified as follows:  
BEAT and SUB\_BEAT is labeled Reporting Area.  
Officer Information is labeled Primary Officer.
  - Evidence Topic has the additional fields: Property Summary, Location Remarks, Reporting Area, and Status description.
  - Field Arrest Charges Topic has the additional fields: Person Summary, Address Summary, Impound ID, Vehicle Seized, Vehicle Stored, Currency Seized, Currency Total, Discharge Date, Status Code, Status (to reference new columns), Case Number, Reporting Area, Longitude, and Latitude.
  - Field Arrest Topic has the same additional fields as the Field Arrest Charges Topic (see above).
  - Field Contact Topic has the additional fields: Notes, Address, Location Reporting Area and general summary information for Officer, Gang, Person, Organization and Vehicle.
  - Incident Topic has the additional fields: Status (description), Address (summary), Reporting Area, Incident NIBR City, Incident County, Incident Township.
  - Incident Offender Evidence Topic has the additional fields: Property Summary, Status (description), Address (summary), Location Remarks, Reporting Area, Location Agency, Incident NIBR City, Incident County, Incident Township.
4. To choose using the *List* format:
    - a. Scroll down and click on the source you want, then click the **Choose Data...** button to open the *Data Chooser* page.



- b. Click on items under the *Source* section then click the **right arrow** to move them into the *Selected Fields* section. Or **double-click** on selected *Source* items to move them automatically into the *Selected Fields* section.
- c. The **Pre-Filters**, **Display**, and **Save as Topic** buttons on the left become active. Click through each button to define the report.

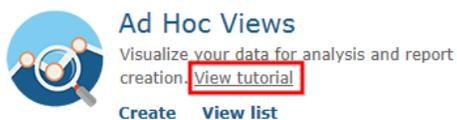


- **Pre-Filters:** Create filters to limit the data available in the editor. For example, you can limit the report to list citations with a specific citation type.
  - **Display:** Change the display name for fields, re-order fields, and choose whether the fields are listed in groups or not.
  - **Save as Topic:** Save the topic for later use.
5. Click **OK** to open the *New Ad Hoc View* page.



6. Click on titles on the left and drag and drop them into the Columns and Rows fields on the upper right.
7. Give your report a title in the designated text box.
8. Use the tool bar to apply other functions. Hover your mouse over each icon on the tool bar for a description of its function.

For more information on Ad Hoc Views, click on the [View Tutorial](#) link.

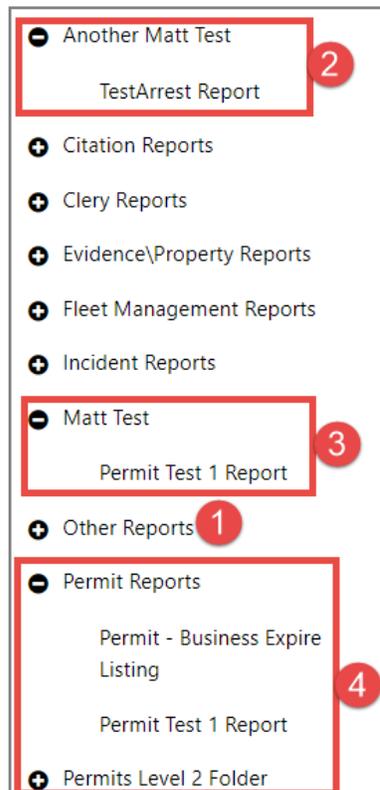


## Group Ad-Hoc Reports using the Repository

With Online RMS 11.7.0 and above, you can add folders, or categories, to the report repository to better group your Ad-Hoc reports. Previously, all new Ad-Hoc reports were grouped under *Other Reports* automatically for the users who have permissions to run reports.

The example below illustrates how Ad-Hoc reports can reside in their own categories, separate from *Other Reports*.

### ***Menu for users with permissions to run reports***



Numbers 2, 3, 4 in the above example contains Ad-Hoc reports that have been categorized outside of *Other Reports* (number 1).

Before Online RMS 11.7.0, Ad-Hoc reports would all reside under the *Other Reports* category. To create new categories, see "To Create new categories" below.

For more information on how users run reports, refer to the *Caliber Online RMS User Guide*.

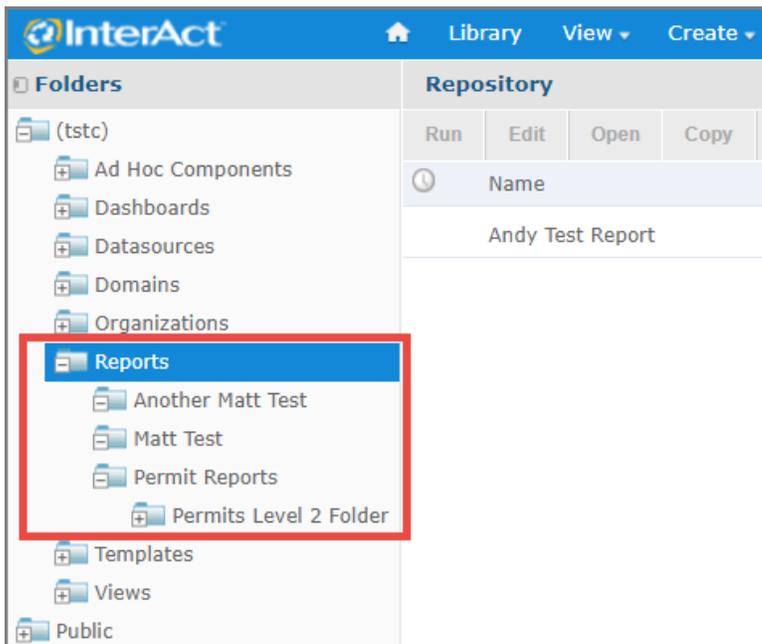
### ***To Create new categories***

1. From the *Forms and Reports* page, click the **Launch** button under the Ad-Hoc Reporting section as shown in Step 1 under "Create an Ad-Hoc Report" on page 325.

- 2. Click **View** on the top menu, then **Repository** to open the Repository.



- 3. Click **+** next to the **Reports** folder to expand subfolder categories that may exist, and repeat for any subfolders.



- 4. To create a new subfolder category, **right-click** on a folder then click **Add Folder**.

- a. Enter the folder **Name**.

- If you enter a unique name that does not exist, that new folder appears as its own category to the user, rather than under *Other Reports*. Refer to numbers 2 and 3 shown under "Menu for users with permissions to run reports" on the previous page.
- If you wish to add Ad-Hoc reports to a category that already exists, enter that exact category name when creating the subfolder. *Permit Reports* is used in the example. Name the new subfolder *Permit Reports*, then Ad-Hoc reports added to that new subfolder will display under the existing *Permit Reports* category. Refer to number 4 shown under "Menu for users with permissions to run reports" on the previous page.

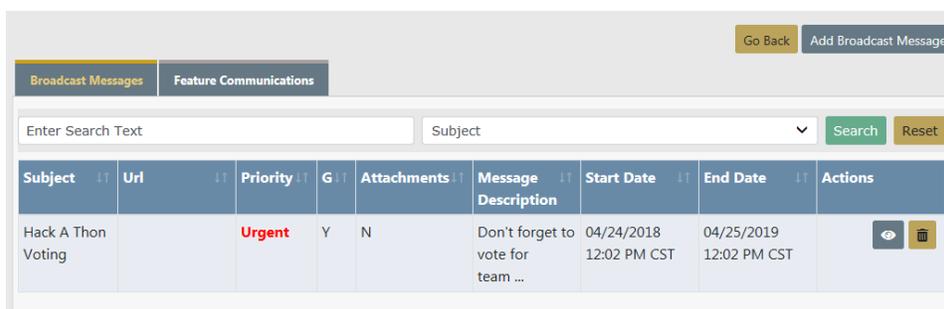
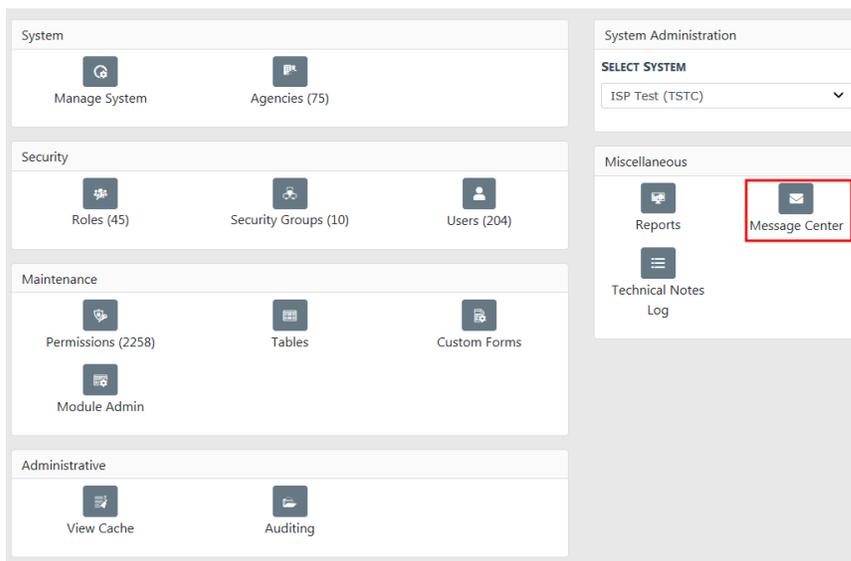
- b. Optionally enter a **Description**.

c. Click **Add**.

**Note:** You cannot delete folders. Submit a support ticket and Caliber staff will delete the folder for you.

# Chapter 20. Message Center

This module allows administrators to setup and maintain broadcast messages for users. From the *Administration Home* page, click the **Message Center** icon to open the *Message Center* page as shown. (Alternatively, select **Broadcast Messages** from the **Administration** drop down menu on the top navigation bar.)



This page has two tabs: **Broadcast Messages** and **Feature Communication**. Depending upon roles, some users see only the **Broadcast Messages** tab; others see both.

- "Broadcast Messages" on the next page for more information and instructions on the first tab.
- "Feature Communications" on page 340 for information and instructions on the second tab.

## Broadcast Messages

The **Broadcast Messages** tab is used to manage administrative messages to users. These messages relay information concerning mandatory meeting or firearms qualification notices as well as time sensitive information such as an Attempt to Locate notice for a stolen vehicle or reckless driver. Administrators set up these messages to be displayed to recipients according to their agency affiliation and/or role designation. Each message includes a start and end date/time. Administrators can select from various message types (informational, web sites, Amber Alerts, warnings, training tips, and so forth) and set a specific priority level for each message.

Use the **Search** fields to search for a specific message as follows:

1. Type a string of characters in the first **Search** text field.
2. Select from the drop-down list in the subject field to specify where the string can be found.
3. Click **Search** to return search results.

## Add Message

Use the following procedure to set up and post a broadcast message.

1. From the **Broadcast Messages** tab on the *Message Center* page, click the **Add Broadcast Message** button in the upper right corner to open the *Add Broadcast Message* page.

Broadcast Messages / Add Broadcast Message

Go Back Save

**Message Details**

**SUBJECT**  **URL**

**MESSAGE**

**MESSAGE TYPE**  **PRIORITY**

**LOGIN NOTIFICATION**

**AGENCY RECIPIENTS**  Select All Remove All

**ROLE RECIPIENTS**  Select All Remove All

**START DATE / TIME**  **END DATE / TIME**

Go Back Save

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

**Note:** This option is only available to users with *c\_admin* permissions.

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

**GLOBAL**  **LOGIN NOTIFICATION**

**SCHEMAS** 🔍

✕ ISP Test (TSTC) ✕ Texas County, TX (TSTB) |

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 one or more **Agency Recipients** for your message by selecting from a list.

**Note:** If **Global** is checked, skip this step.

7. Select one or more **Role Recipients**.
8. Edit the **Start Date** and **Time** if needed (default setting is current date and time) and set an **End Date** and **Time**.

The message automatically expires on the specified end date and time, unless you delete it before that time, or you edit the message and extend the date and time.

9. Click **Save** to save the message. The *Edit Message* page opens with two tabs: *Message Details* and *Attachments*.

10. Click **Save**.

11. Optionally click on the **Attachments** tab to upload an image file. Click **Add Attachment** to select a file and upload.

**Note:** The **Attachments** tab displays after you click **Save** when adding a new attachment.

For more information on uploading attachments, refer to "Attachments" on page 11.

12. Repeat Steps to broadcast another message or click **Go Back** to return to the *Message Center* page.

## View Message

Use the following procedure to view a broadcast message.

1. Access the *Message Center* page. For more information, refer to "Message Center" on page 333.
2. Use the **Search** feature to display a specific message.
  - a. Type a string of characters in the first **Search** text field.
  - b. Select from the drop-down list in the subject field to specify where the string can be found.
  - c. Click **Search** to return search results.

Subject	Url	Priority	G	Attachments	Message Description	Start Date	End Date	Actions
Reminder		Low	N	N	This is a reminder to turn in ...	03/04/2019 03:48 PM CST	03/05/2019 03:48 PM CST	  

3. Click  to the far right in the same row as the listing of the message to open a window similar to the one shown.

Broadcast Messages / [View Broadcast Message](#) Go Back

**Message Details**

SUBJECT Test Broadcast Message		URL	
MESSAGE A broadcast message demonstration.			
MESSAGE TYPE Informational		PRIORITY Low	
GLOBAL <input type="checkbox"/>			
AGENCY RECIPIENTS Ang Police Department			
ROLE RECIPIENTS CID_SUPERVISOR			
START DATE / TIME 12/12/2019 1312		END DATE / TIME 12/13/2019 1312	

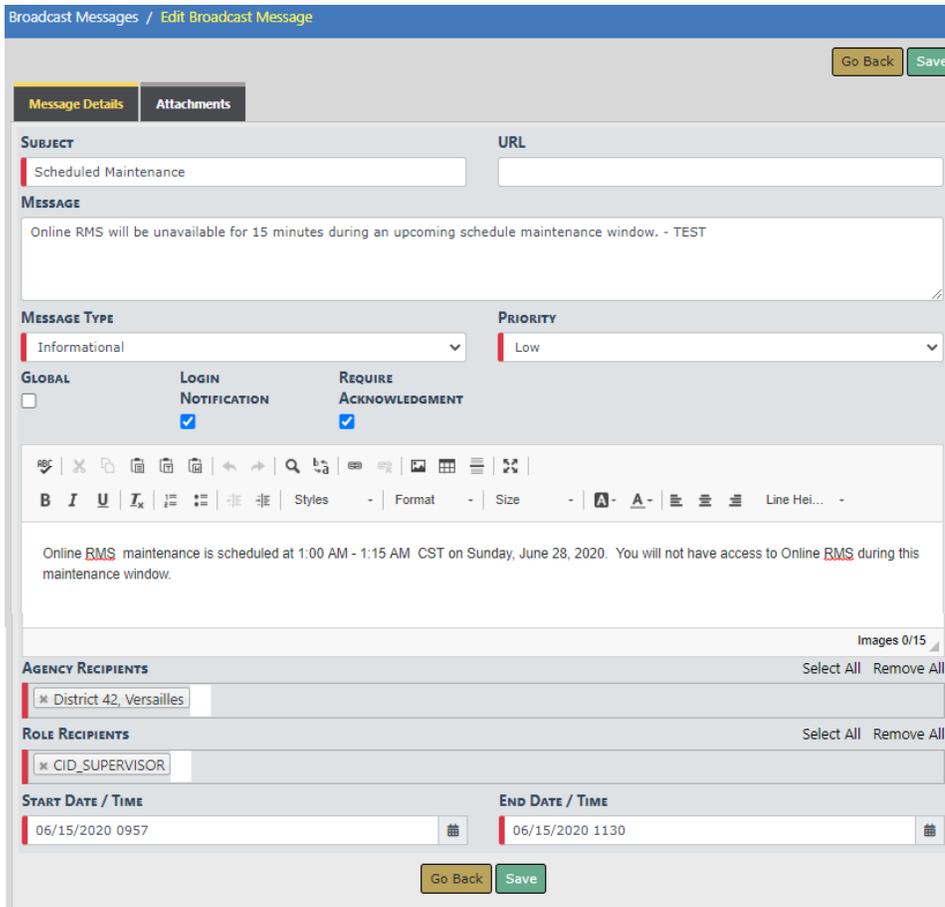
Go Back

4. Click **Go Back** to return to the *Message Center* page.

## Edit Message

Use the following procedure edit a broadcast message.

1. From the *Message Center* page, click  to the far left in the row listing the message you want to edit to open the *Edit Message* page. For more information on accessing the *Message Center*, refer to "Message Center" on page 333.



2. Make changes or upload attachments as needed. ("Add Message" on page 334 for more information.)

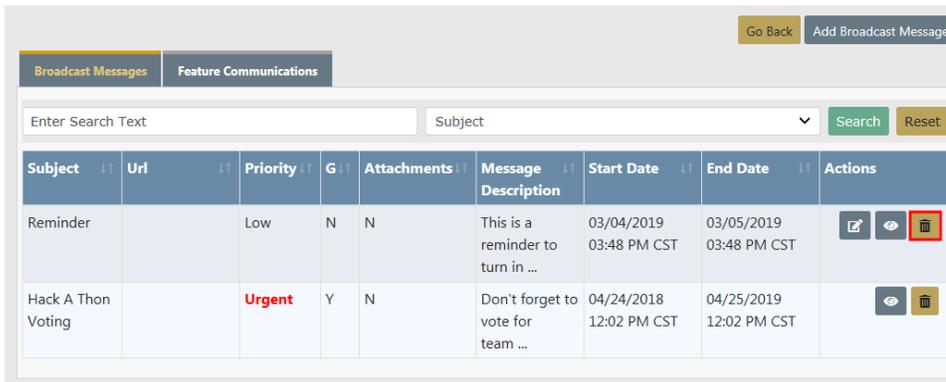
**Note:** To cancel changes, click **Go Back** at any time to return to the *Message Center* page.

3. Click **Save** to save changes and return to the *Message Center* page.

## Delete Message

Use the following procedure to delete a broadcast message.

1. On the **Broadcast Messages** tab of the *Message Center* page, locate the message you want to delete. For more information on access the Message Center, refer to "Message Center" on page 333.
2. Click  to the far right in the same row to delete the message.

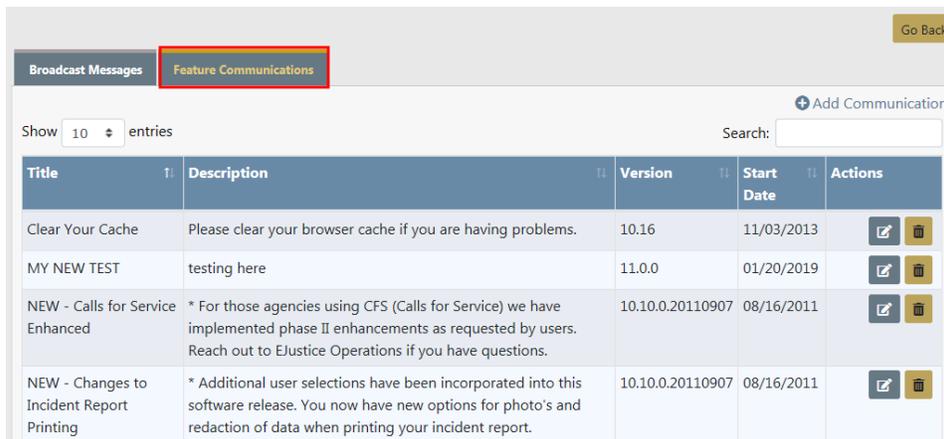


Subject	Url	Priority	G	Attachments	Message Description	Start Date	End Date	Actions
Reminder		Low	N	N	This is a reminder to turn in ...	03/04/2019 03:48 PM CST	03/05/2019 03:48 PM CST	  
Hack A Thon Voting		<b>Urgent</b>	Y	N	Don't forget to vote for team ...	04/24/2018 12:02 PM CST	04/25/2019 12:02 PM CST	 

3. A *Are you sure you want to delete this message?* dialog box appears.
4. Select **OK** to delete or **Cancel** to return to messages without deleting.

## Feature Communications

From the *Message Center* page, click the **Features Communications** tab to open the *Feature Communications* page as shown in the following example. For more information on accessing the *Message Center*, refer to "Message Center" on page 333.



Title	Description	Version	Start Date	Actions
Clear Your Cache	Please clear your browser cache if you are having problems.	10.16	11/03/2013	 
MY NEW TEST	testing here	11.0.0	01/20/2019	 
NEW - Calls for Service Enhanced	* For those agencies using CFS (Calls for Service) we have implemented phase II enhancements as requested by users. Reach out to EJustice Operations if you have questions.	10.10.0.20110907	08/16/2011	 
NEW - Changes to Incident Report Printing	* Additional user selections have been incorporated into this software release. You now have new options for photo's and redaction of data when printing your incident report.	10.10.0.20110907	08/16/2011	 

This page is used to manage communications to users about new features and changes to existing features.

- "Add Feature Communication" below for instructions on adding a communication.
- "Edit Feature Communication" on the next page for instructions on editing a communication.
- Click  in the **Actions** column to the far right of a listing to delete, then confirm deletion when prompted. (The listing no longer shows on the *Feature Communications* page.)

## Add Feature Communication

Use the following procedure to add a communication.

1. From the *Feature Communications* page, click the **Add Communications** button to open the *Add Feature Communication* page as shown. For more information on access the Feature Communications page, refer to "Message Center" on page 333.

**Add Feature Communication** Go Back

**TITLE**

**VERSION** Must be to a version in the app (e.g. 10.10, 10.9, 10.9.2). Click Help->About to get the current version.

**START DATE** Message will be displayed until 15 days after this date. 03/22/2019

**URL** Optional. If entered, a link will be displayed when showing the message

**DESCRIPTION** Limited to 200 characters. Keep these entries brief! The URL is meant to describe it more in detail.

Save

2. After reading all instructions in red text, complete each of the required fields.
3. Click **Save** to save the message and return to the *Feature Communications* page with the new communication shown on the list.

## Edit Feature Communication

Use the following procedure to edit a feature communication.

1. From the *Feature Communications* page, click  in the **Actions** column to the far right of the listing you want to edit to open the *Add Feature Communication* page as shown. For more information on access the Feature Communications page, refer to "Message Center" on page 333.

### Edit Feature Communication Go Back

**TITLE**  
Clear Your Cache

**VERSION** Must be to a version in the app (e.g. 10.10, 10.9, 10.9.2). Click Help->About to get the current version.  
10.16

**START DATE** Message will be displayed until 15 days after this date.  
11/03/2013 

**URL** Optional. If entered, a link will be displayed when showing the message

**DESCRIPTION** Limited to 200 characters. Keep these entries brief! The URL is meant to describe it more in detail.  
Please clear your browser cache if you are having problems.

**Update**

2. Make changes as need to the content of each field.
3. Click **Update** to save the changes.
4. Click **Go Back** to return to the *Feature Communications* page where your changes will show in the edited listing.



# Chapter 21. Maintenance Values

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

Examples:

- Determine if incidents always require approval, regardless of whether or not an offense exists.
- Allow agency to select specific charge violation related to an offense code.
- Enable level 2 approval for criminal complaints.
- Turn email notifications on or off at the application level.
- Set max file size for attachment uploads.
- Set number of days to increment case activity review date.
- CAD IP Address.
- Allow officers to select another agency within their organization when creating evidence.
- Enable fee collections of court papers.
- Require at least one narrative for a field arrest.
- Set a default warrant status when it is added to a field arrest.
- Display criminal complaints under recent activities that were submitted within a specified number of days.
- Require Off Duty and Service Interval when entering fuel/oil.
- Set max number of allowed pinned records per user, if different than the default of 50.
- Optionally require at least one evidence processing record, if applicable to your agency.
- Default chain of custody to print in ascending order.
- Require Judge on warrant creation.

## Access Maintenance Values

There are two ways to access Maintenance Values, depending on your permissions:

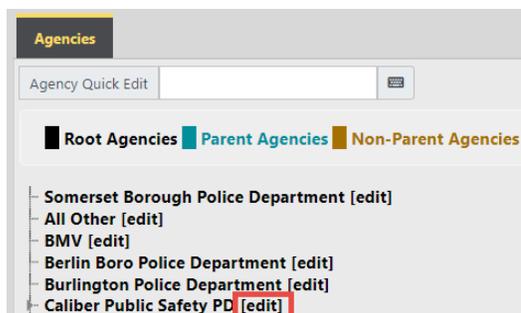
- Agency Profile - Settings Tab.
  - Settings for a specific agency.
- Administration top menu.
  - Schema-level settings (all agencies).

### Agency Profile Settings Tab

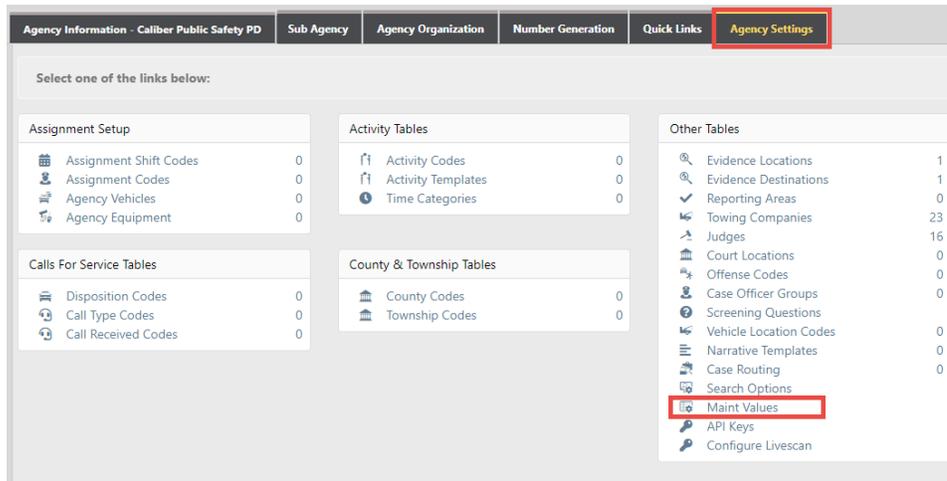
1. Click on the **Administration** top menu, then **Agencies** to open *Agencies*.



2. Click **[edit]** next to the appropriate agency to open the *Agency Profile*.



3. Click on the **Agency Settings** tab to display setting options, then click on **Maint Values** under the *Other Tables* section.



4. The *Agency Maint Values* table opens.

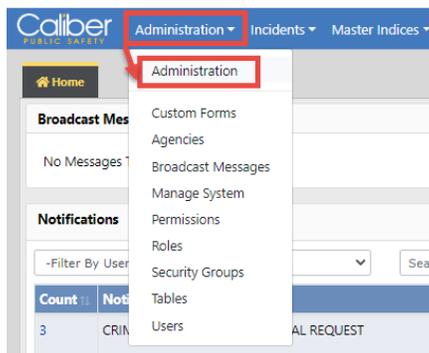
Agencies / Agency Settings / Agency Maint Values

Show 10 entries Go Back Add Maint Value

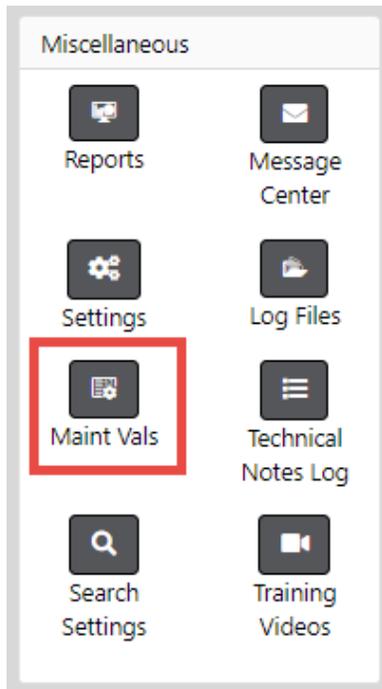
Keyword	Value	Description	Effective Date	End Date	Actions
CID_CASE_ADMIN	Y	Have CID users create cases from approved incidents,	11/21/2011		
CP_PARTY_ROLE_REQUIRED	Y	Whether at least one role is required when adding a person/org to be served on a court paper. Values Y or N Only.	12/18/2014		
ENABLE_INC_LOCATION_CATEGORIES	Y	Y = Enable Common Place Name And Location Category (e.g. Clery) fields for the incident address page. N= disable	06/25/2015		

### Administration Top Menu

1. Click on the **Administration** top menu, then click **Administration** on the drop-down list.



2. Click the **Maint Vals** button under the *Miscellaneous* section.



3. The *Schema Maintenance Values* table opens.

Schema Maintenance Values						
Keyword	Value	Description	Effective Date	End Date	Actions	
ADDR_COMMON_NAME_FREE_TEXT	N	Y=Allow free-text entry for common place name on master address, N=Must select from pick list.	06/15/2015			
ADDRESS_COLLAPSE	06/08/2020	Start date used in Address Collapse	09/24/2009			
ALWAYS_REQUIRE_LOC_CATEGORY	Y	Y or N. When enabled, will require a common place category even if no common place names are available. Only applies when ENABLE_INC_LOCATION_CATEGORIES is enabled	08/02/2016			
APPROVAL_REQ	Y	Determines if incidents require approval all the time regardless if offenses exist or not.	01/01/2010			
ARREST_CHARGE_CODES	Y	Allow agency to select specific charge violation related to an Offense code	04/02/2010			

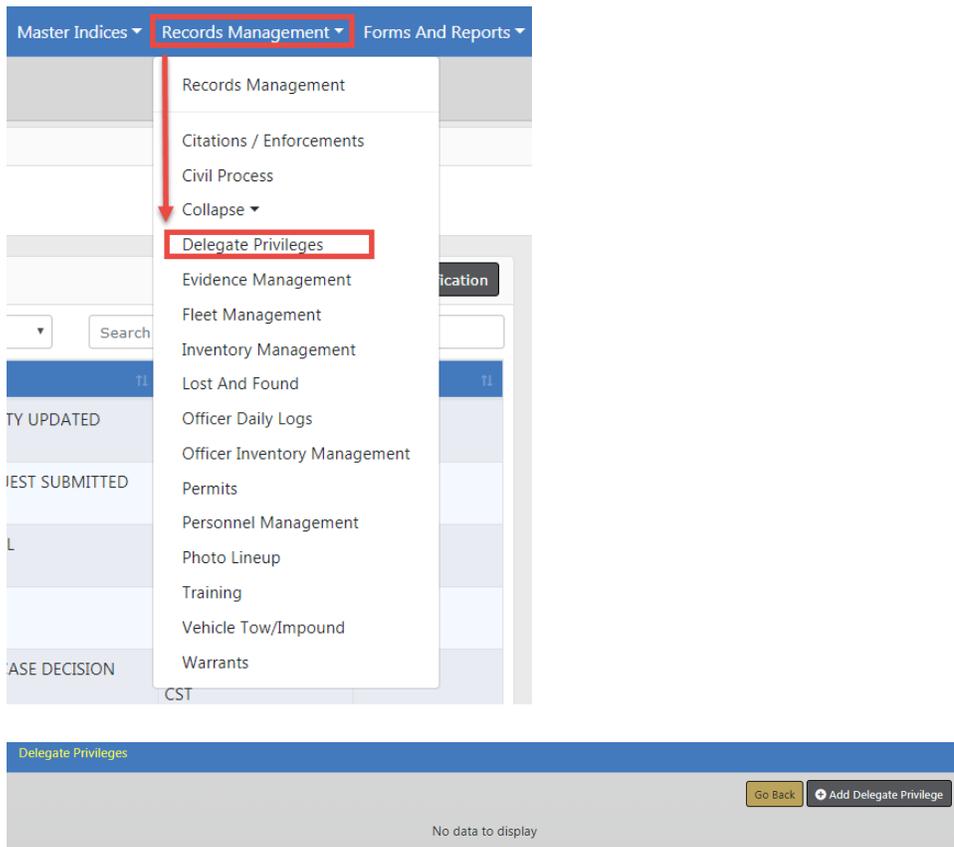
# Chapter 22. Delegate Privileges

The Delegate Privileges feature allows users with certain administrative functions to transfer their privileges (roles) to other RMS users. For example, a user going away on vacation for two weeks might delegate certain of their roles to another user during that period of time. The next time the delegated user logs into the application, he will have the privileges associated with the delegated roles.

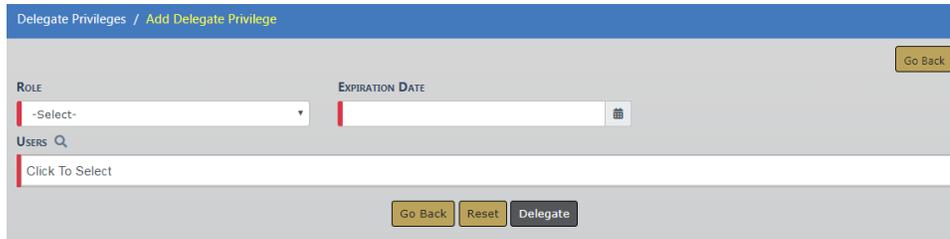
- It is up to the agency to decide whether to use this functionality or not.
- A user is only able to delegate the privileges (roles) that have been assigned to them.

Use the following procedure to delegate privileges.

1. Click the **Records Management** label on the top navigation bar, then click the **Delegate Privileges** option to open the *Delegate Privilege* page as shown.



- Click the **Add Delegate Privilege** button in the upper right corner to display the *Add Delegate Privilege* page.



The screenshot shows the 'Add Delegate Privilege' page. At the top, there is a blue header with the text 'Delegate Privileges / Add Delegate Privilege'. Below the header, there is a 'Go Back' button in the top right corner. The main form area contains two input fields: 'ROLE' with a dropdown menu currently showing '-Select-' and 'EXPIRATION DATE' with a date picker icon. Below these fields is a 'USERS' section with a search icon and a text input field containing 'Click To Select'. At the bottom of the form, there are three buttons: 'Go Back', 'Reset', and 'Delegate'.

- Select the **Role** for which you wish to delegate privileges. (It may already appear in the field by default, but can be changed.)
- Enter the **Expiration Date**.
- Select the **User** by entering in the user's name then selecting the appropriate user(s) from the displayed list, or click on the search icon  to open the search window.
- Click **Delegate** to delegate the privileges associated with the specified role to the specified users and redisplay the *Delegate Privilege* page with the delegation listed in the grid.

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