



**Online RMS**

**11.5**

**User Guide**

**December 2020**



# Caliber Public Safety

## Online RMS 11.5

### User Guide

### December 2020

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# Chapter 1. Introduction

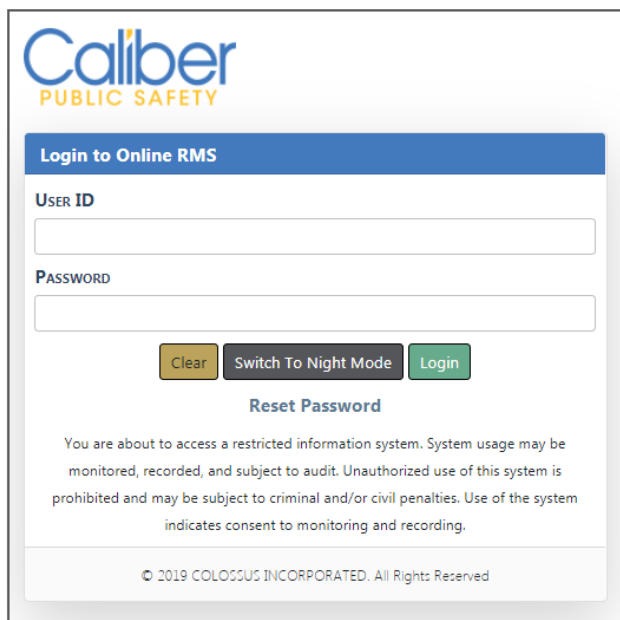
## Overview

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

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

## Login Page

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



The screenshot shows the login interface for Caliber Public Safety's Online RMS. At the top left is the logo for Caliber PUBLIC SAFETY. Below it is a blue header bar with the text "Login to Online RMS". The main form area contains two input fields: "USER ID" and "PASSWORD". Below the password field are three buttons: "Clear" (yellow), "Switch To Night Mode" (dark grey), and "Login" (green). Underneath these buttons is a "Reset Password" link. A disclaimer text is present: "You are about to access a restricted information system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of this system is prohibited and may be subject to criminal and/or civil penalties. Use of the system indicates consent to monitoring and recording." At the bottom of the page, there is a copyright notice: "© 2019 COLOSSUS INCORPORATED. All Rights Reserved".

## Production Site

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

## Training Site

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

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

## Caliber Main Website

<https://caliberpublicsafety.com>

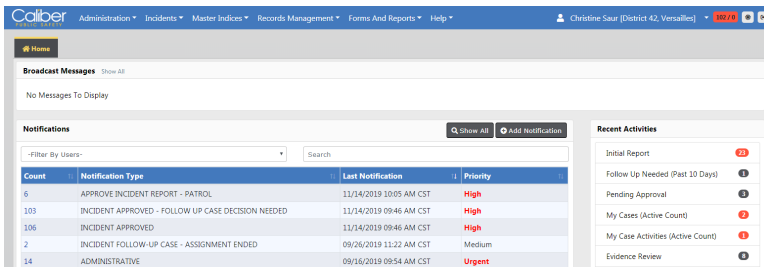
For best performance, Caliber Public Safety recommends using a computer, laptop, or tablet purchased within the last three years; running an industry popular web browser that is actively supported by the browser manufacturer and connects to the internet using DSL, Cable, or 4G cellular. The browser must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

## Night Versus Day Mode

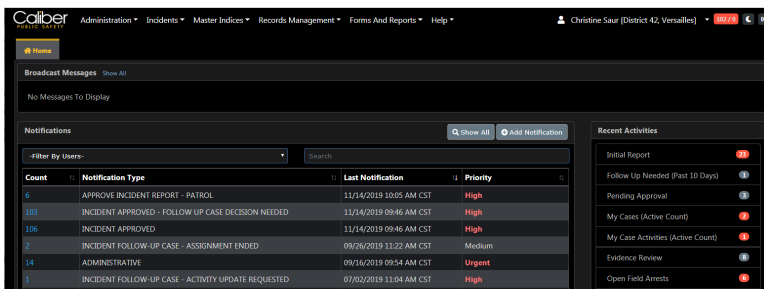
The Online RMS application offers a choice of two background colors: White or Black; **Day Mode** or **Night Mode** respectively. The **Day Mode** background appears by default when the application launches at login; however, you can set your **Mode Preference** to default to **Night Mode** if you wish.

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

## Day Mode



## Night Mode



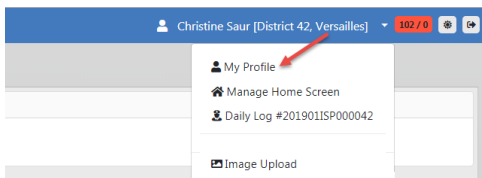
## Set Mode Preference

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

### Default Mode

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

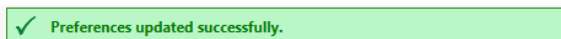
1. Click on your **login name** on the top menu bar, then select **My Profile**.



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

The screenshot shows the 'Manage User' window with the 'Preferences' tab selected. Under 'Notification Settings', there are options for 'EMAIL NOTIFICATIONS PRIORITY', 'HOURS FOR NOTIFICATIONS', 'AUDIBLE ALERT', and 'ALWAYS SEND SUBSCRIPTION NOTIFICATIONS'. Under 'Options', there are 'INCIDENT SETUP WIZARD' and 'BREADCRUMB OPTIONS'. The 'DAY / NIGHT MODE' dropdown is open, showing 'Normal / Day Mode' as the selected option, with a red arrow pointing to it.

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



## Toggle Mode

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

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

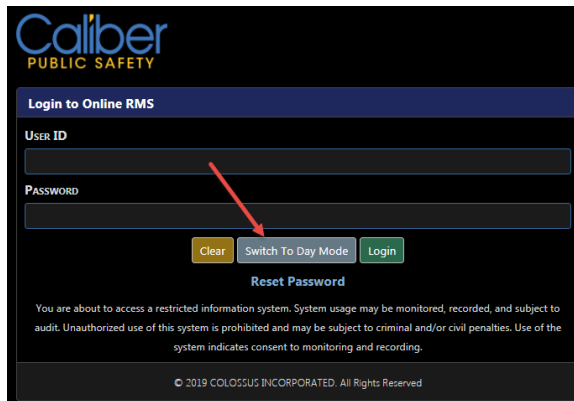
- A toggle button on the *Login* screen.
- Click on your *login name* on the top menu bar of the Dashboard.

## Login Screen

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

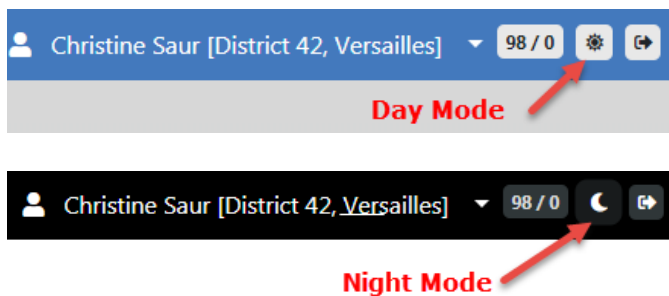
The screenshot shows the 'Login to Online RMS' screen. It has fields for 'USER ID' and 'PASSWORD'. Below the fields are buttons for 'Clear', 'Switch To Night Mode', and 'Login'. A red arrow points to the 'Switch To Night Mode' button. Below the buttons is a 'Reset Password' link and a disclaimer: 'You are about to access a restricted information system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of this system is prohibited and may be subject to criminal and/or civil penalties. Use of the system indicates consent to monitoring and recording.' At the bottom, it says '© 2019 COLOSSUS INCORPORATED. All Rights Reserved.'

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



## Dashboard

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



## Password Rules

Each user will have a unique **User ID** and **Password**.

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

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

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

### Notes:

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

## Password Reset

There are three ways to reset a password:

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

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

## Forgotten Password

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

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

## Reset Password via Email

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

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

**NOTE:** There is also a **Reset Password via Email** button on the *Change Password* link of My Profile. For information on My Profile, refer to "My Profile Overview" on page 45.

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

## Change Password from My Profile

1. Click **Change Password** on My Profile. For more information, refer to "My Profile Overview" on page 45.

## Administrator Password Reset

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

## User Account Inactivity Deactivation

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

From: noreply@interact911.com [mailto:noreply@interact911.com]  
Sent: Thursday, August 17, 2017, 4:00 AM  
To: [CSmith@gmail.com](mailto:CSmith@gmail.com)>  
Subject: Your Caliber RMS Account Will Expire in 30 days.

---

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

For more information refer to the system administrator.

## Home Page

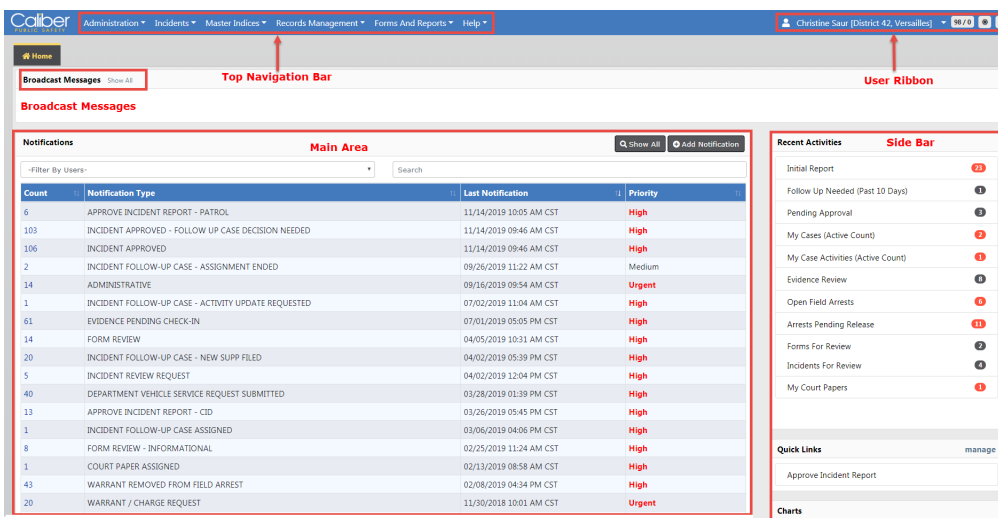
Online RMS is a comprehensive information management system. Access to Online RMS begins with the customizable **Home page**. This page can display any combination of recent activities, charts of crime statistics, links to the most frequently used functions in the system, external links to frequently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



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



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



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

For information on managing the **Home Page** layout, refer to the *Manage Front Screen Layout* section of "User Information Menu" on page 39.

## Top Navigation Bar Area

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

The Top Navigation Bar adapts to mobile devices by utilizing a Collapsible Menu. For more information, refer to "Mobile Device Friendly" on page 14

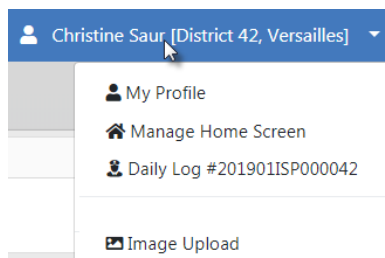
## User Ribbon

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

The User Ribbon adapts to mobile devices by utilizing a Collapsible Menu. For more information, refer to "Mobile Device Friendly" on page 14

### User Information Menu

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

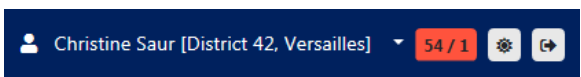


For more information on these options, refer to "User Information Menu" on page 39.

### New Notification Alert

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

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



↑  
**Notifications**

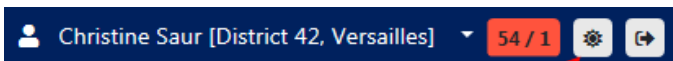
Notifications & Messages		
Notifications		
Type	Priority	Description
ADMINISTRATIVE	Urgent	STATE_OFFICER15 Account Has Been Locked
ADMINISTRATIVE	Urgent	STATE_OFFICER15 Account Has Been Locked
ADMINISTRATIVE	Urgent	STATE_OFFICER14 Account Has Been Locked
INCIDENT APPROVED	High	Incident Report 2018D4210183 Supp #0 Has Been Approved. Offenses:35-42-2-1 B05 BATTERY- KNIFE;

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

For more information on notification alerts, refer to "Notifications" on page 21.

### ***Toggle Night Versus Day Mode***

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



↑  
**Currently Day Mode**

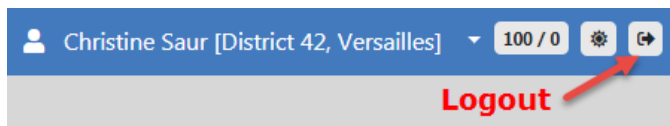


**Night  
Mode**

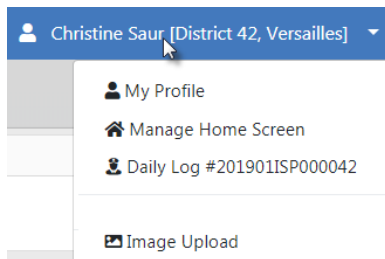
For more information on Night and Day Modes, refer to "Night Versus Day Mode" on page 2.

### ***Logout***

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



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



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

For more information on the *User Information Menu*, refer to "User Information Menu" on page 39.

## Recent Activities

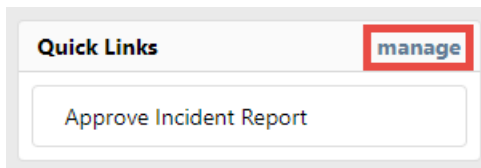
The **Recent Activities** section that appears on the right side of the Home Page allows quick access to edit a user's Incident reports, Cases, Open Field Arrests, Open Forms, Evidence Review, My Court Appearances, Forms for Review, and other areas specific to the logged in user.

## Quick Links

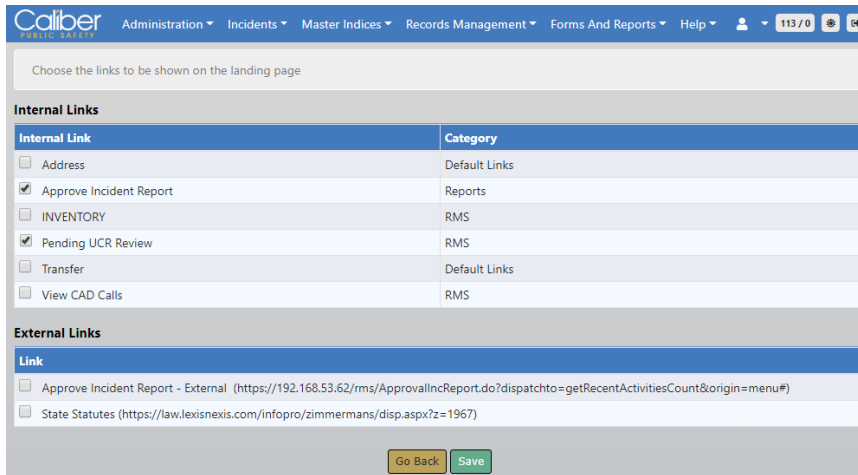
**Quick Links** that appear on the side bar of the Home Page allows for quick access to different areas within Online RMS. You can manage which links you want to see here.

**NOTE:** Only you, as the user, can manage these links; the administrator cannot preset them for you.

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



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

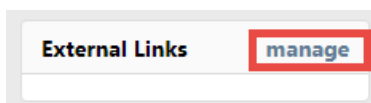


## External Links

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

**NOTE:** Only you, as the user, can manage these links; the administrator cannot preset them for you.

Click on the **Manage** link to add items to the External Links area.



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

Choose the links to be shown on the landing page

**Internal Links**

Internal Link	Category
<input type="checkbox"/> Address	Default Links
<input checked="" type="checkbox"/> Approve Incident Report	Reports
<input type="checkbox"/> INVENTORY	RMS
<input checked="" type="checkbox"/> Pending UCR Review	RMS
<input type="checkbox"/> Transfer	Default Links
<input type="checkbox"/> View CAD Calls	RMS

**External Links**

Link
<input type="checkbox"/> Approve Incident Report - External ( <a href="https://192.168.53.62/rms/ApprovaIncReport.do?dispatchto=getRecentActivitiesCount&amp;origin=menu#">https://192.168.53.62/rms/ApprovaIncReport.do?dispatchto=getRecentActivitiesCount&amp;origin=menu#</a> )
<input type="checkbox"/> State Statutes ( <a href="https://law.lexisnexis.com/info/zimmers/disp.aspx?z=1967">https://law.lexisnexis.com/info/zimmers/disp.aspx?z=1967</a> )

Go Back Save

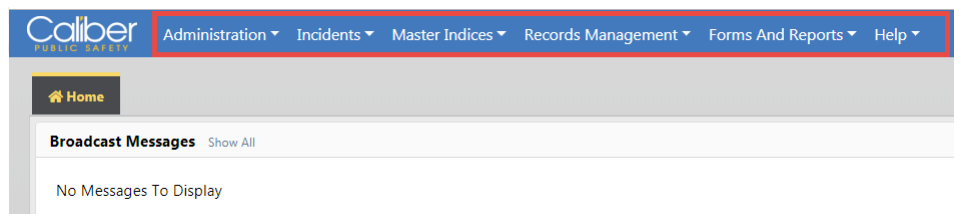
## Charts

**Charts** allow users to access to statistical charts and events within Online RMS, with the proper authority.

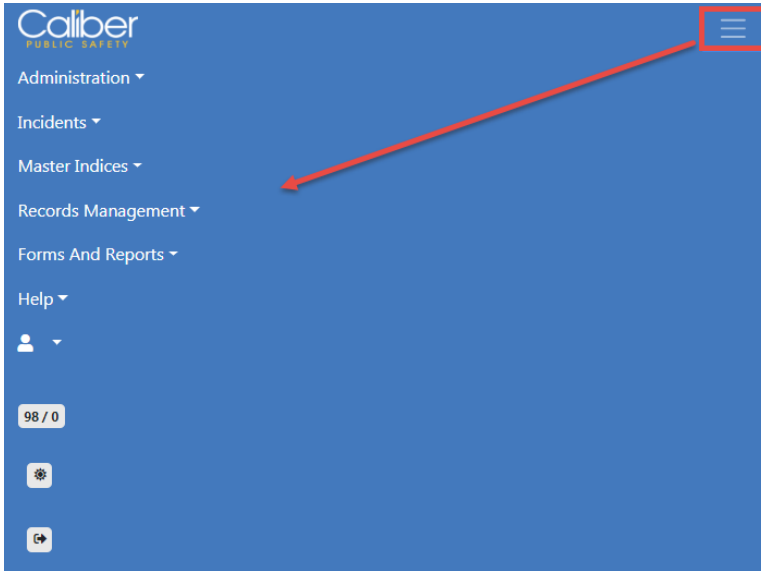
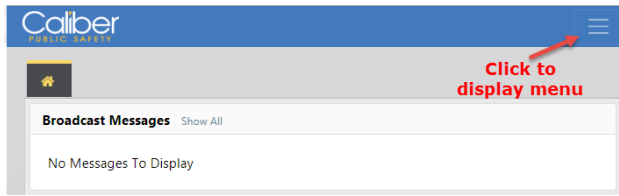
## Mobile Device Friendly

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

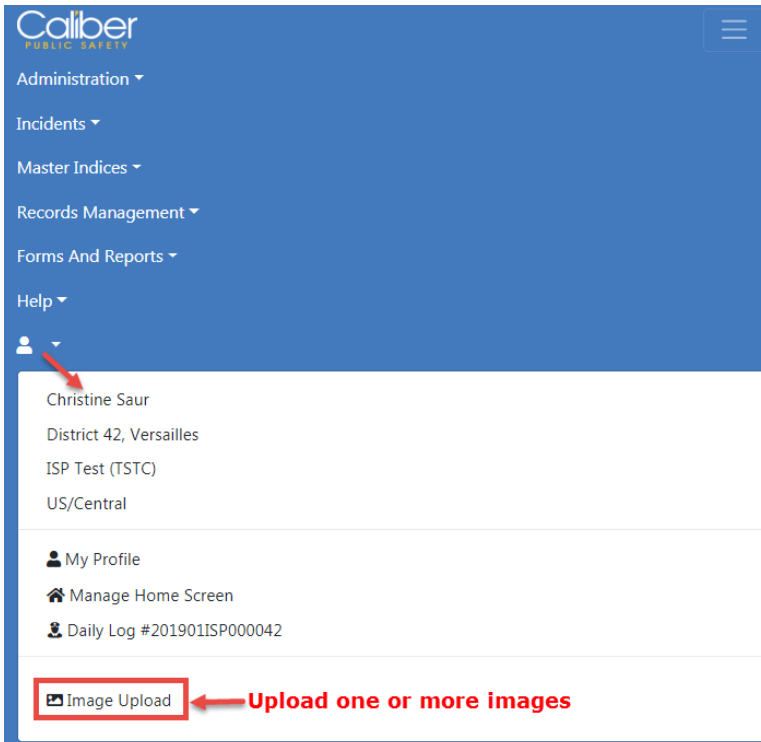
On larger screens, drop-down and other menus appear across the top of the screen.



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



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



Upload one or more images directly from your mobile device to your personal RMS Image Library. You can then easily import the images from the Image Library into an incident report, field arrest, or master person record. For more information on uploading images to the Image Library, refer to "Image Library" on page 65.

## Broadcast Messages

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

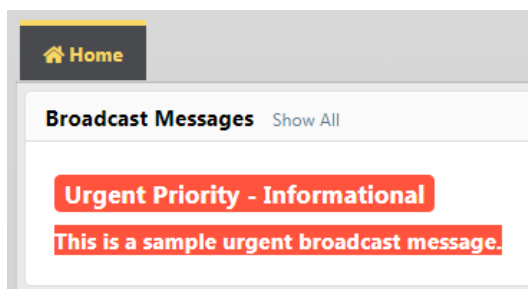
The information can be enforcement related, informational, or administrative in nature. **Broadcast Messages** relay administrative messages to users such as mandatory meeting or firearms qualification notices as well as time sensitive information such as an Attempt to Locate notice for a stolen vehicle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

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

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

### Urgent Priority Message

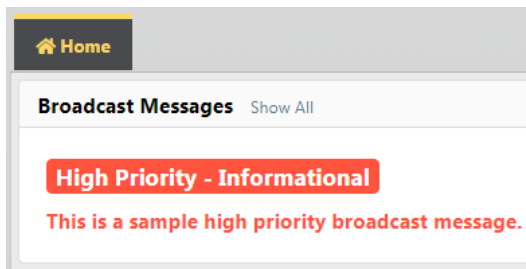
Full color coding of the message.



### High Priority Message

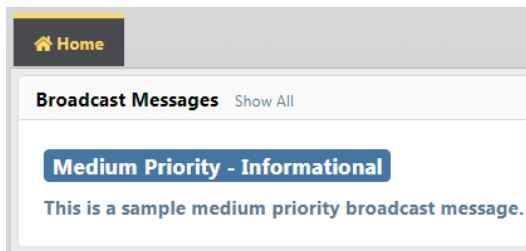
Color Coding of high priority message.



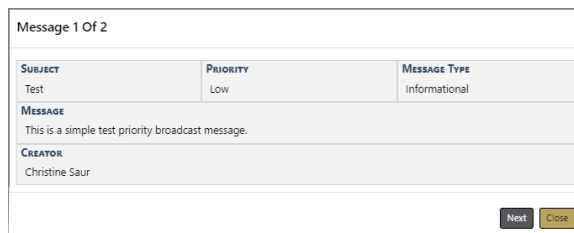


## Medium Priority Message

Color coding of medium priority message.



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



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

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

Message 2 Of 2

SUBJECT	PRIORITY	MESSAGE TYPE
Scheduled Maintenance	Low	Informational

**MESSAGE**  
Online RMS will be unavailable for 15 minutes during an upcoming scheduled maintenance window. - TEST

**CREATOR**  
Christine Saur

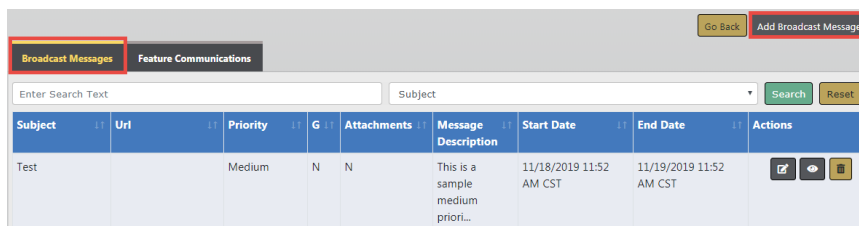
**NOTIFICATION**  
Online RMS maintenance is scheduled at 1:00 AM - 1:15 AM CST on Sunday, June 28, 2020. You will not have access to Online RMS during this maintenance window.  
TEST

**I ACKNOWLEDGE THAT I HAVE READ THIS NOTIFICATION**

Previous Close

## Adding a Broadcast Message

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



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

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

**Note:** This option is only available to users with *c\_admin* permissions.

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

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

The screenshot shows a web interface for creating a message. At the top, there are two dropdown menus: 'MESSAGE TYPE' (set to 'Informational') and 'PRIORITY' (set to 'Low'). Below these are three checkboxes: 'GLOBAL' (unchecked), 'LOGIN NOTIFICATION' (checked), and 'REQUIRE ACKNOWLEDGMENT' (checked). A rich text editor is open, displaying the text: 'Online RMS maintenance is scheduled at 1:00 AM - 1:15 AM CST on Sunday, June 28, 2020. You will not have access to Online RMS during this maintenance window.' The editor includes a toolbar with various formatting options like bold, italic, underline, and font color.


- a. When you select the **Login Notification** checkbox, a text editor opens, where you can enter a message and format the content.
  - b. Select the **Require Acknowledgment** checkbox if you want to require users to acknowledge the message. If this option is checked, the message appears every time a user logs in, until the user acknowledges the message.
6. Select **Agency Recipients**. Choose one or more listed agency in the agency's schema/workgroup.

**Note:** If **Global** is checked, skip this step.

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

## Deleting a Broadcast Message

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

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

Subject	Url	Priority	G	Attachments	Message Description	Start Date	End Date	Actions
Test		Medium	N	N	This is a sample medium priori...	11/18/2019 11:52 AM CST	11/19/2019 11:52 AM CST	[Icons]
Test 2		Low	N	N	This is a sample low priority ...	11/18/2019 12:00 PM CST	11/19/2019 12:00 PM CST	[Icons]

## Notifications

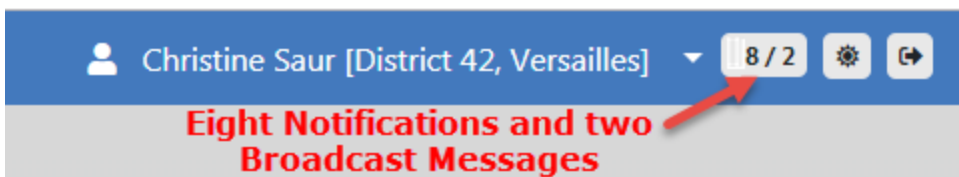
This area presents a grouped list of all **Notifications** for the user. The **Notification Types** can be:

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

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

## New Notifications

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



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

Notifications & Messages		
Notifications		
Type	Priority	Description
FORM REVIEW - INFORMATIONAL	High	Form Comment Added; This is a test comment
FORM REVIEW - INFORMATIONAL	High	Form Comment Added; This is my 2nd comment
FORM REVIEW	High	1 Custom Form to Rule Them All available for review;Resubmitted. please approve., (District 42, Versailles)
FORM REVIEW	High	1 Custom Form to Rule Them All available for review;test (District 42, Versailles)
FORM REVIEW	High	1 Custom Form to Rule Them All available for review;test (District 42, Versailles)
FORM REVIEW	High	test available for review;tesitng (District 42, Versailles)
FORM REVIEW	High	Towing Form available for review;asdfasfa (District 42, Versailles)
WARRANT REMOVED FROM FIELD ARREST	High	Warrant #123456 (Case #) removed from Field Arrest #1807579 by Homer Simpson. Status changed from Served to Active

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

Notification

<b>TYPE</b> FORM REVIEW - INFORMATIONAL	<b>PRIORITY</b> High
<b>SENDER</b> Hicks Aaron	<b>SENT ON</b> 09/27/2018 11:09 AM CST
<b>DESCRIPTION</b> Form Comment Added; 5th comment	

Take Action Delete Close

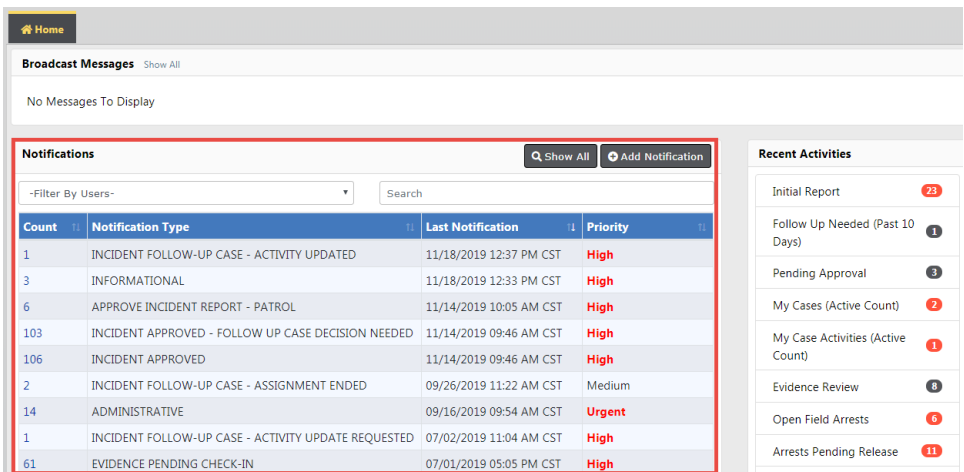
Depending on the type of notification, it can be canceled, replied to, reassigned, deleted, or acted on. The action buttons that appear on the bottom of the window vary by type of notification.

Click the **Clear New** button at the bottom of the screen to clear all new notifications.

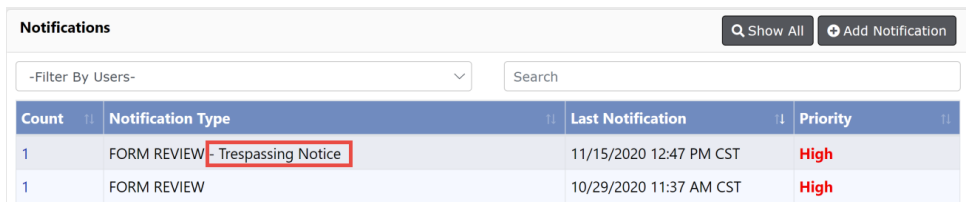
Click **Close** to close the window.

### Show All Notifications

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

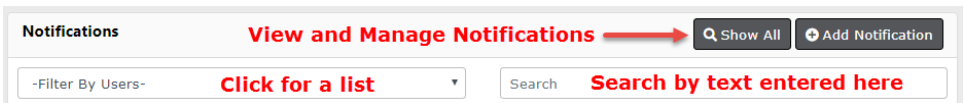


**Note:** With Caliber Public Safety version 11.5 and higher, a Notification Type sub-category includes the Custom Form name, if applicable, for improved usability for reviewing Custom Forms submissions and taking action.



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

If you set up **User Groups** then you see the **Filter By Users** option. For more information on **User Groups** refer to the *My Profile* section of "User Information Menu" on page 39.



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

<input type="checkbox"/>	Type	Priority	Sender	Description	Sent On
<input type="checkbox"/>	INCIDENT FOLLOW-UP CASE - ACTIVITY UPDATED	High	Saur Christine	LEA CASE #: 00000158CASE2019 ACTIVITY TYPE: Case Note ACTIVITY DATE: 07/01/2019 0828 COMMENTS: Updated next review date. INCIDENTS: Report #: 2019D4210229 -Address: 100 North Main Street BLOOMINGTON, IL 61701 -Offenses: 35-43-2-1 B02 - BURGLARY- APARTMENT COMPLEX	11/18/2019 12:37 PM CST
<input checked="" type="checkbox"/>	INFORMATIONAL	High	Saur Christine	Sample high priority notification.	11/18/2019 12:33 PM CST
<input checked="" type="checkbox"/>	INFORMATIONAL	High	Saur Christine	Sample high priority notification.	11/18/2019 12:28 PM CST
<input type="checkbox"/>	INFORMATIONAL	Low/Informational	Saur Christine	Sample Notification.	11/18/2019 12:27 PM CST
<input type="checkbox"/>	APPROVE INCIDENT REPORT - PATROL	High	Simpson Homer	The Incident Report#: 2018D4210183 Supp#: 2 Has Been Submitted For Approval. Offenses: 35-42-2-1 B05 BATTERY- KNIFE; 35-43-2-1 B01 BURGLARY- AIRPORT;	11/14/2019 10:05 AM CST

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

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

Notification

<b>TYPE</b> FORM REVIEW - INFORMATIONAL	<b>PRIORITY</b> High
<b>SENDER</b> Hicks Aaron	<b>SENT ON</b> 09/27/2018 11:09 AM CST
<b>DESCRIPTION</b> Form Comment Added; 5th comment	

Take Action
Delete
Close

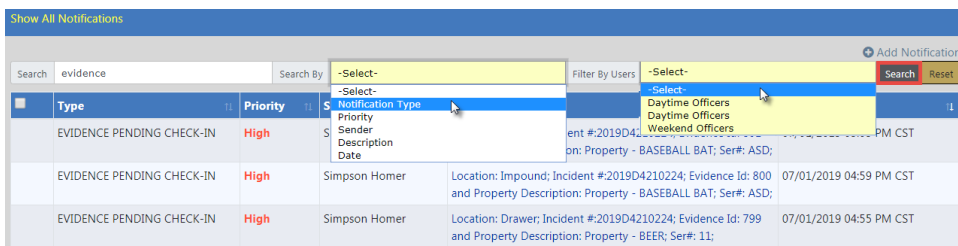
Depending on the type of notification, it can be canceled, replied to, reassigned, deleted, or acted on.

## Search Notifications

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

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



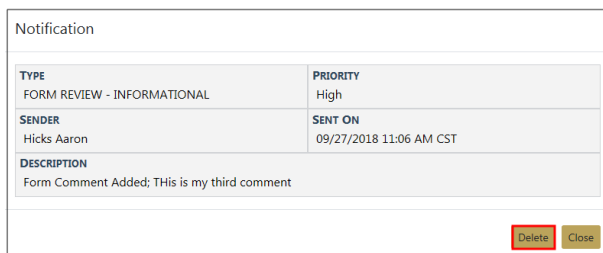


Click the **Reset** button to clear the entered Search text.

## Delete Notifications

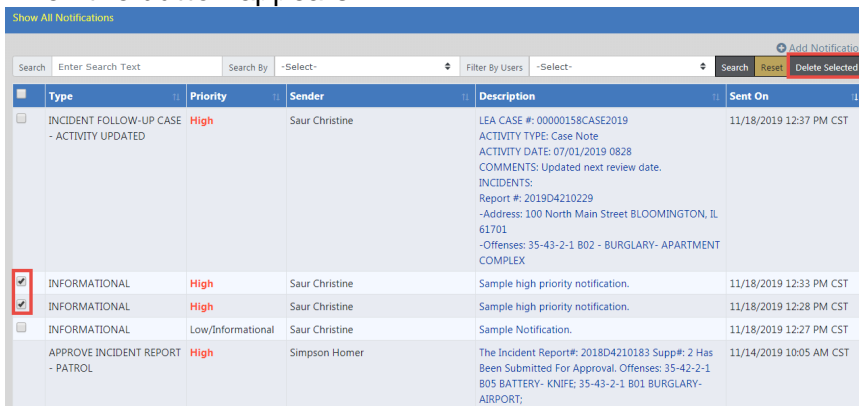
There are up to three ways to *Delete* Notifications that have the delete option.

- From the **New Notification** message. Refer to "New Notifications " on page 21.
- From the link in the **Description** column of the **Show All** notifications grid. Refer to "Show All Notifications" on page 22.



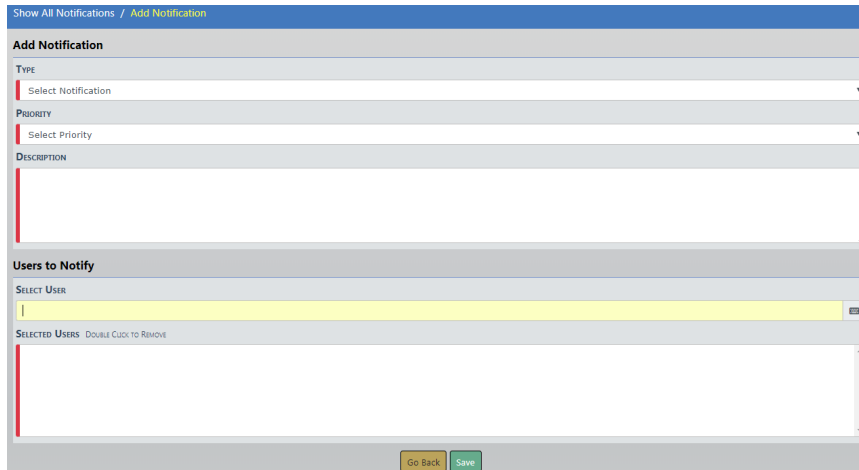
- Check the box in the **Show all** notifications grid.

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



## Add Notifications

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



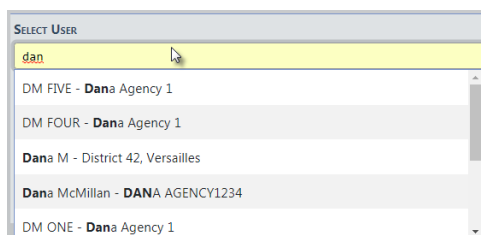
The screenshot shows the 'Add Notification' screen. At the top, there is a breadcrumb trail: 'Show All Notifications / Add Notification'. Below this is a form with the following sections:

- Add Notification**:
  - TYPE**: A drop-down menu with 'Select Notification' as the current selection.
  - PRIORITY**: A drop-down menu with 'Select Priority' as the current selection.
  - DESCRIPTION**: A large text area for entering the notification details.
- Users to Notify**:
  - SELECT USER**: A search field with a magnifying glass icon.
  - SELECTED USERS**: A list area with a 'DOUBLE CLICK TO REMOVE' instruction.

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

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

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



This close-up shows the 'SELECT USER' search field. The text 'dan' is entered in the search box. Below the search box, a list of users is displayed:

- DM FIVE - Dana Agency 1
- DM FOUR - Dana Agency 1
- Dana M - District 42, Versailles
- Dana McMillan - DANA AGENCY1234
- DM ONE - Dana Agency 1



This close-up shows the 'Users to Notify' section. The 'SELECT USER' search field is empty. The 'SELECTED USERS' list contains two entries:

- Dana M - District 42, Versailles
- Christine Saur - District 42, Versailles

When finished, click the **Save** button.

## Entering Dates and Times

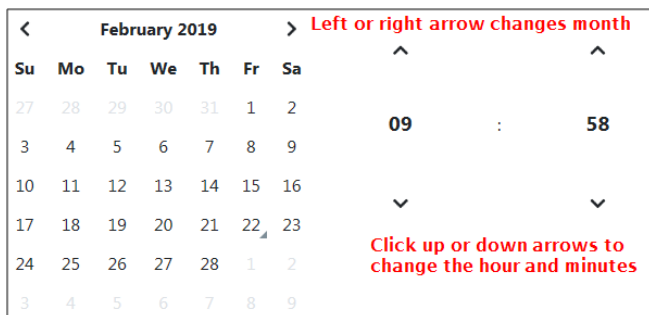
Dates and times can be entered using different methods.

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

### Calendar Tool

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

Click the calendar icon  to open the **Calendar Tool**.



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



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

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

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

### Text Fields

Type information directly into the field.

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

### Drop-Down Lists

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

### Buttons

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

## Function Buttons

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

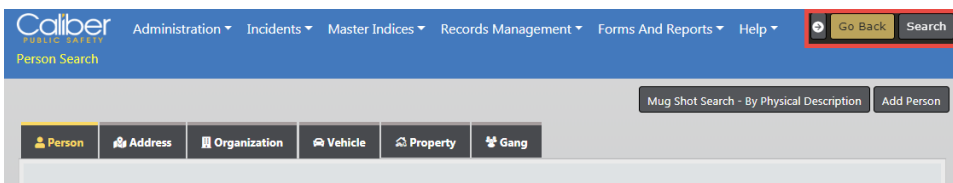
## Radio Buttons

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

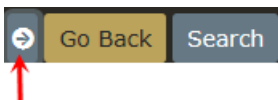
Size:  Small  Medium  Large

## Floating Buttons

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



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



## Check Boxes

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

## Required Fields

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

The screenshot shows a form titled "Header Information" with several fields. The "REPORT ID" field contains the value "3225". The "REPORT SECURITY" field is a dropdown menu with "Patrol Officer" selected. The "MEDIA/CRIME SUMMARY" field contains the text "dsadsa". The "INCIDENT REPORT TYPES" field has a search icon and a tag that says "x Burglary / Building". The "REPORT DATE" field contains "03/09/2019 1827" and has a calendar icon. The "DISPATCH DATE" field is empty and has a calendar icon. The "INCIDENT CLASSIFICATION" field is empty. Red vertical bars on the left side of the "REPORT SECURITY", "MEDIA/CRIME SUMMARY", "REPORT DATE", and "DISPATCH DATE" fields indicate they are required.

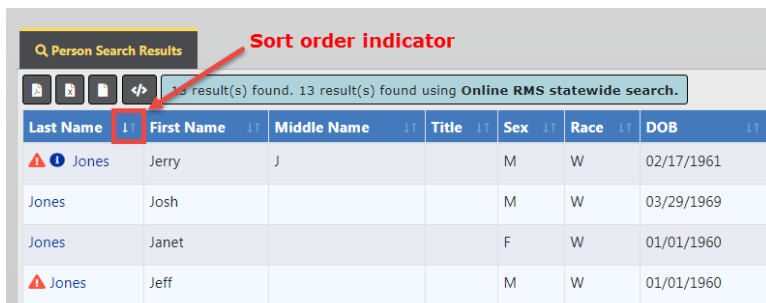
You must complete required fields to continue. If you do not supply a value in a required field, a descriptive message highlighted in yellow displays directly below the field.

This screenshot is similar to the previous one, but the "REPORT DATE" field is empty and has a red border. Below the field, a yellow banner contains a warning icon and the text "Report Date/Time is required". The "DISPATCH DATE" field is also empty and has a red border. The "INCIDENT CLASSIFICATION" field is a dropdown menu with "-Select-" selected. Red vertical bars on the left side of the "REPORT SECURITY", "MEDIA/CRIME SUMMARY", "REPORT DATE", and "DISPATCH DATE" fields indicate they are required.

## Column Sorting

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

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



The screenshot shows a search results table for 'Person Search Results'. The table has columns: Last Name, First Name, Middle Name, Title, Sex, Race, and DOB. The 'First Name' column header has a small downward arrow next to it, indicating it is currently sorted in descending order. A red arrow points to this arrow with the text 'Sort order indicator'.

Last Name	First Name	Middle Name	Title	Sex	Race	DOB
▲ Jones	Jerry	J		M	W	02/17/1961
Jones	Josh			M	W	03/29/1969
Jones	Janet			F	W	01/01/1960
▲ Jones	Jeff			M	W	01/01/1960

## SmartSearch

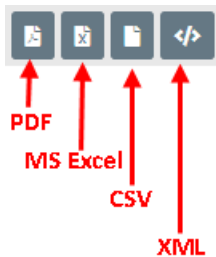
Users can search for incidents across all agencies in the Online RMS system within the user's State, or agencies can choose to share data with other agencies outside of their State. This search adds a simple interface to perform searches the way one would in an Internet search engine, such as Google.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

For details on using Incident **SmartSearch** refer to the Incident "SmartSearch" on page 225 .

## Export Search Results

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

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



- PDF (Printable Document Format)
  - File that contain a captured image of a printed document.
- MS Excel
  - Microsoft Excel is an electronic spreadsheet; typically used for storing and calculating data.
  - **NOTE:** Online RMS supports MS Excel export up to 5,000 records.
- CSV (Comma-Separated Values)
  - Files that contain a collection of data in a standard format; typically used for exchanging data between applications that support CSV files.
  - **NOTE:** Online RMS supports CSV export up to 5,000 records.
- XML (Extensible Markup Language)
  - A plain text file that contains a collection of data with a defined set of structure and storage rules of that data; typically used for websites.

## Personnel Management

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

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



### Employee Info

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

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

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

### Training

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

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

# Chapter 2. Navigation Icons

## Home Button

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

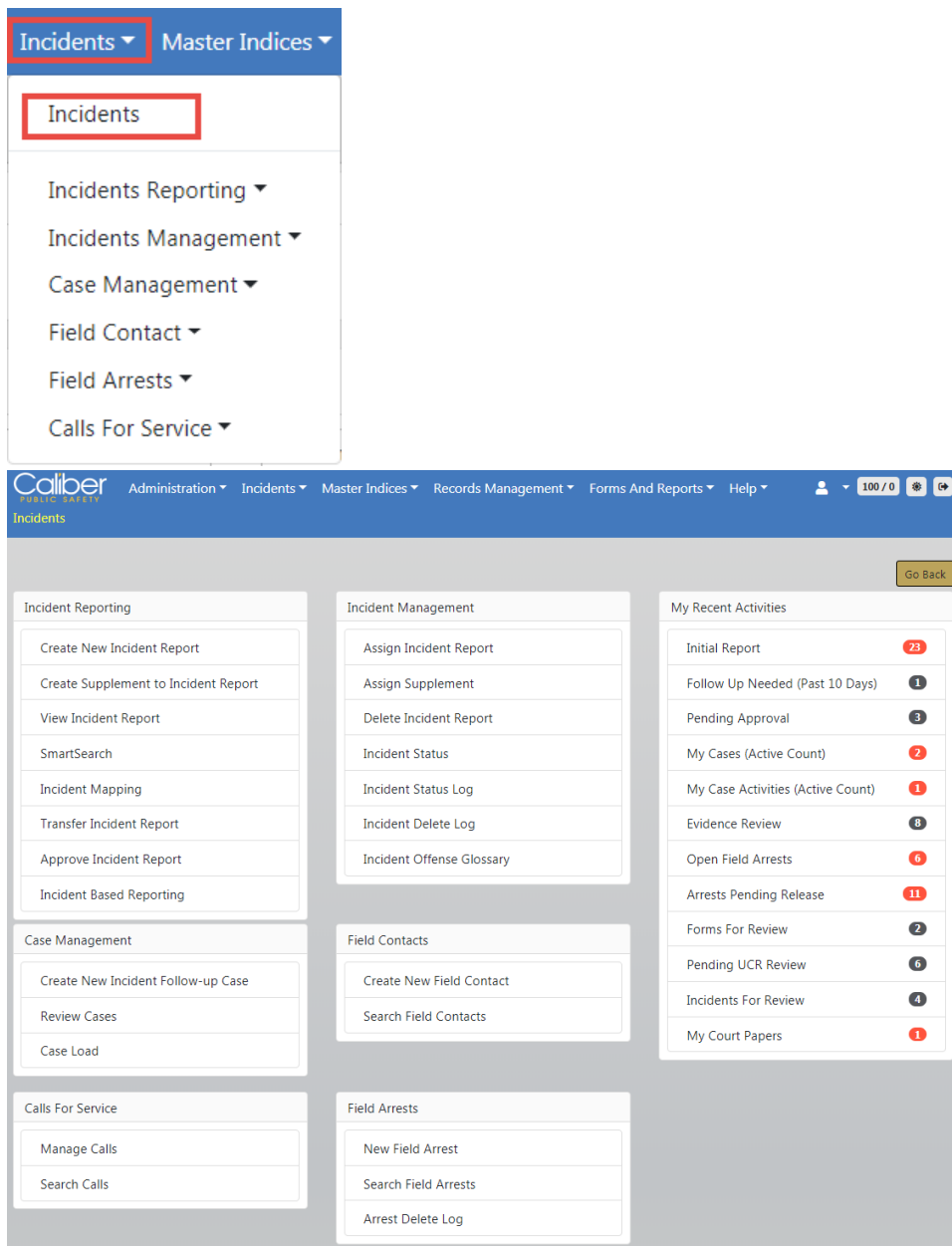


## Incidents Button

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



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



Your *Recent Activities* also appear on right of this screen.

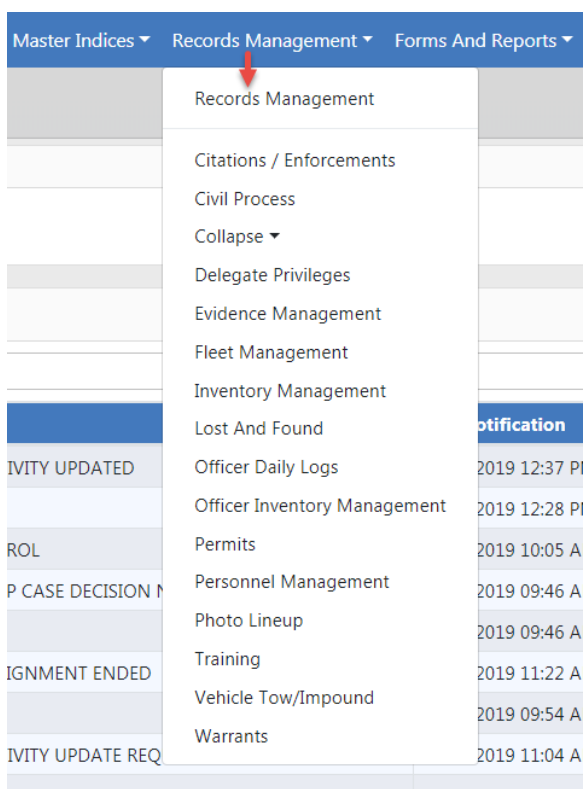
## Master Indices Button

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

information, see "Master Indices" on page 71. The menu options vary by agency and permissions.

## Records Management Button

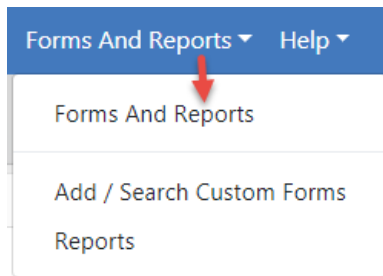
The **Records Management** button is located on the navigation bar at the top of the Online RMS window. The down arrow on the right of the button indicates additional menu options are available. Click on the **Records Management** button to display menu options. The menu options vary by agency and permissions.



## Forms And Reports Button

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

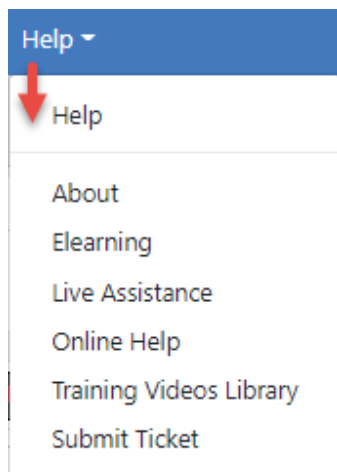
The menu options vary by agency and permissions.



For more information on *Custom Forms* and how to search for and view them, refer to “Custom Forms” on page 57.

## Help Options

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



### About

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

### Elearning

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

## Live Assistance

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

## Online Help

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

## Training Videos Library

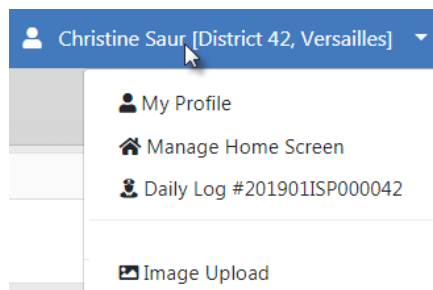
Beginning with Online RMS 11.4.0, agencies can enhance users' training and learning experience with the **Online Training** feature. The **Online Training** feature offers video-based learning to all users where agencies use and enable this feature.

## Submit Ticket

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

# User Information Menu

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



## My Profile

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

The screenshot shows the 'My Profile' page for Christine Saur. The page is divided into a left sidebar and a main content area. The sidebar contains the user's name, ID, status, type, organization, home agency, officer status, and employee status. It also lists 'User Quick Links' such as 'Change Password', 'Change Security Questions', 'Change Home Agency', and 'Create Assignment'. Below these are 'Go To' links for 'Profile Information', 'Preferences', 'Subscriptions', 'Officer Information', and 'Account History'. The main content area is titled 'Profile Information' and includes a 'Go Back' and 'Update' button. Under 'User Information', there is a profile picture placeholder with a question mark and several input fields: 'FIRST NAME' (Christine), 'MIDDLE NAME' (empty), 'LAST NAME' (Saur), 'TELEPHONE' (empty), 'E-MAIL' (CS), and 'E-MAIL ENABLED' (checked).

For more information, refer to "My Profile" on page 45.

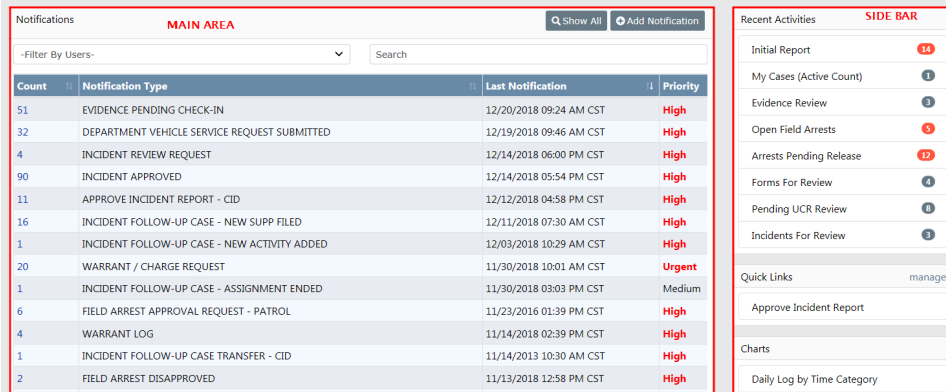
## Manage Home Screen

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

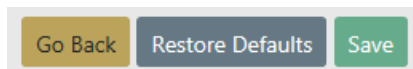
The screenshot shows the 'Manage Home Screen' page. At the top, there are 'Go Back', 'Restore Defaults', and 'Save' buttons. Below the buttons is a text box with instructions: 'This page allows you to change the content of your home page. There are two areas to add content to: the main area and side bar. To add an item to either area, click on the + icon at the top and select an item. Once an item is added, you may need to enter some extra information. You can then place the item where you want it by placing the mouse over the item's header and dragging it. You can remove an item by clicking on the - icon.' A red arrow points from the text to the '+' icon in the 'Main Area' header. Below the instructions are two columns: 'Main Area' and 'Side Bar'. The 'Main Area' contains 'Notifications' (with a sub-form for 'Number of Notifications' set to 5) and 'Charts'. The 'Side Bar' contains 'My Recent Activities', 'Quicklinks', 'Chart Menu', and 'External Links'. Each item has a '+' icon at the top right and a '-' icon at the bottom right.



The *Main Area* and *Side Bar* of the Front Screen, or Home Page, is shown in the figure below.



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

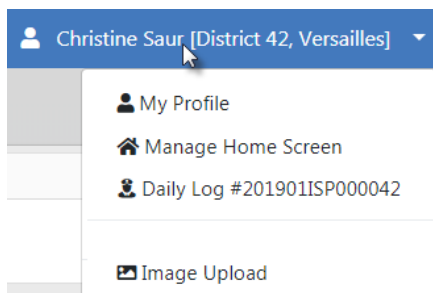


For more information on accessing the **Home Page** refer to "Home Page " on page 8.

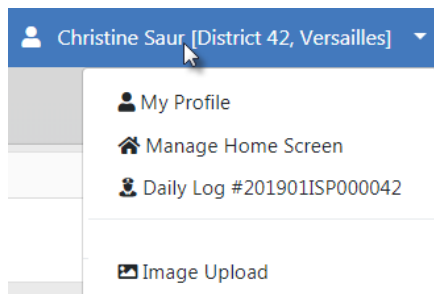
## Daily Log

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

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



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

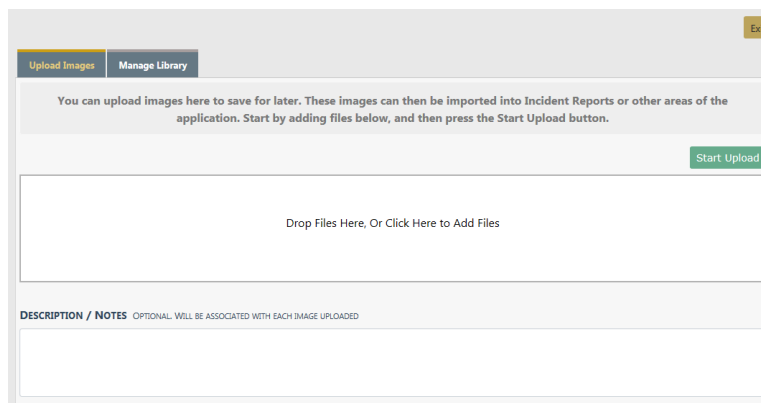


For more information on the Daily Log, refer to "Officer Daily Log" on page 447.

## Image Upload

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

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

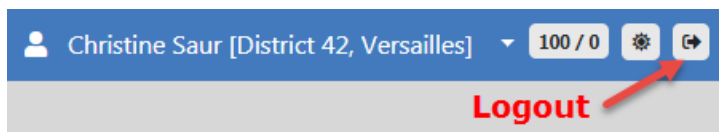


For more information on uploading images to your personal RMS Image Library, refer to "Image Library" on page 65.

## Logout

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

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



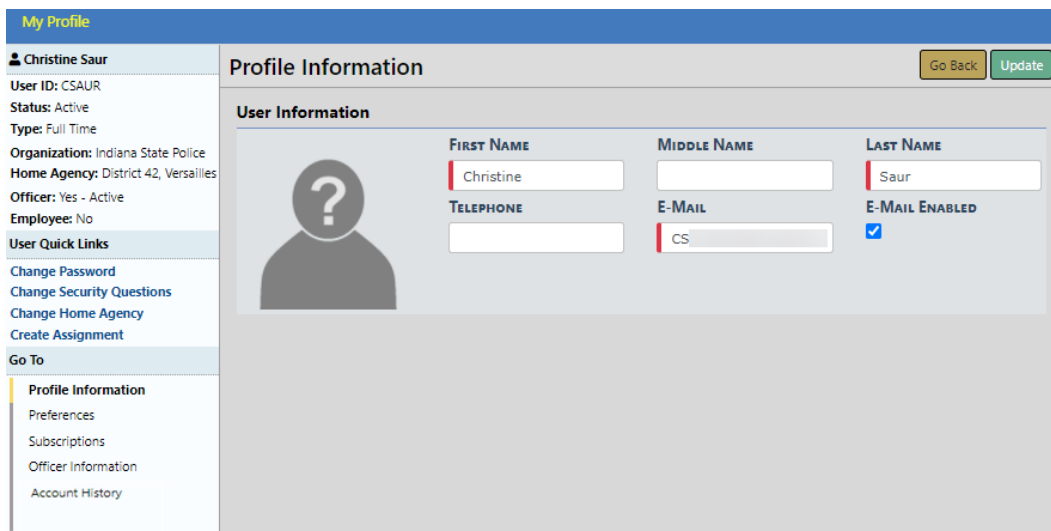
Once logged out, click the X on the upper right corner of the window to close.



# Chapter 3. My Profile

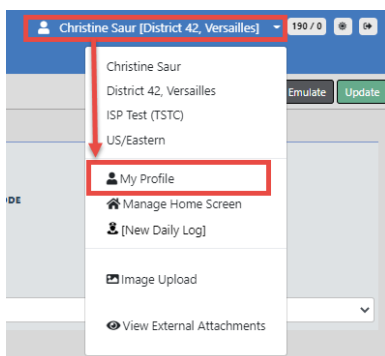
## My Profile Overview

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



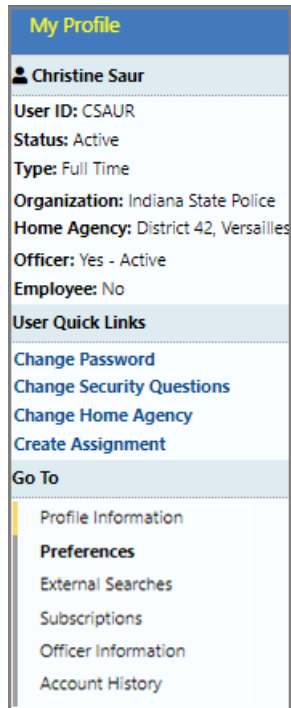
## Access My Profile

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



## My Profile Page Layout

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



### ***User Information***

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

This section is read-only.

### ***User Quick Links***

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

### Change Password

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

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

### Change Security Questions

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

### Change Home Agency

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

### Create Assignment

Use this link to create an assignment, if applicable.

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

### Go To

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

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

Click a tab to display settings for that tab. For example, click Preferences to view and update notification and other preference settings.

The Profile Information tab opens by default when you access *My Profile*.

Click on a tab under the **Go To** section of the left sidebar to access the tab. Profile Information is used in the below example.

The screenshot displays the 'My Profile' interface. On the left, a sidebar lists user details for Christine Saur: User ID: CSAUR, Status: Active, Type: Full Time, Organization: Indiana State Police, Home Agency: District 42, Versailles, Officer: Yes - Active, and Employee: No. Below this are 'User Quick Links' such as 'Change Password', 'Change Security Questions', 'Change Home Agency', and 'Create Assignment'. A 'Go To' section lists 'Profile Information' (highlighted with a red arrow), 'Preferences', 'External Searches', 'Subscriptions', 'Officer Information', and 'Account History'. The main content area is titled 'Profile Information' and contains a 'User Information' section with a profile picture placeholder (a question mark in a circle). The form fields are: FIRST NAME (Christine), MIDDLE NAME (empty), LAST NAME (Saur), TELEPHONE (empty), E-MAIL (CS), and E-MAIL ENABLED (checked). 'Go Back' and 'Update' buttons are located at the top right of the main section.

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

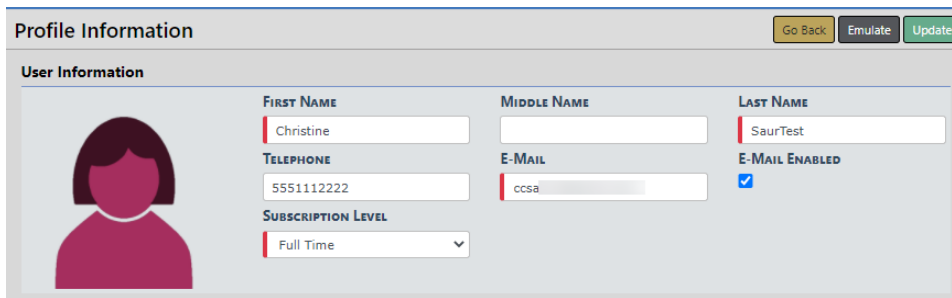
**Refer to the following for tab details:**

- "Profile Information Tab" below
- "Preferences Tab" on the facing page
- "External Searches Tab" on page 51
- "Subscriptions Tab" on page 52
- "Officer Information Tab" on page 53
- "Account History Tab" on page 55

## Profile Information Tab

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





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" (Christine), "MIDDLE NAME" (empty), "LAST NAME" (SaurTest), "TELEPHONE" (5551112222), "E-MAIL" (ccsa), and "SUBSCRIPTION LEVEL" (Full Time). There is also a checkbox for "E-MAIL ENABLED" which is checked.

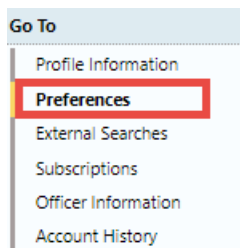
Make any necessary changes then click the **Update** button to save changes.

## Preferences Tab

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

You can update your preferences from *My Profile*.

1. Access *My Profile* page. For instructions, refer to "My Profile Overview" on page 45.
2. Click **Preferences** under the *Go To* section.



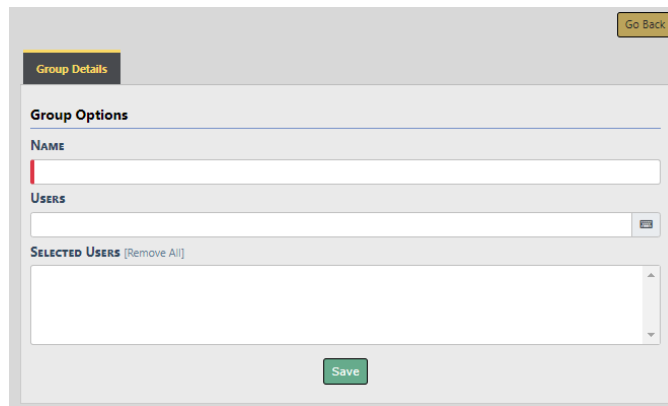
3. *Preferences* opens.

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



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

Name	Users	Actions
Daytime Officers	Kris LeClaire Johnny Smith	[Edit] [Delete]
Daytime Officers	Guy Schedule Felix Unger	[Edit] [Delete]
Weekend Officers	Samual Adams Howard Fine	[Edit] [Delete]

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



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

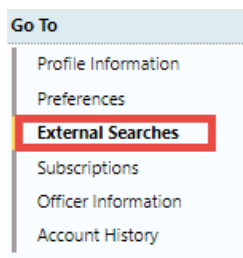
- b. Optionally, click on the edit icon  to edit an existing group .
- c. Optionally, click on the trash icon  to delete an existing group.

## External Searches Tab

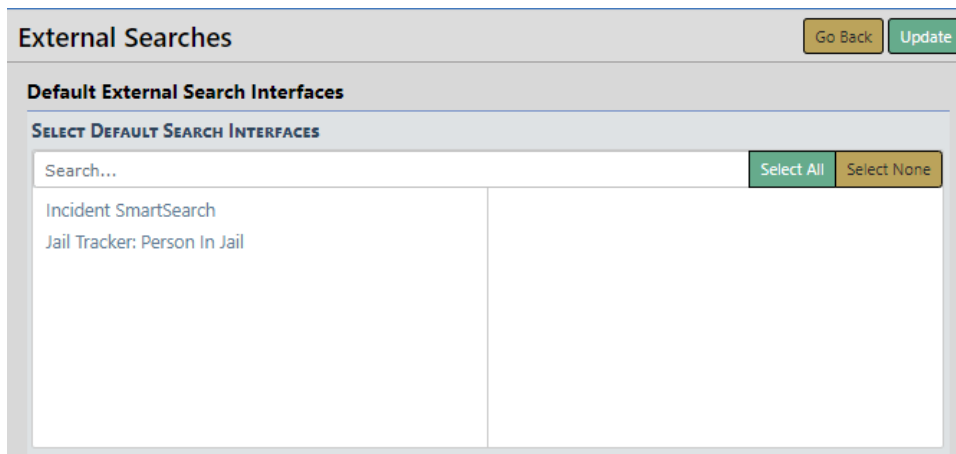
Caliber Public Safety Online RMS allows users to set their default external search interfaces.

You can access your external searches from *My Profile*.

1. Access *My Profile* page. For instructions, refer to "My Profile Overview" on page 45.
2. Click **External Searches** under the *Go To* section.

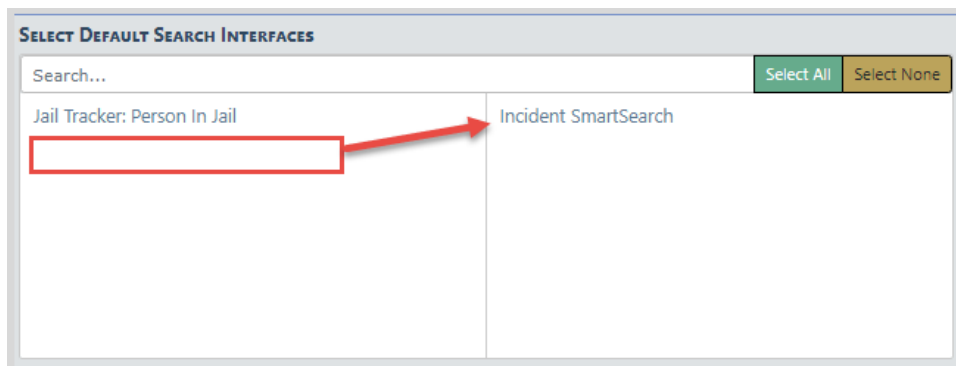


3. *External Searches* opens.



The available search interfaces appear on the left.

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



Select as many available interfaces as you wish.

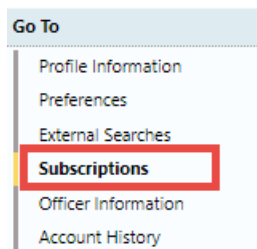
To **deselect**, click on an interface on the right and it moves back to the available column on the left.

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

## Subscriptions Tab

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

1. Access *My Profile* page. For instructions, refer to "My Profile Overview" on page 45.
2. Click **Subscriptions** under the *Go To* section.



The screenshot shows the 'Subscriptions' tab selected in a navigation bar. Below the navigation bar is a table with the following data:

Name	Type	Index Name	Reason	Creation Date	Actions
Vehicle	Index Accessed	, 336	Asdf	05/04/2017	
Property	Index Accessed	APPLIANCE 1588	Asdf	05/03/2017	

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

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

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

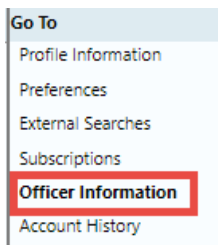
For example, you can **Subscribe** to Williams Jones' master person record to receive notification when someone updates information on his master person record.

For more information on creating a **Subscription**, refer to "Subscribe to Master Records" on page 110.

## Officer Information Tab

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

1. Access *My Profile* page. For instructions, refer to "My Profile Overview" on page 45.
2. Click **Officer Information** under the *Go To* section.



3. *Officer Information* opens.

**Officer Information** Go Back

**Officer**

<b>FIRST NAME</b> Chief3	<b>MIDDLE NAME</b>	<b>LAST NAME</b> State
<b>TITLE</b> Assistant Chief	<b>SUFFIX</b>	<b>AGENCY</b> District 21, Toll Road - SC
<b>BADGE #</b> 1234567890	<b>DISPATCH ID</b>	<b>CAD BADGE</b> ⓘ

Patrol  Detective  Active

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

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

**Officer Information** Go Back Emulate Save

No Officer Record Exists for This User

[Click Here to Add One](#)

4. Complete each of the fields for which you have information. Any field with a red left-hand border is a required field. You must complete required fields to continue.

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.

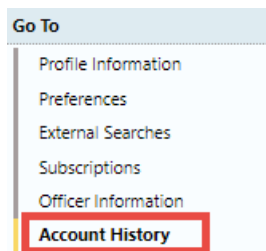
5. Click the **Update** button on the top right of the form to save.

## Account History Tab

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

You can view your account history from *My Profile*.

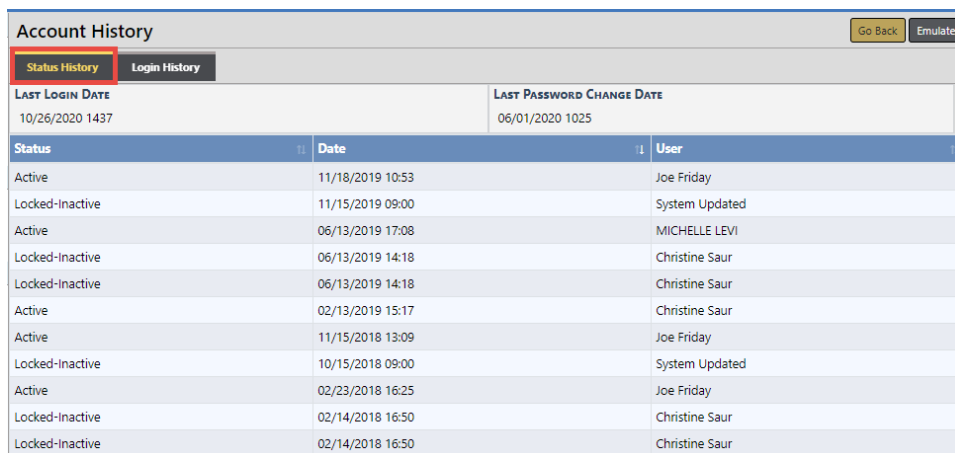
1. Access *My Profile* page. For instructions, refer to "My Profile Overview" on page 45.
2. Click **Account History** under the *Go To* section.



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

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

The *Status History* tab opens by default.



Account History			
LAST LOGIN DATE		LAST PASSWORD CHANGE DATE	
10/26/2020 1437		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	

**Account History** Go Back Emulate

Status History **Login History**

10 << < > >> 422 1 / 43

Login Date	Logout Date	City	State	Country	Latitude	Longitude	Login Failed
10/26/2020 14:37:41		Oelwein	US-IA	US	42.6811	-91.91311	No
10/26/2020 09:49:08	10/26/2020 14:04:31	Oelwein	US-IA	US	42.6811	-91.91311	No
10/23/2020 09:26:24	10/23/2020 14:11:27	Oelwein	US-IA	US	42.6811	-91.91311	No
10/22/2020 14:42:13	10/22/2020 19:34:07	Oelwein	US-IA	US	42.6811	-91.91311	No
10/22/2020 09:13:58	10/22/2020 13:32:10	Oelwein	US-IA	US	42.6811	-91.91311	No
10/21/2020 16:34:26	10/21/2020 18:56:48	Oelwein	US-IA	US	42.6811	-91.91311	No
10/21/2020 11:53:19	10/21/2020 16:34:08	Oelwein	US-IA	US	42.6811	-91.91311	No
10/21/2020 08:52:26	10/21/2020 11:32:44	Oelwein	US-IA	US	42.6811	-91.91311	No
10/20/2020 14:29:20	10/20/2020 18:57:22	Oelwein	US-IA	US	42.6811	-91.91311	No
10/20/2020 09:22:22	10/20/2020 10:57:36	Oelwein	US-IA	US	42.6811	-91.91311	No



# Chapter 4. Custom Forms

## Search For and View Custom Forms

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

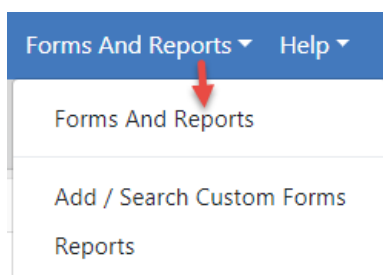
Online RMS 11.3.2 and above supports **Community Reporting** of minor crimes, tips, and other police-related events. The **Community Reporting** feature leverages the power of Online RMS *Custom Forms* for your agency to embed a *public form* in an existing website using only a couple lines of HTML code.

For more information on **Community Reporting**, or public forms, refer to “Community Reporting” on page 241.

To search for and view Custom Forms follow these steps:

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

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



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

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

Creator	Create Date	Officer	Agency	Status	Record Details	Actions
System User, Auto	05/22/2020 1517		Caliber Public Safety PD	Reviewed	Type: Incidents	

5. Click the **View icon** to view the form.

For more information on *Custom Forms* and how to enable the feature, refer to “Custom Forms” on page 57.

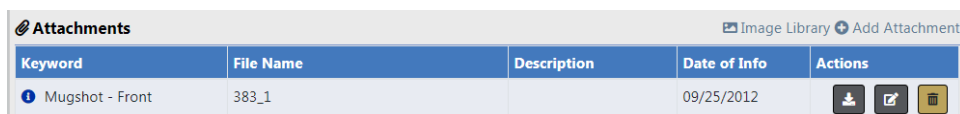
For more information on adding and managing Custom Forms, refer to the *Caliber Online RMS Admin Guide*, or your system administrator.

# Chapter 5. 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.

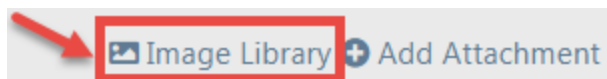
Attachments appear in a grid, or columnar format.



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


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

Click on the **Image Library** link to access your personal RMS image library that contains images uploaded by you from a mobile device, or other devices. For more information, refer to "Image Library" on page 65.



## 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.

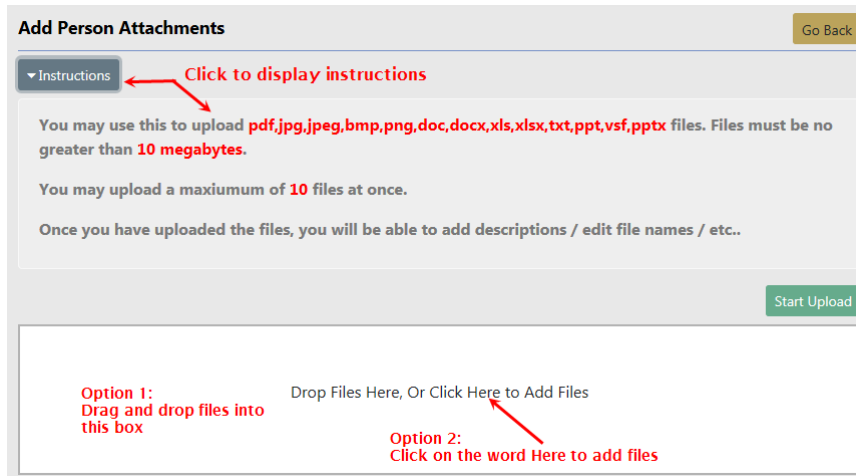


Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1		09/25/2012	[Download] [Edit] [Delete]

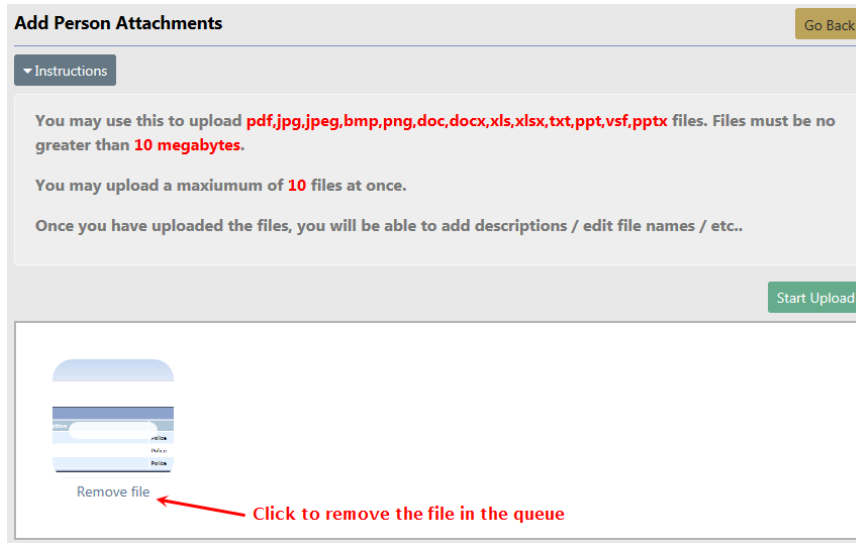
1. Click on the **Add Attachment** link to begin the upload process.

**NOTE:** Attachments are added to a temporary holding place or queue; you must then upload the files.

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



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



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

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


The screenshot shows a form for adding an attachment. It has several sections: 'TYPE OF ATTACHMENT' with a dropdown menu set to 'Image'; 'KEYWORD' with a dropdown menu set to 'Image'; 'FILE NAME' with a text input field containing 'AddArrestChargeCode.png'; 'DATE OF INFO' with a date input field set to '03/19/2019' and a calendar icon; and 'DESCRIPTION' with a large empty text area. There are three 'Save & Close' buttons: one at the top right, one at the bottom center, and one at the 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 of data can be uploaded at one time.

## Edit Attachments

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

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

Keyword	File Name	Description	Date of Info	Actions
PDF	TestDocument.txt		11/22/2019	  

Red arrows point from the text labels 'Download', 'Edit', and 'Delete' to the corresponding icons in the Actions column of the table.

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

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

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

**Edit Person Attachment**
Go Back

---

**ATTACHMENT TYPE**  
Person Image ▼

**KEYWORD**  
Image ▼

**FILE NAME**  
383\_1

**DESCRIPTION**

**PHOTO TYPE**  
Mugshot - Front ▼

**PRIMARY IMAGE**

**PHYSICAL DESCRIPTION**  
Height: 5' 10"; Weight: 195; Eye Color: Blue; Hair Color: Blond or Strawberry; Hair Style: Braided; Hair L ▼ +

**DATE OF INFO**  
09/25/2012 📅


Update




**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

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.

Attachments				+ Add Attachment
Keyword	File Name	Description	Date of Info	Actions
PDF	TestDocument.txt	<span style="color: blue;">i</span>	11/22/2019	<div style="display: flex; gap: 10px;"> <div style="text-align: center;">   <span style="color: red;">Download</span> </div> <div style="text-align: center;">   <span style="color: red;">Edit</span> </div> <div style="text-align: center;">   <span style="color: red;">Delete</span> </div> </div>


**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.

Attachments <span style="float: right;">+ Add Attachment</span>				
Keyword	File Name	Description	Date of Info	Actions
PDF	TestDocument.txt		11/22/2019	  

**Download** → **Edit** → **Delete**

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





# Chapter 6. Image Library

## Image Library Overview

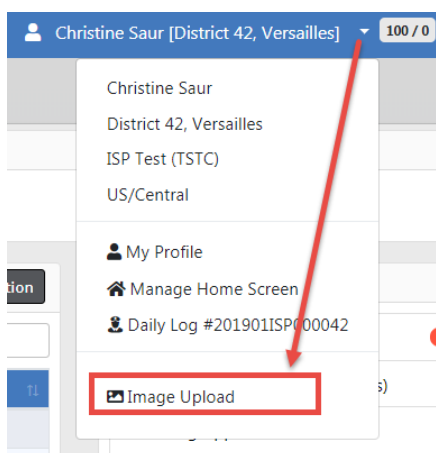
The **Image Library** is a personal RMS image library that contains images uploaded by you from a mobile device, or other devices. Only your user account has access to these personal images.

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

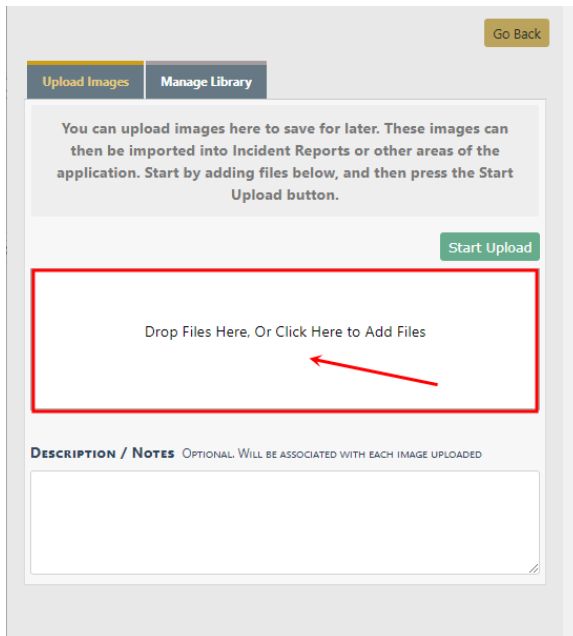
## Upload Image

You can upload images into the Image Library from your computer, or directly from your mobile device.

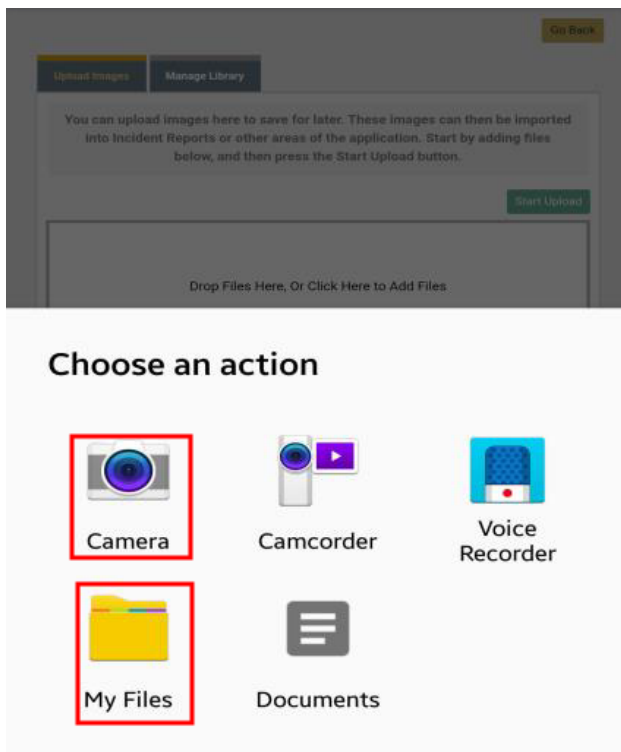
Click on the **My Profile** icon, then click **Image Upload**.



**Drop** files into the box, or click **Add Files**.

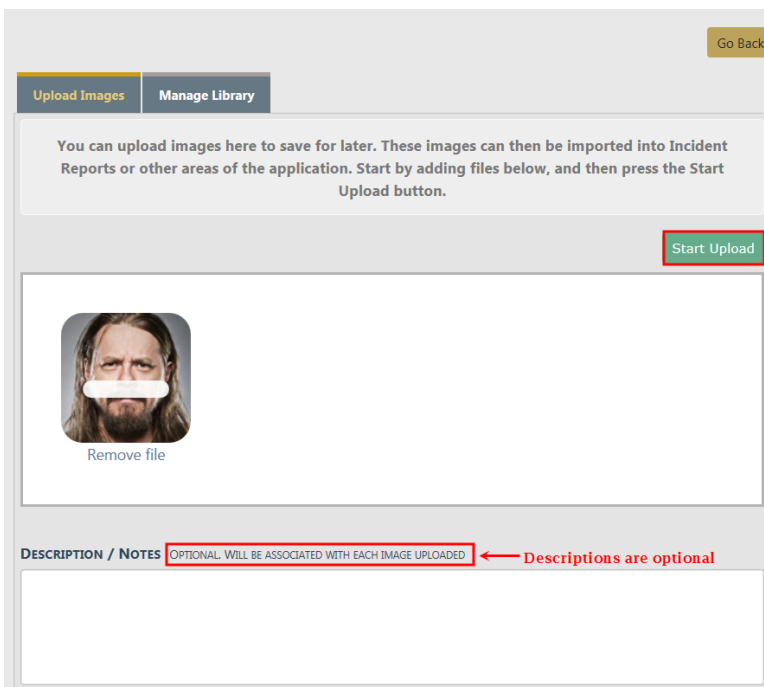


If uploading from your *mobile device*, select **Camera** to take a photo and upload directly from the camera on your mobile device, or select **My Files** (or local folder) to upload from device storage.



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

Click **Start Upload**.



Click **Go Back** when the upload finishes.

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

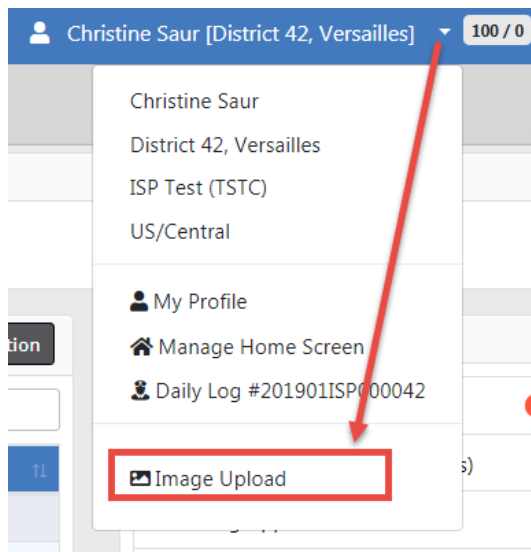
You can also attach library images to incidents, arrests, and master person records.

For more information on delet

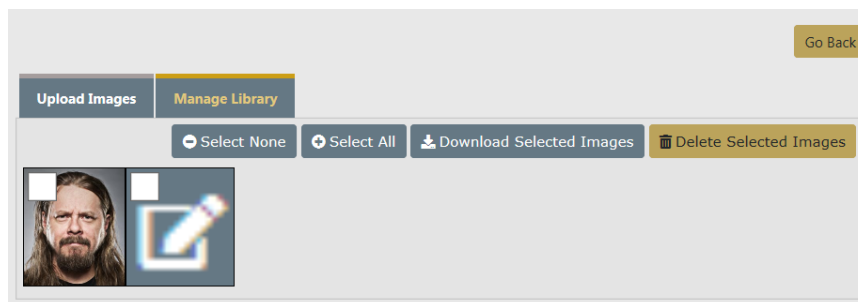
## Manage Library

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

Click on the **My Profile** icon, then click **Image Upload**.

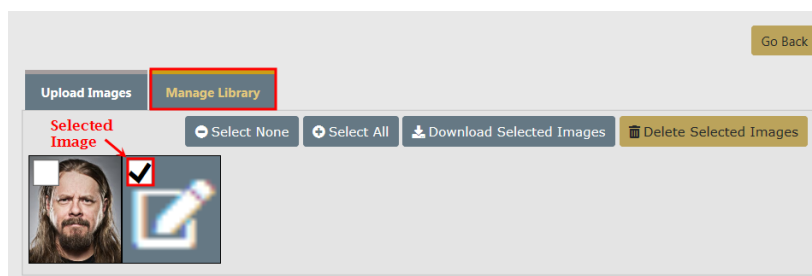


Click on the **Manage Library** tab to access your uploaded image files.



## Delete Image Files

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



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

Message From RMS

---

Are You Sure You Want to Delete 1 Images?

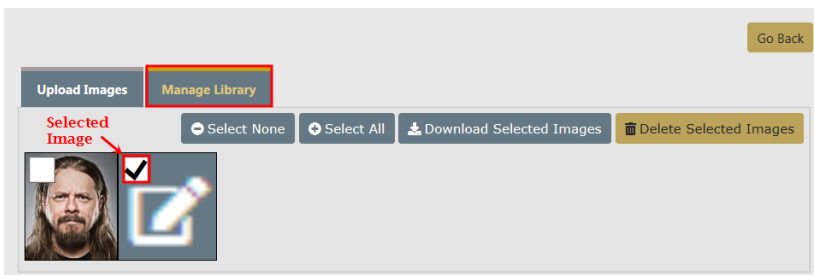
---

No Yes

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

## Download Image Files

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



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

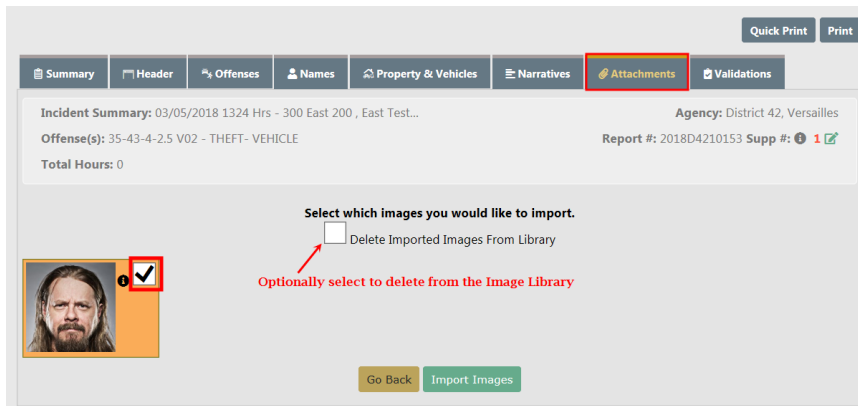
## Import Images From Library

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

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



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



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

File And Image Attachments Image Library Add Attachment Image Viewer Download Selected Attachments

	Keyword	File Name	Description	Date of Info	Supp #	Actions
<input type="checkbox"/>	Image File	3079_1_1		03/27/2019	1	

# Chapter 7. Master Indices

## Master Indices Overview

**Master Indices** are centralized pieces of data that are accessed from different modules of the system for consistency. Each index is represented only once, such as a person, an address, a vehicle, etc. For example, all modules of Online RMS access the same person information for Joe Smith with SSN 123-12-1234 and the same vehicle information for VIN ABC1235223DE45455.

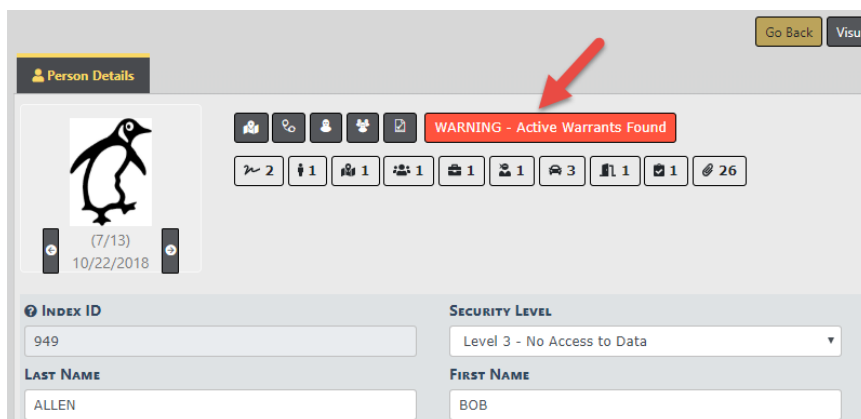
The following are considered **Master Indices**:

- Person

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

**Note:** If configured for your agency, you can take photos directly from the Online RMS Field Arrest or Master Person Index record using the **Hunter Camera** integration software installed on your local machine. The software associates the images with the *Master Person Index* record. For more information on the camera software, refer to "Hunter Camera" on page 735.

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



For more information on active warrants, refer to "Activate Warrant" on page 509.

- Address

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

- Organization

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

- Vehicle

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

- Property

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

- Gang

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

## Master Index Security

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



## Master Indices Security Levels

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.

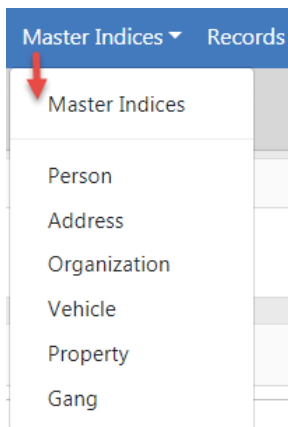
## User Account Index Security Levels

- **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**.

## Accessing Master Indices

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



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

You can update and print records, but you cannot delete them. **Master Index** records also provide Total Involvements of the record within Online RMS, Common Event Associations, and the ability to create a Subscription that notifies you when a particular record is accessed, updated, and/or associated to a module within RMS. You can also use **SmartSearch** in the person section for locating person involvement in incidents across all counties in the Online RMS system within your agency's state.

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

100 hours unless your administrator has given you access to do so, but you can add additional information at any time.

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

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

## Searching Master Records

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

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

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

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

Person Search

Mug Shot Search - By Physical Description Add Person

Person Address Organization Vehicle Property Gang

LAST NAME FIRST NAME MIDDLE NAME

TITLE DOB AGE

RACE SEX INDEX ID

DRIVERS LICENSE DRIVERS LICENSE STATE SSN

NAME TYPE CREATOR

CREATION DATE FROM CREATION DATE TO

PHONETIC SOUNDEX CALIBER POWER SEARCH SEARCH PREFERENCE

ALL ANY

ADDITIONAL SEARCH CRITERIA

Search External Systems

Go Back Reset Search

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

## Person Search

A search can be done with full or partial text in any of the fields provided. Searching with less information yields more results. If too many results display, you can click on the **Refine Search** button on the top right of the *Search Results* window to add or change your search criteria.

Person Search

Mug Shot Search - By Physical Description Add Person

Person Address Organization Vehicle Property Gang

LAST NAME FIRST NAME MIDDLE NAME

TITLE DOB AGE

RACE SEX INDEX ID

DRIVERS LICENSE DRIVERS LICENSE STATE SSN

NAME TYPE CREATOR

CREATION DATE FROM CREATION DATE TO

PHONETIC SOUNDEX CALIBER POWER SEARCH SEARCH PREFERENCE

ALL ANY

ADDITIONAL SEARCH CRITERIA

Search External Systems

Go Back Reset Search

### ***Search Mug Shots By Physical Description***

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

Person Search / Physical Description Search

Go Back Help

Q Search

<b>HEIGHT FROM</b> -Select- ' -Select- "	<b>HEIGHT To</b> -Select- ' -Select- "	<b>WEIGHT</b> To
<b>SEX</b> -Select-	<b>RACE</b> -Select-	<b>ETHNICITY</b> -Select-
<b>EYE COLOR</b> -Select-	<b>SKIN COLOR</b> -Select-	<b>BUILD</b> -Select-
<b>HAIR COLOR</b> -Select-	<b>HAIR STYLE</b> -Select-	<b>HAIR LENGTH</b> -Select-
<b>FACIAL HAIR</b> -Select-	<b>GLASSES</b> -Select-	<b>AGE</b> To
<b>IMAGE TYPE</b> -Select-	<b>IMAGE DATE FROM</b> 📅	<b>IMAGE DATE To</b> 📅

**Optional**

<b>SMT TYPE</b> -Select-	<b>SMT LOCATION</b> -Select-	<b>SMT DESCRIPTION</b> 
-----------------------------	---------------------------------	----------------------------

**GANG MEMBER**

Limit Results To 50 Records

Reset Search

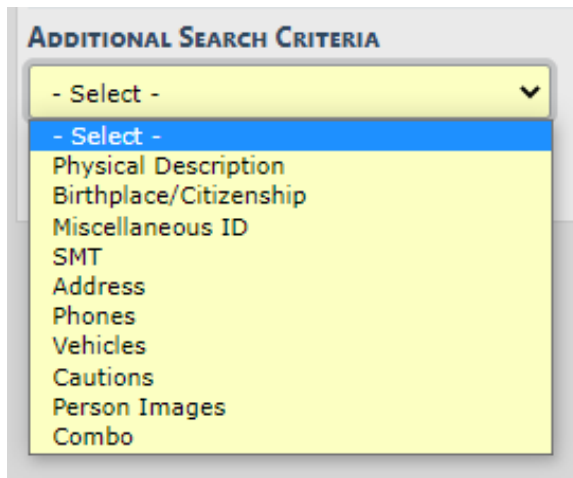
Enter one or more search terms and click Search to continue

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

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

### ***Additional Search Criteria***

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




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

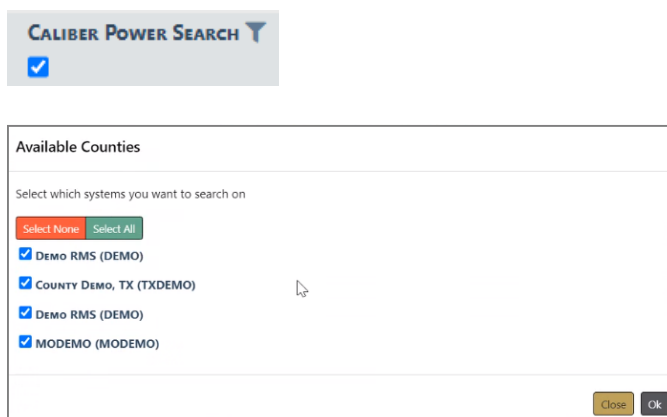
**Note:** Choose **Person Images** to search images by photo type (mugshots, etc.) and by date range.

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

## Power Search


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

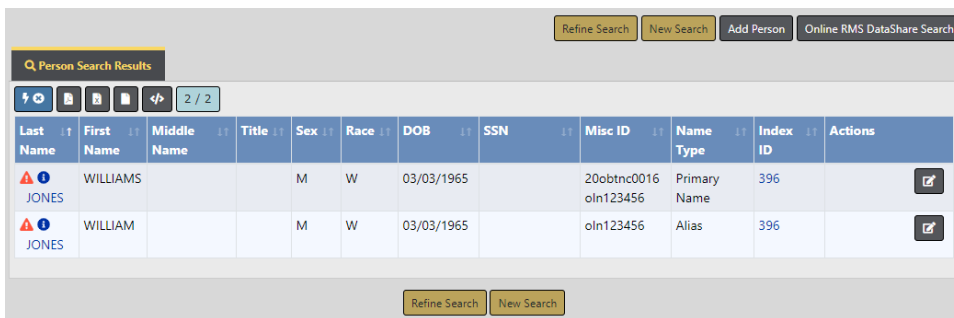
Check the **Caliber Power Search** box, then click on the **funnel**  to choose which counties you would like to include in your search.





The list of available counties varies by agency.

## Search Results

Every master record will be assigned an Index ID number by Online RMS when it is created. Click on the **Index ID** or the **Last Name** in the *Search Results* window to open the *View Person Details* window to view a specific record. Select the edit icon  on the *Search Results* page to update a record.



Last Name	First Name	Middle Name	Title	Sex	Race	DOB	SSN	Misc ID	Name Type	Index ID	Actions
JONES	WILLIAMS			M	W	03/03/1965		20obtnc0016 oln123456	Primary Name	396	
JONES	WILLIAM			M	W	03/03/1965		oln123456	Alias	396	

## View Person Details

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

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



Person Search / Person Search Results / View Person Details (JONES,WILLIAMS)

Go Back Print Report Visualization Tool Create Photo Lineup Update Details Manage Subscription

Person Details Person Summary **Two tabs**

Audit Off

The right side of the screen summarizes the association to the person throughout Online RMS.

Click on the total count to view records

**Total Involvements**

Incidents	09/24/2018	22
FieldArrest	08/03/2017	20
CourtPapers	01/20/2015	1
CustomForms	04/10/2014	8

**Incident By Role**

Arrestee	3
Offender	6
Victim	11
Other	2

**Common Event Associations**

Address	15
Gang	65

**Caution Codes**

Code	Comments	Start Date	Expiration Date	Next Review Date	Date Of Info
Assaultive/Combative		08/03/2017			08/03/2017

Go Back Print Report Visualization Tool Create Photo Lineup Update Details Manage Subscription

Person Details Person Summary

**Total Involvements**

Incidents	09/24/2018	22
FieldArrest	08/03/2017	20
CourtPapers	01/20/2015	1
CustomForms	04/10/2014	8

**Incident By Role**

Arrestee	3
Offender	6
Victim	11
Other	2

**Common Event Associations**

Address	15
Gang	65
Organization	6
Person	29
Property	1
Vehicle	5

**User Subscriptions**

Access	3
Associate	2
Update	2

**By Offense Category**

Property	10
Person	5
Vehicle	9
Society	6
Drug	2

**By Incident Status**

Initial Report	13
Approved Report	9

**Involved Incidents**

Expunge	Report#	Agency	Status	Offense(s)	Involved Role	Date
<input type="checkbox"/>	2018D4210183	District 42, Versailles	Pending Approval	35-43-2-1 B01 BURGLARY- AIRPORT	Victim	09/24/2018

### Master Index Associations

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

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

**DRIVERS LICENSE STATE**  
Alaska

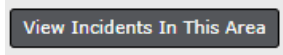
**CELL PHONE**  
--

**RESIDENCE ADDRESS**  
126 North 750 West IN


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



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

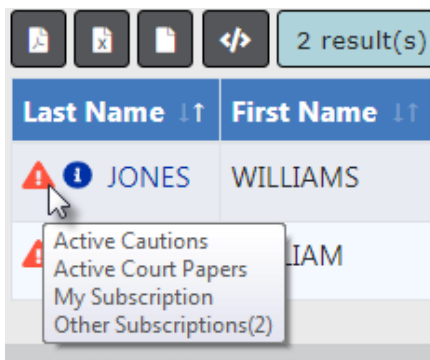


Click on the **Print Report** button to print the master person record. For details, refer to "Print Master Person Records" on page 107.

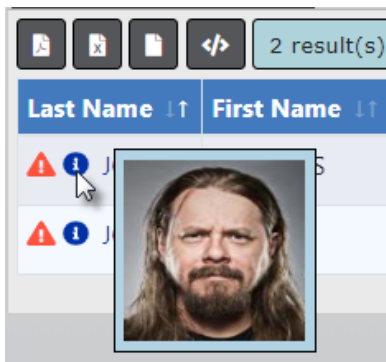
If you search the **Master Indices** from within a module (Incident Report, for example), a select icon  appears that allows you to select and use the record easily. It is highly recommended you review the existing information prior to using it. This gives you the opportunity to update or add additional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

### Person Active Alerts

A red *Alert Icon*, that appears next to the person's name in the *Person Search Results* window, indicates there are **Active Alerts** on that person. Hover your mouse over the *Alert Icon* to view a summary of the all the active alerts, or click on the *Alert Icon* to open details of all active alerts in a pop-up window.



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



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

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

System administrators with appropriate permissions can create custom Caution Codes, Caution Categories, and assign Caution Category Roles, allowing administration of Caution Codes by specified user Roles and Categories. For example, you could have a specialized unit that keeps track of persons on probation, and only system administrators or users assigned to this Role can add, edit or delete these codes on person records.

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

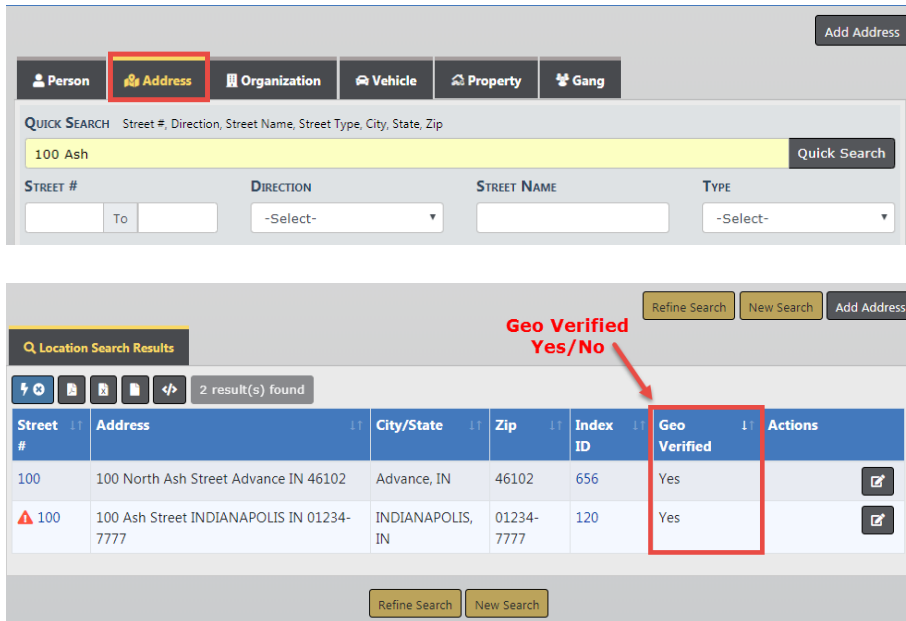
### **View Mobile Person Results in Online RMS**

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

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

## Address Search

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



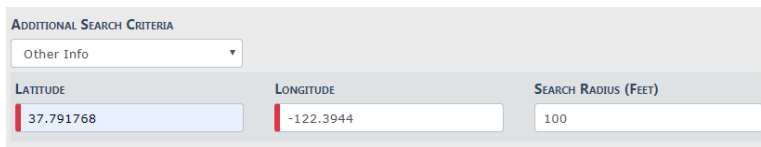
In the results list, click on an Index ID link to quickly view address details.

Zip	Index ID	Geo Verified
46102	656	Yes

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

CREATOR	CREATION DATE FROM	CREATION DATE TO
Christine Saur - District 42, Versa	04/01/2019	12/01/2019

You can search for address records by Latitude and Longitude using the **Search Radius (Feet)** option under *Additional Search Criteria* located at the bottom of the page.



ADDITIONAL SEARCH CRITERIA		
Other Info		
LATITUDE	LONGITUDE	SEARCH RADIUS (FEET)
37.791768	-122.3944	100

For instructions on adding an address to the Master Index, refer to "Adding Address" on page 94.

## Adding Master Index Records

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

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

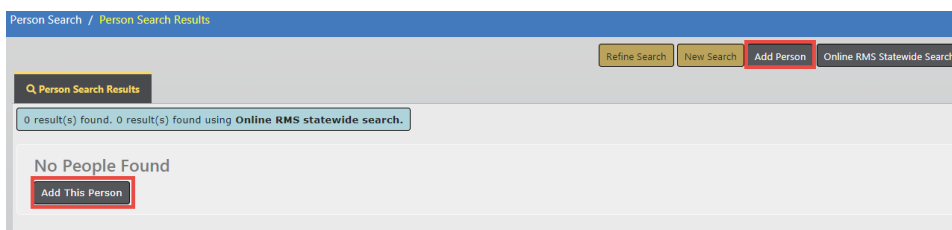
For details on accessing the Master Indices, refer to "Accessing Master Indices" on page 74.

For details on searching for Master Index records, refer to "Searching Master Records" on page 75.

## Adding Person

After searching for a Master Person record, the *Person Search Results* screen either displays a list of names that match your search criteria, or it indicates no records are found. For more information about searching Master Indices refer to "Searching Master Records" on page 75.

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



Person Search / Person Search Results

Refine Search New Search Add Person Online RMS Statewide Search

Person Search Results

0 result(s) found. 0 result(s) found using Online RMS statewide search.

No People Found

Add This Person

Caliber  
RMS11.5

Administration ▾ Incidents ▾ Master Indices ▾ Records Management ▾ Forms And Reports ▾ Help ▾

Person Search / Person Search Results / Add Person

**Person Information** Displays for users with Index Security Level greater than 1 2 Potential Duplicates Found Go Back

SECURITY LEVEL Checks for duplicates automatically

Level 1 - Access to a ▾

LAST NAME FIRST NAME MIDDLE NAME TITLE DOB SSN

LeClaire Christine -Select- -Select- -Select-

SEX RACE ETHNICITY DRIVER'S LICENSE NUMBER DRIVER'S LICENSE STATE

Female ▾ White ▾ -Select- -Select- -Select-

RESIDENCE PHONE CELL PHONE

Physical Description

HEIGHT WEIGHT EYE COLOR HAIR COLOR FACIAL HAIR

-Select- Feet -Select- Inches -Select- Pounds -Select- -Select- -Select-

HAIR LENGTH BUILD SKIN COLOR HAIR STYLE GLASSES DATE OF INFO

-Select- -Select- -Select- -Select- -Select- -Select-

Person Photo / Mugshot

SELECT PICTURE  Select From Library

Choose File No file chosen

PHOTO TYPE

Drivers License ▾

Residence Address ↻

ONE LINE ENTRY

You can type an address here and press the Geo Search button to search the address for you Geo Search

STREET # DIRECTION STREET NAME STREET TYPE DIRECTION SUFFIX SUB TYPE

-Select- -Select- -Select- -Select- -Select- -Select-

*Physical Description, Person Photo/Mugshot, Residence Address and Vehicle* are included on the **Add Person** screen. The system also checks for duplicate Master Person, Master Address, and Master Vehicle records automatically based on at least one of the following combinations per section:

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

### Person Information

- Security Level
- *Last Name and First Name*
- *SSN*
- *Last Name, First Name, and DOB*
- *DL Number and DL State.*

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

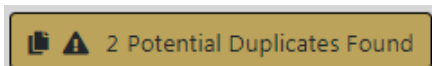
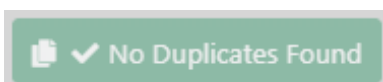
**Residence Address**

- *Street Number, Street Name, City, and State*

**Vehicle**

- *VIN*
- *License and State*

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



For more information about duplicate records, refer to "Duplicate Records" on page 100 .

You can add a person one of two ways:

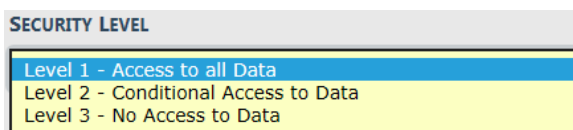
- Manually enter the data in each section.
- Import from external systems, if applicable to your agency.

**Manual Entry**

**Enter Person Information**

Enter the person information. Online RMS checks for duplicates automatically, and it displays a message indicating whether or not duplicates exist. For more information about duplicate records, refer to "Duplicate Records" on page 100.

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



For more information on Master Index Security, refer to "Master Index Security" on page 72.

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

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

### Enter Residence Address

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



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

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

After entering address data, Online RMS checks the *Master Address Index* for duplicates automatically, and it displays a message indicating whether or not duplicates exist. For more information about duplicate records, refer to "Duplicate Records" on page 100.


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





### Enter Vehicle Information

After entering initial vehicle data, Online RMS checks the *Master Vehicle Index* for duplicates automatically, and it displays a message indicating whether or not duplicates exist. For more information about duplicate records, refer to "Duplicate Records" on page 100.

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

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

### Save Entry

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

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

**+ Add Caution Code**

**Caution Code** ×

**CAUTION CODE**  
Known drug user

**DATE OF INFO**  
03/12/2019

**START DATE**  
03/12/2019

**EXPIRE DATE**

**NEXT REVIEW DATE**

**COMMENTS**

Cancel Save

- Choose a **Caution Code** from the drop-down list.
- Enter the **Date of Info**.
- Enter the **Start Date**.
- Optionally enter the **Expiration Date**, **Next Review Date**, and **Comments**.
- Click **Save** to create an **Active Alert** on that person. A red *Alert Icon* appears next to the person's name in the *Person Search Results* window, indicating **Active Alerts**. Refer to "Searching Master Records" on page 75 for details.

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

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

## Import/Update Person Results from External Systems

### Import New Person

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

### Caliber Mobile

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

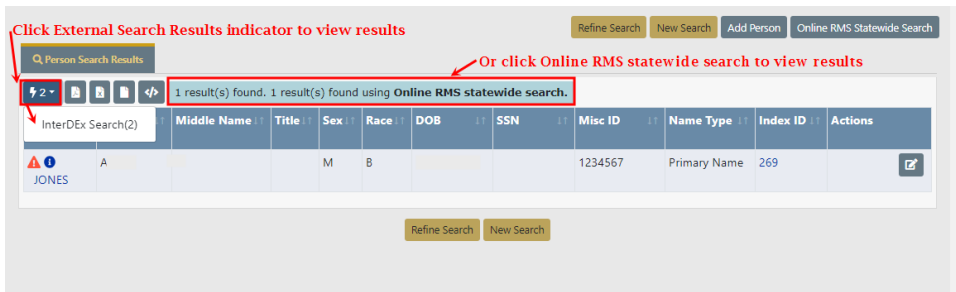
The screenshot shows the 'Person Search' interface with various search criteria fields. A red arrow points to the 'Add Person' button, which is highlighted with a red text box containing the text: "Mobile Results Available link appears here if applicable".

Select the person record from the *Mobile Results* screen.

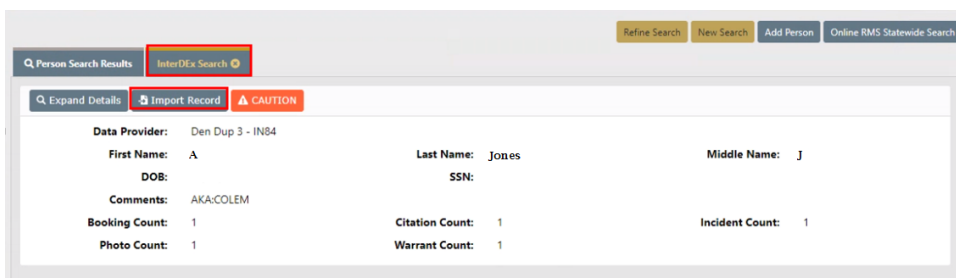
Mobile Results		
Image	Summary	Actions
	Last Name:Person First Name:Test Middle Name:N DOB:11/07/1979 Drivers License:CO111111 Weight:170 Eyes:BRO Hair:BLN Source:DMV:DMV Address:444 E 10th Ave Denver Colorado 80203 VIN:ABCDE1234FGH43273 Year:1993 Make:CHEV Model:BLA License:NJ	

### Statewide and InterDEX

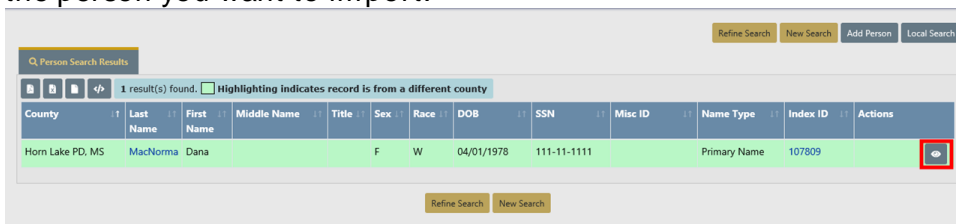
For agencies having access to *Online RMS Statewide*, *InterDEX*, and other External Person Search interfaces, click on **InterDEX Search** results indicator on the *Person Search Results* page, or the **Statewide Search** results to view potential matches outside of the Online RMS for the person.



For *InterDEx* search results, click on the option to **Import Record** to select from the available person demographic information from the external source to import.



For *Statewide* search results, click on the icon in the *Actions* column to the right of the person you want to import.



Click on the option to **Create Local Record** to select from the available person demographic information from the external source to import.



After selecting one of the above search results options, the available person, address, vehicle, and image data then imports into the **Add Person** screen. The system then searches for duplicate Master Person, Master Address, and Master Vehicle data automatically. For more information about duplicate records, refer to "Duplicate Records" on page 100 .

Manually update data as needed.

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

### Update Existing Person

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

### Caliber Mobile

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

For details on importing a person from Caliber Mobile refer to "Caliber Mobile" on page 91.

### Statewide and InterDEX

For *Statewide*, *InterDEX*, and other External Search Sources, updates to add data from the external data source can be made directly from the *Edit Person* page. Select the **SmartSearch** link to view potential matches from external data sources.

Select **Update Record** to choose information from the external data source to add to the existing person record, including photo if available.

## Adding Address

**NOTE:** When adding a new person, the address can be added as part of that process. For more information about adding a person, refer to "Adding Person" on page 85.

When an initial search of the database does not locate an existing address matching the search parameters, select the **Add Address** button to add the address. For more information about searching addresses, refer to the *Address Search* section of "Searching Master Records" on page 75 .

### *Specific Address*

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

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

**Address Information** Go Back

SECURITY LEVEL  
Level 1 - Access to all Data

ADDRESS SEARCH  
123 Main Street Geo Search

STREET # DIRECTION STREET NAME TYPE  
-Select- -Select- -Select- -Select-

DIRECTION SUFFIX SUB TYPE SUB #  
-Select- -Select- -Select-

CITY STATE ZIP  
-Select- -Select- -Select-

COUNTRY COUNTRY  
-Select- United States of America

COMMENTS

**Intersection**

STREET # DIRECTION STREET NAME TYPE  
-Select- -Select- -Select- -Select-

DIRECTION SUFFIX DISTANCE  
-Select- -Select-

**Geographical Information** Geo Verify

REPORTING AREA LATITUDE (Y) LONGITUDE (X)  
-Select- - - -

Go Back Save

**Perform one-line search or enter address into individual fields, then click Geo Verify to verify the address**

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

Example of an exact match:

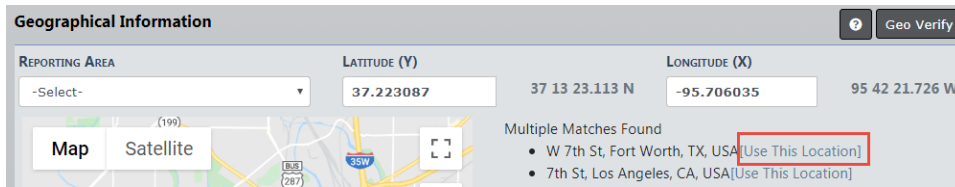
**Geographical Information** Geo Verify

REPORTING AREA LATITUDE (Y) LONGITUDE (X)  
-Select- 37.791768 37 47 30.365 N -122.3944 122 23 39.937 W

Exact Match Found  
• 123 Main St, San Francisco, CA 94105, USA (Exact Match Found)

Go Back Save

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



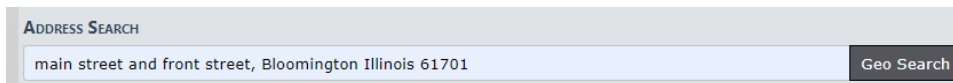
Once the correct **Geo Location** is selected and the coordinates are updated, verify the address information entered into each field.

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

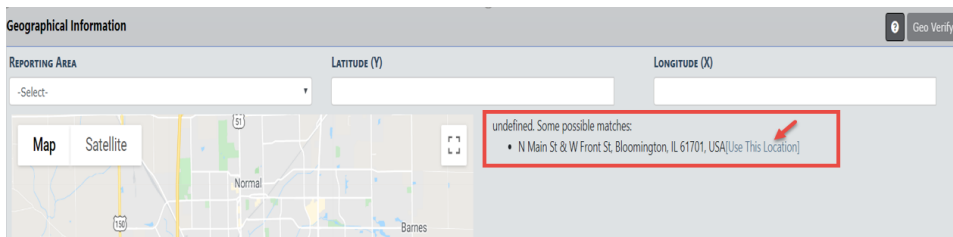
### Intersections

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

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



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



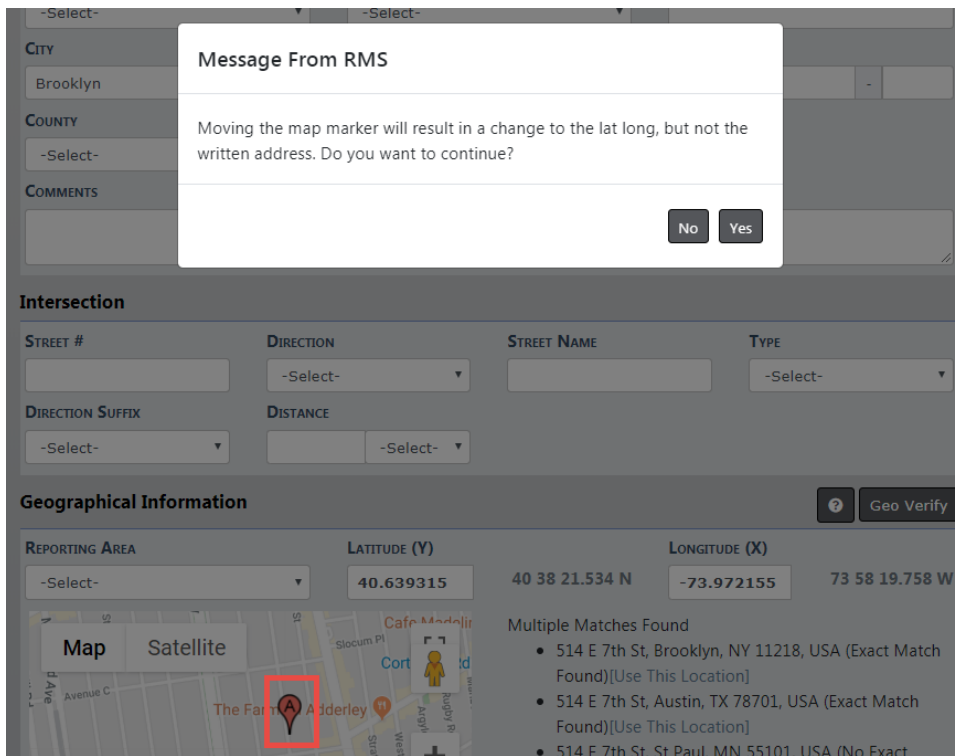


ADDRESS SEARCH			
main street and front street, Bloomington Illinois 61701			Geo Search
STREET #	DIRECTION	STREET NAME	TYPE
<input type="text"/>	North	Main	-Select-
DIRECTION SUFFIX	SUB TYPE	SUB #	
-Select-	-Select-	<input type="text"/>	
CITY	STATE	ZIP	
Bloomington	Illinois	61701 -	
COUNTY	COUNTRY		
-Select-	United States of America		
COMMENTS			
<input type="text"/>			
Intersection			
STREET #	DIRECTION	STREET NAME	TYPE
<input type="text"/>	West	Front	Street
DIRECTION SUFFIX	DISTANCE		
-Select-	<input type="text"/> -Select-		

### Dynamic Map Marker

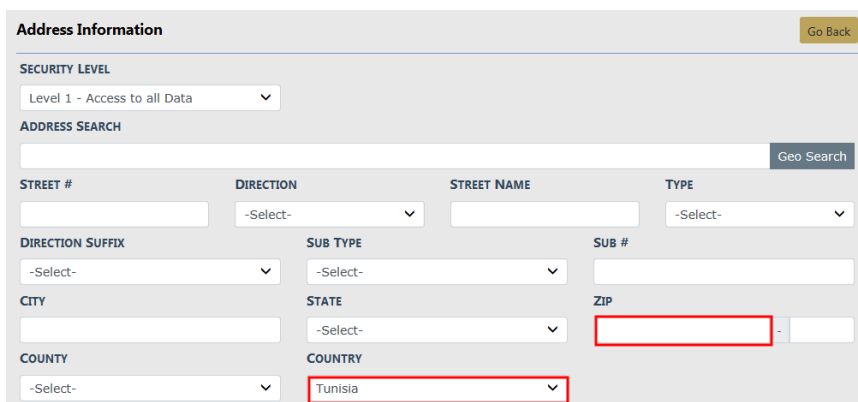
For events occurring at locations that are not at a specific address, you can drag the map marker location on the map to use Geo-Coordinates for that location. Choose a result from the location matches found, then drag the Map Marker to the exact location on the map to update the Geo-Coordinates for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

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



### Other Countries

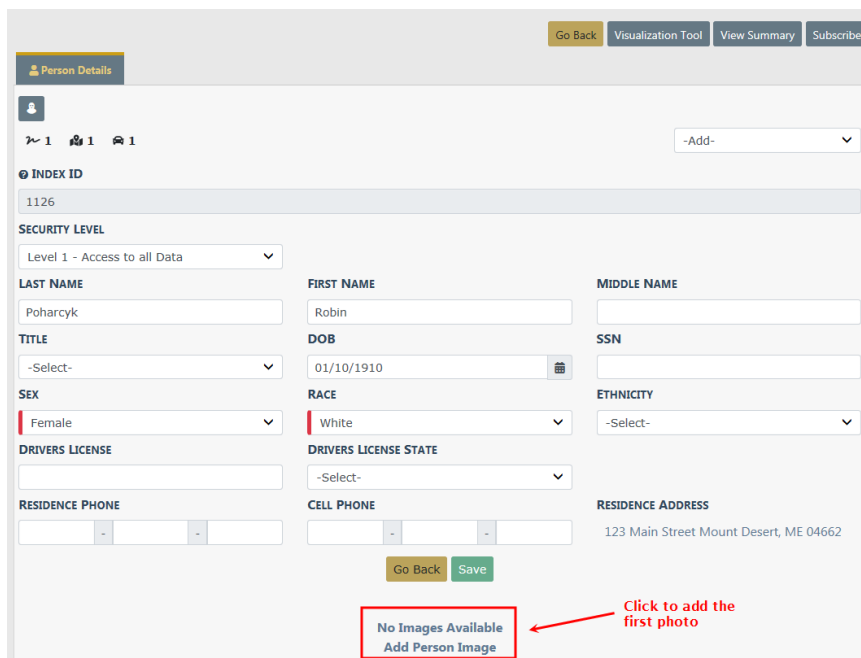
When choosing a **County Code** other than the *United States*, the system does not validate or enforce **Zip Code** entry rules.



# Adding Photos

## Adding the First Photo

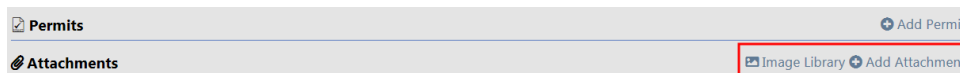
1. Select the **Add Person Image** link on a *Master Person Index* record that does not yet have a photo.



2. Follow the "Add Attachments" on page 59 instructions to add the new photo.

## Adding Additional Photos

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



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

2. Refer to "Add Attachments" on page 59 or "Image Library" on page 65 for more information.

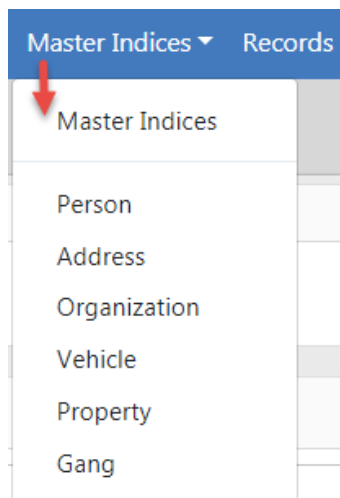
## Duplicate Records

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

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

For descriptive information on *Master Indices*, refer to "Master Indices Overview" on page 71.

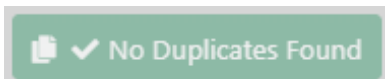
For instructions on entering a new person or address record, refer to "Adding Person" on page 85 or "Adding Address" on page 94, respectively.



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

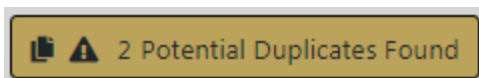
## No Duplicates Found

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



## Possible Duplicates Found

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



Caliber  
Administration ▾ Incidents ▾ Master Indices ▾ Records Management ▾ Forms And Reports ▾ Help ▾

Person Search / Person Search Results / Add Person

**Person Information** Displays for users with Index Security Level greater than 1 ⚠ 2 Potential Duplicates Found Go Back

SECURITY LEVEL Checks for duplicates automatically

Level 1 - Access to al ▾

LAST NAME FIRST NAME MIDDLE NAME TITLE DOB SSN

LeClaire Christine

Sex RACE ETHNICITY DRIVER'S LICENSE NUMBER DRIVER'S LICENSE STATE

Female White

RESIDENCE PHONE CELL PHONE

**Physical Description**

HEIGHT WEIGHT EYE COLOR HAIR COLOR FACIAL HAIR

Feet Inches Pounds

HAIR LENGTH BUILD SKIN COLOR HAIR STYLE GLASSES DATE OF INFO

**Person Photo / Mugshot**

SELECT PICTURE  Select From Library

Choose File No file chosen

PHOTO TYPE

Drivers License

**Residence Address** Geo Search

ONE LINE ENTRY



You can type an address here and press the Geo Search button to search the address for you

STREET # DIRECTION STREET NAME STREET TYPE DIRECTION SUFFIX SUB TYPE

Click on **Potential Duplicates Found** to view the existing records.

## Person Duplicates

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

Potential Person Duplicates										
Index Id	Last Name	First Name	Middle Name	DOB	Race	Sex	SSN	Name Type	Other	Actions
 396	JONES	WILLIAM		03/03/1965	Hispanic	Male		Alias	Residence Address: 126 North 750 West IN DL #: OLN123456 / AK	 Edit
<a href="#">View details</a>										

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

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

### View Details

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

Index Id: 1077			
Last Name: Poharcyk	First Name: Robin	Middle Name: --	DOB: --
Sex: Female	Race: White	Ethnicity:	
DL #:	State:	SSN:	
Residence Phone:	Cell Phone:		
Email:			
<b>Address:</b>			
Height:	Weight:	Eye Color:	
Hair Color:	Complexion:		
Place of Birth:		Citizenship:	

### Edit Record

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

Person Details

Go Back Visualization Tool Create Photo Lineup View Summary Manage Subscription

(2/4)  
09/12/2012

INDEX ID  
396

SECURITY LEVEL  
Level 1 - Access to all Data

LAST NAME: JONES  
FIRST NAME: WILLIAMS  
MIDDLE NAME:   
TITLE: -Select-  
DOB: 03/03/1965  
SSN:   
SEX: Male  
RACE: White  
ETHNICITY: Not Hispanic or Latino  
DRIVERS LICENSE: OLN123456  
DRIVERS LICENSE STATE: Alaska  
RESIDENCE ADDRESS: 126 North 750 West IN  
CELL PHONE:   
Go Back Save

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

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

Potential Person Duplicates

Index Id	Last Name	First Name	Middle Name	DOB	Race	Sex	SSN	Name Type	Other	Actions
396	JONES	WILLIAM		03/03/1965	White	Male		Alias	Residence Address: 126 North 750 West IN DL #: OLN123456 / AK	

*\* If you don't want to select a duplicate, enter a reason and click the button below*

I Don't Want to Select a Duplicate

### Residence Address Duplicates

Enter the address information.

**Residence Address** ⚠️ 2 Potential Duplicates Found [Reset Address Fields](#)

✓ Geo Verified [Geo Verify Again](#)


**ONE LINE ENTRY**

You can type an address here and press the Geo Search button to search the address for you  [Geo Search](#)


<b>STREET #</b> 1300	<b>DIRECTION</b> -Select-	<b>STREET NAME</b> Broadway
<b>STREET TYPE</b> -Select-	<b>DIRECTION SUFFIX</b> -Select-	
<b>SUB TYPE</b> -Select-	<b>SUB #</b> 	
<b>CITY</b> Denver	<b>STATE</b> Colorado	<b>ZIP</b> 80203 - 2104
<b>COUNTRY</b> -Select-	<b>COUNTRY</b> United States of America	
<b>LATITUDE</b> 39.7377751	<b>LONGITUDE</b> -104.9869158	


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

Residence Address Potential Duplicates

Index Id	Address	Geo Verified	Actions
1655	1300 Broadway Denver, CO 80203	Yes	
<b>ADDRESS</b> 1300 Broadway Denver, CO 80203			
<b>INDEX ID</b>	<b>LATITUDE</b>	<b>LONGITUDE</b>	
1655	39.737775	-104.986915	

[Cancel](#)

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

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

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

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



**Residence Address** ⚠️ 2 Potential Duplicates Found [Reset Address Fields](#)

[Revert Selection](#)

**ADDRESS**  
1300 Broadway Denver, CO 80203

INDEX ID	LATITUDE	LONGITUDE
1655	39.737775	-104.986915

**Residence Address** ⚠️ 2 Potential Duplicates Found [Reset Address Fields](#)

✓ Geo Verified [Geo Verify Again](#)

**ONE LINE ENTRY**  
You can type an address here and press the Geo Search button to search the address for you [Geo Search](#)

<b>STREET #</b> 1300	<b>DIRECTION</b> -Select-	<b>STREET NAME</b> Broadway
<b>STREET TYPE</b> -Select-	<b>DIRECTION SUFFIX</b> -Select-	
<b>SUB TYPE</b> -Select-	<b>SUB #</b> 	
<b>CITY</b> Denver	<b>STATE</b> Colorado	<b>ZIP</b> 80203 - 2104
<b>COUNTY</b> -Select-	<b>COUNTRY</b> United States of America	
<b>LATITUDE</b> 39.7377751	<b>LONGITUDE</b> -104.9869158	

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

**Geographical Information** [Geo Verify](#)

**REPORTING AREA**  
-Select-

**LATITUDE**  
39.737775  
39 44 15.990 N

**LONGITUDE**  
-104.986915  
104 59 12.894 W

[View Incidents In This Area](#)

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



Click the **Save** button.

### Vehicle Duplicates





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

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

The screenshot shows a 'Vehicle' form with the following fields: VIN (abc123), YEAR, MAKE, MODEL, LICENSE PLATE, LICENSE STATE (-Select-), LICENSE MONTH / YEAR, COLOR (-Select-), and ROLE (-Select-). There are 'Go Back' and 'Save' buttons at the bottom. A notification at the top right says '2 Potential Duplicates Found' and 'Reset Vehicle Fields'.

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

Potential Vehicle Duplicates

Index Id	VIN	Year	Make	Model	License	State	Actions
 355	ABC123	2017	HONDA/AMERICAN HONDA MOTOR CO, INC(HOND)	ACCORD		AL	
 745	abc123	2019	AUDI(AUDI)	A8	ANG123	PA	

Cancel

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

The screenshot shows the 'Vehicle' form with a table of vehicle details and a 'Role' dropdown menu. The table has columns: YEAR (2019), VIN (abc123), MAKE (AUDI(AUDI)), MODEL (A8), TYPE (Automobile), and STYLE (Sedan, no. of doors unkno). The second row has columns: LICENSE PLATE (ANG123), LICENSE STATE (PA), LICENSE MONTH / YEAR (- / 2019), COLOR (DBL), DATE OF INFO (02/01/2019 12:00:00 AM), and INDEX ID (745). The 'Role' dropdown is set to 'Passenger'. There are 'Go Back' and 'Save' buttons at the bottom. A notification at the top right says '2 Potential Duplicates Found' and 'Reset Vehicle Fields'. A 'Revert Selection' button is in the top left.

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

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

**Vehicle** ⚠ 2 Potential Duplicates Found [Reset Vehicle Fields](#)

VIN	YEAR	MAKE	MODEL
abc123			
LICENSE PLATE	LICENSE STATE	LICENSE MONTH / YEAR	COLOR
	-Select-		-Select-
ROLE			
-Select-			

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

Click **Save**.

## Deleting Master Index Records

You cannot delete **Master Index** records, only edit and collapse them. For more information on collapsing records, refer to your system administrator.

## Print Master Person Records

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

### To print a master person record:

Search for and select the appropriate master person record.

For details on accessing the Master Indices, refer to "Accessing Master Indices" on page 74.

For details on searching for Master Index records, refer to "Searching Master Records" on page 75.

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

Last Name	First Name	Middle Name	Title	Sex	Race	DOB	SSN	Misc ID	Name Type	Index ID	Actions
JONES	WILLIAM			M	W	03/03/1965		oIn123456	Alias	396	[Edit]
JONES	WILLIAMS			M	W	03/03/1965		oIn123456	Primary Name	396	[Edit]
JONES	WILLIAMTWO			M	W	03/03/1965		oIn123456	Alias	396	[Edit]

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

Person Details

Go Back Visualization Tool Create Photo Lineup **View Summary** Manage Subscription

[Profile Picture]

INDEX ID: 396 SECURITY LEVEL: Level 1 - Access to all Data

LAST NAME: JONES FIRST NAME: WILLIAMS MIDDLE NAME: [Empty]

From the *View Person Details* page, click on the **Print Report** button to open the *Person Details Print Options*.

Person Details Person Summary

Go Back **Print Report** Visualization Tool Create Photo Lineup Update Details Manage Subscription

[Profile Picture]

INDEX ID: 396

LAST NAME: JONES FIRST NAME: WILLIAMS MIDDLE NAME: [Empty]

**Total Involvements**

Incidents	09/24/2018	22
FieldArrest	08/03/2017	20

**Person Details Print Options**

Please select what information you would like to include in the Person Details Report.

<b>Detail Information:</b> <input checked="" type="checkbox"/>	<b>Summary Information:</b> <input checked="" type="checkbox"/>	<b>Select All:</b> <input checked="" type="checkbox"/>
<b>Warrants:</b> <input checked="" type="checkbox"/>	<b>Incidents:</b> <input checked="" type="checkbox"/>	
<b>Field Contacts:</b> <input checked="" type="checkbox"/>	<b>Citations:</b> <input checked="" type="checkbox"/>	
<b>Permits:</b> <input checked="" type="checkbox"/>	<b>Field Arrests:</b> <input checked="" type="checkbox"/>	
<b>Attachments(PDFs):</b> <input checked="" type="checkbox"/>	<b>Court Papers:</b> <input checked="" type="checkbox"/>	
<b>Redact Social Security #s:</b> <input checked="" type="checkbox"/>		
<b>Display Common Event Associations:</b>		
<b>Persons:</b> <input checked="" type="checkbox"/>	<b>Addresses:</b> <input checked="" type="checkbox"/>	
<b>Vehicles:</b> <input checked="" type="checkbox"/>	<b>Gangs:</b> <input checked="" type="checkbox"/>	
<b>Properties:</b> <input checked="" type="checkbox"/>		

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


Click the **Print** button.

A **PersonDetailsReport.PDF** file generates and downloads to your local machine.


Open and print the PDF file. This document could contain several pages, depending on the number of chosen options.

PersonDetailsReport.pdf 1 / 9

FOR OFFICIAL USE ONLY (FOUO) JONES, WILLIAMS 03/03/1965



**Indiana State Police**  
Person Details Report  
100 Senate Avenue Indianapolis, IN 46204  
Phone: (317) 899 - 8293 Fax: (317) 233 - 3057

Index Id 396	Date of Info 02/15/2019					 09/12/2012
Person Name JONES, WILLIAMS	Title	DOB 03/03/1965	Age 55	SSN		
Sex Male	Race White	Ethnicity Not Hispanic or Latino				
DL # OLN123456	DL State PA					

**Cautions**

Code	Comments	Start Date	Expire Date	Next Review Date	Date of Info
Assaultive/Combative		08/03/2017			08/03/2017

**Aliases**

Name	Title	DOB	SSN	Type	Date of Info
Willy				A	07/19/2017
Jones, Williamtwo		03/03/1965		A	06/19/2012
Jones, William		03/03/1965		A	06/19/2012

# Subscribe to Master Records

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

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

Follow these steps to Subscribe:

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

For more information on searching, refer to "Searching Master Records" on page 75.

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

Last Name	First Name	Middle Name	Title	Sex	Race	DOB	SSN	Misc ID	Name Type	Index ID	Actions
WILLIAM JONES				M	H	03/03/1965		oln123456	Alias	396	View Edit
WILLIAMS JONES				M	H	03/03/1965		oln123456	Primary Name	396	View Edit
WILLIAMTWO JONES				M	H	03/03/1965		oln123456	Alias	396	View Edit

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

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

**Subscribe** = Add a new subscription.

**Manage Subscription** = Update or delete the existing subscription.

5. Click the button that applies in this case.

6. The **Subscription** form opens.

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

The screenshot shows the 'Add Subscription' form. The breadcrumb trail is 'Person Search / Person Search Results / Edit Person (JONES,WILLIAMS) / Add Subscription'. The form contains the following fields and options:

- SUBSCRIPTION TYPE:** PERSON
- INDEX NAME:** JONES WILLIAMS
- ACTION TYPE(S):**  View  Update  Association
- REASON:** An empty text area.
- NOTIFICATION METHODS:**  Notification Inbox  Notification E-Mail
- SILENT SUBSCRIPTION:**

Buttons at the bottom: Go Back, Save.

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

The screenshot shows the 'Edit Subscription' form. The breadcrumb trail is 'Person Search / Person Search Results / Edit Person (JONES,WILLIAMS) / Edit Subscription'. The form contains the following fields and options:

- SUBSCRIPTION TYPE:** PERSON
- INDEX NAME:** JONES WILLIAMS
- ACTION TYPE(S):**  View  Update  Association
- REASON:** Test Subscription
- NOTIFICATION METHODS:**  Notification Inbox  Notification E-Mail
- SILENT SUBSCRIPTION:**

Buttons at the bottom: Go Back, Delete, Save.

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

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

8. Click **Save**.

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





# Chapter 8. Photo Lineup

## Photo Lineup Overview

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

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

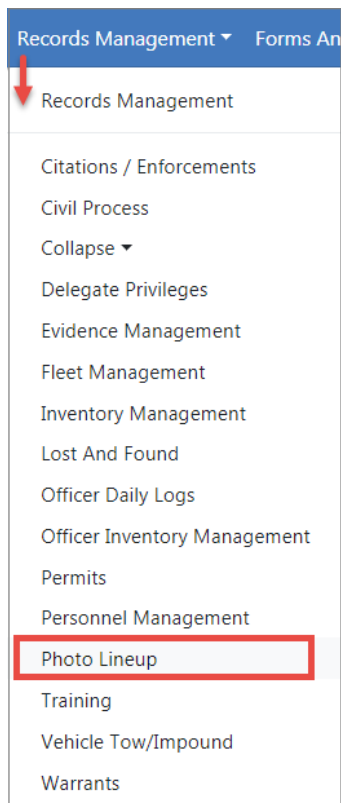
## Access Points

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

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

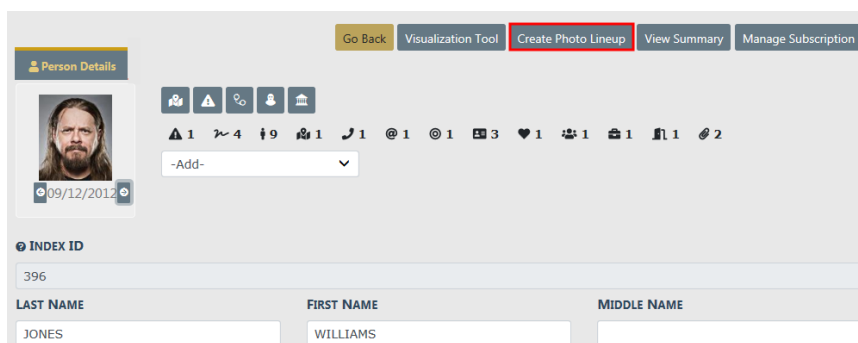
## Records Management Menu

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



## View and Edit Person Pages

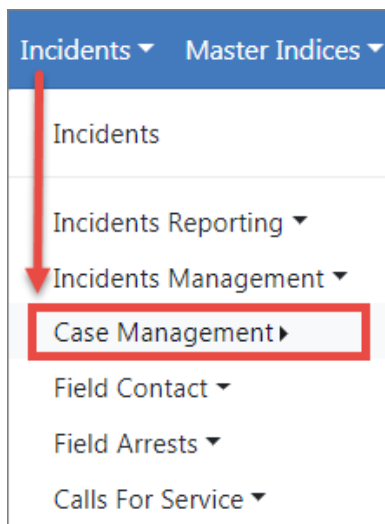
Search and select a person from the *Master Name Index* that has a person photo. For detailed instructions on how to search and access *Master Person* records refer to "Searching Master Records" on page 75.



If an image does not exist for that person, select *Add Person Image*. For more information refer to "Adding Photos" on page 99.

## Follow-up Case Management module.

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



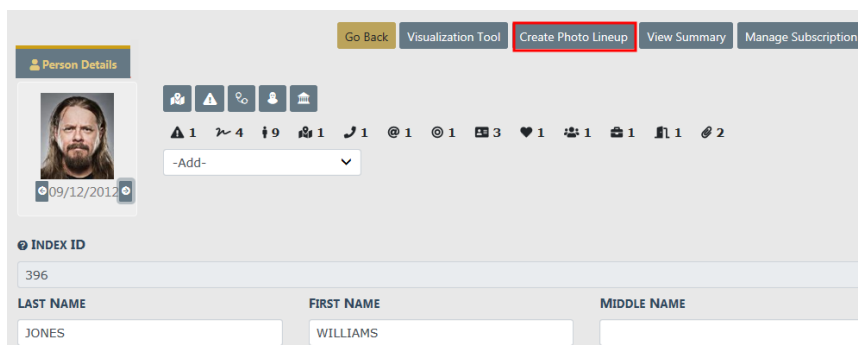
Open a Case, page down to the **Involved Names** section, then click on the Hand icon.

**NOTE:** For more information on accessing the **Case Management** module refer to "Case Management" on page 381.

## Create Photo Lineup

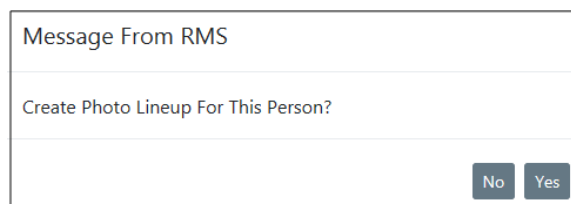
Create a **Photo Lineup** from a *Master Person Index* record that already has an existing photo. If the person does not yet have a photo, one must be added. For instructions on adding an initial photo refer to "Adding Photos" on page 99.

1. Search and select a person from the *Master Name Index*. For instructions on searching for a person refer to "Searching Master Records" on page 75.
2. Select the **Create Photo Lineup** button.



The screenshot shows a user interface for a person's details. At the top, there are navigation buttons: "Go Back", "Visualization Tool", "Create Photo Lineup" (highlighted with a red box), "View Summary", and "Manage Subscription". Below this is a "Person Details" section with a profile picture, a date "09/12/2012", and a list of social media-style icons. Underneath is an "INDEX ID" field containing "396". At the bottom, there are three input fields labeled "LAST NAME", "FIRST NAME", and "MIDDLE NAME" with the values "JONES", "WILLIAMS", and an empty field respectively.

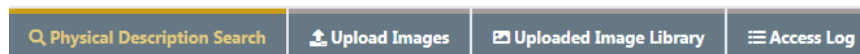
3. Select **Yes** to confirm the creation of the **Photo Lineup**.



The screenshot shows a confirmation dialog box. The title is "Message From RMS". The main text asks "Create Photo Lineup For This Person?". At the bottom right, there are two buttons: "No" and "Yes".

4. The **Photo Lineup** page appears.

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



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

**Lineup**

**NAME**

**PHOTO COUNT**

6

**CREATED BY**

Saur, Christine

**DATE CREATED**

03/12/2019 1100

**COMPLETED**

**Not Complete**

Go Back Save Complete

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

Or you can manually enter the search parameters without selecting from the drop-down list.

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

Physical Description Search | Upload Images | Uploaded Image Library | Access Log

SEARCH ON SUSPECT PHYSICAL DESCRIPTION

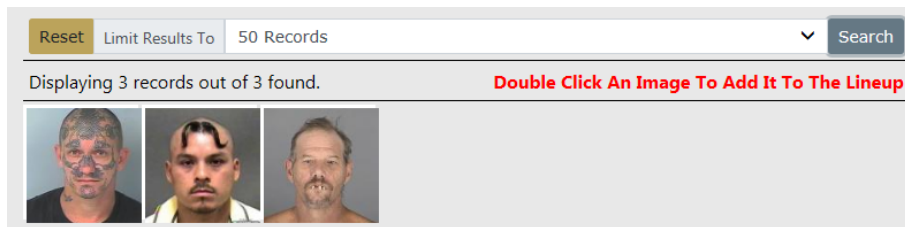
Height: 5'07" Click in this field to display a list of items from which to choose

HEIGHT FROM: 5' 05"	HEIGHT TO: 5' 09"	WEIGHT: [ ] To [ ]
SEX: Male	RACE: Hispanic	ETHNICITY: Not Hispanic or Latino
EYE COLOR: Blue	SKIN COLOR: -Select-	BUILD: -Select-
HAIR COLOR: -Select-	HAIR STYLE: -Select-	HAIR LENGTH: -Select-

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

Limit Results To 50 Records

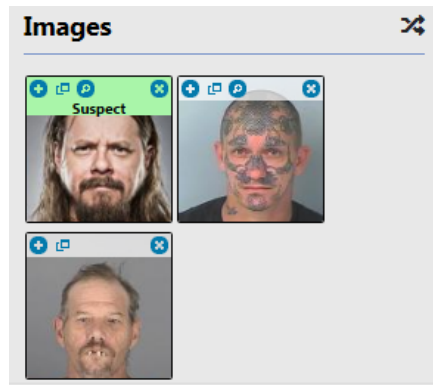
8. Select the **Search** button to find person photos in Online RMS that match your search criteria. The matching person photos appear on the bottom of the window.



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

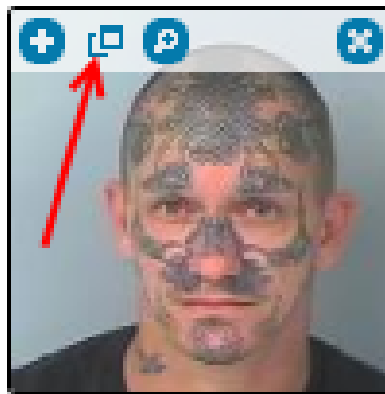
### Select Displayed Images

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



### Upload Image File

- a. Select the **Upload Images** tab, and select the **Add Files** button or **Drag Files** to add photos from your local computer or network drive. For more information on uploading files, refer to "Add Attachments" on page 59.
  - b. Imported image files are added to **Images** automatically and saved in the **Uploaded Image Library** tab for future use.
10. Get additional photo information.
    - a. Click on the **Quick View** folder icon to open a **Person Quick View** tab containing details of that person.



Q Physical Description Search   Upload Images   Uploaded Image Library   Access Log   **Person Quick View**

Person Details   Person Summary

**Person Details**

INDEX ID  
351

LAST NAME Grill	FIRST NAME Edward	MIDDLE NAME R
TITLE	DOB 09/15/1986	SSN 635465163
SEX Male	RACE White	ETHNICITY Unknown
DL # G163516513251	DL STATE Illinois	
RESIDENCE PHONE 815-255-6262	CELL PHONE 309-848-4861	
RESIDENCE ADDRESS 123 West Olive Street Apartment #125 BLOOMINGTON, IL 61701		

**Caution Codes**

Code	Comments	Start Date	Expiration Date	Next Review Date	Date Of Info
Sex Offender - Regist.	<b>i</b>	03/12/2014	05/05/2015	03/14/2014	03/12/2014
Known drug user		11/05/2014	11/15/2014	11/25/2014	11/05/2014

**Images**

Image 1 of 2

◀ 09/06/2012 ▶

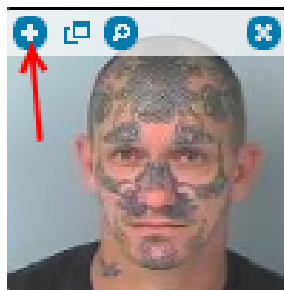
**Total Involvements**

Incidents	06/28/2017
Served Warrants	05/17/2015
Field Contacts	09/28/2012
Field Arrest	08/13/2015
Permits	
Court Papers	07/14/2014
Custom Forms	02/17/2014

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

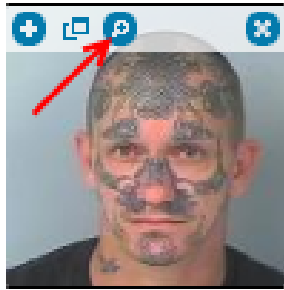


- b. Click on the + icon to view a larger image of the lineup photo.



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





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

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

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

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

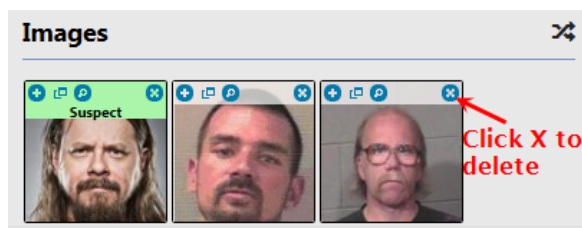
**NOTE:** The number of lineup images must match the **Photo Count** as specified by the Agency before the lineup can be completed.

13. Click the **Print** icon to the right of the **Complete** button to print the **Lineup**. For detailed instructions on how to print a photo lineup refer to "Print Photo Lineup" on page 124.
14. Click **Access Log** tab to view a log who accessed the lineup. For more information refer to "Access Log" on page 128.

## Remove a Photo

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

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



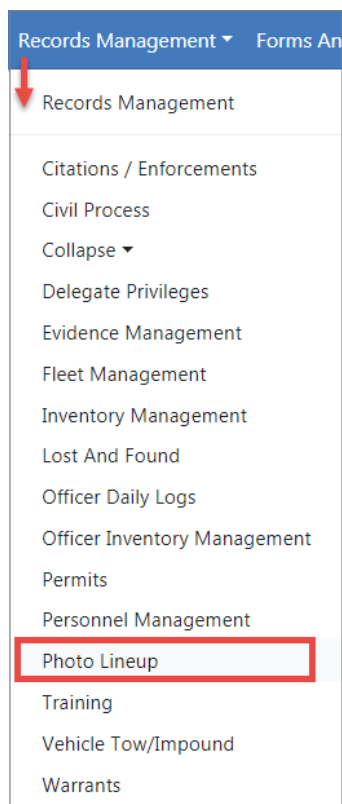
**NOTE:** Clicking the **X** removes the image immediately, without a confirmation window.

2. Click the **Save** button.

## Search Lineups

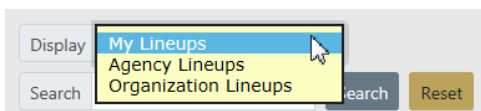
Search Lineups to *view, print, edit* or *delete* a lineup.

1. Select **Photo Lineup** from the **Records Management Menu**.



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

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



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

Display: Agency Lineups Go Back Add Lineup View Delete Log

Search:  Reset Search Show 10 entries

Lineup Name	Primary Suspect	Creator	Created Date	Complete	Actions
	JONES, WILLIAMS	Saur, Christine	11/19/2019 1318	No	
	JONES, WILLIAMS	Saur, Christine	11/19/2019 1311	No	
Case #0000009CASE2013	Jackson-Smith, Henrietta	Simpson, Homer	06/10/2019 1738	No	
TEST	Evans, Christoph	Simpson, Homer	03/25/2019 1501	No	
	JONES, WILLIAMS	Saur, Christine	03/12/2019 1200	No	

Display: My Lineups Go Back Add Lineup View Delete Log

Search:  Reset Search Show 10 entries

Lineup Name	Primary Suspect	Creator	Created Date	Complete	Actions
	JONES, WILLIAMS	Saur, Christine	01/24/2019 1030	No	
	JONES, WILLIAMS	Saur, Christine	01/22/2019 1749	No	
20170731WJ	N/A	Saur, Christine	08/02/2017 1603	No	

Showing 11 to 12 of 12 entries

Previous 1 2 Next

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

Display: Agency Lineups Go Back Add Lineup View Delete Log

Search: 10.29 Reset Search Show 10 entries

Lineup Name	Primary Suspect	Creator	Created Date	Complete	Actions
10.29 test	PAWLEY, STEVEN	Simpson, Homer	12/01/2017 1136	No	
10.29 test	PAWLEY, STEVEN	Simpson, Homer	12/01/2017 1136	No	
10.29 test	PAWLEY, STEVEN	Simpson, Homer	12/01/2017 1136	No	


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

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

For more information on viewing, editing, or deleting **Lineups** refer to "View, Edit, Delete Lineups" on page 125

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

## Print Photo Lineup

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

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

Print Options

---

**ONE IMAGE PER PAGE?**









































**INCLUDE SIGNATURE LINE?**

**INCLUDE IMAGE KEY?**

2. Check all options that apply then click **Run Report**.
3. A file generates and downloads to your local machine automatically.


Display: My Lineups Go Back Add Lineup View Delete Log

Search:  Reset Search Show 10 entries

Lineup Name	Primary Suspect	Creator	Created Date	Complete	Actions
	JONES, WILLIAMS	Saur, Christine	11/19/2019 1318	No	   
	JONES, WILLIAMS	Saur, Christine	11/19/2019 1311	No	   
	JONES, WILLIAMS	Saur, Christine	03/12/2019 1200	No	   
	JONES, WILLIAMS	Saur, Christine	03/12/2019 1158	No	   
GrillE	Grill, Edward	Saur, Christine	02/22/2019 1426	Yes	   
GrillE	Grill, Edward	Saur, Christine	02/22/2019 1423	No	   
	Grill, Edward	Saur, Christine	02/22/2019 1421	No	   
JonesW	JONES, WILLIAMS	Saur, Christine	02/22/2019 1410	No	   
20190124WJ	JONES, WILLIAMS	Saur, Christine	01/24/2019 1453	No	   
	JONES, WILLIAMS	Saur, Christine	01/24/2019 1030	No	   

Showing 1 to 10 of 12 entries Previous 1 2 Next

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 The contributing agency retains sole ownership of and sole responsibility for the information it contributes to the Online RMS including but not limited to, the accuracy of the information. Receiving agencies will take no enforcement action without first verifying the current status of

 PhotoLineup-57 (1).pdf Show all X

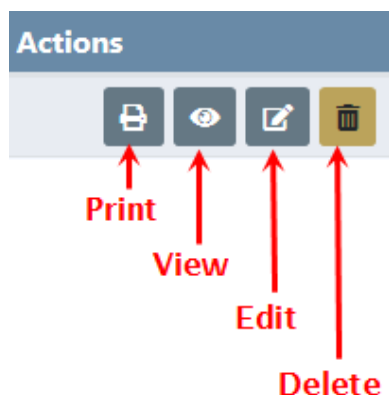
Click on the file to open the report, then print if applicable.

## View, Edit, Delete Lineups

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

1. **Search** for the **Photo Lineup** you want to *view*, *edit*, or *delete*. For details on searching refer to "Search Lineups" on page 122.

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

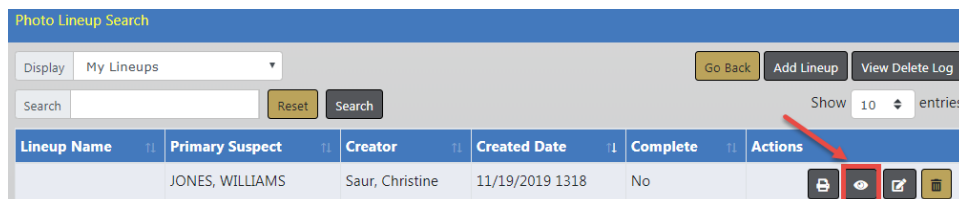


When an icon does not display, then that action is not available to you. For example, if you do not see the *Edit* icon, then you cannot edit that particular **Lineup**.

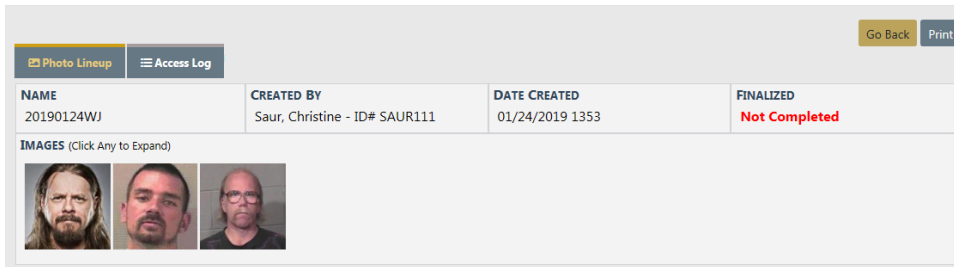
**NOTE:** Click the *Print* icon on the Lineup that appears in the search result grid, or print Lineups from other areas of the **Photo Lineup** module. For more information on printing refer to "Print Photo Lineup" on the previous page.

### View

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

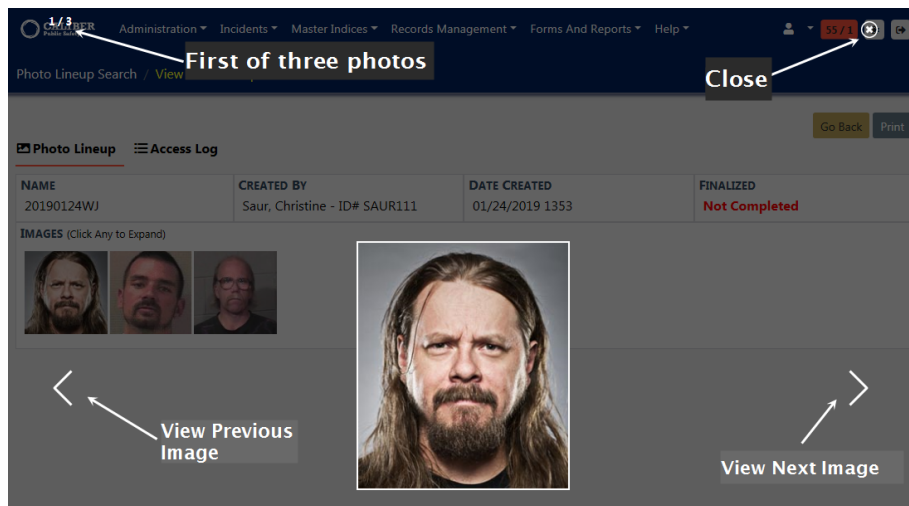


- The **Photo Lineup** contains photos, the date the **Lineup** was created, the person who created it, the current status, and an **Access Log** tab that tracks who *viewed* or *printed* the **Lineup**.



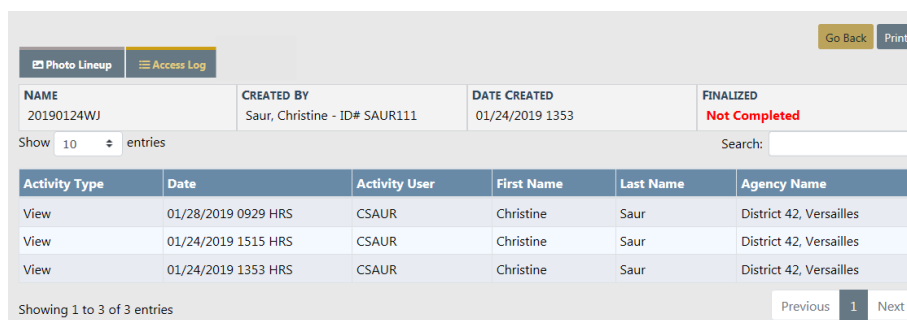
### Enlarge an Image

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



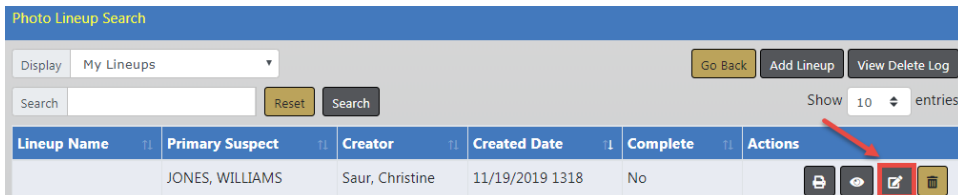
### View the Access Log

Click on the **Access Log** tab to view who accessed the **Lineup**. For more information refer to "Access Log" on page 128.



### Edit

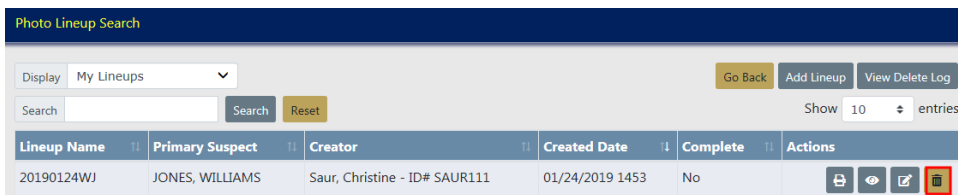
1. Click the *Edit* icon on the **Lineup** that appears in the search results grid.



2. Make the necessary changes to the **Lineup** page. *Editing* and *Creating Lineups* share the same functionality; therefore, refer to "Create Photo Lineup" on page 116 for more information.
3. Click the **Save** button when finished.
4. Click **Go Back** on the upper right of the window to return to the search results grid.

### Delete

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



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

Delete Photo Lineup

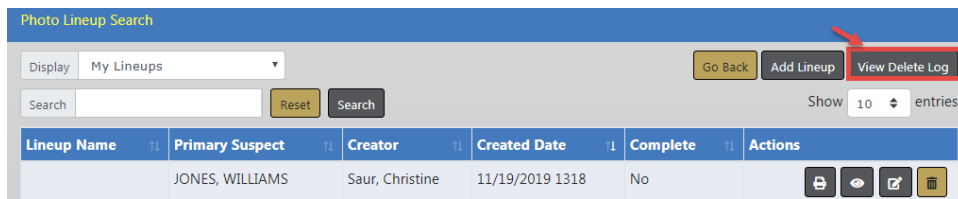
---

PLEASE ENTER REASON TO DELETE THIS PHOTO LINEUP

Created in error.

Cancel Delete

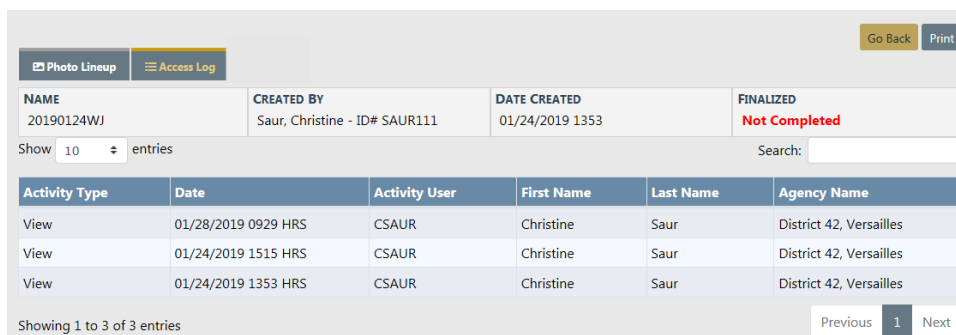
3. Deleted **Lineups** are logged with high-level information such as the agency, suspect, the person who deleted them and why. Click the **View Delete Log** button to view a list of deleted **Lineups**. For more information refer to "Delete Log" on page 129.



## Access Log

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

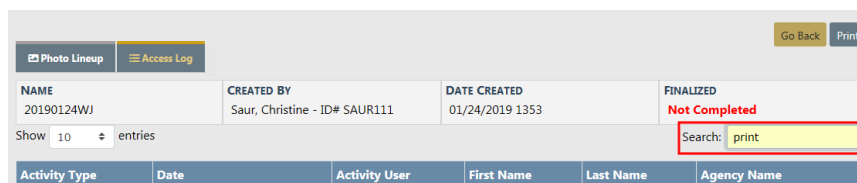
1. Click on the **Access Log** tab to view the **Lineup** activity.



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

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

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



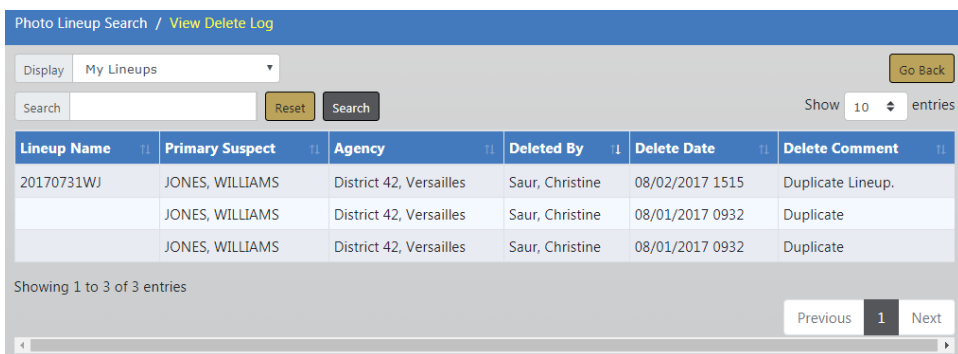
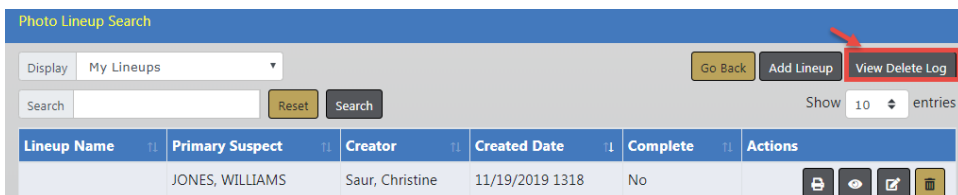
2. Click the **Go Back** button to return to the **Search** results grid.



## Delete Log

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

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



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



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



# Chapter 9. Crime Visualization Tool

## Crime Visualization Tool Overview

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

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

### Organizations

- People
- Addresses
- Phone Numbers
- Vehicles
- Incidents
- Field Contacts
- Organizations (Relationships)

### People

- Vehicles
- Gangs
- Addresses
- Incidents
- Field Contacts
- Phone Numbers
- Organizations (Employment, Education)

People (relationships)

**Vehicles**

People

Incidents

Field Contacts

**Gangs**

Field Contacts

People

Associated Gangs

**Addresses**

People

Organizations

Incidents

Field Contacts

**Phone Numbers**

People

Organizations

**Field Contacts**

People

Incidents

Gangs

Vehicles

Addresses

**Incidents**

People

Organizations (Victims, Other Names)

Vehicles

Addresses

Field Contacts

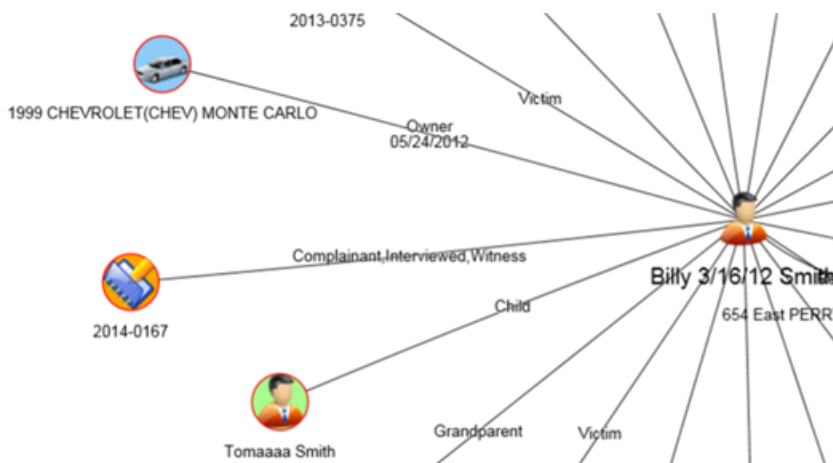
## Spider Chart

The **Crime Visualization Tool** that generates the **Spider Chart** is accessible from various pages of Online RMS such as Incident Summary, Persons, etc., by clicking on the **Visualization Tool** button or other method, depending on the Online RMS page. For more information on accessing the **Crime Visualization Tool** refer to "Access Points" on page 140.

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



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



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

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

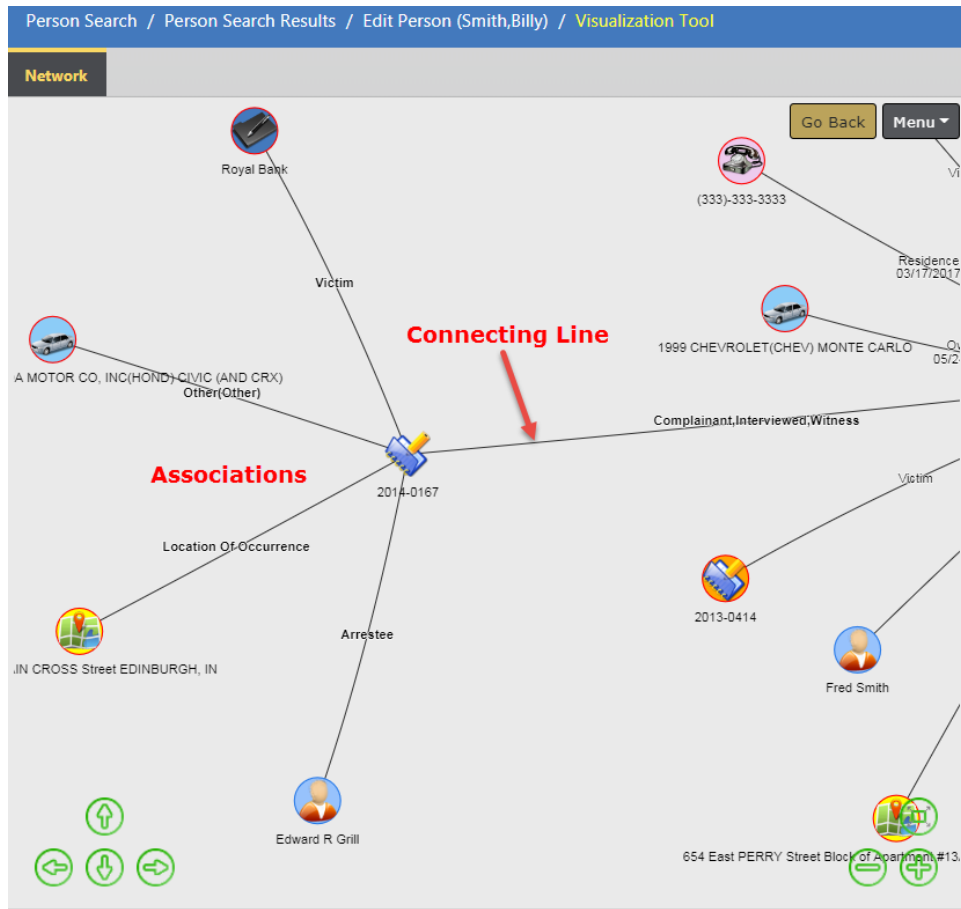
### Open in Viewer

Person Search / Person Search Results / Edit Person (Smith,Billy) / Visualization Tool

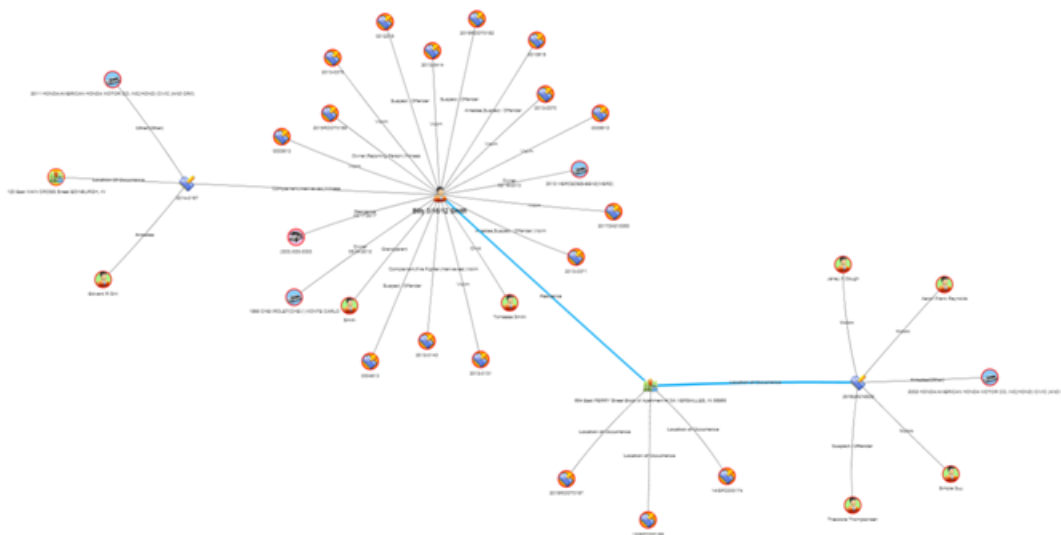
Network 2014-0167

Incident						
REPORT #	LOCATION	AGENCY				
2014-0167	123 East MAIN CROSS Street EDINBURGH, IN	District 16, Peru - GA				
REPORTING AREA	TYPES	NIBRS CITY				
-	Burglary / Building	FRANKLIN				
AGENCY OF OCCURRENCE	COUNTY	REPORT DATE				
District 16, Peru - GA	Fulton County	04/14/2014 1018				
OCCURRENCE DATE	TOWNSHIP	LOCATION REMARKS				
04/14/2014 1018						
DISPATCH DATE	ON SCENE DATE	CLEAR DATE				
SUMMARY						
Media Report						
Supplements						
Status	Responsible User	Security Level	Date Created	Date Approved	Approving User	Supp #
Approved Report	Rachel (off) Hospelhorn		04/14/2014 1018	04/14/2014	Julio (osuper) Arnez	0
Approved Report	Brenda (cid super) Allens	Patrol Officer	04/14/2014 1348	04/14/2014	Brenda (cid super) Allens	1
Initial Report	Rachel (off) Hospelhorn	Patrol Officer	04/14/2014 2311			2

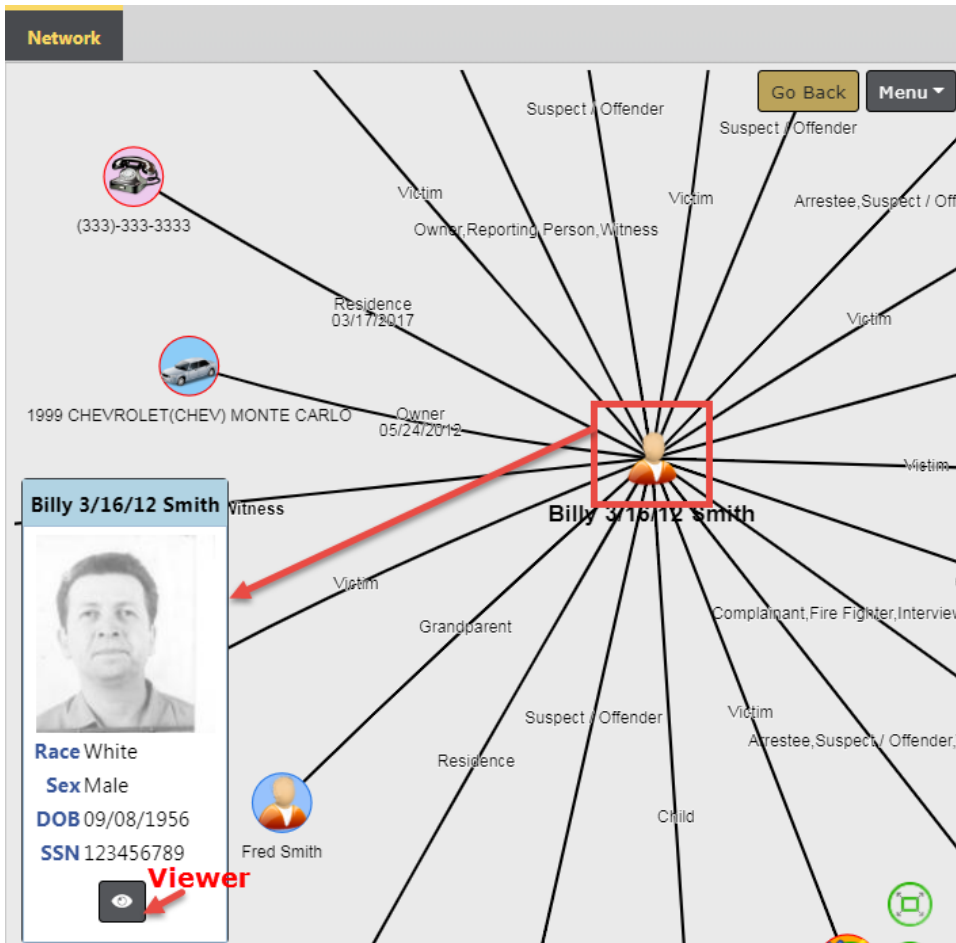
### Load Associated Data



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



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





Person Search / Person Search Results / Edit Person (Smith,Billy) / Visualization Tool

Network **Billy 3/16/12 Smith** X

**Person Details** Person Summary

**Person Details**

INDEX ID	42	
LAST NAME	FIRST NAME	MIDDLE NAME
Smith	Billy	3/16/12
TITLE	DOB	SSN
	09/08/1956	123456789
SEX	RACE	ETHNICITY
Male	White	Hispanic or Latino
DL #	DL STATE	
DL123487566	Virginia	
RESIDENCE PHONE	CELL PHONE	
333-333-3333	--	
RESIDENCE ADDRESS	654 East PERRY Street Block of Apartment #13A VERSAILLES, IN 58965	

**Aliases**

Last Name	First name	Middle	Title	DOB	SSN	Type	Date Of Info
SmithNWesson						Nickname	03/01/2017

**Images**

Image 1 of 1

11/21/2016

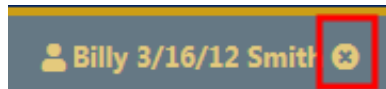
**Total Involvements**

Incidents	02/27/2017
Served Warrants	04/05/2012
Field Arrest	02/05/2019
Court Papers	12/08/2015

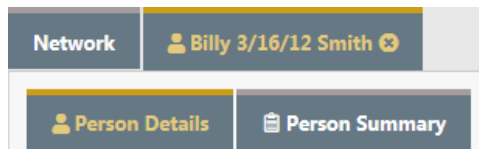
**Incident By Role**

Arrestee	2
----------	---

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



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



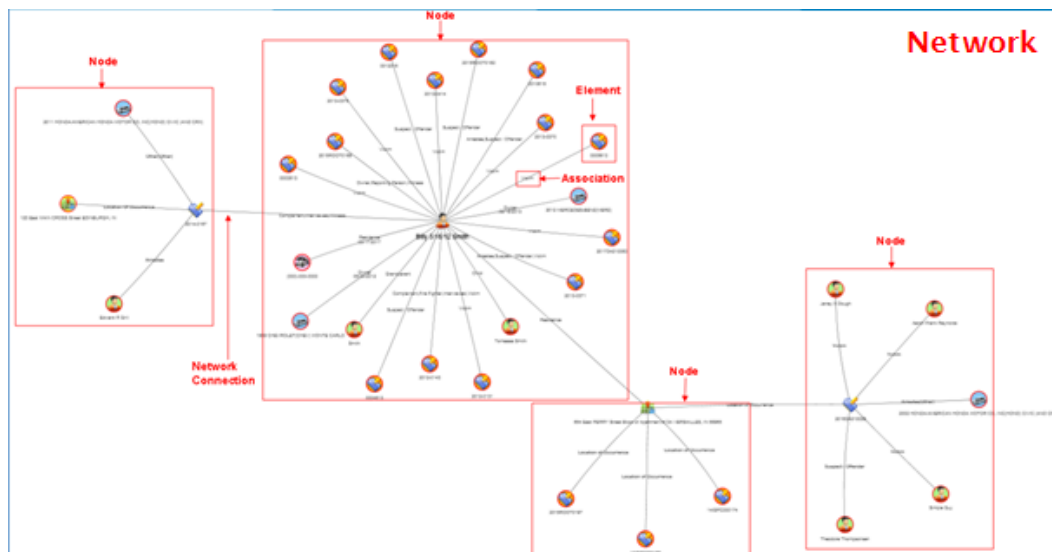
## Spider Chart Components

### Structure and Terminology

The Spider Chart consists of several components:

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

- Collection of elements and their association to one another.
- Element
  - The representation of specific people, places, things or events.
- Association
  - A line with description showing how elements are associated with one another.
- Network Connection
  - A line that represents the connection between Nodes within the Network.



### ***Manually Re-size the Chart***

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

#### **Mouse**

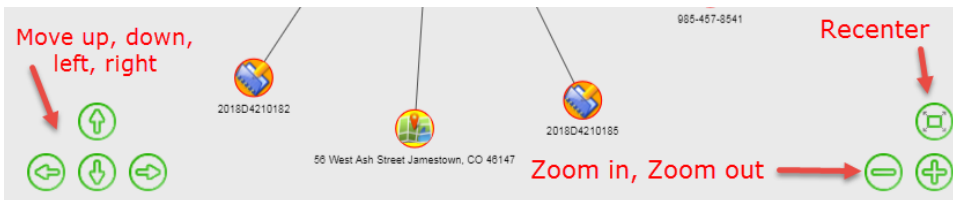
Click anywhere on the chart then move the mouse wheel away from you to enlarge the image on the screen, or move the mouse wheel toward you to decrease the size of the image.

### Keyboard

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

### Resizing Icons

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

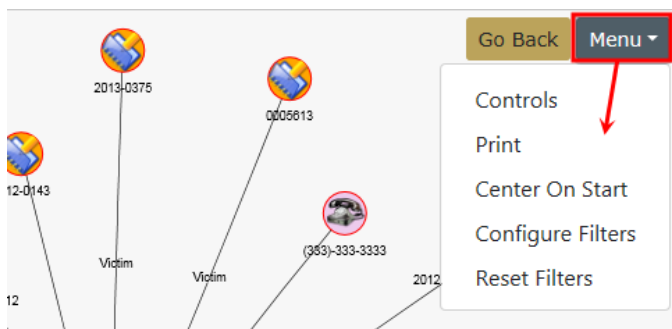


### Manually Reposition the Chart

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

### Re-Center and Filter the Chart

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



#### Center on Start

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

## Configure Filters

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

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

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

### Reset Filters

- Clears any Filters applied and redraws the chart.

## Access Points

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

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

- Incident Summary.

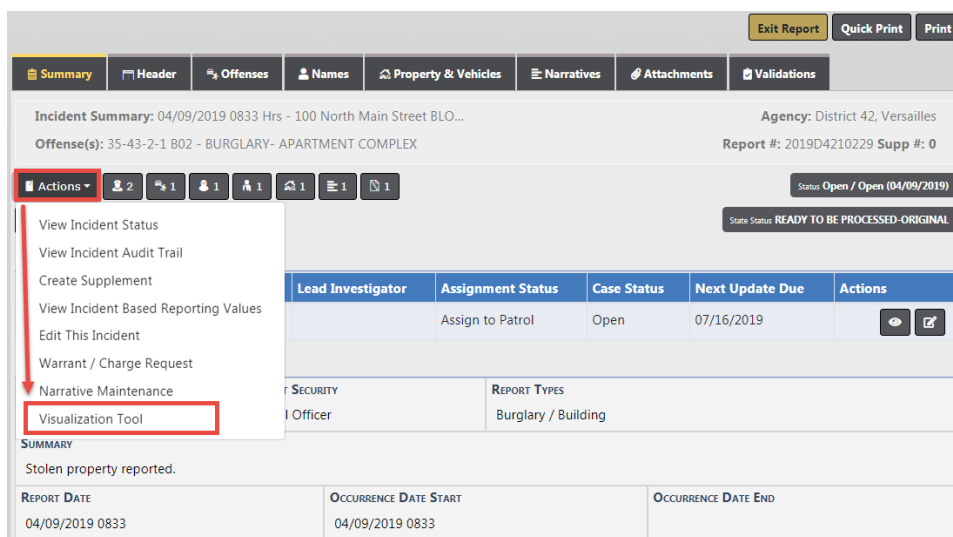
- Master Indices Details, in both *View* and *Edit* modes.
  - Organization, Person, Address, Vehicle, and Gang.
- Field Contacts, in both *View* and *Edit* modes.

## Incident Report

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

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

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



The **Spider Chart** will open with the **Incident Report** as the center **Element**. For more information on **Spider Chart** refer to "Spider Chart" on page 133.

## Field Contact

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

For more information on **Field Contacts**, refer to "Field Contacts" on page 335

## View Mode

Field Contact Search / Search Results / View Field Contact

Go Back Visualization Tool Print

**Field Contact Details**

CONTACT ID 287	AGENCY District 42, Versailles	SECURITY LEVEL Animal Control
CONTACT TYPE Alarm Response	CONTACT DATE 04/02/2019 1332	
SUMMARY		
NOTES		

## Edit Mode

Field Contact Search / Search Results / Edit Field Contact

Go Back Visualization Tool View Summary Print

**Field Contact Details**

CONTACT ID 277	AGENCY District 42, Versailles	SECURITY LEVEL Patrol Officer <span>Change Security</span>
CONTACT TYPE Knock and Talk	CONTACT DATE 06/07/2018 1113	
SUMMARY Neighbors complaining about noise.		

The **Visualization Tool** displays a **Spider Chart** with the center **Element** as the record you are on, along with lines leading to its associated records. For example, the center **Element** would be the record in the above example. For more information on **Spider Chart** refer to "Spider Chart" on page 133.

## Master Indices Detail Pages

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

For more information on **Master Indices**, refer to "Master Indices" on page 71.

The **Visualization Tool** displays a **Spider Chart** with the center **Element** as the record you are on, along with lines leading to its associated records. For example, if you open the tool from Billy Smith's Person record, the center **Element** is Billy Smith. For more information on **Spider Chart** refer to "Spider Chart" on page 133.

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

### Organization

Go Back Visualization Tool View Summary Subscribe

**Organization Details**

3 6 1 2 1

-Add-

INDEX ID: 240000007 SECURITY LEVEL: Level 1 - Access to all Data

NAME: Automation Industries ORGANIZATION TYPE: Law Office ORGANIZATION #: 123

COMMENTS:

### Person

Go Back Visualization Tool Create Photo Lineup View Summary Subscribe

**Person Details**

(1/1) 11/21/2016

INDEX ID: 42 SECURITY LEVEL: Level 1 - Access to all Data

LAST NAME: Smith FIRST NAME: Billy MIDDLE NAME: 3/16/12

### Address

Go Back Visualization Tool Update Details Subscribe

**Address Details** Address Summary

Audit Off SmartSearch (0)

INDEX ID	STREET #	DIRECTION	STREET NAME	TYPE
1693	1238	East	Carlson	Lane

Common Event Associations

### Vehicle

Go Back Visualization Tool View Summary Subscribe

**Vehicle Details**

SmartSearch (0)

-Add-

INDEX ID: 67 SECURITY LEVEL: Level 1 - Access to all Dat

YEAR: 2009 MAKE: AGRICULTURAL MA MODEL: FARM AND GARDEN EQL

## Gang

Go Back Visualization Tool View Summary Subscribe

**Gang Details**

1 1 -Add-

**INDEX ID** 21 **SECURITY LEVEL** Level 1 - Access to all Data

**GANG NAME** 4 Cheese Burritos23423423423 **GANG LEVEL** Local **GANG TYPE** Asian Gang



# Chapter 10. Calls for Service

## Calls For Service Overview

### Track and Document Calls

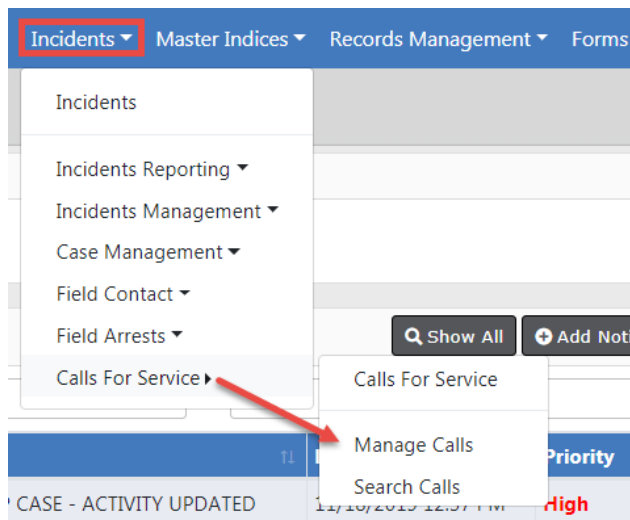
The **Calls For Service (CFS)** module allows a user to track calls and document how the call was received, caller's name, type of call, location of call, notes regarding the call, and disposition information. If units are dispatched the user can capture dispatch, on scene, and clear dates/times for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

#### Enhanced Integration from Caliber CAD

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

### Access Calls For Service

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

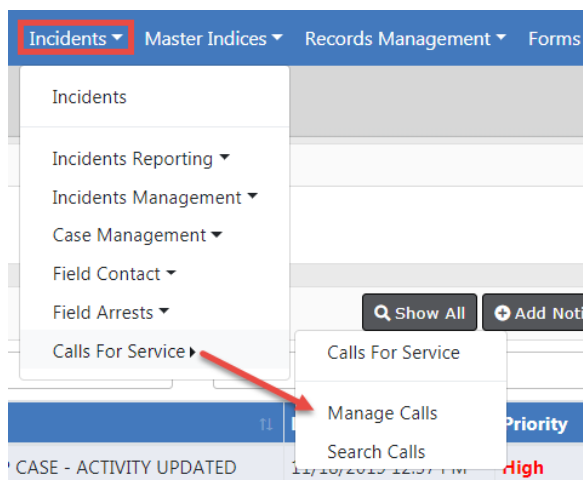


To create, edit, or view calls, refer to "Manage Calls for Service" below.

To search calls refer, to "Search Calls for Service" on page 157.

## Manage Calls for Service

You can create, edit, view calls by selecting the Calls For Service **Manage Calls** sub-menu.



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

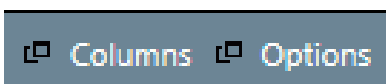
Manage Dispatch

New Call Toggle Officers Exit

Call List Call Map

	Dispatch #	Time	Name	Address	Call / Activity	Priority	Actions
1	+ 00000001378LAH19	03/25/2019 12:28					🔍 🗑️
2	+ 00000001368LAH19	02/11/2019 15:00	345#5	10198 Cavetown Road			🔍 🗑️
3	+ 00000001358LAH19	02/11/2019 14:53	James King			Low	🔍 🗑️
4	+ 00000001348LAH19	01/28/2019 15:33	Kara Poharcyk				📄
5	+ 2018-00000687	09/14/2018 08:52	Kelly Hall	E Main St, GREENFIELD, IN	TRAFFIC STOP	Low	🔍 🗑️

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



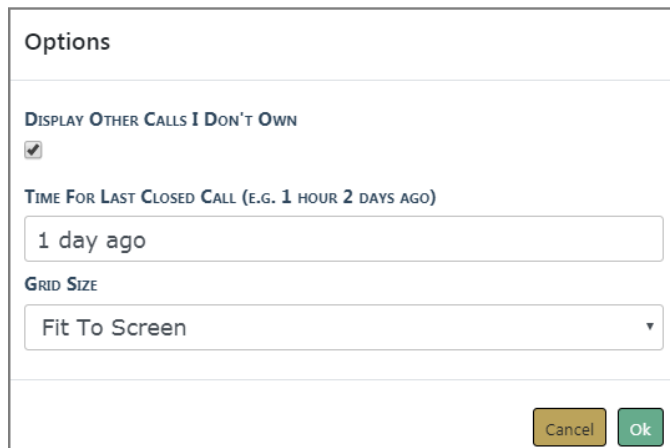
Select the **Columns** button to open a screen to which you can choose what columns you want to view. The left side of the box is the columns you have chosen, the right side of the box are additional columns that are available. Choose the + sign to add and the – sign to remove.

Select columns

7 items selected	Remove all		Add all
↕ Dispatch #	-	Phone #	+
↕ Time	-	Latitude	+
↕ Name	-	Longitude	+
↕ Address	-	Call Status	+
↕ Call / Activity	-	Dispatcher	+
↕ Priority	-	Agency	+
↕ Actions	-		

Ok Cancel

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



The screenshot shows a dialog box titled "Options". It contains three main sections: a checkbox labeled "DISPLAY OTHER CALLS I DON'T OWN" which is checked; a text input field labeled "TIME FOR LAST CLOSED CALL (E.G. 1 HOUR 2 DAYS AGO)" with the value "1 day ago"; and a dropdown menu labeled "GRID SIZE" with the selected option "Fit To Screen". At the bottom right of the dialog are two buttons: "Cancel" and "Ok".

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

## Initiate New Call

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

For more information on how to access the Manage Calls For Service menu option, refer to "Manage Calls for Service" on page 146.

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

The screenshot shows the 'Manage Dispatch' interface. At the top, there are three tabs: 'Call List', 'Call Map', and 'New Call'. The 'New Call' tab is highlighted in yellow, and a red arrow points to it with the text 'New tab opens'. To the right of the tabs are three buttons: 'New Call', 'Toggle Officers', and 'Exit'. The main form area contains several sections: 'DISPATCH AGENCY' (Indiana State Police), 'CALL DATE / TIME' (11/20/2019 0953), 'CALL RECEIVED' (-Select-), 'CALLER NAME' (empty), 'PHONE #' (empty), 'EVENT TYPE' (Police), 'CALL TYPE / ACTIVITY' (-Select-), and 'PRIORITY' (-Select-). Below these is the 'INCIDENT LOCATION' section with a text input field and a 'Geo Code' button. At the bottom, there are 'Cancel' and 'Save' buttons.

Enter the information known and select **Save**.

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

The screenshot shows the 'Manage Dispatch' interface with the 'Edit Call 0000000134BLAH19' tab highlighted in yellow. A red arrow points to it with the text 'New tab opens'. The 'Call Information' section is active, showing 'DISPATCH AGENCY' (Indiana State Police), 'CALL DATE / TIME' (01/28/2019 1533), 'CALL RECEIVED' (PHONE), 'CALLER NAME' (Kara Poharcyk), and 'PHONE NUMBER' (empty). At the top right, there are buttons for 'New Call', 'Toggle Officers', and 'Exit'.

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

## Edit a Call

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

The Officer/Dispatcher has the ability to add any additional Incident Notes. You can return to the call later to finish your edits by accessing the *Manage Call For Service* sub-menu option. For more information on accessing the *Manage Call For Service* sub-menu, refer to "Manage Calls for Service" on page 146.

On the *Edit Call* screen, seven sub-tabs and a notes section at the bottom of the screen appears:

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

The screenshot shows the 'Manage Dispatch' interface. At the top, there are buttons for 'New Call', 'Toggle Officers', and 'Exit'. Below this is a navigation bar with tabs: 'Call List', 'Call Map', and 'Edit Call 0000000138BLAH19'. The main content area has seven sub-tabs: 'Call Information', 'Officers', 'People', 'Vehicles', 'Incident Reports', 'History', and 'Attachments'. A red arrow points to these tabs with the text 'Seven sub-tabs'. The 'Call Information' tab is active, showing fields for 'DISPATCH AGENCY' (Indiana State Police), 'CALL DATE / TIME' (11/20/2019 0953), 'CALL RECEIVED' (-Select-), 'CALLER NAME', 'PHONE NUMBER', 'EVENT TYPE' (Police), 'CALL / ACTIVITY' (-Select-), 'PRIORITY' (-Select-), 'CLOSE DATE / TIME', 'DISPOSITION TYPE' (-Select-), 'INCIDENT LOCATION', 'COMMON PLACE', 'REPORTING AREA' (-Select-), 'LATITUDE', 'LONGITUDE', 'CALLER LOCATION', and 'INCIDENT NOTES'. There is a 'Geo Code' button and a 'Check Spelling' link. At the bottom, there are buttons for 'Exit', 'Update', and 'Update & Exit'.

## Call Information Tab

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

To close a call, enter the Close Date/Time and select a Disposition from this drop-down list. For more information on closing a call refer to "Close a Call" on page 156.

## Officers Tab

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

The screenshot shows the 'Officers' sub-tab of the 'Edit Call 00000001388LAH19' interface. At the top right are buttons for 'New Call', 'Toggle Officers', and 'Exit'. Below the call title are tabs for 'Call List', 'Call Map', and 'Edit Call 00000001388LAH19'. Underneath are sub-tabs: 'Call Information', 'Officers' (highlighted), 'People', 'Vehicles', 'Incident Reports', 'History', and 'Attachments'. The main area contains an 'OFFICER' label, a text input field, a 'DISPATCH DATE' label, another text input field with a calendar icon, and an 'Add' button. Below this is a table with columns: 'Primary', 'Radio #', 'Name', 'Dispatch', 'On Scene', 'Clear', and 'Actions'. At the bottom are buttons for 'Exit', 'Update', and 'Update & Exit'.

## People Tab

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

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

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

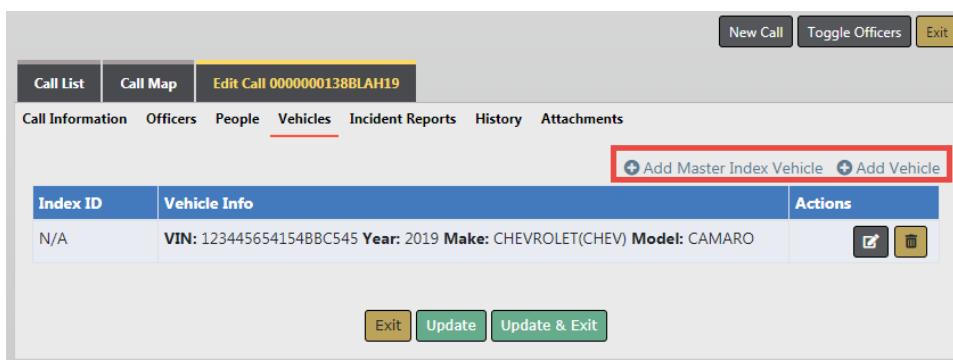
If the person record appears in the results list, click the **Hand** icon in the *Actions* columns to select it and add it to the call. If the person record does not appear in the results list, then click the **Add Person** link on the *Person Search Results* screen to create the *Master Person Index*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

**NOTE:** For more information on searching, selecting, and creating *Master Person Index* records refer to "Master Indices" on page 71.

### Vehicles Tab

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

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



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

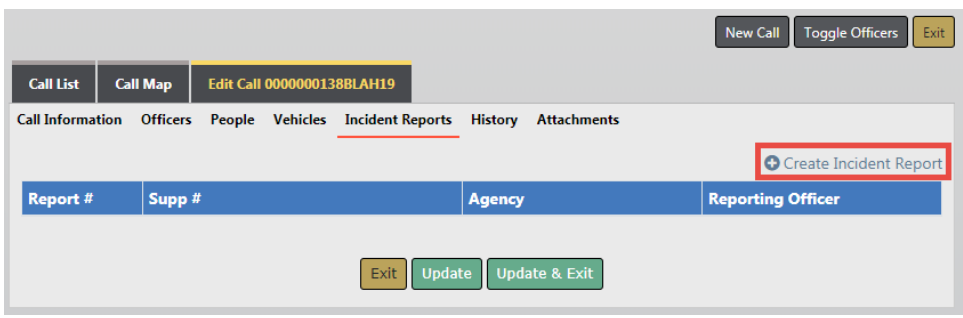
If the vehicle record appears in the results list, click the **Hand** icon in the *Actions* columns to select it and add it to the call. If the vehicle record does not appear in the results list, then click the **Add Vehicle** link on the *Vehicle Search Results* to create the *Master Vehicle Index*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

**NOTE:** For more information on searching, selecting, and creating *Master Vehicle Index* records refer to "Master Indices" on page 71.



### Incident Reports Tab

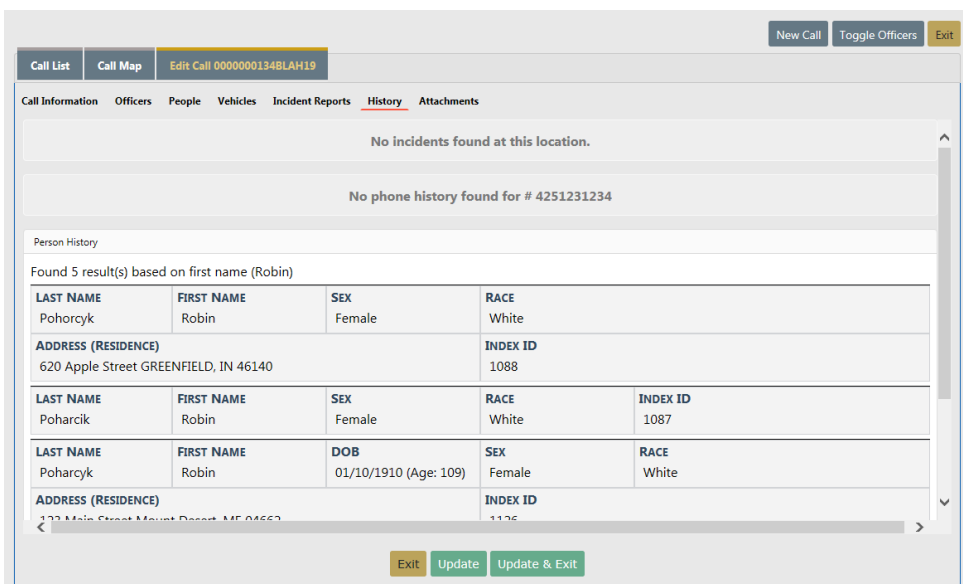
The next sub-tab is the **Incident Reports** tab. Most agencies that are using CFS within Online RMS, or a CAD product, will have the Create Incident Report permission turned off at officer level, and make all incident reports start from CFS or CAD. In CFS under the *Incident Reports* tab you will see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



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

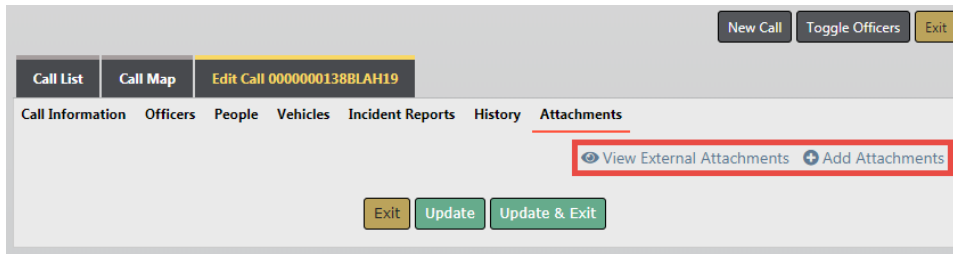
### History Tab

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



## Attachments Tab

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



**NOTE:** For more information on adding **Attachments** refer to "Attachments" on page 59.

## Call List

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

	Dispatch #	Time	Name	Address	Call / Activity	Priority	Actions
1	+ 0000000138BLAH19	11/20/2019 09:53					
2	+ 0000000137BLAH19	03/25/2019 12:28					
3	+ 0000000136BLAH19	02/11/2019 15:00	345#5	10198 Cavetown Road			

## Edit, Take, View Calls

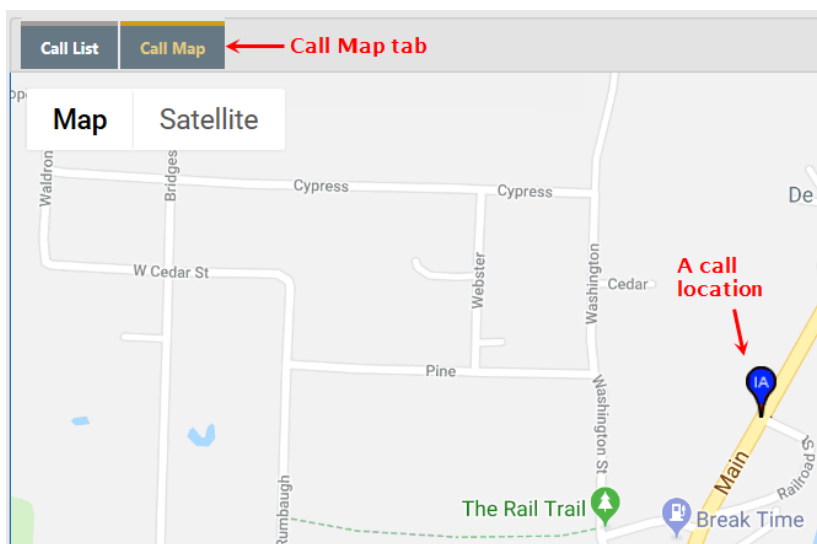
Under the *Actions* column you can edit, take, or view calls.

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

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

Select the **Toggle Officers** button at the top of the page to display a list of officers who are available to respond to a call.

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



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

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

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

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

		Dispatch #	Time	Name	Address	Call / Activity	Priority	Actions
1	+	0000000134BLAH19	01/28/2019 15:33	Kara Poharcyk				
2	+	2018-00000687	09/14/2018 08:52	Kelly Hall	E Main St, GREENFIELD, IN	TRAFFIC STOP	Low	
3	+	2018-00000596	08/29/2018 09:21	BEVERLY GOODIN	N KENSINGTON WAY, MC CORDSVILLE, IN, Hancock	JUVENILE COMPLAINT	High	
4	+	0000000133BLAH18	05/31/2018 14:26	Robin	123 main			
5	+	2018-00000061	04/30/2018 13:53	Jim Guardian	400 ELM ST, FORTVILLE, IN, Hancock	DOMESTIC	High	
6	+	ANGTES700003	04/30/2018 13:53	Jim Guardian	400 ELM ST, FORTVILLE, IN, Hancock	DOMESTIC	High	
7	+	2018-00000030	04/30/2018 03:17	Matt Johnson	600 NEW HOPE RD, ANDERSON, IN, L_SR3	DGFIGH	High	

**Officer assigned**

Radio #	Name	Dispatch	On Scene	Clear	Primary
101	1, Officer - Police Agency	08/29/2018 12:55	08/29/2018 12:56	08/29/2018 12:58	Y

**Officer is not assigned**

Radio #	Name	Dispatch	On Scene	Clear	Primary

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

Radio #	Name	Dispatch	On Scene	Clear	Primary
^=CAD6	Rantz, Greg - District 42, Versailles	Dispatch	On Scene	Clear	Y

Dispatch

---

09/14/2018 10:02

## Close a Call

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

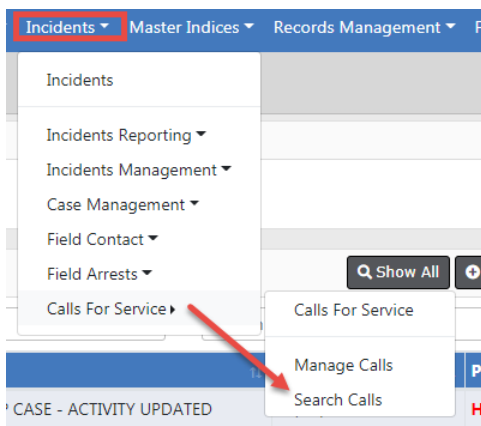
To close the call, add the clear time, clear date, and disposition on the Edit call tab of the *Manage Dispatch* form. For more information on accessing the *Manage Dispatch* form, refer to "Manage Calls for Service" on page 146.

**NOTE:** The **Clear** time/date on the *Call List* is not the same as the **Close** time and date. Closing a call also requires a disposition of the call. For more information about the *Call List*, refer to "Call List" on page 154.

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

## Search Calls for Service

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



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

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

The screenshot shows the 'Calls For Service Search' interface with the following sections and fields:

- Dispatch Search Details:**
  - DISPATCH #: Text input field.
  - CAD AGENCY: Dropdown menu (Indiana State Police).
  - RESPONDING AGENCY: Dropdown menu (All Agencies).
  - SERVICE AGENCY: Dropdown menu (All Agencies).
  - DISPATCHER: Text input field.
  - EVENT TYPE: Dropdown menu (Police).
  - CALL PRIORITY: Dropdown menu (-Select-).
  - CALL / ACTIVITY: Button labeled 'Click To Select'.
  - DISPOSITION TYPE: Dropdown menu (-Select-).
  - STATUS: Dropdown menu (-Status-).
  - CALLER NAME: Text input field.
  - CALLER PHONE #: Text input field.
  - CALL DATE FROM: Text input field with 'Last 24 Hours' and a calendar icon.
  - CALL TIME FROM: Text input field.
  - CALL DATE TO: Text input field with a calendar icon.
  - CALL TIME TO: Text input field.
  - INCIDENT REPORT #: Text input field.
  - ARREST #: Text input field.
  - NOTES: Text input field.
- Officer Details:**
  - FIRST NAME: Text input field.
  - LAST NAME: Text input field.
  - INTERNAL ID / BADGE#: Text input field.
  - SEARCH CALLS I'VE RESPONDED TO: Checkbox.
  - PRIMARY OFFICER ONLY: Checkbox.
- Person Details:**
  - FIRST NAME: Text input field.
  - LAST NAME: Text input field.
  - DOB: Text input field with a calendar icon.
  - RACE: Dropdown menu (-Select-).
  - SEX: Dropdown menu (-Select-).
  - ROLE: Dropdown menu (-Select-).
- Vehicle Details:**
  - VIN: Text input field.
  - YEAR: Text input field.
  - MAKE: Text input field.
  - MODEL: Text input field.

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

Calls can be viewed or printed.

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

[Show Map](#)
[Refine Search](#)
[New Search](#)

[Q Search Results](#)
Previous 1 Next

45324 result(s) found

Dispatch #	Agency	Dispatch Date	Call Type	Caller	Primary Officer	Location	Incident Report #	Actions
2012387			FIRE	BF20598 - (0) -		123 TOWN BLVD		

[Go Back](#)
[Print](#)
[Switch To Edit Status](#)

**Dispatch Info - 2012387**

DISPATCHER DEB	
DISPATCH AGENCY Indiana State Police	CALL DATE
CALL RECEIVED O	CALLER NAME BF20598
PRIORITY High	CALLER PHONE # (0) -
DISPOSITION TYPE	EVENT TYPE Police
	CALL / ACTIVITY FIRE
	CLOSE DATE 10/30/2012 11:46
INCIDENT NOTES	

**Location**

INCIDENT LOCATION 123 TOWN BLVD	CALLER LOCATION
COMMON PLACE NAME	REPORTING AREA
LATITUDE	LONGITUDE

[Go Back](#)

Scroll down to view additional call details.

Click the **Print** button to print.

If applicable, click the **Switch to Edit Status** to edit the call. For more information on editing a call, refer to "Edit a Call" on page 149.

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

[Calls For Service Search](#) / [Calls For Service Search Results](#) / [View Dispatch](#)

[Go Back](#)
[Print](#)
[Switch To Edit Status](#)
[Create Incident](#)

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

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

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

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

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



# Chapter 11. Incidents

## Incidents Overview

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

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

**Note:** If the CFS module and integration is turned on, and the integration process cannot match people that exist on the CFS record with RMS, the unmatched names appear on the Names tab of the Incident Report. With appropriate permissions, you have the option to add unmatched people to the Master Index in RMS, then associate them with the Incident Report. For details, refer to "Incident Report Section – Names Tab" on page 186.

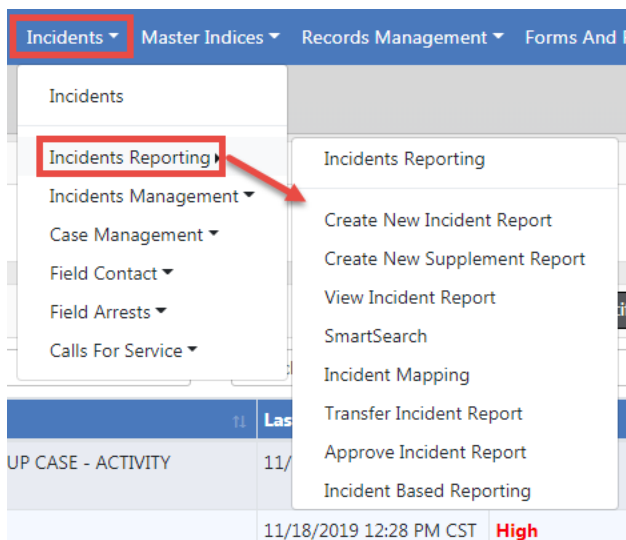
- **Incident Reporting** includes the following activities:
  - Create New Incident Report manually, or by integration from Caliber CAD, if applicable.

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

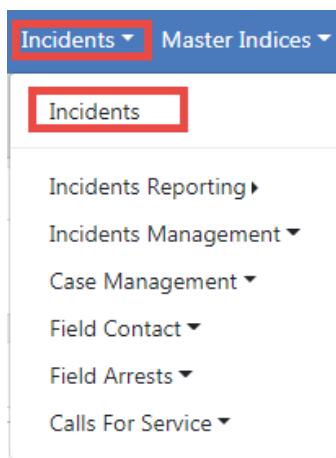
- Create Supplement to Incident Report
- View Incident Report

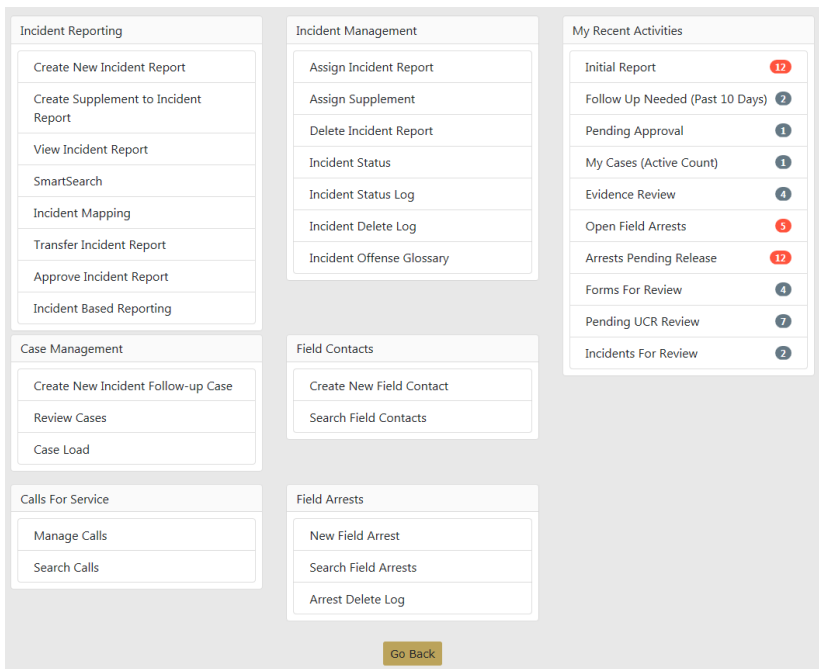
**Note:** With appropriate permissions, investigators can create a case on an initial unapproved Incident to begin working on an investigation without waiting for Incident approval. Refer to "Create a Follow-Up Case" on page 385 for details.

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



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

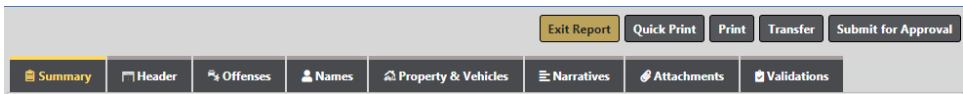




**NOTE:** Items that appear are based on permissions and vary by user.

## Top Buttons

The **Incident Report** contains various buttons that enable the user to *Exit Report*, *Quick Print*, *Print*, *Transfer* the report to a different user, *Show* or *Exit* the *Wizard*. The *Submit for Approval* button remains inactive (gray) until the components of the report are completed appropriately and the report is ready for review by an officer supervisor or CID supervisor.



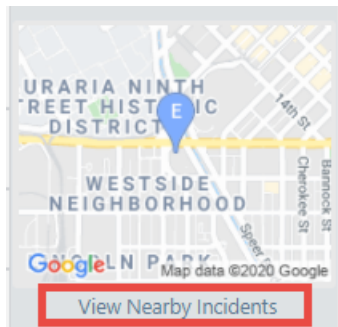
The top buttons appear regardless which tab the user is on.

## Google Maps Integration

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

Report Location			
<b>ADDRESS</b> 1770 Block of Lincoln Denver, CO 80104	<b>LATITUDE</b> 39.739577	<b>LONGITUDE</b> -104.999408	
<b>REPORTING AREA</b>	<b>INCIDENT NIBRS CITY</b> CANNELTON	<b>INCIDENT LOCATION REMARKS</b>	
<b>COMMON PLACE NAME</b>	<b>CAMPUS CODE</b> Off Campus		
<b>GEOGRAPHIC LOCATION</b> District 42. Versailles	<b>COUNTY OF OCCURRENCE</b> Hancock	<b>TOWNSHIP OF OCCURRENCE</b>	

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



## Incident Report – Requirements And Rules

### Requirements:

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

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

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

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

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

**Incident Rules:**

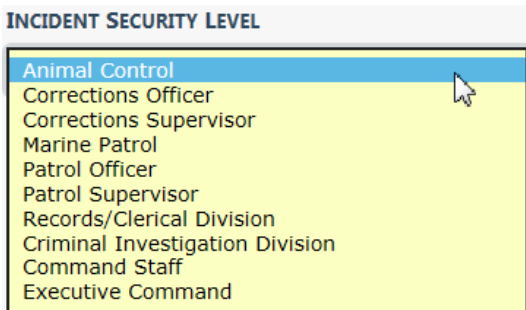
- The Initial Report is designated as “Supp# 0” and Supplements are then added in sequential order (e.g., Supp. # 1, 2, 3, etc.).
- A user can submit another report owner's Incident.
- Incidents can be edited when in *Initial* or *Disapproved* status, otherwise will result in a Supplement.
- Incidents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

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

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

## Incident Security

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



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

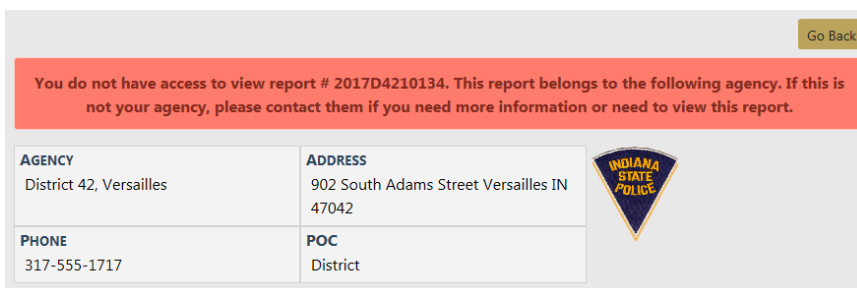
The default security for Incident Reports is set at the *Patrol Officer* level. This means users with *Patrol Officer* security rights can:

- View Incident Supplements having a security level of *Patrol Officer* or less.

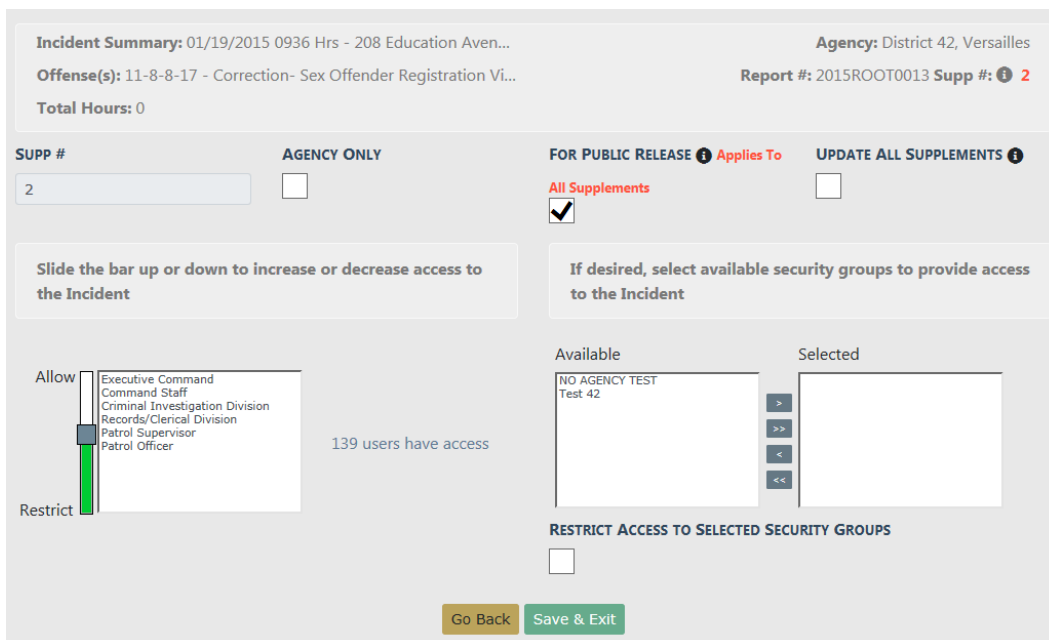
- Cannot view Incident Supplements having a security level greater than *Patrol Officer*, unless the user is added to a security group assigned to the Incident Report.

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

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



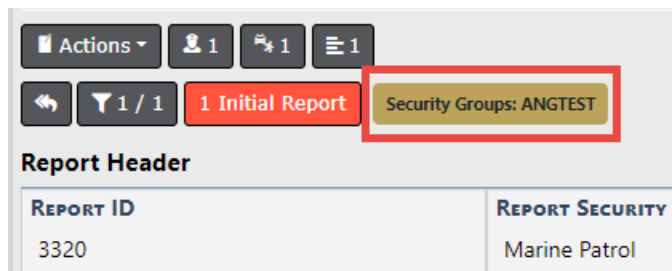
The security of an Incident Report can be set by clicking on **Change Security** button from the **Incident Approve/Disapprove** screen when supervisors approve the supplement.




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



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

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



The **Incident Security** screen can also be accessed at any time through the **Incident Status** screen by clicking on the **Security** icon .

The screenshot shows the 'Incident Summary' screen. At the top right are buttons for 'Go Back', 'Quick Print', 'Print', and 'Update Report #'. The summary text includes: 'Incident Summary: 03/06/2019 1435 Hrs - 100 North Main Street BLO...', 'Agency: District 42, Versailles', 'Offense(s): 35-45-1-3 - PUBLIC ORDER- DISORDERLY CONDUCT', 'Report #: 2019D4210217 Supp #: 2', and 'Total Hours: 0'. Below this is a table with the following data:

<input checked="" type="checkbox"/>	Report Type	Date	Reporting Officer	Supplement Owner	Approval Status	Security Level	Actions
<input checked="" type="checkbox"/>	Original Report	03/06/2019	Christine Saur #SAUR111	Christine Saur	Pending Approval	Patrol Officer	 

You can access the **Incident Status** screen from the *View Incident Report* screen, or from the *Incident Report* menu. For more information on accessing the *Incident Report* menu, refer to "Incidents Overview" on page 161. For information on changing the Incident Status, refer to "Changing Incident Status" on page 229.

## Incident Report – Report Validations

The Online RMS program has a built-in **Wizard** that guides you through the creation of the **Incident Report**. Navigational buttons are displayed to navigate through the report. The use of the Incident **Wizard** is highly recommended.

*National Incident-Based Reporting System (NIBRS)* validations use tab indicators to assist the user in entering all required information. The required information may change depending on the offense(s) added to the report. A tab that lists NIBRS validation information displays on the **Incident Validations** tab.

The screenshot shows the 'Validations' tab selected in the incident report interface. The page displays the following information:

- Exit Report**, **Quick Print**, **Print**, **Transfer**, **Exit Wizard**, **Submit For Approval** buttons.
- Navigation tabs: **Summary**, **Header**, **Offenses**, **Names**, **Property & Vehicles**, **Narratives**, **Attachments**, **Validations** (highlighted).
- Incident Summary: 07/16/2018 2300 Hrs
- Offense(s): 35-43-2-1 B02 - BURGLARY- APARTMENT COMPLEX
- Agency: District 42, Versailles
- Report #: 2018D4210173 Supp #: 0

**Verify Incident Report**

Online RMS has found errors on the incident report which require attention before the report may be submitted. You may use the links below to help guide you to the particular area of the report needing modification. Once all of the errors have been resolved, you may submit the report for approval.

<a href="#">Add Narrative</a>	At least one Narrative is required.
<a href="#">Incident Officers</a>	At least one Reporting officer is required.
<a href="#">Selected Incident Types</a>	Incident Types are required for incidents from this agency.
<a href="#">Incident Summary</a>	Incident report requires a Media/Crime Summary.
<a href="#">Add Incident Location and NIBRS City</a>	Incident Location, NIBRS City is Required.
<a href="#">35-43-2-1 B02 - BURGLARY- APARTMENT COMPLEX</a>	Offense requires Property or Vehicle details.
<a href="#">35-43-2-1 B02 - BURGLARY- APARTMENT COMPLEX</a>	Offense Requires Victim Type of Person or Organization
<a href="#">35-43-2-1 B02 - BURGLARY- APARTMENT COMPLEX</a>	Offense requires Victim and Victim to Offender Relationship.
<a href="#">County of Occurrence</a>	County of Occurrence is required for incidents from this agency.

The **Incident Validations** tab lists any missing required information to assist you. Click on any of the validations listed in **Incident Validations** to return to the area within the report to add or edit data. Once all the minimum required information has been entered, the report can be submitted for approval.

Click the **Exit Wizard** button to view and edit the report in **Form Mode**. This mode allows you to navigate through the necessary tabs in any order without following the linear style used in the **Wizard** mode. Navigating to the **Summary** tab, or clicking on the tabs instead of the navigational buttons, may also cause you to exit the **Wizard** mode. Click the **Show Wizard** button at the top of the page to return to **Wizard** mode.

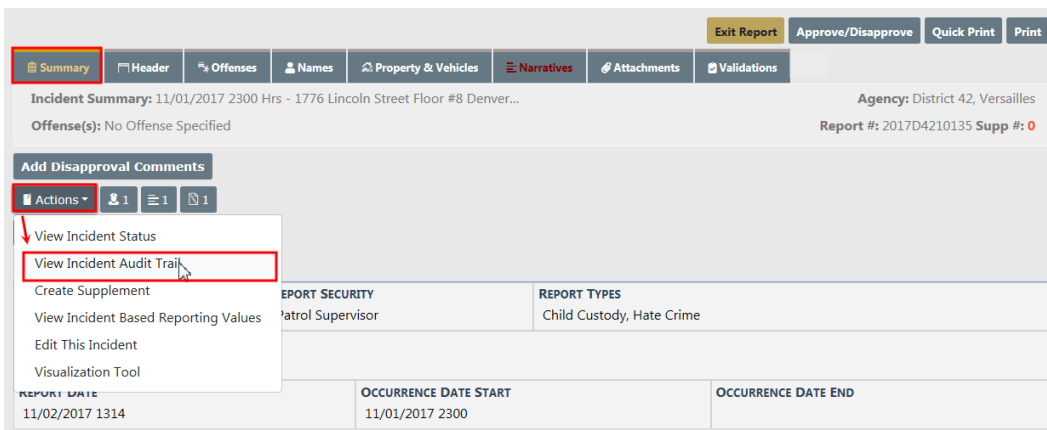
**Note:** The **Wizard** mode is only available when editing a *Supp 0* incident.



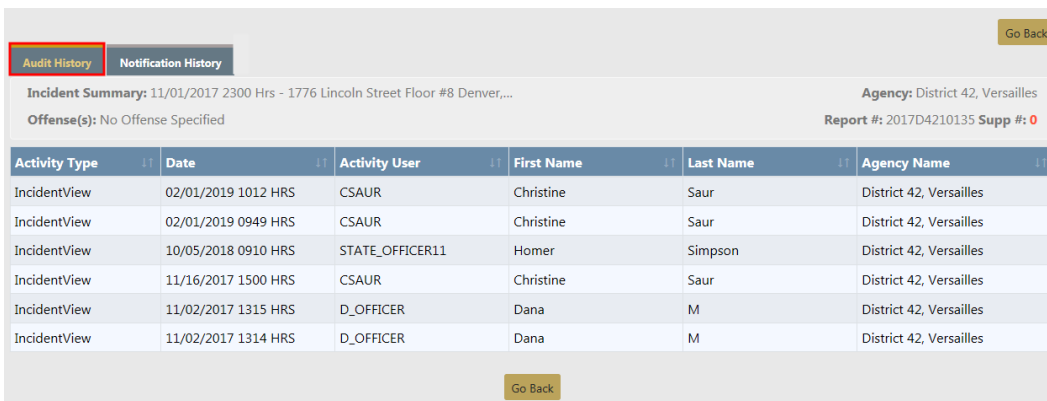
## View Incident Audit Trail

Another valuable security tool for the Investigator is the **View Incident Audit Trail** feature. Information is captured anytime someone accesses an incident report. If you suspect another user is accessing or attempting to access an incident report set above their security level, you can view these access attempts.

To view the audit entries, select *View Incident Report*. When the correct report is located and selected, select the **Actions** button, then **View Incident Audit Trail** menu option



Anyone who accesses or attempts to access the Incident Report appears in the Audit History.



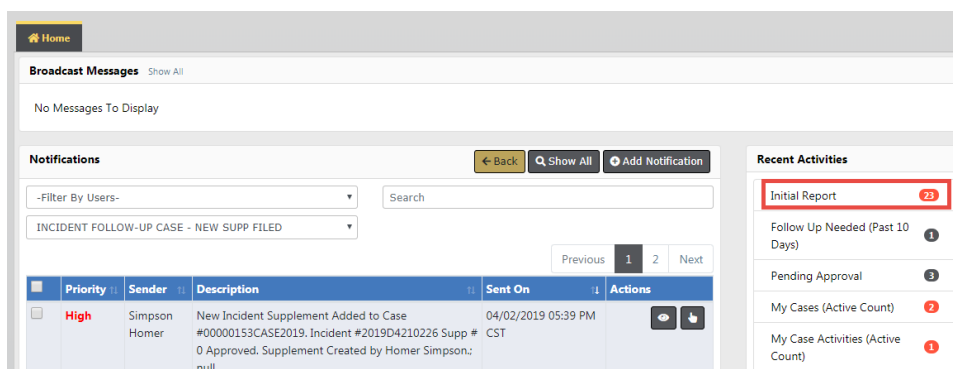
## Create Incident Report

The Incidents module is where you input, retrieve, and edit professional law enforcement reports. Create reports step-by-step using the **Incident Report Wizard**. Each report is validated against state or federal guidelines which are driven by any offense(s) entered on the report.

Depending on your agencies configuration, incidents may be created manually or automatically via the **Caliber CAD** interface. Mobile users may also have access to generate a report in CAD using **Caliber Mobile**.

**Incident Reports** generated by **Caliber CAD**, or other CAD system through a system interface, will contain information generated by CAD or imported through the CAD interface.

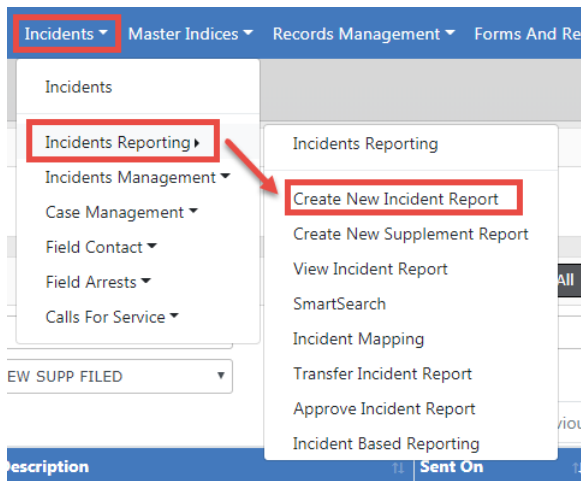
Once logged into Online RMS the Home Page displays. You can edit the CAD generated Incident from the *Recent Activities* section under **Initial Report** by clicking on the number to the right.



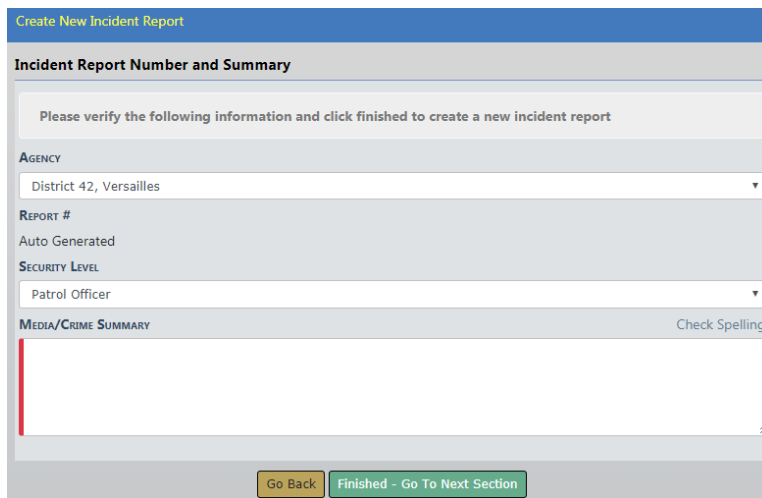
**Incident Reports** generated by the *Calls For Service* module contain the call dates and times in the **Header** tab. When you log into Online RMS, you can edit the CFS generated Incident from the *Recent Activities* section under **Initial Report**. These calls can be searched using the *Calls for Service* module. The associated call will show in the **Header** and **Summary** tabs of the **Incident Report**.

Incidents created manually by officers will use the following workflow:

The **Create New Incident Report** feature is located in the **Incidents** menu under **Incident Reporting**.



This allows you to create a report using your agency's numbering format. Some agencies will use *Automatic Number Generation* where the Incident report number will be populated automatically, and some agencies will have the opportunity to manually enter the report number based on the agency's business practice.

A screenshot of the 'Create New Incident Report' form. The form is titled 'Incident Report Number and Summary' and contains the following fields: 'AGENCY' (District 42, Versailles), 'REPORT #' (Auto Generated), 'SECURITY LEVEL' (Patrol Officer), and 'MEDIA/CRIME SUMMARY' (empty). There is a 'Check Spelling' link next to the Media/Crime Summary field. At the bottom, there are two buttons: 'Go Back' and 'Finished - Go To Next Section'.

Select the Security Level, if different than the default.

Enter the Media/Crime Summary, and optionally click *Check Spelling* to validate and correct any spelling errors.

Click **Finished - Go To Next Section**. The wizard steps you through each tab, one at a time.

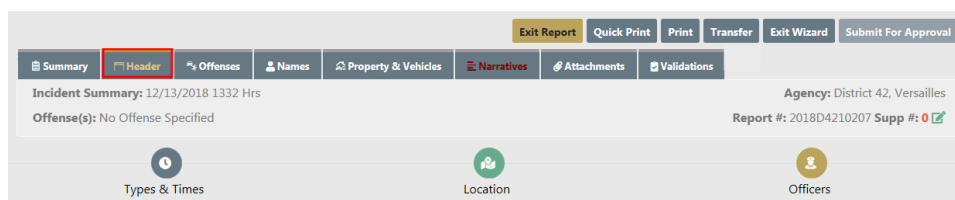
## Incident Report Tabs

- *Summary tab*-provides a summary of all the information entered on an incident report.
- *Header tab*- captures the dates/times, report location, and reporting officer(s), associated arrests, and associated calls for service for the incident.
- *Offenses tab*-captures any and all offenses associated with the report. Validations are offense driven and will alert the user of necessary information.
- *Names tab*-captures Offenders, Victims, and Other Incident Names such as witnesses who are associated with the report.
- *Property & Vehicles tab*-captures applicable property or vehicles associated with the report. Evidence is also created in this section (See Incident Evidence section for a detailed explanation).
- *Narratives tab*-captures the users narration of the details surrounding the incident.
- *Attachments tab*-captures an incident related attachments such as crime scene photos or statements. Forms such as the Marijuana Eradication Form can be completed in this section also.
- *Validations tab*-does a final check of your report to ensure the minimum requirements are met based on the offense(s) entered on the report.

### Incident Report Header Tab

Regardless of which method is used to initiate the report, the following workflow is the same for editing and completing a report; the only difference you may see is pre-populated information from CAD or Calls For Service module.

The **Header Tab** contains 3 separate sections: *Report Types & Times*, *Location*, and *Officer*. By using the **Wizard** the sections are completed in the listed order, though the use of the **Wizard** is not required.



Click on each button to access that information.

## Report Types & Times

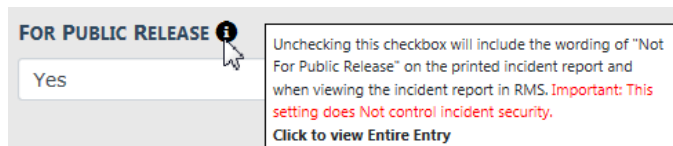
The *Header Information* area includes Report Security, For Public Release, Report Agency/District, the Media / Crime Summary box, Incident Report Types, Report Date, Occurrence Date Start, Incident Classification, and other information.

### Report Security

Select the Incident Report security level.

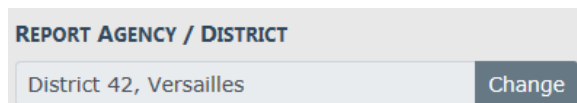
### For Public Release

This field defaults to **Yes**. Change this value to **No** if this Incident should not be public. Hover over or click on the information bubble for more information.



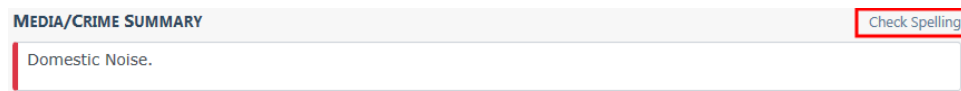
### Report Agency/District

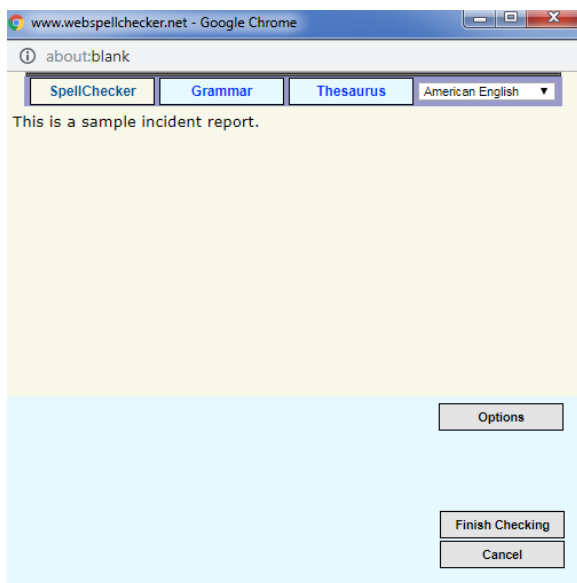
Select the **Change** button to change the listed reporting agency. You must have proper permissions to access this function.



### Media/Crime Summary

The Media/Crime Summary is designed to enter a brief description of the Incident. After entering a description, optionally select **Check Spelling** to open the *WebSpellChecker* window. When finished checking your entered text, select **Finish Checking**.

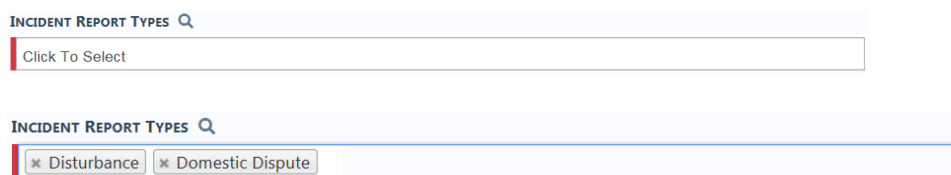




### Incident Report Types

The Incident Type selection box is designed to categorize the general nature of the incident. Multiple selections may be selected to cover all applicable types that occurred during the incident. Incident Type is a searchable field when searching for incidents.

Click into the box and select all the applicable Incident Report Types from the provided list.



Click on the **X** to remove a selected type from the list.

### Incident Report Dates and Times

The Incident Report Times area contains the various times associated with the incident, Report Date, Occurrence Date, Dispatch Date, On Scene Date and Clear Date. These incident date(s) and time(s) may be completed in Incident Reports generated by Caliber CAD or by the Calls For Service module but they still need to be verified by the user for completeness and accuracy. Editing is permitted as needed.

Any field with a red left-hand border is a required field. You must complete required fields to continue.

<b>REPORT DATE</b> 03/12/2019 1145	<b>OCCURRENCE DATE START</b> 03/12/2019 1145	<b>OCCURRENCE DATE END</b>
<b>DISPATCH DATE</b>	<b>ON SCENE DATE</b>	<b>CLEAR DATE</b>

You can click on the date icon on the right of each date field to select a date and time, or type T in the field then tab out to return the current date and time.

### Additional Information

Complete the Additional Information section as needed.


### Field Arrests and Calls For Service






Click on the **Add Field Arrest** link to associate a Field Arrest to the Incident, if applicable.

<b>Field Arrests</b>	<a href="#">+ Add Field Arrest</a>
<b>Calls For Service</b>	

Enter the search criteria in the *Field Arrest Search* form to locate the Arrest record, then click the **Search** button.

<b>Go Back</b>			
<b>LAST NAME</b> Jones	<b>FIRST NAME</b> Williams	<b>SSN</b>	<b>RACE</b> -Select-
<b>SEX</b> -Select-	<b>DOB</b>	<b>AGE</b> To	
<b>ARREST DATE FROM</b>	<b>ARREST TIME FROM</b>	<b>ARREST DATE TO</b>	<b>ARREST TIME TO</b>
<b>ARREST #</b>	<b>AGENCY</b> -All Agencies-	<b>REFERENCE #</b>	<b>REFERENCE # TYPE</b> -Select-
<b>STATUS</b> -Select-	<b>REVIEW STATUS</b> -Select-	<b>PLATE #</b>	<b>WARRANT REFERENCE #</b>
<b>INCIDENT REPORT #</b>	<b>CHARGE CODE</b>	<b>INDEX ID</b>	
<b>Officer</b>			
<b>FIRST NAME</b>	<b>LAST NAME</b>	<b>BADGE #</b>	<b>ROLE</b> -Select-
<b>ADDITIONAL SEARCH CRITERIA</b> -Select-			
<b>Go Back</b> <b>Reset</b> <b>Search</b>			

Click on the **Select** icon  in the *Actions* column to select the appropriate record in the *Search Results* window.

Arrest Number	Status	Arrest Date	LastName	First Name	Charges	Warrants	Incidents	Actions
1708568	Open	08/03/2017 0904	JONES	WILLIAMS	35-43-2-2 C04 - CRIMINAL TRESPASS- RESIDENCE/DWELLING		2017-PERY-0034, 2017D4210117, 2017D4210119	  
2013-0077	Completed	10/28/2013 0500	JONES	WILLIAMS	35-43-4-2 T13 - THEFT- BUSINESS SIGNS			 

In the *Associate Dispatches* window, select the **Calls for Service** records to associate with the Incident, if any. Then click **Save** to associate the records, or **Close** to ignore the request.

Associate Dispatches

Field Arrest #1708568 has the following Calls for Service record(s) associated.

Please indicate if you'd like to associate the following Calls for Service record(s) to the Incident.

Calls For Service #2017-00000819

Close Save

If you chose to associate the **Calls for Service** records, the Associate Incident form appears. Select all specifics that apply, then click **Save**.

Go Back

Incident Summary: 12/13/2018 1332 Hrs Agency: District 42, Versailles

Offense(s): No Offense Specified Report #: 2018D4210207 Supp #: 0

Select All

**Location**

439 North East ASHWOOD Lane, North Test DILLON, SC  Include Location (Incident Location)

**Officers**

Name	Role	Actions
Saur, Christine	Arresting	<input checked="" type="checkbox"/> Include Officer
Saur, Christine	Discharging	<input type="checkbox"/> Include Officer

**Offenses**

Offense Code	Description	Actions
35-43-2-2 C04	CRIMINAL TRESPASS- RESIDENCE/DWELLING	<input checked="" type="checkbox"/> Include Offense

The data then appears in the Arrest and Calls for Service sections.


Click the **Continue** button to progress to the *Report Location* tab.

### Location

The Location is completed by selecting the geographic location, county of occurrence, township (if applicable) where the incident occurred. The incident address is also added on this screen by utilizing the Master Indices. There are three options available on this page: *View Location Details*, *Update Details*, or *Change Location*.



**Location** [View Location Details](#) [Update Details](#) [Change Location](#)

<b>ADDRESS</b> .1001 North East Main Street INDIANAPOLIS, IN	<b>LATITUDE</b> 39.872057	<b>LONGITUDE</b> -86.142280	
<b>REPORTING AREA</b> --Select--	<b>INCIDENT NIBR CITY</b> --Select--	<b>INCIDENT LOCATION REMARKS</b> <input type="text"/>	
<b>COMMON PLACE NAME</b> --Select--	<b>CAMPUS CODE</b> --Select--		
<b>GEOGRAPHIC LOCATION</b> District 42, Versailles	<b>COUNTY OF OCCURRENCE</b> --Select--		

[Back To Previous Section](#) [Save & Continue](#)

Any field with a red left-hand border is a required field. You must complete required fields to continue.

If no Location exists, click the provided link to add one.

**Location**

No location specified. Click [here](#) to add a location.

### View Location Details

This displays two tabs, *Address Details* and *Address Summary*, that lists all involved incidents tied to this location, and details about the location itself.

Go Back Visualization Tool Update Details Subscribe

Address Details Address Summary **Two tabs**

Audit Off SmartSearch (0)

**INDEX ID**  
14

STREET #	DIRECTION	STREET NAME	TYPE
1001	North East	Main	Street
DIRECTION SUFFIX	SUB TYPE	SUB #	CITY
			INDIANAPOLIS
STATE	ZIP	COUNTY	COUNTRY
Indiana	-	Allen	United States of America
COMMENTS			

**Map**

View Incidents In This Area

**Total Involvements**

Incidents	11/21/2019	20
FieldInterviews	04/19/2012	1
FieldArrests	05/31/2019	10
CourtPapers	12/29/2014	1

**By Offense Category**

Property	7
Person	4
Society	3
Vehicle	3
Drug Type	1

**Common Event Associations**

Person	1
--------	---

Go Back

Go Back Visualization Tool Update Details Subscribe

Address Details Address Summary

**Total Involvements**

Incidents	11/21/2019	20
FieldInterviews	04/19/2012	1
FieldArrests	05/31/2019	10
CourtPapers	12/29/2014	1

**By Offense Category**

Property	7
Person	4
Society	3
Vehicle	3
Drug Type	1

**Common Event Associations**

Person	1
--------	---

**Involved Incidents**

Report #	Agency	Status	Offense	Date Of Info
2019D4210231	District 42, Versailles	Initial Report		11/21/2019
2019D4210218	District 42, Versailles	Initial Report		03/12/2019
2015ROOT0140	District 42, Versailles	Initial Report	ⓘ	07/10/2015
14-00020	Police Agency	Approved Report	ⓘ	11/10/2014
2013-0166	District 16, Peru - GA	Initial Report	ⓘ	11/21/2013

### Update Details

Update Details allows you to update the details of the location.

### Change Location

Change Location allows you to change the location, address of the Incident. You may also add an address to the Master Index if it doesn't already exist.



First search for an existing address to determine if the address already exists before adding a new one. It is recommended that you search by individual fields rather than the *Quick Search* field. See "Adding Address" on page 94 for further instructions on adding addresses to the Master Index.

If adding a new address, click the **Save and Select** button. This saves the address to the Master Indices and selects the record for the report.

Click the **Save & Continue** button at the bottom of the window to advance to *Officers*.

### Officers

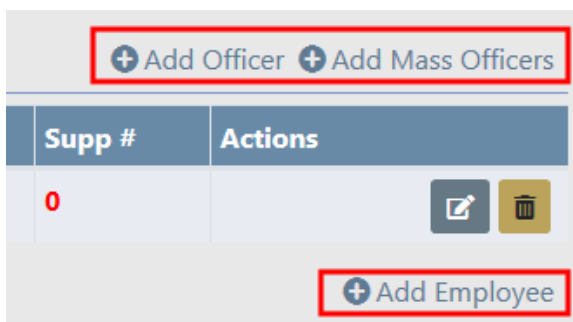
The Officers section is where all officers and employees involved in the incident are listed. The officer creating the report will default as the *Reporting Officer*.

Officers								<a href="#">+ Add Officer</a>	<a href="#">+ Add Mass Officers</a>
Last Name	First Name	ID	Title	Agency	Incident Role	Supp #	Actions		
Saur	Christine	SAUR111		District 42, Versailles	Reporting	0	 		

Employees								<a href="#">+ Add Employee</a>
								<a href="#">Back to Previous Section</a> <a href="#">Finished - Go To Next Section</a>

Click the **Add Officer**, **Add Mass Officers**, or **Add Employee** hyperlink to add additional officers or employees.



### Add Officer

Use this link to add one officer at a time. Begin entering the officer name in the **Find Officer** field to display a list of names that match the entered text, then click the appropriate name from the list. Select the **Role** from the drop-down list.

Add Incident Officer

[Q Search Officers](#) [Add Other Agency Officer](#)

**FIND OFFICER**

**ROLE**

-Select-

[Cancel](#) [Save](#)

**NOTE:** All Supplement reports must have a *Reporting Officer* associated with the report.

Select **Add Other Agency Officer** to add officers from other agencies. These are officers who are not Online RMS users within the current schema.

Add Incident Officer

Q Search Officers **Add Other Agency Officer**

FIRST NAME	MIDDLE NAME	LAST NAME	SUFFIX
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
AGENCY	TITLE	BADGE #	CAD BADGE # ⓘ
District 42, Vers	<input type="text"/>	<input type="text"/>	<input type="text"/>
ROLE			
-Select-			

Cancel Save

Click **Save** to add the officer to the Incident.

### Add Mass Officers

Use this link to add multiple officers at one time. Begin entering the officer name in the **Find Officer** field to display a list of names that match the entered text, then click the appropriate name from the list. Select the **Role** from the drop-down list. Click **Add Officer** to add another officer, and repeat until all officers are included.

Add Incident Officers

Click to add additional officers → **+ Add Officer**

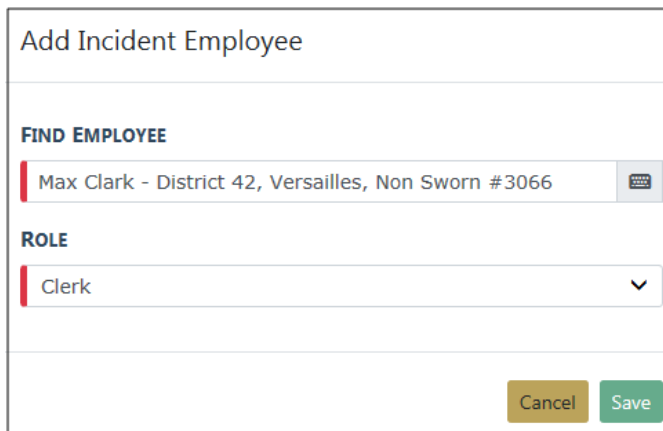
FIND OFFICER	ROLE	
icer Joe Hedges(Badge #: 7049) - All Other	Assisting	<input type="button" value="🗑"/>
FIND OFFICER	ROLE	
<input type="text"/>	-Select-	<input type="button" value="🗑"/>

Cancel Save

Click **Save** to add all selected officers to the Incident.

### Add Employee

Use this link to add an employee to the Incident. Begin entering the employee name in the **Find Employee** field to display a list of names that match the entered text, then click the appropriate name from the list. Select the **Role** from the drop-down list.



Add Incident Employee

**FIND EMPLOYEE**

Max Clark - District 42, Versailles, Non Sworn #3066

**ROLE**

Clerk

Cancel Save

Click **Save** to add the employee to the Incident.

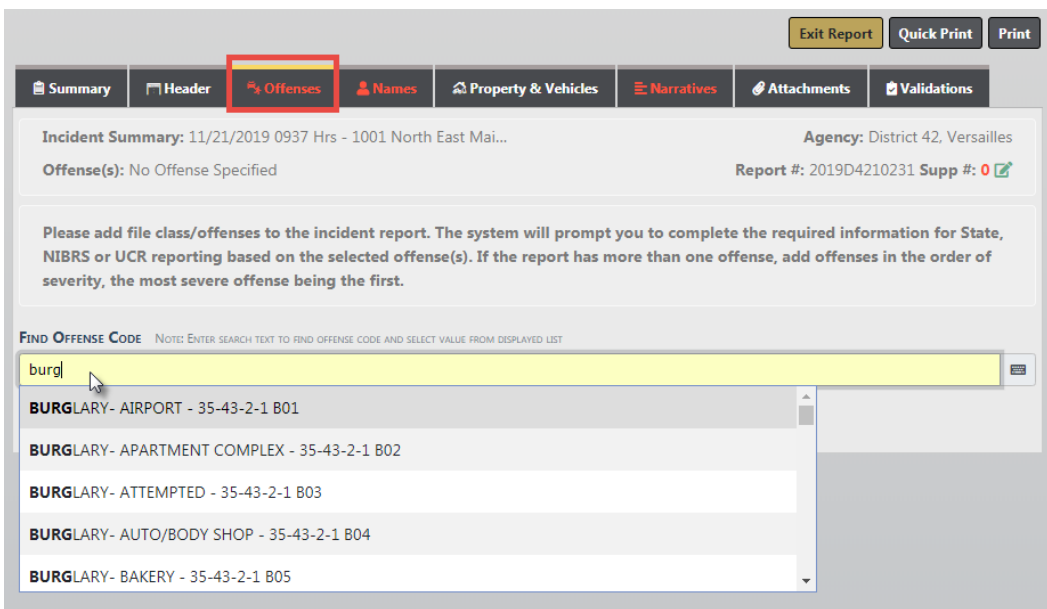
Click the **Finished - Go To Next Section** button to advance to the *Offenses* tab.

### ***Incident Report Section – Offenses Tab***

Upon completing the three sections of the **Header Tab** you are then taken to the **Offenses Tab**, where you enter any applicable offenses for the incident report.

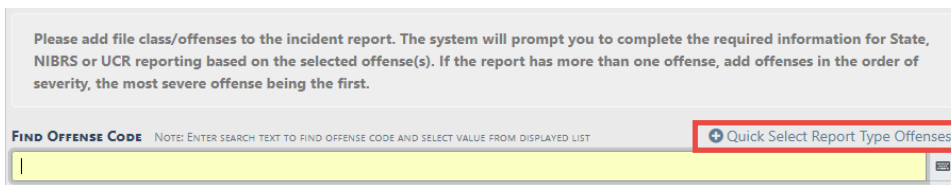
If no offense was committed during this incident, select the **Skip Offense Section** and you are taken to the next tab of the report, the **Names** tab. This ability to skip the offense section allows for the agency to create incidents for recording non-criminal incidents (accidents, civil matters, ordinance violations, etc.).

To add an offense, begin by entering text into the **Find Offense Code** field and select a value from the displayed list. If the offense you entered is not found, refine your search text and the results will refresh as well. If the offense is still not located, contact your agency administrator.

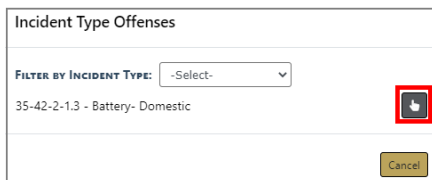


If your agency administrator relates an offense to one or more Incident Types, the offense requires at least one of the related offenses on the Incident Report when that Incident Type is added to an Incident Report.

In this case, a **Quick Select Report Type Offenses** link appears on the Offenses tab.



Click the link to open a dialog box that lists the offense(s) from which to choose. You can filter by Incident Type by selecting from the list. Only one offense appears in the below example for illustration purposes.



If you do not choose a related offense, a notification appears on the Validations tab.

Add Narrative	At least one Narrative is required.
Add Incident Location and NIBRS City	Incident Location, NIBRS City is Required.
Domestic Dispute	Requires at Least One Related Offense
County of Occurrence	County of Occurrence is required for incidents from this agency.

Once the offense has been selected, the system will display the **Offense Details**. This screen is used to describe the status of the offense and collect information related to state reporting guidelines.

The screenshot shows the 'Offense Details' form. At the top, there are buttons for 'Exit Report', 'Quick Print', and 'Print'. Below that is a navigation bar with tabs: 'Summary', 'Header', 'Offenses' (highlighted), 'Names', 'Property & Vehicles', 'Narratives', 'Attachments', and 'Validations'. The main content area shows 'Incident Summary: 12/13/2018 1332 Hrs - 456 Main STC...' and 'Agency: District 42, Versailles'. Below this, it lists 'Offense(s): 35-43-2-1 B03 - BURGLARY - ATTEMPTED' and 'Report #: 2018D4210207 Supp #: 0'. The 'Offense Details' section contains several dropdown menus: 'OFFENSE STATUS' (Open/Pending), 'OFFENSE STATUS DATE' (12/13/2018 1332), 'REMARKS' (empty), 'SELECT A CHARGE' (-Select-), 'ATTEMPTED / COMPLETED' (Attempted), 'CARGO THEFT' (No), 'BIAS' (None (No Bias)), 'TYPE OF LOCATION / PREMISE' (Other/Unknown), 'SPECIFY WHETHER FORCE OR NO FORCE WAS USED BY AN OFFENDER TO ENTER A STRUCTURE?' (No), and 'OFFENSE SUSPICION' (Not Applicable). There are also buttons for 'NONE (NO BIAS)', 'OTHER/UNKNOWN', and 'NOT APPLICABLE'. At the bottom, there are 'Go Back' and 'Update' buttons.

Select the appropriate answers about the offense by using the drop down menus or multi-select menus provided.

Click on **None**, **Unknown**, and **Not Applicable** buttons to quickly enter that selection into the field, when applicable.

This close-up shows three specific fields from the form. The first is 'BIAS' with a dropdown menu showing 'None (No Bias)' and a 'NONE (NO BIAS)' button. A red arrow points to this button. The second is 'TYPE OF LOCATION / PREMISE' with a dropdown menu showing 'Other/Unknown' and an 'OTHER/UNKNOWN' button. A red arrow points to this button. The third is 'OFFENSE SUSPICION' with a dropdown menu showing 'Not Applicable' and a 'NOT APPLICABLE' button. A red arrow points to this button.

After the mandatory questions have been completed, select the **Save** button, which will then take you back to the **Offenses** tab for review.



Exit Report Quick Print Print Transfer Exit Wizard Submit for Approval

Summary Header **Offenses** Names Property & Vehicles Narratives Attachments Validations


Incident Summary: 12/13/2018 1332 Hrs - 456 Main STCT Apart... Agency: District 42, Versailles  
Offense(s): 35-43-2-1 B03 - BURGLARY- ATTEMPTED Report #: 2018D4210207 Supp #: 0

**Offenses** Update All Offenses' Status Add Offense

NIBRS	Severity	Offense	Remarks	Status Date	Status	Supp #	Actions
220	1	35-43-2-1 B03 BURGLARY- ATTEMPTED		12/13/2018 1332	Open/Pending	0	

**Modus Operandi** Add Modus Operandi

Back To Previous Section Finished - Go To Next Section

Hover your mouse over the information bubble  to the left of the NIBRS code to view the NIBRS Crime Description.

Additional offenses may be added by clicking the **Add Another Offense** hyperlink and repeating the same process.

Click on the **Update All Offense's Status** hyperlink to update the offense status and status date on all edited offenses on the Supplement.

Update All Offenses' Status

For the edited Offenses on this Supplement, the Offense Status and Status Date entered below will be applied.

**OFFENSE STATUS**  
-Select-

**OFFENSE STATUS DATE**

Cancel OK

Select the **Offense Status** and enter the **Offense Status Date**, then click **OK**.

Depending on the offense(s) selected on the Incident, certain tabs may turn red. This indicates that additional information in those tabs is needed to validate the state reporting requirements for the agency. Placing the mouse pointer over the red tab displays a pop-up window displaying the required information.

Optional **Modus Operandi** information can also be added at the bottom of the page. Clicking the **Add Modus Operandi** link will display the **Modus Operandi** page where entry, exit, method, means, and trademark information can be added and associated to one or more of the offenses listed on the report.

Click **Save** after entering or selecting all required fields on the **Modus Operandi** page.

Click the **Finished – Go To Next Section** button to advance to the *Names* tab.

### ***Incident Report Section – Names Tab***

The **Names Tab** contains the list the names of all persons and organizations involved in the incident. The names section is broken into three sections, the *Offender*, *Victim*, and *Other Names*.

Agencies using Caliber CAD and entering person contact data, the Person Name data is automatically added to the incident report in Online RMS without user action using one of the following criteria:

- *Person exact match.* Caliber CAD CFS Contact Type matches Online RMS involvement role.

- Person is added to the incident report Offenders, Victims, or Other Names section automatically without user action.
- *Person exact match.* Caliber CAD Person Contact Type is **not** provided **nor** matches Online RMS involvement role.
  - Person is added to Master Person Index automatically without user action. Use **Quick Select Names - CF People** option to add person to incident report.
- *No Person exact match.*
  - Use **Quick Select Names - CFS People** option to create the master person index record and add to the incident report.










**Quick Select Names - CFS People**

If the CFS module and integration is turned on, and the integration process cannot match people that exist on the CFS record with RMS, the unmatched names appear in this section of the **Names Tab**. With appropriate permissions, you have the option to add unmatched people to the Master Index in RMS, then associate them with the Incident Report.

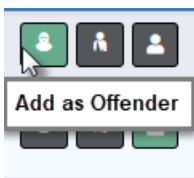
Incident Summary: 02/11/2019 0800 Hrs - 420 Oakbend Drive Lewis... Agency: District 42, Versailles  
 Offense(s): No Offense Specified Report #: 2019D4210213 Supp #: 0

Note: People listed in the below grid are from the CFS call on this report. These people could not be matched with RMS results due to too little information. You can use the provided actions to add them and use the person add screen to enter the missing information and select a potential duplicate.

**Quick Select Names - CFS People**

Name	Address	Physical Description	Call #	Roles	Actions
Jones, Susan Sex: Female			0000000139BLAH20	Suspect / Offender	  
Henry, Fred Sex: Male			0000000139BLAH20	Other Contact Person	  
 Doea, Jane Bonny Race: Unknown Sex: Female			0000000139BLAH20	None Specified	  

Click the appropriate icon in the *Actions* column to add the name as an Offender, Victim, or Other Person. Hover your mouse over each icon for a description of what the icon does.



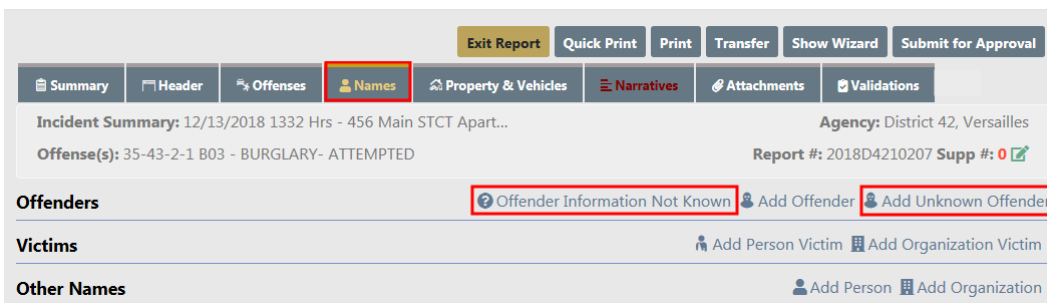
**NOTE:** A green icon suggests the Recommended Action based on the CFS Contact Type/Involvement Role. For example, if the *Add as Offender* icon is green, that is the recommended action.

**NOTE:** Names appearing as black text, lack unique person identifiers required to match to or create a new master person index record.

After clicking the appropriate icon, the **Add Person** screen appears. Fill in the appropriate information then add and select the person. When adding a new person record, the system notifies you if there are potential duplicates.

- For more information, refer to "Adding Person" on page 85.

### Offenders Section-Adding Unknown Offender(s)



- **Add Unknown Offender**

Selecting the **Add Unknown Offender** hyperlink prompts you to list the number of unknown offenders by using a drop down menu. Once the number of unknown offenders is selected, add applicable sex, race, age, and description to each. *Not Known* is also an acceptable answer.

A screenshot of the 'Add Unknown Offenders' form. At the top, it says 'Add Unknown Offenders'. Below that is a dropdown menu labeled 'SELECT # OF UNKNOWN OFFENDERS' with the number '1' selected. Underneath is a section for 'Offender # 1'. This section contains three dropdown menus: 'SEX' with '-Select-' selected, 'RACE' with '-Select-' selected, and 'APPROX. AGE' with '-Select-' selected. Below these are two text input fields: 'REMARKS' and 'DESCRIPTOR', both with '-Select-' selected. At the bottom of the form are two buttons: 'Go Back' and 'Save'.

Click **Save** to create the Offender records.

- **Offender Information Not Known**

Selecting **Offender Information Not Known** enters one *Unknown Offender* record as a place holder, allowing you to return and update the record when details are known.

Offenders <span style="float: right;">Add Offender Add Unknown Offender</span>				
Name	Age (Yrs)	Role(s)	Supp #	Actions
<a href="#">Offender Information Not Known</a>		Suspect / Offender	0	

The **Offender Information Not Known** hyperlink only appears when an Offender record is nonexistent.

### Offender Section-Adding Known Offender(s)

If the **Add Offender** hyperlink is chosen you are taken to the **Master Indices Person Search** screen.

You can select person records for the incident report three ways:

- Search by entering your own criteria, then select from the search results list.
- Create new master person record and add it to the incident report.
- Search for a person that exists on a CFS record that is associated to the incident report, if applicable, then select from the search results list. An **Associated CFS Available** link appears if the incident is associated to a CFS record.

For more information on searching, selecting, and creating *Master Person* records, refer to "Master Indices" on page 71.

**NOTE:** Always search for *Master Person* prior to adding a new record. Search as broadly as possible to yield more results, then Refine Search as necessary to narrow the search. This will help to prevent Master Indices duplicate records for the same Person, Address, etc.

Once all information has been added to the person record click the **Select** button to continue to the next screen to add additional NIBRS/UCR related information for that person.

**NOTE:** This same process is used for adding the Offender(s), Victim(s) and Other Name(s).

If you select the box indicating that the Offender was also a victim of the offense, you are asked to confirm. Select **Yes** to confirm.

Message From RMS

---

Only choose this option if this Incident Report involves a single reciprocal offense such as domestic battery / assault that involved 2 or more offenders where each offender was also the victim for the offense.

---

Select the **Save** button to return to the **Names** tab where the person will appear added to the Offender Section. If the offender was also a victim, the name is also listed under the victim section. Add additional offenders if applicable.

### Incident Victim(s)

Society crimes will default **Society** as the victim.

Persons and Organizations can be added to the Incident following the same process used to add a Known Offender. For details on adding a Known Offender refer to "Offender Section-Adding Known Offender(s)" on the previous page.

At the bottom of the screen is an optional area where you can note Victim Rights Notification information if applicable.

Click **Continue** to return to the names tab where the person added can be seen. Add Additional victims in the same manner if applicable. If no other names are needed click the **Finished – Go To Next Section** button to proceed to the **Property & Vehicles** tab.

### Adding Organization as Victim

Select the **Add Organization** hyperlink to advance to the **Master Indices Organization Search** screen. Search for the Organization they need to add to the report as a victim.

**NOTE:** Always search the Master Indices prior to adding a new record. Search as broadly as possible to yield more results then Refine Search as necessary to narrow the search. This will help to prevent duplicated records for the same Person, Address, etc. in the Master Indices.

The search results display either a list of organization names meeting the search parameters or will indicate that there were no results found.

If the desired organization is listed, you can select the existing record as the victim for the report. Best practice is to review the information by clicking on the Organization Name or Index ID to review the information and verify it is up to date prior to selecting the record for the report.

Organization Name	Organization Type	Organization #	Street #	Direction	Street Name	City	State	Zip	Index Id	Actions
Automation Incorporated	Computer Systems and Services including	911	122	West	Elm	Chicago	Illinois	60610	240000006	[Hand icon] [Link icon]
Automation Industries	Law Office	123	2740	North	ADDISON MEADOWS	INDIANAPOLIS	Pennsylvania	46203	240000007	[Hand icon] [Link icon]
Automation Solutions	Business/Personal Services	456	456	West	Livingwell	Denver	Colorado		240000014	[Hand icon] [Link icon]
Fake Org Automation	Unknown	12345							240000028	[Hand icon] [Link icon]
Mike's Auto Shop	Automotive & Service Station								4	[Hand icon] [Link icon]

If the organization does not already exist in the Master Indices, select **Add Organization** to add the new record. Enter the Organization Name and Type fields then click **Save**, or click **Save & Select** to save and add to the Incident. Add additional known information such as the organization's address, phone number, employee information, and attachments.

**Organization Information** ✓ No Duplicates Found Go Back

SECURITY LEVEL  
Level 1 - Access to all Data

ORGANIZATION NAME  
Auto Series Inc.


ORGANIZATION #  
[Empty field]

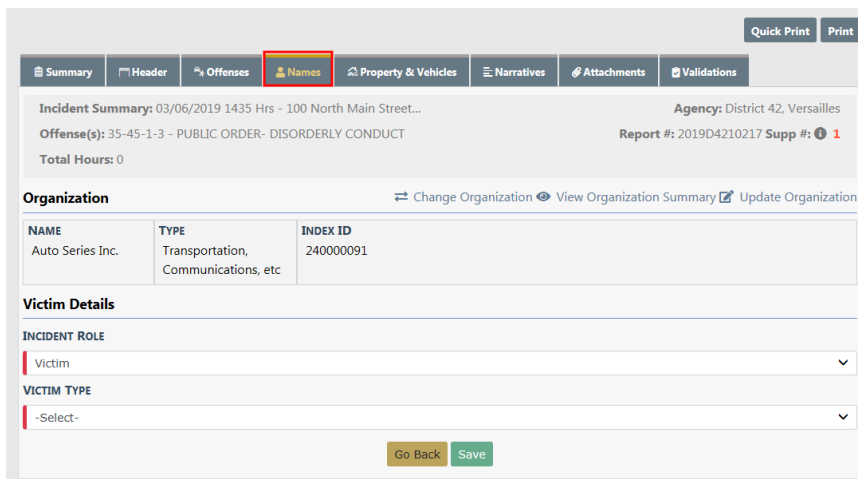
COMMENTS  
[Empty text area]

ORGANIZATION TYPE  
-Select-  
Agricultural Services/Forestry/Fishing  
Alarm Services  
Amusement & Recreational Services  
Apparel & Accessories  
Automotive & Service Station  
Automotive Rental/Services  
Building, Hardware & Garden Supplies  
Business/Personal Services  
Cleaning Services & Laundry  
Computer Systems and Services including  
Construction  
Educational Public/Private  
Financial, Insurance, etc.  
Food & Beverage

Go Back Save

With proper permissions, you can select the **Security Level**. For more information, refer to "Master Index Security" on page 72.

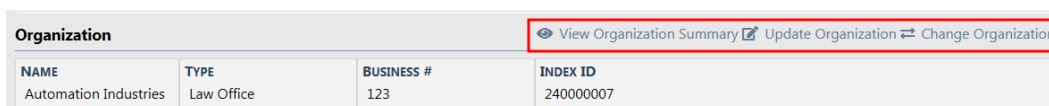
If you are selecting an organization from the search results list, click the **Select** icon  to add the organization to the report. Add additional required information regarding the organization's role, the offense(s) the organization is a victim of, and the victim type.



The screenshot shows the RMS1 interface with the following details:

- Incident Summary: 03/06/2019 1435 Hrs - 100 North Main Street...
- Agency: District 42, Versailles
- Offense(s): 35-45-1-3 - PUBLIC ORDER- DISORDERLY CONDUCT
- Report #: 2019D4210217 Supp #: 1
- Total Hours: 0
- Organization: Auto Series Inc. (Type: Transportation, Communications, etc; Index ID: 240000091)
- Victim Details: INCIDENT ROLE (Victim), VICTIM TYPE (-Select-)
- Buttons: Go Back, Save

You can, with appropriate permissions, **View Organization Summary**, **Update Organization** information, or **Change Organization** by clicking on the respective links on this screen.



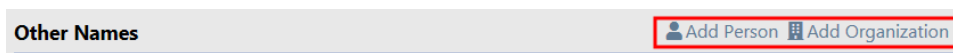
The screenshot shows the Organization section with the following details:

- Organization: Automation Industries (Type: Law Office; Business #: 123; Index ID: 240000007)
- Action links: View Organization Summary, Update Organization, Change Organization

Click the **Save** button to add to the Incident. Add additional names and organizations for the report if applicable.

### Other Names

Additional persons and organizations can be added to the report when applicable.



The screenshot shows the Other Names section with the following details:

- Buttons: Add Person, Add Organization

The entry of **Other Names** is performed using the same method as adding a Person, Organization, Victim, or Known Offender.

For more information on adding a Known Offender refer to "Offender Section-Adding Known Offender(s)" on page 189.

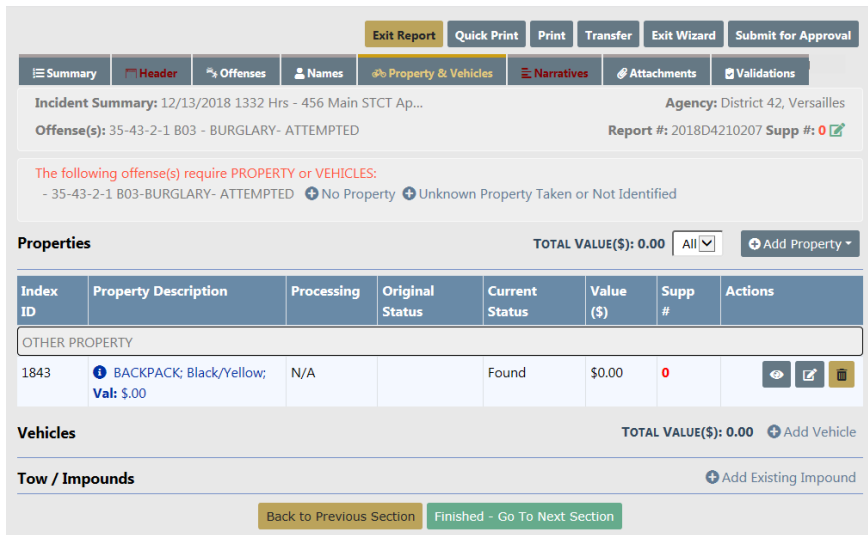
For more information on adding an Organization as a Victim refer to [#AddOrgAsVictim](#).

Select the **Finished – Go To Next Section** button to proceed to the *Property & Vehicles* tab.

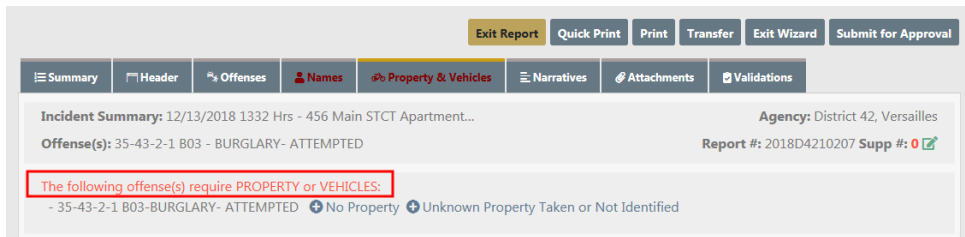


### Incident Report Section – Property & Vehicles Tab

The **Property & Vehicles Tab** contains all the incident related property and vehicles.

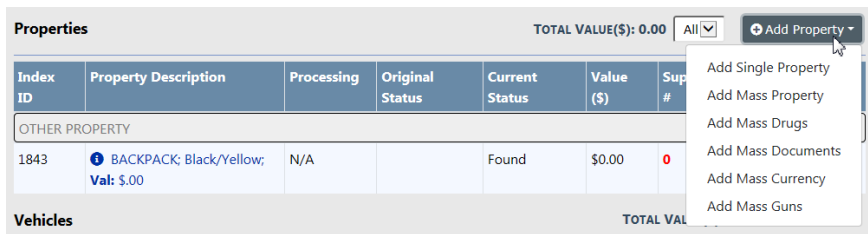


If there is an offense on the report that requires property or vehicle association to satisfy NIBRS/UCR validations, the tab will be red and there will be instructions on the page stating the requirement.



### Add Property

Click the **Add Property** button to display menu items from which to choose. You can add a single piece of property, or multiple (mass) property types listed.



There are five **Categories** for adding property: *Property, Drugs, Documents, Currency, and Guns.*

The majority of the time when dealing with a piece of property for an Incident report, the piece of property has not been dealt with by the user's agency. For this reason you are presented with the **Add Property** screen instead of a **Master Indices** search screen.

- **Add Single Property**

Click **Add Single Property** to display the *Property Information* screen. Select the **Category** to display additional fields to describe the property in more detail.

The screenshot shows the 'Property Information' form. At the top, there is a header with 'Property Information', a red instruction 'Select a Category to display additional fields', and two buttons: 'Go Back' and 'Search Properties'. Below the header, there are two main sections: 'SECURITY LEVEL' and 'CATEGORY'. The 'SECURITY LEVEL' is a dropdown menu set to 'Level 1 - Access to all Data'. The 'CATEGORY' section has five radio button options: 'PROPERTY', 'DRUGS', 'DOCUMENTS', 'CURRENCY', and 'GUNS'. A red arrow points to the 'CATEGORY' label, and another red arrow points to the 'PROPERTY' radio button. Below these are 'DATE OF INFO' (3/13/2019) and 'COMMENTS' (empty text area). At the bottom are three buttons: 'Go Back', 'Save', and 'Save & Select'.

The screenshot shows the 'Property Information' form with the 'PROPERTY' category selected. The 'CATEGORY' section now has the 'PROPERTY' radio button selected and highlighted with a red box and a red arrow. Below this, the form is divided into several sections: 'TYPE' (dropdown menu), 'SERIAL #' (text input), 'MISCELLANEOUS / OAN' (text input), and 'VALUE' (text input). Below these are 'MAKE' (text input), 'MODEL' (text input), 'PRIMARY COLOR' (dropdown menu), and 'SECONDARY COLOR' (dropdown menu). Below these are 'QUANTITY' (text input with '1') and 'ITEM DESCRIPTION' (text area). At the bottom are 'DATE OF INFO' (3/13/2019) and 'COMMENTS' (empty text area). At the bottom are three buttons: 'Go Back', 'Save', and 'Save & Select'.

**NOTE:** If you have reason to believe the piece of property you are going to enter on the report has been dealt with previously, use the **Search Properties** button to the top right, locate the existing property in the **Master Indices**, and add it to the report.

Enter necessary data, then click **Save** to save your entry, or **Save & Select** to save your entry and add it to Incident Property.

- **Add Mass Entries**

You can add multiple (mass) property types for *Property*, *Drugs*, *Documents*, *Currency*, and *Guns*. If you choose any one of the Mass options, you can add multiple property records on one screen, rather than add them one at a time.

Refer to "Mass Entry" on page 200 for details.

**NOTE:** If you are entering *Mass Currency*, currency should only be used when dealing with large amounts of currency where the denominations are known. For smaller amounts, use the *Property* category and select **Cash** from the drop-down list. For example, *\$500 stolen from a person* would be entered as *Property, Cash* and the description could state *Miscellaneous 5, 10, & 20, dollar bills*.

Enter the property information in the fields provided then click **Save** to display *Additional Information*.

You have the ability to process the property as **Evidence**, **Lost & Found**, or **None** (neither), providing your agency elected to turn on these modules.

**Additional Information**

Only associate a piece of property to an offense if that property was a 'target' or incurred a loss resulting from that offense (i.e., the property was Stolen & Recovered, Burned, Counterfeited/Forged, Destroyed/Damaged/Vandalized, or for drug seizures) ⓘ

OFFENSE(S) [SELECT ALL] [SELECT NONE]

⊗ ⚠ BURGLARY- ATTEMPTED

CURRENT STATUS

Found ▾

PROPERTY OWNER STOLEN/DAMAGED/RECOVERED VALUE(\$)

-Select- ▾ 0

PROPERTY DAMAGE

PROPERTY DAMAGED DESCRIPTION

ADDITIONAL PROCESSING?

NONE  EVIDENCE  LOST & FOUND

Go Back
Save
Save + Add Another Property

If you choose **Evidence** or **Lost & Found**, a data entry screen appears with data specific to the option you choose. You must also select a **Current Status** from the drop-down list.

### Lost & Found

The *Add Lost & Found Entry* screen appears after selecting the **Lost & Found** button.

Add Lost & Found Entry

<b>FOUND BY</b>	<b>FOUND DATE/TIME</b>	<b>CUSTODY DATE/TIME</b>
<input type="text"/>	<input type="text" value=""/>	<input type="text" value="03/13/2019 1006"/>

**COMMENTS**

**SELECT DESTINATION**

Location  Person

**SELECT A LOCATION**

**CUSTODY COMMENTS**

Enter the necessary information then click **Save**.

The newly entered **Lost & Found** information appears near the bottom of the *Additional Information* screen. If necessary, click on the **Edit** link to update the record.

Click **Save + Add Another Property** to save the new entry and add another property record, or click **Save + Continue** to save the new entry and display the property records.

**NOTE:** For information on the *Lost & Found Module*, refer to "Lost and Found Property" on page 657.

## Evidence

For Evidence, select the **Evidence** button then click **Save** to display an evidence confirmation.

Message From RMS

You have selected to add this property as evidence. Select Yes to enter evidence details.

Selecting the **Yes** button displays the **Add Evidence** screen to enter the date and time of recovery, the location the evidence is being stored, description, comments, an extended chain of custody and if the evidence needs any testing. The status defaults to *Pending Check-in* and the Location list of values (LOV) will have the temporary storage locations specific to the user's agency.

**Property Information**
Go Back

PROPERTY TYPE	SERIAL NUMBER	PROPERTY DESCRIPTION
SEEDS		

**Incident Summary:** 12/13/2018 1332 Hrs - 456 Main STCT... **Agency:** District 42, Versailles

**Offense(s):** 35-43-2-1 B03 - BURGLARY- ATTEMPTED **Report #:** 2018D4210207 **Supp #:** 0

**Evidence Information**

<b>DATE/TIME RECOVERED</b> 02/15/2019 1020	<b>RECOVERY LOCATION</b> [Empty Field]	<b>AGENCY</b> District 42, Versailles
<b>DATE/TIME PLACED IN STORAGE</b> 02/15/2019 1210	<b>STATUS</b> Pending Check-In	<b>LOCATION</b> Drawer
<b>CUSTODY FROM</b> Saur, Christine, ID# SAUR111	<b>ITEM #</b> 1	

**EVIDENCE DESCRIPTION**  
[Empty Field]

**EVIDENCE COMMENTS**  
[Empty Field]

**Extended Chain of Custody**
Click to enter Extended Chain of Custody →
Add

**Evidence Processing**

Signature

Go Back Save

An **Extended Chain of Custody** can be entered to show if a piece of evidence was collected and transferred prior to entering the evidence. This can be done for multiple transfers if necessary. The **Custody From** and **Custody To** fields are tied to system users; however, you can leave one or both of these fields blank then add the data to comments.

**Extended Chain of Custody**
Add

<b>CUSTODY FROM</b> [Empty Field]	<b>CUSTODY TO</b> [Empty Field]
<b>DATE/TIME</b> 03/13/2019 1011	<b>LOCATION</b> -Select-
<b>COMMENTS</b> [Empty Field]	

Signature

**NOTE:** In a multi-tiered agency the *Location* list filters based on the selected agency.

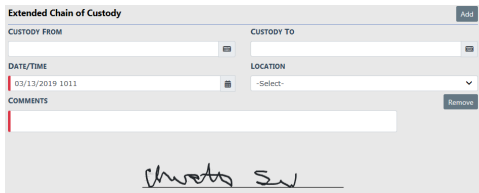
Select the **Signature** button to open the signature window.

Please Use Mouse to Enter Signature

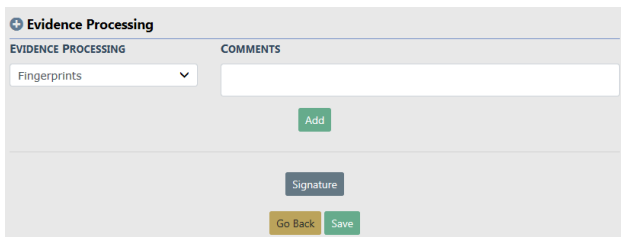
\_\_\_\_\_

Cancel
Reset
Submit

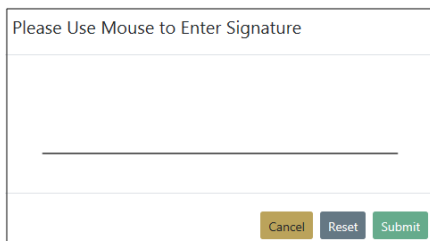
Sign for the custody change using the mouse then select **Submit** to apply the signature.



**Evidence Processing** can also be noted when entering a piece of evidence. Specific notes may be entered to relay specific information about the request. Multiple processing requests can be entered for a single piece of evidence.



Select the **Signature** button to open the signature window.



Sign for the evidence processing using the mouse then select **Submit** to apply the signature.



Select the **Save** button to add the item to the evidence database.

ADDITIONAL PROCESSING?  
 NONE  EVIDENCE

**Evidence Information**

SYSTEM EVIDENCE ID	ITEM NUMBER	DATE/TIME	INITIAL/TEMPORARY STORAGE LOCATION
789	2	02/15/2019 1020	Drawer

EVIDENCE COMMENTS      EVIDENCE DESCRIPTION      SEIZING OFFICER  
Saur, Christine, ID# SAUR111

[Go Back](#) [Save](#) [Save + Add Another Property](#)

After completing the evidence screen, you are returned to the **Property & Vehicles** screen. Either click the **Save** button or the **Save + Add Another Property** button.

**NOTE:** If you do not select one of the two save buttons, evidence will not save correctly to the report. If you click another incident tab, it will be listed in the evidence database and associated with the System Evidence Id but will not be attached to the incident report. It will be attached to the report as a piece of property in the report but not as evidence in the report.

You can now **Print Evidence Labels, Receipts, or Chain of Custody** from the current screen, or print at a later time.

**NOTE:** For more information on printing *Evidence Labels, Receipts, or Chain of Custody* refer to "Incident Report – Print Evidence Labels, Receipts, Chain of Custody" on page 206.

[Exit Report](#) [Quick Print](#) [Print](#) [Transfer](#) [Exit Wizard](#) [Submit for Approval](#)

[Summary](#) [Header](#) [Offenses](#) [Names](#) [Property & Vehicles](#) [Narratives](#) [Attachments](#)

[Validations](#)

Incident Summary: 12/13/2018 1332 Hrs - 456 Main ST... Agency: District 42, Versailles  
Offense(s): 35-43-2-1 B03 - BURGLARY- ATTEMPTED Report #: 2018D4210207 Supp #: 0

The following offense(s) require PROPERTY or VEHICLES:  
- 35-43-2-1 B03-BURGLARY- ATTEMPTED No Property Unknown Property Taken or Not Identified

**Properties** TOTAL VALUE(\$): 0.00 [Print Evidence](#) [Add Property](#)

Index ID	Property Description	Processing	Original Status	Current Status	Value (\$)	Supp #	Actions
OTHER PROPERTY							
1843	BACKPACK; Black/Yellow; Val: \$,00	Evidence - Item # 1			\$0.00	0	

**Vehicles** TOTAL VALUE(\$): 0.00 [Add Vehicle](#)

**Tow / Impounds** [Add Existing Impound](#)

[Back to Previous Section](#) [Finished - Go To Next Section](#)

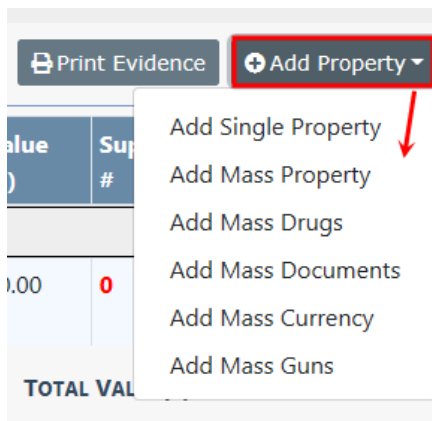
Select the **Finished – Go To Next Section** button to proceed to the next tab.

**NOTE:** A warning message displays to unauthorized users who attempt to remove *Property* from the **Incident Report** that is processed as *Evidence*.

**NOTE:** For information on the *Evidence Module*, refer to "Evidence Module" on page 419.

### **Mass Entry**

All five property **Categories** support **Mass Entry**, a form that allows you to enter multiple property records on the same screen. Click on the **Add Property** button to display a list of **Categories** from which to choose.



Select a mass category from the list to open the associated Mass Entry form. *Add Mass Drugs* is used in the example.



Enter the first row in the fields provided.

There are two ways to add additional fields: Click the **Add** button to add one row at a time. To add multiple rows at one time, enter the number of rows you want to add in the box on the left of the **Add More Rows** button, then click the **Add More Rows** button.

Select a radio button to the far right of each line item to indicate how to process it: *Evidence*, *Lost & Found*, or *None*. You may need to slide the bar to the right to see the radio buttons.

When all the required information and other known information have been entered, click the **Save** button. A confirmation window appears listing the number of mass records entered and how they are processed. Click **Yes** to create the records.

A window appears displaying the new entries with *Evidence* and *Lost & Found* separated into tabs.

Incident Summary: 12/13/2018 1332 Hrs - 456 Main STCT Apa... Agency: District 42, Versailles  
Offense(s): 35-43-2-1 B03 - BURGLARY- ATTEMPTED Report #: 2018D4210207 Supp #: 0

Evidence Lost & Found **Tabs**

Agency	Date of Recovery	Recovery Location	Date Placed in Storage
District 42, Versailles	02/15/2019 1020		02/15/2019 1210


Type: DRUGS / NARCOTICS - CONTROLLED SUBSTANCE Drug: SUSPECTED MORPHINE Quantity: 0

Signature

Go Back Save

Fill in all the required fields in each tab. Any field with a red left-hand border is a required field. You must complete required fields to continue. Click **Signature** to sign if required by your agency.

Click **Save** to add to the Incident Report.

Click the Edit icon  on the applicable properties to relate them to the report. Then choose all offenses or none.

Exit Report Quick Print Print Transfer Exit Wizard Submit for Approval

Summary Header % Offenses Names **Property & Vehicles** Narratives Attachments Validations

Incident Summary: 12/13/2018 1332 Hrs - 456 Main STCT Apartment #100 Littl... Agency: District 42, Versailles  
Offense(s): 35-43-2-1 B03 - BURGLARY- ATTEMPTED Report #: 2018D4210207 Supp #: 0

The following offense(s) require PROPERTY or VEHICLES:  
- 35-43-2-1 B03-BURGLARY- ATTEMPTED No Property Unknown Property Taken or Not Identified

Properties TOTAL VALUE(\$): 0.00 All Print Evidence Add Property

Index ID	Property Description	Processing	Original Status	Current Status	Value (\$)	Supp #	Actions
OTHER PROPERTY							
1847	PLANT; Drug Type: SUSPECTED MARIJUANA; 0.000	Lost & Found			\$0.00	0	
1846	DRUGS - COMMON MEDICINE; Drug Type: SUSPECTED OTHER DEPRESSANTS; 0.000	Evidence			\$0.00	0	
1845	SEEDS; Drug Type: SUSPECTED MARIJUANA; 0.000	Evidence			\$0.00	0	
1843	BACKPACK; Black/Yellow; Val: \$.00	Evidence - Item # 1			\$0.00	0	

Vehicles TOTAL VALUE(\$): 0.00 Add Vehicle

Tow / Impounds Add Existing Impound

Back to Previous Section Finished - Go To Next Section

Quick Print Print

Summary Header % Offenses Names **Property & Vehicles** Narratives Attachments Validations

Incident Summary: 12/13/2018 1332 Hrs - 456 Main STCT Apartment #100 Littl... Agency: District 42, Versailles  
Offense(s): 35-43-2-1 B03 - BURGLARY- ATTEMPTED Report #: 2018D4210207 Supp #: 0

Property View Property Details Update Details Change Property

TYPE	DRUG	QUANTITY	VALUE(\$)	DATE OF INFO	INDEX ID
DRUGS - COMMON MEDICINE	SUSPECTED OTHER DEPRESSANTS	0	0	02/15/2019	1846

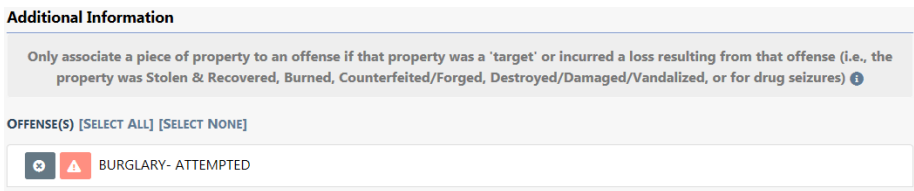
Additional Information

Only associate a piece of property to an offense if that property was a 'target' or incurred a loss resulting from that offense (i.e., the property was Stolen & Recovered, Burned, Counterfeited/Forged, Destroyed/Damaged/Vandalized, or for drug seizures)

OFFENSE(S) **SELECT ALL** **SELECT NONE** Choose either all or none

BURGLARY- ATTEMPTED

When an offense on the report requires a property or vehicle association, validations are in red advising of the requirement. Make note of the instructions indicating what property should be associated to what types of offenses. Hovering over the blue information bubble will provide examples.

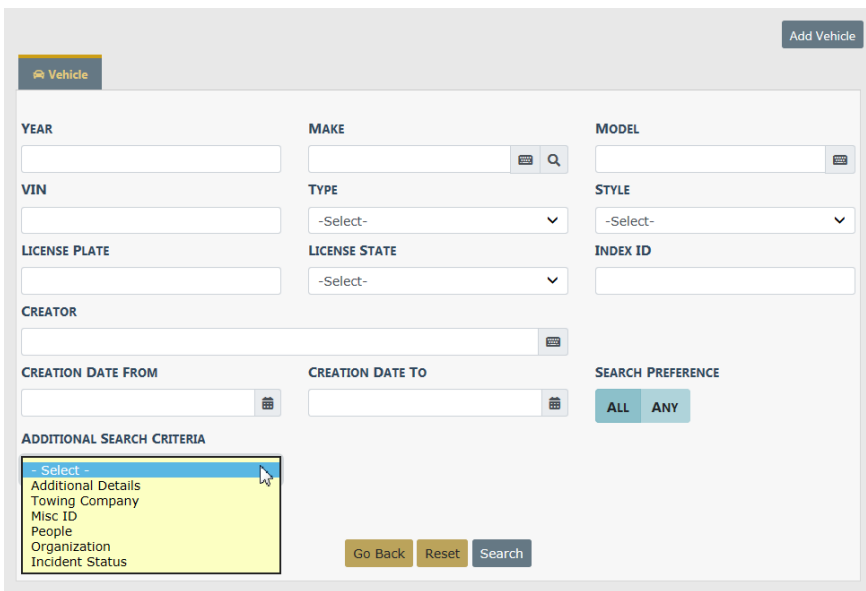


If the property being added needs to be tracked as **Evidence**, select **Yes** at the bottom of the screen answering the question, *Was Property confiscated and placed into evidence?* and follow the prompts. (see Incident Report – Incident Evidence for more information).

Select the **Save & Add another Property** button to add additional property or **Save & Continue** button to return to the **Property & Vehicles** tab for review.

### Add Vehicle

Selecting the **Add Vehicle** hyperlink will display the **Search Vehicle** screen.



**NOTE:** Always search the Master Indices prior to adding a new record. Search as broadly as possible to yield more results and Refine Search as necessary to narrow the search. This helps to prevent duplicated records for the same Person, Address, Vehicles, etc. in the Master Indices, and it keeps all RMS system activities related to the record in a centralized location.

The search results display either a list of records matching the search parameters or will indicate that there were no results found. If the desired record is listed you can select the existing record as the victim for the report. Best practice is to review the information by clicking on the VIN or Index ID to review the information and verify it is up to date prior to selecting the record for the report.

YEAR	VIN	MAKE	MODEL	TYPE	STYLE
2013	123	ASTON - MARTON(ASTO)	VANTAGE	Automobile / Passenger	Convertible

LICENSE PLATE	LICENSE STATE	LICENSE TYPE	LICENSE MONTH / YEAR	COLOR	DATE OF INFO
AUTOMATION2	NC	Judge/Justice (State/Fed.)	12 / 2012	BLU / BLU	03/20/2014 12:12:08 PM

INDEX ID: 110

**Additional Information**

Only associate a piece of property to an offense if that property was a 'target' or incurred a loss resulting from that offense (i.e., the property was Stolen & Recovered, Burned, Counterfeited/Forged, Destroyed/Damaged/Vandalized, or for drug seizures)

OFFENSE(S) [SELECT ALL] [SELECT NONE]

BURGLARY - ATTEMPTED

INCIDENT VEHICLE ROLE: -Select- STATUS: -Select-

VEHICLE OWNER: -Select-

STOLEN/DAMAGED/RECOVERED VALUE(S): LOCKED: KEYS IN VEHICLE:

VEHICLE DAMAGE:

REMARKS:

Go Back Save Save + Add Another Vehicle

When an offense on the report requires a property or vehicle association, validations appear in red advising of the requirement. Make note of the instructions indicating what property should be associated to what types of offenses. Hovering over the blue information bubble will provide examples.

Only associate a piece of property to an offense if that property was a 'target' or incurred a loss resulting from that offense (i.e., the property was Stolen & Recovered, Burned, Counterfeited/Forged, Destroyed/Damaged/Vandalized, or for drug seizures)

Click to select/unselect the offense

OFFENSE(S) [SELECT ALL] [SELECT NONE]

BURGLARY - APARTMENT COMPLEX

Indicates this offense requires at least one property

INCIDENT VEHICLE ROLE STATUS

### Crime Not Selected/ Associated

OFFENSE(S) [SELECT ALL] [SELECT NONE]

BURGLARY - ATTEMPTED

INCIDENT VEHICLE ROLE STATUS

### Crime Selected/Associated

Once all this information is completed select either the **Save & Add another Vehicle** button to add more property or the **Save & Continue** button to return to the **Property & Vehicles** tab for review.

Once all Property & Vehicle have been added, select the **Finished – Go to Next Section** to advance to the **Narrative** tab.


### Add Existing Impound

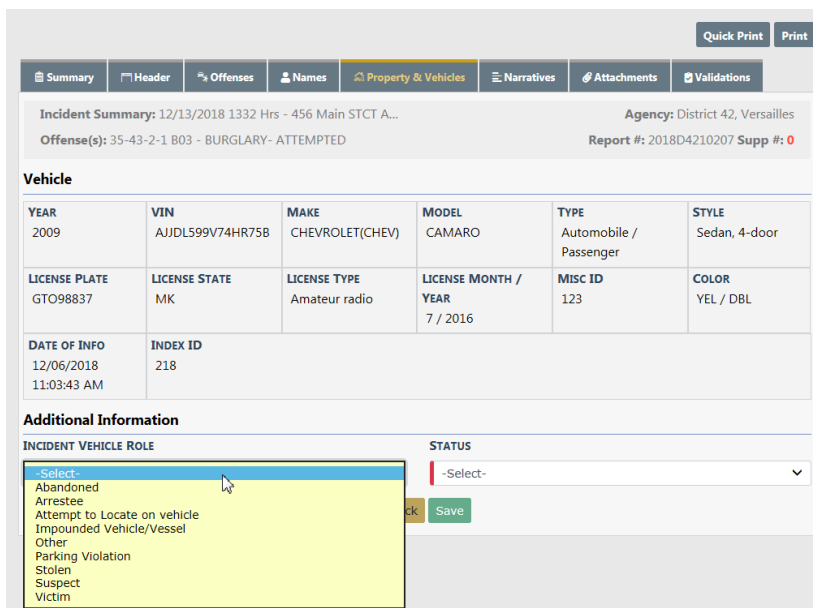
Vehicle Tow/Impound can be associated with an Incident. However, the Tow/Impound grid will not appear on the Incident screens is the Agency is not using the Tow/Impound module.

Selecting the **Add Existing Impound** hyperlink displays the **Vehicle Tow/Impound Search** screen.

Enter the necessary data to search for the record needed, then click the **Search** button to view the results.

Impound Id	Vehicle Id	Towing Agency	Tow Date	Towed From	Approval Status	Actions
203	765	District 42, Versailles	01/31/2019 09:39	DENVER	Initial	[edit] [delete] [print]

Click the **Select** icon  to select the record and to open the **Associate Incident to Vehicle Tow/Impound** page.



Quick Print Print

Summary Header Offenses Names **Property & Vehicles** Narratives Attachments Validations

Incident Summary: 12/13/2018 1332 Hrs - 456 Main STCT A... Agency: District 42, Versailles  
Offense(s): 35-43-2-1 B03 - BURGLARY- ATTEMPTED Report #: 2018D4210207 Supp #: 0

**Vehicle**

YEAR	VIN	MAKE	MODEL	TYPE	STYLE
2009	AJJDLS99V74HR75B	CHEVROLET(CHEV)	CAMARO	Automobile / Passenger	Sedan, 4-door
LICENSE PLATE	LICENSE STATE	LICENSE TYPE	LICENSE MONTH / YEAR	MISC ID	COLOR
GTO98837	MK	Amateur radio	7 / 2016	123	YEL / DBL
DATE OF INFO	INDEX ID				
12/06/2018 11:03:43 AM	218				

**Additional Information**

INCIDENT VEHICLE ROLE STATUS

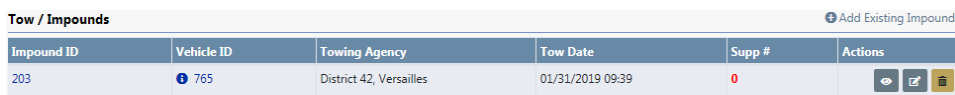
-Select-  
-Select-

Save




- Select
- Abandoned
- Arrestee
- Attempt to Locate on vehicle
- Impounded Vehicle/Vessel
- Other
- Parking Violation
- Stolen
- Suspect
- Victim

Select the proper **Incident Vehicle Role** and **Status** from the lists, then click the **Save** button.

The Tow/Impound record is now associated to the Incident.



⊕ Add Existing Impound

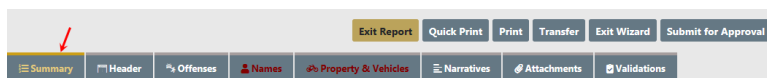
Impound ID	Vehicle ID	Towing Agency	Tow Date	Supp #	Actions
203	765	District 42, Versailles	01/31/2019 09:39	0	  

### Incident Report – Print Evidence Labels, Receipts, Chain of Custody

After all the property and evidence have been entered you can review the property and/or evidence entered on the report. If evidence exists, you have the ability to print **Evidence Labels, Evidence Receipts, and Chain of Custody**.

There are two access points to print labels, receipts, and chain of custody:

- The **Summary** tab of the Incident Report, then scroll down to the **Property** section.



Properties							
Index ID	Property Description	Processing	Original Status	Current Status	Value (\$)	Supp #	Actions
OTHER PROPERTY							
1843	BACKPACK; Black/Yellow; Val: \$,00	N/A		Found	\$0.00	0	

**Vehicles** TOTAL VALUE(\$): 0.00

- The **Property and Vehicles** tab of the Incident Report.

Exit Report Quick Print Print Transfer Exit Wizard Submit for Approval

Summary Header % Offenses Names **Property & Vehicles** Narratives Attachments Validations

Incident Summary: 12/13/2018 1332 Hrs - 456 Main STCT Apa... Agency: District 42, Versailles  
 Offense(s): 35-43-2-1 B03 - BURGLARY- ATTEMPTED Report #: 2018D4210207 Supp #: 0

The following offense(s) require PROPERTY or VEHICLES:  
 - 35-43-2-1 B03-BURGLARY- ATTEMPTED Unknown Property Taken or Not Identified

Properties							
Index ID	Property Description	Processing	Original Status	Current Status	Value (\$)	Supp #	Actions
OTHER PROPERTY							
1847	PLANT; Drug Type: SUSPECTED MARIJUANA; 0.000	Lost & Found			\$0.00	0	
1846	DRUGS - COMMON MEDICINE; Drug Type: SUSPECTED OTHER DEPRESSANTS; 0.000	Evidence			\$0.00	0	

Select **Print Evidence** button from either tab and a new Reports window displays.

Incident Properties Reports

Property	
<input checked="" type="checkbox"/>	Evidence Id: 789; Property Id: 1845 - Seeds
<input checked="" type="checkbox"/>	Evidence Id: 788; Property Id: 1843 - Backpack
<input type="checkbox"/>	Evidence Id: 790; Property Id: 1846 - Drugs - Common Medicine

Cancel Print Labels Print Receipt Report Print Chain Of Custody Report

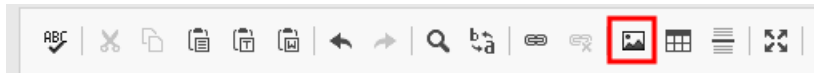
Select which properties to include, then select one of the available print buttons. **Print Labels** is used in this example. The PDF generates and is sent to your download folder. Click **Open** to view the report or click **Save**.

**NOTE:** Only items that are checked print.

## Incident Report Section – Narrative Tab

While on the **Narrative** tab, click on the **Add Narrative** button to open the Narrative entry screen where there is a built-in editor with formatting tools that supports grammar and spell checking, and provides the ability to format the body of the narrative.

When inserting an image, you must use the **Image** icon on the tool bar.

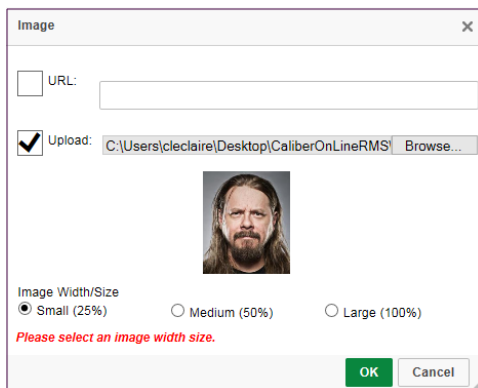


A dialog window appears giving you the option to insert an image from a URL or file.

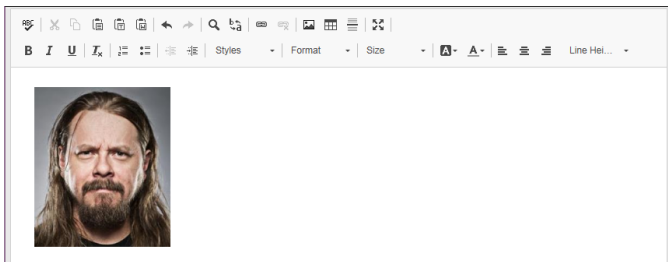
**Note:** You cannot drag and drop, or copy and paste images at this time. You must use the **Image** icon to insert.

Select **URL** or **Upload**, select the **Image Size**, then click **OK**.





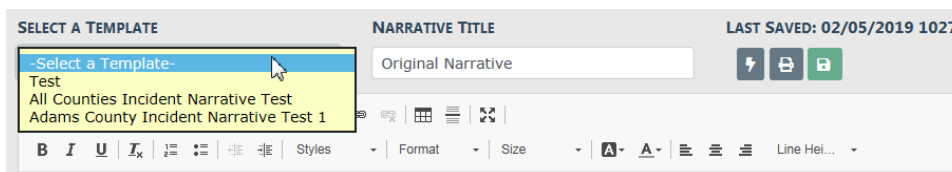
The image inserts into the body of the narrative.



To *remove the image* from the body of the narrative, click on the image then press the **Delete** key on your keyboard.

The built-in *Spelling and Grammar Checker* identifies mistakes and corrects them as you type your narrative.

Some agencies may use **Narrative Templates** to guide you in creating their narrative. If a template is selected, the information will be applied to the narrative for you to complete and edit as required.



The **Narrative Title** will default to *Original Narrative* but you may edit the title if necessary.

Select **Associated People** to associate the Incident persons to the Narrative. Select as many that apply.

There are icons for printing the narrative and for saving the narrative which can be used at any time while the narrative editor is open.




As the narrative is being typed, the system auto-saves the narrative every sixty seconds in the event the connection is lost or the computer becomes unusable.

If the application attempts to save and is not able to reach the server, you are presented with a Warning indicating the connection may be lost. Navigating away from this screen may cause you to lose up to 60 seconds worth of your narrative. Simply reestablish your connection and select the **Click Here to Try Again** link so the narrative can be saved to the server and continue the auto save feature.

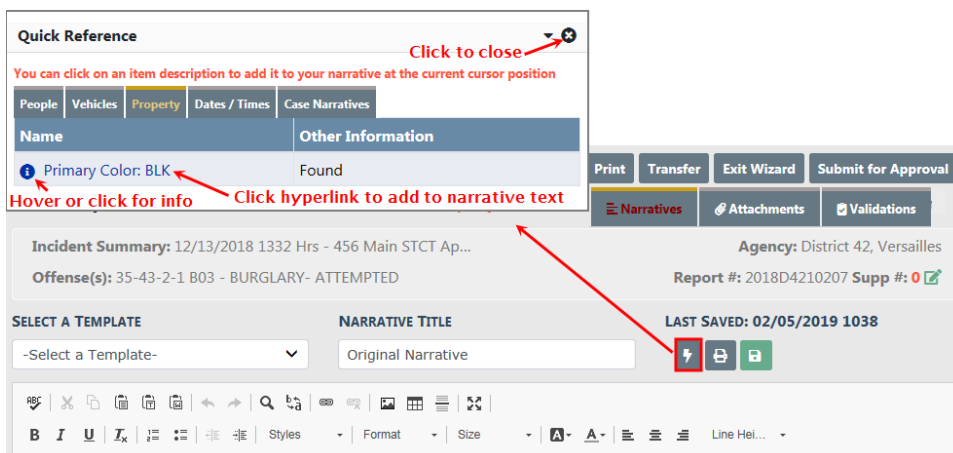
You should only have one workstation logged in to Online RMS at any given time.

If you have two workstations open on the Narrative screen, the first session open to the Narrative page is saved in Online RMS. If you write a lengthy narrative on the second open session, it does not save on your report.

**Note:** Always **Save and Exit** your Narrative when leaving the computer for any length of time, or move to a different computer to complete your report.

The **Quick Reference** icon  is a hyperlink that displays a window in the upper left hand corner which provides easy access to all the people, organizations, vehicles and property, and case narratives within the incident report.

**Note:** If no items exist for a particular tab, that tab does not appear. For example, if a Case Narrative does not exist with an associated Case, then the Case Narrative tab does not appear.



The **Quick Reference** window contains blue hyperlinks. By clicking on the blue hyperlink you add that particular information directly into your report's narrative in the area where your cursor is located.

You may also place your mouse over the blue information bubbles to see additional information.

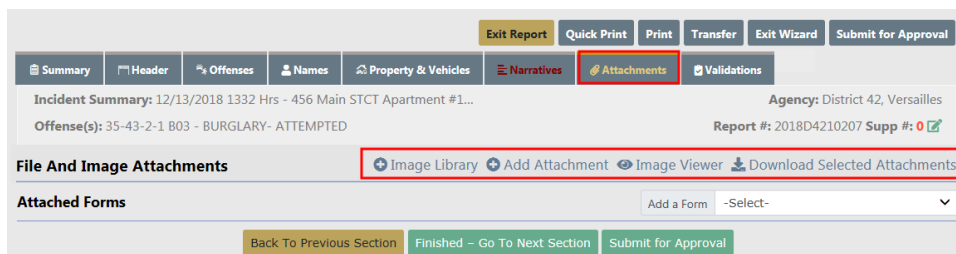
Once the narrative has been completed you can select the **Save & Continue** button which will display the **Narrative** tab for review. Additional narratives may be added to the report by selecting the **Add Narrative** link to the top right which will open a new narrative entry screen.

**NOTE:** If the agency is configured to bring over notes from CAD, you will see those narratives listed. You can view, edit, or delete the existing narrative as needed. A new narrative can be added by selecting the **Add Narrative** link.

When you have completed the narrative(s) for the report, select the **Finished - Go To Next Section** button to navigate to the **Attachments** tab.

### Incident Report Section – Attachments Tab

The **Attachments** tab is used to capture incident related attachments such as crime scene photographs or statements, and you can download existing attachments. This is also the location where *Custom Forms* can be completed if the agency is using them.



To add a file or image as an attachment, select the **Add Attachment** hyperlink. For more information on adding and downloading attachments, refer to "Attachments" on page 59.

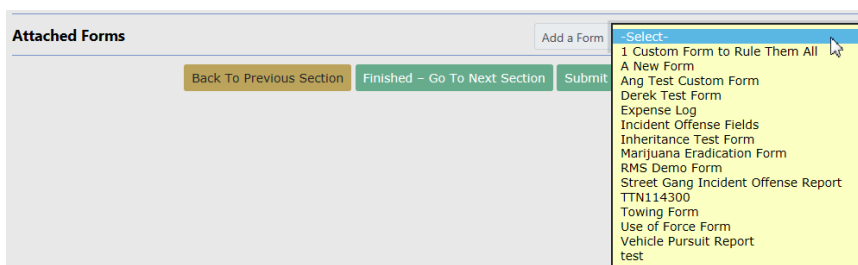
To add an image file from your personal Image Library, select the **Image Library** hyperlink. If images do not exist in your Image Library, then the hyperlink does not appear. For more information on the Image Library, refer to "Image Library" on page 65.

To view an image, select the **Image Viewer** hyperlink.

When all attachments are saved and closed the system returns to the **Attachments** Tab where the files will be displayed.

There are icons next to each file in the *Actions* column that allows you to download, view, edit, and delete the file.

Agency Forms can also be completed in the attachments section of the incident report. Select and complete the form from the drop-down menu. Refer to your administrator for details.



Select the **Finished - Go To Next Section** button to advance to the **Validations** Tab.

### ***Incident Report Section – Validations Tab***

The **Validations Tab** allows a final check of your report to ensure the minimum requirements are met based on the offense(s) entered on the report. The validation check occurs automatically when navigating to the **Validations** tab. The validation process verifies all the minimum requirements are met, then lists information still required for the report along with a hyperlink to that section of the report

The screenshot shows the 'Validations' tab of an incident report. At the top, there are buttons for 'Exit Report', 'Quick Print', 'Print', 'Transfer', 'Exit Wizard', and 'Submit for Approval'. Below these are tabs for 'Summary', 'Header', 'Offenses', 'Names', 'Property & Vehicles', 'Narratives', 'Attachments', and 'Validations' (which is highlighted). The incident summary is: '04/30/2018 1353 Hrs - 400 Elm Street Fortville, IN...' with agency 'District 42, Versailles'. The offense is '35-42-2-1 B05 - BATTERY- KNIFE'. The report number is '2018-04-120-000011' and there are 0 suppressions.

**Verify Incident Report**

Online RMS has found errors on the incident report which require attention before the report may be submitted. You may use the links below to help guide you to the particular area of the report needing modification. Once all of the errors have been resolved, you may submit the report for approval.

Selected Incident Types	Incident Types are required for incidents from this agency.
Incident Summary	Incident report requires a Media/Crime Summary.
Add Incident Location and NIBRS City	Incident Location, NIBRS City is Required.
35-43-4-2 T02 - THEFT- AIR CONDITIONER/FAN	Offense requires Property details.
35-43-4-2 T02 - THEFT- AIR CONDITIONER/FAN	Offense Status Date cannot be prior to Incident Report Occurrence date or a date in the future.
Brown Charlie Snoops Race:White SEX:Male Age:45 Years Old	Victim Offense Details Required

**Verify Incident Warnings**

Audit warnings represent data situations that are commonly flagged by IBR authorities as uncommon or overly used that should be evaluated by the agency prior to submission. The goal of this process is to ensure the quality and accuracy of data submitted to the IBR authority. Corrections are NOT required for approval.

Type	Message
NIBRS	Incident contains a Hate Bias Motivation. Please verify that Hate/Bias was a factor in the incident.

Click on each hyperlink in blue to correct the errors. After each correction, click **Save**, **Continue**, or **Update** (the button differs on each form) to return to the Validations page, or click **Return to Incident Validation** to return without saving.

A message appears in the **Incident Validations** tab when the report passes all validations.

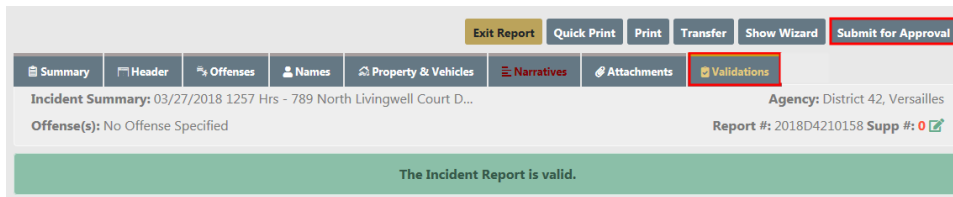
The screenshot shows the 'Validations' tab of an incident report. At the top, there are buttons for 'Exit Report', 'Quick Print', 'Print', 'Transfer', 'Exit Wizard', and 'Submit for Approval'. Below these are tabs for 'Summary', 'Header', 'Offenses', 'Names', 'Property & Vehicles', 'Narratives', 'Attachments', and 'Validations' (which is highlighted). The incident summary is: '03/27/2018 1257 Hrs - 789 North Livingwell Court D...' with agency 'District 42, Versailles'. The offense is 'No Offense Specified'. The report number is '2018D4210158' and there are 0 suppressions.

The Incident Report is valid.

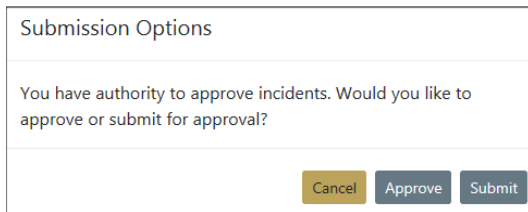
Once the report is valid, submit it for approval. For more information on submitting for approval, refer to "Incident Report – Submit For Approval" below.

### Incident Report – Submit For Approval

When the report passes all validations, it is ready for approval submission. Submit the report for approval by selecting the **Submit for Approval** button located at the far right hand of the screen just above the tabs.



Users with approval authority will receive a message to either approve or submit the request.

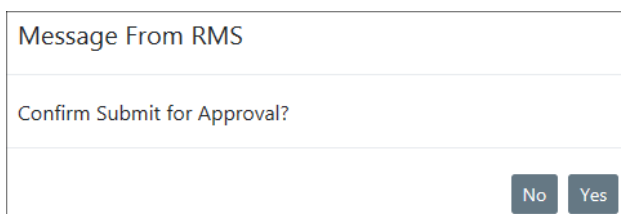


By selecting the **Submit** button, the **Submission** screen appears. The *Approving Agency* defaults to your home agency and the *Approving Group* defaults to the *Approving Supervisor*. A text box is provided to supply additional information for the *Approving Supervisor*. Select the **Submit** button for submission.



**NOTE:** Only a multi-tiered agency user will have the added ability of selecting the *Approving Agency* to direct the report for approval to the agency where the report was taken.

Select **Yes** to submit for approval.



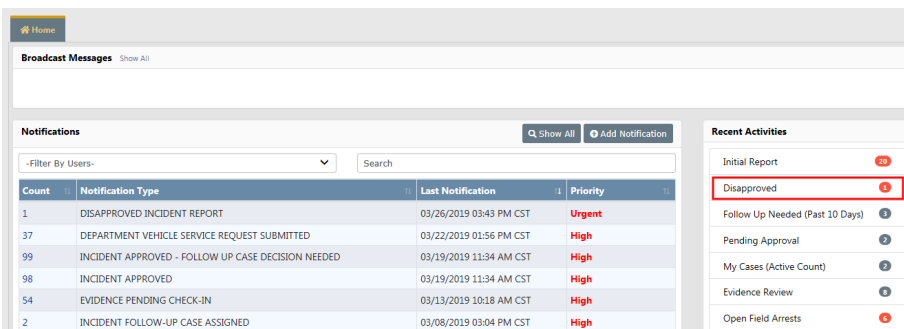
The *Approving Supervisor* receives notification that the Incident Report needs approval. For more information about the approval process refer to "Approve/Disapprove Incident Report" on page 353.

There may be times when the *Approving Supervisor* **disapproves** the Incident Report and routes it back to you for more information or to make corrections. After making corrections, you have an opportunity to resubmit for approval. For more information, refer to "Incident Report – Disapproval Notice Corrections" below.

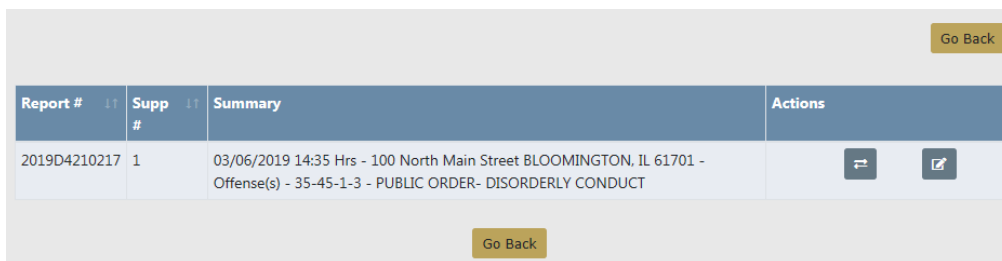
### Incident Report – Disapproval Notice Corrections



The *Approving Supervisor* may **disapprove** the Incident Report and route it back to you for more information or to make corrections. You will then have an opportunity to make the necessary corrections and resubmit for approval.

The Recent Activities section of your Home page displays those that have been disapproved.



Click the **Disapproved** link to display a list. The number of incidents that appear in the list match the disapproved number that displays in Recent Activities.



Click the transfer icon  to transfer the incident to another user, or click the edit icon  to make changes to the incident.

The *Incident Report* opens if you chose to edit. Click the red **Disapproval Comments** button to view the *Approving Supervisor* comments, or mouse over tabs highlighted in red to view disapproval comments associated with that tab.

The screenshot shows the Incident Report interface. At the top, there are buttons for 'Exit Report', 'Quick Print', 'Print', 'Transfer', and 'Submit for Approval'. Below these are navigation tabs: 'Summary', 'Header', 'Offenses', 'Names', 'Property & Vehicles', 'Narratives', 'Attachments', and 'Validations'. The 'Summary' tab is active. The incident details include: 'Incident Summary: 03/06/2019 1435 Hrs - 100 North Main Stree...', 'Agency: District 42, Versailles', 'Offense(s): 35-45-1-3 - PUBLIC ORDER- DISORDERLY CONDUCT', 'Report #: 2019D4210217', 'Supp #: 1', and 'Total Hours: 0'. A red button labeled 'Disapproval Comments' is highlighted, with a red arrow pointing to it and the text 'Click to view Approving Supervisor comments'. Below this are 'Actions' and status indicators: '1 Pending Approval' and '1 Disapproved Report'. The 'Report Header' section contains a table with columns 'REPORT ID', 'REPORT SECURITY', and 'REPORT TYPES'. Below this is a 'SUMMARY' section with the text 'Loud music at 2am.' and a table with columns 'REPORT DATE', 'OCCURRENCE DATE START', and 'OCCURRENCE DATE END'. Other sections include 'ISP', 'GANG INVOLVED', 'Alcohol Involved Info', and 'Additional Information'.

The screenshot shows the 'Offenses' tab in the Incident Report interface. A tooltip is visible over the 'Offenses' tab, containing the text 'Enter an offense to show PC for the stop.' The background shows the incident details for '03/06/2019 1200 Hrs - 17140 West Wortham Road Saucier, W...' and the offense 'DRIVING WHILE INTOXICATED - 49.04 : MB'. Buttons for 'Exit Report' and 'Quick Print' are visible at the top.

Review the supervisor comments and check the **Acknowledged** box. Add **Response Comments**, if any, then click **Save** to return to the *Incident Report* page.

The screenshot shows the 'View Comments' dialog box. It contains a table with the following data:

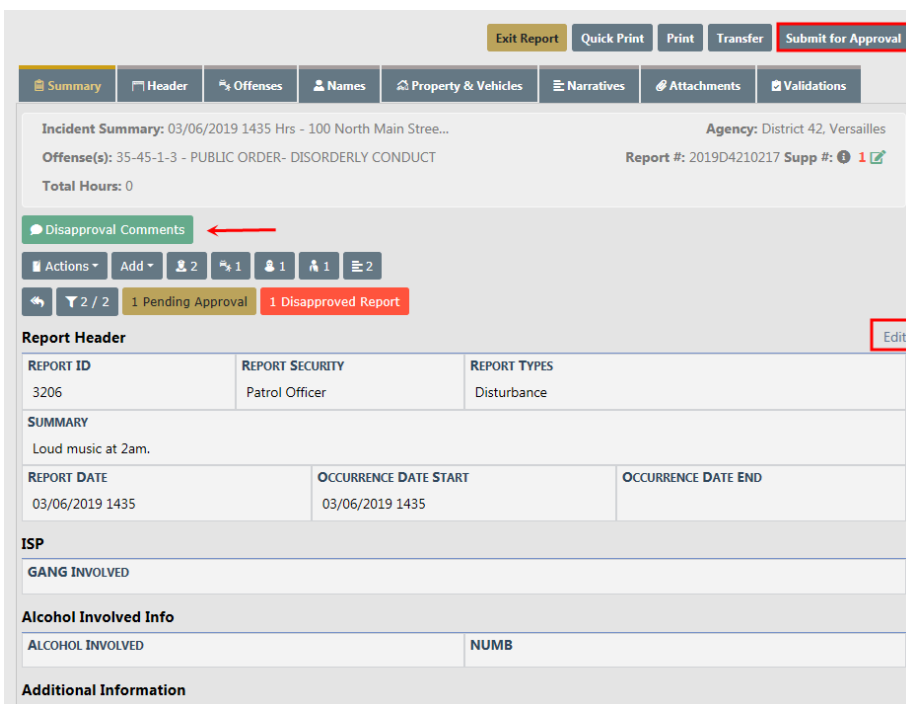
Supervisor Comment	Creator	Acknowledged	Response Comment (Optional)
Please provide additional comments.	Saur, Christine	<input checked="" type="checkbox"/>	Detailed comments added.

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

**NOTE:** All disapproval comments must be acknowledged prior to submitting report for approval.



On the *Incident Report* page, click **Edit** on the top right of applicable sections to make any necessary changes.



**NOTE:** The **Disapproval Comments** button turns green when supervisor disapproved comments are acknowledged.

Click the **Submit for Approval** button on the top right of the *Incident Report* page. For more information on submitting incidents for approval, refer to "Incident Report – Submit For Approval" on page 213.

Click the **Submit** button on the bottom of the *Submit for Approval* page. Notice the disapproval comments and responses appear on the bottom of the page.

Incident Summary: 03/06/2019 1435 Hrs - 100 North Main Street... Agency: District 42, Versailles  
 Offense(s): 35-45-1-3 - PUBLIC ORDER- DISORDERLY CONDUCT Report #: 2019D4210217 Supp #: 1  
 Total Hours: 0

APPROVING AGENCY: District 42, Versailles | APPROVING GROUP: PATROL Supervisor | REPORT HOURS: 0 Hrs 0 Min

OTHER COMMENTS

Disapproval Comments				
Section	Supervisor Comment	Creator	Response Comment	Acknowledged
Summary	Please provide additional comments.	Saur, Christine	Detailed comments added.	<input checked="" type="checkbox"/>

Go Back Submit

Select **Yes** to submit for approval.

Message From RMS

Confirm Submit for Approval?

No Yes

The *Approving Supervisor* receives notification that the Incident Report needs approval. For more information about the approval process refer to "Approve/Disapprove Incident Report" on page 353.

Click **Go Back** to return to your Home page.

### Incident Report Section – Summary Tab

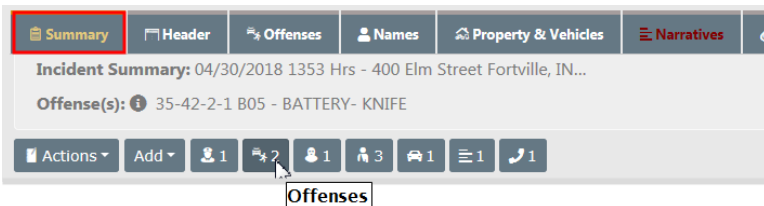
The **Summary** tab contains a summary of all the information that is contained in the other tabs of the current Incident Report.

Exit Report Quick Print Print Transfer Submit for Approval

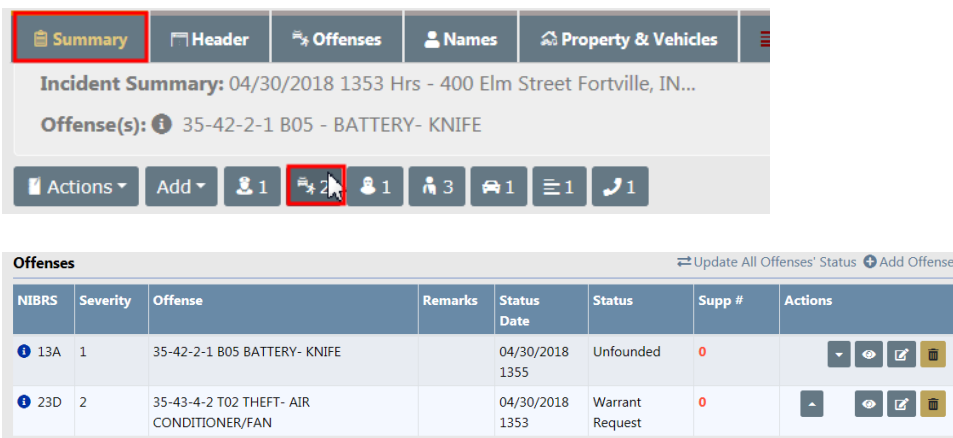
Summary Header Offenses Names Property & Vehicles Narratives Attachments Validations

Information in the **Summary** tab is divided into sections, such as Officers, Employees, Offenders, Victims, Narratives, etc.

The icons under the tab headers and Incident description are hyperlinks that direct you to each section. Hover your mouse over the icon to view a description of the hyperlink.

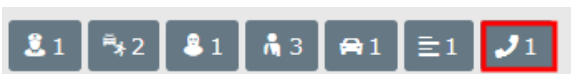


For example, select the *Offenses* hyperlink and you are directed to the *Offenses* section of the **Summary** tab.

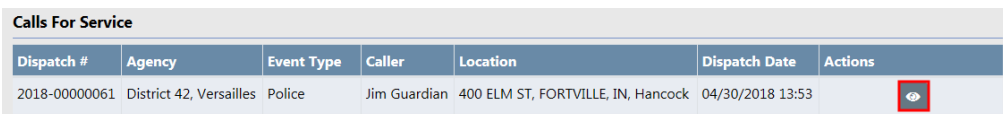


Add data to the Incident Report in sections that contain an **Add** hyperlink. For example, the **+ Add Person** hyperlink opens the **Person Search** screen to begin the process of adding a person to the report, and the **+ Add Field Arrest** hyperlink provides the ability to associate a *Field Arrest* to the report. This functionality also applies to other tabs of the report. For more information on using the **Add** feature refer to "Incident Report Header Tab" on page 172.

The **Calls for Service** section is located at the bottom of the **Summary** tab. Page down or click on the icon hyperlink to go directly to the CFS section.

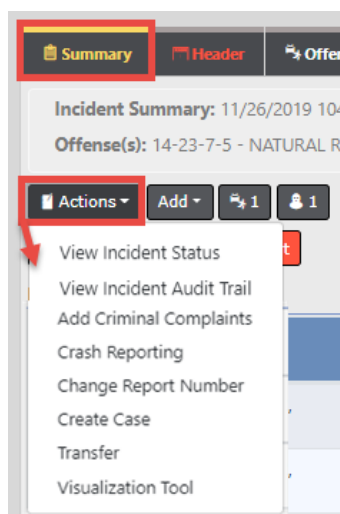


In the **Calls For Service** section, view the CFS by selecting the **View** icon  under the *Actions* heading.



Dispatch Info - 2018-0000061		
DISPATCHER ang		
DISPATCH AGENCY Indiana State Police	CALL DATE 04/30/2018 13:53	
CALL RECEIVED PHONE	CALLER NAME Jim Guardian	CALLER PHONE # 111-222-3333
PRIORITY High	EVENT TYPE Police	CALL / ACTIVITY DOMESTIC

The Summary tab also contains an **Actions** button that allows you to perform certain actions. Click on the button to view a drop-down list of choices from which to choose. This list is based on permissions and varies by agency.



### Crash Reporting

If configured for your agency, this option is a single sign-on to the Ethos home page for States where the LexisNexis Ethos Crash application is available.

### Add Criminal Complaints

This option is available providing you have the appropriate permissions and the feature is turned on for your agency.

Perform one of the following options on the **Summary** tab to add a Criminal Complaint:

- Click the **Actions** menu button, then click **Add Criminal Complaints**.
- or **Page down** on the Summary tab to the Criminal Complaints section and click **Add Criminal Complaints**.

The *Create Criminal Complaint* form opens.

**Create Criminal Complaint(s)**

A criminal complaint with the following details will be created for each selected person

**OFFENDERS**

<input checked="" type="checkbox"/>	Person Name	Roles
<input checked="" type="checkbox"/>	Holly Stone	Suspect / Offender

**Details**

**CHARGES**

<input type="checkbox"/>	Charge
<input checked="" type="checkbox"/>	35-43-4-2 T68 THEFT- POSSESS STOLEN PROPERTY

**COMPLAINT TYPE**

Summons

**MAKE ME THE COMPLAINT OFFICER**

**ATTACH FULL INCIDENT PRINTED REPORT PDF**

Cancel Save

Select the Offenders.

- The names listed are only the Incident suspect/offenders that do not already have a criminal complaint associated with the incident.
- A Criminal Complaint is created for each person selected.
- Only displays.

Select one or more Charges.

- At least one charge is required.

Select the **Complaint Type** from the drop-down list.

If applicable, check the box to make yourself the **Complaint Officer**.

If the Incident has Custom Forms, an option displays allowing you to select any or all **Custom Forms** to be associated with the criminal complaint.

If applicable, check the box if you want to attach the full **Incident Printed PDF Report**.

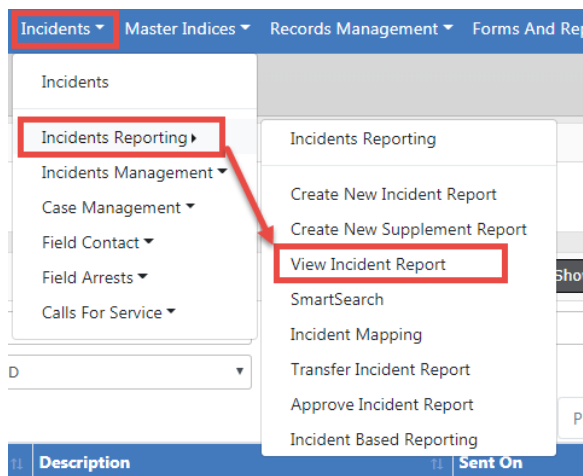
- If the Incident has **Custom Forms** and it is configured to create a fillable form, the fillable form PDF is associated with the criminal complaint instead of the custom form.

Click **Save** to create the Criminal Complaints and associate them to the Incident Report supplement automatically.

- The complaints are listed in a grid on the *Summary* page. You can further edit the complaint and submit for approval.


## View Incident Reports

The option to **View Incident Reports** is in the Incidents menu.



A **Incident Search** window opens, where you can search for a particular incident to view by entering data in any field or combination of fields. For more information on incident searching, refer to "Incident Search" on the facing page.

Click on the view icon  in the incident Search Results to view the Incident Report.

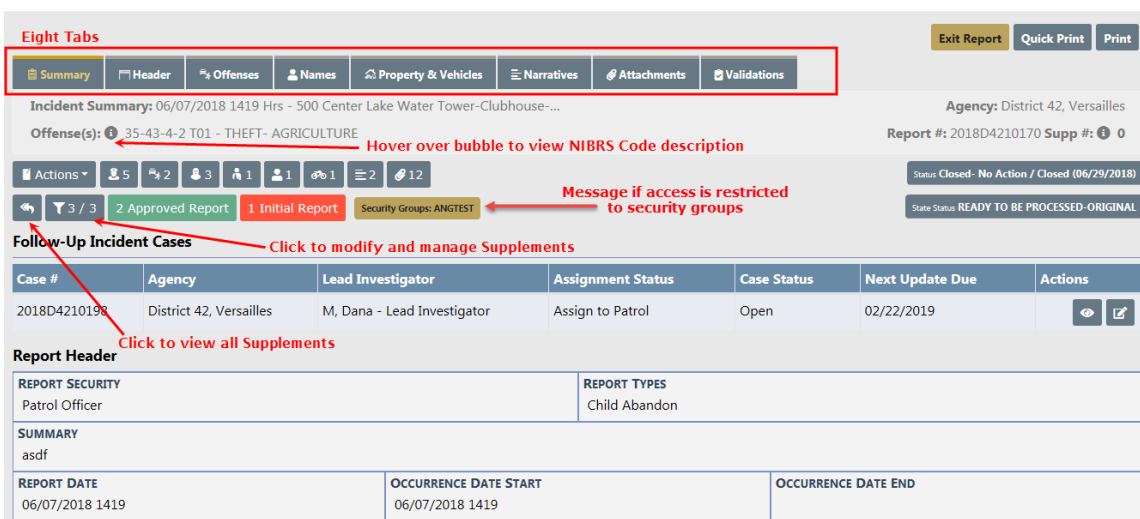
The *Summary* tab opens by default. If the report has more than one Supplement, the number of Supplements are listed next to the  icon.

**Note:** The *Summary* tab will also advise if a follow-up Case has been assigned to the incident.

**Note:** With appropriate permissions, an investigative case can be created directly from an *initial unapproved* Incident report using the **Actions** button.

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

For more information on the *Summary* tab, refer to "Incident Report Section – Summary Tab" on page 218.



Click on each tab heading to navigate to the different tabs of the Incident report.

## Incident Search

The **Incident Search** window allows you to search for incidents by entering data in any field or combination of fields. When entering the report number you can use the % sign as a wildcard. For example, if you were looking for report number 2018D4210149, you could enter %10149 and the report would be located. Agency defaults to your agency, but with appropriate permissions, a different agency in your workgroup can be selected. Select the *Additional Search Criteria* for more search options.

**Incident Search** Incident SmartSearch

REPORT #

REPORT TYPE  
Click To Select

APPROVAL STATUS  
-Select-

SUMMARY

FOLLOW UP ACTION  
-Select-

STATUS / DISPOSITION  
-Select-

AGENCY  
All Agencies

REPORT DATE FROM REPORT DATE TO

OCCURRENCE DATE FROM OCCURRENCE DATE TO

APPROVAL DATE FROM APPROVAL DATE TO

GANG RELATED  
-Select-

ADDITIONAL SEARCH CRITERIA  
-Select-  
-Select-  
Name  
Address  
Offense  
Officer  
Property  
Vehicles  
Organization  
Combo  
Citations  
Partial  
Incident Narrative  
Incident Based Reporting  
Public Release  
Case Review Status  
Calls for Service  
Custom Fields

Go Back Reset Search

You can search for incidents across all agencies within the user's state by clicking on the **Incident SmartSearch** button on the top right of the screen. For more information on **SmartSearch** refer to “SmartSearch” on page 225.

If you type in a specific report number, the system takes you directly to the report. If you click the **Search** button without entering any search criteria, a message appears in red at the top of the screen instructing you to specify at least one field when performing a search. Regardless of which method you use to query the system, except for specific report number, you will receive a list with reports matching your search criteria.

Show Map Refine Search New Search



Q Incident Search Results Export results to a file

24 result(s) found

Agency	Report #	Report Date	Supp #	Summary	Actions
D42	2019D4210231	11/21/2019 0937 Hrs	0	1001 North East Main Street INDIANAPOLIS, IN Offense(s): 1; 35-43-2-1 B03 - BURGLARY-ATTEMPTED	View Report
D42	2019D4210230	06/18/2019 1457 Hrs	0	100 North Main Street BLOOMINGTON, IL	
D42	2019D421022			Stolen property reported. Click to view Entire Entry	

At the top of the *Incident Search Results* window there is a **Show Map** feature that plots the listed reports with GEO Verified addresses using **Google Maps**. The **Export Results** allow you to export the list to a PDF document which can be printed, export to an Excel document, export to a Comma Spaced Values (CSV) file, or to an Extensible Markup Language (XML) file.



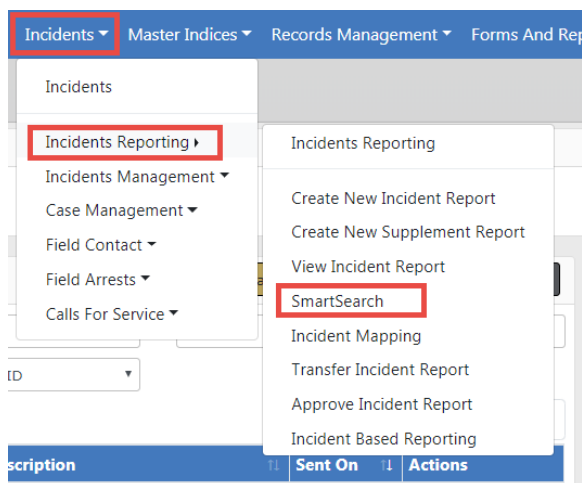
Click on the view icon  to view the Incident Report. The *Summary* tab opens by default. If the report has more than one Supplement, the number of Supplements are listed next to the  icon.

## SmartSearch

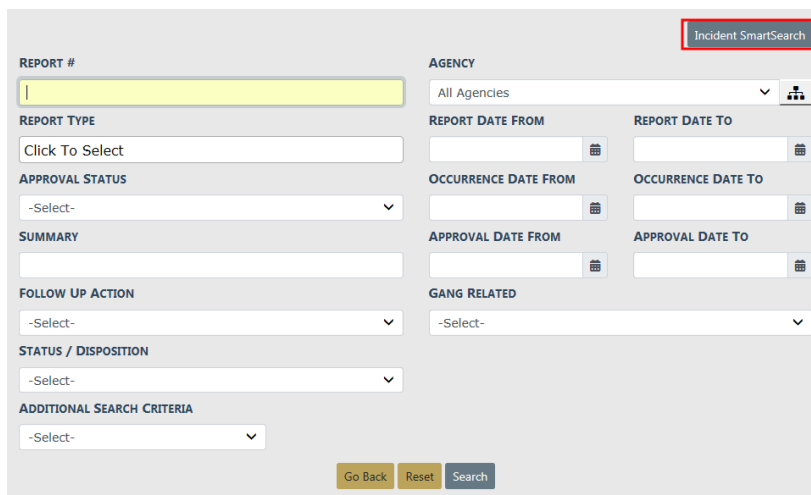
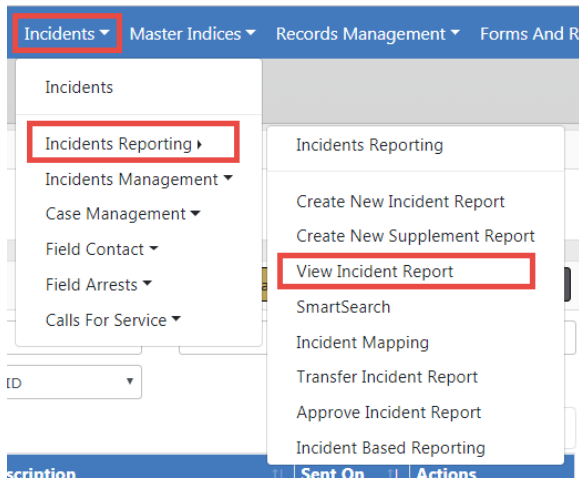
Users can, with appropriate permissions, search for incidents across all agencies in the Online RMS system within the user's State, outside of the State if configured by your agency, or both. You can also limit your search using date range filters. This search adds a simple interface to perform searches the way one would in an Internet search engine, such as Google.

You can access **SmartSearch** two ways:

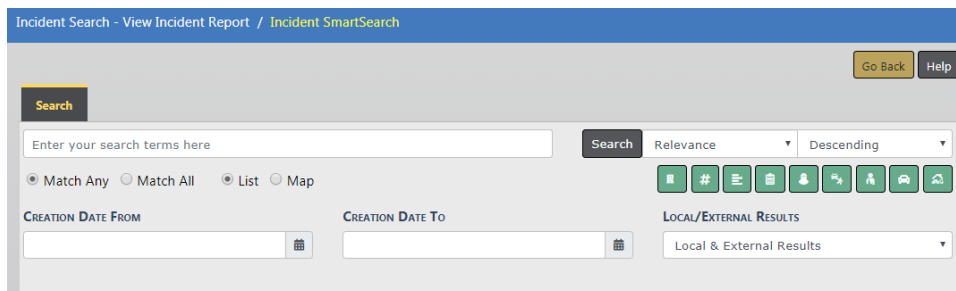
- Click the *Incidents* menu on the top navigation bar, click *Incidents Reporting*, then click the *SmartSearch* option.



- Or click *the Incidents* menu on the top navigation bar, click *View Incident Report*, then click the **Incident SmartSearch** button on the Incident Search screen.



Either option opens the *Incident SmartSearch* screen.



Enter a word or phrase into the search box on the upper left, then click the **Search** button. The results display based on how well they match the entered text.

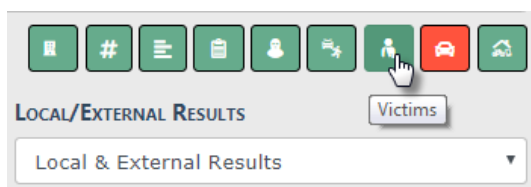
**NOTE:** The **SmartSearch** only searches on Approved incident reports. Incident reports with other statuses can be searched using the standard View Incidents option in the Incidents menu.

The default sorting option is *Relevance*, which means **SmartSearch** sorts the returning documents based on how well they match the entered text. There are other sorting options available in the *Sort By* area.

To ensure that each document contains every search word specified, check the *Match All* option. This forces the search to return documents which only contain all of the words or phrases entered in the search bar.

Review the search results in a *List* format, or on a *Map*.

The green icons on the right side of the page indicate what areas of the incident report are being searched. Hover your mouse over an icon to view what it represents. Click on each icon to disable or enable an area. Disabling will cause **SmartSearch** to exclude that area from the search; red icon excludes and green includes.

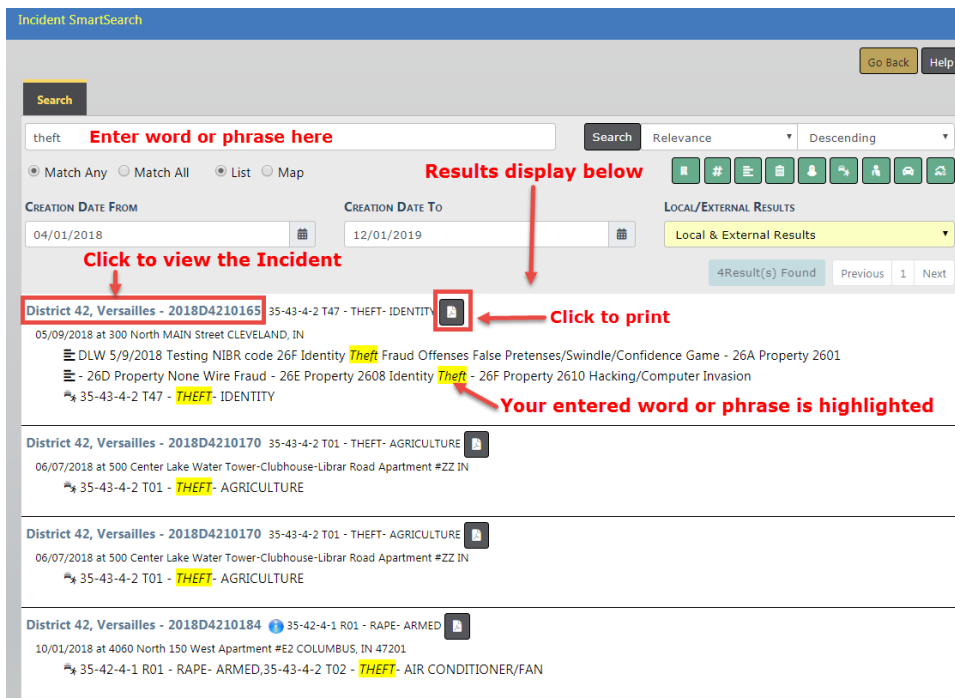


Optionally, enter a date range to filter your search results for specific date ranges.

You can filter by *Local Results Only*, *External Results Only*, or *Local & External Results* if configured by your agency.

If you chose to display the results in a *List*, the results highlight the text matching your query. If any *Offenders* in the matched reports have mug shots, these also display. You can view the report by clicking on the **Incident Report #** link at the top of each result. This opens a new tab, letting you view the report details without actually leaving the search page. To return to the search page, click the **Search** tab.

Click on the print icon to print a specific Incident Report that appears in the results list.



## Printing Options

When viewing the **Incident Report** there are two print options available.



The **Quick Print** button will download a pre-formatted *Standard* view containing the basic information on the report, excluding attachments.

The **Print** button takes you to a full menu of print options. The top of the window has available print templates for easy selection.

- *Standard*-prints the main areas of the report and associated people. The checked areas can be edited to further customize your print.
- *Media*- selects the most common public information areas to include and appropriate redaction options. The checked areas can be edited to further customize your print. Please refer to your agency's policy on Public Information.
- *Full*- selects all areas of the report including attachments, forms and person details. The checked areas can be edited to further customize your print.

Go Back Print Report

Incident Summary: 11/21/2019 0937 Hrs - 1001 North East Main Stre... Agency: District 42, Versailles  
Offense(s): 35-43-2-1 B03 - BURGLARY- ATTEMPTED Report #: 2019D4210231 Supp #: 0

**Templates**

Standard  
 Media  
 Full (Includes All Person Details Reports, PDF Attachments and Images)

**Narrative Options**

Print Narratives  
 Use Old Narrative Print Feature Note: Narrative images will not be printed.  
 Print Signature Lines On Narratives  
 Print 'DRAFT' Watermark on All Pages When Report is Not Approved  
 Print 'Pending Review' on Page Headers When a Review is Still Pending.  
 Print Page Breaks Between Narratives

**Report Options**

REPORT TITLE  
Incident Report

Print Only Original Officers  
 Show Approving Officers  
 Print Offender Mugshots  
 Include Form Attachments  
 Include Custom Fields

Choose a print template and select the options you wish to include on the report.

Click the **Print Report** button to download the report to your local machine, click on the report to open it in a new window, then click on the printer icon to send it to the printer. For your convenience, the **Print Report** button is located on the top right and on the bottom of the report window.


## Changing Incident Status


With proper authority you can change the status of an *Approved Report* to either *Initial* or *Disapproved* from the **Incident Status** screen. Every change to the **Incident Status** is tracked in the *Status History*.

You can access the **Incident Status** screen from the *View Incident Report* screen, or from the *Incident Report* menu.

### From View Incident Report

Click on the *Incidents* menu on the top navigation bar, select the *Incidents Reporting* submenu, then select *View Incident Report* to display the Incident Search screen. For more information using this method, refer to "View Incident Reports" on page 222.

On the *Incident Search Results* screen, click the view icon  to view the incident.

Agency	Report #	Report Date	Supp #	Summary	Actions
D42	2018D4210149	02/21/2018 1040 Hrs	0	6523 Anystreet Anytown, NJ 45623-0123 Offense(s): 2: 14-15-4-3 - NATURAL RESOURCE- WATERCRAFT CRASH- DUTIES OF OCCUPANTS, 14-15-4-3 - NATURAL RESOURCE- WATERCRAFT CRASH- DUTIES OF OCCUPANTS	

Click the **Actions** button on the *Summary* tab of the Incident Report, then select **View Incident Status**.

**Incident Summary:** 02/21/2018 1040 Hrs - 6523 Anystreet Anytown, NJ 45623-...  
**Agency:** District 42, Versailles  
**Offense(s):** 14-15-4-3 - NATURAL RESOURCE- WATERCRAFT CRASH- DUTL...  
**Report #:** 2018D4210149 **Supp #:** 0



**Follow-Up Incident Cases**

Case #	Agency	Lead Investigator	Assignment Status	Case Status	Next Update Due	Actions
2018D4210149	District 42, Versailles	Ranz, Greg QA - Lead Investigator	Assign to CID	Open Pending Destruction of Property	03/14/2018	


**Report Header**

<b>REPORT SECURITY</b> Patrol Supervisor	<b>REPORT TYPES</b> Burglary / Vehicle, Child Abused, Child Abandon, Child Custody, Criminal Mischief, Child Neglect
---	---

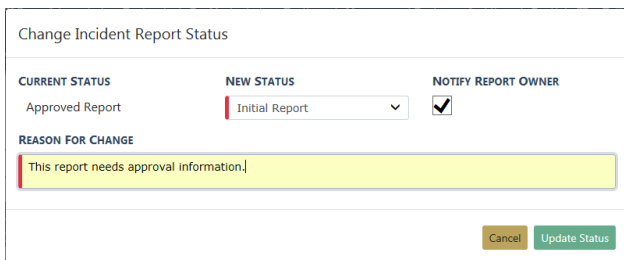
- View Incident Status
- View Incident Audit Trail
- Create Supplement
- View Incident Based Reporting Values
- Edit This Incident
- Warrant / Charge Request
- Visualization Tool

Click on the select icon  on the right of the appropriate Incident to open the **Incident Status** record, then click on the change status icon  to open the *Change Incident Report Status* screen.



Report Type	Date	Reporting Officer	Supplement Owner	Approval Status	Security Level	Actions
Original Report	02/21/2018	SERGEANT-CAPTAIN-WIN Greg QA Ranz #9696	Homer Simpson	Approved Report	Patrol Supervisor	  
Supp #1	02/21/2018	SERGEANT-CAPTAIN-WIN Greg SUPER LONG NAME QA Ranz SUPER LONG NAME #9696	Homer Simpson	Initial Report	Patrol Supervisor	  

On the *Change Incident Report Status* screen, click **New Status** and select a status from the drop-down list, enter the **Reason For Change**, select whether or not to **Notify Report Owner**, then click the **Update Status** button.



Change Incident Report Status

CURRENT STATUS: Approved Report

NEW STATUS: Initial Report

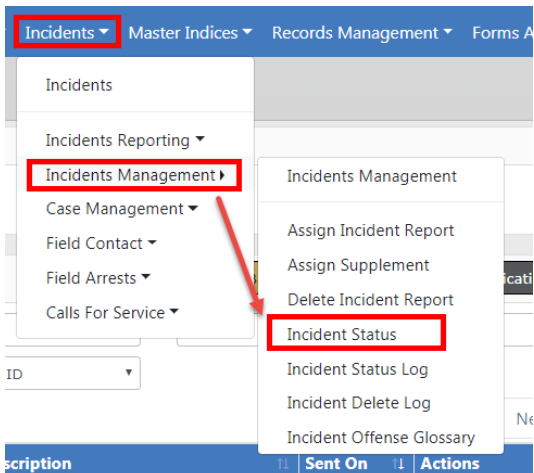
NOTIFY REPORT OWNER:

REASON FOR CHANGE: This report needs approval information



Buttons: Cancel, Update Status



### From the Incident Management Menu

Click on the *Incidents* menu on the top navigation bar, select the *Incidents Management* submenu, then select *Incident Status* to display the Incident Search screen.



Enter the search criteria then click the **Search** button to display the Search Results.

Click on the select icon  on the right of the appropriate Incident to open the **Incident Status** record, then click on the change status icon  to open the *Change Incident Report Status* screen.

Agency	Report #	Report Date	Supp #	Summary	Actions
D42	2018D4210141	01/09/2018 1436 Hrs	0	515 Jefferson Boulevard Greenfield, IN Offense(s): 2; 35-43-2-2 C01 - CRIMINAL TRESPASS- AUTO, 35-43-2-2 C01 - CRIMINAL TRESPASS- AUTO	 

Report Type	Date	Reporting Officer	Supplement Owner	Approval Status	Security Level	Actions
Original Report	01/09/2018	SERGEANT-CAPTAIN-WIN Greg QA Ranz #9696	Homer Simpson	Approved Report	Patrol Supervisor	  
Supp #1	01/09/2018	SERGEANT-CAPTAIN-WIN Greg QA Ranz #9696	Homer Simpson	Disapproved Report	Patrol Supervisor	  
Supp #2	02/15/2018	Detective Brent (officer) Williams #643	Brent (officer) Williams	Disapproved Report	Patrol Officer	  

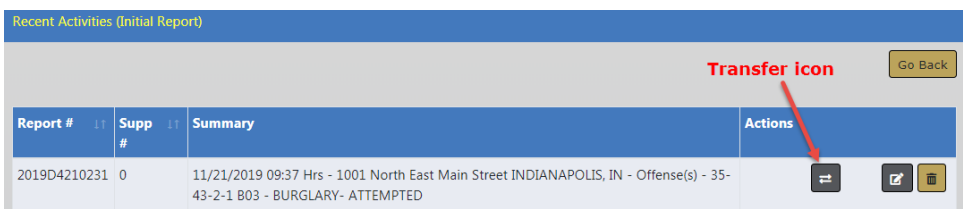
On the *Change Incident Report Status* screen, click **New Status** and select a status from the drop-down list, enter the **Reason For Change**, select whether or not to **Notify Report Owner**, then click the **Update Status** button.



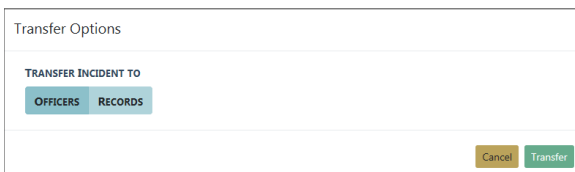
# Transfer Incident Report

You have the ability to **Transfer Incidents** (Initial and Supplements) to other officers or to *Records*. You must *own* the report and it must be in *Initial* or *Disapproved* status. This can be done from the **Recent Activities** menu, or by searching for reports using the **Transfer Incident Report** section in the **Incidents** menu.

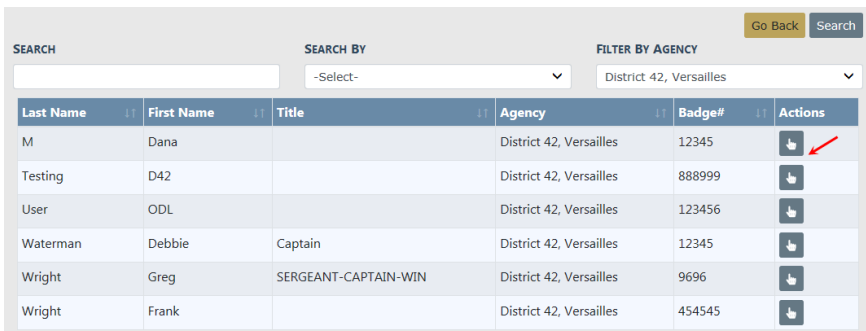
## My Recent Activities



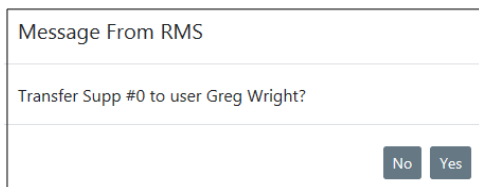
Select the **Transfer** icon to open a window with the transfer options.



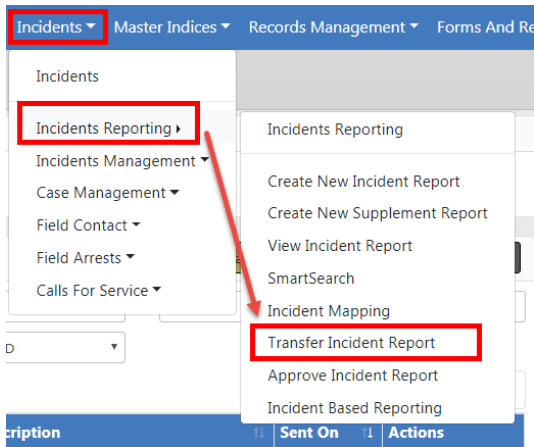
Select **Officers** or **Records** then click the **Transfer** button. If **Officers** is chosen, then select the appropriate officer by clicking the **Hand** icon.



Select **Yes** to confirm the transfer, or select **No** to return to the *Select User* page.



## Incidents Menu



Enter the search criteria then click the **Search** button to return the search results, then select the **Transfer** icon to open a window with the transfer options..

The screenshot shows the 'Incident SmartSearch' form. It contains several input fields for search criteria: REPORT #, REPORT TYPE, APPROVAL STATUS, SUMMARY, FOLLOW UP ACTION, STATUS / DISPOSITION, and ADDITIONAL SEARCH CRITERIA. There are also date pickers for REPORT DATE FROM, REPORT DATE TO, OCCURRENCE DATE FROM, OCCURRENCE DATE TO, and APPROVAL DATE FROM, APPROVAL DATE TO. A dropdown menu for AGENCY is set to 'All Agencies'. At the bottom, there are 'Go Back', 'Reset', and 'Search' buttons.

The screenshot shows the 'Incident Search Results' table. The table has columns for Agency, Report #, Report Date, Supp #, Summary, and Actions. The first row shows a report from Agency D42, Report # 2018D4210203, Report Date 12/03/2018 09:14 Hrs, Supp # 0, and Summary '500 Lincoln Street Apartment #33 Terre Haute, IN Offense(s): 1; 35-43-2-1 B02 - BURGLARY- APARTMENT COMPLEX'. The Actions column for this row contains a 'Transfer' icon (two arrows) and a 'Click to transfer' label.

Agency	Report #	Report Date	Supp #	Summary	Actions
D42	2018D4210203	12/03/2018 09:14 Hrs	0	500 Lincoln Street Apartment #33 Terre Haute, IN Offense(s): 1; 35-43-2-1 B02 - BURGLARY- APARTMENT COMPLEX	Click to transfer

Select either **Officers** or **Records** in the *Transfer Options* window then click the **Transfer** button.

The screenshot shows the 'Transfer Options' window. It has a title bar 'Transfer Options' and a section 'TRANSFER INCIDENT TO' with two buttons: 'OFFICERS' and 'RECORDS'. At the bottom right, there are 'Cancel' and 'Transfer' buttons.

If **Officers** is chosen, then select the appropriate officer by clicking the **Hand** icon.

Last Name	First Name	Title	Agency	Badge#	Actions
M	Dana		District 42, Versailles	12345	
Testing	D42		District 42, Versailles	888999	
User	ODL		District 42, Versailles	123456	
Waterman	Debbie	Captain	District 42, Versailles	12345	
Wright	Greg	SERGEANT-CAPTAIN-WIN	District 42, Versailles	9696	
Wright	Frank		District 42, Versailles	454545	

Select **Yes** to confirm the transfer, or select **No** to return to the *Select User* page.

Message From RMS

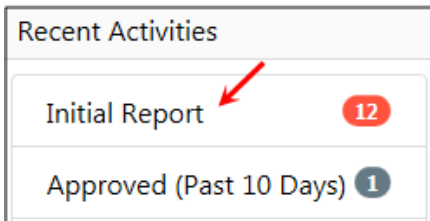
---

Transfer Supp #0 to user Greg Wright?

**NOTE:** Once ownership has changed hands, only the new owner can edit it as if it were an *Initial Report* of their own.

## Delete Initial Incident Report

A report that is initial status, and not submitted for approval, can be deleted by the owner of the report or by other users who have the delete authority. This can be done until you submit the report for approval. As the owner of a report, you can quickly access it from **Recent Activities** using the **Initial Report** link.




**NOTE:** Before proceeding further be aware that reports that are deleted are not recoverable from the database. A *Delete Log* is available, where a list of reports that have been deleted and by whom can be viewed.

Use the following procedure to delete one of your reports that is still in **Initial Status**.

1. If needed, click the *Home* tab in the upper left corner of the screen to open your *Home* page.
2. From the **Recent Activities** section, click on the number link to the right of **Initial Report** to open the **Recent Activities** window with a listing of your recent incident reports that are still in **Initial Status**.

Report #	Supp #	Summary	Actions
2018D4210173	0	07/16/2018 23:00 Hrs - Offense(s) - 35-43-2-1 B02 - BURGLARY- APARTMENT COMPLEX	  
2018D4210172	0	07/12/2018 23:00 Hrs - Offense(s) - 14-15-11-11 - NATURAL RESOURCE- OPERATE A MOTORBOAT WHILE LICENSE SUSPENDED	  
2018-04-120-000011	0	04/30/2018 13:53 Hrs - 400 Elm Street Fortville, IN 46040 - Offense(s) - 35-42-2-1 B05 - BATTERY- KNIFE	  

3. Locate the report you want to delete and click the delete icon .

Delete Incident

Please enter a comment for deletion of 2019D4210218 Supp # 0

**COMMENT**

4. Type the reason for deletion in the **Comment** text box and click the **Delete** button to return to the **Recent Activities** window.

## Expunging Records

Refer to your agency's policy on **Expunging Records**. When an agency is required to expunge a record, the specifics on what needs to be expunged are in the Court Order.

With proper permissions you can expunge an offender/arrestee from an Incident Report or expunge an entire Field Arrest. Expunged records will no longer be visible throughout Online RMS unless the user is granted permissions to view expunged details.

For detailed instructions on expunging records in Online RMS refer to "Expungements" on page 675.

# Chapter 12. Supplement to Incident Reports

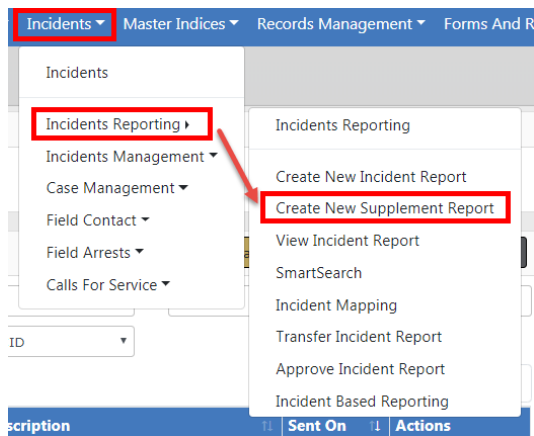
## Create Supplements

Once an **Initial Report** is in the system, **Supplement Reports** can be created and attached to the **Initial Report**. The **Initial Report** is designated as *Supp# 0* and additional Supplements are then added in sequential order (e.g., *Supp. # 1*, *Supp. # 2*, etc.). Create **Supplements** to your own reports or to reports belonging to other users.

A **Supplement** can be entered to a report from your agency, even if the **Initial Report** is not yet completed; however, you cannot create a supplement to a report from another agency unless that **Initial Report** has been approved.

Supplements can be created using different methods:


- From the Incidents Menu.











Search for the report by using the provided *Incident Search* screen. You must enter at least one search criteria. For more information on searching for incidents, refer to "View Incident Reports" on page 222.

Select the appropriate incident from the search results.

- From an existing Case, to which an Incident is associated.

Access the Case, then page down to the *Associated Incident(s)* section. Click on the Create Supplement icon  on the appropriate Incident. For more information on Cases, refer to "Case Management" on page 381.

Associated Incident(s) <span style="float: right;">+ Create Incident + Associate Incident</span>						
Report #	Incident Summary	Offenses	Comments	Date Of Info	Associated Event #	Actions
2019D4210230	06/18/2019			06/18/2019	This Case	  
2019D4210216	03/04/2019 - 700 North Broadway Street Greenfield, IN			06/18/2019	This Case	   

**Create Supplement**

- From the *Actions* menu when viewing an incident report.

Summary
Header
Offenses
Names
Property & Vehicles

Incident Summary: 04/03/2019 1514 Hrs - 123 Cherry Lane Golden, IN  
Offense(s): 35-43-2-1 B01 - BURGLARY- AIRPORT

Actions
2
1
1
1
1

- View Incident Status
- View Incident Audit Trail
- Create Supplement
- View Incident Based Reporting Values
- Edit This Incident
- Warrant / Charge Request
- Create Case
- Narrative Maintenance
- Visualization Tool

**REPORT SECURITY**  
Animal Control

**OCCURRENCE DATE S**  
04/03/2019 1514

Whichever method you choose, a *Confirm Incident Supplement* window appears once you elect to create a Supplement:

Confirm Incident Supplement

Click Generate to create a new incident supplement

Cancel
Generate

Click **Generate** to continue with creating the **Supplement**.

There is no Incident Wizard when creating **Supplements** since there are only two minimum requirements which must be met before it can be submitted for approval.

- Reporting Officer for the Supplement
- Narrative

Although these are the two minimum requirements, a user is able to contribute any and all applicable information to a **Supplement** including *Attachments*.

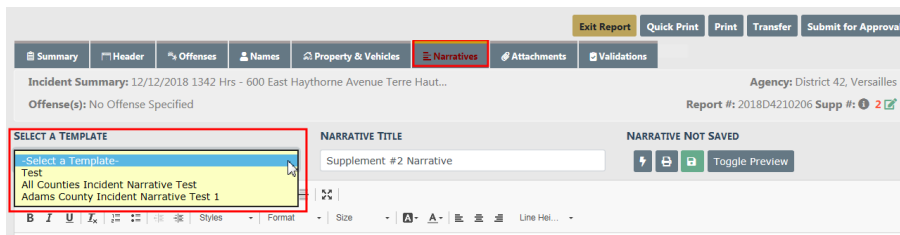
**NOTE:** The system adds you as a *Reporting Officer* automatically.

## Supplement Rules

- The **Initial Report** is designated as *Supp# 0* and **Supplements** are then added in sequential order (e.g., *Supp. # 1*, *Supp. #2*, etc.).
- You can add a supplement that does not include NIBRS reporting data (i.e., add a narrative only) and submit for approval without satisfying any NIBRS validations that may exist from a previous supplement.
- You must be the owner of the *Supp* to edit it.
- Incidents can only be edited when in **Initial Status** or **Disapproved Status**.
- Incidents cannot be edited while in **Approved Status**.
- Incidents can only be deleted when in **Initial Status**.

## Supplement Templates

Agency Templates can be used when creating the *Narrative* section of the **Supplement**. At the top of the built-in narrative creator, there is a drop-down box labeled **Select a Template** where you can choose a template.



The screenshot shows the 'Narratives' tab in a reporting system. At the top, there are buttons for 'Exit Report', 'Quick Print', 'Print', 'Transfer', and 'Submit for Approval'. Below these are tabs for 'Summary', 'Header', '% Offenses', 'Names', 'Property & Vehicles', 'Narratives', 'Attachments', and 'Validations'. The 'Narratives' tab is selected. The incident summary is '12/12/2018 1342 Hrs - 600 East Haythorne Avenue Terre Haut...' and the agency is 'District 42, Versailles'. The report number is '2018D4210206 Supp #:' with a '2' in a red circle. A dropdown menu titled 'SELECT A TEMPLATE' is open, showing options: '-Select a Template-', 'Test', 'All Counties Incident Narrative Test', and 'Adams County Incident Narrative Test 1'. The 'Narrative Title' field contains 'Supplement #2 Narrative'. There is a 'Toggle Preview' button and a 'NARRATIVE NOT SAVED' warning.

Select a template from the list, complete the narrative, then click **Save**.





# Chapter 13. Community Reporting

## Community Reporting Overview

In response to COVID-19, Caliber Public Safety is offering a new product feature with Online RMS 11.3.2 to support **Community Reporting** of minor crimes, tips, and other police-related events. The **Community Reporting** feature leverages the power of Online RMS *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 making the forms available to the public via your agency's website.

### Benefits of **Community Reporting**:

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

**Routing** for *Publicly Available Custom Forms* notifies Online RMS users when a new public submission occurs. Taking action to review a *Custom Form* submission is a very similar process to reviewing non-public *Custom Forms*.

There are two ways to take action on *Publicly Submitted Forms*:

- From a Notification.
- From your Recent Activities.

For more information on taking action, refer to “Taking Action on Publicly Submitted Forms” on page 242.

Searching for and viewing *Publicly Available Custom Forms* is the same as searching for *Non-Publicly Available Custom Forms*. For more information, refer to “Search For and View Custom Forms” on page 57.

**Note:** For details on **Community Reporting** configuration, refer to the *Online RMS Admin Guide* or your agency administrator.

## Taking Action on Publicly Submitted Forms

**Routing** for *Publicly Available Custom Forms* notifies Online RMS users when a new public submission of a form occurs. Users designated by name or by role on the *Custom Form* configuration page, by your Online RMS agency administrator, receive a notification every time the public makes a new submission of a form. **Community Reporting** leverages the existing workflow and power of the Online RMS *Custom Forms* module. Taking action to review a *Custom Form* submission is a very similar process to reviewing non-public *Custom Forms*.

There are two ways to take action on *Publicly Submitted Forms*:

- “Taking Action via Notifications” on page 242.
- “Taking Action via Recent Activities” on page 249.

### Taking Action via Notifications

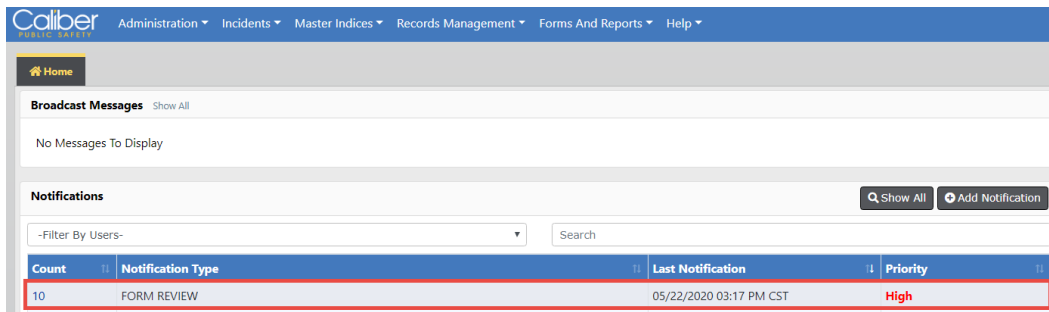
When the public makes a new submission of a public form, a notification appears on the **Online RMS Home Page**, within your **Notifications** queue.

Count	Notification Type	Last Notification	Priority
10	FORM REVIEW	05/22/2020 03:17 PM CST	High

The **Notification Type** for public form submissions is FORM REVIEW - *FORM NAME*

**Note:** For more information on **Notifications**, refer to “Notifications” on page 21.

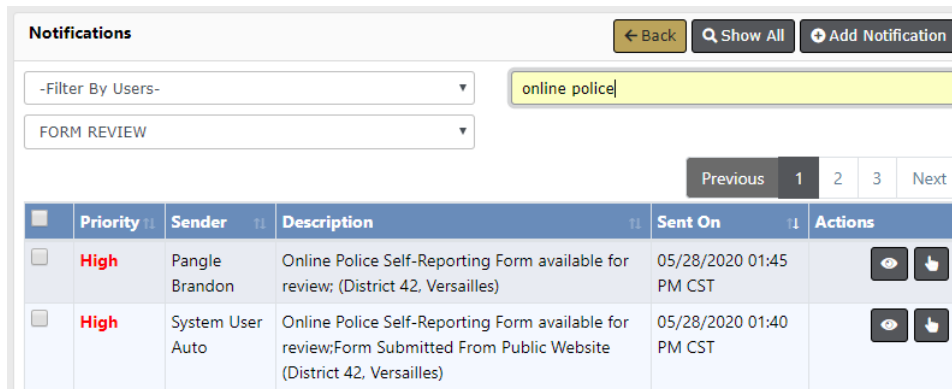
Follow these steps to review and take action.



1. Click on the hyperlinked **Count** indicator.

The Notification **Description** begins with the name of the *Custom Form*.

- Use the **Search By** option to filter by **Description** if your agency uses more than one *Custom Form* configured with *Form Review Routing*.



2. Click on the **Take Action** icon  to open the form.

Go Back

You have been notified to review and comment on this form.  
[Review](#)  
[Reject](#)

[Online Police Self-Reporting Form](#)
[Attachments](#)
[Audit Log](#)
[Comments And Routing History](#)

Pending Review [Print Form](#) [Change Status](#)

**Form Description**

IF THIS IS AN EMERGENCY PLEASE DIAL 911 NOTE: In the event that this involves shoplifting, you may be asked to come to the Police Department at a later date to file charges and you may also be asked to provide additional documentation regarding the statement or receipt of the stolen items. Once submitted, you will be contacted by a representative of the Police Department within 5 business days. If you have not heard from someone within 5 business days, please call 662-393-8652 to check the status of your report.

**Form Details**

SECURITY LEVEL  
 Animal Control

**Questions**

DO YOU KNOW THAT FILING A FALSE POLICE REPORT IS A CRIME?  
 No

ARE YOU EIGHTEEN (18) YEARS OF AGE OR OLDER?  
 No

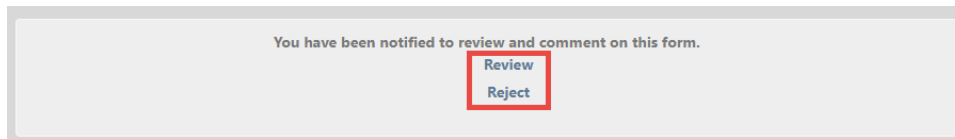
DID THE INCIDENT OCCUR WITHIN THE CITY LIMITS?  
 No

DO YOU KNOW WHO COMMITTED THIS CRIME?  
 No

There are four tabs.

- Tab 1 includes the **Information** as submitted by the public.
  - The form opens to this tab by default.
  - This tab is where you **Take Action**.
- Tab 2 includes **Images** submitted by the public.
  - Click on this tab to review images.
  - Presently, only one image can be uploaded with a public submission. *Allowing more images is planned for a future release.*
- Tab 3 maintains an **Audit** history of users access to the *Custom Form*.
- Tab 4 maintains **Comments** and **Routing History** of the submission and routing actions.

3. At the top section of Tab 1, **Reject** or **Review** (Accept) the form by choosing one of the options below.



You have been notified to review and comment on this form.

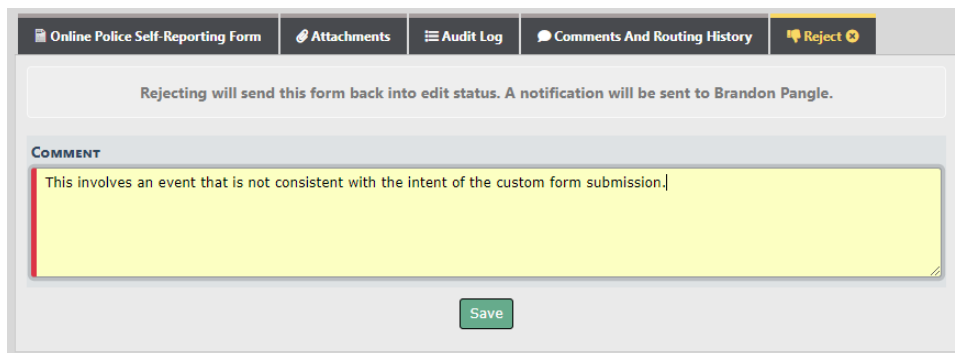
Review  
Reject

## **Reject**

1. Click **Reject** to reject the submission.

It is suggested that you use this option to track that the public submission is not consistent with the purpose of the custom form (e.g. does not involve a crime or is an event for which the public submission was **not** designed or your agency **does not** wish to track).

2. Enter a **Comment** or reason.



Online Police Self-Reporting Form | Attachments | Audit Log | Comments And Routing History | Reject

Rejecting will send this form back into edit status. A notification will be sent to Brandon Pangle.

COMMENT

This involves an event that is not consistent with the intent of the custom form submission.

Save

3. Click **Save**.
4. **Manually inform** the public submitter by email or phone call.

**Note:** Informing the public submitter does not happen automatically; this is a manual process.

## **Review without a Police Report**

Follow these steps when the submission involves an event that does not require a police report. You do, however, want to show the *Custom Form* was **Reviewed** and

**Accepted** by your agency.

1. Click **Review**.

The screenshot shows the 'Approve Form' tab selected. Below the tab are three sub-tabs: 'Approve Form', 'View Form', and 'Attachments'. The main content area has a 'COMMENT' section with a text area containing 'Reviewed public submission.'. Below that is a 'CREATE INCIDENT' section with an unchecked checkbox. At the bottom center is a green 'Save' button.

2. Enter a **Comment**.
3. Leave the **Create Incident** box *unchecked*.
4. Click **Save**.

### ***Review and File a Police Report***

Follow these steps when the submission involves a crime or event for which you need to **file an official police report**.

1. Click **Review**.
2. Check the **Create Incident** box on the *Approve Form* tab.
3. Depending on the configuration by your agency, the **Report Number** will either be *Auto Generated* or require *manual entry of a Case Number* requested and obtained from a CAD system, respectively as shown below.

The screenshot shows the 'Approve Form' tab selected. Below the tab are three sub-tabs: 'Approve Form', 'View Form', and 'Attachments'. The main content area has a 'COMMENT' section with a text area containing 'Reviewed community submission and creating incident report to document offense reported'. Below that is a 'CREATE INCIDENT' section with a checked checkbox. Below the checkbox is a message: 'Upon Creation, this form will be associated with the incident. Any information entered here can be changed later.' Below that is a 'REPORT NUMBER' field with a red border containing 'Auto Generated'. At the bottom are three fields: 'REPORT DATE/TIME' with the value '06/05/2020 1544', 'OCCURRENCE DATE/TIME', and 'INCIDENT TYPE'.

If the Report Number is **Auto Generated** as shown in the first example above, no additional action is required for the Report Number.

If the **Report Number Options** displays as shown in the second example above, enter the **Report Number** based on one of the following options you choose:

- a. The default option is to enter the digits of the Report Number obtained from CAD. RMS then generates the number using the **format defined**.
  - b. You can select the option to enter the **full #** obtained from CAD in the specified format.
4. Complete the remaining fields on the *Approve Form* tab.

**Note:** The *View Form* tab easily switches views, to view the Form for information needed to complete the Incident Fields on the *Approve Form* tab.

- a. **Report Date/Time** - Default to the system date and time. Update as needed.
- b. **Occurrence Date/Time** - Set to the date and time reported by public form submitter.
- c. **Incident Type** - This can be set to default to a **Type**, allowing tracking of incident reports originating from a *Publicly Available Custom Form*. If defaulted, it is recommended that you do not change the value.
- d. **Summary** - This field relates to the Crime/Media Summary field on the incident report.
  - Use the **Copy From** LOV to select copy text from a *Custom Form* field to the Summary.

- Use the LOV multiple times to **copy** information from multiple fields in the *Custom Form*.
- e. **Responsible User** - Default to your name as the creator of the incident report. You can select another user from your agency to assign/transfer the report.
- f. **Narrative** - Optional entry. Use this field to quickly create the Narrative for the incident report.
- Use the **Copy From** LOV to select copy text from a *Custom Form* field to the Narrative.
  - Use the LOV multiple times to **copy** information from multiple fields in the *Custom Form*.

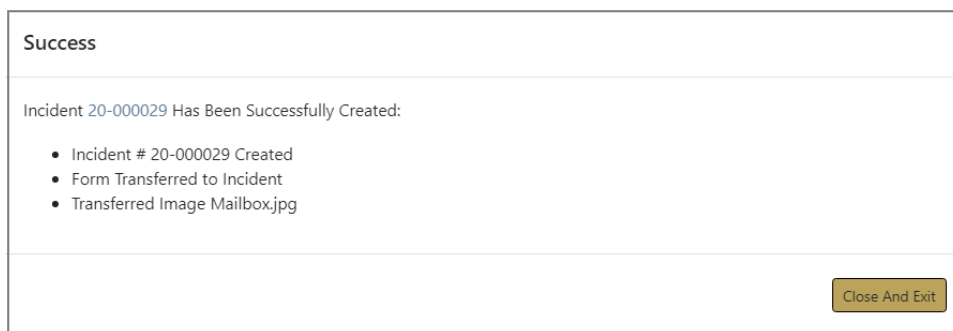
The screenshot shows a web-based form for creating an incident report. At the top, there are three tabs: 'Approve Form', 'View Form', and 'Attachments'. The form is divided into several sections:

- COMMENT**: A text area containing the text 'Reviewed community submission and creating incident report to document offense reported'.
- CREATE INCIDENT**: A checkbox is checked. Below it, a message states: 'Upon Creation, this form will be associated with the incident. Any information entered here can be changed later.'
- REPORT NUMBER**: A text field containing 'Auto Generated'.
- REPORT DATE/TIME**: A date and time picker showing '06/05/2020 1544'.
- OCCURRENCE DATE/TIME**: An empty date and time picker.
- INCIDENT TYPE**: A dropdown menu.
- SUMMARY**: A text area containing a detailed description of an incident: 'I was having a cup of coffee and watching TV when I heard a noise outside. I looked out my front window and saw a teenage male running away from my mailbox, which was not lying on the ground. Suspect was observed to be a white male under the age of 16, wearing a face mask, black hat, blue jacket, and blue jeans.'
- Copy From:** A dropdown menu with '-Select-' selected.
- RESPONSIBLE USER**: A text field containing 'Christine Saur Badge #: SAUR111'.
- NARRATIVE (OPTIONAL)**: A text area containing the same summary text as above.
- Copy From:** A dropdown menu with '-Select-' selected.
- Save**: A green button at the bottom center.

5. Click **Save** to create the **Incident Report** and set the **Status** of the *Custom Form* to **Reviewed**.



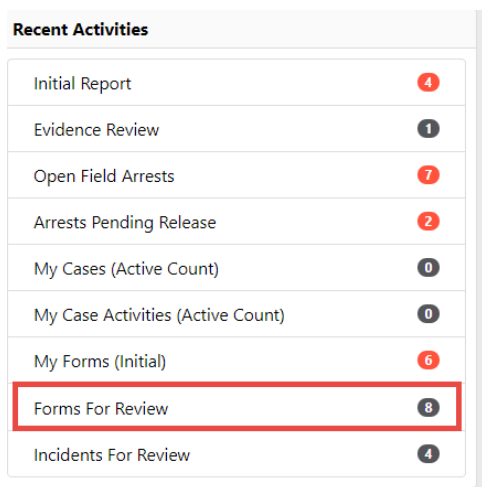
- A message displays indicating an **Incident Report** was created and the *Custom Form* and Image were automatically associated to the **Incident Report**.



- The user assigned to the incident report can take action to complete the report from their **Recent Activities - Initial Report** queue.
- Complete the incident report, adding location, offenses, names, and property/vehicles as required.

## Taking Action via Recent Activities

As an alternative to taking action via a *Notification*, you can, if you have access to review *Publicly Available Custom Forms*, **Take Action** from your *Recent Activities - Forms For Review* queue.



The process of reviewing the Custom Form from *Recent Activities* is the same as taking action from a *Notification*.

For information on accessing *Recent Activities*, refer to “Home Page” on page 8.

For information on taking action from a *Notification*, refer to “Taking Action via Notifications” on page 242.

**Note:** Once a *Form Review* is complete by either Accepting (Reviewing) or Rejecting the Custom Form, the notification deletes automatically and the Custom Form no longer appears for review in the *Recent Activities - Forms For Review* queue.

# Chapter 14. Criminal Complaint

## Criminal Complaint Overview

The **Criminal Complaint** module allows users, with appropriate permissions, to create and manage criminal complaints against arrestees and offenders, and approve or disapprove through a guided review process before submitting to the state.

**Note:** To utilize this module, it must be turned on for your agency.

Your agency has the option to utilize a 1 or 2 level approval process:

### 1-Level Approval Process

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

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

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

### 2-Level Approval Process

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

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

The supervisor approves the complaint.

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

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

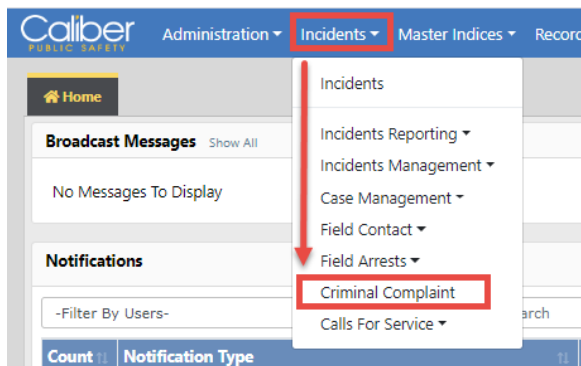
For more information on the approval process, refer to “Approve or Disapprove Criminal Complaint” on page 367.

## Accessing Criminal Complaint Module

If turned on for your agency, and you have appropriate permissions, the **Criminal Complaint** module is accessible using various methods.

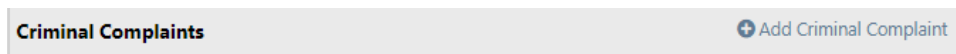
### *Standalone Module*

To access the **Criminal Complaint** standalone module, select the **Criminal Complaint** option from the *Incidents* drop-down menu.



### *From the Field Arrest*

There is a Criminal Complaints section on the Field Arrest, where you can, with appropriate permissions, add a Criminal Complaint or access existing Criminal Complaints.



For more information, refer to "Edit Field Arrest" on page 298.

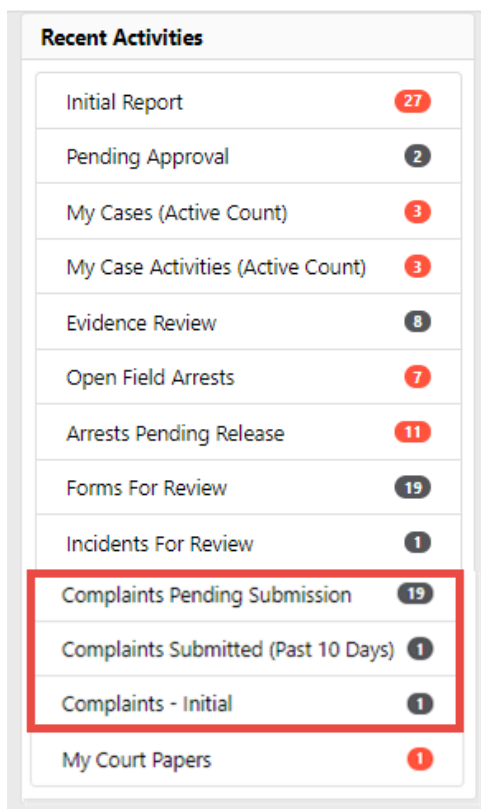
### *From the Incident Report*

With appropriate permissions, you can add Criminal Complaints from the Actions Menu or the Criminal Complaints grid on the Summary tab of the Incident Report. You can also access existing Criminal Complaints from the Criminal Complaints grid.

For more information, refer to "Incident Report Section – Summary Tab" on page 218.

## From Recent Activities

For your convenience, any **Initial Complaints**, **Complaints Pending Submission**, and **Complaints Submitted** within a past number of days defined by your administrator, appear under *Recent Activities* on your home page.



Recent Activities	
Initial Report	27
Pending Approval	2
My Cases (Active Count)	3
My Case Activities (Active Count)	3
Evidence Review	8
Open Field Arrests	7
Arrests Pending Release	11
Forms For Review	19
Incidents For Review	1
Complaints Pending Submission	19
Complaints Submitted (Past 10 Days)	1
Complaints - Initial	1
My Court Papers	1

Click on an activity to display the result list, for quick access to view or edit a complaint to add Case Number, appearance information and more.

For more information on editing, refer to "Edit a Criminal Complaint" on page 258.

For more information on viewing, refer to "View a Criminal Complaint" on page 263.

## Criminal Complaint Search

To search **Criminal Complaints** follow these steps:

1. Access the *Criminal Complaint* module. For instructions, refer to "Criminal Complaint Overview" on page 251.

2. A *Criminal Complaint Search* window appears.


**Note:** Click on the **Add Criminal Complaint** button to add a **Criminal Complaint**. For more information, refer to “Add a Criminal Complaint” on page 255

3. Enter the search **criteria** into the fields provided. The more criteria you use, the shorter the results list.
4. Click the **Search** button to display the search results.

Criminal Report Number	Date/Time	Agency	Complaint Type	Person	Status	Submission Status	Actions
20COMP0032	03/19/2020	District 42, Versailles	Summons	Martin, Sue	Initial		
20COMP0031	03/13/2020	District 42, Versailles	Hearing	Martin, Sue	Approved		

You can, with appropriate permissions, view, edit, and delete **Criminal Complaint** records from the results window.

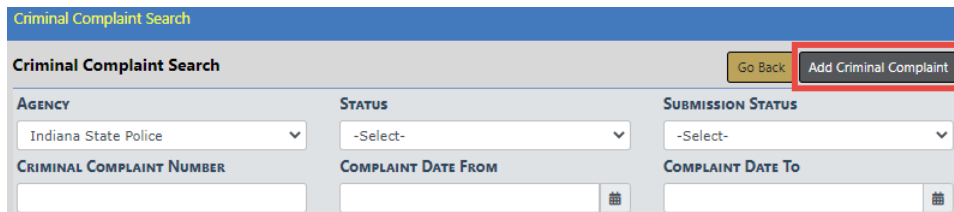
- Click on the **View icon** to view. For more information on viewing, refer to “View a Criminal Complaint” on page 263.
- Click on the **Edit icon** to edit. For more information on editing the **Criminal Complaint**, refer to “Edit a Criminal Complaint” on page 258.

- Click on the **Delete icon**  to delete, enter a **Comment** at the prompt to explain why you are deleting it, then click **Delete**.

## Add a Criminal Complaint

To add a **Criminal Complaint** record follow these steps:

1. Access the *Criminal Complaint* module. For instructions, refer to “Criminal Complaint Overview” on page 251.
2. The *Criminal Complaint Search* screen appears. Before adding the criminal complaint, it is recommended you first search for the criminal complaint record to verify whether or not it already exists, though not required. For instructions on how to search refer to “Criminal Complaint Search” on page 253.
3. Click on the **Add Criminal Complaint** button on the *Criminal Complaint Search* screen.



The screenshot shows the 'Criminal Complaint Search' interface. At the top, there is a blue header with the text 'Criminal Complaint Search'. Below this, the main form area has a title 'Criminal Complaint Search' and two buttons: 'Go Back' and 'Add Criminal Complaint'. The 'Add Criminal Complaint' button is highlighted with a red rectangular box. The form contains several fields: 'AGENCY' (a dropdown menu with 'Indiana State Police' selected), 'STATUS' (a dropdown menu with '-Select-' selected), 'SUBMISSION STATUS' (a dropdown menu with '-Select-' selected), 'CRIMINAL COMPLAINT NUMBER' (a text input field), 'COMPLAINT DATE FROM' (a date input field with a calendar icon), and 'COMPLAINT DATE TO' (a date input field with a calendar icon).

4. The *Criminal Complaint Search / Person Search* screen appears.

5. Enter the appropriate search **criteria** in the fields provided.

For more information on the search criteria options, refer to “Searching Master Records” on page 75.


6. Click the **Search** button to display the search results.

Last Name	First Name	Middle Name	Title	Sex	Race	DOB	SSN	Misc ID	Name Type	Index ID	Actions
JONES	WILLIAM			M	W	03/03/1965		oln123456	Alias	396	
JONES	WILLIAMS			M	W	03/03/1965		oln123456	Primary Name	396	
JONES	WILLIAMTWO			M	W	03/03/1965		oln123456	Alias	396	

7. Click the **Select icon** to choose the person record you want to associate with the **Criminal Complaint**.



If the person record doesn't exist in the results list, with appropriate permissions, you can click the **Add Person** button to add a *Master Person* record, then select it. For instructions on adding a *Master Person* record, refer to "Adding Person" on page 85.

You have the option to click the **Edit icon**  to update the master person record to correct or update person details before you select the record. You also have an opportunity to edit the person details from the *Add Criminal Complaint* screen on the next step.

8. The *Add Criminal Complaint* form opens.

Criminal Complaint Search / Person Search / Person Search Results / Add Criminal Complaint Go Back

---


**Complaint Details**

<b>DATE AND TIME</b> 06/16/2020 11:49	<b>COMPLAINT TYPE</b> -Select-	<b>COMPLAINT AGENCY</b> District 42, Versailles	<b>COURT</b> -Select-
<b>COURT CASE NUMBER</b> 	<b>HEARING TYPE</b> -Select-	<b>THREAT TYPE</b> -Select-	<b>CHARGE TYPE</b> -Select-

**Is JUVENILE**

---

**Person Details** View Person Details Update Person

<b>LAST NAME</b> JONES	<b>FIRST NAME</b> WILLIAMS	<b>DOB</b> 03/03/1965 (Age: 55)	<b>SEX</b> Male	<b>RACE</b> White	<b>ETHNICITY</b> Not Hispanic or Latino	 (2/4) 09/12/2012
<b>DRIVER'S LICENSE #</b> OLN123456	<b>DRIVER'S LICENSE STATE</b> Alaska	<b>ALIASES</b> Willy (Alias), WILLIAMTWO JONES(Alias), WILLIAM JONES(Alias)			<b>E-MAIL</b> testme@gmail.com	
<b>ADDRESS (RESIDENCE)</b> 126 North 750 West IN						
<b>HEIGHT</b> 5' 11"	<b>WEIGHT</b> 185	<b>PLACE OF BIRTH</b> United States of America	<b>CITIZENSHIP</b> United States of America	<b>EMPLOYER NAME</b> A1A Car Wash123		
<b>CAUTION CODES:</b> Assaultive/Combative						
<b>Misc IDs</b> OLN123456 (OLN) OLN123456 (OLN) OLN123456 (OLN)						
<b>SMTs AND OTHER CHARACTERISTICS:</b> Tattoo / Back					<b>INDEX ID</b> 396	

---

**Complainant Details**

**OFFICER**

Go Back Save & Continue

9. Enter the information in the fields provided.

10. Optionally, view or update person details.

11. Click the **Save & Continue** button.
12. The *Edit Criminal Complaint* form opens.
13. Make the necessary updates. For more information on updating the Criminal Complaint record, refer to “Edit a Criminal Complaint” on page 258.

## Edit a Criminal Complaint

To edit a **Criminal Complaint** record follow these steps:

1. **Search** for the Criminal Complaint record you want to edit or access it from **Recent Activities** on your home page.

For instructions on how to search refer to “Criminal Complaint Search” on page 253.

For instructions on accessing from Recent Activities refer to "Criminal Complaint Overview" on page 251.

2. In the *Search Results* grid, click the **Edit icon**  on the record you want to update.

Criminal Report Number	Date/Time	Agency	Complaint Type	Person	Status	Submission Status	Actions
20COMP0056	06/16/2020	District 42, Versailles	Warrant	JONES, WILLIAMS	Initial		

3. The *Edit Criminal Complaint* form opens.

Criminal Complaint Search / Edit Criminal Complaint


Go Back Print Submit for Approval

### Complaint Details

<b>CRIMINAL COMPLAINT NUMBER</b> 20COMP0056	<b>DATE AND TIME</b> 06/16/2020 11:49	<b>STATUS</b> Initial	<b>STATUS DATE AND TIME</b> 06/16/2020 12:09
<b>SUBMISSION STATUS</b>	<b>SUBMISSION STATUS DATE AND TIME</b>	<b>COMPLAINT TYPE</b> Warrant	<b>COMPLAINT AGENCY</b> District 42, Versailles
<b>COURT</b> -Select-	<b>COURT CASE NUMBER</b>	<b>HEARING TYPE</b> -Select-	<b>THREAT TYPE</b> Flight Risk
<b>CHARGE TYPE</b> Only Misdemeanors	<b>OBTN</b>	<b>IS JUVENILE</b> <input type="checkbox"/>	

View Person Details Update Person

### Person Details

<b>LAST NAME</b> JONES	<b>FIRST NAME</b> WILLIAMS	<b>DOB</b> 03/03/1965 (Age: 55)	<b>SEX</b> Male	<b>RACE</b> White	<b>ETHNICITY</b> Not Hispanic or Latino	
<b>DRIVER'S LICENSE #</b> OLN123456	<b>DRIVER'S LICENSE STATE</b> Alaska	<b>ALIASES</b> Willy (Alias), WILLIAMTWO JONES(Alias), WILLIAM JONES(Alias)			<b>E-MAIL</b> testme@gmail.com	
<b>ADDRESS (RESIDENCE)</b> 126 North 750 West IN						
<b>HEIGHT</b> 5' 11"	<b>WEIGHT</b> 185	<b>PLACE OF BIRTH</b> United States of America	<b>CITIZENSHIP</b> United States of America	<b>EMPLOYER NAME</b> A1A Car Wash123		
<b>CAUTION CODES:</b> Assaultive/Combative						
<b>Misc IDs</b> OLN123456 (OLN) OLN123456 (OLN) OLN123456 (OLN)						
<b>SMTs AND OTHER CHARACTERISTICS:</b> Tattoo / Back						<b>INDEX ID</b> 396

**SELECT PERSON ADDRESS**  
126 North 750 West IN - Residence - Latest

### Complainant Details

Select Myself as Officer Select Officer

**OFFICER**  
Christine Saur(Badge #: SAUR111) - District 42, Versailles

**Comments**

**COMMENT**

Update

**Arrests**

**Incidents** Select Incident(s)

**Location Details** Quick Search Select Location

**Offenses** Add Offense Select Offense(s)

**Attachments** View External Attachments Add Attachment

**Attached Forms** Add Form -Select-

Go Back

With Online RMS version 11.5 and higher, certain fields are set as required or disabled and the available **Hearing Type** list of values changes based on the selected **Complaint Type**.

Examples:

- If **Complaint Type** = *Arrest*, then **Charge Type**, *Hearing Type* and *Threat Type* list of values become disabled to not allow entry.
- If **Complaint Type** = *Warrant*, then **Charge Type** and **Hearing Type** list of values becomes disabled to not allow entry and **Threat Type** becomes required.

**Note:** Configurations for required and disabled fields are managed by Caliber Admins. If your agency uses Criminal Complaints and would like to use these configurations, please contact Caliber Public Safety Support.

If the Criminal Complaint is associated with a Field Arrest, the **Arrest Tracking Number** displays as read-only. The label could show **Arrest Tracking Number**, or **OBTN**, depending on your agency's configuration.

The screenshot shows a 'Complaint Details' form with the following fields:

- CRIMINAL COMPLAINT NUMBER:** 20COMP0056
- DATE AND TIME:** 06/16/2020 1149
- SUBMISSION STATUS:** (dropdown menu)
- SUBMISSION STATUS DATE AND TIME:** (text field)
- COURT:** -Select- (dropdown menu)
- COURT CASE NUMBER:** (text field)
- CHARGE TYPE:** Only Misdemeanors (dropdown menu)
- OBTN:** (text field, highlighted with a red box)

4. **Select Person Address** from the available choices.
5. Select **Officer** under the Complainant Details section.

The select officer link displays a dialog listing all officers on associated arrests and incidents for quick selection.

You can quickly select any officer associated to the incidents and arrests identified on the criminal complaint record.

Click **Select Myself as Officer** to set the officer as yourself, click **Select Officer** to select an officer from an associated record, or type in the auto-complete field to add any other officer.

Only one officer can be chosen.

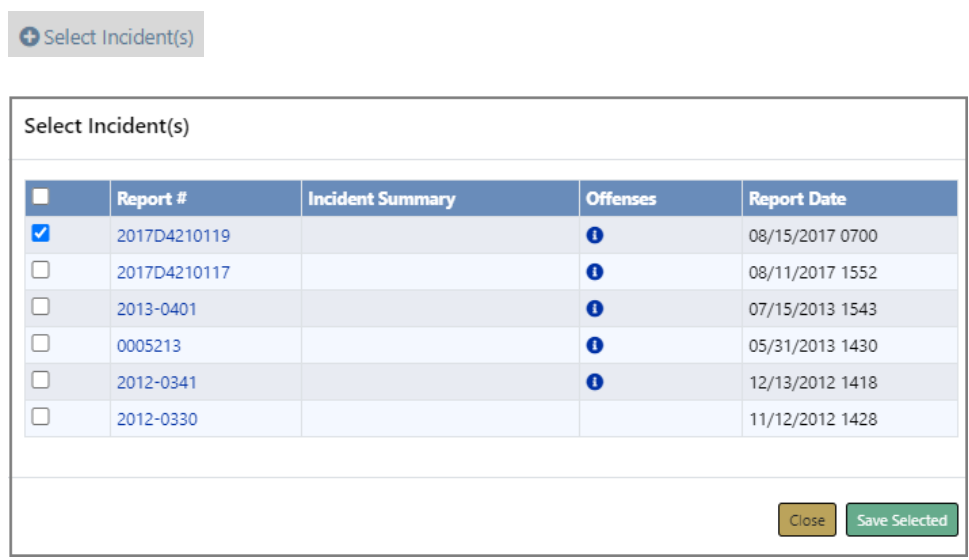
6. Enter any **Comments**.
7. Make any necessary updates in the available fields near the top of the form, then click the **Update** button to save your changes.

8. Page down to view *Arrests* associated with the Criminal Complaint, if any. This grid is read-only and is populated when the complaint is created via the arrest.

For more information on arrests, refer to “Field Arrest Overview” on page 291.

9. If applicable, click the **Select Incident(s)** link to associate *Incidents* with the Criminal Complaint.

**Note:** The **Select Incident(s)** link only displays if there are incidents where the person on the complaint is the offender.



- a. **Select** the applicable Incidents.
- b. Click the **Save Selected** button to associate the selected Incidents with the Criminal Complaint.



If there is an arrest associated with the incident where the arrestee is the complaint defendant, Online RMS adds the arrest to the complaint. If that arrest has an OBTN, the OBTN is also added to the complaint.

10. If applicable, click **Select Location** then select from the displayed list, or use **Quick Search** to pick any address.

**Note:** The **Select Location** link only displays if there are associated incidents.

11. Click **Add Offense** or **Select Offense(s)** to include at least one Offense.

- a. If you choose **Add Offense**, an *Add Offense* dialog box appears.

Add Offense

**CHARGE CODE**  
35-43-2-1 B01 BURGLARY- AIRPORT test (35-43-2)

**OFFENSE DATE**  
11/05/2020

**OFFENSE TIME**  
1930

**CITATION #**  
Quick Select

**COMMENTS**  
Test Offense

Close Save

Enter the **Charge Code**, **Offense Date**, **Offense Time**, **Citation #**, and **Comments** where applicable.

Click **Save**.

**Note:** If you enter a charge code that is associated with **Tokens**, additional token fields appear. These tokens submit with each charge if the complaint is submitted to the court.


- b. If you choose **Select Offense(s)**, a list appears of offenses that are on the associated Incidents.


Select Offense(s)

<input type="checkbox"/>	Offense Code	Description	Offense Date
<input checked="" type="checkbox"/>	35-43-2-1 B08	BURGLARY- BUILDING	08/14/2017 1122

Close Save Selected

**Check** each Offense you wish to include, then click **Save Selected**.

- 12. If applicable, click on the Edit icon  to update any **Court Case** that may be associated to the Criminal Complaint.

Court Case ID	Court Case Number	Status	Filed Date	Actions
23		Filed	06/16/2020 1149	

For general information about Court Case, refer to “Court Case Overview” on page 269.

For more information on updating a Court Case, refer to “Edit Court Case” on page 273.

**13. Optionally, add any Attachments**

For more information on adding Attachments, refer to "Add Attachments" on page 59.

**14. If Applicable for your agency, optionally attach a custom form by selecting from the list under the Attached Forms section.**

a. Once you select a custom form, the form opens. Complete the necessary information then click **Save** or **Save and Exit**.

**15. If applicable, click on the Print button on the top right to print the Criminal Complaint record. A PDF file downloads to your local machine.**

**16. Click the Submit For Approval button on the top right, whenever you are ready to submit the Criminal Complaint for approval.**

For more information, refer to “Submit Criminal Complaint for Approval” on page 265.

## View a Criminal Complaint

To view a **Criminal Complaint** record follow these steps:




**1. Search** for the Criminal Complaint record you want to view or access it from **Recent Activities** on your home page.

For instructions on how to search refer to “Criminal Complaint Search” on page 253.

For instructions on accessing from Recent Activities refer to "Criminal Complaint Overview" on page 251.

**2. In the Search Results grid, click the View icon  on the record you want to view.**



Criminal Report Number	Date/Time	Agency	Complaint Type	Person	Status	Submission Status	Actions
20COMP0056	06/16/2020	District 42, Versailles	Warrant	JONES, WILLIAMS	Initial		  

3. The *View Criminal Complaint* form opens.


Criminal Complaint Search / Criminal Complaint Search Results / [View Criminal Complaint](#)

Go Back Print Submit for Approval

**Complaint Details**

CRIMINAL COMPLAINT NUMBER 20COMP0056	DATE AND TIME 06/16/2020 1149	STATUS Initial	STATUS DATE AND TIME 06/16/2020 1209
SUBMISSION STATUS	SUBMISSION STATUS DATE AND TIME	COMPLAINT TYPE Warrant	COMPLAINT AGENCY District 42, Versailles
COURT	COURT DOCKET NUMBER	HEARING TYPE	THREAT TYPE Flight Risk
CHARGE TYPE Only Misdemeanors	OBTN	IS JUVENILE No	

**Person Details** [View Person Details](#)

LAST NAME JONES	FIRST NAME WILLIAMS	DOB 03/03/1965 (Age: 55)	SEX Male	RACE White	ETHNICITY Not Hispanic or Latino	
DRIVER'S LICENSE # OLN123456	DRIVER'S LICENSE STATE Alaska	ALIASES Willy (Alias), WILLIAMTWO JONES(Alias), WILLIAM JONES(Alias)			E-MAIL testme@gmail.com	(2/4) 09/12/2012
ADDRESS (RESIDENCE) 126 North 750 West IN						
HEIGHT 5' 11"	WEIGHT 185	PLACE OF BIRTH United States of America	CITIZENSHIP United States of America	EMPLOYER NAME A1A Car Wash123		
CAUTION CODES: Assaultive/Combative						
Misc IDs OLN123456 (OLN) OLN123456 (OLN) OLN123456 (OLN)						
SMTs AND OTHER CHARACTERISTICS: Tattoo / Back						INDEX ID 396

**PERSON ADDRESS**  
126 North 750 West IN

**Complainant Details**

**OFFICER**  
Christine Saur #SAUR111

**Comments**

**COMMENT**

**Incidents**

Report #	Incident Summary	Offenses	Report Date
2017D4210119		<b>1</b>	08/15/2017 0700


Arrests that are associated with the Criminal Complaint appear in a grid near the bottom, similar to Incidents.


*View Criminal Complaint* is read-only.

For instructions on editing, refer to “Edit a Criminal Complaint” on page 258.

- Optionally, click the **Print** button to print, if applicable; a PDF file downloads to your machine.



- Optionally, click on the Incident **Report #** link or the view icon , if applicable, to open the Incident Report associated to the **Criminal Complaint**.

Report #	Incident Summary	Offenses	Report Date
2017D4210119			08/15/2017 0700

- Click the **Submit For Approval** button to submit the **Criminal Complaint** for approval.

For more information, refer to “Submit Criminal Complaint for Approval” on page 265.

## Submit Criminal Complaint for Approval

You can submit a **Criminal Complaint** record for approval two ways:

- From the *View Criminal Complaint* form.
- From the *Edit Criminal Complaint* form.

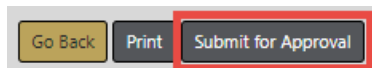
To submit for approval, follow these steps:

- Access the *View* or *Edit Criminal Complaint* form.

For instructions on viewing, refer to “View a Criminal Complaint” on page 263.

For instructions on editing, refer to “Edit a Criminal Complaint” on page 258.

- Click on the **Submit for Approval** button on the top right of the form.



- A message appears when more information is needed before you can submit the request. If this message does not appear, continue to the next step.

Message From RMS

The complaint cannot be submitted without the following required fields:

At Least One Charge is Required

**Note:** The content of the message box varies, as it is based on missing information. (i.e., One charge code required, DOB required, etc.)

- a. Make note of the needed corrections, then click **OK**
- b. *Edit* the **Criminal Complaint** record to include the missing information.  
For instructions, refer to “Edit a Criminal Complaint” on page 258. You can then submit for approval from the *Edit Criminal Complaint* page after you have made the appropriate corrections.

4. If the **Arrest Tracking Number (OBTN)** is blank, then a message box appears informing you that this number is required to submit for approval.

Answer **Yes** to generate the number.

5. Online RMS sets the **Criminal Complaint** status to *Pending Approval* and it generates a *Criminal Complaint Approval Request* notification to users with the role configured for the notification type.

Count	Notification Type	Last Notification	Priority
107	Gang Alert	06/19/2020 11:25 AM CST	Urgent
3	CRIMINAL COMPLAINT APPROVAL REQUEST	06/18/2020 03:20 PM CST	High
16	DISAPPROVED INCIDENT REPORT	06/11/2020 11:32 AM CST	Urgent

**Note:** After submitting for approval, and if you have *Review* permissions, Online RMS immediately displays the *Edit Complaint* screen with the **Approve/Disapprove** buttons allowing for self-approval. If you also have *Submit* permissions and your agency is configured for court submissions, the **Approve & Submit** button displays.

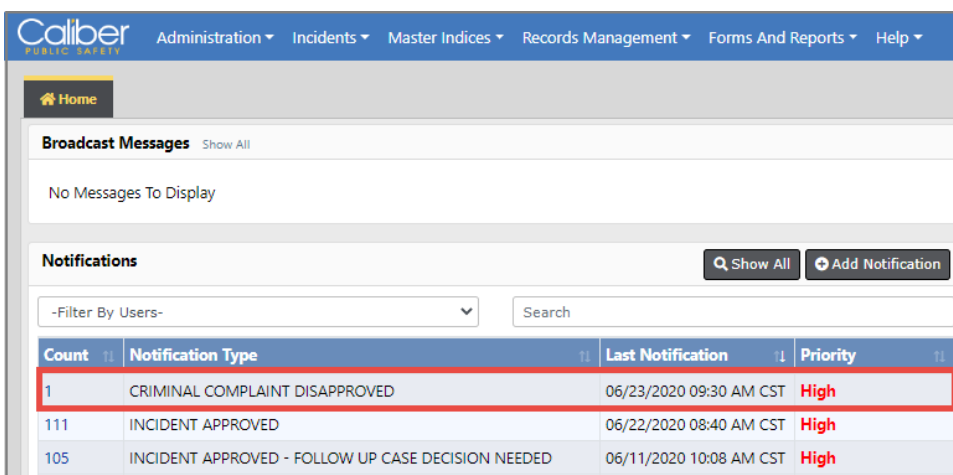
- If the complaint is **Disapproved**, Online RMS generates a notification to the creator of the Criminal Complaint. The creator has the option to resubmit for approval. For more information, refer to “Take Action on Disapproved Notifications” on page 267.
- If the complaint is **Approved**, Online RMS creates a Court Case automatically, providing your agency has the Court Case module turned on. For more information on Court Cases, refer to “Court Case Overview” on page 269.
- If the approved complaint data is **Submitted** to the court and is **successful**, the *Submission Status* on the Criminal Complaint changes to *Submitted* automatically.

- If the approved complaint data is **Submitted** to the court and is **unsuccessful**, the *Submission Status* on the Criminal Complaint changes to *Submission Error* automatically. You can review and update the Criminal Complaint as needed, then resubmit. For more information on court submissions, refer to “Approve or Disapprove Criminal Complaint” on page 367.

For information on the approval process, refer to “Approve or Disapprove Criminal Complaint” on page 367.

## Take Action on Disapproved Notifications

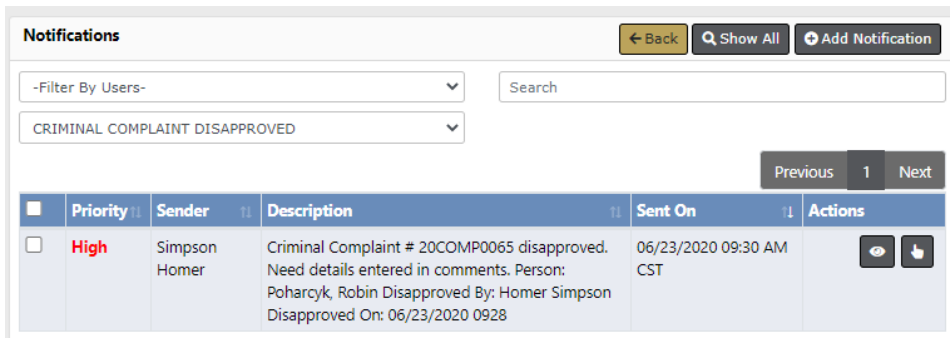
If the supervisor *Disapproves* your *Criminal Complaint Request for Approval*, Online RMS generates and sends you a **Disapproved** notification.




For more information on Notifications refer to "Notifications" on page 21.

Follow the steps below take action on the notification:

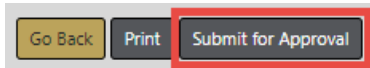
1. Click on the **Count** in the first column of the notification grid to view the *Criminal Complaint Disapproved* list. There is only one in this example.



2. Click the **Select icon**  on the Criminal Complaint record to open *Edit Criminal Complaint*.
3. Review and make the appropriate changes, then click the **Update** button.

For instructions on editing, refer to “Edit a Criminal Complaint” on page 258.

4. Click on the **Submit for Approval** button on the top right of the form.



For more information on submitting for approval, refer to “Submit Criminal Complaint for Approval” on page 265.

# Chapter 15. Court Case

## Court Case Overview

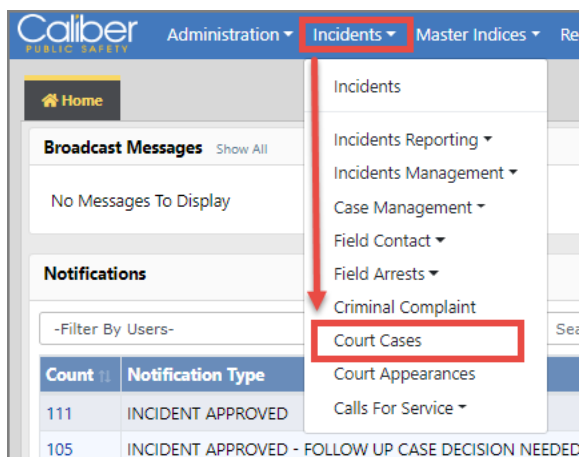
The **Court Case** module allows users, with appropriate permissions, to create and manage court cases against arrestees and offenders.

## Accessing the Court Case Module

The **Court Case** module must be turned on for the agency, and users with appropriate permissions can access it using various methods.

### Standalone Module

To access the standalone **Court Case** standalone module, select the **Court Cases** option from the *Incidents* drop-down menu.



For information on searching for a **Court Case**, refer to “Court Case Search” on page 270

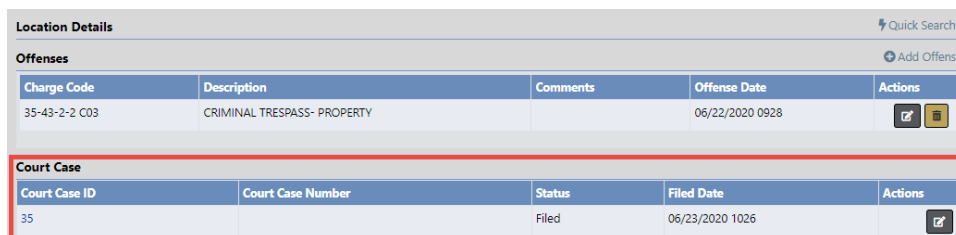
## From the Criminal Complaint



You can access **Court Cases** that are associated with Criminal Complaints.

1. Access the appropriate Criminal Complaint.


For more information on accessing, refer to “Criminal Complaint Overview” on page 251.


2. On the Criminal Complaint record, page down to the **Court Case** section.



Location Details					Quick Search
Offenses					Add Offense
Charge Code	Description	Comments	Offense Date	Actions	
35-43-2-2 C03	CRIMINAL TRESPASS- PROPERTY		06/22/2020 0928	 	

Court Case				
Court Case ID	Court Case Number	Status	Filed Date	Actions
35		Filed	06/23/2020 1026	

3. Click the **Court Case ID** link to view the record, or click the **Edit icon**  to update the Court Case record.

For more information on updating the **Court Case** record, refer to “Edit Court Case” on page 273.

## Court Case Search

To search **Court Cases** follow these steps:

1. Access the standalone *Court Case* module. For instructions, refer to “Court Case Overview” on page 269.
2. A *Court Case Search* window appears.

**Note:** You can click on the **Add Court Case** button to add a **Court Case**. For more information, refer to “Court Case Add” on page 272

3. Enter the search **criteria** into the fields provided. The more criteria you use, the shorter the results list.
4. Click the **Search** button to display the search results.

Court Case ID	Court Case Number	Filed Date	Agency	Status	Person	Person Role	Actions
1	DMM123	04/15/2020 1450	District 42, Versailles	Active	Smith, Joe		

You can, with appropriate permissions, view, edit, and delete **Court Case** records from the results window.

- Click on the **View icon** to view. For more information on viewing, refer to
- Click on the **Edit icon** to edit. For more information on editing the **Court Case**, refer to .
- Click on the **Delete icon** to delete, enter a **Comment** at the prompt to explain why you are deleting it, then click **Delete**.

## Court Case Add

There are two ways to add a Court Case:

- Through the standalone Court Case module.
- Through the Criminal Complaint module, if your agency has the module turned on.
  - The Court Case is created automatically from the Criminal Complaint when it is approved. The information from the Criminal Complaint pulls into the Court Case record automatically.

For more information on Criminal Complaint, refer to “Criminal Complaint Overview” on page 251.

To add a **Court Case** record follow these steps:

1. Access the standalone *Court Case* module. For instructions, refer to “Court Case Overview” on page 269.
2. The *Court Case Search* screen appears. Before adding the court case, it is recommended you first search for the court case record to verify whether or not it already exists, though not required. For instructions on how to search refer to “Court Case Search” on page 270.
3. Click on the **Add Court Case** button on the *Court Case Search* screen.

The screenshot shows the 'Court Case Search' interface. At the top right, there are two buttons: 'Go Back' and 'Add Court Case'. The 'Add Court Case' button is highlighted with a red rectangular box. Below the buttons are several input fields: 'COURT CASE ID', 'COURT CASE #', 'AGENCY' (with a dropdown menu showing 'Indiana State Police'), 'STATUS' (with a dropdown menu showing '-Select-'), 'FILED DATE FROM', and 'FILED DATE TO' (both with calendar icons).

4. The *Add Court Case* screen appears.

The screenshot shows the 'Add Court Case' screen. At the top, there is a breadcrumb trail: 'Court Case Search / Add Court Case'. Below this, the 'Add Court Case' form is displayed. It includes fields for 'COURT CASE NUMBER', 'FILED DATE AND TIME' (with a calendar icon), 'STATUS' (with a dropdown menu showing '-Select-'), and 'AGENCY' (with a dropdown menu showing 'District 42, Versailles'). There is also a 'COMMENTS' text area. At the bottom of the form, there are two buttons: 'Go Back' and 'Save'.

5. Enter the appropriate information in the fields provided.



6. Click **Save**.
7. The *Edit Court Case* screen appears.

Court Case Search / Edit Court Case

Go Back

**Court Case Details**

COURT CASE ID	COURT CASE NUMBER	FILED DATE AND TIME	STATUS
38		06/25/2020 1004	Active

**AGENCY**

District 42, Versailles

**COMMENTS**

This is a test court case record

Update

**People** + Add Person

**Officers** + Add Officer

**Arrests** + Add Arrest

**Incidents** + Add Incident

**Reference Numbers** + Add Reference Number

**Court Appearances** + Add Court Appearance

**Attachments** View External Attachments + Add Attachment

Go Back

8. Optionally, make the necessary changes in the fields provided on the top section of the screen, then click **Update**.
9. Optionally, add other data to the **Court Case**, such as People, Officers, Arrests, Incidents, Reference Numbers, Court Appearances, and Attachments.

For more information, refer to “Edit Court Case” on page 273.

## Edit Court Case

To edit a **Court Case** record follow these steps:

1. Access the **Court Case** record you want to edit.

You can access the record by searching for the **Court Case**, or by accessing the Criminal Complaint record to which a **Court Case** is associated.

For more information on the different methods of accessing the **Court Case**, refer to “Court Case Overview” on page 269.

- After selecting the appropriate **Court Case**, the *Edit Course Case* opens.

- Click the **Select People** or **Add Person** link to add one or more people to the Court Case.



**Note:** The Person grid only shows a **Select People** link if there are associated incidents.



### Select People:

- Choose the appropriate people from the list that appears.

Select People			
<input type="checkbox"/>	Person Name	Incident Role	Incident Report #
<input type="checkbox"/>	DUSTIN ARNEY	Victim	2020D4210270
<input type="checkbox"/>	Christopher Evans	Other Person	2020D4210270
<input checked="" type="checkbox"/>	Charles Brown	Other Person	2020D4210270
<input type="checkbox"/>	Steve Buschemy	Witness	2020D4210271
<input type="checkbox"/>	Carol Burnette	Witness	2020D4210271

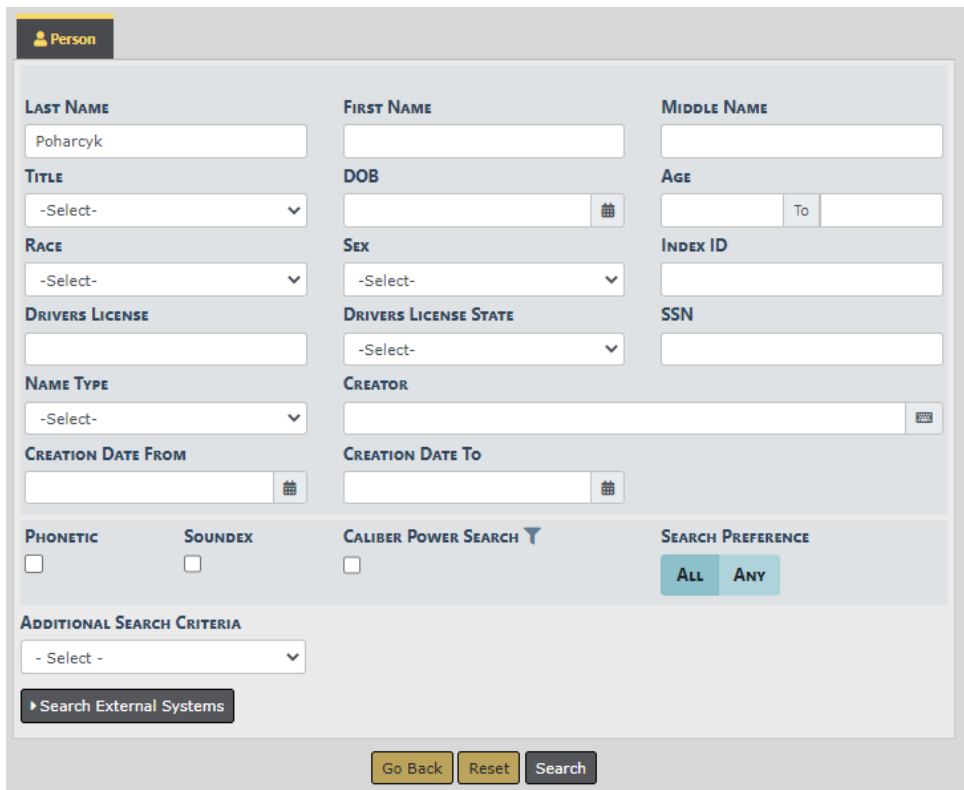
- Click **Save Selected**.

- c. The people you added now appears under the *People* section of the *Edit Court Case* screen.

With appropriate permissions, you can edit  the person record, or delete  it from the **Court Case**. Deleting does not delete the person record itself, it removes the association only.

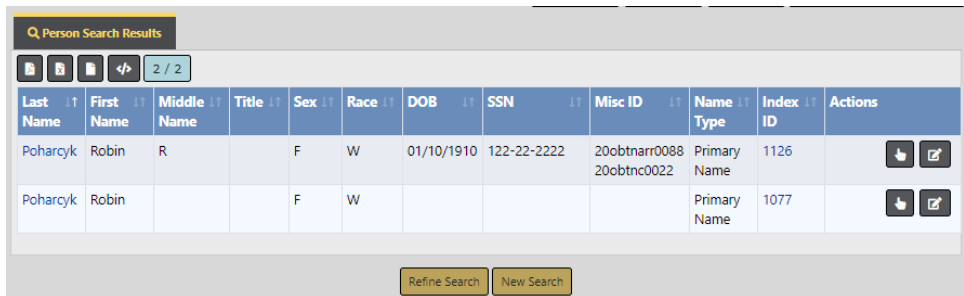
**Add Person:**

- a. The *Person Search* screen appears.







The form is titled "Person" and contains several input fields and dropdown menus. The fields are organized into a grid. At the bottom, there are checkboxes for "PHONETIC", "SOUNDEX", and "CALIBER POWER SEARCH", along with "SEARCH PREFERENCE" buttons for "ALL" and "ANY". An "ADDITIONAL SEARCH CRITERIA" dropdown is also present. At the very bottom, there are "Go Back", "Reset", and "Search" buttons.

- b. Enter the search criteria, then click **Search** to display the search results.



The table shows search results for "Person Search Results". It has columns for Last Name, First Name, Middle Name, Title, Sex, Race, DOB, SSN, Misc ID, Name Type, Index ID, and Actions. There are two rows of results for "Poharcyk, Robin".

Last Name	First Name	Middle Name	Title	Sex	Race	DOB	SSN	Misc ID	Name Type	Index ID	Actions
Poharcyk	Robin	R		F	W	01/10/1910	122-22-2222	20obtnarr0088 20obtnrc0022	Primary Name	1126	 
Poharcyk	Robin			F	W				Primary Name	1077	 

- c. Click the **Select icon**  on the appropriate person record to add the person to the **Court Case**.

**NOTE:** If the person you want to add to the **Court Case** does **not** exist in your search, with appropriate permissions you can add the master person to Online RMS, then add that person to the **Court Case**.

For more information on master indices, refer to "Master Indices Overview" on page 71.

For more information on searching master records, refer to "Searching Master Records" on page 75.

For more information on adding a master person index record, refer to "Adding Person" on page 85.

- d. After selecting the appropriate person, the **Add Person** screen appears.

Court Case Search / Edit Court Case / Person Search / Person Search Results / Add Person

**Person Details**



LAST NAME	FIRST NAME	MIDDLE NAME	DOB	SEX	RACE
Poharcyk	Robin	R	01/10/1910 (Age: 110)	Female	White
ETHNICITY	SSN	ADDRESS (RESIDENCE)			INDEX ID
Unknown	122-22-2222	123 Main Street Mount Desert, ME 04662			1126

**SELECT PERSON ROLE**

Defendant

Go Back Save

- e. Select the **Person Role** for that person.
- f. Click **Save**.
- g. The person now appears under the *People* section of the *Edit Court Case* screen.


With appropriate permissions, you can edit  the person record, or delete  it from the **Court Case**. Deleting does not delete the person record itself, it removes the association only.

- 4. Optionally, add other data, such as Officers, Arrests, Incidents, Reference Numbers, Court Appearances, and Attachments.

**Note:** For more information on Court Appearances, refer to “Court Appearances Overview” on page 281.

## View Court Case




To view a **Court Case** record follow these steps:

- 1. **Search** for the Court Case record you want to view. For instructions on how to search refer to “Court Case Search” on page 270.
- 2. In the *Search Results* grid, click the **View icon**  on the record you want to view.

Court Case Search / Court Case Search Results

Refine Search New Search

1 result(s) found

Court Case ID	Court Case Number	Filed Date	Agency	Status	Person	Person Role	Actions
1	DMM123	04/15/2020 1450	District 42, Versailles	Active	Smith, Joe		  

Refine Search New Search

3. The *View Court Case* form opens.

Court Case Search / Court Case Search Results / View Court Case

Go Back

**Court Case Details**

<b>COURT CASE ID</b> 1	<b>COURT CASE NUMBER</b> DMM123	<b>FILED DATE AND TIME</b> 04/15/2020 1450	<b>STATUS</b> Active
<b>AGENCY</b> District 42, Versailles	<b>COMMENTS</b> testing		

**People**

Person Details	Role
<b>Name:</b> Susan Marie Smithson <b>Sex:</b> Female <b>Race:</b> White	
<b>Name:</b> Joe Smith <b>Sex:</b> Male <b>Race:</b> White	

**Arrests**

Arrest #	Arrest Date	Agency	Charges	Last Name	First Name
2003602	03/10/2020 1351	District 42, Versailles	CRIMINAL TRESPASS- AUTO	Smithson	Susan

**Court Appearances**

Court Appearance ID	Type	Appearance Date / Time	Status	Reason	Officers
19	OFFICER	05/14/2020 1410	Active	REASON 1	Brandon Pangle 8888a District 42, Versailles
2	OFFICER	04/15/2020 1436	CWOF	REASON 2	Charles Livingwell 2014 District 42, Versailles

*View Court Case* is read-only. For instructions on editing, refer to “Edit Court Case” on page 273.

4. Optionally, click on the person name, Arrest ID, Court Appearance ID, etc., to view details.

**People**

Person Details		Role
1	Name: Susan Marie Smithson Sex: Female Race: White	
1	Name: Joe Smith Sex: Male Race: White	

**Arrests**

Arrest #	Arrest Date	Agency	Charges	Last Name	First Name
2003602	03/10/2020 1351	District 42, Versailles	CRIMINAL TRESPASS- AUTO	Smithson	Susan

**Court Appearances**

Court Appearance ID	Type	Appearance Date / Time	Status	Reason	Officers
19	OFFICER	05/14/2020 1410	Active	REASON 1	Brandon Pangle 8888a District 42, Versailles
2	OFFICER	04/15/2020 1436	CWOF	REASON 2	Charles Livingwell 2014 District 42, Versailles





# Chapter 16. Court Appearances

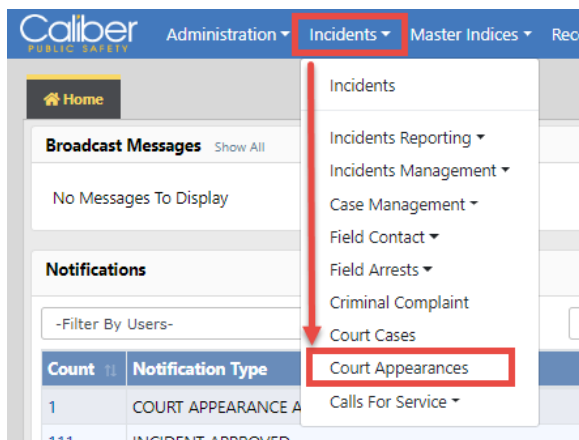
## Court Appearances Overview

**Court Appearances** are added through the Court Case module. A Court Appearance cannot exist without a Court Case.

### Accessing Court Appearances

#### *From the Incidents Top Menu*

Select **Court Appearances** from the *Incidents* drop-down menu.



You must have *Manage Court Appearances* permissions to see the **Court Appearances** option on the list.

The *Search Court Appearances* form opens. Search for and select the Court Appearance record.

For information on searching **Court Appearances**, refer to “Court Appearances Search” on page 284.










## From the Court Case

**Court Appearances** are associated to Court Cases.

1. Access the appropriate Court Case.

For more information on accessing Court Cases, refer to “Court Case Overview” on page 269.

2. On the Court Case record, page down to the **Court Appearances** section.

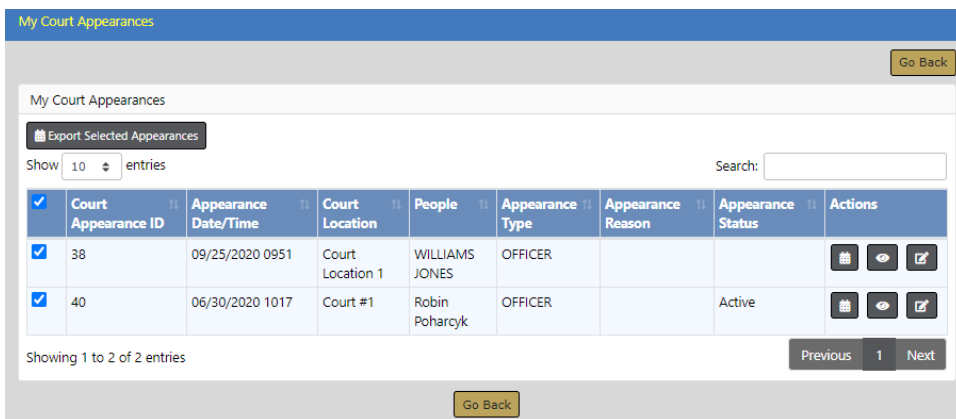
Court Appearances							Add Court Appearance
Court Appearance ID	Type	Appearance Date / Time	Status	Reason	Officers	Actions	
14	OFFICER	02/01/2020 1409			Christian (osuper) Fred Gordmanson Badge #: 200 District 21, Toll Road - SC	  	
31	OFFICER	09/05/2020 1153	Active		Charles Livingwell Badge #: 2014 District 42, Versailles	  	
18	OFFICER	07/01/2020 1800	Dismissed	REASON 1	Charles Livingwell Badge #: 2014 District 42, Versailles Brandon Pangle Badge #: 8888a District 42, Versailles	  	

## From Recent Activities

For your convenience, you can quickly open a list of your upcoming **Court Appearances** from *Recent Activities* on your Home Page.

Recent Activities	
Initial Report	25
Pending Approval	4
My Cases (Active Count)	3
My Case Activities (Active Count)	3
Evidence Review	8
Open Field Arrests	7
Arrests Pending Release	11
My Court Appearances	2
Forms For Review	36

1. Click on **My Court Appearances** under *Recent Activities*.



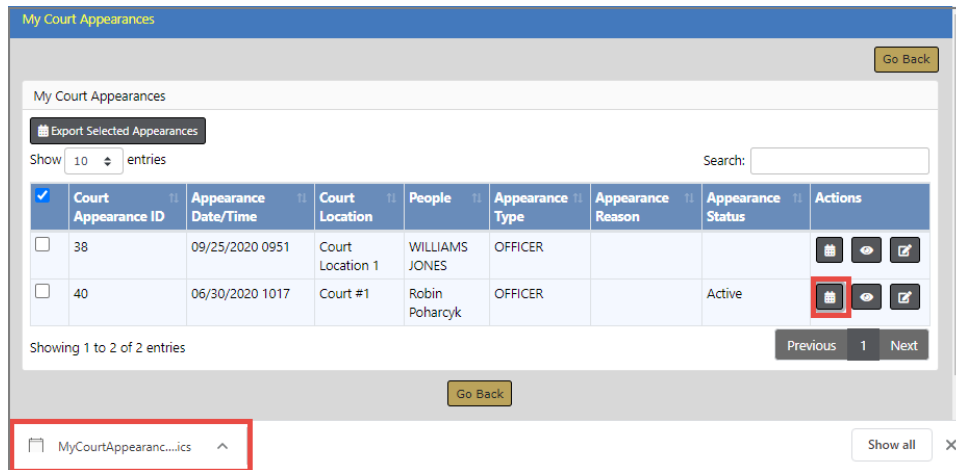
- 2. Click the View icon to view the Court Appearance as read-only. For more information on viewing, refer to “View Court Appearances” on page 289.
- 3. Click the Edit icon to update the Court Appearance. For more information on updating, refer to “Court Appearances Edit” on page 287.

You must have *Manage Court Appearances* permissions to edit **Court Appearances**.

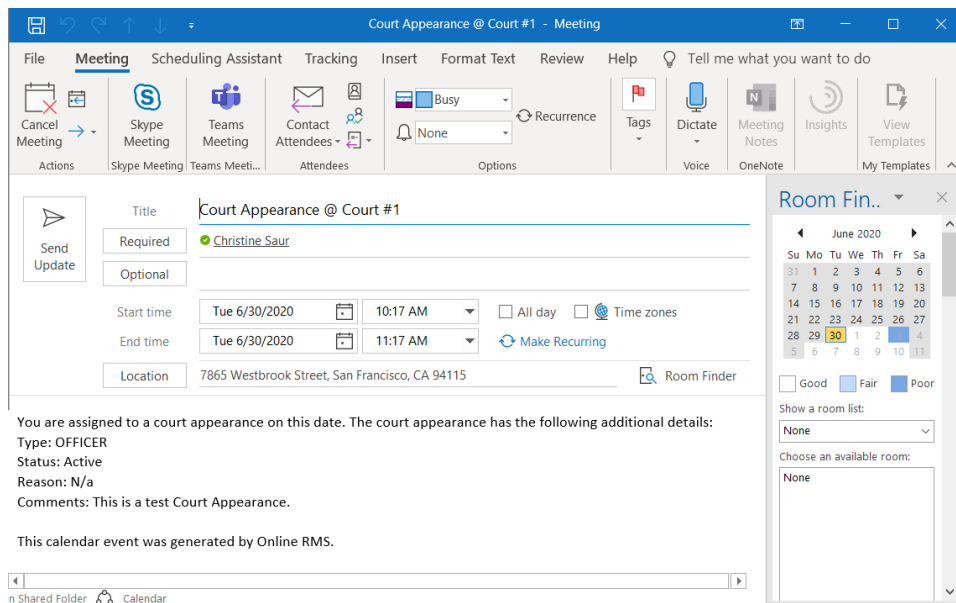
- 4. Optionally, add the Court Appearance to your **calendar**. You can add multiple to your calendar at once, or one at a time.
  - a. For **multiple** Court Appearances, **check** all that apply, then click **Export Selected Appearances** to download all selected schedules to one ics file.



OR, for **one** Court Appearance, click the **calendar** button to download an *ics file* for that specific Court Appearance.



- b. **Right click** on the downloaded *ics* file to open the meeting notice.



- c. Update the notice if needed, then click **Send Update** to add it to your calendar.

**NOTE:** You must remove the notice from your calendar manually once it is added.

## Court Appearances Search

To search **Court Appearances** follow these steps:

1. On the top menu bar, click **Incidents**, then **Court Appearances**. For instructions, refer to “Court Appearances Overview” on page 281.

2. A *Court Appearance Search* window appears.

3. Enter the search **criteria** into the fields provided. The more criteria you use, the shorter the results list.

4. Click the **Search** button to display the search results.

Court Appearance ID	Court Case Number	Appearance Date	Agency	Type	Reason	Status	Officers	Case Defendants	Actions
38		09/25/2020 0951	District 42, Versailles	OFFICER			Christine Saur Badge #: SAUR111	WILLIAMS JONES	

You can, with appropriate permissions, view or edit **Court Appearance** records from the results window.

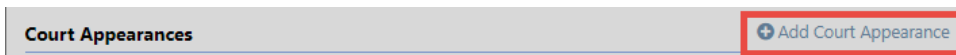
- Click on the **View icon** to view. For more information on viewing, refer to “View Court Appearances” on page 289.
- Click on the **Edit icon** to edit. For more information on editing, refer to “Court Appearances Edit” on page 287.

## Court Appearances Add

Court Appearances are associated to Court Cases.

To add a **Court Appearance** to a Court Case, follow these steps:

1. Access the standalone Court Case module. For instructions, refer to “Court Case Overview” on page 269.
2. The *Court Case Search* screen appears. Search for and select the appropriate Court Case record. For instructions on how to search refer to “Court Case Search” on page 270 .
3. On the Court Case record, page down to the Court Appearances section, then click **Add Court Appearance**.



4. The Court Case opens in edit mode, with an *Add Court Appearance* section.

The screenshot displays the "Add Court Appearance" form within a web application. At the top, a breadcrumb trail reads: "Court Case Search / Court Case Search Results / Edit Court Case / Add Court Appearance".

**Court Case Details**

COURT CASE ID	COURT CASE NUMBER	FILED DATE AND TIME	STATUS
38		06/25/2020 1004	Active

**AGENCY**: District 42, Versailles  
**COMMENTS**: This is a text court case record

**PEOPLE**  
Name: Robin R Poharczyk Sex: Female Race: White DOB: 01/10/1910 (Age:110)

**Add Court Appearance**

APPEARANCE DATE / TIME	TYPE	STATUS	REASON
<input type="text"/>	-Select-	-Select-	-Select-

**COMMENTS**

**Court Location**  
 Select Court Location  Specify Court Location

**COURT LOCATION**  
-Select-

COURT NAME 2	ADDRESS	ADDRESS 2
<input type="text"/>	<input type="text"/>	<input type="text"/>

CITY	STATE	ZIP	PHONE
<input type="text"/>	-Select-	<input type="text"/> - <input type="text"/>	<input type="text"/>

**COMMENT**

**Officers** + Add Officer

Officer	Actions
<input type="text"/>	<input type="text"/>


Buttons: Go Back, Save

5. Enter the appearance **Date/Time** and **Type**
6. Optionally, select the **Status** and **Reason**, and enter **Comments**.
7. For the **Court Location**, choose one of the following:
  - a. **Select Court Location** - to choose a court location from a drop down list. The address populates automatically for you. This option is selected by default.
  - b. **Specify Court Location** - to manually enter the address.
8. Optionally, enter a **Comment** for the Court Location.
9. Click the **Add Officer** link to add at least one officer. Either a list of officers on the Court Case appears from which you choose, or you can enter an officer, whichever applies.
10. Click **Save** to save the Court Appearance to the Court Case.

## Court Appearances Edit

You must have *Manage Court Appearances* permissions to edit **Court Appearances**.

To edit a **Court Appearance**, follow these steps:

1. Search for the Court Appearances record, from the standalone module or from the Court Case. For more information, refer to “Court Appearances Overview” on page 281.
2. Click on the Edit icon  to open the *Edit Court Appearance* form, with the Court Case Details shown at the top as read-only.

Court Appearance Search / Court Appearance Search Results / [Edit Court Appearance](#)

[Go Back](#)

### Court Case Details

COURT CASE ID	COURT CASE NUMBER	FILED DATE AND TIME	STATUS
23		06/16/2020 1149	Filed

AGENCY	COMMENTS
District 42, Versailles	

**PEOPLE**

**Name:** WILLIAMS JONES **Sex:** Male **Race:** White **DOB:** 03/03/1965 (Age:55) **Role:** Defendant

### Edit Court Appearance

**COURT APPEARANCE ID**  
38

**APPEARANCE DATE / TIME** 09/25/2020 0951

**TYPE** OFFICER **STATUS** -Select- **REASON** -Select-

**COMMENTS**

### Court Location

Select Court Location  Specify Court Location

**COURT LOCATION**  
Court Location 1

**COURT NAME 2** Alternate Name

**ADDRESS** 101 Webster St. **ADDRESS 2** Room #345

**CITY** Bloomington **STATE** Colorado **ZIP** 11111 - 2222 **PHONE** 292-111-1111

**COMMENT**  
On 3rd floor

[Go Back](#) [Update](#)

### Officers

[+ Add Officer](#)

Officer	Actions
Christine Saur Badge #: SAUR111 District 42, Versailles	

**Attachments** [View External Attachments](#) [+ Add Attachment](#)


3. Make any necessary changes in the fields provided. For more information on the available fields, refer to “Court Appearances Add” on page 285.
4. Click the **Update** button to apply your changes.
5. Optionally, click the **Add Officer** link to add an officer, then click **Save**.



- Optionally, **Add Attachments**.

## View Court Appearances

To view a **Court Appearance** as read-only, follow these steps:

- Search for the Court Appearances record, from the standalone module or from the Court Case. For more information, refer to “Court Appearances Overview” on page 281.
- Click on the **View** icon  to open the *View Court Appearance* form, with the Court Case Details shown at the top.

Court Appearance Search / Court Appearance Search Results / View Court Appearance Go Back

---

**Court Case Details**

<b>COURT CASE ID</b> 23	<b>COURT CASE NUMBER</b>	<b>FILED DATE AND TIME</b> 06/16/2020 1149	<b>STATUS</b> Filed
<b>AGENCY</b> District 42, Versailles	<b>COMMENTS</b>		
<b>PEOPLE</b> Name: WILLIAMS JONES Sex: Male Race: White DOB: 03/03/1965 (Age:55) Role: Defendant			

---

**Court Appearance Details**

<b>COURT APPEARANCE ID</b> 38			
<b>APPEARANCE DATE / TIME</b> 09/25/2020 0951	<b>TYPE</b> OFFICER	<b>STATUS</b>	<b>REASON</b>
<b>COMMENTS</b>			

---

**Court Location**

<b>COURT NAME</b> Court Location 1			
<b>COURT NAME 2</b> Alternate Name	<b>ADDRESS</b> 101 Webster St.	<b>ADDRESS 2</b> Room #345	
<b>CITY</b> Bloomington	<b>STATE</b> Colorado	<b>ZIP</b> 11111 - 2222	<b>PHONE</b> (292)-111-1111
<b>COMMENT</b> On 3rd floor			

---

**Officers**

<b>Officer</b> Christine Saur SAUR111 District 42, Versailles
--

Go Back

Changes cannot be made to the data on this form while in view mode. For instructions on updating the data, refer to “Court Appearances Edit” on page 287.



# Chapter 17. Field Arrest

## Field Arrest Overview

The **Field Arrest** module can be used to document the necessary information associated with an arrest. Once you select a person from the **Master Indices** or create a new person record, you can edit the **Field Arrest** information. The **Field Arrest** can stand alone or it can be associated to an Incident Report.

Beginning with Online RMS 11.4.0, you can add a **Criminal Complaint** associated to a **Field Arrest**, providing you have the appropriate permissions and the feature is turned on.

**Hunger Camera** integration allows Online RMS to send a message to a virtual camera on our local machine, then receive pictures back and post to the Online RMS *Master Person Index* record.

**Livescan** integration transmits the most recent arrest and arrestee information from the *Master Person Index* to **LiveScan**.

## Recent Activities

Certain **Field Arrest** links appear under Recent Activities on your Home page. The below example shows two examples.

Recent Activities	
Initial Report	28
Pending Approval	2
My Cases (Active Count)	3
My Case Activities (Active Count)	3
Evidence Review	8
Open Field Arrests	7
Arrests Pending Release	13

For more information about Recent Activities, refer to "Home Page " on page 8.

## Open Field Arrests




Click on the link to view a list of arrests that are open. You can then edit a **Field Arrest** that appears on the list.


## Field Arrests Pending Release

Agencies using Field Arrests and having a **Disposition** configured with a **Status Code** of *Complete Without Release*, displays an **Arrests Pending Release** link under Recent Activities.

Click on the link to view a list of arrests that are pending release.



Arrest #	Arrest Date	Last Name	First Name	Placement	Placement Date	Actions
2009657	09/23/2020 1123	Henry	James	Jail 1	10/29/2020 1220	
2009652	09/17/2020 1114	Thomas	Max	Jail 1	10/29/2020 1310	
1706559	06/01/2017 0200	Potter	Harry	Jail 2	06/01/2017 0230	

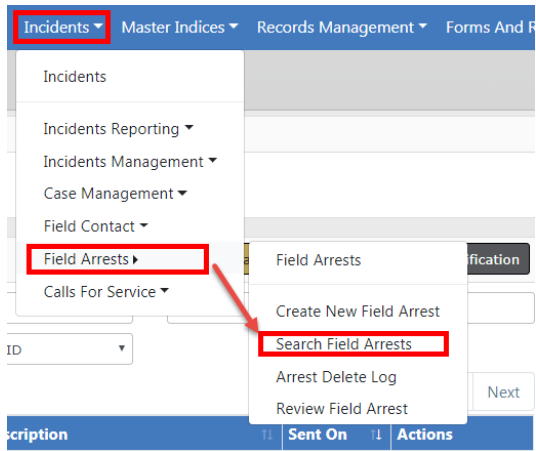
Click on the release icon  on the right to release the Field Arrest to open the *Release Field Arrest* form.

On the *Release Field Arrest* form, change the **Disposition** to *Released*, then click the **Update Disposition** button.

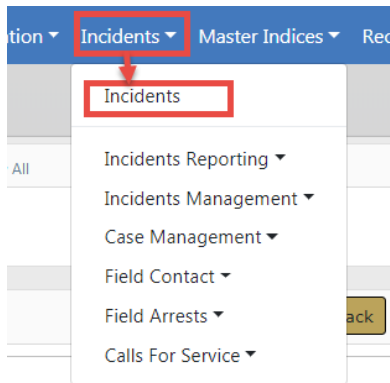
## Search Field Arrests

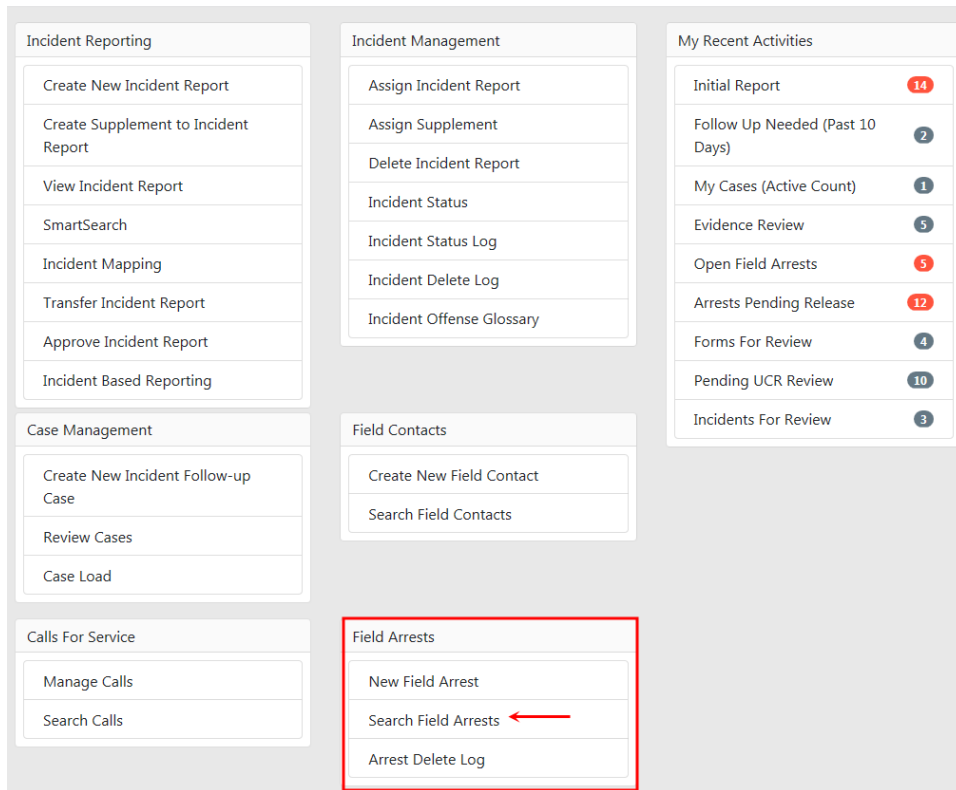
To view or edit an existing **Field Arrest** you must first **Search** for the record. There are two ways to search, either method will open the *Search Field Arrests* screen:

- Click on the **Incidents** drop-down menu on the top *Navigation Bar*, click on **Field Arrests**, then **Search Field Arrests**.



- Or, click the **Incidents** label on the top Navigation Bar, click Incident on the sub-menu, then click the **Search Field Arrests** link.





After choosing one of the two search methods, the *Field Arrest Search* screen appears. Enter the search criteria then click **Search** to display the *Search Results*. Click the **Reset** button to clear the entered criteria if you wish to start over.

The search form includes the following fields:

- LAST NAME:** jones
- FIRST NAME:** william
- SSN:** [Empty]
- RACE:** --Select--
- SEX:** --Select--
- DOB:** [Empty]
- AGE:** [Empty] To [Empty]
- ARREST DATE FROM:** [Empty]
- ARREST TIME FROM:** [Empty]
- ARREST DATE TO:** [Empty]
- ARREST TIME TO:** [Empty]
- ARREST #:** [Empty]
- AGENCY:** --All Agencies--
- REFERENCE #:** [Empty]
- REFERENCE # TYPE:** --Select--
- STATUS:** --Select--
- REVIEW STATUS:** --Select--
- PLATE #:** [Empty]
- WARRANT REFERENCE #:** [Empty]
- INCIDENT REPORT #:** [Empty]
- CHARGE CODE:** [Empty]
- INDEX ID:** [Empty]

**Officer:**

- FIRST NAME:** [Empty]
- LAST NAME:** [Empty]
- BADGE #:** [Empty]
- ROLE:** --Select--

**ADDITIONAL SEARCH CRITERIA:** --Select--

Buttons: Go Back, Reset, Search



From the *Search Results* window, you have the ability to export the search results to various file types using the four icons directly above the *Search Results* grid. For more information on exporting search results refer to "Export Search Results" on page 31.

Click the **Arrest Number** link to view the *Field Arrest*, click the **Edit** icon to update the *Field Arrest*, or click the **Delete** icon to delete.

For more information on editing the **Field Arrest** refer to [FieldArrestEdit.htm](#).

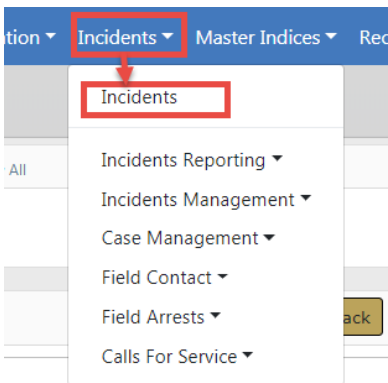
For more information on deleting a **Field Arrest** refer to "Delete Field Arrest" on page 328.

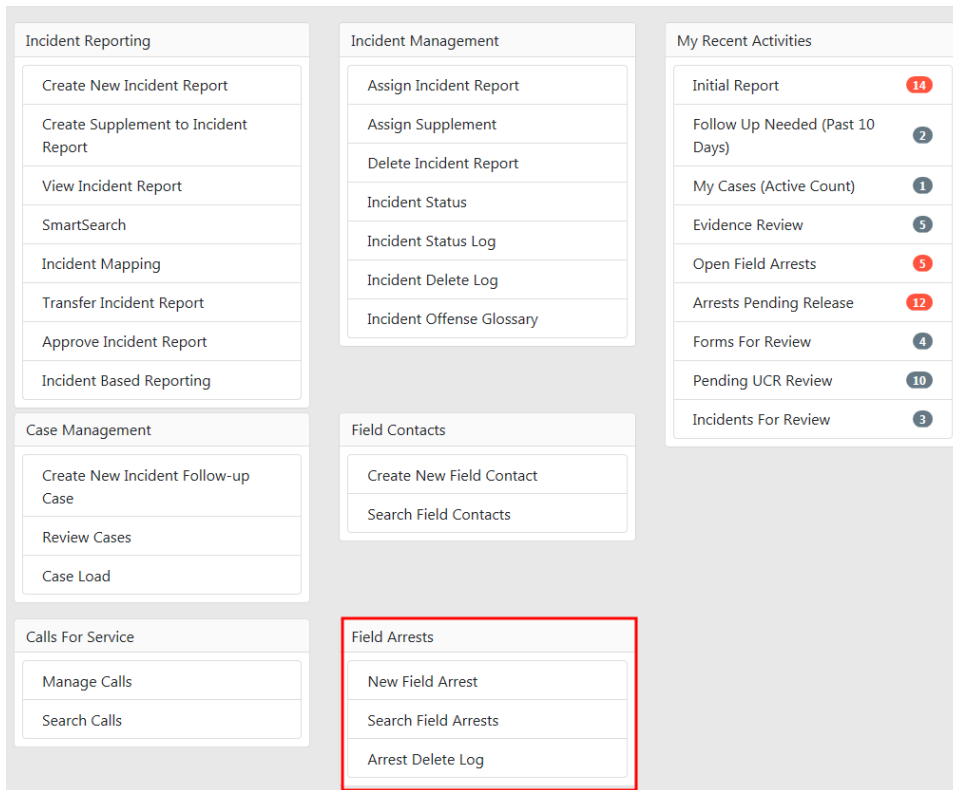
**NOTE:** The **Edit** and **Delete** icons are available if you have proper permissions to perform that action. Refer to your administrator for more information on permissions.

Click the **Refine Search** button to return to the *Field Arrest Search* form to update the criteria you initially entered, or click **New Search** to enter new criteria.

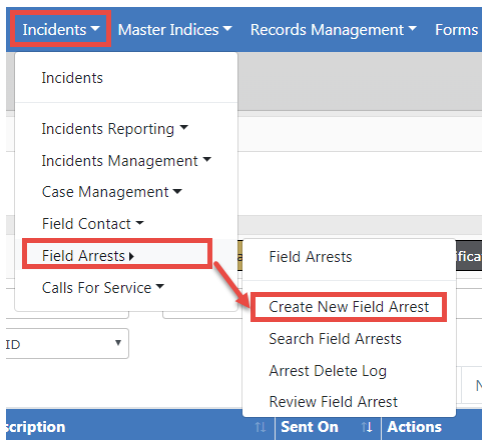
## Add Field Arrest

To create a new **Field Arrest**, select *New Field Arrest* from either the Incidents menu or the Incident drop-down on the top Navigation Bar.






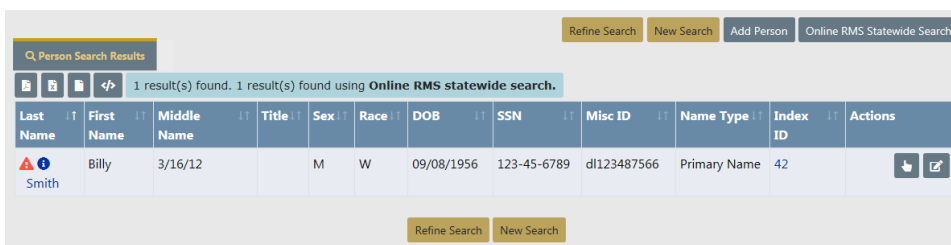
OR



1. The **Person Search** screen opens. This searches through the *Master Person Index* records to locate existing records that match your entered criteria.
2. Search for the person or use the **Add Person** button on the upper right to add the person.



- Once the *Person Search Results* screen appears, use the **Select** icon  to select the correct person.



From the *Person Search Results* window, you have the ability to export the search results to various file types using the four icons directly below the *Search Results* tab.

For more information on exporting search results refer to "Export Search Results" on page 31.

For more information on searching *Master Person Index* records, refer to "Master Indices" on page 71.

- When you have selected the person you are taken to the **Add Field Arrest** module.

- Verify the information under *Person Information* to be accurate. Enter the **Arrest Date** and **Time**, **PBT**, and **Comments**.
- Click the **Edit Person** link to add or update person information.


- Click the **Save** button after updates are complete to return to the *Add Field Arrest* screen.
- Click the **Save** button on the *Add Field Arrest* screen to save the entered data. The *Edit Field Arrest* screen opens.

For more information on editing a Field Arrest, refer to "Edit Field Arrest" below.

## Edit Field Arrest

The *Edit Field Arrest* screens allows you to enter details of the **Field Arrest**.

The screenshot displays the 'Edit Field Arrest' interface. At the top right, there are buttons for 'Go Back', 'Duplicate', 'Print', and 'Transmit Livescan'. Below these are links for 'Minimize', 'View Person', 'Edit Person', and 'Change Person'. The main form contains the following fields:

LAST NAME Smith	FIRST NAME Billy	MIDDLE NAME 3/16/12	DOB 09/08/1956 (Age at Time of Arrest: 62 Years Old)	SEX Male	RACE White	
ETHNICITY Hispanic or Latino	DRIVER'S LICENSE # DL123487566	DRIVER'S LICENSE STATE Virginia	SSN 123-45-6789	Hide and unhide person information		
ALIASES SmithNWesson (Nickname)						
RESIDENCE PHONE (333)-333-3333	ADDRESS (RESIDENCE) 654 East PERRY Street Block of Apartment #13A VERSAILLES, IN 58965			HEIGHT 6' 01"	WEIGHT 185	
EYE COLOR Black	HAIR COLOR Black	COMPLEXION Light Brown				
MISC IDS DL123487566 (OLN)					INDEX ID 42	

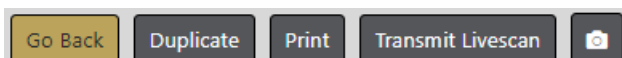
Below the form are 'Previous Section' and 'Next Section' buttons. A navigation bar shows counts for various sections: Arrest, Arrestee Information, Officers (1), Associated Events (1), Location (1), Charges / Warrants (0), Names (2), Property (0), Vehicle / Towing (1), Narratives (1), Attachments (0), Questions, Validations, and Log.

The 'Arrest Information' section includes:

ARREST NUMBER	ARRESTING AGENCY	CREATOR NAME	CREATOR DATE
1902593	District 42, Versailles	Saur, Christine	02/05/2019 1443

There are action buttons on the top right of the *Edit Field Arrest* screen.

**Note:** Certain buttons may not be visible, depending on your agency's configuration.



- Go back** - Return to the previous screen.
- Duplicate** - Duplicate the Arrest record for each Arrestee systematically to avoid duplicate manual entry.

For more information, refer to “Duplicate Field Arrest” on page 325.

- **Print** - After the **Field Arrest** form is complete, you can print a *Field Arrest Report* from this page.

For details, refer to “Print Field Arrest” on page 330.

- **Camera** - After the Arrest record is complete, take a photo using *Hunter Camera*. Depending on your agency's configuration, there may be one or multiple cameras from which to choose.

One: 

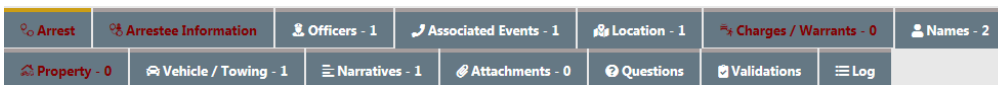
Multiple: 

For details on using the camera software, refer to “Hunter Camera” on page 735.

- **Transmit Livescan** - After the Arrest record is complete, transmit the most recent physical description and the person images associated with that physical description to LiveScan.

For details on using the LiveScan software, refer to “LiveScan” on page 737.

Individual tabs located in the center of the *Edit Field Arrest* screen organize the **Field Arrest** details.



You may wish to minimize the *Person Information* box so it is easier to go through your report. Do this by selecting **Minimize** at the top of the screen.

1. Give the **Field Arrest** a *Disposition*: Based on what is selected, there are additional boxes that need to be completed:

**Disposition**

---

DISPOSITION

---

PLACEMENT COUNTY

---

RELEASED DATE

**Disposition**

DISPOSITION  
Released

RELEASED DATE

- Click the **Add Reference** link to add a Reference Number in the *Add Reference Number* window if applicable.

**Reference Numbers** + Add Reference

- Enter the appropriate Reference information and click the **Save** button.

Add Reference Number

REFERENCE TYPE  
Court Case #

REFERENCE #  
253625

Cancel Save

- Optionally, click the **Add Criminal Complaint** link to add a criminal complaint, if applicable. This option appears providing you have the appropriate permissions and the feature is turned on.

**Criminal Complaints** + Add Criminal Complaint

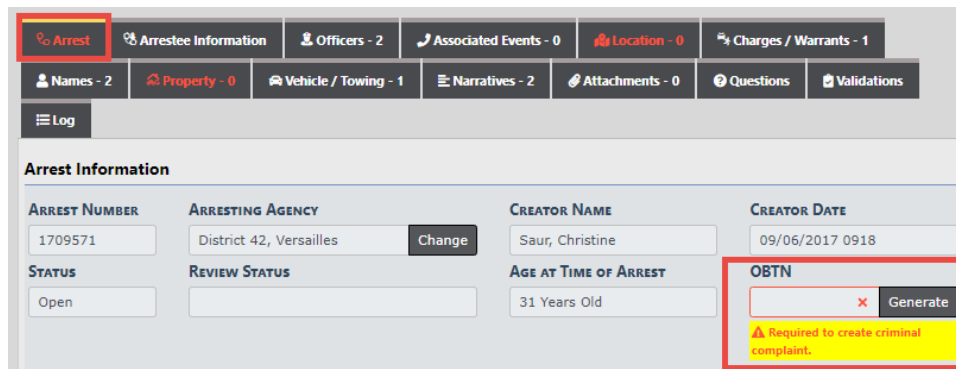
- If you receive a **OBTN** required message, click **OK**, then page-up on the Field Arrest to the **OBTN**(Offender Based Tracking Number for criminal complaints).

**Note:** The label **OBTN** could appear as **Arrest Tracking Number** for your agency. This label is configurable by agency.

Message From RMS

OBTN required to create criminal complaint.

OK



The screenshot shows the 'Arrest Information' form in the Caliber Public Safety interface. The 'Arrest' tab is active. The form contains the following fields and values:

ARREST NUMBER	ARRESTING AGENCY	CREATOR NAME	CREATOR DATE
1709571	District 42, Versailles	Saur, Christine	09/06/2017 09:18

Below these are additional fields:

STATUS	REVIEW STATUS	AGE AT TIME OF ARREST	OBTN
Open		31 Years Old	<input type="text"/> <input type="button" value="Generate"/>

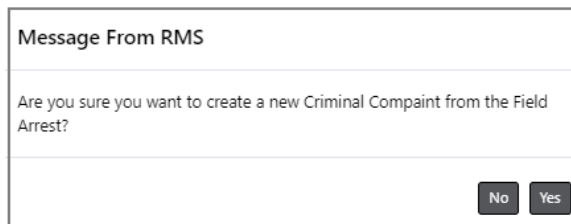
A yellow warning message is displayed below the OBTN field: "Required to create criminal complaint."

Enter or **Generate** the OBTN number, depending on how your administrator configured the OBTN number.

**Note:** The functionality of this field is configurable by agency. Your agency has the option to have users enter or generate the number.

**Page-down** and click **Add Criminal Complaint** after entering or generating the OBTN number.

- b. A new *Criminal Complaint confirmation* box appears, asking if you are sure you want to create a new one.



Message From RMS

Are you sure you want to create a new Criminal Complaint from the Field Arrest?

- c. Click **Yes** to create the Criminal Complaint record and open the *Edit Criminal Complaint* form.

Recent Activities (Open Field Arrests) / Edit Field Arrest / Edit Criminal Complaint

Go Back Print Submit for Approval

### Complaint Details

CRIMINAL COMPLAINT NUMBER 20COMP0054	DATE AND TIME 06/15/2020 1525	STATUS Initial	STATUS DATE AND TIME 06/15/2020 1525
SUBMISSION STATUS	SUBMISSION STATUS DATE AND TIME	COMPLAINT TYPE Arrest	COMPLAINT AGENCY District 42, Versailles
COURT	COURT CASE NUMBER	HEARING TYPE	THREAT TYPE
CHARGE TYPE	<b>OBTN</b> 20OBTNARR0023	Is JUVENILE	

### Person Details

LAST NAME ARNEY	FIRST NAME DUSTIN	DOB 10/10/1985 (Age: 34)	SEX Male	RACE Unknown	DRIVER'S LICENSE # 1360099593
DRIVER'S LICENSE STATE Indiana	ADDRESS (RESIDENCE) 8230 HARRIS Road POLAND, IN 47868		HEIGHT 5' 08"	WEIGHT 234	
EYE COLOR Brown	EMPLOYER NAME A School				
MISC IDs 20OBTNARR0023 (OBTN) 1360099593 (OLN)				INDEX ID 355	

SELECT PERSON ADDRESS  
8230 HARRIS Road POLAND, IN 47868 - Residence - Latest

### Complainant Details

OFFICER  
Christine Saur(Badge #: SAUR111) - District 42, Versailles

### Comments

COMMENT

Update

The OBTN number appears on the form as read-only as shown above.

### Arrests

Arrest #	Arrest Date	Agency	Charges	Last Name	First Name
1709571	09/06/2017 0700	District 42, Versailles	UTILITY/TRANSPORTATION- AIRCRAFT- OPERATE INTOXICATED/HEALTH DISORDER	ARNEY	DUSTIN

### Incidents



Select Incident(s)

### Location Details

Quick Search Select Location

### Offenses

Add Offense

Charge Code	Description	Comments	Offense Date	Actions
8-21-4-8	UTILITY/TRANSPORTATION- AIRCRAFT- OPERATE INTOXICATED/HEALTH DISORDER		09/06/2017 0000	 

### Court Case

Go Back

The Arrestee, Arresting Officer, Location, and Offenses from the Field Arrest pulls into the Criminal Complaint form automatically as shown above.

- d. Make the appropriate changes on the *Edit Criminal Complaint* and click the **Update** button.


For more information on editing the Criminal Complaint, refer to “Edit a Criminal Complaint” on page 258.

- Optionally, click the **Print** button to print the Criminal Complaint. A PDF file downloads to your local machine.
- Optionally, click the **Submit for Approval** button to submit the Criminal Complaint for approval.

For more information on submitting for approval, refer to "Submit Criminal Complaint for Approval" on page 265

**Note:** When the Criminal Complaint is approved, the approval process creates a Court Case automatically, providing your agency has the Court Case module turned on. For more information on Court Case, refer to “Court Case Overview” on page 269.

- e. You are taken back to the *Edit Field Arrest* screen. **Page down** to see the Criminal Complaint associated with the Field Arrest.

Criminal Complaints					
Compliant Number	Person Name	Date	Status	Submission Status	Actions
20COMP0066		06/24/2020 1150	Initial		

- 5. Click **Next Section** on the *Edit Field Arrest* screen to navigate to *Arrestee Information* tab, or click on the *Arrestee Information* tab.

**NOTE:** Each tab has a **Next Section** link that advances you to the next tab. Or you may click on the individual tabs to navigate between tabs manually.

The data elements on this tab will directly update the Arrestee's master person information

**⚠ Caution Codes** + Add Caution Code

---

**~ Aliases** + Add Alias

Last Name	First name	Middle	Title	DOB	SSN	Type	Date Of Info	Actions
	SmithNWesson					Nickname	03/01/2017	
Smith	Billy	3/16/12		09/08/1956	123-45-6789	Primary Name	03/16/2012	

---

**👤 Physical Descriptions** + Add Physical Description

Ht	Wt	Eye Color	Hair Color	Hair Style	Facial Hair	Hair Length	Build	Skin Color	Age	Glass	Date of Info	Actions
6'01"	185	Black	Black			Short	Slight	Light Brown		No	11/21/2016	

---

**📄 SMTs and Other Characteristics** + Add SMT

---

**📍 Addresses** + Add Address

Address	Type	Occupied	Comments	Date of Info	Actions
654 East PERRY Street Block of Apartment #13A VERSAILLES, IN 58965	Residence	-		02/21/2017	

---

**📞 Phone Numbers** + Add Phone Number

Number	Type	Date Of Info	Actions
(333)-333-3333	Residence	03/17/2017	

---

**🏢 Employment** + Add Employment

---

**🎓 Education** + Add Education

6. Click on the individual **Add** buttons to enter the necessary *Arrestee Information*.

For example, click on **Add Physical Description** to add the Arrestee's physical description.

**👤 Physical Descriptions** + Add Physical Description

Ht	Wt	Eye Color	Hair Color	Hair Style	Facial Hair	Hair Length	Build	Skin Color	Age	Glass	Date of Info
----	----	-----------	------------	------------	-------------	-------------	-------	------------	-----	-------	--------------

**Physical Description**

<p><b>HEIGHT</b></p> <p>-Select- * -Select-</p>	<p><b>WEIGHT</b></p> <p><input type="text"/></p>
<p><b>EYE COLOR</b></p> <p>-Select-</p>	<p><b>HAIR COLOR</b></p> <p>-Select-</p>
<p><b>FACIAL HAIR</b></p> <p>-Select-</p>	<p><b>HAIR LENGTH</b></p> <p>-Select-</p>
<p><b>BUILD</b></p> <p>-Select-</p>	<p><b>SKIN COLOR</b></p> <p>-Select-</p>
<p><b>HAIR STYLE</b></p> <p>-Select-</p>	<p><b>GLASSES</b></p> <p><input type="checkbox"/></p>
<p><b>AGE</b></p> <p>62</p>	<p><b>DATE OF INFO</b></p> <p>03/13/2019</p>

+ Populate From Most Recent
Cancel
Save



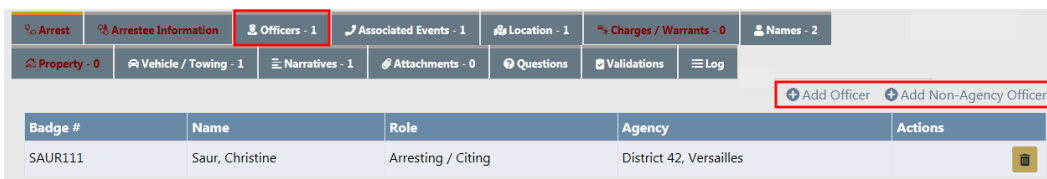
- a. If arresting a previously known person you can import the existing **Physical Description** from the *Master Person* record. Click on the **Populate From Most Recent** button to populate the data from the most recent *Master Person* record.
- b. Update fields as needed.
- c. Click **Save**, or click **Cancel** to return to *Edit Field Arrest* screen without adding a **Physical Description**.
- d. Continue adding all other necessary information.

**NOTE:** **Citizenship** under the **Birth Place** section is required. If **Country** is blank, it defaults to the same value as **Citizenship**. If needed, you can select a different Country than Citizenship.

7. Click **Next Section** on the *Edit Field Arrest* screen, or click on the **Officers** tab.

## Officer

Ensure the information is correct on the **Officers** tab.



The **Field Arrest** accommodates multiple officers with different roles.

1. Click the **Add Officer** link to add officers to the **Field Arrest**.

Add Officer

---

**OFFICER**

Officer Joe Hedges(Badge #: 7049) - All Other

**ROLE**

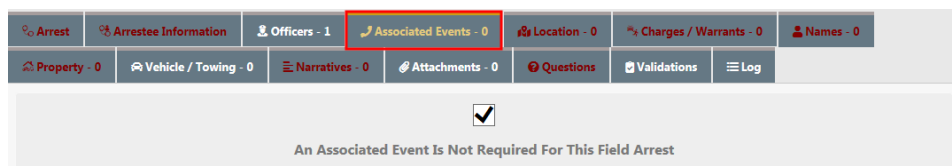
Assisting

2. Choose the appropriate **Officer** and associated **Role**, then click **Save**.
3. The added officer then appears in the **Officer** tab of the Field Arrest record.

The **Add Non-Agency Officer** link appears for multi-tiered agencies. With the proper permissions assigned by your administrator, this button allows you to assign officers from outside of your agency. For more information see your administrator.

## Associated Events

This tab gives you the option to associate an **Incident** or **Calls for Service** to this **Field Arrest**. To waive the option, check the **An Associated Event Is Not Required For This Field Arrest** box.



The screenshot shows a navigation bar with several tabs: Arrest, Arrestee Information, Officers - 1, Associated Events - 0 (highlighted with a red box), Location - 0, Charges / Warrants - 0, and Names - 0. Below this, there is a secondary row of tabs: Property - 0, Vehicle / Towing - 0, Narratives - 0, Attachments - 0, Questions, Validations, and Log. Below the tabs, there is a checkbox that is checked, and the text "An Associated Event Is Not Required For This Field Arrest" is displayed below it.

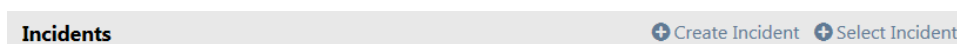
If you want to associate an **Incident** or **Calls for Service**, leave the box unchecked. You can either *create* or *select an existing Incident*, or *select an existing Call*.

**Note:** You may assign multiple **Associated Events** to the same **Field Arrest**.

## Create Incident

Create Incident only applies if your agency allows the manual creation of incidents.

1. Select the **Create Incident** link to create an **Incident**. The *Incident Report Number and Summary* screen opens.



The screenshot shows a header bar with the word "Incidents" on the left and two buttons on the right: "+ Create Incident" and "+ Select Incident".

**Incident Report Number and Summary**

Please verify the following information and click finished to create a new incident report

**AGENCY**  
District 42, Versailles

**REPORT #**  
Auto Generated

**SECURITY LEVEL**  
Patrol Officer

**MEDIA/CRIME SUMMARY** Check Spelling

Loud arguing heard by several neighbors.

Go Back Finished - Go To Next Section

2. Enter the necessary information, then click the **Finished - Go To Next Section** button.

**Note:** Click the **Check Spelling** button to check your spelling before going to the next section if you wish.

3. The *Incident Associations* form opens.

Go Back

Incident Summary: 03/13/2019 1450 Hrs Agency: District 42, Versailles  
Offense(s): No Offense Specified Report #: 2019D4210220 Supp #: 0

Select All   
*Include individual preferences or click Select All to include all preferences*

**Incident Details**

REPORT DATE: 03/13/2019 1450 OCCURRENCE DATE FROM: 02/05/2019 1433 OCCURRENCE DATE TO:

**Location**  
1001 North East Main Street INDIANAPOLIS, IN  Include Location (Incident Location)

**Officers**

Name	Role	Actions
Saur, Christine	Reporting	<input type="checkbox"/> Include Officer
Saur, Christine	Arresting	<input checked="" type="checkbox"/> Include Officer

**Arrestee**

LAST NAME	FIRST NAME	MIDDLE NAME	DOB	SEX	RACE	Include Arrestee
Smith	Billy	3/16/12	09/08/1956 (Age: 62)	Male	White	<input checked="" type="checkbox"/>
ETHNICITY	DRIVER'S LICENSE #	DRIVER'S LICENSE STATE	SSN	[Photo] (1/1) 11/21/2016		
Hispanic or Latino	DL123487566	Virginia	123-45-6789			

4. Select the items on the *Incident Associations* form to include on **Incident Report** from the **Field Arrest**.

**Note:** Additional information can be added to the **Incident Report** later. For more information on **Incident Reports** refer to "Incidents" on page 161.

- 5. Click the **Save** button at the bottom of the screen.
- 6. The associated **Incident** appears in the **Associated Events** tab of the *Edit Field Arrest* screen.

### Select Existing Incident

- 1. Select the **Select Incident** link to associate an existing **Incident** to the **Field Arrest**. The *Incident Search* screen opens.

**Incidents** [+ Create Incident](#) [+ Select Incident](#)

Incident SmartSearch

REPORT #

REPORT TYPE

APPROVAL STATUS

SUMMARY

FOLLOW UP ACTION

STATUS / DISPOSITION

ADDITIONAL SEARCH CRITERIA

AGENCY

REPORT DATE FROM

REPORT DATE TO

OCCURRENCE DATE FROM

OCCURRENCE DATE TO

APPROVAL DATE FROM

APPROVAL DATE TO

GANG RELATED

[Go Back](#) [Reset](#) [Search](#)

- 2. Enter the **Report#** if known, otherwise enter the known information, then click the **Search** button to view the results of your search.

Q, Incident Search Results

1 result(s) found

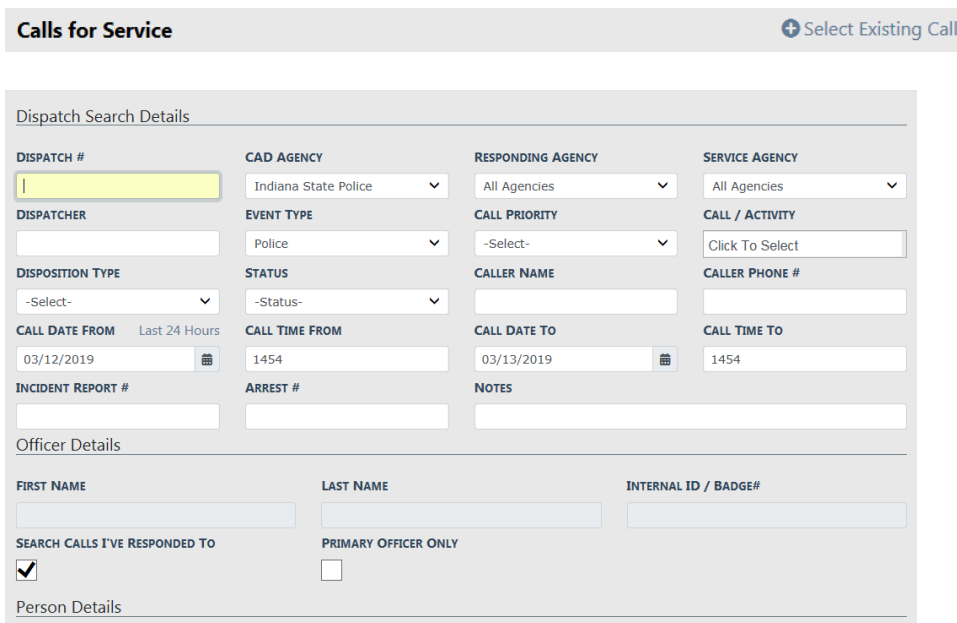
Agency	Report #	Report Date	Supp #	Summary	Actions
D42	2018D4210207	12/13/2018 1332 Hrs	0	456 Main STCT Apartment #100 Littleton, CA 12345 Offense(s): 1: 35-43-2-1 B03 - BURGLARY- ATTEMPTED	<a href="#">View</a> <a href="#">Edit</a>

[Refine Search](#) [New Search](#)

3. Click on the **Select** icon  to select the appropriate **Incident Report**. The selected report will then appear on the **Associated Events** tab of the **Field Arrest** record.


## Select Existing Call


1. Select the **Select Existing Call** link to associate an existing **Calls for Service** to the **Field Arrest**. The *Calls For Service Search* screen opens.



2. Enter the **Dispatch#** if known, otherwise enter the known information.
3. Click the **Search** button to view the results of your search.



Dispatch #	Agency	Dispatch Date	Call Type	Caller	Primary Officer	Location	Incident Report #	Actions
2018-00000373	District 34, Jasper	12/04/2018 15:48	FIRE ALARM		Patrol Officer Dana McMillan #DMM12345	1429 W US 40, GREENFIELD, IN, Hancock		 

4. Click on the **Select** icon  to select the appropriate **Calls for Service**.
5. The selected CFS then appears on the **Associated Events** tab of the **Field Arrest** record.

When you are finished adding the necessary associated events, click the **Next Section** button to advance to the *Location* tab.

## Validations on Field Arrest Imports

The **Field Arrest** can be associated to an **Incident Report**, and data from the **Field Arrest** can be imported into the **Incident Report**.

When associating a **Field Arrest** to an **Incident Report**, don't assume all of the **Field Arrest** information is automatically associated to the **Incident Report**, for this has led to improper UCR and NIBRS reporting.

If a **Field Arrest** is associated to a report, then Online RMS verifies that at least one offense from the associated **Field Arrest** was added to the **Incident Report**, if no offense was associated or added to the **Incident Report** then validation errors occur:

- Field arrest information – At least one offense from the field arrest must be included.

If a **Field Arrest** is associated to a report, then Online RMS verifies that Arrestee (person name) from the associated **Field Arrest** is added to the **Incident Report**, if no arrestee was associated or added to the **Incident Report** then validation errors occur:

- Field Arrest Information – Arrestee from field arrest must be included on report.

## Location

Add the **Location** to the **Field Arrest**. The location pulls from the **Master Address Index**. The recommendation is to always search for an existing Master Address record before adding a new one to prevent duplicates.

For details on **Master Indices** refer to "Master Indices" on page 71.



Location [Quick Search](#) [Advanced Search / Add](#)  
No Location Selected

1. Click the **Quick Search** link to open the *Quick Search* window.



You have the option to search by the street address only, or by separate fields that make up an address such as street number, street name, city, etc.

Quick Search

SEARCH TYPE  
 POSTAL  ONE LINE ← Select One Line to search by street address only

ADDRESS  
 Reset Search

Show 10 entries

Index ID	Address	Common Place Name	Actions
14	1001 North East Main Street		 

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Close Advanced Search / Add

OR

Quick Search



SEARCH TYPE  
 POSTAL  ONE LINE ← Select Postal to search by individual fields

STREET #  DIRECTION  STREET NAME  TYPE

CITY  INTERSECTING STREET NAME  INTERSECTING STREET TYPE

Reset Search

Show 10 entries

Index ID	Address	Common Place Name	Actions
14	1001 North East Main Street		 

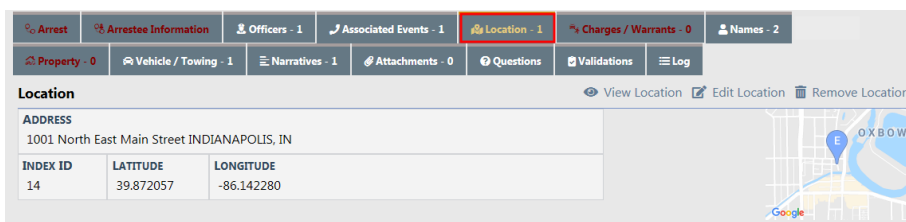
Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Close Advanced Search / Add

**Note:** If the **Location** you are looking for does not exist, click the **Advanced Search/Add** button to add it to the **Master Address Index**. For more information on adding a Master Address index record, refer to "Master Indices" on page 71.

- Click the Select icon  to select the **Location** you want to add to the Location tab of the **Field Arrest**.



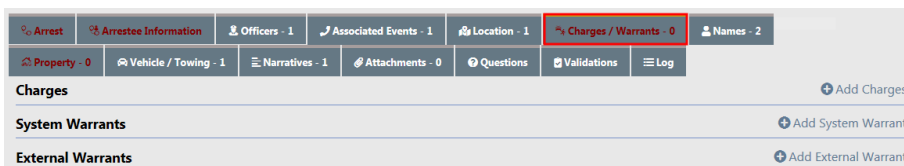
3. Click the **View Location** button to view details of that address.
4. Click **Edit Location** to change the address data, or click **Remove Location** to delete it from the **Location** tab.



Click the **Next Section** button to advance to the **Charges/Warrants** tab.

## Charges and Warrants

On this screen you have the option to **Add Charges**, **Add System Warrants**, and **Add External Warrants**.



**Note:** If there is an active *System Warrant* a red link appears to the left of **+Add System Warrant** with the person's name. Click the red link for Warrant options.

1. Click the **Add Charges** link to add the Charge.
2. For the **Charge Code** type in a portion of the offense description then select from the drop-down.

**Note:** You must enter each charge separately.



Any field with a red left-hand border is a required field. You must complete required fields to continue.

3. If the Charge is domestic related, check the **Domestic Related** box.
4. If a Charge is selected that has a default Bond Type or Amount configured for the Charge Category and Class related to the Charge Code or directly at the Charge Code level, the **Bond Amount** and **Type** automatically populates for you. You can update the Bond information as needed.
5. Click the **Add** button on the top right of the screen to add additional charges. Alternatively, you can enter the number of charges in the Add Charges text box to add a set of fields for that many charges.

6. Click the **Save** button to add the Charges to the Field Arrest.
7. Click the **Add System Warrant** and **Add External Warrant** links to add that information, if appropriate.

- a. Click **Add System Warrant** to open *Warrant Search*.

- b. **Search** for the existing Warrant, then select from the results list to add it to the Arrest.

If the Warrant does not exist, you can click on the **Add Warrant** button on the Warrant Search screen. For more information on searching or adding Warrants, refer to [WARRANTS.htm](#).

- c. Click **External Warrants** to open the *Add External Warrant* form.

- d. Enter the appropriate information, then click **Save** to add it to the Arrest.

Once you have completed all information, click the **Next Section** button to advance to the **Names** tab.

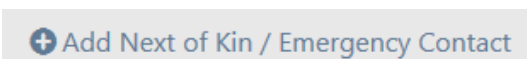
# Names

The **Names** tab contains **Next of Kin/Emergency Contacts**, **Victims**, **Other Names**, and **Organizations**.

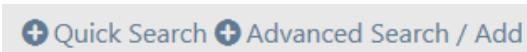
The screenshot shows the 'Names' tab interface with several sub-sections:
 

- Next of Kin / Emergency Contact**: Includes a red box around the title and a red note: "The relations here directly update the Arrestee's master person information". Below is a table with columns: Related Person, Relation, Next of Kin, EC, Dependent, Date of Info, and Actions. Two rows are visible: Fred Smith (Grandparent) and Tomaaaa Smith (Child).
- Victims**: Includes a red box around the title and a "Quick Search" link.
- Other Names**: Includes a red box around the title and "Quick Search" and "Advanced Search / Add" links.
- Other Organizations**: Includes a red box around the title and "Quick Search" and "Advanced Search / Add" links.

Click the **Add Next of Kin/Emergency Contact** link to open the *Master Person Search* screen to search for the name in the Master Indices module.



For Victim, click the **Quick Search** link to search for the name in the Master Indices module. If you do not find the name in the Master Indices, click the **Advanced Search/Add** link to add it. Use a similar process to select **Other Names** (witnesses) and **Organizations**.



For more information on searching in and adding records to the Master Indices, refer to "Master Indices" on page 71.

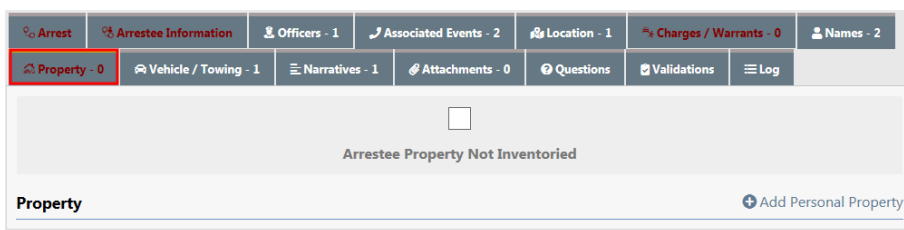
Once you have completed all information, click the **Next Section** button to advance to the **Property** tab.

# Property

The **Property** tab is applicable only when *Field Arrest Property* is setup to be used from the *Field Arrest Module Admin* page.

Enter **Property** that needs to be inventoried and belonging to the Arrestee.

If there is **no Property** to be inventoried, check the **Arrestee Property Not Inventoried** box.



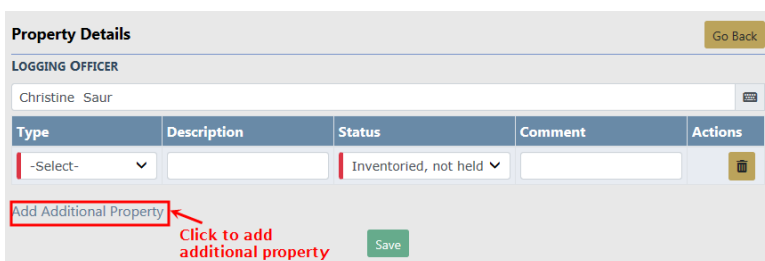
If there is **Property** to be inventoried, follow the next steps:

1. Click the **Add Personal Property** link to open *Property Details*.

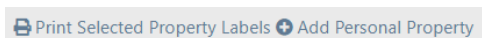


**Note:** The **Arrestee Property Not Inventoried** box must be unchecked for the **Add Personal Property** link to appear.

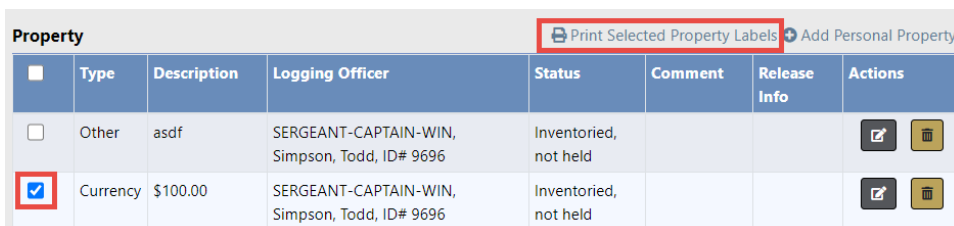
2. The *Logging Officer* defaults to the *Arresting Officer*. Make sure this information is accurate.



3. Using the Drop-downs and free text boxes, enter the appropriate description and any comments.
4. Click the **Add Additional Property** link to add additional property, if applicable
5. Click the **Save** button.
6. The **Property** appears in the grid and a **Print Selected Property Labels** link appears.

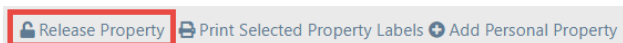


7. Select one or more property records, then click the **Print Selected Property Labels**.



8. A **FieldArrestProperty.pdf** file downloads to your machine.

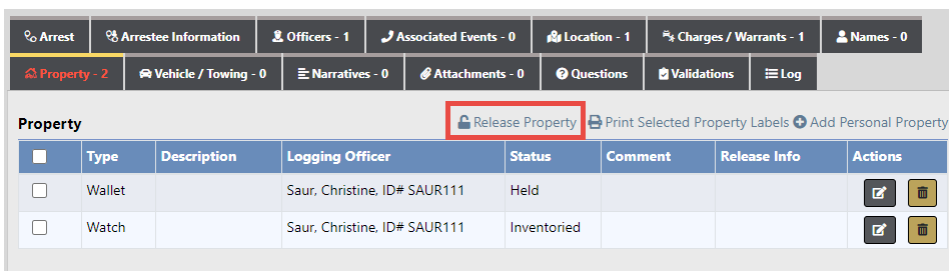
**Note:** If a **Release Property** link appears, you can click on the link to release property. For more information on releasing property, refer to "Release Property" below.



Once you have completed all information, click the **Next Section** button to advance to the **Vehicle/Towing** tab.

## Release Property

For your convenience, you can release property from the *Property* tab of the *Edit Field Arrest* page.



The link appears only if there is at least one property record that is eligible for release.

1. Click on the **Release Property** link to open the *Release Property* form listing the property that is eligible for release.

A screenshot of the 'Release Property' form. At the top right is a 'Go Back' button. Below is a table with one row selected (checkbox checked):

	Type	Description	Logging Officer	Status	Comment
<input checked="" type="checkbox"/>	Watch		Saur, Christine. ID# SAUR111	Inventoried	

Below the table are three sections:

- RELEASED TO:** Robin Poharcyk, Arrestee
- DATE RELEASED:** 11/20/2020 1025
- RELEASING OFFICER:** Christine Saur

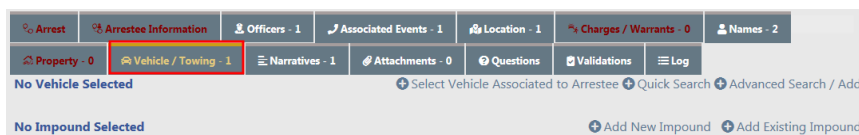
At the bottom of the form are two buttons: 'Signature' and 'Save'.

2. **Check** one or more property records you want to release. While one item appears in the example, there could be multiple.
3. Enter **Released To** and **Date Released**.
4. Select a different **Releasing Officer** or leave as the default.
5. Optionally, click the **Signature** button to sign.
6. Click **Save**.
7. The release information appears on the property record.

Property							Print Selected Property Labels	Add Personal Property
<input type="checkbox"/>	Type	Description	Logging Officer	Status	Comment	Release Info	Actions	
<input type="checkbox"/>	Wallet		Saur, Christine, ID# SAUR111	Held				
<input type="checkbox"/>	Watch		Saur, Christine, ID# SAUR111	Inventoried		<b>Released To:</b> Robin Poharcyk, Arrestee <b>Released Date:</b> 11/20/2020 1025 <b>Releasing Officer:</b> Saur, Christine, ID# SAUR111		

Notice the **Release Property** link no longer appears. In this example, there are no longer existing property records that are eligible for release; if there were, the link would still be available.

## Vehicle/Towing




The **Vehicle** must exist in the *Master Index* module before you can associate it to an Arrestee. With the proper permissions, you can add it to the *Master Vehicle Index* if it doesn't exist. For more information about the *Master Index* module, refer to "Master Indices" on page 71.

### Associate a Vehicle





You can associate a vehicle to the Arrestee three ways:

- **Select Vehicle Associated to Arrestee**

Click the **Select Vehicle Associated to Arrestee** link, if available, to add a **Vehicle** associated with the Arrestee. This link appears only when at least one vehicle is linked to the person listed as the Arrestee.



Click the **Select** icon  to select the vehicle you want to associate with the Arrestee.


Index ID	VIN	Year	Make	Model	Actions
46	SAFG651AS32165ETR651	1999	CHEVROLET(CHEV)	MONTE CARLO	 
180	ER54TY65WE98	2012	MERCEDES-BENZ(MERZ)		 

Showing 1 to 2 of 2 entries


First Previous 1 Next Last

Close

**Note:** Only one vehicle can be associated with an Arrestee.

With appropriate permissions, you can click on the **Edit** icon  to update the *Master Vehicle Index* record, if necessary. For more information on updating a *Master Vehicle Index* record, refer to "Master Indices" on page 71.

- Quick Search**

Click the **Quick Search** link to search for the **Vehicle** by *VIN*, *License Plate*, and *State*. If the **Vehicle** appears on the search results, click the **Select** icon  to select it.

- Advanced Search/Add**

If the **Vehicle** is not in the *Master Vehicle Index*, click the **Advanced Search/Add** link to add the **Vehicle** to the *Master Vehicle Index*. For more information on searching and adding a *Master Vehicle Index* record, refer to "Master Indices" on page 71.

Once you select the **Vehicle**, it appears in the Vehicle/Towing tab of the Field Arrest.

Arrest		Arrestee Information		Officers - 1		Associated Events - 2		Location - 1		Charges / Warrants - 0		Names - 2			
Property - 0		Vehicle / Towing - 1		Narratives - 1		Attachments - 0		Questions		Validations		Log			
<b>Vehicle Details</b>												View vehicle info or remove it from the Arrest →		View Vehicle Remove Vehicle	
YEAR	VIN	MAKE	MODEL	LICENSE PLATE	LICENSE STATE										
1999	SAFG651AS32165ETR6	CHEVROLET(CHEV)	MONTE CARLO	123456	AK										
LICENSE TYPE	LICENSE MONTH / YEAR	MISC ID	COLOR	DATE OF INFO	INDEX ID										
Automobile (Passenger)	2 / 2013	Misc Identifier	BLU / DBL	10/30/2013 04:11:44 PM	46										
SEIZED		STORED													
<input type="checkbox"/>		<input type="checkbox"/>													
<input type="button" value="Update"/>															
<b>Impound</b>										Add New Impound Add Existing Impound					
<b>Towing</b>										Towing appears when an associated vehicle exists No Towing Select Company Specify Company					
<input type="button" value="Update"/>															

You can click the **View Vehicle** link to view vehicle details or click the **Remove Vehicle** link to remove it from the Field Arrest.

Check the **Seized** box if the vehicle was seized.

Check the **Stored** box if the vehicle was stored.

Click the **Update** button to save your updates.

## Add Towing Information

**Towing** appears at the bottom of the screen only when a vehicle exists on the Field Arrest. Three towing options appear: Choose **No Towing** when towing is not involved, choose **Select Company** to choose an existing towing company, or choose **Specify Company** to add and select a towing company. When selecting or specifying a company, additional entry fields appear.

## Add Impound Information

Click the **Add New Impound** link to add a new record, or click **Add Existing Impound** to select an existing Impound record, then enter the necessary information.

If a vehicle record already exists on the Field Arrest, a warning stating the existing vehicle and towing information may be overwritten. Click **Yes** to continue and overwrite the existing vehicle and towing information, or click **No** to exit without overwriting.



Message From RMS

---

If you continue, vehicle and/or towing information may be overwritten

---

**Note:** When adding an existing Impound record, the vehicle associated with the Impound is added to the Arrest.

Click the **Update** button after all information is entered.

Once you have completed all information, click the **Next Section** button to advance to **Narrative** tab.

## Narrative

The **Narrative** is not required to complete the **Field Arrest**. You can create one or multiple **Narratives**. Click the **Add Narrative** link to open the *Add Narrative* screen. You must enter a **Title** and additional information in the body of the narrative.

**Arrest Summary:** 02/05/2019 1433 Hrs ⓘ **Agency:** District 42, Versailles

**Charges:** **Arrest #:** 1902593

---

**SELECT A TEMPLATE** **NARRATIVE TITLE** **LAST SAVED:** 03/13/2019 1534

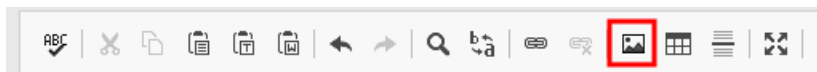
-Select-

Rich text editor toolbar: Undo, Cut, Copy, Paste, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Styles, Format, Size, Font Color, Font Size, Line Height.

body

You can use the formatting icons to customize the layout of your narrative. The built-in *Spelling and Grammar Checker* identifies mistakes and corrects them as you type.


To insert images, you must use the **Image** icon.



**Note:** For more information on Narratives, refer to "Incident Report Section – Narrative Tab" on page 208.

The Narrative auto-saves every 60 seconds while you type. The last saved date and time displays on the form.

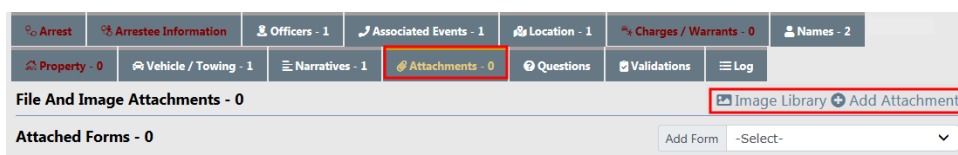
Click the **Save** button.

Click on the Print icon  if you wish to print the Narrative.

Once you have completed all information, click the **Next Section** button to advance to the **Attachments** tab.

## Attachments

**Attachments** are files that are accessed by other programs, such as a picture, document, spreadsheet, etc. These files are uploaded and saved to the **Field Arrest**. You can have none, one, or multiple **Attachments**.



Click on the **Add Attachment** link to add attachments, or click **Image Library** to add image files from your personal *Image Library*. If images do not exist in your Image Library, then the hyperlink does not appear.

Refer to "Attachments" on page 59 or "Image Library" on page 65 for more information.

Click the **Go Back** button after uploading **Attachments**.

Once you have completed all information, click the **Next Section** button to advance to the **Questions** tab.

## Questions

MEDICAL COMMENT

**Drugs Screening**

Did person have drugs in possession	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	<input type="text"/>
Did the person appear intoxicated?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	<input type="text"/>

Save

Select and enter appropriate information in the fields provided.

A red left border in the **comments** fields indicates comments are required. The border may appear depending on the answer you provide to the left of the comment. In the below example, the comments field becomes required when you indicate the person appears intoxicated.

**Drugs Screening**

Did person have drugs in possession	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	<input type="text"/>
Did the person appear intoxicated?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	<input type="text" value="Slurring his words."/>
Were minors present and was action taken?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A	<input type="text"/>

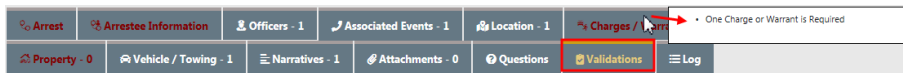
Save

Click the **Save** button.

Once you have completed all information, click the **Next Section** button to advance to the **Validations** tab.

## Validations

You must enter all required information before the system allows you to create the **Field Arrest** record. Tabs with missing required information display in **red**. Hover your mouse over the **red** tab to display a missing data message.



The **Validations** tab will also display the errors that are causing **red** tabs.



Click on each red tab to enter the missing data. Repeat until there are no longer **red** tabs.

If no errors then there will be no **red** tabs.

Click on the **Complete** button at the top of the screen.

Enter any comments and click the **Submit** button. An approval *Notification* is sent to the *Approval Group*.

Your **Field Arrest** is now complete.

## Log

Activities affecting the **Field Arrest** are written systematically to the **Log** tab, creating a trail of events. For example, the system generates a **Log** entry when the **Field Arrest** is created, is updated, and another when it is submitted for approval. The **Log** entry includes the user name, date, and general description of the event.

You can also click on the Add Log button to create your own **Log** entry.

Creator Name	Date Created	Log Entry
Christine Saur	02/05/2019 1443	Field Arrest #1902593 created

Add Log

LOG

This is an example of a manual log entry.

Cancel Save

Click **Save** to create and commit the entry to the Log.

**Note:** Log entries cannot be updated or deleted.

## Duplicate Field Arrest

There are times when multiple arrests occur for the same location and charges. You must create a separate **Field Arrest** record for each Arrestee, and for your convenience, the **Duplicate** button at the top of the *Edit Field Arrest* form duplicates the **Field Arrest** record for each Arrestee systematically to avoid duplicate manual entry.

During the **Duplicate** process, you also select the **Field Arrest** areas to **Duplicate**, such as officers, narrative, charges, etc.

When adding a new **Field Arrest** the *Edit Field Arrest* screen appears automatically after selecting the Arrestee. For more information on adding **Field Arrests** refer to "Add Field Arrest" on page 295.

To **Edit** an existing **Field Arrest** you must first **Search** for the **Field Arrest** you want to **Edit**, then select the appropriate **Field Arrest** to open the *Edit Field Arrest* screen. For more information on searching **Field Arrests** refer to "Search Field Arrests" on page 292.

1. When the *Edit Field Arrest* screen appears, click the **Duplicate** button to begin the duplication process.

The screenshot shows a person profile form with various fields. At the top right, there are buttons for 'Go Back', 'Duplicate', and 'Print'. The 'Duplicate' button is highlighted with a red box. Below the form is a navigation bar with buttons for 'Previous Section' and 'Next Section'. At the bottom, there is a menu bar with buttons for 'Arrest', 'Arrestee Information', 'Officers - 1', 'Associated Events - 1', 'Location - 1', 'Charges / Warrants - 0', 'Names - 2', 'Property - 0', 'Vehicle / Towing - 1', 'Narratives - 1', 'Attachments - 0', 'Questions', 'Validations', and 'Log'.

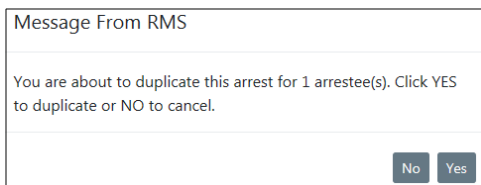
2. The *Duplicate Field Arrest* screen appears.

The screenshot shows the 'Duplicate Field Arrest' screen. At the top right is a 'Go Back' button. Below it, there is an 'Arrest Summary' section with the date '02/05/2019 1433 Hrs' and an 'Agency' section with 'District 42, Versailles'. There is also an 'Arrest #' field with the value '1902593'. The main heading is 'Duplicate Field Arrest'. Below this, there are instructions: 'Click Add Arrestee to select a new arrestee. You can add as many arrestees as you like. For each arrestee, a new field arrest record will be created. You can then choose which sections you would like duplicated.' A red warning message states: 'BEFORE DUPLICATING THIS ARREST, ENSURE THE DATA IS CORRECT! Once you duplicate the arrest, you will have to edit each duplicated arrest if any changes are needed.' Below the instructions, there is an 'Arrestees' section with a red arrow pointing to an 'Add Arrestee' button. At the bottom, there is a 'Sections To Duplicate' table with a red arrow pointing to the 'Include' column.

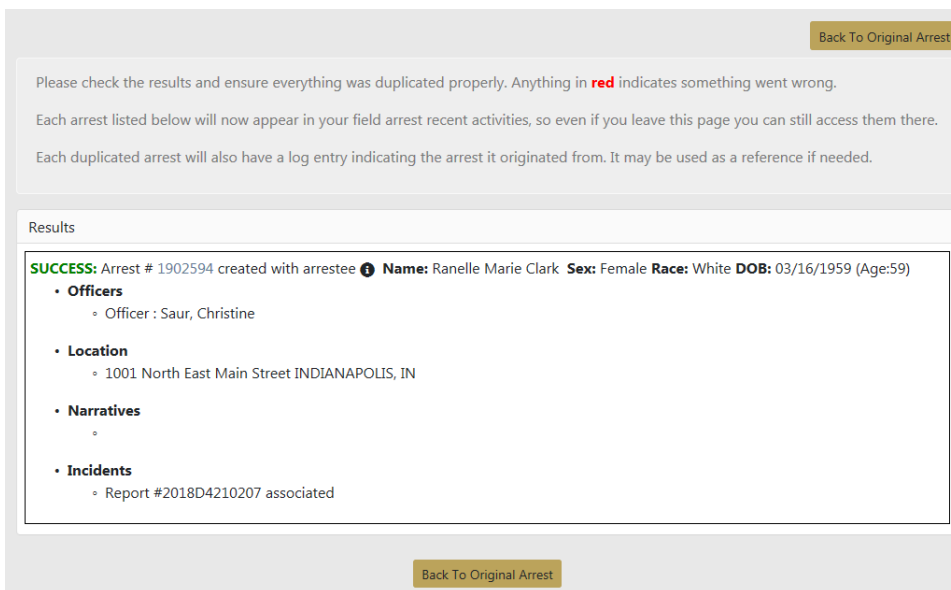
Section	Include
Disposition	<input checked="" type="checkbox"/>
Officers (1)	<input checked="" type="checkbox"/>
Custom Fields (1)	<input type="checkbox"/>

3. Adding all applicable Arrestees is the first step in the duplication process. Click the **Add Arrestee** link to open the *Master Index Search* screen.
4. Search and select the person to add it to the duplicate Field Arrest record. For more information on searching and selecting a person, refer to "Master Indices" on page 71.
5. Click the **Add Arrestee** link to add another Arrestee if needed. You may add as many Arrestees as necessary.
6. After adding all the Arrestees, **select** the appropriate sections to duplicate. The list that appears in the *Sections to Duplicate* section vary based on the information that exists on the original **Field Arrest** record.

7. Click the **Duplicate** button to create a duplicate record for each Arrestee listed, or click **Go Back** at the top of the *Duplicate Field Arrest* screen to return to the *Edit Field Arrest* screen without duplicating.
8. If you chose to click the **Duplicate** button a confirmation message appears.



9. Click **Yes** to duplicate, or click **No** to return to the *Duplicate Field Arrest* screen without duplicating.
10. If you chose to duplicate, the *Duplicate Field Arrest Results* screen appears indicating success or failure. Read the Instructions at the top of the screen to understand how to interpret the results.




11. Click **Back to Original Arrest** to return to the original **Field Arrest**.

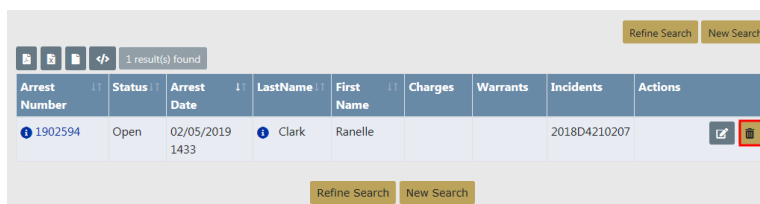
To view Field Arrests for the other Arrestees, you must **Search** for their Field Arrest records. For more information on searching Field Arrests refer to "Search Field Arrests" on page 292.



You may edit the individual **Field Arrest** records. For information on editing Field Arrest records refer to "Edit Field Arrest" on page 298.

## Delete Field Arrest

To **Delete** an existing **Field Arrest** you must first **Search** for the **Field Arrest** you want to **Delete**. For more information on searching **Field Arrests** refer to "Search Field Arrests" on page 292.

1. In the *Search Results* window locate the appropriate **Field Arrest** record then click on the **Delete** icon  under the *Actions* column. If the **Delete** icon does not appear on that record then you do not have delete permissions. See your administrator for more information on permissions.



Arrest Number	Status	Arrest Date	LastName	First Name	Charges	Warrants	Incidents	Actions
1902594	Open	02/05/2019 1433	Clark	Ranelle			2018D4210207	 

2. A confirmation box appears after you click on the **Delete** icon.

Message From RMS

Are you sure you want to delete Field Arrest # 1902594?

This arrest has incidents associated with it. If you delete this arrest, they will be un-associated from it

3. Click **Yes** to confirm or **No** to return to the *Search Results* without deleting. If you choose to delete the arrest, any associated incidents become unassociated.
4. If you clicked **Yes**, you must then enter the reason for the delete, then click the **Delete** button. Or click **Cancel** to abort the delete process.

Delete Field Arrest Comments

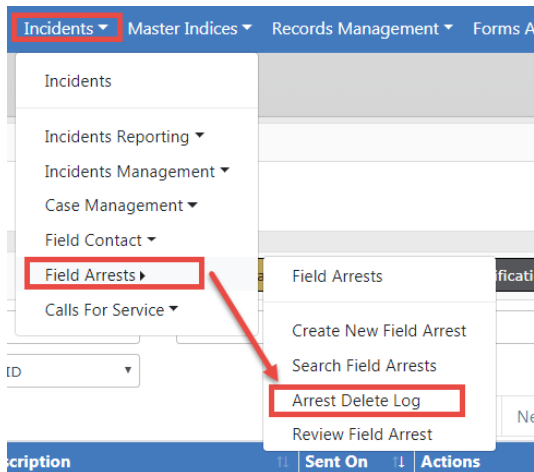
**DELETE COMMENT**

Created for training purposes.

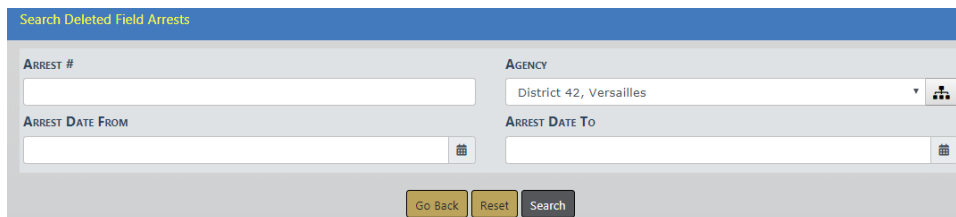


## View Arrest Delete Log

The deleted **Field Arrest** is logged automatically for tracking purposes. To view the log entry, select the *Incidents* menu, *Field Arrests*, then *Arrest Delete Log*.

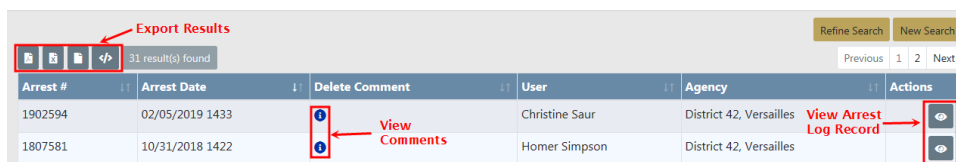


1. The *Search Arrest Delete Log* screen appears.



2. Search for the log entry by entering a date range or Arrest Number if you know it, or leave all fields blank to view all log entries, then click the **Search** button to return a list of all log entries that match your search criteria.
3. You can export the search results to various file types, view the comments that were entered at the time the arrest record was deleted, and view the deleted log entry.

**Note:** For more information on exporting the results refer to "Export Search Results" on page 31.



## Comments

Message From RMS

Created for training purposes.

Close

## View Arrest Log Record

Search Deleted Field Arrests / Arrest Delete Search Results / [View Deleted Arrest](#)

ARREST NUMBER	ARREST DATE	CREATOR NAME	AGENCY
1902594	02/05/2019	Christine Saur	District 42, Versailles

DELETE COMMENT

Created for training purposes.

Go Back

## Print Field Arrest

You can **Print** an existing Field Arrest from either the *View Field Arrest* or *Edit Field Arrest* page.

1. From either page, click on the **Print** button.

Field Arrest Search / Field Arrest Search Results / [View Field Arrest](#)

Go Back **Print**

2. The **Print Options** page opens, with the default settings selected automatically.

Field Arrest Search / Field Arrest Search Results / View Field Arrest / [Print Report](#)

[Go Back](#) [Print Report](#)

**Templates**

Standard Field Arrest  
 Short  
 Full

**Report Options**

Print Booking Information (Disposition)  
 Print Relations  
 Print SMTs and Other Characteristics  
 Print Identification Numbers  
 Print Personal Property  
 Print Officers  
 Print Charges  
 Print Incidents  
 Print Warrants  
 Print Calls for Service  
 Print Vehicles  
 Print Towing  
 Print Victim Information  
 Print Organizations  
 Print Other Names  
 Print Arrest Questions  
 Print Narratives  
 Print Acknowledgement Signature Lines  
 Include Image Attachments

**Arrest Image Options**

Select the images you want included: [\[Select All\]](#) [\[Select None\]](#)

Include PDF Attachments Note: Encrypted PDFs are not supported.

**Attachment Options**

Select the attachments you want included: [\[Select All\]](#) [\[Select None\]](#)

Include Form Attachments

**Form Attachment Options**

Select the forms you want included: [\[Select All\]](#) [\[Select None\]](#)

[Go Back](#) [Print Report](#)

3. Select the **Template** you wish to use. The template preselects report options for you.
  - Standard Field Arrest
    - Selected by default.
    - All print options are available, and all, except for the *Print Acknowledgment Signature Lines*, are preselected as shown in step 2.
  - Short

- A shortened set of print options are available, and fewer print options are preselected.

**Templates**

Standard Field Arrest

Short ←

Full

**Report Options**

Print Booking Information (Disposition)

Print Relations

Print SMTs and Other Characteristics

Print Identification Numbers

Print Personal Property

Print Officers

Print Charges

Print Incidents

Print Warrants

Print Calls for Service

Print Vehicles

Print Towing

Print Victim Information

Print Organizations

Print Other Names

Print Arrest Questions

Print Narratives

Print Acknowledgement Signature Lines

Include Image Attachments

Include PDF Attachments Note: Encrypted PDFs are not supported.

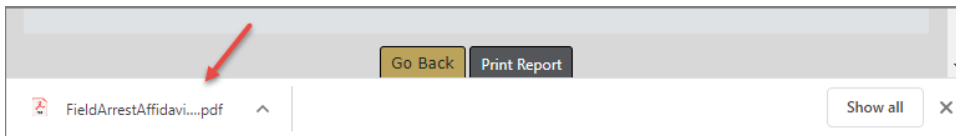
Include Form Attachments

- Full
  - All print options are available, as shown in step 2, except all are preselected, including *Print Acknowledgment Signature Lines*.

**Note:** Whichever template you choose, you can still elect to select or deselect print options.

4. Select or deselect any **Report Options**, if needed.
5. Select **Arrest Image Options**, if applicable, by clicking **Select All** to include all existing arrest images on the report, or click **Select None** to exclude all arrest images.

6. Select the **PDF Attachments** you want to include or exclude, if applicable, by clicking **Select All** to include all existing PDF attachments on the report, or click **Select None** to exclude all.
7. Select the **Form Attachments** you want to include or exclude, if applicable, by clicking **Select All** to include all existing form attachments on the report, or click **Select None** to exclude all.
8. Click on the **Print Report** button to download the PDF report to your local machine.

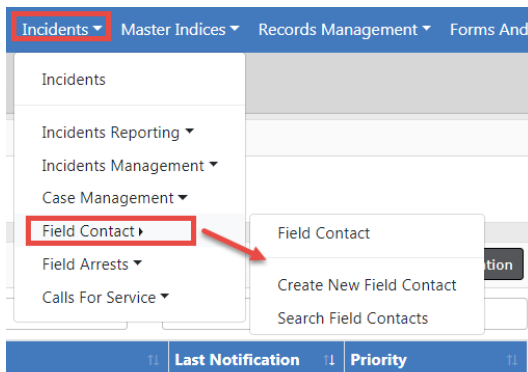




# Chapter 18. Field Contacts

## Overview

A **Field Contact** gives you the ability to document a situation such as an encounter with a suspicious person. The situation is such that it does not warrant an *Incident Report* but you still want to document it in the event something comes of it. That way it is searchable and you see the **Field Contact** associations within the *Master Indices* section. **Field Contacts** are located in the *Incidents* menu where you can search existing or create new **Field Contacts**.



When completing a **Field Contact**, you are able to document:

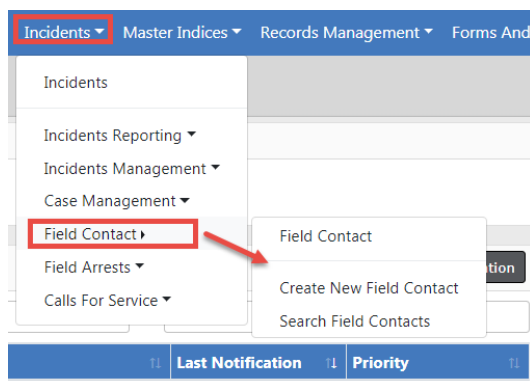
- Notes
- Location
- People
- Officers
- Vehicles
- Gangs
- Organizations
- Attachments
- Associate existing Incidents from within the Field Contact.

- Create Incidents from within the Field Contact.
- Associate existing Calls from within the Field Contact.

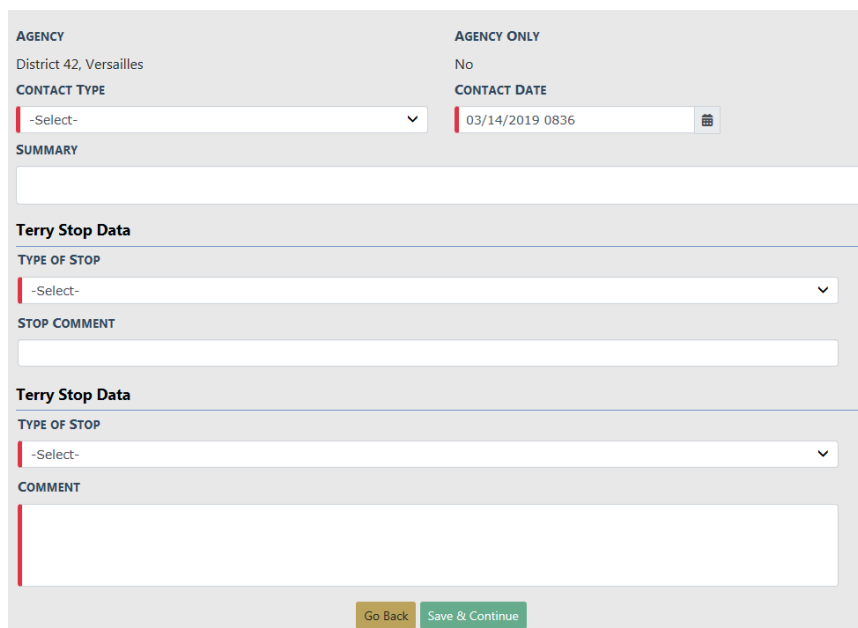
An *Incident Report* can also be generated from the **Field Contact**, similar to the **Field Arrest**. Once the **Associate Incident** link is selected, you will be able to select what information should be transferred to the *Incident Report*.

## Add a Field Contact

Field Contacts are located under the Incidents menu.



Click **Create New Field Contact** menu option to open the **Add Field Contact** form.

A screenshot of the 'Add Field Contact' form. The form is divided into several sections. At the top, there are fields for 'AGENCY' (District 42, Versailles) and 'AGENCY ONLY' (No). Below these are 'CONTACT TYPE' (a dropdown menu with '-Select-' selected) and 'CONTACT DATE' (03/14/2019 0836). A 'SUMMARY' section contains a large text input field. Below this is a 'Terry Stop Data' section with a 'TYPE OF STOP' dropdown menu ( '-Select-' selected) and a 'STOP COMMENT' text input field. Another 'Terry Stop Data' section follows, with a 'TYPE OF STOP' dropdown menu ( '-Select-' selected) and a 'COMMENT' text input field. At the bottom of the form, there are two buttons: 'Go Back' and 'Save & Continue'.



Enter the necessary data. Any field with a red left-hand border is a required field. You must complete required fields to continue.

Click **Save & Continue** to open the **Edit Field Contact** form.

Enter the applicable sections of the **Edit Field Contact** form, then click the **Save** button:

- Field Contact Details
- Stop Data
- Location
- People
- Officers
- Vehicles
- Gangs
- Organizations
- Attachments
- Add (associate) existing Incidents from within the Field Contact.
- Create Incidents from within the Field Contact.

**NOTE:** Once the **Associate Incident** link is selected, you will be able to select what information should be transferred to the *Incident Report*.

- Add (associate) existing Calls from within the Field Contact. If the selected Incident is associated with a Calls For Service, a dialog box with the information appears, giving you the option to associate the Calls For Service to the Field Contact.

Once the **Field Contact** is completed, you can increase the **Security Level** if necessary.

The screenshot shows a web interface for editing a field contact. At the top right, there are buttons for 'Go Back', 'Visualization Tool', 'View Summary', and 'Print'. Below these are several icons. The main section is titled 'Field Contact Details' and contains a table with the following data:

CONTACT ID	AGENCY	SECURITY LEVEL
285	District 42, Versailles	Patrol Officer

Below the table, there are two more rows of data:

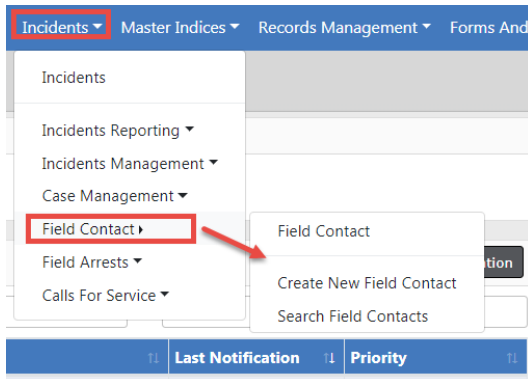
CONTACT TYPE	CONTACT DATE
Knock and Talk	12/13/2018 1354

A red arrow points to a 'Change Security' button located next to the 'SECURITY LEVEL' field.

**NOTE:** For more information on the **Edit Field Contact** form, refer to "Edit a Field Contact" on page 340.

## Search for a Field Contact

**Field Contacts** are located in the *Incidents* menu where you can search existing or create new **Field Contacts**.

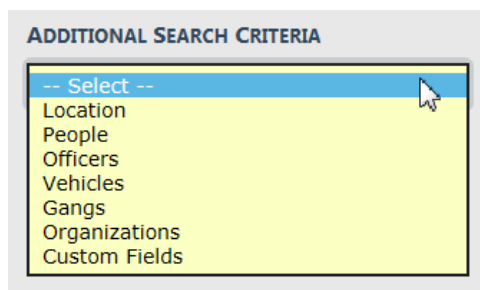


1. Select **Search Field Contacts** from the menu to open the *Search Field Contacts* form.

A screenshot of the 'Search Field Contacts' form. It features several input fields: 'CONTACT ID' (a text box), 'AGENCY' (a dropdown menu with '-All Agencies-' selected), 'CONTACT TYPE' (a dropdown menu with '-- Select --' selected), 'CONTACT DATE FROM' and 'CONTACT DATE TO' (date pickers), 'SUMMARY' (a text area), 'NOTES' (a text area), and 'ADDITIONAL SEARCH CRITERIA' (a dropdown menu with '-- Select --' selected). At the top right is an 'Add Field Contact' button. At the bottom are 'Go Back', 'Reset', and 'Search' buttons.

2. Enter the necessary data that assists with finding the **Field Contact** record.

The **Additional Search Criteria** allows you to include information from a specific section, if needed. Additional search fields will appear if you choose one of the available options from the list.



*Vehicle* example:

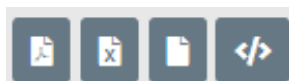
*Custom Fields* example:

**NOTE:** *Custom Fields* is available for agencies that have the *Custom Fields* feature enabled. *Custom Fields* captures data defined by the agency. For more information refer to your administrator.

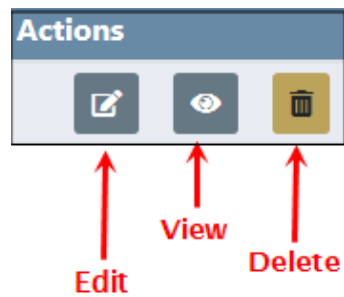
3. Click the **Search** button to view the *Search Results*.

Contact Id	Contact Type	Agency	Summary	Contact Date	Actions
285	Knock and Talk	District 42, Versailles		12/13/2018	[Edit] [View] [Delete]

From the *Search Results* window, you have the ability to export the search results to a file using the icons below the *Search Results* tab. For more information refer to "Export Search Results" on page 31.



4. If you want to make changes to your current search or start a new search, click the **Refine Search** button or the **New Search** button, respectively.
5. The icons under the *Actions* column of the *Search Results* allow you to *Edit*, *View*, or *Delete* a **Field Contact**, if you have the proper permissions. If an icon does not display, then you do not have access to perform that function.

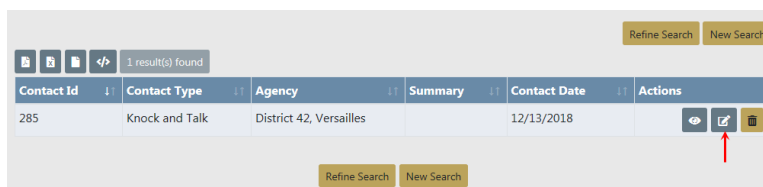


For more information refer to "Edit a Field Contact" below, "View a Field Contact" on page 342, or "Delete a Field Contact" on page 345.

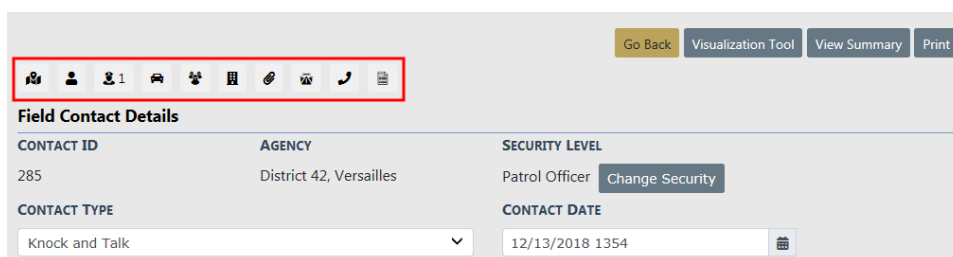
## Edit a Field Contact

To edit a **Field Contact** you must first **Search** for the **Field Contact**, then select the *Edit* icon in the **Search Results** window. For more information on searching refer to "Search for a Field Contact" on page 338.

1. Select the **Edit** icon on the **Field Contact** record in the Search window to open the **Edit Field Contact** page.



There are several sections that make up the **Edit Field Contact** page. Each available section is listed across the top as icons. Click on any icon to go directly to the corresponding section, or scroll down the page to each section. The number that appears on the icon indicates the number of records associated with that icon. For example, the number 1 on the Officer icon indicates there is one officer record, and no number indicates there isn't a record associated with that icon.





**NOTE:** Field Contacts can associate with a Calls for Service (CFS) event while in Edit mode. Click on the **Calls for Service Go To** link or page down to the **Calls for Service** grid to add an associated CFS to a Field Contact record. If the CFS has associated incidents, a pop-up window appears to select incidents that should also be related to the Field Contact.

- Click the **Print** button to print the **Field Contact**. For more information refer to "Print Field Contacts" on page 346.
- Click the **Visualization Tool** button to view display connections between people, addresses, involvements, etc., in a graphical format. For more information refer to "Crime Visualization Tool" on page 131.

**NOTE:** This button is based on user permissions and is not visible to all users. For more information contact your administrator.

- Click the **View Summary** button to view a summary of the **Field Contact**.

Go Back
Visualization Tool
Edit Interview
Print Report

---

**Field Contact Details**

CONTACT ID: 285	AGENCY: District 42, Versailles	SECURITY LEVEL: Patrol Officer
CONTACT TYPE Knock and Talk	CONTACT DATE 12/13/2018 1354	
SUMMARY		
NOTES		

**Terry Stop Data**

TYPE OF STOP Domestic Dispute
STOP COMMENT

**Officers - 1**

Badge #	Name	Agency	Role
SAUR111	Christine Saur	District 42, Versailles	Reporting

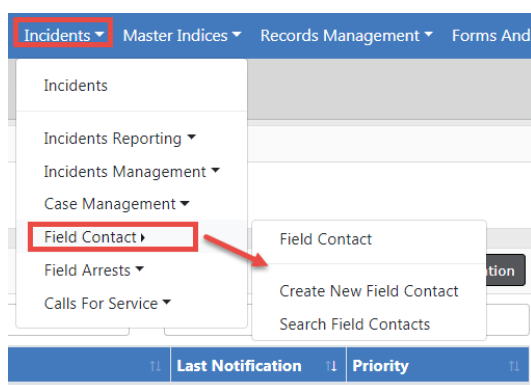
Go Back

Click **Go Back** to return to the *Search Results*, or click **Edit Interview** to return to the **Edit Field Contact** page.

2. Complete all applicable sections and click the **Save** button after each section. For detailed instructions refer to "Enter or Update Field Contact Details" below.

## View a Field Contact

**Field Contacts** are located in the *Incidents* menu where you can search existing or create new **Field Contacts**. To view a Field Contact you must first search for the record.



Click **Search Field Contact** menu option to open the search form and enter the criteria to find and view the appropriate **Field Contact**. For more information on searching, refer to "Search for a Field Contact" on page 338.

## Enter or Update Field Contact Details

Whether you are creating a new **Field Contact** record or updating one that already exists, the process of entering the details is fundamentally the same.

**Field Contacts** data is grouped into various sections: field contact details, notes, locations, people, vehicles, gangs, etc.

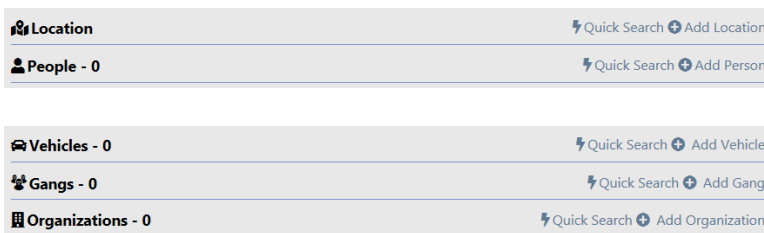
The **Field Contacts** module utilizes *Master Indices*. *Master Indices* are centralized pieces of data that are accessed from different modules of the system for consistency. Each index is represented only once, such as a person, gang, vehicle, and organization.

**NOTE:** For more information on *Master Indices* refer to "Master Indices" on page 71.

Sections containing **Quick Search** and **Advanced Search** links utilize the *Master Index*. Caliber strongly recommends that you first search the *Master Index* to determine whether or not this data already exists before adding or updating. If the record exists, you must use it in the **Field Contact**. If the record doesn't exist, then you can create it, providing you have the proper permissions. For more information on permissions see your administrator.

Click the **Save** button to save the entered data.

## Location, People, Vehicles, Gangs, Organizations



There are two types of searches:

### Quick Search

- Limited Master Index search. For example, for person you can only search by last name, first name, DOB, sex, race, and driver's license number.

#### Person Example

Quick Search

LAST NAME	FIRST NAME	DOB
<input type="text"/>	<input type="text"/>	<input type="text"/>
SEX	RACE	DRIVERS LICENSE
<input type="text" value="-Sex-"/>	<input type="text" value="-Race-"/>	<input type="text"/>

---

#### Vehicle Example

Quick Search

VIN	LICENSE PLATE	LICENSE STATE
<input type="text"/>	<input type="text"/>	<input type="text" value="-Select-"/>

---

### Advanced Search

To perform an advanced search, click on the **Advanced Search/Add** button at the bottom right of the Quick Search window .

- Extensive Master Index search. For example, in addition to the Quick Search criteria for person, you can also search by age, middle name, physical features, age range, and more.
- This feature also allows you to add new *Master Index* records if they don't already exist, providing you have the proper permissions. See your administrator for more information.

### Person Example

Additional search criteria → Mug Shot Search - By Physical Description Add Person

Person

LAST NAME FIRST NAME MIDDLE NAME

TITLE DOB AGE

RACE SEX INDEX ID

DRIVERS LICENSE DRIVERS LICENSE STATE SSN

NAME TYPE CREATOR

CREATION DATE FROM CREATION DATE TO

PHONETIC SOUNDEX STATEWIDE SEARCH SEARCH PREFERENCE

ALL ANY

ADDITIONAL SEARCH CRITERIA

Search External Systems

Go Back Reset Search

### Vehicle Example

Add Vehicle

Vehicle

YEAR MAKE MODEL

VIN TYPE STYLE

LICENSE PLATE LICENSE STATE INDEX ID

CREATOR

CREATION DATE FROM CREATION DATE TO SEARCH PREFERENCE

ALL ANY

ADDITIONAL SEARCH CRITERIA

Search External Systems

Go Back Reset Search



## All Other Sections

Enter data into all applicable sections.

Any field with a red left-hand border is a required field. You must complete required fields to continue.

### Add Officer

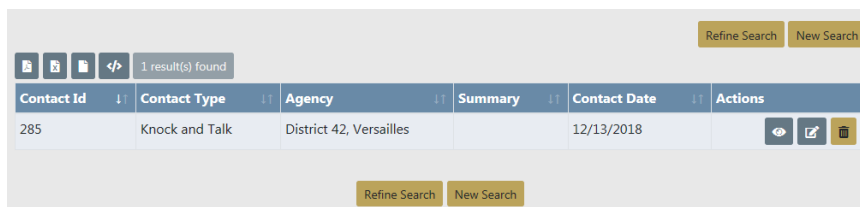
Click **+Add Officer** to include additional officers.

## Delete a Field Contact




On rare occasions you may need to delete a **Field Contact** record, if you have proper permissions to do so.


**NOTE:** **Field Contacts** can be deleted only by the creator.


1. Search for the **Field Contact** record you want to delete. For more information on searching refer to "Search for a Field Contact" on page 338.
2. The **Field Contact** record you want to delete should appear in the Search Results window.

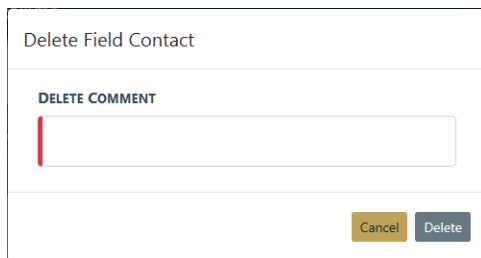


The screenshot shows a search results interface. At the top right, there are buttons for "Refine Search" and "New Search". Below this, there are icons for document, list, and refresh, followed by the text "1 result(s) found". The main part of the screenshot is a table with the following columns: Contact Id, Contact Type, Agency, Summary, Contact Date, and Actions. The table contains one row with the following data: Contact Id: 285, Contact Type: Knock and Talk, Agency: District 42, Versailles, Contact Date: 12/13/2018. The Actions column for this row contains three icons: a speech bubble, a pencil, and a trash can. At the bottom of the table, there are buttons for "Refine Search" and "New Search".

Contact Id	Contact Type	Agency	Summary	Contact Date	Actions
285	Knock and Talk	District 42, Versailles		12/13/2018	  

The **Delete** icon  in the *Actions* column allows you to **Delete** the record listed. If the delete icon does not display, then it is likely you do not have permissions to delete it. For more information on permissions, refer to your administrator.

3. Click the **Delete** icon  on the record you want to delete.
4. Enter **Delete Comment** then click **Delete**.



Delete Field Contact

DELETE COMMENT

Cancel Delete

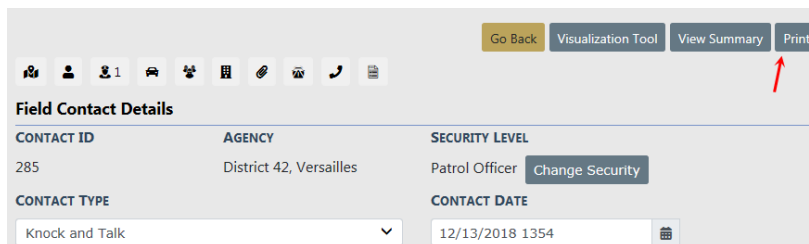
## Print Field Contacts

You can print a Field Contact you are viewing or editing.

For more information on editing a Field Contact refer to "Edit a Field Contact" on page 340.

For more information on viewing a Field Contact refer to "View a Field Contact" on page 342.

1. Click the **Print** button while viewing or editing the **Field Contact**.



Go Back Visualization Tool View Summary **Print**

Field Contact Details

CONTACT ID	AGENCY	SECURITY LEVEL
285	District 42, Versailles	Patrol Officer <a href="#">Change Security</a>

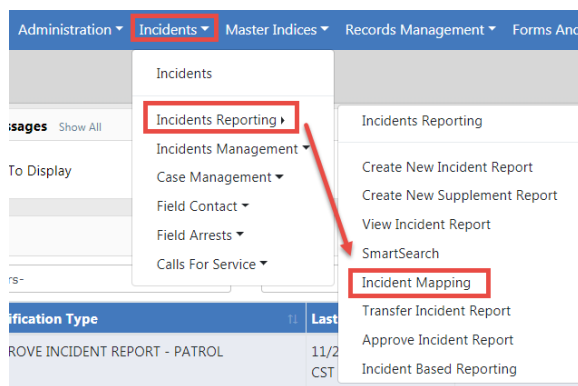
CONTACT TYPE	CONTACT DATE
Knock and Talk	12/13/2018 1354

2. A file downloads to your machine. Click on the file to open the file in a new window, then click the print icon on the upper right-hand corner.

# Chapter 19. Incident Mapping

## Access Incident Mapping

To access **Incident Mapping**, click on the **Incidents Reporting** drop-down menu on the top *Navigation Bar*, then click on **Incident Mapping**.



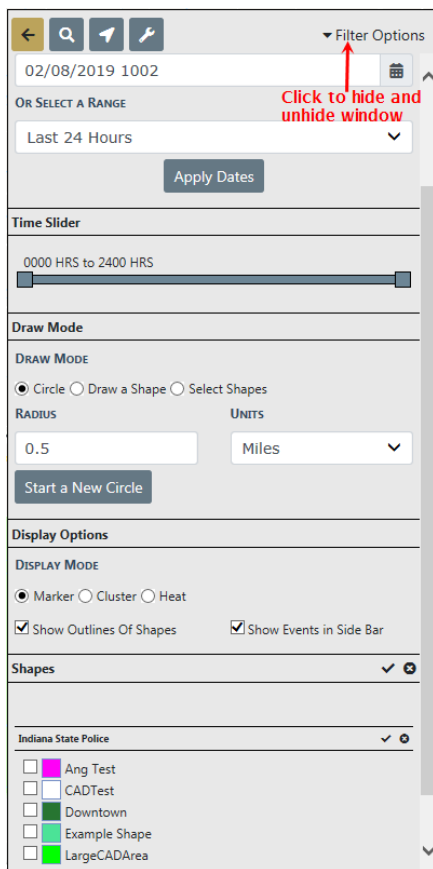
## Screen Layout


**Incident Mapping** contains two windows that overlay the map:

- Filter Options
- Current Query

The *Current Query* displays search results based on the defined *Filter Options*.

## Filter Options Window



- **Date Options** – Select a start date and time and an end date and time. You may also select a date range from the drop-down list, such as *Last 24 Hours*, *Week to Date*, *Last Week*, *Month to Date*, etc. There is also a Time Slider if you want to select just a specific Time range. Click the **Apply Dates** button.
- **Draw Mode** – This allows you to select a *Circle Radius*, *Draw a Shape*, or *Select Shapes*. If you select the *Circle* option, you need to select Radius and Units. The Radius and Units defaults to 0.5 Miles.
- **Display Options** – These are options on how the search results display.
- **Shapes** – are the Areas to which you want search results to be returned. Check the box next to the applicable areas then click the **Apply Selected Shapes** button when it appears. The **Apply Selected Shapes** button does not display until at least one area box is checked.
- **Search Address** - To search for a specific address, select the magnifying glass icon  on the top of the window to open the search window.

Enter the street address then select the **Search** button or press **Enter** to display a list of matching addresses. Click on the *[Draw Circle At Center]* link if you want to draw a circle on the map around a specific address from the list.

- *Configure* - To configure what and how event types Incidents, Active Warrants, Court Papers, and Calls for Service are displayed on the map, select the **Configure** icon

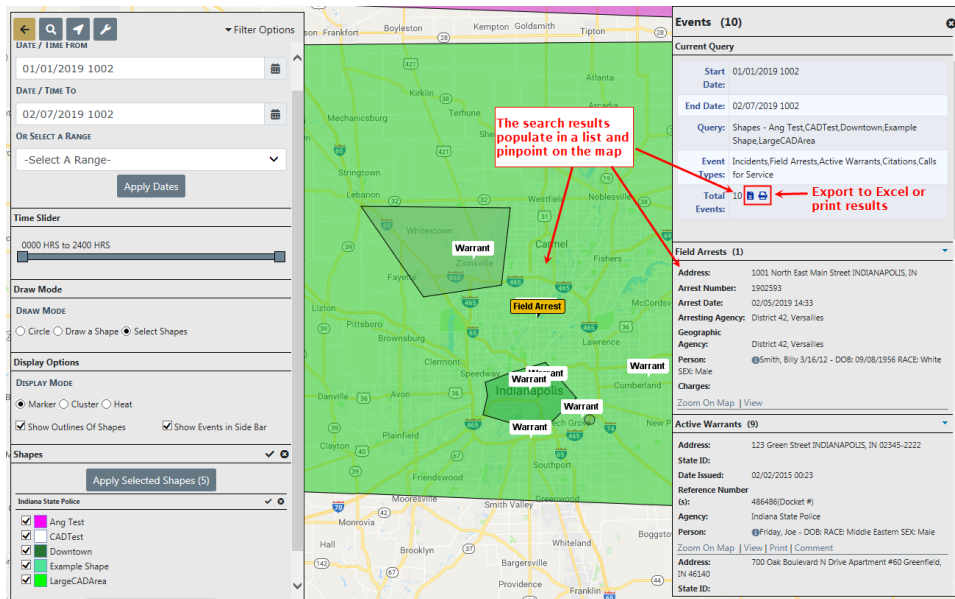
Your search results reflect what you select in the *Basic Configuration* tab.

After making your selections on each tab, click the **Exit Configuration** button to return to the previous screen.

- *Exit* Incident Mappings window. To exit the Incident Mappings window and return to your Home Page, select the **Go Back** icon
- *Center Map* - To center the Map on the screen, select the **Center Map** icon

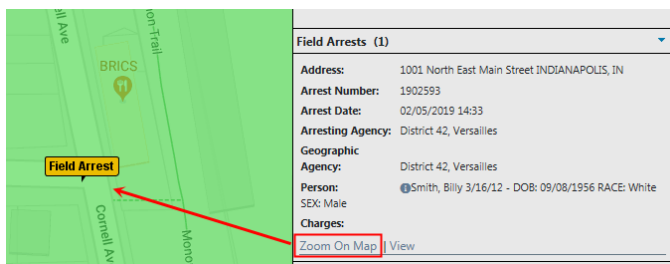
- *Hide or Unhide Filter Window* - To hide or unhide the Filter Window, select the **Filter Options** button.

### Query Window



From the *Current Query* section of the **Query Window** you have the ability to print or export the search results to an Excel document.

Click the **Zoom On Map** link to zoom to a specific event on the map.



Anyone with permissions to view warrant locations on the **Incident Map** can also view, print and comment directly from the map to the Warrant. You must enter a Log Date and Time, Action Type and Comment. This will be added to the Warrant Log.

**View, print, or make comments to warrants**

**Warrant**  
Coordinates: 39.698527,-86.155949  
Address: 123 Green Street INDIANAPOLIS, IN 02345-2222  
State ID:  
Date Issued: 02/02/2015 00:23  
Reference Number (s): 486486(Docket #)  
Agency: Indiana State Police  
Person: Friday, Joe - DOB: RACE: Middle Eastern SEX: Male  
View | Print | Comment

Total Events: 10

**Field Arrests (1)**  
Address: 1001 North East Main Street INDIANAPOLIS, IN  
Arrest Number: 1902593  
Arrest Date: 02/05/2019 14:33  
Arresting Agency: District 42, Versailles  
Geographic Agency: District 42, Versailles  
Person: Smith, Billy 3/16/12 - DOB: 09/08/1956 RACE: White  
SEX: Male  
Charges:  
Zoom On Map | View

**Active Warrants (9)**  
Address: 123 Green Street INDIANAPOLIS, IN 02345-2222  
State ID:  
Date Issued: 02/02/2015 00:23  
Reference Number (s): 486486(Docket #)  
Agency: Indiana State Police  
Person: Friday, Joe - DOB: RACE: Middle Eastern SEX: Male  
Zoom On Map | View | Print | Comment

Click the **Save** button to commit the comment to the log, or click **Cancel** to abort the log entry and return to the map.

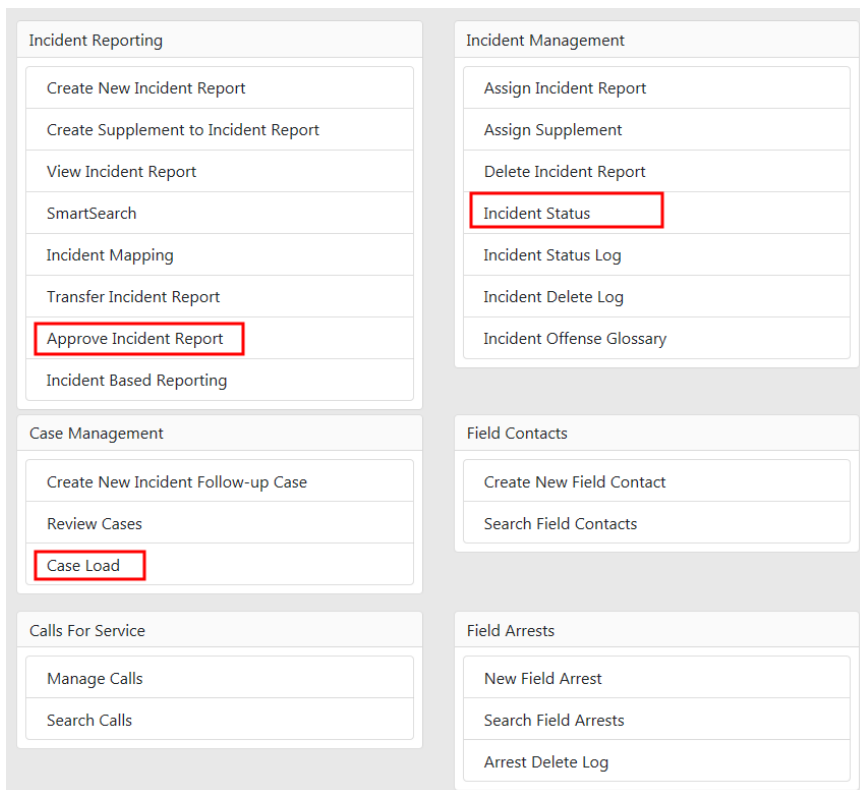




# Chapter 20. Supervisory Functions

## Supervisory Function Overview

Users with *Supervisor* rights have more options than the regular user. Most of these added functions will be seen in the Incidents menu. For more information on accessing the Incidents menu, refer to "Incidents Overview" on page 161.



## Approve/Disapprove Incident Report

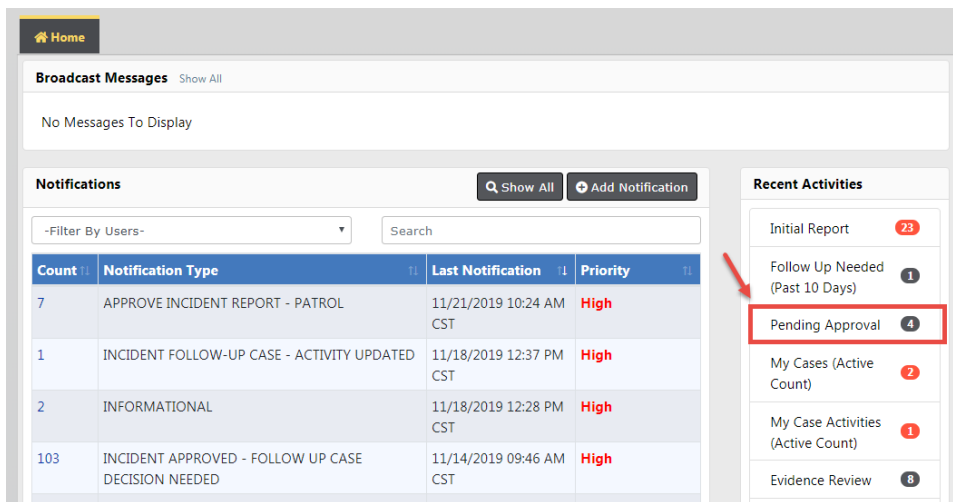
You can initiate the approval process one of three ways:


- Click on *Pending Approval* in **Recent Activities** section, located on the right side of the home page.
- Directly from the **Notification** when Incident Reports are submitted for approval.

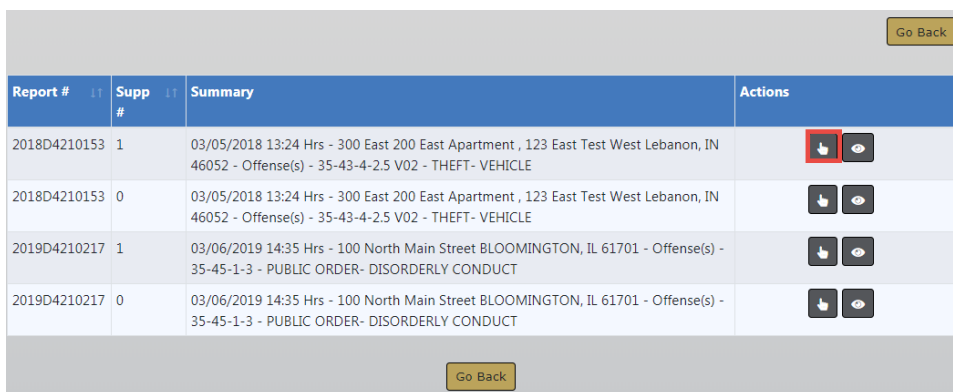
- Directly from the **Incident**.

### Initiate from Recent Activities

Initiate the incident approval process by clicking on *Pending Approval* under Recent Activities.



Click on the select icon  to select the appropriate incident from the list.



Click the **Approve/Disapprove** button to open the Incident Report.

The screenshot shows an incident summary for 03/06/2019 1435 Hrs - 100 North Main Street BLO... with agency District 42, Versailles. The offense is PUBLIC ORDER- DISORDERLY CONDUCT. Below is a table of incident reports:

Reports	Submitting User	Status	Reporting Officer(s)	Actions
Original Report	CSAUR	03/06/2019 1435 Hrs - Pending Approval	Saur-Christine	👍 / 🗑️
Supp #1	CSAUR	03/06/2019 1449 Hrs - Pending Approval	Saur-Christine	👍 / 🗑️

The Incident Report opens. Continue with the approval/disapprove process. For more information, refer to "Approval/Disapprove Process" on page 357.

### Initiate from Notifications

Users with a supervisory role for their agency will receive notifications when Incident Reports are submitted for approval. A supervisor can initiate the approval process directly from the notification.

For more information about accessing notifications, refer to "Notifications" on page 21.

Click on the appropriate notification to initiate the approval process.

The screenshot shows a list of notifications. The second notification is highlighted with a red box:

TYPE	PRIORITY	DESCRIPTION
INCIDENT APPROVED	High	Incident Report 2017D4210140 Supp #1 Has Been Approved. Offenses:35-43-2-1 B01 BURGLARY- AIRPORT; 35-43-2-1 B05 BURGLARY- BAKERY;
APPROVE INCIDENT REPORT - PATROL	High	<a href="#">The Incident Report#: 2018D4210153 Supp#: 0 Has Been Submitted For Approval. Offenses: 35-43-4-2.5 V02 THEFT- VEHICLE;</a>
WARRANT REMOVED FROM FIELD ARREST	High	Warrant #121212 (Docket #) removed from Field Arrest #1810589 by Homer Simpson. Status changed from Pending Service to Active

Click on the **Take Action** button.

The screenshot shows a detailed notification dialog with the following fields:

<b>TYPE</b> APPROVE INCIDENT REPORT - PATROL	<b>PRIORITY</b> High
<b>SENDER</b> Saur Christine	<b>SENT ON</b> 02/08/2019 01:37 PM CST
<b>DESCRIPTION</b> The Incident Report#: 2018D4210153 Supp#: 0 Has Been Submitted For Approval. Offenses: 35-43-4-2.5 V02 THEFT- VEHICLE;	

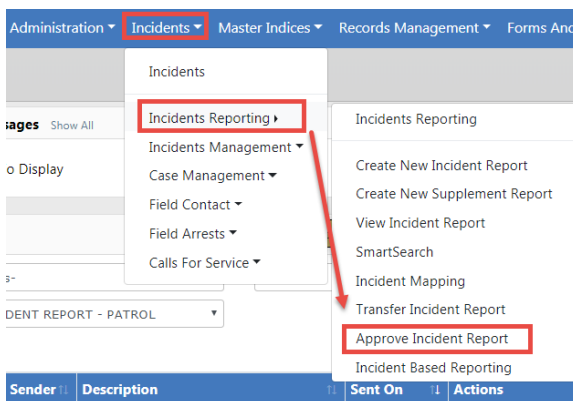
Buttons: Take Action, Close

The Incident Report opens. Continue with the approval/disapprove process. For more information, refer to "Approval/Disapprove Process" on the facing page.

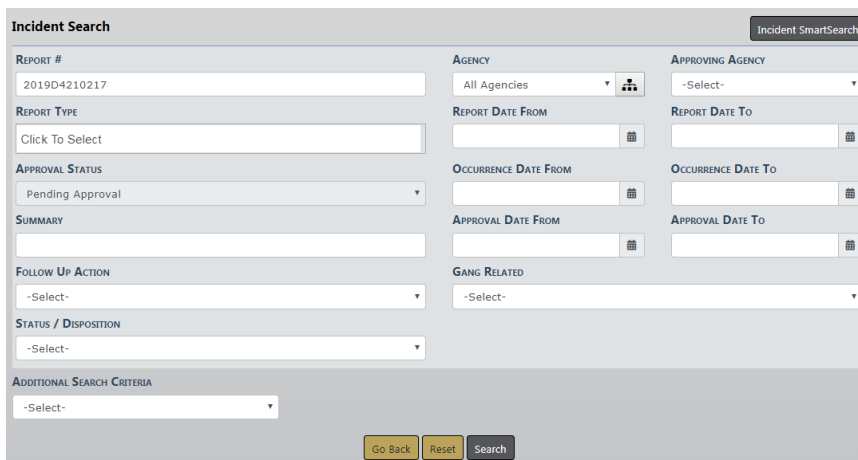
### Initiate from the Incident


Users with a supervisory role can also initiate approval directly from the Incident.

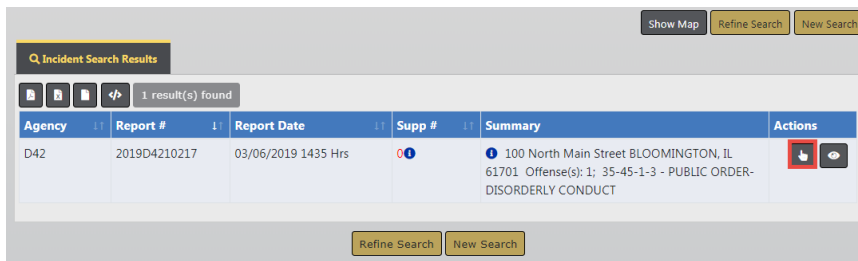
Click **Incidents** on the top navigation bar, click on **Incidents Reporting**, then click on **Approve Incident Report**.



The *Incident Search - Approve Incident Report* screen appears.



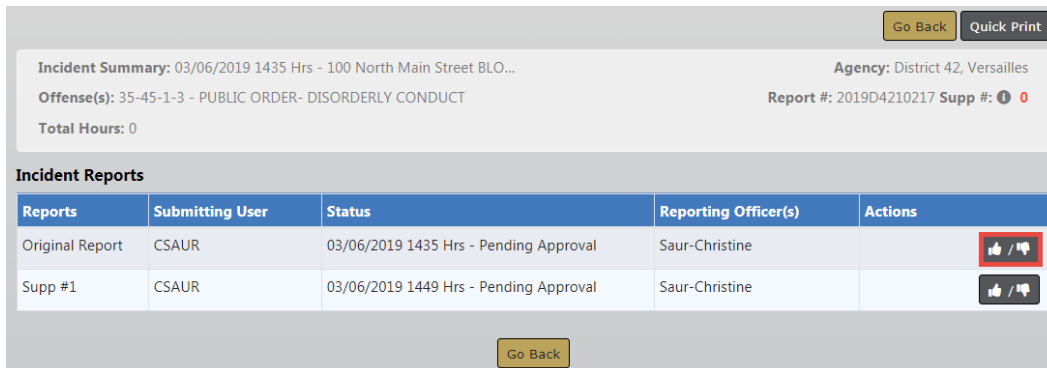
Enter the search criteria, click on the **Search** button to display the search results, then click the **select icon**  to begin the approval process.



The screenshot shows the 'Incident Search Results' interface. At the top right are buttons for 'Show Map', 'Refine Search', and 'New Search'. Below is a search bar with 'Incident Search Results' and a '1 result(s) found' indicator. A table displays search results with columns: Agency, Report #, Report Date, Supp #, Summary, and Actions. The first row shows Agency 'D42', Report # '2019D4210217', Report Date '03/06/2019 1435 Hrs', Supp # '0', and Summary '100 North Main Street BLOOMINGTON, IL 61701 Offense(s): 1; 35-45-1-3 - PUBLIC ORDER-DISORDERLY CONDUCT'. The Actions column contains a thumbs-up icon and a thumbs-down icon, both highlighted with a red box.

Agency	Report #	Report Date	Supp #	Summary	Actions
D42	2019D4210217	03/06/2019 1435 Hrs	0	100 North Main Street BLOOMINGTON, IL 61701 Offense(s): 1; 35-45-1-3 - PUBLIC ORDER-DISORDERLY CONDUCT	

Click the **Approve/Disapprove** button to open the Incident Report.



The screenshot shows the 'Incident Report' interface. At the top right are buttons for 'Go Back' and 'Quick Print'. The 'Incident Summary' section includes: '03/06/2019 1435 Hrs - 100 North Main Street BLO...', 'Agency: District 42, Versailles', 'Offense(s): 35-45-1-3 - PUBLIC ORDER- DISORDERLY CONDUCT', 'Report #: 2019D4210217', 'Supp #: 0', and 'Total Hours: 0'. Below is the 'Incident Reports' section with a table:

Reports	Submitting User	Status	Reporting Officer(s)	Actions
Original Report	CSAUR	03/06/2019 1435 Hrs - Pending Approval	Saur-Christine	
Supp #1	CSAUR	03/06/2019 1449 Hrs - Pending Approval	Saur-Christine	

At the bottom center is a 'Go Back' button.

The Incident Report opens. Continue with the approval/disapprove process. For more information, refer to "Approval/Disapprove Process" below.

### **Approval/Disapprove Process**

After choosing a method to initiate the approval process, the *Incident Approval* screen appears, defaulting on the Summary tab.

The screenshot shows the incident report interface with the following elements:

- Top Navigation:** Exit Report, Approval Utilities, Approve/Disapprove, Quick Print, Print.
- Report Summary:** Incident Summary: 03/06/2019 1435 Hrs - 100 North Main Street BL...; Agency: District 42, Versailles; Offense(s): 35-45-1-3 - PUBLIC ORDER- DISORDERLY CONDUCT; Report #: 2019D4210217; Supp #: 0; Total Hours: 0.
- Actions:** Add / Edit Disapproval Comments, Actions (Add, 3), 3 / 3, 2 Pending Approval, 1 Initial Report.
- Report Header Table:**

REPORT ID	REPORT SECURITY	REPORT TYPES
3206	Patrol Officer	Disturbance
- SUMMARY:** Loud music at 2am.
- REPORT DATE:** 03/06/2019 1435
- OCCURRENCE DATE START:** 03/06/2019 1435
- OCCURRENCE DATE END:**
- ISP:** GANG INVOLVED
- Alcohol Involved Info:** ALCOHOL INVOLVED, NUMB
- Additional Information:**

You can perform various functions, such as check for warnings, search for offense or NIBRS codes, add disapproval comments if applicable, and review the incident report. Supervisors can also edit the incident report providing the agency is setup to allow this function.

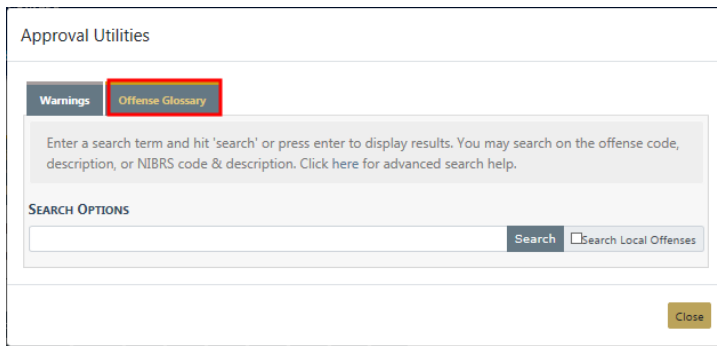
### Approval Utilities

Optionally, click on the **Approval Utilities** button on the top right of the page to view *Warnings* and search for offense or NIBRS codes using the *Offense Glossary*.

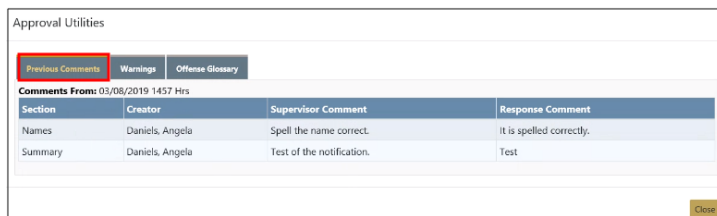
The screenshot shows the **Approval Utilities** dialog box with the following elements:

- Buttons:** Exit Report, Approval Utilities, Approve/Disapprove, Quick Print, Print.
- Navigation:** Property & Vehicles, Narratives, Attachments, Validations.
- Approval Utilities Section:** Warnings, Offense Glossary.
- Warning Message Table:**

Type	Message
NIBRS	Incident contains a Hate Bias Motivation. Please verify that Hate/Bias was a factor in the incident.
- Close Button:** Close



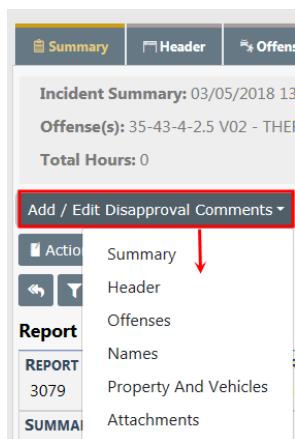
A *Previous Comments* tab appears if the incident report is disapproved at least once. This tab contains comments that are made during the disapproval process.



### Disapproval Comments

If applicable, you can add disapproval comments to various sections of the incident report two ways.

- Click the **Add/Edit Disapproval Comments**, then select an option from the list to incorporate disapproval comments to various sections. Add your comments then click **Save**.



Disapproval Comments

---

**COMMENT**

Enter comments here

Cancel
Save

- Or, you can page down and add **Disapproval Comments** to various sections like shown in the example below.

**Offenses**
Disapproval Comments
Update All Offenses' Status
Add Offense

NIBRS	Severity	Offense	Remarks	Status Date	Status	Supp #	Actions
240	1	35-43-4-2.5 V02 THEFT- VEHICLE		03/05/2018 1324	Open/Pending	0	

**Modus Operandi**
Add Modus Operandi

**Offenders**
Disapproval Comments
Add Offender
Add Unknown Offender

Name	Age (Yrs)	Role(s)	Supp #	Actions
Aaberg, Ken <small>Race: White Sex: M DOB: 07/09/1975</small>	42 Years Old	Suspect / Offender	0	

**Victims**
Disapproval Comments
Add Person Victim
Add Organization Victim

Name	Age (Yrs)	Offense(s)	Injuries	Role	Supp #	Actions
Dsfq, Joe <small>Race: Native Hawaiian or Other Pacific Islander Sex: M</small>	31 Years Old	35-43-4-2.5 V02- THEFT- VEHICLE		Victim	0	

**Other Names**
Disapproval Comments
Add Person
Add Organization

**Properties**
Disapproval Comments
TOTAL VALUE(\$): 0.00
All
Add Property

Index ID	Property Description	Processing	Original Status	Current Status	Value (\$)	Supp #	Actions
OTHER PROPERTY							

### Edit the Incident Report

The agency setup dictates whether or not supervisors can edit the incident report during the review process. If supervisors have been granted edit privileges, an **Edit** link appears on the top right of applicable sections.



Report Header		
REPORT ID 3206	REPORT SECURITY Patrol Officer	REPORT TYPES Disturbance
SUMMARY Loud music at 2am.		
REPORT DATE 03/06/2019 1435	OCCURRENCE DATE START 03/06/2019 1435	OCCURRENCE DATE END
ISP		
GANG INVOLVED		
Alcohol Involved Info		
ALCOHOL INVOLVED	NUMB	
Additional Information		
SUICIDE		
GANG SUMMARY	NOWDATEANDTIME	

### Finalize the Approval Process

Click on the green **Approve/Disapprove** button on the top right of the incident report to open the *Approve Incident Report*.

Exit Report
Approval Utilities
Approve/Disapprove
Quick Print
Print

Narratives
Attachments
Validations

Incident Summary: 03/06/2019 1435 Hrs - 100 North Main Street BLO...
 Agency: District 42, Versailles

Offense(s): 35-45-1-3 - PUBLIC ORDER- DISORDERLY CONDUCT
 Report #: 2019D4210217 Supp #: 0

Total Hours: 0

Approval Options
Incident
Offense Glossary

Approve
Disapprove
Security Level Patrol Officer
Agency Only No
Change Security

INCIDENT FOLLOW-UP ACTION: Closed- No Action
 INCIDENT STATUS / DISPOSITION: -Select-

ROUTE TO EXTERNAL AGENCY:

**Notifications To Be Sent**

Send	Notification	Destination Agency
<input checked="" type="checkbox"/>	INCIDENT APPROVED	District 42, Versailles

ENTER NOTIFICATION COMMENTS HERE

**Other Options**

FOR PUBLIC RELEASE (Applies To All Supplements)
 NOTIFY PROSECUTOR OF WARRANT / CHARGE REQUEST

Go Back
Approve
Approve & Print

There are four tabs on the *Approve Incident Report* screen:

- Approval Options

- Contains the necessary options to either Approve or Disapprove. The *Approve Incident Report* screen defaults to this tab.
- Warnings (if applicable)
  - Contains Incident Report validation warnings.

Type	Message
NIBRS	Incident contains a Hate Bias Motivation. Please verify that Hate/Bias was a factor in the incident.

- Incident
  - Incident Report in view only mode.

The Offenses section includes details for the related NIBRS Offense code, NIBRS Offense Title, and offense description. Hover the mouse over the blue information bubble to view a summary of this information, or click on the blue information bubble to view details.

REPORT #	LOCATION	AGENCY
2019D4210217	100 North Main Street BLOOMINGTON, IL 61701	District 42, Versailles
REPORTING AREA	TYPES	NIBRS CITY
-	Disturbance	BLOOMINGTON
AGENCY OF OCCURRENCE	COUNTY	REPORT DATE
District 42, Versailles	Hancock	03/06/2019 1435
OCCURRENCE DATE	TOWNSHIP	LOCATION REMARKS
03/06/2019 1435		
DISPATCH DATE	ON SCENE DATE	CLEAR DATE
SUMMARY		
Loud music at 2am.		

- Offense Glossary
  - Contains a feature to lookup offenses to confirm accuracy of the offense selected for the Incident Report. Enter the search criteria in the search field provided, then press **Enter** or click **Search** to display a list of NIBRS Codes that contain the entered text.

Enter a search term and hit 'search' or press enter to display results. You may search on the offense code, description, or NIBRS code & description. Click here for advanced search help.

SEARCH OPTIONS

assault   Search Local Offenses

	Offense Code / Description	NIBRS Code / Description
+	35-42-2-1 B01 - BATTERY - ATTEMPTED	13B - Simple Assault
+	35-42-2-1 B02 - BATTERY - BODY WASTE	13A - Aggravated Assault
+	35-42-2-1 B03 - BATTERY - CHILD	13A - Aggravated Assault
+	35-42-2-1 B04 - BATTERY - FIREARM	13A - Aggravated Assault
+	35-42-2-1 B05 - BATTERY - KNIFE	13A - Aggravated Assault
+	35-42-2-1 B06 - BATTERY - MENTAL PATIENT	13A - Aggravated Assault

## Approval Options

Depending on your agency's business practice, supervisors may have various options when approving a report:

- Restricting reports to the internal *Agency Only*. The **Route to External Agency** button is gray when the report is restricted to the internal agency, and green when selected to route to external agencies.
- Click on the **Change Security** button allowing for greater internal security among the users within an agency.
- Choose the **Follow-up Action**.
- Choose the **Status/Disposition**.
  - Your system administrator has the ability to map *Incident Status* codes to *Offense Status* codes to prevent mismatches. During the approval process, if you set an *Incident Status* to something other than what has been mapped to an *Offense Status*, a message appears disallowing that selection and it prompts you to verify the information and make any necessary changes. Refer to your system administrator for more information.

**NOTE:** The Follow-up/Action option you choose drives what Incident Status/Dispositions are available for selection.

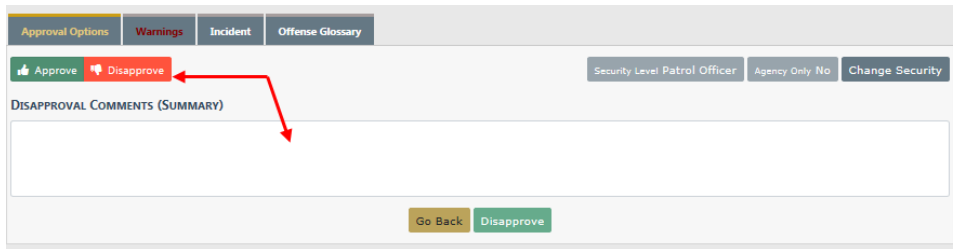
The different options available will depend on the workflow selected for **Case Management** by your agency. The *Notifications to Be Sent* section generates a notification to request a follow-up Case determination in an optional workflow. For more information refer to "Case Management" on page 381.

Make other necessary updates.

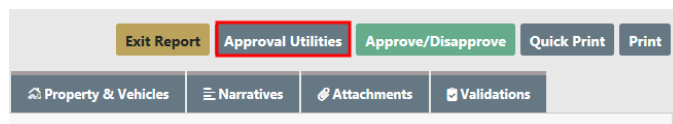
Click the **Approve** button to finalize the approval, or click the **Approve and Print** button to finalize the approval and print.

### Disapprove

When **Disapprove** is selected, a comments box displays so the supervisor can advise the user of the reason for the disapproval. Enter comments then click the **Submit** button.



The disapproval comments now appear in the *Previous Comments* tab in Approval Utilities.



Approval Utilities

Previous Comments | Warnings | Offense Glossary

Comments From: 03/08/2019 1457 Hrs

Section	Creator	Supervisor Comment	Response Comment
Names	Daniels, Angela	Spell the name correct.	It is spelled correctly.
Summary	Daniels, Angela	Test of the notification.	Test

Close

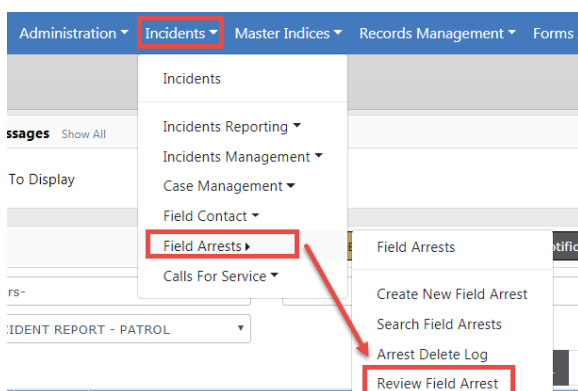
## Approve or Disapprove Field Arrests

As an Officer Supervisor for your agency, you receive notifications when officers submit **Field Arrests** for approval. You can initiate the approval process one of three ways:

- Click on the new *Notification* link to view the Notification, then click the **Take Action** button to open the **Review Field Arrest** form. For more information on Notifications refer to "Notifications" on page 21.
- Directly from the notification by clicking on the select icon under the Actions column.

Notifications					
-Filter By Users-		arrest approval			
FIELD ARREST APPROVAL REQUEST - PATROL		Previous 1 Next			
Priority	Sender	Description	Sent On	Actions	
High	Tester Mr.	Arrest #1611504 has been submitted for approval	11/23/2016 01:39 PM CST		

- Or select the **Review Field Arrest** link from the **Incidents** menu, then search for Field Arrest record.



**Field Arrest Search** Go Back

LAST NAME	FIRST NAME	SSN	RACE
<input type="text"/>	<input type="text"/>	<input type="text"/>	--Select--
SEX	DOB	AGE	
--Select--	<input type="text"/>	<input type="text"/> To <input type="text"/>	
ARREST DATE FROM	ARREST TIME FROM	ARREST DATE TO	ARREST TIME TO
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ARREST #	AGENCY	REFERENCE #	REFERENCE # TYPE
<input type="text"/>	--All Agencies--	<input type="text"/>	--Select--
STATUS	REVIEW STATUS	PLATE #	WARRANT REFERENCE #
--Select--	Pending Review	<input type="text"/>	<input type="text"/>
INCIDENT REPORT #	CHARGE CODE	INDEX ID	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

**Officer**

FIRST NAME	LAST NAME	BADGE #	ROLE
<input type="text"/>	<input type="text"/>	<input type="text"/>	--Select--

ADDITIONAL SEARCH CRITERIA

--Select--

Go Back Reset Search

Search for the **Field Arrest** record by entering the information you know about the arrest, then click the **Search** button to display a list of Arrests from which to choose.

- Click the **Review** icon to *Approve* or *Disapprove* the **Field Arrest** record.

The screenshot shows a table with the following data:

Arrest Number	Status	Arrest Date	LastName	First Name	Charges	Warrants	Incidents	Actions
1807580	Open	10/29/2018 1516	Harris	Tom	35-45-1-3 - PUBLIC ORDER-DISORDERLY CONDUCT	Warrant #: MATT2016002, Docket #: 231321	2016D4210053, 2017-0088, 2017D4210068, 18-HCSD-0516, 18-HCSD-0029, 2018-00027, 2018D4210174, 2018D4210175	[Search] [Edit] [Delete]

Below the table is a form titled "Approve Field Arrest" with buttons for "Go Back", "Approve", "Disapprove", and "Print". The "Approve" button is highlighted with a red box. Below the form is a section for "Person Information".

### Approve

Click the **Approve** button on the **Approve Field Arrest** screen, then click **Yes** in the confirmation window to approve.

Message From RMS

Are you sure you want to complete this action? You will be taken away from this page once the Approval is complete.

[No] [Yes]

### Disapprove

Click the **Disapprove** button on the **Approve Field Arrest** screen, then enter **Comments** and click **Save**.

Disapprove Field Arrest

**Disapproving the arrest will send a notification to the creator to make edits.**

COMMENT

Need more details in your narrative.

[Cancel] [Save]

The creator of the **Field Arrest** will receive a **Disapproved** notification.

## Approve or Disapprove Criminal Complaint

### ***Approval Levels***

The agency has the option to utilize a 1 or 2 level approval:

#### **1-Level Approval Process**

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

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

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

#### **2-Level Approval Process**

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

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

The supervisor approves the complaint.

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

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

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

For more information on **Maint Value** settings, refer to the Maintenance Values chapter of the *Caliber Online RMS Administrator Guide*.









### ***Approve the Complaint***


If you have permissions to approve Criminal Complaints, you receive *Criminal Complaint Approval Request* notifications when users submit Criminal Complaints for approval.

Notifications			
Count	Notification Type	Last Notification	Priority
107	Gang Alert	06/19/2020 11:25 AM CST	Urgent
3	CRIMINAL COMPLAINT APPROVAL REQUEST	06/18/2020 03:20 PM CST	High
16	DISAPPROVED INCIDENT REPORT	06/11/2020 11:32 AM CST	Urgent

For more information on Notifications refer to "Notifications" on page 21.

1. Click on the **Count** in the first column of the notification to view all *Criminal Complaint Approval Requests*.

Notifications						
Priority	Sender	Description	Sent On	Actions		
High	Simpson Homer	Criminal Complaint # 20COMP0048 requires approval. Person: Smith, Willard Officer: Charles Livingwell #2014	06/19/2020 01:18 PM CST	 		
High	Simpson Homer	Criminal Complaint # 20COMP0042 requires approval. Person: Dsfq, Joe Officer: Brandon Pangle #8888a	06/19/2020 01:16 PM CST	 		
High	Saur Christine	Criminal Complaint # 20COMP0053 requires approval. Person: Officer: Charles Livingwell #2014	06/18/2020 03:20 PM CST	 		
High	Simpson Homer	Criminal Complaint # 20COMP0060 requires approval. Person: Officer: Greg QA Wright #9696	06/17/2020 04:15 PM CST	 		

2. Click the **Select icon**  on the Criminal Complaint record you want to review.
3. The *Edit Criminal Complaint* form opens.



The approval action buttons that appear on the top right of the screen vary based on your permissions, the approval level defined by your agency, and the complaint status.

You may see one or more of the following: **Approve**, **Approve & Submit**, **Submit**, **Disapprove**. Refer to the next step for details.

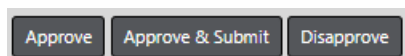
4. Review the complaint then finalize the approval by following the appropriate approval level defined by your agency:
  - [1-Level Approval Process](#)
  - [2-Level Approval Process](#)

For more information on approval levels, refer to "Approval Levels" on page 367.

For more information on updating the Criminal Complaint, refer to "Edit a Criminal Complaint" on page 258.

**1-Level Approval Process**

1. The officer supervisor performs one of the following actions:



- **Approve** - Approve the complaint.

- A brief green *Success* message appears across the top of the screen when the approval is successful. If it is not successful, a red *Failed* message appears across the top.
- Upon success, a **Submit** button replaces **Approve & Submit**, allowing you to submit to the court as a separate step later.
- Upon success, the approval process changes the Criminal Complaint status to *Approved*, and the **Approve** button no longer appears.
- If the Court Case feature is turned on for your agency and the approval is successful, the process generates a Court Case record and displays it on the complaint.

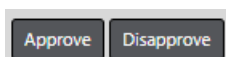
Court Case				
Court Case ID	Court Case Number	Status	Filed Date	Actions
35		Filed	06/23/2020 1026	

**NOTE:** The officer manually enters the **Court Case Number** after the Criminal Complaint is submitted and accepted by the court. The court provides the **Court Case Number**.

- **Approve & Submit** - Approve the complaint and submit the data to the court as a single action. For more information on **Submit**, refer to "Submit to Court" on the facing page
- **Disapprove** - Disapprove the complaint. For disapprove instructions, refer to [#disapprove](#).

## 2-Level Approval Process

1. The officer supervisor receives notification to approve or disapprove the complaint.



- **Approve** - Approve the complaint.
  - A brief green *Success* message appears across the top of the screen when the approval is successful. If it is not successful, a red *Failed* message appears across the top.
  - Upon success, the approval process changes the Criminal Complaint status to *Approved*, and the **Approve** button no longer appears.

- If the Court Case feature is turned on for your agency and the approval is successful, the process generates a Court Case record and displays it on the complaint.

Court Case				
Court Case ID	Court Case Number	Status	Filed Date	Actions
35		Filed	06/23/2020 1026	

**NOTE:** The officer manually enters the **Court Case Number** after the Criminal Complaint is submitted and accepted by the court. The court provides the **Court Case Number**.

- **Disapprove** - Disapprove the complaint. For disapprove instructions, refer to [#disapprove](#).
2. If approved by the officer supervisor, the court officer receives notification to submit the data to court. The court officer also has the option to disapprove the approved complaint.



- **Submit** - Submit the complaint data to the court. Refer to "Submit to Court" below.
- **Disapprove** - Disapprove the approved complaint. For disapprove instructions, refer to [#disapprove](#).

### Submit to Court

The behavior varies slightly, depending on whether your agency is utilizing **1-Level Approval Process** versus **2-Level Approval Process**.

If your agency is utilizing **1-Level Approval Process**:

1. Click the **Submit** button or **Approve & Submit** button on the complaint, whichever applies to your agency.
  - If submission is **successful**, a brief message appears across the top of your screen in green and the *Submission Status* on the Criminal Complaint changes to *Submitted* automatically.
  - If submission is **unsuccessful**, the *Submission Status* on the Criminal Complaint changes to *Submission Error* automatically. Review and update the Criminal Complaint as needed, then resubmit.

If your agency is utilizing **2-Level Approval Process**:

1. The court officer receives notification to submit the complaint data to the court.
2. Click **Submit** on the complaint.

For more information on the different approval levels, refer to "Approval Levels" on page 367.

## Disapprove

1. Click the **Disapprove** button on the *Edit Criminal Complaint* screen, then enter **Comments** and click **Save**.
2. The creator of the Criminal Complaint receives a **Disapproved** notification. The user has the option to take action, including resubmitting for approval.

For more information on users taking action, refer to "Take Action on Disapproved Notifications" on page 267.

## Incident Security

The default security for **Incident Reports** is set at the Patrol Officer level. This means anyone with Patrol Officer Security rights and above can access these reports. It is understood that some **Incident Reports** will be of a more sensitive nature and may require a higher security level to minimize the number of users that have access to the report. The security of an **Incident Report** can be done by clicking on **Change Security** from the **Incident Approve/Disapprove** screen.

Report Type	Date	Reporting Officer	Supplement Owner	Approval Status	Security Level	Actions
Original Report	12/13/2018	Christine Saur #SAUR111	Christine Saur	Initial Report	Patrol Officer	 

The **Incident Security** screen can also be accessed at any time through the **Incident Status** screen by clicking on the *Security* icon.

The screenshot shows the 'Incident Summary' for '12/13/2018 1332 Hrs - 456 Main STCT Apartment #100 Littleton, ...'. The agency is 'District 42, Versailles' and the report number is '2018D4210207 Supp #: 0'. The offense is '35-43-2-1 B03 - BURGLARY- ATTEMPTED'.

Key controls include:

- SUPP #**: Original Report
- AGENCY ONLY**:
- FOR PUBLIC RELEASE**:  Applies
- UPDATE ALL SUPPLEMENTS**:
- To All Supplements**:
- Slide the bar up or down to increase or decrease access to the Incident**: A vertical slider is positioned near the 'Allow' level, with a list of roles: Executive Command, Command Staff, Criminal Investigation Division, Records/Clerical Division, Patrol Supervisor, and Patrol Officer. Below the slider, it states '139 users have access'.
- If desired, select available security groups to provide access to the Incident**: A list of available groups includes 'NO AGENCY TEST' and 'Test 42'. A 'Selected' list is currently empty.
- RESTRICT ACCESS TO SELECTED SECURITY GROUPS**:

**Agency Only**- Selecting this button will restrict the **Incident Report** to users at your agency only.

**For Public Release**- Clicking the button to turn it gray will cause NOT FOR PUBLIC RELEASE to be printed across the top of the **Incident Report**.

**Update All Supplements** - Selecting this button updates all supplements you have access to.

**Incident Security Levels**- A user can set the Incident's security level at a level equal or less than their security rights. This means other users at that level or above would have access to the report across all agencies (unless the *Restrict to Agency Only* is selected).

**Security Groups**- Available security groups can be selected which will allow any user in the selected group to have access regardless of their individual security level. If *Restrict Access to Selected Security Groups* is selected, the **Incident Report** can only be accessed by members of the selected Security Group.

## Incident Management

### Assign Supplement

Supervisors can create a *Supplement* to an Incident Report and assign it to another user.

- Click **Assign Supplement** in Incidents menu.
- Search for and select the Incident to which you wish to create the **Supplement**.

- Click **Assign Supplement** at bottom of page.
- Enter the **Reporting Officer** you want to assign.
- Click **Assign Officer** at bottom of page.
- You will be prompted to create a comment for the officer.
- Click **Assign** at the bottom of page.
- The officer will receive a Notification regarding assignment.

### **Delete Incident Report**

Reports can be deleted by users who have ownership of the report or by Supervisors.

Once a report is selected, the user can delete the report. A confirmation screen appears and users are required to give a reason for the deletion.



The screenshot shows a dialog box titled "Delete Incident". Below the title, it says "Please enter a comment for deletion of 2019D4210218 Supp # 0". There is a text input field labeled "COMMENT" with a red vertical bar on the left side. At the bottom right of the dialog, there are two buttons: "Cancel" (yellow) and "Delete" (green).

**NOTE:** Reports that are deleted are not recoverable from the database.

### **Incident Status**

Users can view the status of a report from this location. The different report statuses are:

- Initial Report
- Pending Approval
- Approved Report

- Disapproved Report

Supervisors can use this section to change the status of a report from *Approved Report* to either *Initial* or *Disapproved* status to allow the user to edit the report. Every change in a report's status is tracked in the **Status History**.

From the Incident Status screen, click on the Change Status icon.

Report Type	Date	Reporting Officer	Supplement Owner	Approval Status	Security Level	Actions
Original Report	06/29/2018	SERGEANT-CAPTAIN-WIN Greg QA Wright #9696	Homer Simpson	Approved Report	Patrol Officer	[Edit] [Change Status] [Lock]
Supp #1	09/20/2018	SERGEANT-CAPTAIN-WIN Greg QA Wright #9696	Homer Simpson	Initial Report	Patrol Officer	[Edit] [Lock]

Change Incident Report Status

CURRENT STATUS	NEW STATUS	NOTIFY REPORT OWNER
Approved Report	<span style="border: 1px solid #ccc; padding: 2px;">-Select-</span>	<input checked="" type="checkbox"/>

REASON FOR CHANGE

Cancel
Update Status

Select a new status from the drop-down menu and enter the reason for the change, you also have the ability to select to notify the report *Owner of the Status Change*.

### Incident Status Log

This area is where users can search for an incident and obtain a *History* of the status changes and/or updates for any report.

### Incident Delete Log

Deleted reports are listed in a report log with all the pertinent information for the report, including the required reason for the deletion.

Report #	Supp #	Agency	Deletion Comment	Deleted By	Deleted Date
2017-0014	0	District 42, Versailles	Testing delete	Simpson, Homer	04/19/2017
2012ISP0000019	0	District 42, Versailles	Test	Simpson, Homer	06/21/2012
2012ISP0000021	0	District 42, Versailles	Test	Simpson, Homer	06/21/2012
2012ISP0000022	0	District 42, Versailles	Test	Simpson, Homer	06/21/2012
2012ISP0000020	0	District 42, Versailles	Test	Simpson, Homer	06/21/2012
2012ISP0000023	0	District 42, Versailles	Test	Simpson, Homer	06/21/2012
2012ISP0000018	0	District 42, Versailles	TEST	Simpson, Homer	06/15/2012

**NOTE:** Remember that deleted reports cannot be recovered.

## Using Charts to Visualize Data

**Charts** provide a mechanism to users to visualize data in a quick and efficient manner right from the home page. There are two different types of charts we offer

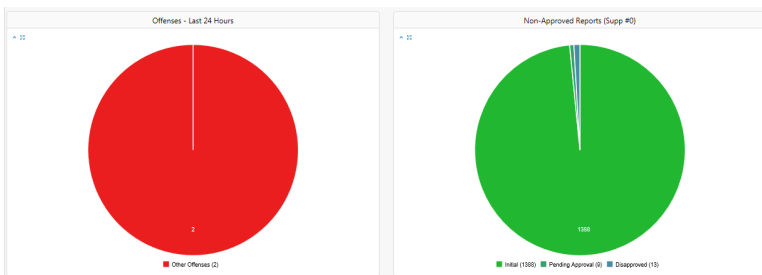
- **Non-interactive** image charts which appear right on the home page,
- A menu of **Interactive** charts which can be accessed on the right side bar.

### Home Page Image Charts

These charts are not interactive and are meant to give a very quick summary of data. As of our current release, they include:

- *Offenses - Last 24 Hours*- This is a pie chart which summarizes offense in the last 24 hours. The offenses are grouped according to their NIBRS codes to offer simple categories such as larceny, assault, etc... Note that this chart's functionality is expanded in the interactive charts Offense Activity and Snap Shot, which are described below.
- *Non-Approved Reports* - This pie chart shows counts of all initial incident reports (Supp 0) which are not approved (i.e. either in initial status, pending approval, or disapproved). A more interactive version is available in the interactive charts, described below.





Above is an example of how the image charts are shown on the Online RMS home page

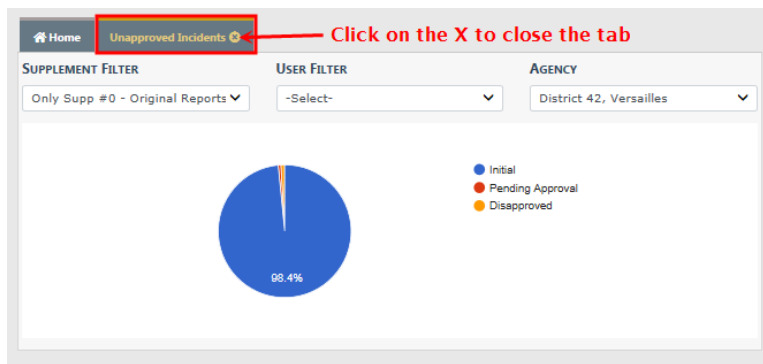
### Interactive Charts

**Interactive Charts** are accessible from the right side bar of the home screen. Look for the section labeled **Charts**.

The screenshot shows the Online RMS home page. At the top is a 'Broadcast Messages' section. Below it is a 'Notifications' table with columns for Count, Notification Type, Last Notification, and Priority. The table lists various incident-related notifications. To the right is a 'Recent Activities' sidebar with items like 'Initial Report', 'Follow Up Needed (Past 10 Days)', etc. At the bottom, there are two pie charts: 'Offenses - Last 24 Hours' and 'Non-Approved Reports (Supp #0)'. A red box highlights the 'Charts' section in the sidebar, which contains links for 'Daily Log by Time Category', 'Offense Activity', 'Open Field Arrests', 'Snap Shot', and 'Unapproved Incidents'. A red arrow points from the 'Offense Activity' link to the 'Offenses - Last 24 Hours' chart.

Count	Notification Type	Last Notification	Priority
92	INCIDENT APPROVED	02/11/2019 10:28 AM CST	High
11	APPROVE INCIDENT REPORT - CID	02/11/2019 10:26 AM CST	High
3	APPROVE INCIDENT REPORT - PATROL	02/08/2019 01:37 PM CST	High
95	INCIDENT APPROVED - FOLLOW UP CASE DECISION NEEDED	01/31/2019 02:03 PM CST	High
4	INCIDENT REVIEW REQUEST	12/14/2018 06:00 PM CST	High
16	INCIDENT FOLLOW-UP CASE - NEW SUPP FILED	12/11/2018 07:30 AM CST	High
1	INCIDENT FOLLOW-UP CASE - ASSIGNMENT ENDED	11/30/2018 03:03 PM CST	Medium
5	INCIDENT REPORT TRANSFERRED - CLERK	10/24/2018 10:59 PM CST	High
1	INCIDENT REPORT TRANSFERRED	06/19/2018 10:41 AM CST	High
6	INCIDENT FOLLOW-UP CASE TRANSFER - PATROL	05/09/2017 01:53 PM CST	High
10	INCIDENT FOLLOW-UP CASE REQUESTED - CID	05/02/2014 12:10 PM CST	High
3	INCIDENT FOLLOW-UP CASE CLOSED - CID SUPERVISOR	01/22/2014 11:44 AM CST	High
1	INCIDENT FOLLOW-UP CASE TRANSFER - CID	11/14/2013 10:30 AM CST	High

When you click on a chart link, a new tab opens on the home page to display that chart. Click on the **X** to close the tab.



Some charts have controls such as date ranges to allow you to customize the data you want to see.

Various **Interactive Charts** are available.

- Daily Log by Time Category
- Offense Activity
- Open Field Arrests
- Snap Shot
- Unapproved Incidents
- Calls for Service

### Offense Activity

This chart displays offenses, by count, for various date ranges, and even allows you to display offense counts based on the time of day. The **Select a Display** select box allows you to choose what date range you want for visualizing data. It will either display a daily or monthly view depending on which range is selected. For example, the week to date option would show a daily view; however month to date & last month has far too many days to make sense on a graph, so it is shown in a monthly view.

You can also select **Show Results by Time of Day** to change the display to group offenses based on the time of day they occurred. The time of day is split up into four hour intervals starting from midnight.

The **Agency** filter is available for multi-tiered agencies to view events at the top organization level for all agencies, or an individual agency beneath the parent organization.

Regardless of the display you select, results will be shown in color coded *Stacks*, with a legend at the bottom indicating what colors represent what offenses. You can hover the mouse over a particular section to show the offense type & count, and you can click

on a section to bring up a list of actual Incident Reports containing those offenses on that date / time.



When viewing the incidents, you can click on the **Quick Tab** icon in the *Actions* column to open another tab which will give you a summary for that Incident Report. This is similar to the Incident Summary Page, but is presented in a view-only manner to give you quick access to the report.

### Open Field Arrests

This bar chart identifies Arrests that are in *Open* or *Pending Review* status.

As a Officer Supervisor you can open the **Field Arrest Chart** and drill down to the details to either approve or disapprove the **Field Arrests**.

Hover your mouse over the blue boxes to see a total count, and click the blue boxes to display details of those counts in the bottom grid.


Click on the icons to the right to *view*  or *review*  an entry in the bottom grid. If an icon does not display, then you do not have access to that function.

- The **View** icon opens the *View Field Arrest* form. For more information on the disapproval process refer to [ApproveDisapproveFieldArrest.htm](#)

**Approve Field Arrest**
Go Back Approve Disapprove Print

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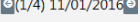
Person Information View Person

LAST NAME Aaberg	FIRST NAME Ken	DOB 07/09/1975 (Age at Time of Arrest: 38 Years Old)	SEX Male	RACE White	DRIVER'S LICENSE # 4444	
SSN 123-45-6789	ALIASES Fredd Free(Maiden)		RESIDENCE PHONE (987)-987-9876		CELL PHONE (111)-111-1111 x111	(1/4) 11/01/2016
ADDRESS (RESIDENCE) 86 North East ASHWOOD Lane, North Test DILLON						
HEIGHT 5' 02"	WEIGHT 123	EYE COLOR Brown	HAIR COLOR Auburn	COMPLEXION Albino	PLACE OF BIRTH United States of America	
CITIZENSHIP United States of America	GANGS Aqua Lungers(Active) Bold Men(Active) Automation Boys(Active)		EMPLOYER NAME Fake Org Automation	SCHOOL HERTZ Rental		

- The **Review** icon opens the *Approve Field Arrest* form, where you can *Approve*, *Disapprove*, or *Print* the **Field Arrest**. For more information on the approval process refer to [ApproveDisapproveFieldArrest.htm](#).

**Approve Field Arrest** Go Back Approve Disapprove Print

Person Information View Person

<b>LAST NAME</b> Aaberg	<b>FIRST NAME</b> Ken	<b>DOB</b> 07/09/1975 (Age at Time of Arrest: 38 Years Old)	<b>SEX</b> Male	<b>RACE</b> White	<b>DRIVER'S LICENSE</b> # 4444	
<b>SSN</b> 123-45-6789	<b>ALIASES</b> Fredd Free(Maiden)		<b>RESIDENCE PHONE</b> (987)-987-9876	<b>CELL PHONE</b> (111)-111-1111 x111		
<b>ADDRESS (RESIDENCE)</b> 86 North East ASHWOOD Lane, North Test DILLON						
<b>HEIGHT</b> 5' 02"	<b>WEIGHT</b> 123	<b>EYE COLOR</b> Brown	<b>HAIR COLOR</b> Auburn	<b>COMPLEXION</b> Albino	<b>PLACE OF BIRTH</b> United States of America	
<b>CITIZENSHIP</b> United States of America	<b>GANGS</b> Aqua Lungers(Active) Bold Men(Active) Automation Boys(Active)		<b>EMPLOYER NAME</b> Fake Org Automation	<b>SCHOOL</b> HERTZ Rental		

### Snapshot

This is a by-the-numbers chart which varies based on what features your agency has access to. Currently it contains the following:

- A count of offenses.
- A count of citations based on the citation type.
- A map showing incident data.

This chart has a **Select a Display** option which allows you to select different date ranges. It is different from other charts in the date range options it presents, as it is only meant to display very recent data.

### Unapproved Incidents

This is a more interactive version of the Non-Approved Reports chart featured on the home page. It gives you the option to display only initial incident reports (supplement 0) which are currently not approved (Initial, Disapproved, or Pending Approval), or all supplements not approved. You can click on a section of the chart to bring up a list of the incidents that fall under the category you clicked. You can then use the **Quick Tab** icon in the *Actions* column to view the details of the report.

### Calls for Service

You can view CFS event imported from CAD or directly entered via the Online RMS module. The chart provides awareness of activities for shift briefings. Time ranges allow users to view events from a prior shift or particular time frame. Geo-coded events are available for plotting on a map display. You can filter by agency and user groups.

# Chapter 21. Case Management

## Case Management Overview

**Case Management** is controlled based on one of three options selected by your agency:

- The approving officer supervisor can create a **Case** and send the notification to the CID supervisor for assignment, or not create a **Case** and not send a notification to the CID supervisor.
  - If a decision to create a **Case** is made, the supervisor creates it and assigns it to a lead investigator, and if appropriate an officer.
  - The supervisor approving the report selects a follow-up action and disposition. An *Incident Approved* notification requesting a *Follow-up Case Decision* is forwarded to a person or persons with a CID Supervisor Role (determined by the agency) for review. The CID Supervisor then reviews the **Incident** and decides to close the **Incident** without further follow-up, or to create a follow-up **Case**, and assign it to an officer.

For information on closing an Incident without a follow-up case, refer to "Close Incident with no Follow-Up Case" on page 400

- All approved Incidents are sent to the CID supervisor for a **Case** creation decision.
- No **Case** is automatically created and no notification is sent to the CID supervisor. The CID supervisor must manually create any Cases using the Case Management module.

## What is the difference between an Incident Report and a Case?

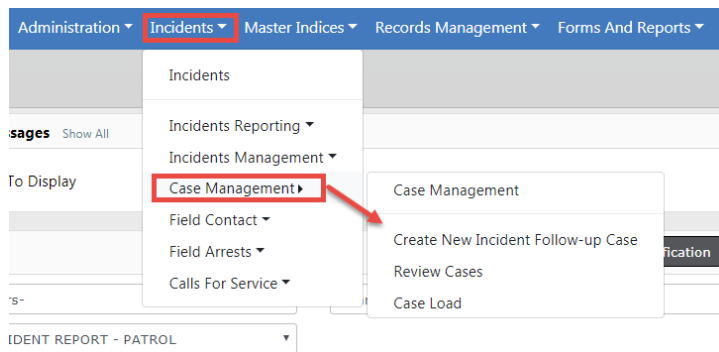
In Online RMS, when a user takes a *Report*, he creates an **Incident Report**. If the type of report written needs follow-up activity, that **Incident** can then be associated with a follow-up **Case** for investigative purposes.

A **Case** is a way to manage the investigative process for one or multiple **Incident Reports**. For example if you have several burglary reports and suspect that all the

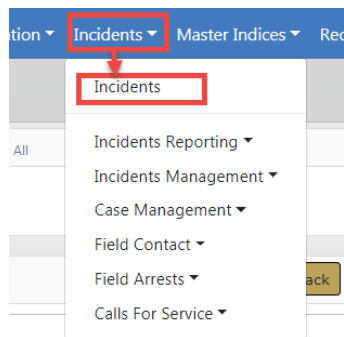
burglaries are connected, each burglary will have its own **Incident Report** but all the reports can be assigned to one **Case**. This allows anyone investigating the burglaries access to all the information in one location without having to look up the individual reports. Cases can have more than one officer assigned to them. The officers have the ability to add notes to their cases and can send those notes to their supervisors to keep them updated.

## Accessing the Case Management Module

**Case Management** functions are centrally located under the *Incidents Menu* on top *Navigation Bar*.



**Case Management** functions can also be accessed from the *Incidents Page*.



The screenshot displays a web interface with several menu sections:

- Incident Reporting**
  - Create New Incident Report
  - Create Supplement to Incident Report
  - View Incident Report
  - SmartSearch
  - Incident Mapping
  - Transfer Incident Report
  - Approve Incident Report
  - Incident Based Reporting
- Incident Management**
  - Assign Incident Report
  - Assign Supplement
  - Delete Incident Report
  - Incident Status
  - Incident Status Log
  - Incident Delete Log
  - Incident Offense Glossary
- Case Management** (highlighted with a red border)
  - Create New Incident Follow-up Case
  - Review Cases
  - Case Load
- Field Contacts**
  - Create New Field Contact
  - Search Field Contacts
- Field Arrests**
  - New Field Arrest
  - Search Field Arrests
  - Arrest Delete Log
- Calls For Service**
  - Manage Calls
  - Search Calls

A "Go Back" button is located at the bottom center of the interface.

## Case Management Form

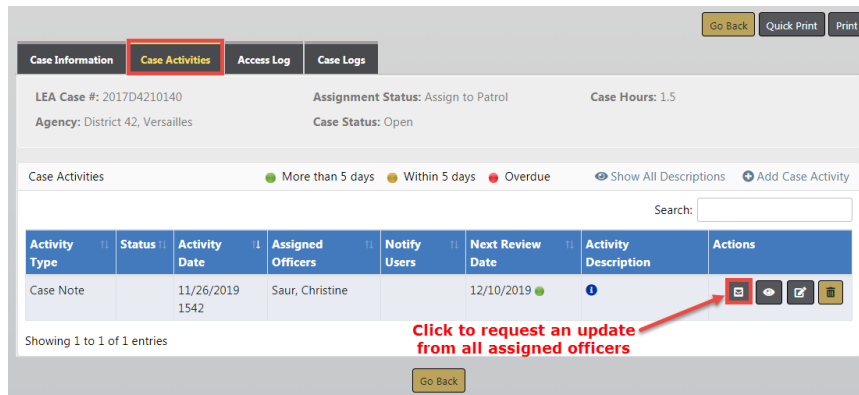
The Case Management form contains four tabs:

### 1. *Case Information*

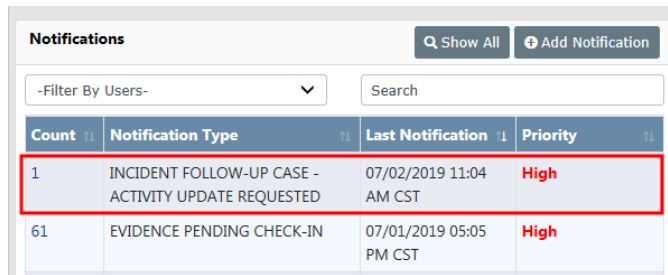
- Contains detailed information about the case, such as the case number, agency, status, security level, important dates, assigned officers, associated incidents, associated field arrests, associated field contacts, offenses, involved names and organizations, involved warrants, associated LEA cases, and attachments.

### 2. *Case Activities*

- The *Case Activities* tab contains activities on the case such as notes made by the officer or investigating officer, status and type of activity performed on the case, important dates, and the hours worked on each activity. You can also assign officers and other information when adding a Case Activity.
- On an existing Case Activity, with appropriate permissions you can request an update from all assigned officers by clicking on an icon.

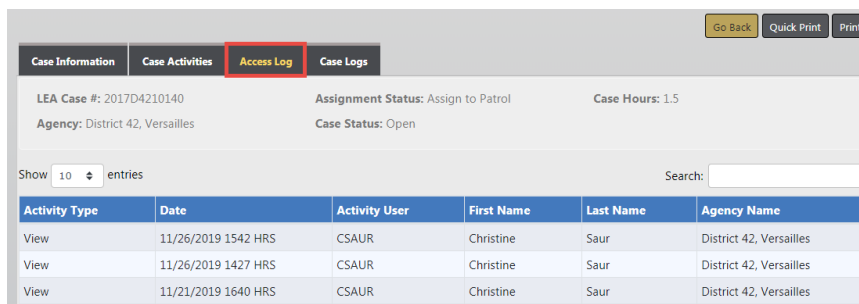


The assigned officers receive a *Notification* to update the Case Activity. The Notification appears under the *Notifications* grid on their *Home* page. For more information on Notifications, refer to "Notifications" on page 21.



### 3. Access Log

- The system automatically logs when the case is viewed or updated. The log captures the user's name, agency, and the date it occurred. The *Access Log* tab displays those log entries in a read-only format.



### 4. Case Logs

- Activity that occurs on the case.



Log Type	Notification Type	Activity Type	Created By	Creator Date	Sent To	Comments
Activity Hours Update	N/A	Case Note	Saur, Christine	11/26/2019 1546	N/A	Hours for Case Note on 11/26/2019 1542 changed from 1.5 to 1.5
Activity Hours Update	N/A	Case Note	Saur, Christine	11/26/2019 1543	N/A	Hours for Case Note on 11/26/2019 1542 changed from 0 to 1.5

## Create a Follow-Up Case

Multiple methods are available in creating a follow-up Case, depending on your permissions:

- From the initial unapproved Incident, investigators can create a case to begin working on an investigation without waiting for Incident approval.
- During the Incident review process. Incidents can be reviewed during the approval process, from a Notification, or from the Follow-Up Needed link under Recent Activities.

For information on the Incident approval process, refer to "Approve/Disapprove Incident Report" on page 353.

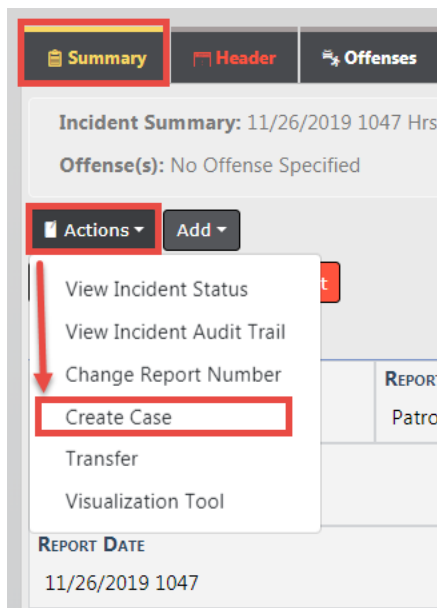
- From the Case Management menu.

For information on accessing Case Management, refer to the *Access Case Management Module* section of [CaseManagementOverview.htm](#).

## Initiate from the Initial Unapproved Incident Report

Create an investigative case directly from an initial unapproved Incident report. You must have the permission *Create Case from Unapproved Incident* to access this feature. Refer to your system administrator for details.

1. On the initial unapproved Incident report, click the **Action** button from the Summary tab, then select **Create Case** from the drop down menu.



2. The *Add Case* screen appears. Enter the Case data then save. For more information on entering data, refer to "Enter Case Data" on page 389

## Initiate through Incident Review

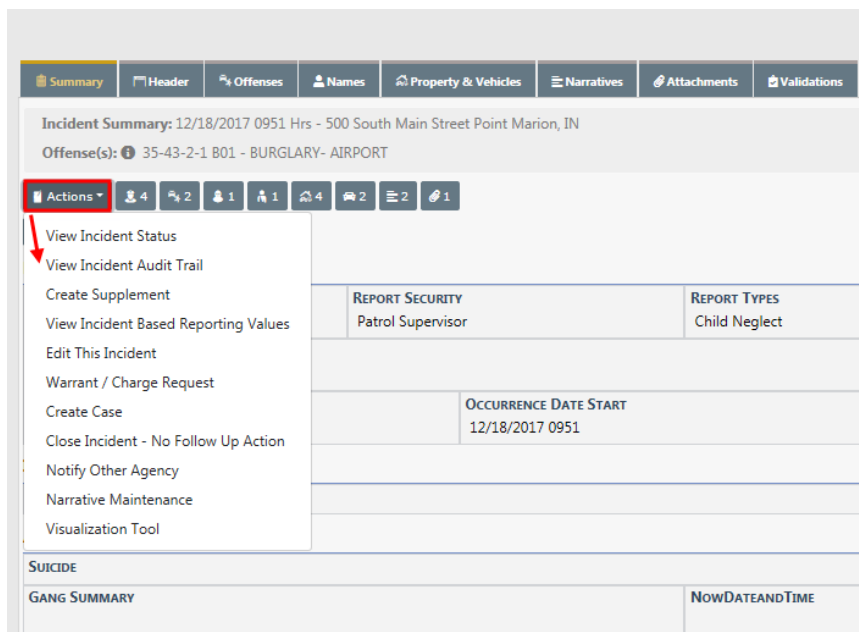
1. Create a Case while reviewing the Incident. Review the Incident by choosing one of the following methods:
  - From the Approval Process
    - The supervisor selects an **Incident Follow-up Action** of either *Follow-up Patrol*, *Follow-up CID*, or *Suspend/Pending Further Info*.

- A prompt appears to approve the Incident and create a **Case**. Electing to approve creates the **Case** and allows you to assign a Lead Investigator, and if appropriate, assign officer(s) to follow up with the Incident.
- From a Notification
  - Users with the CID Supervisor role (determined by the agency) can review the report from the Notification.
- From the Follow-Up Needed link under Recent Activities
  - Click on the *Follow-Up Needed* link to review the Incident report and make the decision on whether or not to create a **Follow-up Case** to the Incident, or close the Incident without a follow-up case.

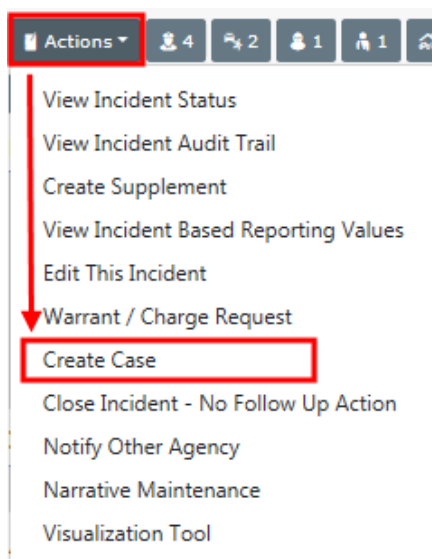
Recent Activities	
Initial Report	18
Follow Up Needed (Past 10 Days)	1
Pending Approval	2
My Cases (Active Count)	1
Evidence Review	4

For information on closing an Incident without a follow-up case, refer to "Close Incident with no Follow-Up Case" on page 400

- Review the Incident using whichever method you wish, then click on the **Actions** button on the top left of the Incident Summary tab to view menu options.



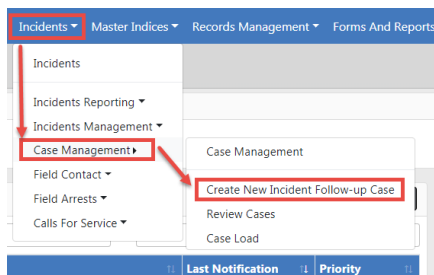
- The CID Supervisor selects the **Create Case** menu option.



- The *Add Case* screen appears. Enter the Case data then save. For more information on entering data, refer to "Enter Case Data" on the facing page

## Initiate from the Case Management Menu

1. Create a Follow-Up Case from the Case Management Menu.



For additional methods of accessing the Case Management menu, refer to the *Access Case Management Module* section of [CaseManagementOverview.htm](#)

2. The *Add Case* screen appears. Enter the Case data then save. For more information on entering data, refer to "Enter Case Data" below

## Enter Case Data

You can enter Case data when you create a new Case or update an existing Case.

1. If you are creating a new Case, initiate a new Case Follow-Up by using an available method. For details on the available methods, refer to "Create a Follow-Up Case" on page 385.

The *Add Case* page appears.

The screenshot shows a form titled 'Add Case'. It has several sections: 'AGENCY' with a dropdown menu showing 'District 42, Versailles'; 'ASSIGNMENT STATUS' with a dropdown menu showing 'Assign to Patrol'; 'SOLVABILITY' with a dropdown menu showing '-Select-'; 'CASE STATUS' with a dropdown menu showing 'Open'; 'NEXT UPDATE DUE' with a date field showing '07/09/2019' and a 'Set Next Default Date' button; and 'COMMENTS' with a large text area. At the bottom of the form are two buttons: 'Go Back' and 'Save'.

Enter necessary data then click the **Save** button to open the *Edit Case* screen.

2. If you are updating an existing Case, search for the Case then choose update to open the *Edit Case* screen. For more information on searching for and updating a Case, refer to "Review Cases" on page 403
3. The *Edit Case* screen contains four tabs: Case Information, Case Activities, Access Log, Case Logs. The *Case Information* tab opens by default. For general information about the four tabs, refer to "Case Management Overview" on page 381.

The screenshot shows the 'Edit Case' interface with the following details:

- Case Information Tab:** Active tab.
- LEA Case #:** 00000162CASE2019
- AGENCY:** District 42, Versailles (with a 'Transfer' button)
- ASSIGNMENT STATUS:** Assign to Patrol
- SECURITY LEVEL:** Patrol Supervisor (with a 'Change Security' button)
- SOLVABILITY:** -Select-
- CASE STATUS:** Open
- NEXT UPDATE DUE:** 12/17/2019 (with a 'Set Next Default Date' button)
- CASE ACCESS USERS:** (with an information icon)
- CASE HOURS:** 0 Hrs, 0 Min (with an 'Update Case Hours' button)
- COMMENTS:** A large text area for adding notes.
- Section A:** A section header for additional data entry.
- DATE AND TIME:** Fields for recording the date and time of the update.

4. Select an **Assignment Status** which allows the assignment of the case to either Patrol or CID. A **Case Status** must also be chosen. Set a **Solvability** to the Case, set an **Next Update Due**, and add a **Comment**.
5. The **LEA Case #** generates automatically. If you chose to change the **LEA Case #**, you will have to select the icon and you (depending on the permission within the agency) will be able to change the **Case #**.
6. The CID Supervisor has the ability to change the security level of the Case by clicking on the **Change Security** button to open the *Edit Case Security* screen. After changes are made, click **Save** to return to the *Edit Case* screen.  
  
For more information on setting the security level, refer to "Set Case Security Level" on page 398.
7. Next, the CID Supervisor will select the **Solvability** of the Case from the drop-down.
8. The CID Supervisor has the ability to change the **Next Update Due** date. The default is 60 days.
9. Next is the **Assignment Status**. The selections available vary by agency.
10. Next, the CID Supervisor will choose the **Case Status** from the drop-down selection.

11. The CID Supervisor has the ability to hover over the information bubble near the **Case Access Users** to see all the individuals who have access to the Case. If the CID Supervisor chooses to change the **Security level** of the case, they will select the **Change Security** button and select the security level to which they feel appropriate for the Case. Remember, if a patrol officer is assigned to the Case and Case is set at the *Criminal Investigations Division*, the Patrol Officer will not be able to access the Case.
12. Each Officer and Supervisor assigned to the Case has the ability to log the Case hours by using the **Case Hours** fields. After selecting the appropriate hours, select **Update Case Hours**.
13. Finish completing the upper section of the Case, then select the **Update** button.

**Note:** There are icons located under the *Actions* column throughout the remaining sections of the Case. Hover your mouse over each icon for a description of what each one does: Review incident security/status, view incident, create a new supplement, associate an incident, print, and delete.

14. Page down to the *Assigned Officer(s)* section. Click on the **Assign Officer** link to assign an officer.

**Assigned Officer(s)** **Note:** One Lead Investigator Officer is required. [Assign Officer](#)

**NOTE:** One Lead Investigator Officer is required. The CID Supervisor must assign a Lead Incident Officer.

For more information on assigning officers, refer to [#AssignCaseOfficer](#).

15. When at least one officer is assigned, a **View Assignment History** link appears in the *Assigned Officer(s)* section.


## Assigned Officer(s)

Click the link to view the assignment history.

<a href="#">Go Back</a>					
LEA Case #: 00000162CASE2019		Assignment Status: Assign to Patrol		Case Hours:	
Agency: District 42, Versailles		Case Status: Open			
Start Date	End Date	Assigned To / Role	Assigned By	Ended By	End Comments
11/26/2019 1615 Hrs		SERGEANT-CAPTAIN-WIN Greg Wright / Assisting Officer	Christine Saur		
11/26/2019 1612 Hrs		Christine Saur / Lead Investigator	Christine Saur		

Click **Go Back** to return to the Case.

- Page down to the *Associated Incident(s)* section. The CID Investigator and the Assigned Lead Investigator has the ability to click on **Create Incident** to create a new Incident from the Case, or click on **Associate Incidents** to associate other Incidents to the same case. For details, refer to "Associate an Incident" on page 395.

With proper permissions, you can create a Supplement by clicking on the Create Supplement icon  under the *Actions* column on Summary tab of the Incident form. For more information about creating a Supplement, refer to "Create Supplements" on page 237.

**Note:** Offenses associated with the Incident appear in the Offenses section as read-only.

- To associate field arrests to the case, click on **Associate Field Arrests** in the *Associated Field Arrests* section. For more information on associating field arrests, refer to "Associate a Field Arrest" on page 397.
- To associate field contacts to the case, click on **Associate Field Contact** in the *Associated Field Contacts* section. For more information on associating field contacts, refer to "Associate a Field Contact" on page 397.
- Offenses that exist on Associated Incidents appear for convenience in the **Offenses** section as read-only.

Offenses					
Offense	Remarks	Status	Status Date/Time	Incident Report#	Supp #
14-23-7-5 - NATURAL RESOURCE- OPEN BURNING IN EMERGENCY FIRE HAZARD AREA		Open/Pending	11/26/2019 10:47	2019D4210232	0

- Involved persons and organizations on Associated Incidents appear for convenience in the **Involved Names and Organizations** section as read-only. You have the option to show or hide the details by clicking the **Show/Hide** button.

Involved Names and Organizations				Show/Hide
Summary	Role	Associated Event #	Photo Lineup	
Poharcyk, Robin RACE:White SEX:Female DOB: 01/10/1910(109)	Suspect / Offender	Incident Report# - 2019D4210232		

Involved Names and Organizations				Show/Hide
----------------------------------	--	--	--	-----------

- Associated evidence appears in the **Involved Property** section as read-only.



Involved Property							Schedule Disposition	Show/Hide
Summary	Current Status	Associated Event #	Evidence	Evidence Status	Evidence Location	Scheduled Disposition Date	Actions	
Type: DRUGS - COMMON MEDICINE Drug: SUSPECTED COCAINE Quantity: 1 Fluid ounce	Seized	Incident Report # - 2014ISP0000410 Supp# 0	No					

If you have appropriate permissions, you can schedule one or more dispositions of associated evidence directly from the case and notify evidence custodian.

- a. Click **Schedule Disposition** to open *Schedule Evidence Disposition*.

Schedule Evidence Disposition

Check this box to select all items in the grid

	Summary	Current Status	Associated Event #	Scheduled Disposition Date
<input type="checkbox"/>	Type: ART OBJECT Serial #: ASDF Value(\$): 300	Stolen	Incident Report # - 2017D4210140 Supp# 1	
<input checked="" type="checkbox"/>	Type: SEEDS Drug: SUSPECTED BARBITURATES Quantity: 2	Stolen	Incident Report # - 2017D4210140 Supp# 1	10/31/2019
<input checked="" type="checkbox"/>	Type: DRUGS - COMMON MEDICINE Drug: CrazyDrug Quantity: 1	Stolen	Incident Report # - 2017D4210140 Supp# 1	

DISPOSITION DATE

COMMENT

NOTIFY EVIDENCE CUSTODIANS

- b. Check each evidence record that applies, or check the box on the upper left to select all evidence records.
- c. Enter the **Disposition Date** and **Comments**.
- d. Check the **Notify Evidence Custodians** box, if applicable.
- e. Click **Save**.


22. Involved Warrants appear in the **Involved Warrants** section as read-only.

23. Click the **Associate LEA Case** link to associate LEA Cases.

24. Attach a form in the **Attached Forms** section by selecting from the list.

25. Click the **Add Attachment** link to add attachments to the Attachments section. Attachments can be photos or documents.

## Assign Officer to Case

- To **Assign** an officer to the Case, click the **Assign Lead Incident Officer** or **Assign Officer** link.
  - The **Assign Lead Incident Officer** link only appears when a lead Incident officer has not yet been assigned. It defaults the case to the officer who created the incident report. That officer can then be assigned to the case as the lead or as an assisting officer.
  - The **Assign Lead Incident Officer** link directly assigns the reporting officer to the case and the supervisor selects their role.
- If the **Assign Officer** link is used, choose from a list of officers to assign to the case. Click the select icon  to choose an officer from the results list.









**Search Parameters** Go Back

AGENCY FILTER  
 Case Agency  My Organization

OFFICER FILTER Use HISTORICAL DATA  OPTIONAL SEARCH TEXT  
 All  Detectives  Patrol

Enter search text  Search By

Reset Search

Officer Name	Title	Agency	Date Last Assigned	Open Assignments	Actions
Christine Saur - #SAUR111		District 42, Versailles	06/18/2019 02:15 PM CST	2	 
Greg QA Wright - #9696	SERGEANT-CAPTAIN-WIN	District 42, Versailles	06/18/2019 02:15 PM CST	52	 
Jeff Hanover - #96965	Officer Supervisor	District 42, Versailles	09/23/2013 10:11 PM CST	1	 
ODL User - #123456		District 42, Versailles	08/29/2019 11:56 AM CST	0	 

Go Back

- Select the **Role** and **Assignment Date**. Optionally, select the **Notify User** box to send an informational Notification to officer.

Officer Name	Title	Internal ID/Badge#	Date Last Assigned	Open Assignments
Saur, Christine		SAUR111	06/18/2019 02:15 PM CST	2

ROLE ASSIGNMENT DATE

Lead Investigator 11/26/2019 1612

COMMENTS

NOTIFY USER

Go Back Save Save & Assign Another Officer

**Note:** You can also assign officers when creating a Case Activity. For more information on creating Case Activities, refer to "Create Case Activity" on page 407.

## Associate an Incident

You can associate an Incident by either creating an Incident directly from the Case or selecting an existing Incident. Page down to the *Associated Incident(s)* section of the Case and click either the **Create Incident** or **Associate Incident** link.

Associated Incidents						<a href="#">+ Create Incident</a> <a href="#">+ Associate Incident</a>
Report #	Incident Summary	Offenses	Comments	Date Of Info	Associated Event #	Actions

### Create Incident

1. To create an Incident and associate it to the Case, click the **Create Incident** link.
2. A message appears informing you the newly created Incident will automatically be associated with the Case. Click **No** to return to the Case without creating the Incident, or click **Yes** to create the Incident and continue to the next step.

Message From RMS

---

You are about to create a new incident. Once the incident is created, it will automatically be associated with this case. Do you want to proceed?

3. If you chose to create the Incident, an *Incident Report Number and Summary* screen appears. Review and make any necessary changes. Enter comments into the **Medial/Crime Summary** text box, then click the **Finished-Go To Next Section** button.

**Incident Report Number and Summary**

Please verify the following information and click finished to create a new incident report

**AGENCY**  
 District 42, Versailles

**REPORT #**  
 Auto Generated

**SECURITY LEVEL**  
 Patrol Officer

**MEDIA/CRIME SUMMARY** Check Spelling  
 Creating an Incident directly from a Case.

Go Back
Finished - Go To Next Section

- The Incident Report wizard opens. Add the necessary information to the Incident Report. Click the **Exit Report** button on the top of the screen at any time to return to the Case. For more information on entering data into various tabs of the Incident Report, refer to "Incident Report Tabs" on page 172.

Exit Report
Quick Print
Print
Transfer
Exit Wizard
Submit For Approval

Summary
Header
Offenses
Names
Property & Vehicles
Narratives
Attachments
Validations

Incident Summary: 06/18/2019 1457 Hrs Agency: District 42, Versailles  
 Offense(s): No Offense Specified Report #: 2019D4210230 Supp #: 0

Types & Times
Location
Officers

**Header Information**

REPORT SECURITY: Patrol Officer  
 FOR PUBLIC RELEASE: Yes  
 REPORT AGENCY / DISTRICT: District 42, Versailles Change

**MEDIA/CRIME SUMMARY** Check Spelling  
 Creating an Incident directly from a Case.

- The newly created Incident Report appears in the *Associated Incidents(s)* grid of the Case.

**Associated Incidents** 
[+ Create Incident](#)
[+ Associate Incident](#)

Report #	Incident Summary	Offenses	Comments	Date Of Info	Associated Event #	Actions
2019D4210232	11/26/2019	<span style="color: blue;">i</span>		11/26/2019	This Case	<span style="color: red;">!</span> <span style="border: 1px solid black; padding: 2px;">E</span> <span style="border: 1px solid black; padding: 2px;">E</span> <span style="border: 1px solid black; padding: 2px;">E</span> <span style="border: 1px solid black; padding: 2px;">E</span>

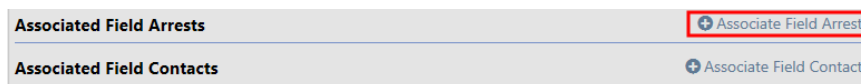
### Associate Existing Incident


- To associate an existing Incident, click the **Associate Incident** link to open the *Incident Search* screen.

2. Search for the Incident and select it from the results grid. For more information on searching for Incidents, refer to "View Incident Reports" on page 222.
3. The selected Incident Report appears in the *Associated Incidents(s)* grid of the Case.

## Associate a Field Arrest

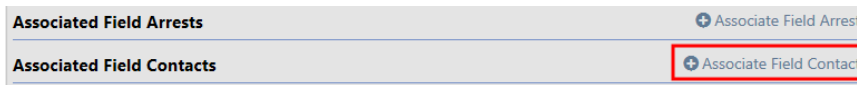
1. To associate a Field Arrest to the Case, click the **Associate Field Arrest** link.




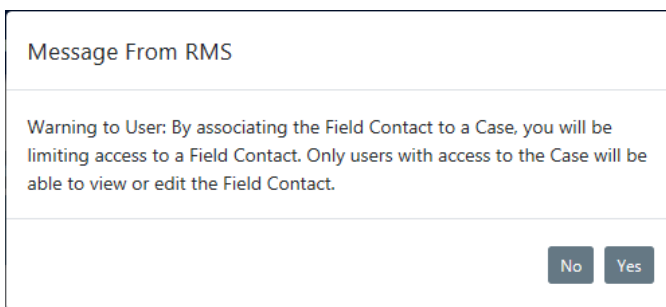
2. A *Field Arrest Search* screen appears.
3. Search for the Field Arrest you want to associate to the Case. For details on searching for a Field Arrest, refer to "Search Field Arrests" on page 292.
4. Select the appropriate Field Arrest from the results grid by clicking on select icon  in the *Actions* column. The selected Field Arrest then appears under the *Associated Field Arrests* section of the Case.

## Associate a Field Contact

1. To associate a Field Contact to the Case, click on the **Associate Field Contact** link.



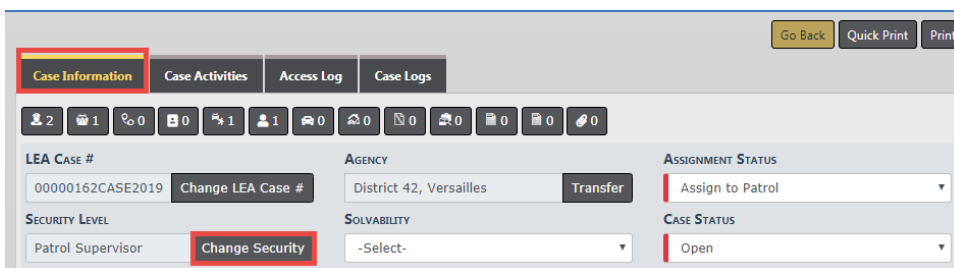
2. A *Field Contact Search* screen appears.
3. Search for the Field Contact you want to associate to the Case. For more information on searching for a Field Contact, refer to "Search for a Field Contact" on page 338.
4. Select the appropriate Field Contact from the results grid by clicking on select icon  in the *Actions* column.
5. A warning message appears informing you that by associating the Field Contact to the Case, limited access to the Field Contact occurs. Only users with access to the Case are able to view or edit the Field Contact. Click **No** to return to the Case without associating the Field Contact, or click **Yes** to associate the Field Contact to the Case.



6. If you chose **Yes**, the selected Field Contact then appears under the *Associated Field Contacts* section of the Case.

## Set Case Security Level

1. To set the **Security Level** of the Case go to the top of the Case Information tab. Click the **Change Security** button to display the *Security Setting* screen.



LEA Case #: 00000162CASE2019      Assignment Status: Assign to Patrol      Case Hours:

Agency: District 42, Versailles      Case Status: Open

Slide the bar up to allow/increase access to case  
Slide the bar down to restrict/decrease access to case  
Current Security Level: Patrol Supervisor

Security Group(s): If desired, select available security groups to provide access to case  
Security Group users have view access only

**Case Access Levels**

Allow  
Executive Command  
Command Staff  
Criminal Investigation Division  
Records/Clerical Division  
Patrol Supervisor  
Patrol Officer  
141 users have access

Restrict

AGENCY ONLY

**Case Workgroups**

NO AGENCY TEST  
Test 42

RESTRICT ACCESS TO SELECTED WORKGROUPS

Go Back   Save

The CID Supervisor only has the ability to restrict up to the level of *Criminal Investigations Division*. If they restrict further, they would not have access to the Case. At this point, the CID Supervisor has the ability to see what users have access to the Case.

- To adjust the security slide the bar up or down that is located just left of the **Case Access Level**. Sliding the bar up will allow more users access to the case, sliding the bar down will restrict access. Security can further be adjusted by assigning the case to a **Security Group**. Anyone within the **Case Access Level** box, and persons included in the **Security Group**, will have access to the case. If the box located below the **Security Group** is checked, this will restrict access to only persons in the **Security Group** and the officer assigned to the case.

**NOTE:** If the user making the assignment is not part of the **Security Group** they will not have access to the case if the **Restrict Access** box is checked.

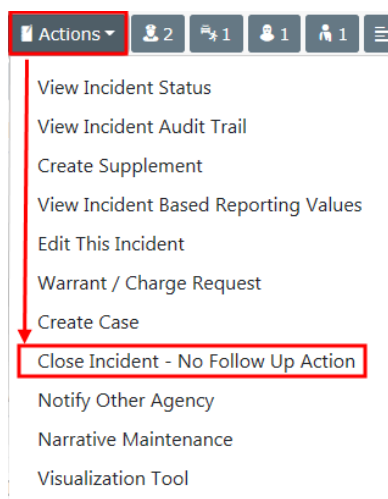
- Click the **Save** button.

Ensure that person(s) who are not supposed to have access to the incident report cannot access the report; the incident security must be set. Associating a report to a “Case” which has restricted access will NOT restrict access to any incident report associated with that case. The incident report security has been restricted as well if you want to secure the incident report access. Incident security can be set at the time of approval of the report or by the USER reviewing the incident report. The supervisor reviewing the “incident report” cannot restrict access above his level. This prevents anyone from “locking” themselves out of the report.

The Lead Investigator along with the CID Supervisor needs to remember that if the Case security is changed, it does not automatically change the security of the associated Incident Report. The Lead Investigator and/or CID Supervisor must also change the security of the Incident Report if deemed appropriate.

## Close Incident with no Follow-Up Case

To close an incident from the review process with no **Follow-up Case** needed, the CID Supervisor selects the **Close Incident – No Follow Up Action** menu option from the **Actions** button.



A window appears where the **Incident Disposition** is selected from a list, then select the **Close** button to close the incident with no case follow-up.

The CID Supervisor can also keep an Incident, but not create a **Case**:

When the CID Supervisor decides a **Case** should not be created for the Incident, they select *Closed-No Action* for the **Follow-up Action** and select the reason for the **Incident Status/Disposition**. Select an **Incident Status**. The report can then be approved by selecting the **Approve** button.

For more information on the Incident approval process, refer to "Approve/Disapprove Incident Report" on page 353.



The screenshot displays the 'Incident Summary' section with the following information:

- Incident Summary: 09/19/2017 1212 Hrs - 200 Main Apartment #...
- Agency: District 42, Versailles
- Offense(s): 15-17-18-6 - AGRICULTURE/ANIMAL- IMPORT DISEAS...
- Report #: 2017D4210126 Supp #: 0
- Total Hours: 0

Below the summary are tabs for 'Approval Options', 'Incident', and 'Offense Glossary'. The 'Approval Options' tab is active, showing 'Approve' and 'Disapprove' buttons. A red arrow points to these buttons with the text 'Click to approve or disapprove'. Below this are buttons for 'Security Level Patrol Supervisor', 'Agency Only No', and 'Change Security'.

The 'INCIDENT FOLLOW-UP ACTION' section has a dropdown menu set to 'Closed- No Action'. A red arrow points to this dropdown with the text 'Click and select an action from the list'. To the right is the 'INCIDENT STATUS / DISPOSITION' dropdown set to '-Select-'.

The 'ROUTE TO EXTERNAL AGENCY' section has an unchecked checkbox.

The 'Notifications To Be Sent' section contains a table:

Send	Notification	Destination Agency
<input checked="" type="checkbox"/>	INCIDENT APPROVED	District 42, Versailles

Below the table is a text area labeled 'ENTER NOTIFICATION COMMENTS HERE'.

The 'Other Options' section includes:

- FOR PUBLIC RELEASE (Applies To All Supplements)
- NOTIFY PROSECUTOR OF WARRANT / CHARGE REQUEST

At the bottom are buttons for 'Go Back', 'Approve', and 'Approve & Print'.

## Navigating Throughout the Case

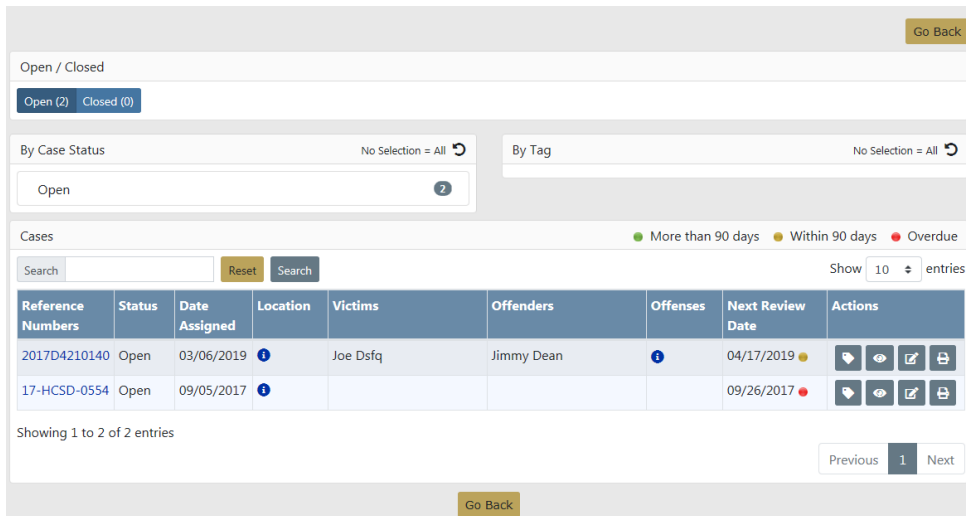
When a Lead Investigator and/or Officer is assigned a case, in their **Recent Activities** they will see a number next to *My Cases*.

The screenshot shows a 'Recent Activities' list with the following items:


- Initial Report 18
- Follow Up Needed (Past 10 Days) 1
- Pending Approval 2
- My Cases (Active Count) 2

The 'My Cases (Active Count) 2' item is highlighted with a red rectangular box.

Select the number and the **My Active Cases** screen opens.

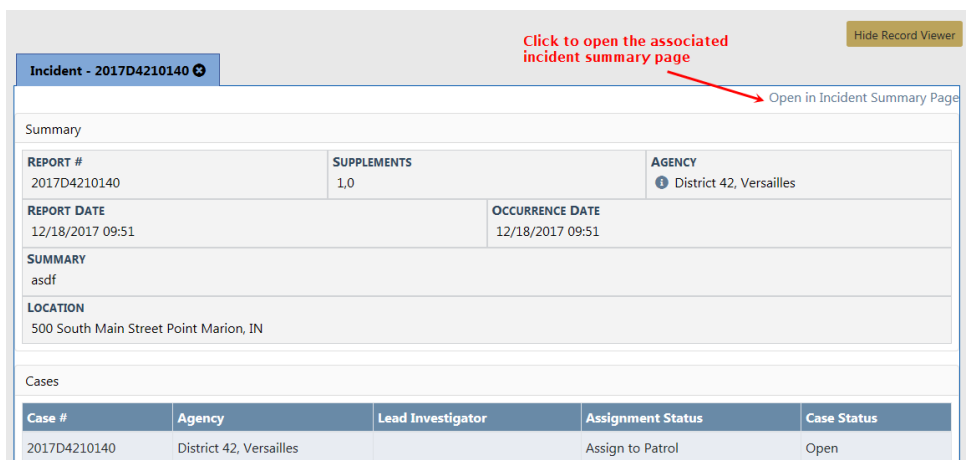


From this screen you have the ability to view the location of the Case by hovering over the **Information** icon. At this point you have the ability to view the entire entry by selecting **Click to view Entire Entry** at the bottom left of the **Location** box.

Using the **Tag** icon  you can tag cases with keywords you choose, to group cases based on similar actions, suspects, or other information. For more information on tags, refer to "Investigative Case Tags" on page 416.

If offenses are associated with the Incident, hover over the **Information** icon under the *Offenses* column, to see the *Associated Offenses*.

By selecting the hyper-link under *Reference Numbers* you are taken directly to the **Record Viewer** which is a snapshot of the Case.



If you select the hyper-link **Open in Incident Summary** page it will open the associated incident at the **Summary** page.



Exit Report Quick Print Print

Summary Header Offenses Names Property & Vehicles Narratives Attachments Validations

Incident Summary: 12/18/2017 0951 Hrs - 500 South Main Street Point... Agency: District 42, Versailles  
Offense(s): 35-43-2-1 B01 - BURGLARY - AIRPORT Report #: 2017D4210140 Supp #: 0

Actions 4 2 1 1 4 2 2 1 Status Open / Open (03/06/2019)  
2 / 2 2 Approved Report State Status SENT WAITING FOR RESPONSE

Follow-Up Incident Cases

Case #	Agency	Lead Investigator	Assignment Status	Case Status	Next Update Due	Actions
2017D4210140	District 42, Versailles	M, Dana - Lead Investigator	Assign to Patrol	Open	04/17/2019	 

Report Header

REPORT ID 3036	REPORT SECURITY Patrol Supervisor	REPORT TYPES Child Neglect
SUMMARY asdf		
REPORT DATE 12/18/2017 0951	OCCURENCE DATE START 12/18/2017 0951	OCCURENCE DATE END

In the section *Follow-Up Incident Cases* you will have the ability to either view or edit (based on your permissions) the Case.



Exit Report Quick Print Print

Summary Header Offenses Names Property & Vehicles Narratives Attachments Validations

Incident Summary: 12/18/2017 0951 Hrs - 500 South Main Street Point... Agency: District 42, Versailles  
Offense(s): 35-43-2-1 B01 - BURGLARY - AIRPORT Report #: 2017D4210140 Supp #: 0

Actions 4 2 1 1 4 2 2 1 Status Open / Open (03/06/2019)  
2 / 2 2 Approved Report State Status SENT WAITING FOR RESPONSE

Follow-Up Incident Cases

Case #	Agency	Lead Investigator	Assignment Status	Case Status	Next Update Due	Actions
2017D4210140	District 42, Versailles	M, Dana - Lead Investigator	Assign to Patrol	Open	04/17/2019	 

Also from the **View Case** page, you have the ability to view the *Case Activities*, *Access Log*, and *Case Logs* tabs.

View Case Case Activities Access Log Case Logs

2 1 2 2 1 4

Case Information

LEA Case #  
2017D4210140

## Review Cases

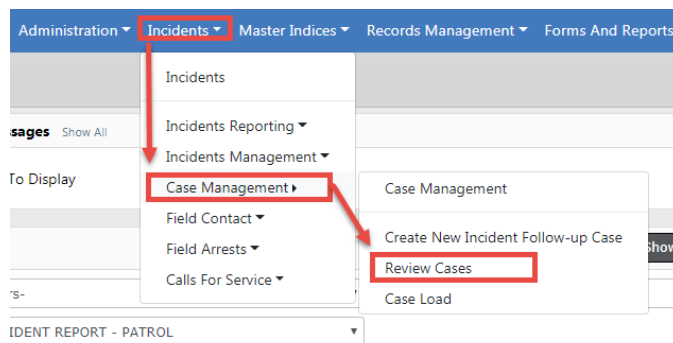
You can search for and review selected Cases to which you have permissions. Review mode provides read-only details of the Case and a data summary of each module to which the Case is linked:

- Assigned Officers
- Incidents
- Associated Field Arrests
- Offenses
- Involved Names and Organizations
- Involved Vehicles
- Involved Warrants

**Note:** While Review mode is read-only, you have the option to toggle to edit mode to apply updates.

To review the Case:

1. From the **Incidents** menu, select **Case Management**, then **Review Cases** to open the *Case Search* screen.



2. Enter the criteria you for which to search. The *Additional Search Criteria* drop down box provides more search options such as, *Field Contacts* and others.

3. Click **Search** to open the *Search Results* page with the records that match your search criteria.

Next Review Indicators: ● More than 90 days ● Within 90 days ● Overdue

LEA Case #	Status	Assignment Status	Next Review Date	Creation Date	Assigned Officer	Incident Summary	Actions
00000155CASE2019	Open	Assign to Patrol	07/10/2019 <span style="color: orange;">●</span>	06/19/2019			
2019D4210216	Open	Assign to Patrol	07/09/2019 <span style="color: orange;">●</span>	06/18/2019	WRIGHT, GREG QA - Lead Investigator	2019D4210216 2019D4210230	
00000154CASE2019	Open	Assign to Patrol	07/08/2019 <span style="color: orange;">●</span>	06/17/2019			
2018D4210202	Open	Assign to Patrol	04/24/2019 <span style="color: red;">●</span>	04/03/2019		2018D4210202	
00000153CASE2019	Open	Assign to Patrol	04/23/2019 <span style="color: red;">●</span>	04/02/2019		2019D4210226	

4. You can hover over the information icon to display additional information.

<b>AGENCY</b> District 42, Versailles	<b>ADDRESS</b> 902 South Adams Street Versailles IN 47042	
<b>PHONE</b> 317-555-1717	<b>POC</b> District	

5. The *Next Review Date* column uses three color indicators that quickly identifies cases with upcoming review dates, or have surpassed the next review date.

● More than 90 days 
 ● Within 90 days 
 ● Overdue

LEA Case #	Status	Assignment Status	Next Review Date	Creation Date
00000156CASE2019	Open	Assign to Patrol	07/10/2019	06/19/2019
00000155CASE2019	Open	Assign to Patrol	07/10/2019	06/19/2019
2019D4210216	Open	Assign to Patrol	07/09/2019	06/18/2019
00000154CASE2019	Open	Assign to Patrol	07/08/2019	06/17/2019
2018D4210202	Open	Assign to Patrol	04/24/2019	04/03/2019

6. The icons in the *Actions* column allows you to act on the Case such as, *Add Case Activity*, *View*, or *Edit*, respectively. If you do not see one or more of these icons, then you do not have permissions to perform that particular action.



- a. Click on the **Add Case Activity** icon to add an activity. For more information on adding a Case Activity, refer to "Create Case Activity" on the facing page.
- b. Or click the **View** icon to open the Case in view-only mode.

Go Back
Quick Print
Print
Edit Case

View Case
Case Activities
Access Log
Case Logs

2
2
1
1
1
2
1
1
1
1


**Case Information**

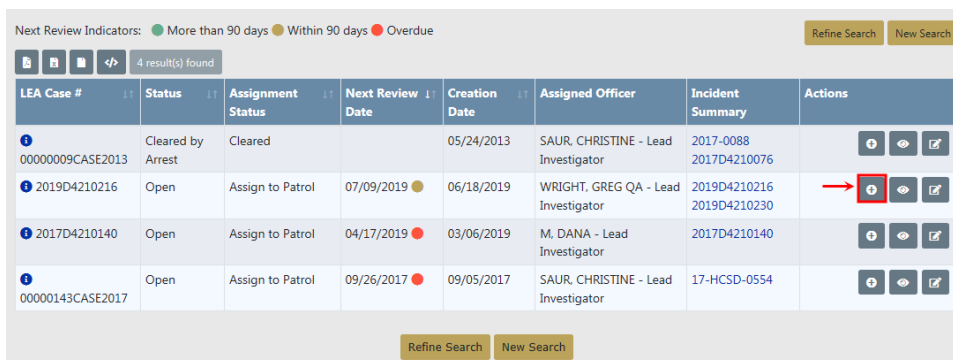
LEA CASE # 2019D4210216	AGENCY District 42, Versailles	ASSIGNMENT STATUS Cleared
SOLVABILITY	CASE STATUS Closed	NEXT UPDATE DUE
COMMENTS		


- c. Or click the **Edit Case** icon to open the Case in edit mode and make necessary updates to the Case.  
 For details on entering information on the Case Information tab, refer to "Enter Case Data" on page 389.  
 For details on entering information on the Case Activities tab, refer to "Create Case Activity" on the facing page.  
 For details on the contents of the Access Log, refer to "Case Management Overview" on page 381.

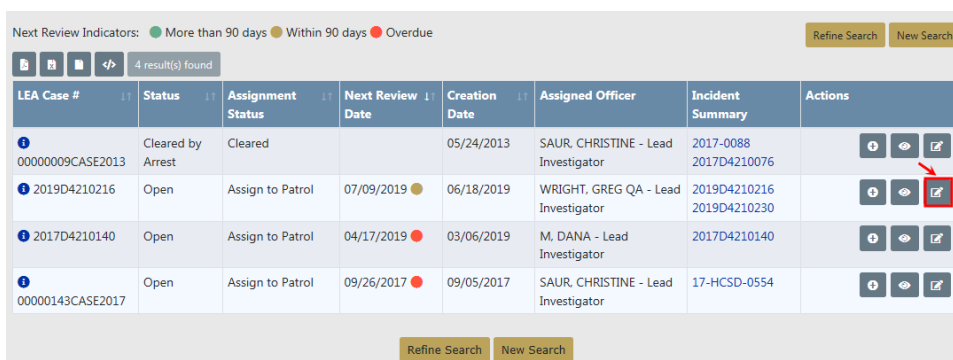
# Create Case Activity

The *Case Activities* tab of a Case contains activities on the case such as notes made by the officer or investigating officer, status and type of activity performed on the case, important dates, and the hours worked on each activity. You can also assign officers when adding a **Case Activity**.

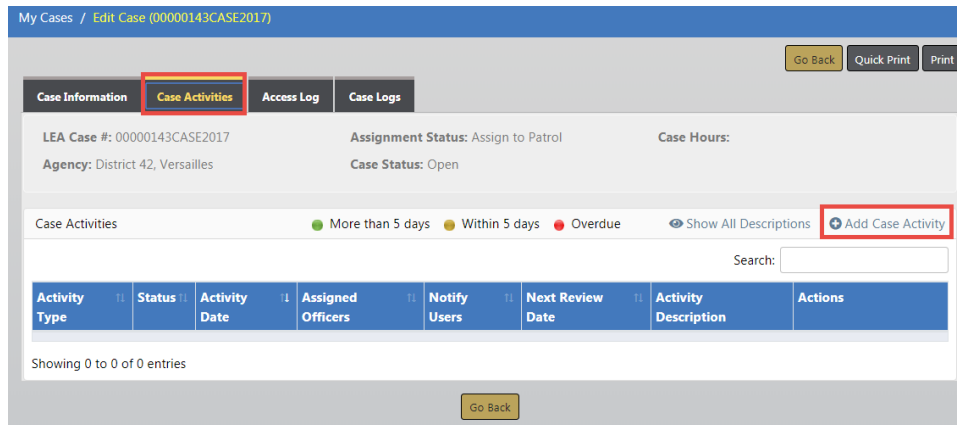
1. Use one of two methods to initiate a new **Case Activity** record.
  - From the *Case Search Results* screen. For instructions on Case searching, refer to "Review Cases" on page 403.
    - Search for and locate the Case, then click on the **Add Case Activity** icon  in the *Actions* column.



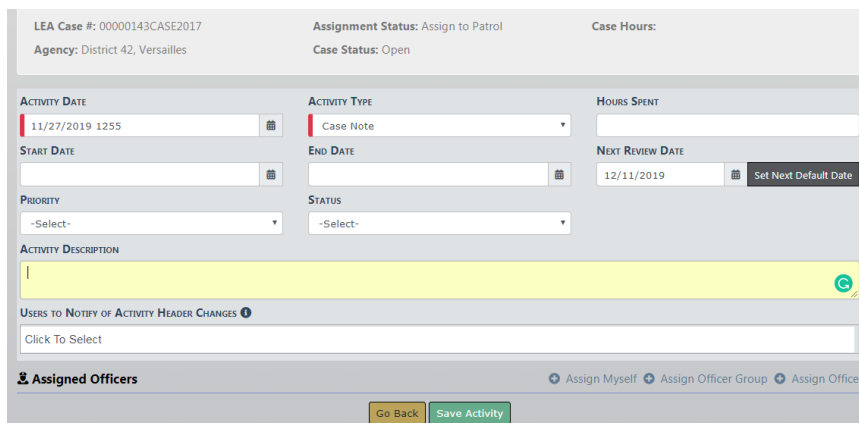
- From the *Case Activities* tab of the *Edit Case* page.
  - Search for and locate the Case, then click on the **Update** icon  in the *Actions* column.



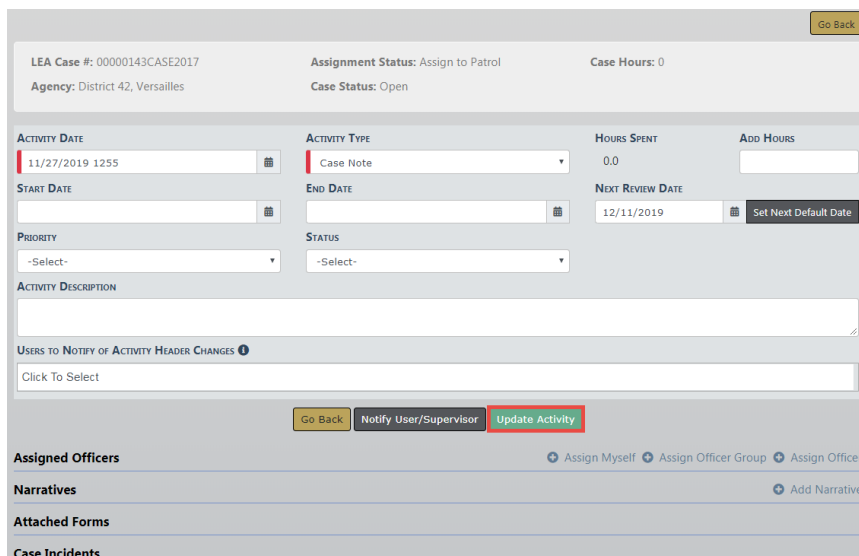
- Click on the *Case Activities* tab of the *Edit Case* page, then click on **Add Case Activity**.



2. The *Add Case Activity* page opens. Enter the necessary information into the fields provided, then click the **Save Activity** button.



3. The page changes from *Add Case Activity* to *Edit Case Activity*, and the **Save Activity** button changes to **Update Activity**.





4. Optionally, make additional changes or page down and add officers, narratives, and other information to the Case Activity.

When adding Officers, you can assign yourself as the officer, add an officer group , or assign one officer by clicking on the respective link.

5. **Custom Field** support allows agencies to capture custom data by adding agency specific data elements, such as text fields, list of values, checkboxes, etc. The **Custom Field** feature must be enabled for it to be available.

For more information on adding information to the Case Activity, refer to "Update Case Activity" below.

## Update Case Activity

You can update a Case Activity by using one of three methods:

- From the **Case Activity** tab of an existing Case.

For more information on searching and selecting a Case, refer to "Review Cases" on page 403.

- From the **My Case Activities** link under the *Recent Activities* section on your *Home* page. You must be associated with at least one existing Case Activity for the link to appear.

For more information on **My Case Activities**, refer to "Show My Case Activities" on page 417.

- When creating a new Case Activity.

For more information on creating a Case Activity, refer to "Create Case Activity" on page 407.

1. Open the *Edit Case Activity* page of the Case Activity you want to update, using one of the methods mentioned above.

The screenshot displays a case management form with the following fields and sections:

- Case Information:** LEA Case #: 00000143CASE2017, Agency: District 42, Versailles, Assignment Status: Assign to Patrol, Case Status: Open, Case Hours: 0.
- Activity Fields:**
  - ACTIVITY DATE: 11/27/2019 1255
  - ACTIVITY TYPE: Case Note
  - HOURS SPENT: 0.0
  - ADD HOURS: [Input field]
  - START DATE: [Input field]
  - END DATE: [Input field]
  - NEXT REVIEW DATE: 12/11/2019
  - Set Next Default Date: [Button]
  - PRIORITY: -Select-
  - STATUS: -Select-
  - ACTIVITY DESCRIPTION: [Text area]
  - USERS TO NOTIFY OF ACTIVITY HEADER CHANGES: [Text area]
- Buttons:** Go Back, Notify User/Supervisor, Update Activity (highlighted in red).
- Assigned Officers:** Assign Myself, Assign Officer Group, Assign Officer.
- Narratives:** Add Narrative.
- Attached Forms**
- Case Incidents**

Make the necessary changes to the top section then click the **Update Activity** button to save.

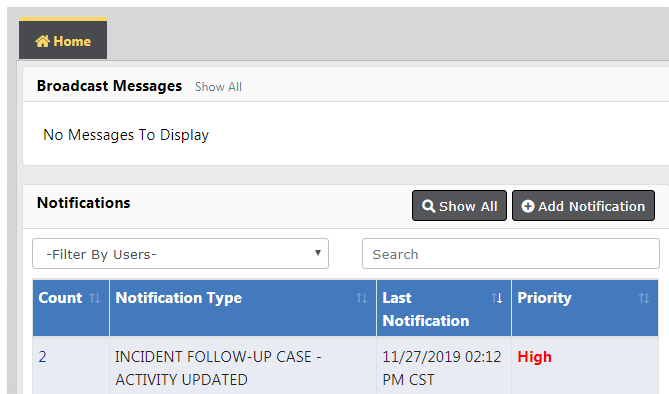
- To notify specific users of the case update, click the **Notify User/Supervisor** button to open the *Notify User/Supervisor* form.

The screenshot shows the 'Notify User/Supervisor' form with the following details:

- USERS:** A list box containing 'Saur, Christine'.
- COMMENT:** A text area containing 'Setting up a test case.'
- Buttons:** Cancel, Send.

Select one or more **Users** to notify and type a **Comment**.

Click **Send** to send a Notification message to the selected users informing them of the case update. The notification appears on the users home page under Notifications.



**Notifications** [Show All](#) [Add Notification](#)

-Filter By Users- Search

Count	Notification Type	Last Notification	Priority
2	INCIDENT FOLLOW-UP CASE - ACTIVITY UPDATED	11/27/2019 02:12 PM CST	High

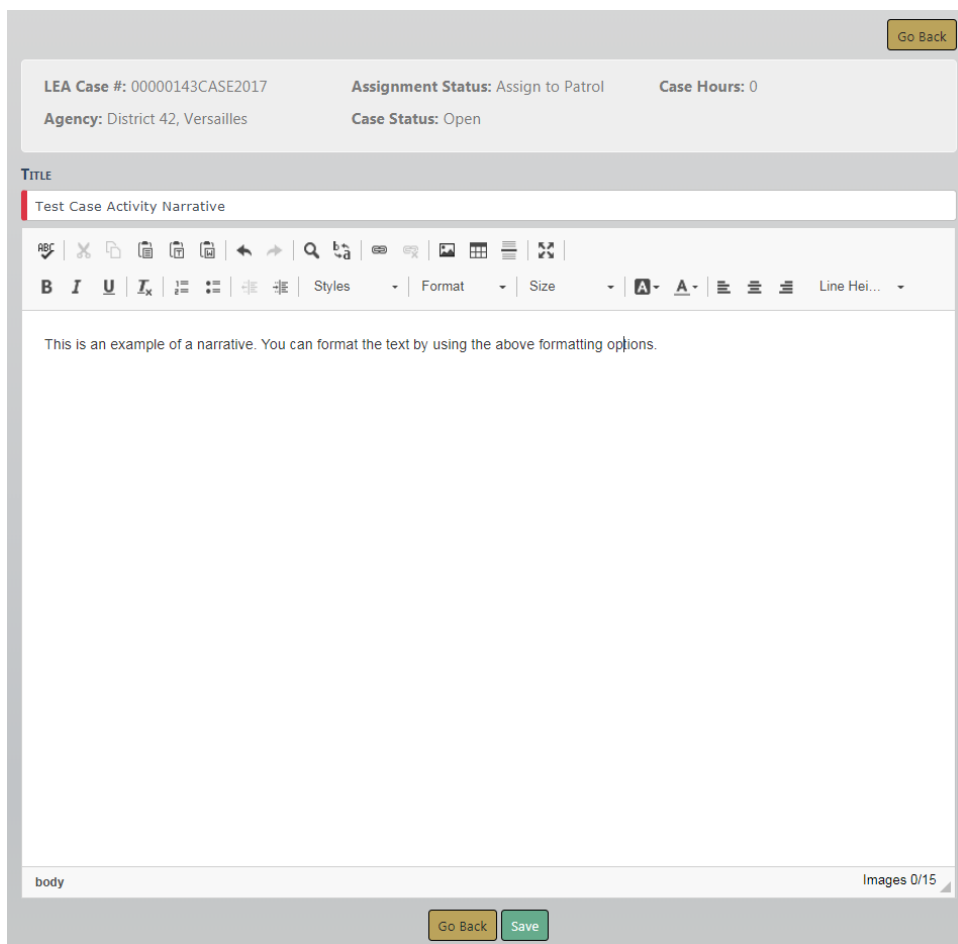
For more information on notifications, refer to "Notifications" on page 21.

3. In the Officer section, optionally click the **Assign Myself** link to add yourself as the officer, click on the **Assign Officer Group** link to assign two or more officers, or click on the **Assign Officer** link to add one officer.
4. Optionally, click the **Add Narrative** link to add a Narrative.



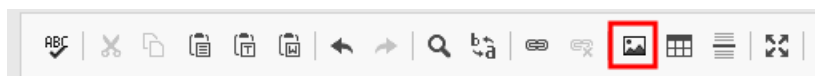
**Narratives** [Add Narrative](#)

Give the Narrative a **Title** and enter your comments using the available format options. The system auto-saves the Narrative every sixty seconds in the event the connection is lost or the computer becomes unusable.



You can use the formatting icons to customize the layout of your narrative. The built-in *Spelling and Grammar Checker* identifies mistakes and corrects them as you type.

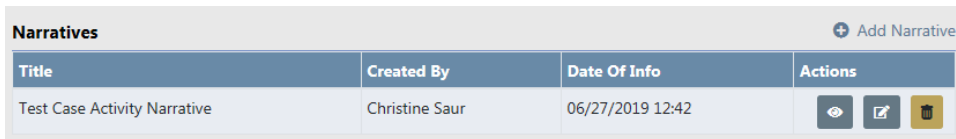
You can *insert an image* by clicking on the **Image** icon.






**Note:** For more information on Narratives, refer to "Incident Report Section – Narrative Tab" on page 208.

**Note:** You have the ability to reference the Case Activity Narrative on the Incident Narrative using the Quick Reference icon. For more information, refer to "Incident Report Section – Narrative Tab" on page 208.

Click the **Save** button when you are finished, then click **Go Back** to return to the Case Activity.



Narratives				<a href="#">+ Add Narrative</a>
Title	Created By	Date Of Info	Actions	
Test Case Activity Narrative	Christine Saur	06/27/2019 12:42	  	

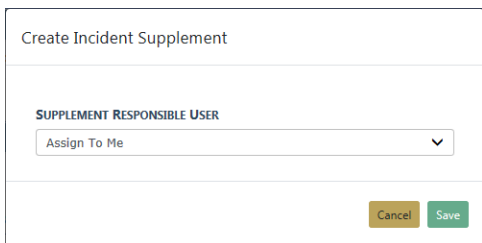
With proper permissions, you can view, edit, or delete the Narrative by clicking on the respective icons in the *Actions* column.

- 5. With proper permissions, you can create a Supplement to a Case Incident that appears in the grid. Click on the **Create Supplement** icon.



Case Incidents					
Report #	Incident Summary	Offenses	Comments	Date Of Info	Actions
2019D4210216	03/04/2019 - 700 North Broadway Street Greenfield, IN			06/18/2019	
2019D4210230	06/18/2019			06/18/2019	

A prompt appears asking you to select the **Supplement Responsible User**.



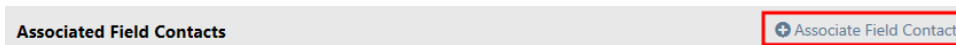
Create Incident Supplement

SUPPLEMENT RESPONSIBLE USER

Assign To Me

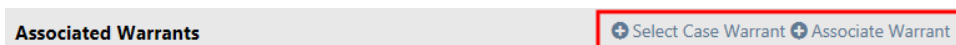
Click into the field then choose an available name from the list, then click **Save** to create the Supplement.

- 6. Optionally, click on the **Associate Field Contact** link to search for and select a Field Contact. For more information on searching and selecting Field Contacts, refer to "Field Contacts" on page 335.



Associated Field Contacts	<a href="#">+ Associate Field Contact</a>
---------------------------	---

- 7. Optionally, associate Warrants to the Case Activity. Click on **Select Case Warrant** to choose a Warrant related to the Case if any, or click on **Associate Warrant** to search for and select a Warrant that is not related to the Case.

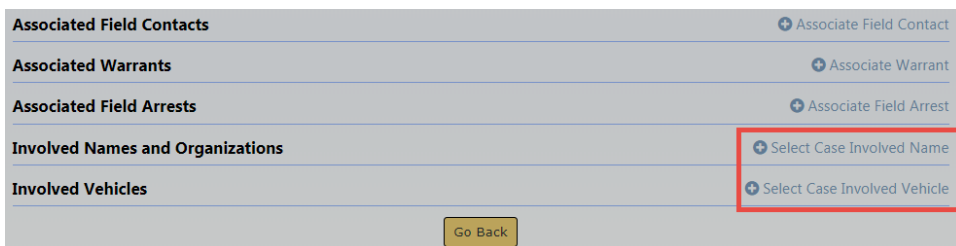


Associated Warrants	<a href="#">+ Select Case Warrant</a>	<a href="#">+ Associate Warrant</a>
---------------------	---------------------------------------	-------------------------------------

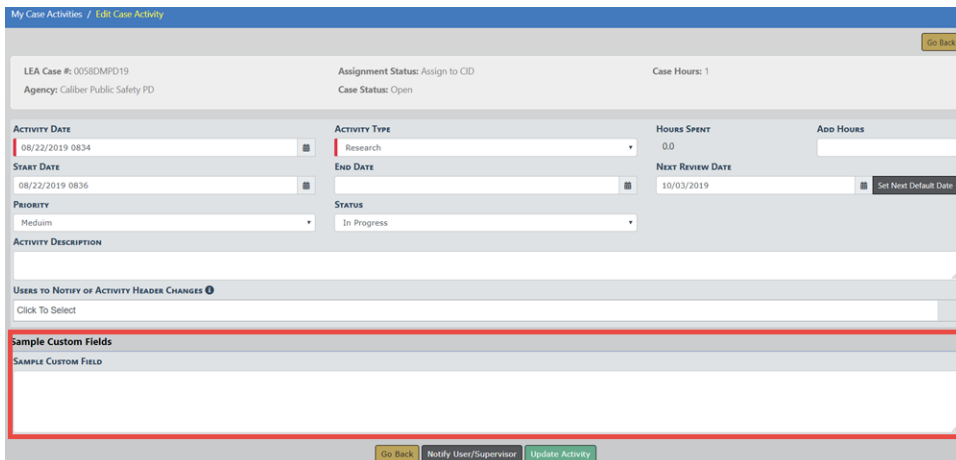
- 8. Optionally, click on the **Associate Field Arrest** to search for and select a Field Arrest. For more information on searching and selecting Field Arrests, refer to "Field Arrest" on page 291.



- 9. People, Vehicles existing on Incidents, Field Contacts, and Field Arrests associated to a Follow-up Investigative Case will appear to relate to a case activity. If People and Vehicles exists, click **Select Case Involved Name** in the Involved Names and Organizations section to relate a name and business. Click **Select Case Involved Vehicle** in the Involved Vehicles section to relate a vehicle.



- 10. **Custom Field** support allows agencies to capture custom data by adding agency specific data elements, such as text fields, list of values, checkboxes, etc. The **Custom Field** feature must be enabled for it to be available. If your agency is using Custom Fields and is configured for Case Activity, the custom fields appear at the bottom of the form.



- 11. When finished updating the Case Activity, click **Go Back** to return to the previous screen.

# Case Load

Use the following procedure to view case loads for your assigned users.

1. Select the **Case Load** option from the *Case Management* submenu or click the **Case Load** link on the *Incidents* page to open the **Case Load** page.

The screenshot shows the 'Case Load' page with search filters and a table of officer case loads.

Officer	Title	Agency	Date Last Assigned	Open Assignments	Actions
Christine Saur - #SAUR111		District 42, Versailles	11/26/2019 04:12 PM CST	3	
Greg QA Wright - #9696	SERGEANT-CAPTAIN-WIN	District 42, Versailles	11/26/2019 04:15 PM CST	53	
Jeff Hanover - #96965	Officer Supervisor	District 42, Versailles	09/23/2013 10:11 PM CST	1	
ODL User - #123456		District 42, Versailles	08/29/2019 11:56 AM CST	0	

2. Filter the listings on this page using the **My Agency** or **My Organization** radio button that appear in the upper left corner.
3. If needed, type text in the **Search** text box to further limit your search to cases containing that specific text string. You can also select from the **Search By** drop-down box.
4. Click the **Search** button to display just those cases or click **Reset** to clear the criteria.
5. Click the view icon under the *Actions* column on a particular officer in the grid to view that officer's cases.

The screenshot shows the 'View Officer Cases' page for Christine Saur, displaying a detailed table of cases.

LEA Case #	Incident Summary	Assigned Date	Role	Update Due	Case Status	Assignment Status	Case Agency
2017D4210140	<b>Report #:</b> 2017D4210140 <b>Report Date:</b> 12/18/2017 <b>Offense(s):</b> 35-43-2-1 B01-BURGLARY-AIRPORT,35-43-2-1 B05-BURGLARY-BAKERY <b>Location:</b> 500 South Main Street Point Marion, IN	03/06/2019 04:05 PM CST	Assisting Officer	04/17/2019	Open	Assign to Patrol	District 42, Versailles
00000162CASE2019	<b>Report #:</b> 2019D4210232 <b>Report Date:</b> 11/26/2019 <b>Offense(s):</b> 14-23-7.5-NATURAL RESOURCE- OPEN BURNING IN EMERGENCY FIRE HAZARD AREA	11/26/2019 04:12 PM CST	Lead Investigator	12/17/2019	Open	Assign to Patrol	District 42, Versailles
00000143CASE2017	<b>Report #:</b> 17-HCSD-0554 <b>Report Date:</b> 09/01/2017 <b>Location:</b> 810 North Broadway Street Greenfield, IN	09/05/2017 08:48 AM CST	Lead Investigator	09/26/2017	Open	Assign to Patrol	District 42, Versailles

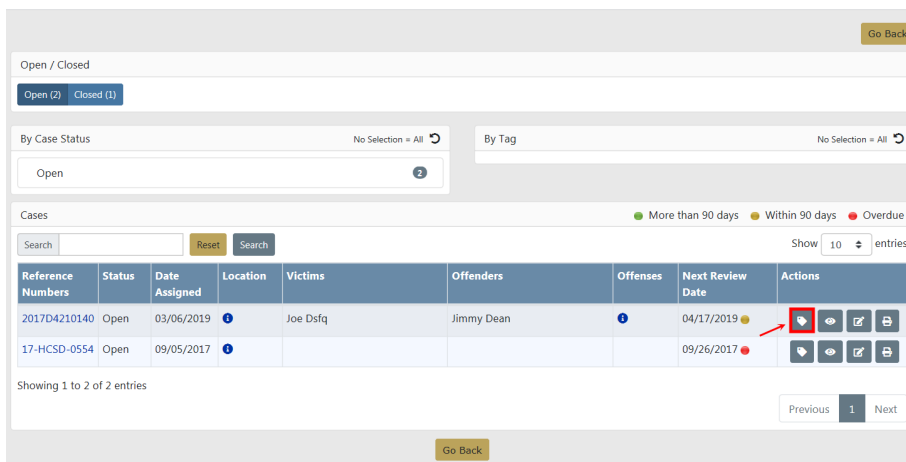
For convenience, the **Offenses** are listed under the *Incident Summary* column.

- 6. If an **MT** link exists in the *Actions* column, click it to display a monthly total for that user.

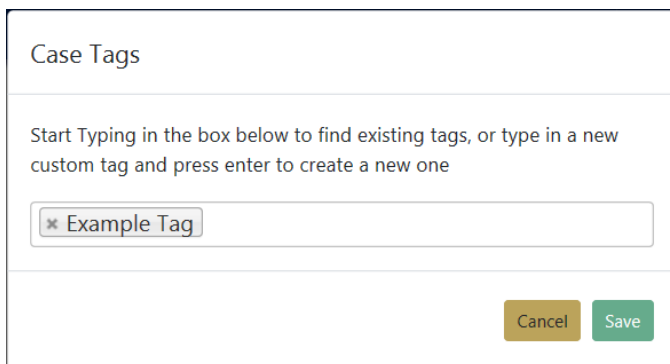
## Investigative Case Tags

In *My Active Cases*, you can **Tag** cases with keywords you choose. This allows investigators to increase efficiency by creating their own tags to group cases based on similar actions, suspects, or other information. For more information on accessing *My Active Cases*, refer to "Navigating Throughout the Case" on page 401.

Click on a **Tag** icon .



In the *Case Tags* window, start typing in the box to find existing tags, or type a new custom tag and press enter to create a new tag. Add one or more tags.



Click **Save** to create the tag and return to *My Cases*.

View case counts by *Case Tag*.



The screenshot shows the 'My Cases' interface. At the top, there are filters for 'Open / Closed' (Open: 3, Closed: 1), 'By Case Status' (Open: 3), and 'By Tag' (Example Tag: 1). Below these are filters for case duration: 'More than 90 days', 'Within 90 days', and 'Overdue'. A search bar and 'Reset' button are also present. The main table lists three cases:

Reference Numbers	Status	Date Assigned	Location	Victims	Offenders	Offenses	Next Review Date	Actions
17-HCSD-0554	Open	09/05/2017	810 North Broadway Street Greenfield, IN				09/26/2017 (Overdue)	[Icons]
2017D4210140	Open	03/06/2019	500 South Main Street Point Marion, IN	Joe Dstq	Jimmy Dean	1	04/17/2019 (Overdue)	[Icons]
2019D4210232	Open	11/26/2019			Robin Poharocyk	1	12/17/2019 (Within 90 days)	[Icons]

Showing 1 to 3 of 3 entries. Navigation: Previous 1 Next

## Show My Case Activities

You have the ability to view a list of your active and completed Case Activities.

1. From your *Home* page, click on the **My Case Activities** link under *Recent Activities*.

The screenshot shows the 'Recent Activities' sidebar menu. The items and their counts are:

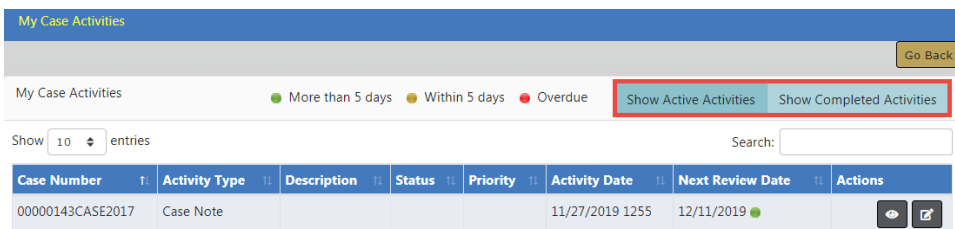
- Initial Report (23)
- Pending Approval (4)
- My Cases (Active Count) (2)
- My Case Activities (Active Count) (1)**
- Evidence Review (8)
- Open Field Arrests (6)
- Arrests Pending Release (11)
- Forms For Review (2)
- Pending UCR Review (6)
- Incidents For Review (4)
- My Court Papers (1)

**Note:** You must have at least one Case Activity for this link to appear.

Color coding provides awareness to assigned users of upcoming and overdue active case activities.

- A red circle indicates one or more case activities are overdue.
- A yellow circle indicates one or more case activities are coming due within 90 days.

2. The *My Case Activities* page appears. Click on the **Show Active Activities** or **Show Completed Activities** button to toggle between the two lists. Whichever button you select, the corresponding list appears below the buttons.



The *Next Review Date* column uses color indicators that quickly identifies cases with upcoming review dates, or have surpassed the next review date.



Activity Date	Next Review Date
11/27/2019 1255	12/11/2019 <span style="color: green;">●</span>

3. With appropriate permissions, you can view or edit your Case Activities. Click on the view or edit icon that appears in the *Actions* column, respectively.



**Note:** You can edit the Case Activity even when the status is set to Complete.

For more information on updating the Case Activity, refer to [UpdateCaseActivity.htm](#).

# Chapter 22. Evidence Module

## Evidence Module Overview

The **Evidence Management Module** captures descriptive information about property that is introduced as Evidence. The Evidence can be associated with incidents, cases, offense, and other system modules. Unlimited multi-media files and documents (evidence receipts, court documents, etc.) can be associated with the Evidence.

The Evidence custodian is responsible for tracking Evidence after an officer has placed it in one of the temporary storage locations. The Evidence custodian typically takes the Evidence from the temporary location and places it in a more permanent location in the agency's Evidence Room. Every action taken with a piece of Evidence can be tracked in the Online RMS **Evidence Module**.

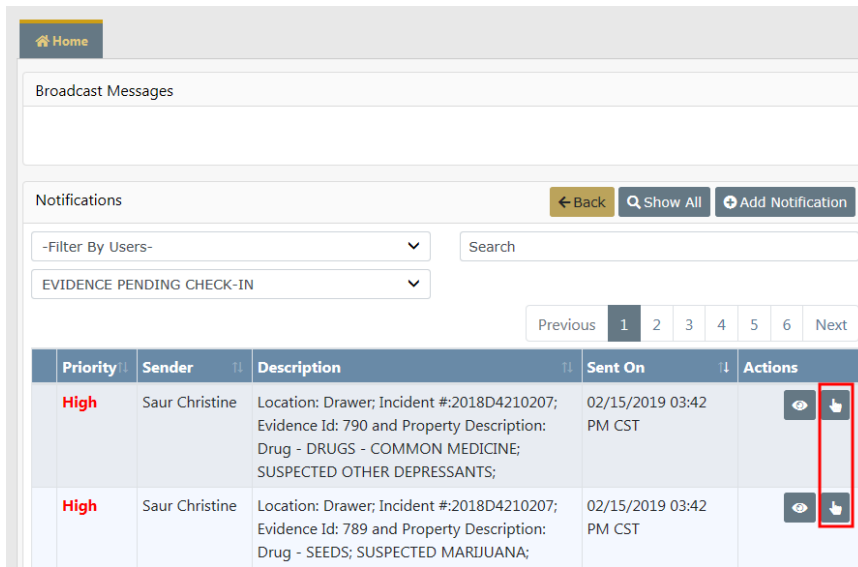
### Other available features:

- A full *Chain of Custody* log is captured and can be searched.
- The system supports bar code reader for easy *check-in* and *checkout*.
- *Mass Checkout* can be performed when there are many pieces of evidence associated with the same incident.
- Evidence *Disposition* and *Disposal* are tracked by the system.

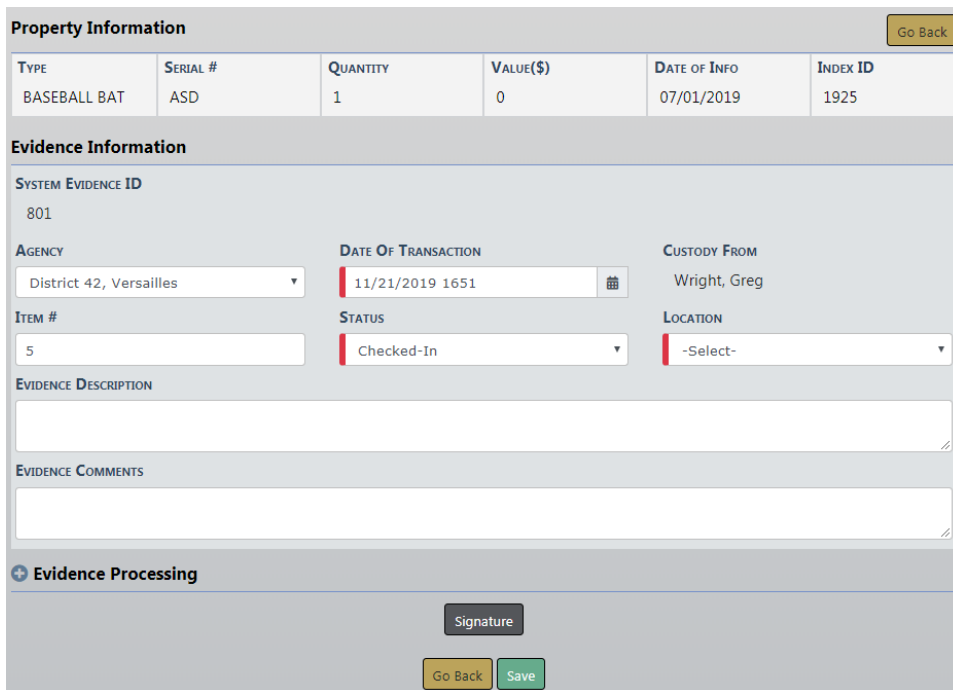
## Check-In From Notification

The first step in taking ownership of a piece of Evidence is to complete a **Check-In**. This can be accomplished by taking *Action* on the system generated **Notification** which is the most common process. The **Check-In** process is also available within the **Evidence Module**. For more information refer to "Check-In" on page 424.

Click on the Select icon  to **Take Action**.



Complete the required fields that display a red boarder to the left of the left, then click the **Save** button.



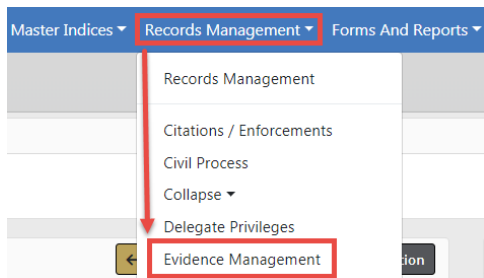
The **Evidence Description** and **Evidence Comments** can be edited by the custodian, and **Evidence Processing** can also be added.

Click the Signature button to sign if needed, or click **Save** to take the action and remove the Notification from the *Home* screen.

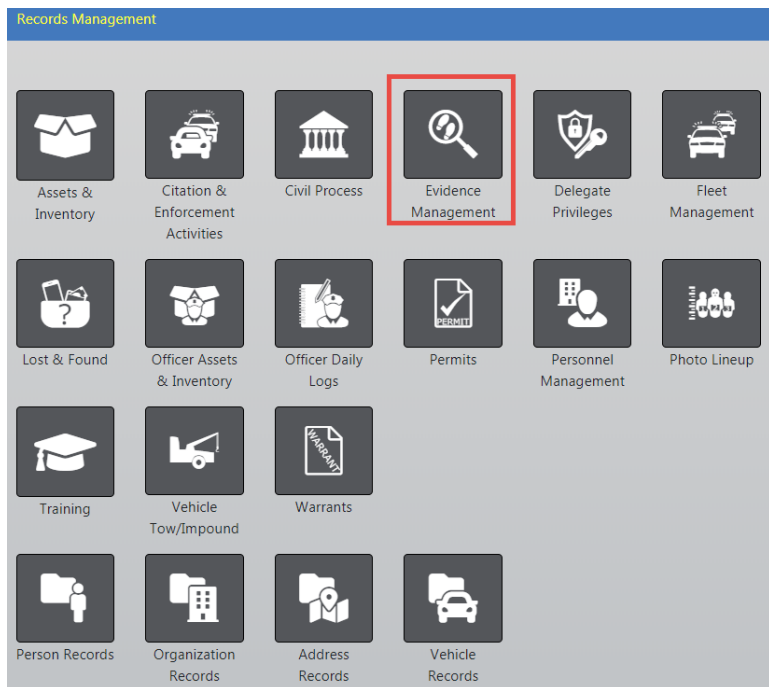
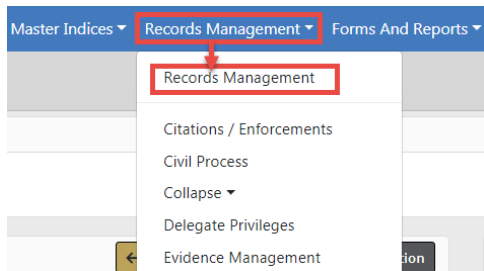
## Evidence Management Access

All functions available to the Evidence Custodian are accessed two ways:

- Hover your mouse over the **Records Management** menu, then click on the **Evidence Management** submenu.

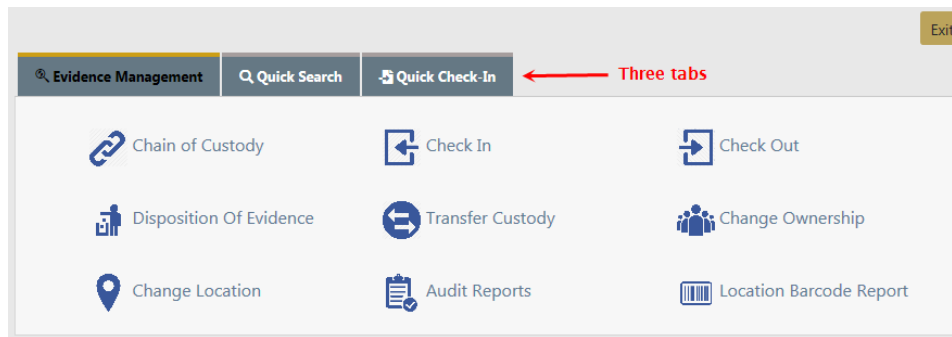


- Click on the **Records Management** menu, then click the **Evidence Management** link.



Either access method takes you to the *Evidence Management* Screen.

## Evidence Management Screen



The *Evidence Management* screen contains three tabs:

- Evidence Management
  - Contains a link to all the Evidence functions. The *Evidence Management* screen defaults to this tab.
- Quick Search
  - Allows you to search Evidence records by **System Evidence ID**, **Incident Report #**, or both. You must fill in at least one.
- Quick Check-In
  - Allows you to **Check In** evidence quickly by using the barcoded **Evidence ID** and **Location Code**.

### ***Evidence Management Tab***

#### **Chain of Custody**

This screen has a wide range of functionality. Evidence Custodian can search for *Evidence* using any of these fields:

**Chain of Custody**

SYSTEM EVIDENCE ID:  INCIDENT REPORT #:  INDEX ID:

SERIAL NUMBER:  ITEM #:

EVIDENCE DESCRIPTION:

**Property Information**

CATEGORY:  All  Property  Drugs  Documents  Currency  Guns

**Additional Information**

AGENCY:  EVIDENCE LOCATION:  DISPOSITION:

CURRENT STATUS:  ACTIVE HOLD:

CHAIN OF CUSTODY FROM:  CHAIN OF CUSTODY TO:  DISPOSED DATE FROM:  DISPOSED DATE TO:

INITIAL EVIDENCE DATE FROM:  INITIAL EVIDENCE DATE TO:  SCHEDULED DISPOSITION DATE FROM:  SCHEDULED DISPOSITION DATE TO:

REVIEW DATE FROM:  REVIEW DATE TO:

PAST DUE DATE:  PAST REVIEW DATE:

**The fields that display below change based on the selected Category**

Enter your search criteria then click the **Search** button to display the *Chain of Custody Search Results* screen.

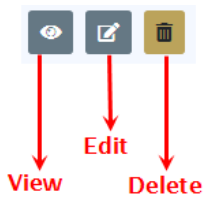
**Chain of Custody** Refine Search New Search Print Evidence Labels Print Chain of Custody

238 result(s) found

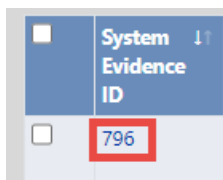
System Evidence ID	Report #	Item #	Offenses	Location	Agency	Scheduled Disposition	Property Information	Status	Actions
<input type="checkbox"/>	786	2018D4210203		Large Item Storage	District 42, Versailles		Property - BEER KEG; Val: 100;	Checked-In	
<input type="checkbox"/>	785	2018D4210203		Large Item Storage	District 42, Versailles		Property - ART OBJECT; Val: 200;	Checked-In	
<input type="checkbox"/>	784	2018-00021	1	Return to Owner	District 42, Versailles		Property - BASEBALL BAT; Make: Rawlings; Ser#: 123; Quantity: 1;	Disposed	
<input type="checkbox"/>	783	2018D4210141	1	Drawer	District 42, Versailles		Property - AMMUNITION; Ser#: 12345; Quantity: 1;	Pending Check-In	
<input checked="" type="checkbox"/>	782	2018D4210190	1	Large Item Storage	District 42, Versailles		Property - AIRCRAFT; Ser#: 123; Quantity: 1;	Checked-In	

Select one or more evidence records to **Print Evidence Labels** or **Print Chain of Custody** for the selected items. Or if you have proper authority, you can **View**, **Edit**, or **Delete** specific Chain of Custody records by clicking on the appropriate icon under the *Actions*

column. If one or more icons are absent then you do not have authority to perform that particular action.



Click on the **System Evidence ID** link to view additional Chain of Custody **Action** items.



A screenshot of the 'Chain Of Custody' details page. At the top, there is an 'Actions' dropdown menu with options: Check Out, Disposition, Change Ownership, Change Location, and Edit Evidence Processing. To the right are buttons for 'Go Back', 'Print Chain of Custody', 'Print Evidence Label', and 'Print Evidence Receipt'. The main content area contains a form with the following information:

- Report Date: 02/19/2014
- Offense(s): USC21-841A-FEDERAL- DRUG DEALING
- Medicine Drug: SUSPECTED HASHISH
- Quantity: 1 Liter
- Evidence Agency: District 42, Versailles
- Item #: 1
- Recovered By: SERGEANT-CAPTAIN-WIN, Wright, Greg, ID# 9696
- Recovered Date: 06/25/2019 1450
- Recovered Location: Other
- Current Status: Checked-in
- Current Status Date: 06/25/2019 1503
- Current Location: Other
- Release/Destruction Order Date: (empty)
- Schedule Disposal Date: (empty)
- Review Date: 09/28/2019

Below the form is a 'Chain Of Custody' table with a 'Show 10 entries' dropdown. The table has the following columns: Purpose, Custody From, Custody To, Custody Date, Storage Location, Due Date, Description, Comments, and Signature.

Purpose	Custody From	Custody To	Custody Date	Storage Location	Due Date	Description	Comments	Signature
CHECK-IN	SERGEANT-CAPTAIN-WIN, Wright, Greg, ID# 9696	SERGEANT-CAPTAIN-WIN, Wright, Greg, ID# 9696	06/25/2019 1503	Other				
PENDING CHECK-IN	SERGEANT-CAPTAIN-WIN, Wright, Greg, ID# 9696		06/25/2019 1455	Drawer				

### Check-In

The **Check-In** link allows the user to search for Evidence to **Check-In**. The *Evidence Search - Check In* screen defaults to search on Evidence *Pending Check-In*, but you can also search on Evidence which has been **Checked-Out** for purposes of checking it back in to your custody.



Enter your search criteria then click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search Evidence records by scanning the barcode.

The *Check In Search Results* screen appears.

System Evidence ID	Report #	Item #	Offenses	Location	Agency	Scheduled Disposition	Property Information	Status	Actions	
<input checked="" type="checkbox"/>	783	2018D4210141	1	Drawer	District 42, Versailles		Property - AMMUNITION; Ser#: 12345; Quantity: 1;	Pending Check-In		
<input type="checkbox"/>	781	17-MPD-0059	1	Drawer	District 42, Versailles		Property - AIRCRAFT; Quantity: 1;	Pending Check-In		

Select the Evidence you want to Check In then click **Continue** to display the *Check In* screen.

System Evidence ID	Agency	Property Information	Custody From	Location	Evidence Description	Actions
783	District 42, Versailles	Type: AMMUNITION Serial #: 12345 Value(\$): 0	SERGEANT-CAPTAIN-WIN, Wright, Greg, ID# 9696	--Select--		

AGENCY: District 42, Versailles

CUSTODY DATE / TIME: 03/14/2019 1107

CHECKED IN BY: Saur, Christine, ID# SAUR111

CHECK IN COMMENT:

Choose the **Location** from the drop-down list.

If you wish, you can also add additional Evidence items to the **Check In** list by clicking on the **Add Evidence** button on the top right of the screen. The **Add Evidence** button

takes you back to the *Evidence Search - Check In* screen. Follow the same process as above to search and select the Evidence you want to add then click **Continue**. The additional Evidence is then added to the **Check In** list.

Make other changes if needed, then click the **Signature** button to sign if necessary.

Click **Save** to save your changes and remain on the page to print evidence receipts, labels, or chain of custody. Click **Save & Exit** to save your changes and exit the page.

**NOTE:** If you are in a *Multi-tier Organization*, the **Status** will default to *Pending Check-In*. Changing it to *Check-In* changes the **Location** to the previously checked in location, if it exists.

**NOTE:** If you are not in a *Multi-tier Organization*, the **Status** will default to *Check-In* and the **Location** will default to the previously checked in location, if it exists.

**NOTE:** An *Evidence Custodian* taking action on an *Evidence Pending Check-In* notification will default the **Location** to the previously checked in location, if the **Status** is set to *Check-In*.

### Check-Out

The **Check-Out** link will allow the user to search for Evidence to **Check-Out**. The **Status** of the Evidence must be *Checked-In* to take this action. Once the item is located and selected, the user can document the person it is being checked out to and the destination.

The screenshot shows the 'Check Out' form with the following fields and annotations:

- Barcode Search**: A button in the top right corner, highlighted with a red box and an arrow pointing to it with the text "Click to search by scanning a barcode".
- SEARCH CRITERIA**: Fields for SYSTEM EVIDENCE ID, INCIDENT REPORT #, INDEX ID, SERIAL NUMBER, and ITEM #.
- EVIDENCE DESCRIPTION**: A large text input field.
- CATEGORY**: Radio buttons for ALL (selected), PROPERTY, DRUGS, DOCUMENTS, CURRENCY, and GUNS. An arrow points to this section with the text "Choose a Category then enter search criteria".
- AGENCY**: A dropdown menu with "District 42, Versailles" selected.
- EVIDENCE LOCATION**: A dropdown menu with "-Select-" selected.
- CURRENT STATUS**: A dropdown menu with "Checked-In" selected.
- ACTIVE HOLD**: A dropdown menu with "-Select-" selected.
- Buttons**: "Go Back", "Reset", and "Search" buttons at the bottom.

Enter your search criteria then click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search Evidence records by scanning the barcode.

The *Check Out Search Results* screen appears.

System Evidence ID	Report #	Item #	Offenses	Location	Agency	Scheduled Disposition	Property Information	Status	Actions
<input type="checkbox"/>	2018D4210203			Large Item Storage	District 42, Versailles		Property - BEER KEG; Val: 100;	Checked-In	
<input checked="" type="checkbox"/>	2018D4210203			Large Item Storage	District 42, Versailles		Property - ART OBJECT; Val: 200;	Checked-In	

Select the Evidence you want to Check Out then click **Continue** to display the *Check Out* screen. Select multiple items to check out more than one.

Choose the **Destination** from the drop-down list, enter **Check Out To** and other necessary data.

If you wish, you can also add additional Evidence items to the **Check Out** list by clicking on the **Add Evidence** button on the top right of the screen. The **Add Evidence** button takes you back to the *Evidence Search - Check Out* screen. Follow the same process as above to search and select the Evidence you want to add then click **Continue**. The additional Evidence is then added to the **Check Out** list.

Click the **Signature** button to sign if necessary.

Click **Save** to save your changes and remain on the page to print evidence receipts, labels, lab report, or chain of custody. OR click **Save & Exit** to save your changes and exit the page.

### Disposition of Evidence

Evidence Custodians will use this feature to search for Evidence requiring disposal from your evidence room. The **Status** of the Evidence must be *Checked-In* to take this action.

A **Disposition** is done when Evidence is released to its owner or other person, auctioned, destroyed, or given to another agency.

Click on the **Disposition of Evidence** link on the **Evidence Management** tab to display the *Evidence Search* screen.

Select a **Category**, then enter your search criteria then click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search Evidence records by scanning the barcode.

System Evidence ID	Report #	Item #	Offenses	Location	Agency	Scheduled Disposition	Property Information	Status	Actions
<input type="checkbox"/> 786	2018D4210203			Large Item Storage	District 42, Versailles		Property - BEER KEG; Val: 100;	Checked-In	
<input checked="" type="checkbox"/> 785	2018D4210203			Large Item Storage	District 42, Versailles		Property - ART OBJECT; Val: 200;	Checked-In	

Select the Evidence records then click **Continue** to display the *Disposition* screen. Select multiple items to process more than one.

System Evidence ID	Agency	Property Information	Disposition	Evidence Description	Actions
782	District 42, Versailles	Type: AIRCRAFT Serial #: 123 Value(\$): 0	-Select-		

DISPOSED BY: Saur, Christine, ID# SAUR111

DISPOSITION DATE / TIME: 03/14/2019 11:14

DISPOSITION COMMENT:

Buttons: Signature, Go Back, Save, Save & Exit

**NOTE:** The **Disposition Date** defaults to the current date. You can change the **Disposition Date**; however, a warning message appears if the date is prior to the check in date.

Any field with a red left-hand border is a required field. You must complete required fields to continue.

If you wish, you can also add additional Evidence items to the **Disposition** list by clicking on the **Add Evidence** button on the top right of the screen.

Click the **Signature** button to sign if needed.

Click the **Save** button to update and **Print Chain of Custody**, **Print Evidence Labels**, or **Print Evidence Receipt**. Or click the **Save & Exit** button to apply your changes and exit without print options.

### Transfer Custody

The **Transfer Custody** link is used when a piece of Evidence which is **Checked-Out** transfers possession to another officer. For example, if the original officer taking Evidence to court gets sick and hands the Evidence to another officer. The Evidence custodian can show that **Transfer of Custody** within the Online RMS **Evidence Module**.

Click on the **Transfer Custody** link to display the *Evidence Search - Transfer Custody* screen.

Enter your search criteria then click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search Evidence records by scanning the barcode.

The *Transfer Custody Search Results* screen appears.

System Evidence ID	Report #	Item #	Offenses	Location	Agency	Scheduled Disposition	Property Information	Status	Actions
<input type="checkbox"/> 779	2017D4210140	1		Court	District 42, Versailles		Property - ART OBJECT; Ser#: ASDP; Quantity: 1; Val: 300;	Checked-Out	
<input checked="" type="checkbox"/> 778	2017D4210140			Officer	District 42, Versailles	10/31/2019	Drug - SEEDS; SUSPECTED BARBITURATES; Quantity: 2; Value: ;	Checked-Out	

Select the Evidence you want to transfer then click **Continue** to display the *Transfer* screen. Select multiple items to transfer more than one.

Enter the **Custody To**, choose the **Destination** from the drop-down list, and enter other necessary data.

Click the **Signature** button to sign if necessary.

Click **Save** to save your changes and remain on the page or click **Save & Exit** to save your changes and exit the page.

### Change Ownership

This link will be used to transfer Evidence from one Caliber Public Safety agency in a work group to another. The **Status** of the Evidence must be *Checked-In* to take this action.

Click on the **Change Ownership** link to display the *Evidence Search - Change Ownership* screen.

**Change Ownership** Barcode Search

SYSTEM EVIDENCE ID:  INCIDENT REPORT #:  INDEX ID:

SERIAL NUMBER:  ITEM #:

EVIDENCE DESCRIPTION:

CATEGORY:  ALL  PROPERTY  DRUGS  DOCUMENTS  CURRENCY  GUNS

AGENCY:  EVIDENCE LOCATION:

CURRENT STATUS:  ACTIVE HOLD:

Enter your search criteria then click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search Evidence records by scanning the barcode.

The *Change of Ownership Search Results* screen appears.

**Change Ownership** Refine Search New Search Continue

7 result(s) found Select items using the check boxes and select 'Continue'

System Evidence ID	Report #	Item #	Offenses	Location	Agency	Scheduled Disposition	Property Information	Status	Actions
<input type="checkbox"/> 786	2018D4210203			Large Item Storage	District 42, Versailles		Property - BEER KEG; Val: 100;	Checked-In	<input type="button" value="View"/> <input type="button" value="Print"/>
<input checked="" type="checkbox"/> 782	2018D4210190	1		Large Item Storage	District 42, Versailles		Property - AIRCRAFT; Ser#: 123; Quantity: 1;	Checked-In	<input type="button" value="View"/> <input type="button" value="Print"/>

Check the box to select all entries Select individual entries

Select the Evidence records then click **Continue** to display the *Transfer* screen. Select multiple items if you want to change ownership on more than one.

System Evidence ID	Agency	Property Information	Ownership To	Evidence Description	Actions
782	District 42, Versailles	Type: AIRCRAFT Serial #: 123 Value(\$): 0	District 42, Versailles		

CHANGE OWNERSHIP DATE / TIME: 03/14/2019 11:54

CHANGED BY: Saur, Christine, ID# SAUR111

CHANGE OF OWNERSHIP COMMENT

Buttons: Signature, Go Back, Save, Save & Exit

Enter the **Comments**, choose the **Ownership To** from the drop-down list if different than what displays, and modify other necessary data.

Click the **Signature** button to sign if necessary.

Click **Save** to save your changes and remain on the page to print evidence receipts, labels, or chain of custody. Click **Save & Exit** to save your changes and exit the page.

### Change Evidence Location

The Evidence Custodian can use this link to show Evidence movement from one place to another. The **Status** of the Evidence must be *Checked-In* to take this action. An example would be moving Evidence from one shelf to another within the Evidence room. Another example would be consolidating Evidence in temporary lockers to make lockers accessible for more Evidence.

Click on the **Change Location** link on the **Evidence Management** tab to display the *Evidence Search - Change Location* screen.

Change Location Barcode Search

SYSTEM EVIDENCE ID:

INCIDENT REPORT #:

INDEX ID:

SERIAL NUMBER:

ITEM #:

EVIDENCE DESCRIPTION:

CATEGORY:  ALL  PROPERTY  DRUGS  DOCUMENTS  CURRENCY  GUNS

AGENCY:

EVIDENCE LOCATION:

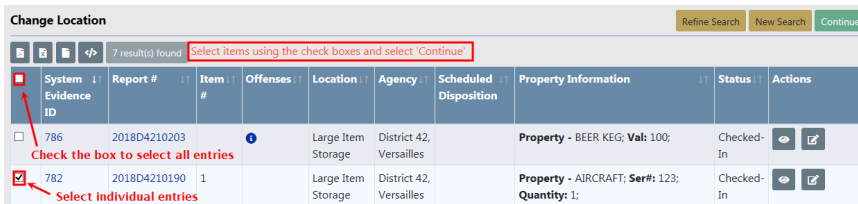
CURRENT STATUS:


ACTIVE HOLD:

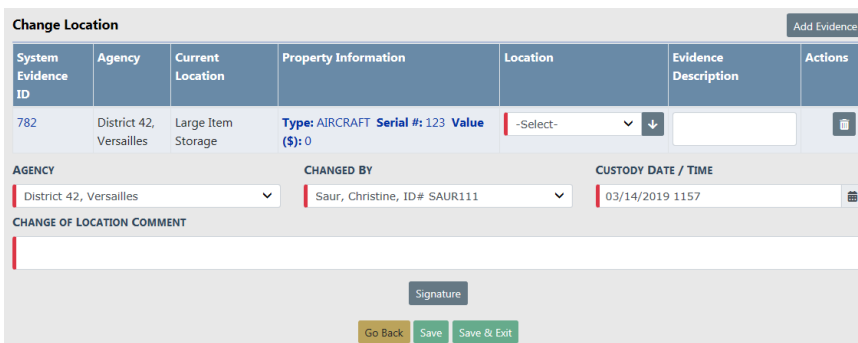
Buttons: Go Back, Reset, Search



Enter your search criteria then click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search Evidence records by scanning the barcode.



Select the Evidence records then click **Continue**, or click on the edit icon  to display the *Change Location* screen. Select multiple items to process more than one.



**Changed By** defaults to the logged in user. Enter comments, choose the **Location** from the drop-down list, and enter or change other necessary data.

If you wish, you can also add additional Evidence items to the **Change Location** list by clicking on the **Add Evidence** button on the top right of the screen. The **Add Evidence** button takes you back to the *Evidence Search - Change Location* screen. Follow the same process as above to search and select the Evidence you want to add then click **Continue**. The additional Evidence is then added to the **Change Location** list.

Click the **Signature** button to sign if necessary

Click **Save** to save your changes and remain on the page to print evidence receipts, labels, or chain of custody. Click **Save & Exit** to save your changes and exit the page.

### Evidence Audit Reports

**Evidence Audit Reports** allows Evidence custodians to perform self-audits of their agency's Evidence Vault. Perform audits at any time.

Click on **Audit Reports** from the **Evidence Management** home window to display the available reports.

Go Back

Generated Audits Location Discrepancy Audits ← Two tabs

Show 10 entries Search: Add Audit Report

Report #	Audit By	Audit Date	Finalized Date	Actions
00000201811	Simpson, Homer	11/01/2018 1153	11/01/2018 1208	👁️ 📄 🗑️
00000151710	Simpson, Homer	10/16/2017 1418		👁️ 📄 🗑️
00000101708	Saur, Christine - ID# SAUR111	08/17/2017 1528		👁️ 📄 🗑️
00000091706	Simpson, Homer	06/27/2017 1316		👁️ 📄 🗑️
00000071705	Simpson, Homer	05/11/2017 1040		👁️ 📄 🗑️
00000061703	Simpson, Homer	03/14/2017 1717		👁️ 📄 🗑️
00000051703	Friday, Joe	03/14/2017 1712		👁️ 📄 🗑️
00000041703	Friday, Joe	03/14/2017 1711		👁️ 📄 🗑️
1604006	Simpson, Homer	04/27/2016 0929		👁️ 📄 🗑️
1511005	Friday, Joe	11/17/2015 1318		👁️ 📄 🗑️

Showing 1 to 10 of 13 entries Previous 1 2 Next

There are two tabs to the the Evidence Audit Reports screen:

- Generated Audits
- Location Discrepancy Audits

### Search Audit Reports

On either tab you have the ability to search for specific reports.

Click in the **Search** field and enter all or a portion of the **data** into the search text box that pertains to the search criteria. The results that match your criteria and entered data display in the grid.

Go Back

Generated Audits Location Discrepancy Audits

Show 10 entries Search: 1511 x Add Audit Report

Report #	Audit By	Audit Date	Finalized Date	Actions
1511005	Friday, Joe	11/17/2015 1318		👁️ 📄 🗑️
1511004	Friday, Joe	11/17/2015 1313		👁️ 📄 🗑️
1511003	Simpson, Homer	11/17/2015 1200		👁️ 📄 🗑️
1511002	Simpson, Homer	11/17/2015 1152		👁️ 📄 🗑️

Showing 1 to 4 of 4 entries (filtered from 13 total entries) Previous 1 Next

### Create a New Audit Report

You have the ability to generate a new **Audit Report**.

Click the **Add New Audit Report** link on the *Generated Audits* tab to open the *Evidence Search* form.

# OF RECORDS TO AUDIT

SYSTEM EVIDENCE ID      INCIDENT REPORT #      INDEX ID

SERIAL NUMBER      ITEM #

EVIDENCE DESCRIPTION

CATEGORY

ALL   PROPERTY   DRUGS   DOCUMENTS   CURRENCY   GUNS

AGENCY      EVIDENCE LOCATION

District 42, Versailles      -Select-

CURRENT STATUS      ACTIVE HOLD

Checked-In      -Select-

Go Back   Reset   Generate Audit Report

Enter the # of Records to Audit and other applicable fields then click **Generate Audit Report** to display the **Evidence Audit Report**.

Generated Audit Details

AUDIT BY      AUDIT DATE      # OF RECORDS

Saur, Christine      02/08/2019 1557      5

AUDIT COMMENTS

Save Audit      To correct the Location, uncheck the select box and on the right, select the correct Location

Confirmed / Unconfirmed Evidence Items

Evidence ID	Property Description	Incident Report	Status	Location	Comments / Confirm Location
<input checked="" type="checkbox"/>	786      Property - BEER KEG; Val: 100;	2018D4210203 3192	Checked-In	Large Item Storage	
<input checked="" type="checkbox"/>	782      Property - AIRCRAFT; Ser#: 123; Quantity: 1;	2018D4210190 3178	Checked-In	Large Item Storage	
<input checked="" type="checkbox"/>	770      Property - BADGE; Ser#: 234234; Quantity: 1; Val: 40;		Checked-In	Large Item Storage	
<input type="checkbox"/>	759      GUN - HANDGUN; Primary Color: Beige; Ser#: 123; Quantity: 1; Value: 20;	2017D4210133 2987	Checked-In	Other      Large Item Storage	
<input checked="" type="checkbox"/>	758      Drug - SEEDS; SUSPECTED COCAINE; Quantity: 1 Dosage units; Value: Dosage units;	2017D4210133 2987	Checked-In	Large Item Storage	

If the **Location** is different, uncheck the box to the left, and select the correct **Location** from the list box on the right. Enter any necessary comments.

Click **Save Audit** to save the report, then click **Finalize** to add it to the **Evidence Audit** report list.

Generated Audits      Location Discrepancy Audits

Show 10 entries      Search:      Add Audit Report

Report #	Audit By	Audit Date	Finalized Date	Actions
00000221902	Saur, Christine - ID# SAUR111	02/08/2019 1701	02/08/2019 1701	View      Edit      Delete
00000201811	Simpson, Homer	11/01/2018 1153	11/01/2018 1208	View      Edit      Delete
00000151710	Simpson, Homer	10/16/2017 1418		View      Edit      Delete

Using the icons in the **Action** column you can view, edit or delete reports. If an icon does not appear, then you do not have permissions to perform that action. For

example, if the edit icon does not appear next to a particular report then you cannot edit that report.

Click the **View** icon  to view the **Evidence Audit** and print evidence labels.

Generated Audit Details				Go Back	Print Evidence Labels
AUDIT REPORT #	AUDIT BY	AUDIT DATE	# OF RECORDS		
00000221902	Saur, Christine - ID# SAUR111	02/08/2019 1701	5		
AUDIT COMMENTS					
Confirmed / Unconfirmed Evidence Items					
<input type="checkbox"/>	Confirmed	Evidence ID	Property Description	Location	Comments / Confirm Location
<input type="checkbox"/>	Yes	758	Drug - SEEDS; SUSPECTED COCAINE; Quantity: 1 Dosage units; Value: Dosage units;	Large Item Storage	
<input type="checkbox"/>	No	759	GUN - HANDGUN; Primary Color: Beige; Ser#: 123; Quantity: 1; Value: 20;	Other	/ Large Item Storage
<input type="checkbox"/>	Yes	770	Property - BADGE; Ser#: 234234; Quantity: 1; Val: 40;	Large Item Storage	
<input type="checkbox"/>	Yes	782	Property - AIRCRAFT; Ser#: 123; Quantity: 1;	Large Item Storage	
<input type="checkbox"/>	Yes	786	Property - BEER KEG; Val: 100;	Large Item Storage	

### Create Location Discrepancy Audit Report

You have the ability to create a **Location Discrepancy Audit Report** from the *Location Discrepancy Audits* tab. This report lists all items currently in a particular location.

Generated Audits						Location Discrepancy Audits	Go Back
Incident Report	Audit By	Audit Date	Finalized Date	Actions			
00000211811	Simpson, Homer	11/01/2018 1248	11/01/2018 1249				
00000181711	Saur, Christine - ID# SAUR111	11/20/2017 2035	11/20/2017 2036				
00000161710	Simpson, Homer	10/31/2017 1206	11/01/2018 1243				
00000141709	Simpson, Homer	09/13/2017 1200					
00000131708	Simpson, Homer	08/30/2017 0829	09/13/2017 1204				
00000121708	Saur, Christine - ID# SAUR111	08/17/2017 1616					
00000111708	Saur, Christine - ID# SAUR111	08/17/2017 1616					

Showing 1 to 7 of 7 entries

Previous 1 Next

Click on the **Add Discrepancy Report** button to display the *Location Discrepancy Audit* form.

Location Discrepancy Audit		Go Back
SELECT A LOCATION		
-Select-		
Confirmed / Unconfirmed Evidence Items		
Additional Evidence Items	<input type="text"/>	Add Additional Evidence

Select a location to display the **Location Discrepancy Audit** report.

**Location Discrepancy Audit** Go Back

SELECT A LOCATION  
 Large Item Storage

AUDIT COMMENTS  
 [Text Area]

Save Audit

**Confirmed / Unconfirmed Evidence Items**

<input type="checkbox"/>	Evidence ID	Property Description	Comments
<input type="checkbox"/>	474	Property - STEREO; Primary Color: Black; Secondary Color: Black; Ser#: 9082253; Quantity: 1; Val: 150;	[Text Area]
<input checked="" type="checkbox"/>	753	GUN - OTHER; individ; Make: Individ; Quantity: 1; Value: 800;	[Text Area]
<input type="checkbox"/>	758	Drug - SEEDS; SUSPECTED COCAINE; Quantity: 1 Dosage units; Value: Dosage units;	[Text Area]
<input type="checkbox"/>	770	Property - BADGE; Ser#: 234234; Quantity: 1; Val: 40;	[Text Area]
<input type="checkbox"/>	782	Property - AIRCRAFT; Ser#: 123; Quantity: 1;	[Text Area]
<input type="checkbox"/>	786	Property - BEER KEG; Val: 100;	[Text Area]

**Additional Evidence Items** Add an entry to the list → [Text Input] Add Additional Evidence

Evidence ID	Property Description	Comments	Actions
-------------	----------------------	----------	---------

Select all items to that are *Confirmed*. You can select individual items, or all items at once. If all items are *Confirmed*, click the **Select All** box. To add an item to the list, enter the **Evidence ID** in the **Additional Evidence** field and click **Add**. If the **Evidence ID** entered does not exist, you will receive a message stating it could not be found.

Click the **Save Audit** button, then click **Finalize** to save the report to the **Location Discrepancy Audit Reports** tab.

Generated Audits **Location Discrepancy Audits** Go Back

Show 10 entries Search: [Text Input] Add Discrepancy Report

Incident Report	Audit By	Audit Date	Finalized Date	Actions
00000231902	Saur, Christine - ID# SAUR111	02/08/2019 1715	02/08/2019 1715	[Eye Icon] [Trash Icon]
00000211811	Simpson, Homer	11/01/2018 1248	11/01/2018 1249	[Eye Icon] [Trash Icon]

Using the icons in the *Action* column you can view, edit or delete reports. If an icon does not appear, then you do not have permissions to perform that action. For example, if the edit icon does not appear next to a particular report then you cannot edit that report.

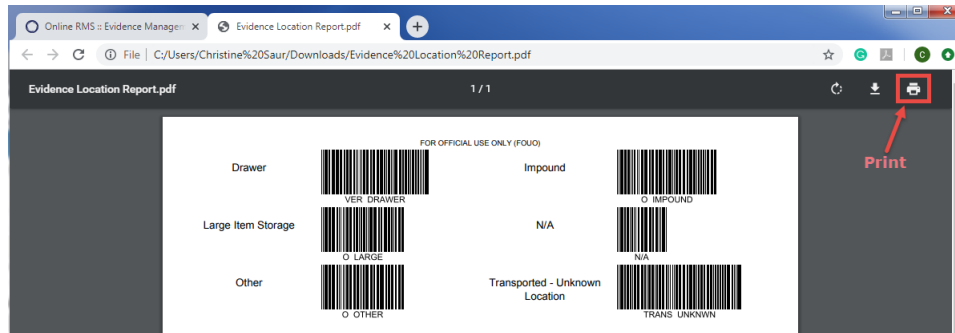
### Location Barcode Report

The Evidence Custodian can use this link to produce a **Location Barcode Report**.

Click on the **Location Barcode Report** link on the **Evidence Management** tab to generate the report.

A PDF file downloads to your machine.

Click on the file to view the report in a new tab.



Click on the **Print** icon to print.

Click the **X** to close the tab.

### Quick Search Tab

This option works the same way as the **Evidence Search**. The process, however, is shortened by using a scanner and bar coding system.

A screenshot of the "Quick Search" tab in the Evidence Management system. The interface features a navigation bar with "Evidence Management", "Quick Search" (highlighted with a red box), and "Quick Check-In" tabs. Below the navigation bar, there are two input fields: "SYSTEM EVIDENCE ID" and "INCIDENT REPORT #". At the bottom of the form are "Reset" and "Search" buttons. An "Exit" button is located in the top right corner.

### Quick Check-In Tab

This option works the same way the **Check-In** link works. The process, however, is shortened by using a scanner and bar coding system.

The screenshot shows a web interface for 'Evidence Management'. At the top, there are three tabs: 'Evidence Management', 'Quick Search', and 'Quick Check-In', with the latter highlighted in red. An 'Exit' button is in the top right corner. Below the tabs are two input fields: 'SYSTEM EVIDENCE ID' and 'LOCATION CODE'. Underneath these fields are 'Reset' and 'Check In' buttons. A grey box contains the following instructions:

- 1) Quick Check-IN will allow the use of barcoded Evidence ID's and Evidence Location Codes.
- 2) Both evidence "Checked-OUT" and evidence "Pending Check-IN" can be handled using the Quick Check-IN method.
- 3) By using the Quick Check-IN method the current date and time will be the defaulted evidence "Custody Date & Time".
- 4) If the Check in Comment or Evidence Description details need to be entered use the standard evidence "Check-IN" screen.



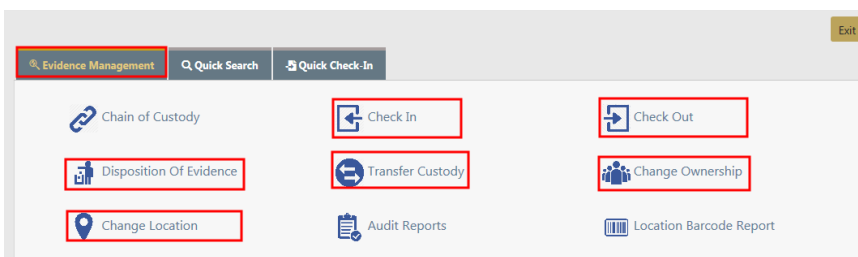


# Chapter 23. Barcode Search Process

## Barcode Search Process Overview

The **Barcode Search** feature allows you to input multiple items into the **Evidence Module** automatically by scanning the barcode label. through the Evidence Management menu.

Access the scanning process through applicable links on the *Evidence Management* menu. For instructions on accessing the *Evidence Management* menu, refer to "Evidence Management Access" on page 421.

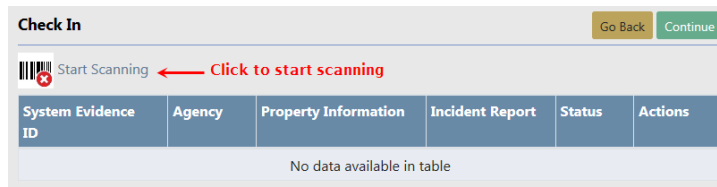


Click on one of the links to open the respective Search screen, then click on the **Barcode Search** button on the top right. While the **Check In** process is used in the example, the same process applies to the other applicable links.

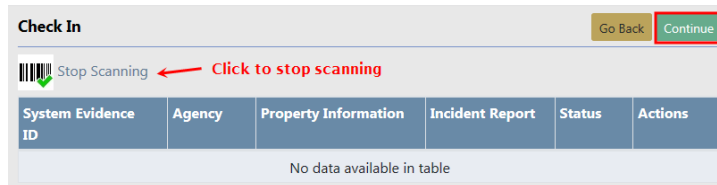
The 'Check In' form includes the following sections and fields:

- Check In** header with a 'Barcode Search' button on the right.
- SYSTEM EVIDENCE ID**, **INCIDENT REPORT #**, and **INDEX ID** input fields.
- SERIAL NUMBER** and **ITEM #** input fields.
- EVIDENCE DESCRIPTION** text area.
- Property Information** section with a **CATEGORY** dropdown menu (options: ALL, PROPERTY, DRUGS, DOCUMENTS, CURRENCY, GUNS).
- Additional Information** section with:
  - AGENCY** dropdown (selected: District 42, Versailles)
  - EVIDENCE LOCATION** dropdown (selected: -Select-)
  - CURRENT STATUS** dropdown (selected: Pending Check-In)
  - ACTIVE HOLD** dropdown (selected: -Select-)
- Buttons at the bottom: **Go Back**, **Reset**, and **Search**.

Click **Start Scanning** link to start the process of scanning each label. As each label is scanned there will be a beep from the system and a listing of the item will appear on the screen in the grid. You can delete a particular item if needed.



When you are finished scanning, click the **Stop Scanning** icon and select the **Continue** button.



The system then continues to function as described in the "Evidence Management Access" on page 421 section.

Click **Save** to save your changes and remain on the page.

Click **Save & Exit** to save your changes and exit the page.

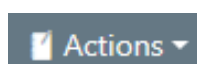
## Run Barcode Report

This link allows the Evidence Custodian to print a report showing the evidence locations in the evidence room, along with a corresponding **Barcode**. This allows agencies to scan the location with a barcode scanner rather than select it from the **List of Values** (LOV).

## Evidence Mega Menu

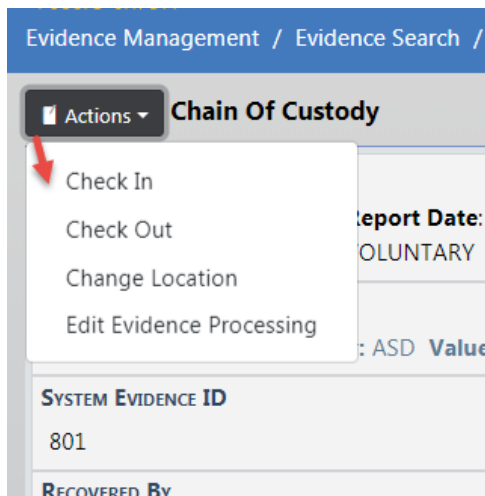
When viewing the Chain of Custody for any piece of evidence there is a **Mega Menu** to the top left. Evidence custodians can use this menu to take action and change the **Status** of the evidence item without leaving the window. The *Actions* available will be shown based on the **Current Status** of the evidence.

Mega Menu.



Click on the **Mega Menu** button to display a drop-down of items from which to choose.

Choices available under the **Mega Menu** vary depending on the evidence **Current Status**.

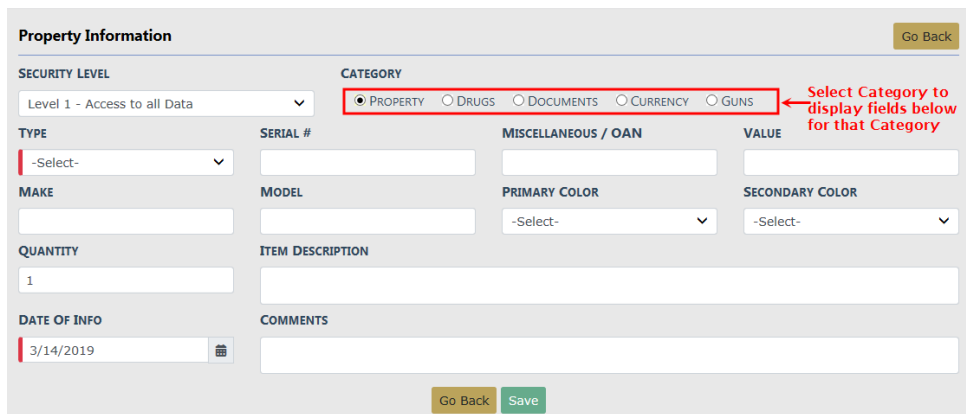


## Create Property Or Evidence Without An Incident Report

Officers can create property and indicate that the property is also evidence without creating an incident report. This functionality is not a part of the default setup but can be requested by an agency administrator if desired.

To create evidence without an incident report the officer goes to **Master Indices**, selects the *Property Tab*, then clicks the **Add Property** hyperlink. The **Add Property** screen appears to create the property. For information on accessing **Master Indices**, refer to "Master Indices" on page 71.

Click the **Category** to display additional fields specific to that Category to describe the property in more detail.



When all required information and as much other information as possible has been entered, click the **Save** button to add the property to the report.

The **Edit Property** screen appears. Click the **Add Evidence** hyperlink in the Evidence grid to add the property as evidence.

Go Back Log Property as Evidence View Summary Subscribe

Property Details

SmartSearch (0) -Add-

INDEX ID: 1844 CATEGORY: Property DATE OF INFO: 03/14/2019

TYPE: AUDIO TAPE/CD/DVD SERIAL #: SERIAL # MISCELLANEOUS / OAN: VALUE: 30

MAKE: Levi MODEL: PRIMARY COLOR: Blue SECONDARY COLOR: Black

QUANTITY: 1

ITEM DESCRIPTION: Laptop backpack.

OTHER COMMENTS:

Go Back Save

Evidence Add Evidence

People Add Person

The standard **Property Evidence** screen appears. Select the **Location** and enter other necessary information. Any field with a red left-hand border is a required field. You must complete required fields to continue. Optionally, click **Signature** to add a signature. Click **Save**.

Property Information Go Back

PROPERTY TYPE	SERIAL NUMBER	PROPERTY DESCRIPTION
BACKPACK		Laptop backpack.

Evidence Information

DATE/TIME RECOVERED: RECOVERY LOCATION: AGENCY: District 42, Versailles

DATE/TIME PLACED IN STORAGE: STATUS: Pending Check-In LOCATION: -Select-

CUSTODY FROM: Saur, Saur ITEM #: ITEM #

EVIDENCE DESCRIPTION: Laptop backpack.

EVIDENCE COMMENTS:

Extended Chain of Custody Add

Evidence Processing

Signature

Go Back Save

The **Edit Property** screen opens. The Property record now has a **Property Index Number** and **Evidence System ID** for tracking.

Go Back View Summary Subscribe

Property Details

1
SmartSearch (0)

**INDEX ID**

1844

CATEGORY

Property

DATE OF INFO

03/14/2019

SmartSearch (0)

-Add-

TYPE

BACKPACK

SERIAL #

MISCELLANEOUS / OAN

VALUE

30

MAKE

Levi

MODEL

PRIMARY COLOR

Blue

SECONDARY COLOR

Black

QUANTITY

1

ITEM DESCRIPTION

Laptop backpack.

OTHER COMMENTS

Go Back Save

**Evidence**

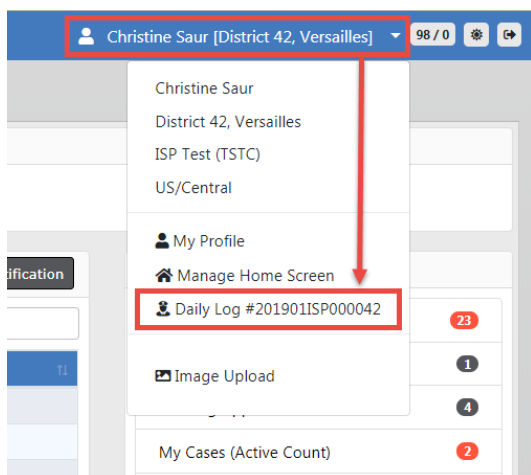
System Evidence ID	Agency	Status	Officer	Recovery Date	Description	Disposition	Scheduled Disposition Date	Item Number	Comments	A
787	District 42, Versailles	Pending Check-In	Saur, Christine, ID# SAUR111	02/14/2019						



# Chapter 24. Officer Daily Log

## Officer Daily Log (ODL) Overview

As an Officer, you can access your existing current log from the *Home* page by clicking on your user name in the upper right corner, then click **Daily Log** (notice the current log number also displays).



If a Daily Log has not yet been created, a **[New Daily Log]** option appears on the menu instead of the existing Daily Log that contains a number. Click on **[New Daily Log]** to create.

**NOTE:** For instructions on creating a new Daily Log, refer to "Create New Log" on the next page.

A law enforcement officer's **Daily Log** captures all the activity that the officer performs during the course of a shift. Assignments, issued equipment, report assignments and filings, and other activities are captured and summarized in the Officer **Daily Log**. The officer can enter data as needed, and certain activities, such as creation of incident reports, are automatically tracked in the log by the system.

**NOTE:** Once closed, the **Officer Daily Logs** are maintained in *Records Management*. Before a supervisor posts an officer's log, it can be viewed, edited or deleted by the owner of the log. Supervisors then post the logs in the *Records Management* area where they can be viewed as

needed. A supervisor must un-post a log using the **Un-Post** feature before the log can be corrected or modified again.

There are two tabs in the **Officer Daily Log**:

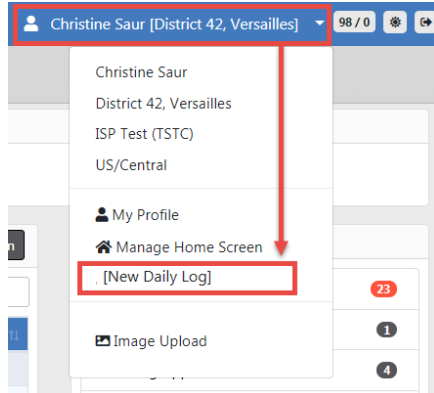
- Assignment Information
- Activity Log



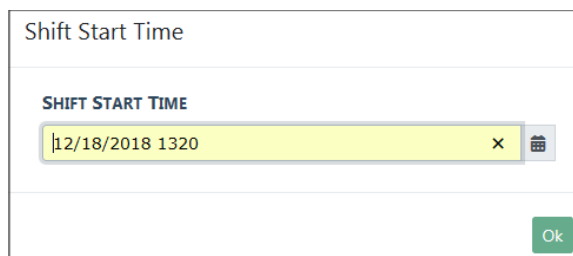
The screenshot shows the top portion of the Officer Daily Log interface. At the top right, there are three buttons: "Exit Log" (yellow), "Help / Tips" (grey), and "Close Log" (grey). Below these are two tabs: "Assignment Information" (highlighted with a red box) and "Activity Log" (grey). Under the "Assignment Information" tab, there are three fields: "DAILY #" with the value "2017071SP000030", "STATUS" with a dropdown menu showing "Open", and "ASSIGNMENT" with a dropdown menu showing "Officer Daily".

## Create New Log

You can create a new Daily Log from the *Home* page by clicking on your user name in the upper right corner, then click **New Daily Log**.



A *Shift Start Time* window opens, defaulting to the current date and time. Change the date and time if needed, then click **OK**.



The screenshot shows a "Shift Start Time" window. It has a title bar "Shift Start Time" and a subtitle "SHIFT START TIME". Below the subtitle is a text input field containing "12/18/2018 1320". To the right of the input field are a close button (x) and a calendar icon. At the bottom right of the window is an "Ok" button.



An *Assignment Information* form appears. Enter the appropriate information in the fields provided.

The screenshot shows the 'Assignment Information' form with the following details:

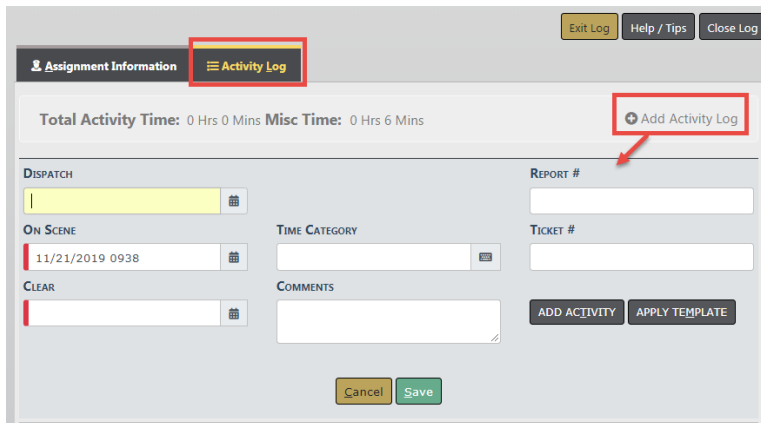
- Buttons:** Exit Log, Help / Tips, Close Log
- Assignment Information:**
  - DAILY #:** New
  - STATUS:** New
  - ASSIGNMENT:** -Select-
  - DATE:** 01/22/2019
  - SHIFT:** -Select-
  - NOTES:** (Empty text area)
  - REPORTING AREAS:** Click To Select
- Officers:**
  - Table with columns: Badge #, Name, On Time, Off Time, Actions
  - Row: SAUR111, Saur, Christine, 12/18/2018 13:20
- Vehicles:**
  - Table with columns: Plate #, Description, Actions
  - Content: No Vehicles Added
- Equipment:**
  - Table with columns: Description, Start Time, End Time, Actions
  - Content: No Equipment Added
- Buttons:** Save & Continue

- The **Daily#** generates a number for you systematically after saving the form.
- The **Status** defaults to *New*.
- Any field with a red left-hand border is a required field. You must complete required fields to continue.
- Select **Assignment** and **Shift** from the drop-down lists.
- Enter any **Notes** and select the **Reporting Area**.
- Complete the Officers, Vehicles, Equipment sections as needed.

**NOTE:** For more information on *Assignment Information*, refer to [AssignmentTab.htm](#).

Click **Save & Continue**.

An *Activity Log* tab opens. Click **Add Activity Log** to create an entry.



Enter data into the fields provided then click **Save**.

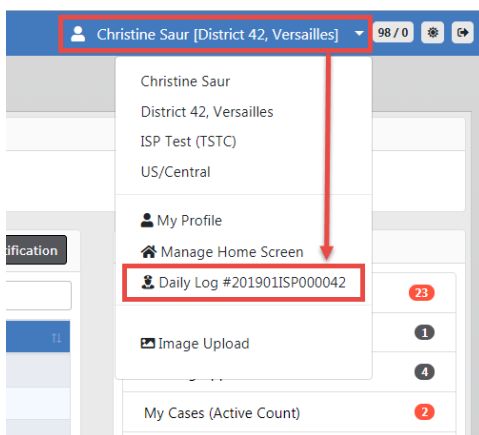
**NOTE:** For more information on the *Activity Log*, refer to "Activity Log Tab" on page 455.

To exit the log and come back to it later, click **Exit Log**, or to close and submit the log for supervisor review, click **Close Log**.



**NOTE:** For more information on exiting and closing the log, refer to "Exit or Close Daily Log" on page 462.

To access your own current log throughout the day, click on your user name on the *Home* page, then click **Daily Log**.



**NOTE:** For more information on accessing your current log, refer to "Officer Daily Log (ODL) Overview" on page 447.

## Assignment Tab

The Officer Daily Log defaults to the **Assignment Information** tab. Complete the top portion of the *Assignment Information*.

The screenshot shows the 'Assignment Information' tab with the following fields:

- DAILY #:** 201901ISP000042
- STATUS:** Open
- ASSIGNMENT:** Officer Daily
- DATE:** 01/22/2019
- SHIFT:** 8-5 Shift
- NOTES:** (Empty text area)
- REPORTING AREAS:** Click To Select

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

Complete the Officers, Vehicles, and Equipment sections as needed.

For more information on Officers, refer to "Officers" below.

For more information on Vehicles and Equipment, refer to "Vehicle & Equipment" on the next page.

## Officers

There may be times an additional officer needs to be added to the **ODL**. To do this, select **Add Officer** under the *Officers* section.

Officers					<a href="#">+ Add Officer</a>
Badge #	Name	On Time	Off Time	Actions	
SAUR111	Saur, Christine	07/24/2017 13:37			

Add Officer

---

**OFFICER**

Saur,Christine - #SAUR111 🗨

**ON TIME**

01/22/2019 0924 📅

**OFF TIME**

📅



---

Close
Ok

Start typing the officer's name/User ID in the Officer field to display a list of officers from which you can select.

If you need to select a different *On Time* you may use the Calendar tool to select a different date/time than the default.

Click **OK** and the Officer's information is added to the Officers grid.

Use the **Edit**  or **Delete**  icons to the right in the appropriate row of the grid/table to make changes as needed to your log.

**NOTE:** Agency specific values can be administered by an Agency Administrator under *Manage Agency*, and the **Officer Daily Log** tables under the *Agency Settings* tab.

**NOTE:** Additional officers added to the **Daily Log** must be added manually to the *Assignment* within **Fleet Management**. Refer to "Edit Vehicles " on page 607 for more information.

## Vehicle & Equipment

If the vehicle to which you are assigned does not auto-generate into the **ODL**, you will need to **Add** the vehicle.

Vehicles			+ Add Vehicle
Plate #	Description	Actions	

Add Vehicle

**MY ASSIGNED VEHICLES**  
 -Select Assigned Vehicle-

**VEHICLE**  
 [Red bordered input field]

**START MILES** [input] **END MILES** [input] **OFF DUTY MILES** [input] **TOTAL MILES** [input]

**FUEL (GALLONS)** [input] **FUEL TYPE** [-Select-] **TOTAL FUEL COST (DOLLARS)** [input]

**OIL (QUARTS)** [input] **TOTAL OIL COST (DOLLARS)** [input] **REPAIR COST (DOLLARS)** [input] **PAYMENT TYPE** [-Select-]

**FLUID COST (DOLLARS)** [input] **TOTAL COST (DOLLARS)** [input]

**VENDOR**  Select  Specify  
 [input]

**COMMENTS**  
 [input]

[Close] [Ok]

Click the **My Assigned Vehicles** field and choose a vehicle from the drop-down list. The **Vehicle** field will populate automatically. Or, you can add your own **Vehicle** by begin typing the **Unit #** or **Plate #** into the Vehicle field, then select the correct vehicle from the list that appears. It will auto-generate the **Start Miles** for you based on the previous users/your end miles. Select **OK**.

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

Select the **SR** button to create a new **Service Request** for the assigned vehicle. Refer to "Service Request" on the next page for more information.

Vehicles			+ Add Vehicle
Plate #	Description	Actions	
M12345	SR Unit #5701 2010 - Patrol	[edit]	[delete]

You may also **Add**, **Edit** or **Delete** equipment assigned to you.

Equipment				+ Add Equipment
Description	Start Time	End Time	Actions	
RADAR - Smith And Wesson Focus - new radar	07/24/2017 13:37		[edit]	[delete]
HANDCUFFS - Ruger Focus - test	07/24/2017 13:37		[edit]	[delete]



**NOTE:** If any Vehicles or Equipment have been taken out-of-service by an Agency Administrator prior to you closing your **ODL**, you will not be

able to close your **ODL** unless the Vehicle and/or Equipment is put back in service. This is why it is important to make sure you close your **ODL** after your shift is complete.

Select the **Update** button on the bottom of the page to save your work.

## Service Request

Select the **SR** button to create a new **Service Request** for the assigned vehicle, if applicable.

Vehicles			+ Add Vehicle
Plate #	Description	Actions	
M12345	SR Unit #5701 2010 - Patrol		

Select the **Request Type** from the drop down list, enter a description of what is needed, then click **Save**.

Vehicle Service Request

---

**REQUEST TYPE**

Repair ▼

**DESCRIPTION**

Leaking Oil.

---

Cancel
Save

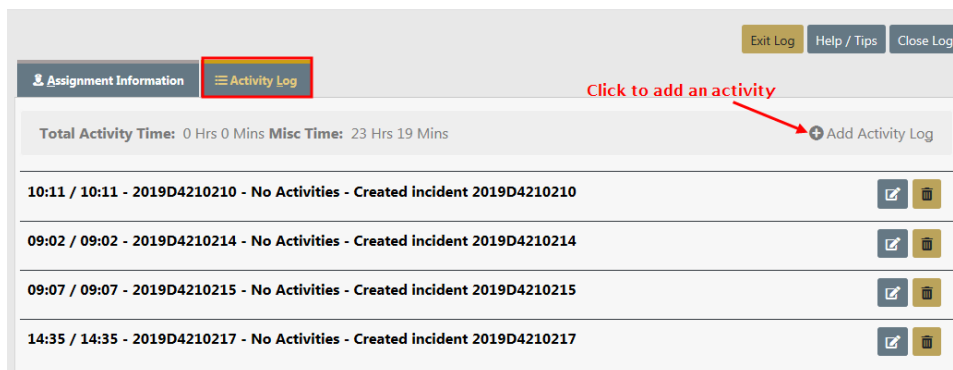
**NOTE:** The **Requesting Officer** defaults to the officer and the Status defaults to Pending.

A successful confirmation message briefly appears across the top of the window.

**NOTE:** Officers must edit **Services Requests** via the *Fleet Management* module. Refer to "Edit a Service Request " on page 619 for more information.

## Activity Log Tab

Click on the **Activity Log** tab to manage activity. You can add, edit, or delete records.



## Add Activity Log

Click the **Add Activity Log** link to add a new record.

**Dispatch:** Use the calendar tool to enter the dispatch date, and then type in the time you were dispatched to the scene. This may be auto-generated from CAD from the Dispatch Center.

**On Scene:** Current date is entered by the system, but you must enter the time you arrived on scene.

**Clear:** You must enter a date and time in these fields to save and/or continue.

**Time Category:** Start typing in this auto-complete field and the system displays a list of similar entries. Select the appropriate entry.

**Comments:** Type text in the text field. You can enter whatever information you want to include here, OR click **Apply Template** to copy standard text that has already been entered for you in a template.

**NOTE:** Administrators set up and maintain activity codes and templates in the *Tables* module. Administrators can refer to the *Tables* chapter in the RMS Administrator Guide for more information.

**Report #:** If applicable, enter a **Report Number**. If you completed an incident report as a part of this activity, you would enter the incident report number here.

**Ticket #:** If applicable, enter a **Ticket Number**. During the course of a traffic stop, you might issue a ticket or Citation. If so, you would record the ticket/Citation number here.

When all applicable fields are complete, select **Save** to save the record.

Continue working as follows:

Select **Add Activity Log** to enter another activity in the log.

## Edit Activity Log

Select **Edit** to the far right of a log entry to open it and make any changes.

## Delete Activity Log

Select **Delete** to the far right of the log entry to completely remove the entry.

## Switch to Edit Status

At this point you may choose to **Switch to Edit Status** if you have discovered something that would need editing.

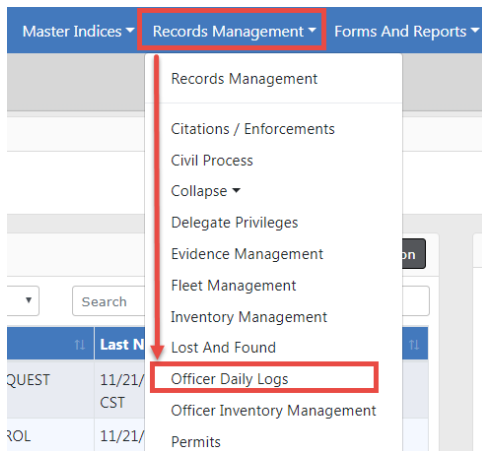
**NOTE:** For more information on switching to edit status, refer to "Switch to Edit Status" on page 465.

## Log Search

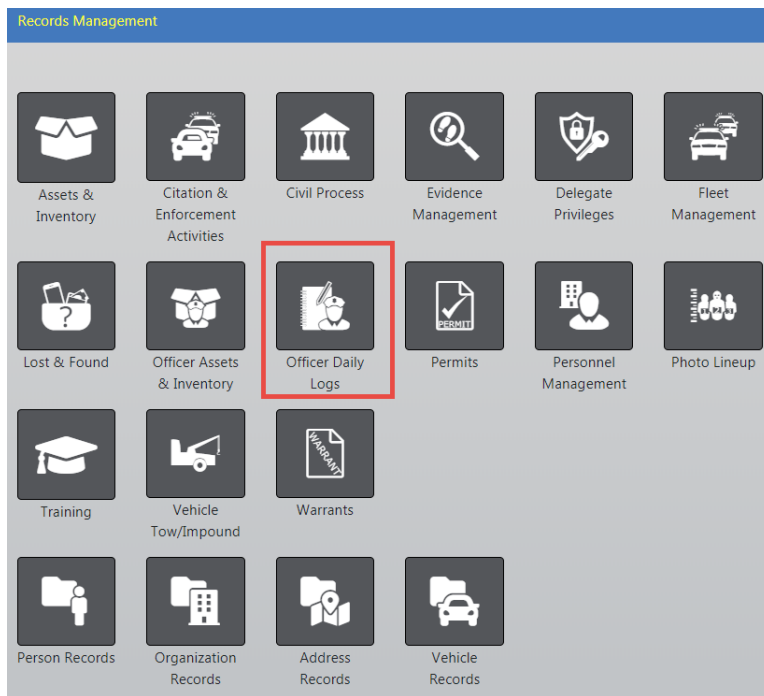
Use the following procedures to search Officer Daily Logs:

Select *Records Management* from the top menu, then select *Officer Daily Logs*.





Or, select *Records Management* to open the Records Management menu, then select *Officer Daily Logs*.



Whichever method you choose, the *Search Daily Logs* screen appears.

Records Management / Daily Log Search

### Officer Daily Log Search

DAILY #	STATUS	ASSIGNMENT	SHIFT
<input type="text"/>	-Select-	-Select-	-Select-
DATE FROM	DATE TO	POSTED	REPORTING AREA
<input type="text"/>	<input type="text"/>	-Select-	-Select-

**Officer**

FIRST NAME	LAST NAME	INTERNAL # / BADGE ID
<input type="text"/>	<input type="text"/>	<input type="text"/>




Go Back Reset Search

Complete fields to set search parameters or go directly to the next step to return ALL daily logs.

Select **Search** to display the *Daily Logs Search Results* page with a list of search results.

Refine Search New Search Post Selected Logs

1 result(s) found

Posted	Daily #	Date	Status	Assignment	Reporting Area(s)	Officers	Actions
	201901ISP000042	01/22/2019	Open	Officer Daily		Saur, Christine	  

Refine Search New Search Post Selected Logs

**NOTE:** If needed, select **Refine Search** to narrow the search results by adding more parameters, or click **New Search** to start over with a new search.

Select the View icon  to view a report.

Select the Edit icon  to edit a log.

Select the delete icon  to delete a log.

## Post and Un-post Logs

**NOTE:** Only supervisors with the proper role assignment can post and un-post daily logs.

Use the search feature to display a list of logs from which to choose. Refer to "Log Search" on page 456 for instructions on searching.

## Post Logs

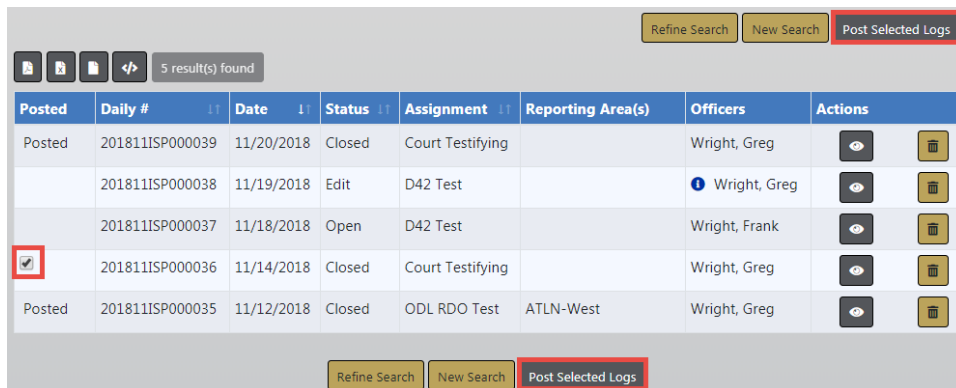
There are two ways to **Post** logs:

- Post a log you are currently viewing.
- Select and post one or more logs from the search results window.











### Post Logs from Search Results

Search for a group of logs to post. For more information on searching logs, refer to "Log Search" on page 456.

In the Search Results window there is a box under the *Posted* column, next to the Logs that have not yet posted. Select each log you wish to post, then click the **Post Selected Logs** button. For your convenience, there is a button on the bottom and on the top right.



The screenshot shows a search results window with a table of logs. The table has columns for 'Posted', 'Daily #', 'Date', 'Status', 'Assignment', 'Reporting Area(s)', 'Officers', and 'Actions'. The 'Posted' column has a checkbox for each row. The 'Post Selected Logs' button is highlighted in red at the top right and bottom center of the window.

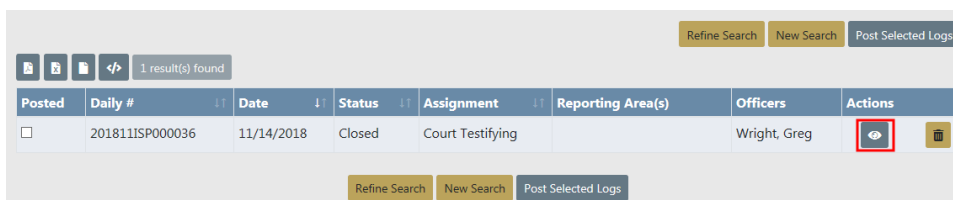
Posted	Daily #	Date	Status	Assignment	Reporting Area(s)	Officers	Actions
Posted	201811ISP000039	11/20/2018	Closed	Court Testifying		Wright, Greg	<input type="checkbox"/>  
	201811ISP000038	11/19/2018	Edit	D42 Test		Wright, Greg	<input type="checkbox"/>  
	201811ISP000037	11/18/2018	Open	D42 Test		Wright, Frank	<input type="checkbox"/>  
<input checked="" type="checkbox"/>	201811ISP000036	11/14/2018	Closed	Court Testifying		Wright, Greg	<input type="checkbox"/>  
Posted	201811ISP000035	11/12/2018	Closed	ODL RDO Test	ATLN-West	Wright, Greg	<input type="checkbox"/>  



The selected logs are now **Posted**.

## Post Current Log

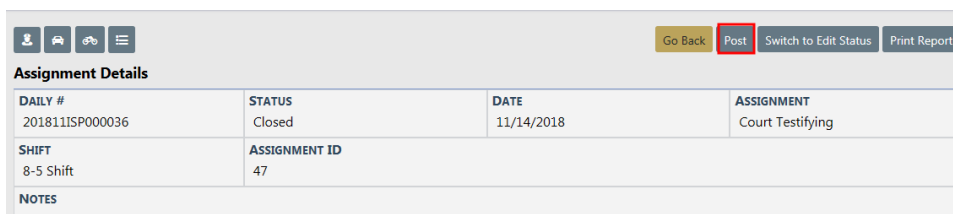
Search for the daily log you want to post. For more information on searching logs, refer to "Log Search" on page 456.

In the Daily Log Search Results window, click the View icon  in the *Actions* column of the log you want to post to display the *View Daily Log* page.



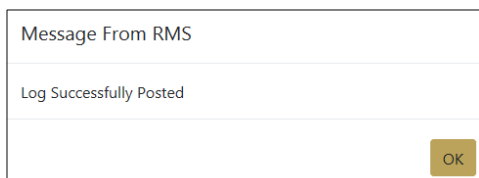
Posted	Daily #	Date	Status	Assignment	Reporting Area(s)	Officers	Actions
<input type="checkbox"/>	201811ISP000036	11/14/2018	Closed	Court Testifying		Wright, Greg	 

On the *View Daily Log* window select the **Post** button.



DAILY #	STATUS	DATE	ASSIGNMENT
201811ISP000036	Closed	11/14/2018	Court Testifying
SHIFT	ASSIGNMENT ID		
8-5 Shift	47		
NOTES			

A Successful dialog box displays. Select **OK**.



Message From RMS

Log Successfully Posted


**OK**

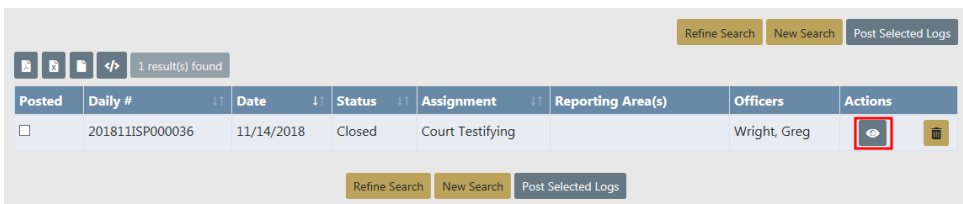
The log is now **Posted**.



## Un-Post Log

There may be times when a Daily Log needs to be un-posted. Perhaps one was posted by mistake, for example.

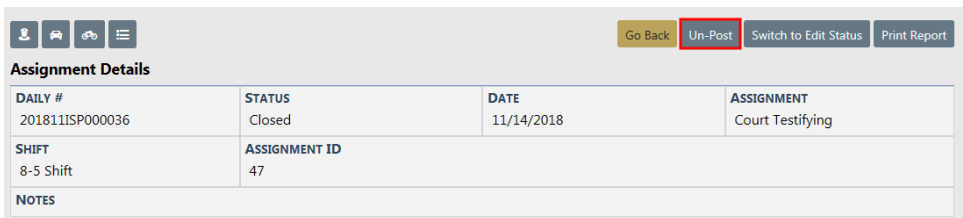
Use the *Officer Daily Logs Search* to find that specific log, defining your search parameters as specific as possible. Refer to "Log Search" on page 456 for instructions on searching.

In the Results window, click the view  icon in the *Actions* column of the log you want to un-post and it will display the *View Daily Log* page.



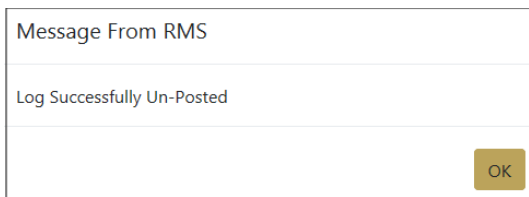
Posted	Daily #	Date	Status	Assignment	Reporting Area(s)	Officers	Actions
<input type="checkbox"/>	201811ISP000036	11/14/2018	Closed	Court Testifying		Wright, Greg	 

### Select **Un-Post**.



DAILY #	STATUS	DATE	ASSIGNMENT
201811ISP000036	Closed	11/14/2018	Court Testifying
SHIFT	ASSIGNMENT ID		
8-5 Shift	47		
NOTES			

A Successful dialog box displays. Select **OK**.



Message From RMS

Log Successfully Un-Posted

OK

The log can now be edited by the Officer who created it.

## Print Report

Daily Log Reports can be printed, saved to a file on your computer, or both.

Use the search feature to view the log you wish to print. Refer to "Log Search" on page 456 for instructions.

After you have searched and selected the Log you wish to print, click on the **Print Report** button on the *View Log* screen.

Go Back Post Switch to Edit Status Print Report

**Assignment Details**

DAILY #	STATUS	DATE	ASSIGNMENT
2018111SP000036	Closed	11/14/2018	Court Testifying
SHIFT	ASSIGNMENT ID		
8-5 Shift	47		
NOTES			

A PDF file downloads to your machine.

Click on the file to open the PDF in a new tab.

Click X to close

Print

FOR OFFICIAL USE ONLY (FOUO) 2018111SP000036

**Indiana State Police**  
 Officer Daily Log Summary  
 100 Senate Avenue Indianapolis, IN 46204  
 Phone: (317) 899 - 8293 Fax: (317) 233 - 3057

Daily #	Assignment	Activity Time	Date	Shift	Misc Time
2018111SP000036	Court Testifying	0 Hrs 5 Minutes	11/14/2018	8-5 Shift	0 Hrs 0 Minutes

Notes

**Officers**

Name	Start Date / Time	End Date / Time
Wright, Greg	11/14/2018 07:57	11/14/2018 07:58 Hrs

**Equipment**

Equipment	Start Date / Time	End Date / Time
FIRST_AID_KIT #369	11/19/2018 09:18 Hrs	11/19/2018 10:18 Hrs

Comments:  
asdd

**Activities**

Dispatch	On Scene	Clear
	11/14/2018 07:57 Hrs	11/14/2018 08:02 Hrs

Time Category  
Activities

Comments

Click on the **Print** icon to print.

Click on the **X** to close the tab.

## Exit or Close Daily Log

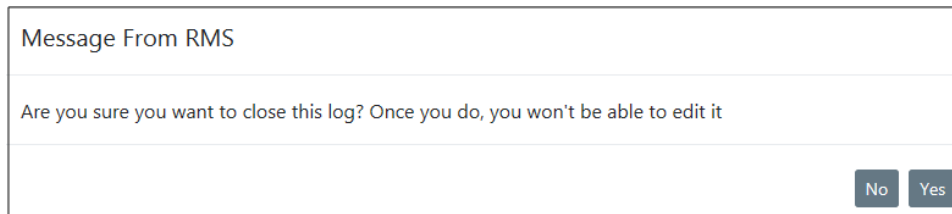
You have the option to exit or close the ODL. There is a difference between the two.

Exit Log Help / Tips Close Log

Assignment Information Activity Log

## Close the Daily Log

The last button at the top of the **ODL** is the **Close Log** button. Use this button to close your log at the end of the day/shift and make it available to your supervisor for review and posting. Once you select this option, you will not be able to edit the log.



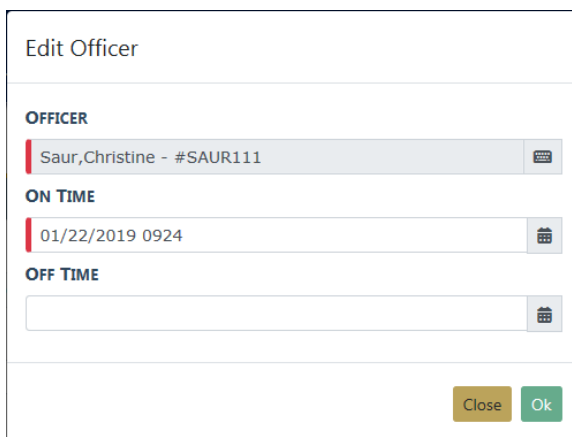
Message From RMS

Are you sure you want to close this log? Once you do, you won't be able to edit it

No Yes

Click **Yes** to begin the close process, or click **No** to return to the *Activity Log* tab.

If you clicked **Yes**, an **Edit Officer** window appears.



Edit Officer

**OFFICER**

Saur,Christine - #SAUR111

**ON TIME**

01/22/2019 0924

**OFF TIME**

Close Ok

Select the **Off Time** for EACH officer that was on the **ODL**. Select **OK**.

If the log has vehicles or equipment, a separate window displays allowing you to select the **Ending Mileage** for the vehicle and any other appropriate fields that need to be filled in. Once those fields are complete; select **OK**.

A separate window displays for the equipment, if any. Apply the necessary data then select **OK**.

The *View Log* window displays, showing a status of **Closed**.

**View Log**

Go Back Post Switch to Edit Status Print Report

**Assignment Details**

<b>DAILY #</b> 201901ISP000042	<b>STATUS</b> Closed	<b>DATE</b> 01/22/2019	<b>ASSIGNMENT</b> Officer Daily
<b>SHIFT</b> 8-5 Shift	<b>ASSIGNMENT ID</b> 53		
<b>NOTES</b>			

**Officers**

Badge #	Name	On Date/Time	Off Date/Time
SAUR111	Saur, Christine	01/22/2019 09:24	01/22/2019 15:30

**Vehicles**

License	VIN	Description	Start Mileage	End Mileage	Total Miles	Costs	Comments
		2015 TOYOTA(TOYo) Highlander					

**Activities** Total Activity Time: Misc Time: 6 Hrs 6 Minutes Expand All | Collapse All

Dispatch Date/Time	On Scene Date/Time	Clear Date/Time	Report #	Ticket #	# Activities	Time Category
	02/06/2019 10:11	02/06/2019 10:11	2019D4210210		0	

If you have discovered you need to make a correction to the Daily Log, click on the **Switch to Edit Status** button.

Go Back Post Switch to Edit Status Print Report

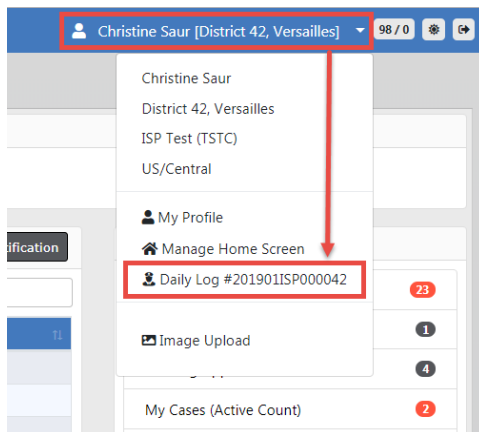
**NOTE:** For more information on switching to edit status, refer to "Switch to Edit Status" on the facing page.

## Exit the Daily Log

The first button on the top of the **ODL** is the **Exit Log** button. Use this button to exit your log but not close it.

You can return to your active log at any time by selecting the **ODL** that is active. For more information on accessing your current active log, refer to "Officer Daily Log (ODL) Overview" on page 447.

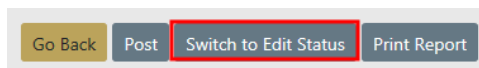




## Switch to Edit Status

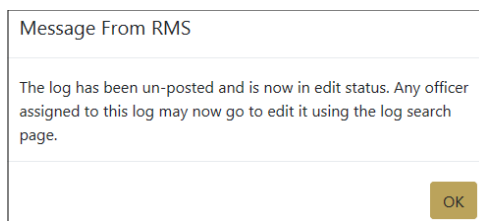
You can **Switch to Edit Status** if you have discovered a Daily Log needs editing.

If you have just closed the log, a **Switch to Edit Status** button appears near the top right of the form. If you closed the log earlier, then you need to search for and select the Daily Log to see the button.



For more information on searching for a Daily Log, refer to "Log Search" on page 456.

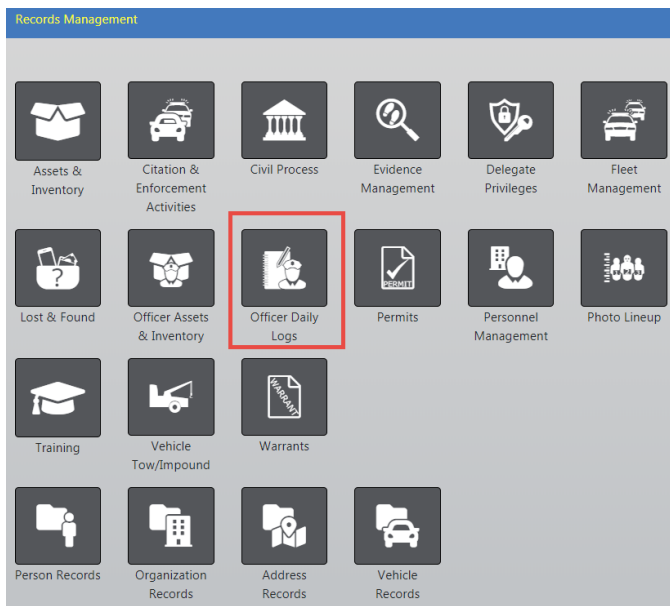
When you select the **Switch to Edit Status** button an un-posted confirmation message appears.



Select **OK**.

Select **Go Back**.

Click on the **Officer Daily Logs** hyperlink on the *Records Management* screen.



The *Search Daily Logs* screen appears.

The 'Officer Daily Log Search' form includes the following fields and controls:

- DAILY #**: A text input field.
- STATUS**: A dropdown menu with '-Select-' as the current selection.
- ASSIGNMENT**: A dropdown menu with '-Select-' as the current selection.
- SHIFT**: A dropdown menu with '-Select-' as the current selection.
- DATE FROM**: A date picker field.
- DATE TO**: A date picker field.
- POSTED**: A dropdown menu with '-Select-' as the current selection.
- REPORTING AREA**: A dropdown menu with '-Select-' as the current selection.
- Officer** section with three input fields: **FIRST NAME**, **LAST NAME**, and **INTERNAL # / BADGE ID**.
- Buttons at the bottom: **Go Back**, **Reset**, and **Search**.

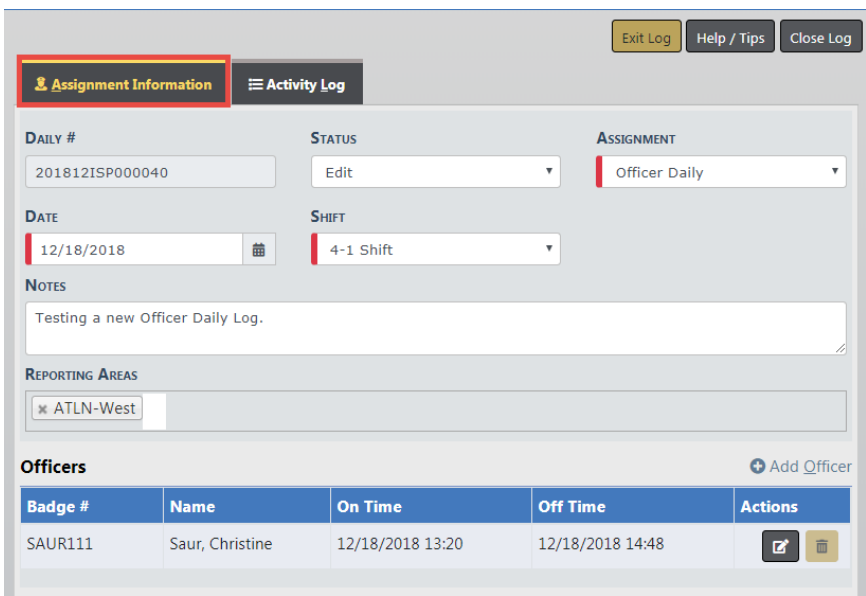
Enter the search criteria then select **Search** to display the search results. For more information on searching, refer to "Log Search" on page 456.

The search results window shows 1 result(s) found. The results are displayed in a table with the following data:

Posted	Daily #	Date	Status	Assignment	Reporting Area(s)	Officers	Actions
	201901ISP000042	01/22/2019	Open	Officer Daily		Saur, Christine	

Buttons at the top and bottom of the results window include: **Refine Search**, **New Search**, and **Post Selected Logs**.

Select the Edit icon in the results window to open the log in edit mode.



Make the necessary updates, then select **Close Log** to close the log. You have to complete the same steps that you completed when you initially closed the log. The status is now **Closed**.

For more information on the *Assignment Information* tab, refer to "Assignment Tab" on page 451.

For more information on the *Activity Log* tab, refer to "Activity Log Tab" on page 455.

For more information on closing the daily log, refer to "Exit or Close Daily Log" on page 462.

## Help and Tips


For Help with the Officer Daily Logs, Select the **Help/Tips** button. This window will display information about entering dates and times, using auto-complete fields and keyboard shortcuts.

### Officer Daily Log Help

The following are some useful tips when using Officer Daily Logs to make for a faster experience.

- Dates and Times**

When entering *end* dates, whether they be for officer date/times or activity clear times, if you know the amount of time spent you can enter it directly in the date field and the end date/time will be determined for you. You can enter in values like "1h15m" which will add 1 hour and 15 minutes to the on scene date and show the computed date/time for you. To make this happen, simply enter the amount of time spent and press the TAB key to have the application compute the difference.
- Auto Complete Fields**

Fields with this icon next to it are autocomplete: 

Officers, vehicles, equipment, time category codes, and activity codes are all entered using auto complete functionality. To use this feature, simply start typing the name of what you're looking for, and a search will be performed based on what you typed. You can then select a result by either using the keyboard or by clicking on it with your mouse.

Time category codes and activity codes allow you to perform a smart search. You can use + and - to indicate what has to be included, and what must be excluded. You can also use brackets to specify a certain phrase must be included.

For example, the query **-person +[business check]** indicates the word "person" must NOT be included, while the phrase "business check" **MUST** be included.

Close

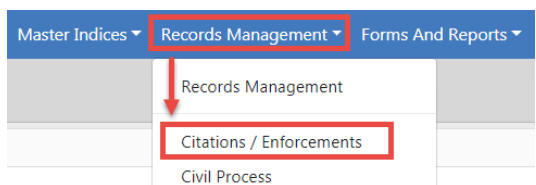
Click **Close** to close the window.

# Chapter 25. Citations Enforcement

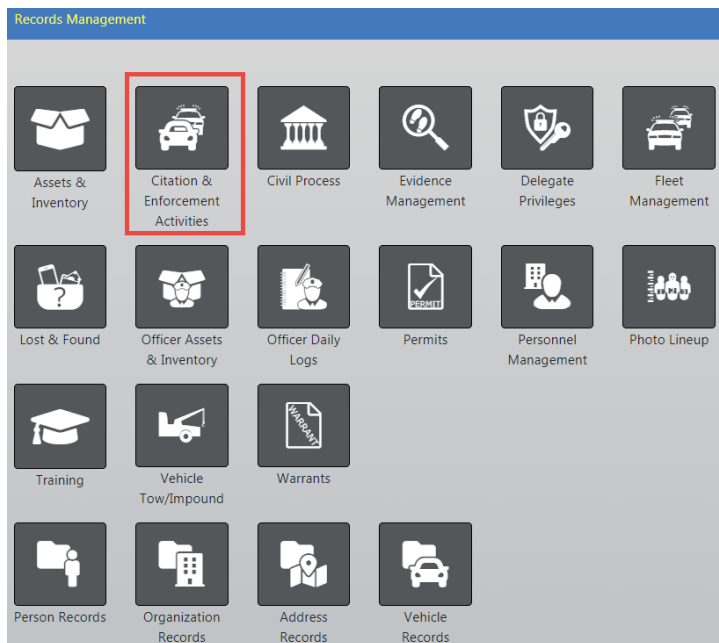
## Citations/Enforcement Overview

This module is a collection of Citation/Enforcement activities against persons, businesses, and/or vehicles. These activities can be related to Incident Reports, other Citation/Enforcement Activities, and other defined report types.

To access **Citation/Enforcement** records, select the **Citations/Enforcements** option from the *Records Management* drop-down menu or select the **Citation/Enforcement Activities** icon/link from the *Records Management* main page.



OR



After selecting one of the above options, the **Citation Search** page opens. You can either search for an existing citation by entering search criteria into the available field then click **Search**, or click the **Add Citation** button to add a new citation.

**Citation Search** Add Citation

TICKET #

ENFORCEMENT TYPE

ISSUING AGENCY

PLAINTIFF

LOCATION TYPE

CITY

COUNTY

INDEX ID

ENFORCEMENT DATE FROM

ENFORCEMENT TIME FROM

ENFORCEMENT DATE TO

ENFORCEMENT TIME TO

FILED DATE FROM

FILED TIME FROM

FILED DATE TO

FILED TIME TO

**Charges**

CHARGES

SELECTED CHARGES Double Click to Remove

NATURE OF OFFENSE

**Citing Officer**

FIRST NAME

LAST NAME

BADGE #

ADDITIONAL SEARCH CRITERIA

## Add a New Citation

1. To **Add** a new **Citation**, select the **Add Citation/Enforcement** link on the **Citation/Enforcement Activity** page to display the **Citation Search** page.

2. Click the **Add Citation** button on the top right to display the **Add Citation** page.

3. Add the necessary information then click **Save**.

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

4. An **Officer Question** window displays.

Message From RMS

---

Are you the citing officer?

5. Select **Yes** to add you to the **Citation** as the officer automatically, or **No** to manually add the officer.
6. Enter the necessary information on the **Edit Citation/Enforcement Details** page. For detailed instructions see "Enter or Update Citation Details" on page 477.

Go Back Duplicate Print

**Citation / Enforcement Details** Highlighted fields are required for racial profiling

<b>INDEX ID</b> 397	<b>TICKET #</b> T12445652	<b>ENFORCEMENT TYPE</b> Ordinance Violation
<b>ISSUING AGENCY</b> District 42, Versailles	<b>PLAINTIFF</b> The People of the State of Maryland	
<b>LOCATION TYPE</b> Private Property or Other	<b>CITY</b> -- Select --	<b>COUNTY</b> Benton
<b>ENFORCEMENT DATE</b> 03/14/2019 1404	<b>FILED DATE</b> 03/14/2019 1404	<b>TOWNSHIP RD</b> <input type="checkbox"/>

**Fields**

**STOP ID**

---

**Person** Quick Search + Advanced Search

**Racial Profiling**

<b>PERCEIVED RACE</b> -- Select --	<b>RACE KNOWN AT TIME OF STOP</b> <input type="checkbox"/>	<b>DURATION OF STOP</b> -- Select --
<b>TYPE OF SEARCH</b> -- Select --	<b>ARRESTED</b> -- Select --	<b>CONTRABAND FOUND</b> -- Select --
<b>RESULT OF STOP</b> -- Select --	<b>USE OF PHYSICAL FORCE</b> -- Select --	

## Edit Citation

1. Complete the necessary fields on the **Citation/Enforcement Activities** page to search for the **Citation** you want to **Edit**.



**Citation Search** Add Citation

TICKET #  ENFORCEMENT TYPE  ISSUING AGENCY

PLAINTIFF  LOCATION TYPE  CITY

COUNTY  INDEX ID

ENFORCEMENT DATE FROM  ENFORCEMENT TIME FROM  ENFORCEMENT DATE TO  ENFORCEMENT TIME TO

FILED DATE FROM  FILED TIME FROM  FILED DATE TO  FILED TIME TO

**Charges**

CHARGES

SELECTED CHARGES Double Click to Remove

NATURE OF OFFENSE

**Citing Officer**

FIRST NAME  LAST NAME  BADGE #

ADDITIONAL SEARCH CRITERIA

Go Back Reset Search

The **Nature of Offense** field is free text that allows you to enter additional charging information not contained in the Charge Code LOV. For agencies having an interface that imports citation data into Online RMS from an *eCitation System*, the **Nature of Offense** field contains charging descriptions as entered in the *eCitation System* when a charge code does not exist in Online RMS.

The **Additional Search Criteria** allows you to include information from a specific section, if needed. Additional search fields appear if you choose one of the available options from the list.

**ADDITIONAL SEARCH CRITERIA**

- Select --
- Location
- People
- Officers
- Vehicles
- Gangs
- Organizations
- Custom Fields

**Note:** *Custom Fields* is available for agencies that have the *Custom Fields* feature enabled. *Custom Fields* captures data defined by the agency. For more information refer to your administrator.

- Click the **Search** button to display the **Search Citations** results grid with a list of records matching the search criteria.

Index ID	Ticket #	Enforcement Type	Issuing Agency	Enforcement Date	County	Actions
377	DM123456	Equip, Reg or Inspection Violation	District 34, Jasper	06/22/2017 02:30	Bartholomew County	

You have the ability to export the search results to various file types such as, PDF, MS Excel, CSV, and XML using icons above the IndexID on the Search Results grid. For more information refer to "Export Search Results" on page 31.

Click the **Add Citation** button to add a new citation. For more information on adding a new citation refer to "Add a New Citation" on page 470.

Your assigned roles determine which actions are available to you from the *Actions* column, located on the right. If an icon does not appear in the Action column then you do not have the ability to perform that action.

For example, if the **Delete** icon does not appear in the *Action* column, then you do not have the ability to delete that item.

- The **View** icon allows you to view a snapshot of the record listed. For more information on viewing Citations refer to "View Citation" on the facing page.
- The **Edit** icon allows you to open and edit the record listed.
- The **Delete** icon allows you to delete the record listed. For details on deleting Citations refer to "Delete Citation" on page 484.

Click **Refine Search** or **New Search** to return to the **Citation Search** page, where you can redefine your search, start a new search (click **Reset** to clear all fields), or **Go Back** to return to the previous page.

- Click the **Edit** icon to open the **Edit Citation/Enforcement Details** page.

There are several sections that make up this page. Each available section is listed in the **Go To** area at the top of the page as a link. Select any link to go directly to the corresponding section or scroll down the page to each section.

**Citation / Enforcement Details** Highlighted fields are required for racial profiling

INDEX ID	TICKET #	ENFORCEMENT TYPE
397	T12445652	Parking Meter
ISSUING AGENCY	PLAINTIFF	
District 42, Versailles	The People of the State of Maryland	
LOCATION TYPE	CITY	COUNTY
-- Select --	-- Select --	Benton
ENFORCEMENT DATE	FILED DATE	TOWNSHIP RD
03/14/2019 1404	03/14/2019 1404	

**Fields**

STOP ID

Click on the **Duplicate** button to create another **Citation** identical to the one you are on. For more information refer to "Duplicate Citation" on page 483.

Click on the **Print** button to print the **Citation**. For more information refer to "Print Citation" on page 485.

4. Complete all applicable sections. For detailed instructions see "Enter or Update Citation Details" on page 477.

## View Citation

1. Complete the necessary fields on the **Citation Search** page to search for the **Citation** you want to **View**.

2. Click the **Search** button to display the **Search Citations** results grid with a list of records matching the search criteria.

Index ID	Ticket #	Enforcement Type	Issuing Agency	Enforcement Date	County	Actions
377	DM123456	Equip, Reg or Inspection Violation	District 34, Jasper	06/22/2017 02:30	Bartholomew County	

3. Click the **View** icon to open the **Citation/Enforcement Details** page.
4. Click on the **Go Back** button to return to the search results, or click on the **Print** button to print the **Citation**. For more information refer to "Print Citation" on page 485.

## Enter or Update Citation Details

Whether you are creating a new **Citation** or updating one that already exists, the process of entering the details is fundamentally the same.

Citation data is grouped into various sections: enforcement details, persons, vehicles, locations, violations, officers, related reports, file attachments, etc. Each section contains information unique to that section. For example, Bond Type is located only under the Bond section of the Citation.

The **Citation** module utilizes *Master Indices*. *Master Indices* are centralized pieces of data that are accessed from different modules of the system for consistency. Each index is represented only once, such as a person, an address, a vehicle, a location, and the organization.

**NOTE:** For more information on *Master Indices* refer to "Master Indices" on page 71.

Sections containing **Quick Search** and **Advanced Search** links utilize the *Master Index*. You must first search the *Master Index* to determine whether or not this data already exists before adding or updating. If the record exists, you must use it in the **Citation**. If the record doesn't exist, then you can create it, providing you have the proper permissions. For more information on permissions see your administrator.

Click the **Save** button in each section to save the entered data. Whenever you save, a flashing notification at the top of the page indicates that the data has been added.

## Person, Vehicle, Location, Organization

**Person** Quick Search Advanced Search

**Racial Profiling**

PERCEIVED RACE: -- Select --  
RACE KNOWN AT TIME OF STOP:   
DURATION OF STOP: -- Select --

TYPE OF SEARCH: -- Select --  
ARRESTED: -- Select --  
CONTRABAND FOUND: -- Select --

RESULT OF STOP: -- Select --  
USE OF PHYSICAL FORCE: -- Select --

COMMENT:

Save

**Vehicle** Quick Search Advanced Search

**Location** Quick Search Advanced Search

**Organization** Quick Search Advanced Search

The Enforcement Type determines whether or not the racial profiling fields appear

There are two types of searches:

### Quick Search

- Limited Master Index search. For example, for person you can only search by last name, first name, DOB, sex, race, and driver's license number.

### Person Example

Quick Search

LAST NAME:   
FIRST NAME:   
DOB:

SEX: -Sex-  
RACE: -Race-  
DRIVERS LICENSE:

Reset Search

Close Advanced Search / Add

### Vehicle Example

Quick Search

VIN:   
LICENSE PLATE:   
LICENSE STATE: -Select-

Reset Search

Close Advanced Search / Add

### Advanced Search

- Extensive Master Index search. For example, in addition to the Quick Search criteria for person, you can also search by age, middle name, physical features, age range, and more.
- This feature also allows you to add new *Master Index* records if they don't already exist, providing you have the proper permissions. See your administrator for more information.

### Person Example

Additional search criteria → Mug Shot Search - By Physical Description Add Person

Person

LAST NAME FIRST NAME MIDDLE NAME

TITLE DOB AGE

RACE SEX INDEX ID

DRIVERS LICENSE DRIVERS LICENSE STATE SSN

NAME TYPE CREATOR

CREATION DATE FROM CREATION DATE TO

PHONETIC SOUNDEX STATEWIDE SEARCH SEARCH PREFERENCE

ALL ANY

ADDITIONAL SEARCH CRITERIA

Search External Systems

Go Back Reset Search

### Vehicle Example

Add Vehicle

Vehicle

YEAR MAKE MODEL

VIN TYPE STYLE

LICENSE PLATE LICENSE STATE INDEX ID

CREATOR

CREATION DATE FROM CREATION DATE TO SEARCH PREFERENCE

ALL ANY

ADDITIONAL SEARCH CRITERIA

Search External Systems

Go Back Reset Search

## Racial Profiling

The **Enforcement Type** determines whether or not the Racial Profiling fields appear. For example, the fields appear when *Ordinance Violation* is chosen, but not for *Parking Meter*.

Select an option from the drop-down menu in each field of the **Racial Profiling** section. Click the **Race Known At Time of Stop** button if it is a true statement; green represents true and gray represents false.

## Violations and Charges

For Violations, enter the **Posted Speed Limit** and **Actual Speed limit**, if applicable, and select one or multiple violation **Methods** from the drop-down list.

Click **Save**.

Click on the **+Add Charge** link to open the **Citation Charge** window. Begin typing the desired Charge Statute to view a list of similar charges then select the one you need from the list.

Select the **Class** and **Disposition**. These each contain a drop-down list in accordance with the **Charge Statute** selected.

Complete all other fields required by your Agency, then click **Save**.

**NOTE:** Multiple charges can be listed on one citation (according to your Agency). You must add additional items for each charge (Class, Disposition etc.).

Click **+Add Charge** to add additional charges, if applicable. Click **Save** after entering each **Charge**.

Click **Go Back** to return to the previous page.

## Bond

To enter Bond information, select the **Bond Type** from the drop-down list, enter the **Bond Amount**, **Appearance Date**, and click the **Must Appear** button if the person must



appear; the button turns green when selected.

Click **Save**.

## Associate Incident Reports

You can associate Incident Reports to the Citation. Click on **+Add Incident Report** to open the Incident Search screen, search for the incident and select it. For more information on searching Incidents, refer to "View Incident Reports" on page 222.

## Relate Citations

You can associate other citations with the current citation. Click **+Add Citation/Enforcement**, enter the **Enforcement Ticket#** in the field provided, click **Quick Search**, then select the appropriate Citation from the results list.

Related Citations / Enforcements + Add Citation / Enforcement

Enforcement Ticket # 2018CL01 x Quick Search Cancel

Index ID	Ticket Number	Enforcement Date	Enforcement Type	Agency	Actions
393	2018CL01	02/08/2019 16:00	Parking Meter	District 42, Versailles	

Cancel

## Associate Other Related Reports

You can associate other reports as defined by your agency. Click **+Add Report** to open the *Add Related Report* window, enter the **Report #**, select the **Report Type** from the drop-down list, enter necessary **Comments**, then click **Save**.

Add Related Report

<b>REPORT #</b>	<b>REPORT TYPE</b>
2018RCF55	Court Case
<b>COMMENTS</b>	
This is an example.	

Cancel Save

## Attached Forms

If applicable to your agency, you can attach a custom form. Select an item from the Add Form drop-down list to open the chosen form. Complete the necessary fields, then click **Save** to remain on the form, or **Save And Exit** to save the form and return to the Citation.

Attached Forms

Add Form

- Select-
- 1 Custom Form to Rule Them All
- Derek Test Form
- Inheritance Test Form
- RMS Demo Form
- TTN114300

Go Back

## Attachments

You can add photos and documents to the Citation. Click on **+Add Attachment** to open the *Add Attachments* screen. For more information on Attachments, refer to "Attachments" on page 59.

## All Other Sections

Data entry in all other sections are fundamentally similar to adding Charges, but with different information.

# Duplicate Citation

In cases where two or more people are being cited for the same charge(s), it may be more efficient to create one ticket, duplicate it, and then edit the duplicate for another person. The process can be repeated as many times as needed.

1. After entering and saving the **Citation**, click the **Duplicate** button to open the **Duplicate Citation** window.

**Citation / Enforcement Details**  Highlighted fields are required for racial profiling

<b>INDEX ID</b> 397	<b>TICKET #</b> T12445652	<b>ENFORCEMENT TYPE</b> Parking Ticket (Non-Meter)
<b>ISSUING AGENCY</b> District 42, Versailles	<b>PLAINTIFF</b> The People of the State of Maryland	
<b>LOCATION TYPE</b> Private Property or Other	<b>CITY</b> -- Select --	<b>COUNTY</b> Benton
<b>ENFORCEMENT DATE</b> 03/14/2019 1404	<b>FILED DATE</b> 03/14/2019 1404	<b>TOWNSHIP RD</b> <input type="checkbox"/>

Duplicate Citation

Select what information you want to duplicate

**ITEMS TO DUPLICATE**

Location  Person  Organization  Vehicle  Citing Officer  Other Officers  Employees

Bond

**TICKET #**

**COMMENTS**

Cancel Duplicate

2. In **Items To Duplicate**, click on the **x** to remove items you do not want to duplicate, or click into the field to choose additional items from a drop-down list.
3. Enter the **Ticket #** for this Citation.
4. Enter any additional comments.
5. Click the **Duplicate** button at the bottom of the window to display the message prompt:

Message From RMS

Citation/Enforcement Duplicated, would you like to edit it now?

No Yes

- Click **Yes** to open the new citation in the **Edit Citation/Enforcement Details** page and edit it as needed. For more information on editing a citation refer to "Edit Citation" on page 472.

## Delete Citation

On rare occasions you may need to delete a **Citation**, if you have proper permissions to do so.

- Complete the necessary fields on the **Citation Search** page to search for the **Citation** you want to **Delete**. For more information on searching for a Citation, refer to "Edit Citation" on page 472.

**Citation Search** Add Citation

TICKET #	ENFORCEMENT TYPE	ISSUING AGENCY	
<input type="text"/>	-Select-	All Agencies	
PLAINTIFF	LOCATION TYPE	CITY	
<input type="text"/>	-Select-	-Select-	
COUNTY	INDEX ID		
-Select-	<input type="text"/>		
ENFORCEMENT DATE FROM	ENFORCEMENT TIME FROM	ENFORCEMENT DATE TO	ENFORCEMENT TIME TO
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
FILED DATE FROM	FILED TIME FROM	FILED DATE TO	FILED TIME TO
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Charges**

CHARGES

SELECTED CHARGES Double Click to Remove

NATURE OF OFFENSE

**Citing Officer**

FIRST NAME	LAST NAME	BADGE #
<input type="text"/>	<input type="text"/>	<input type="text"/>


ADDITIONAL SEARCH CRITERIA

-Select-

Go Back Reset Search

- Click the **Search** button to display the **Search Results** page with a list of records matching the search criteria.

Index ID	Ticket #	Enforcement Type	Issuing Agency	Enforcement Date	County	Actions
377	DM123456	Equip, Reg or Inspection Violation	District 34, Jasper	06/22/2017 02:30	Bartholomew County	

The **Delete** icon  in the *Actions* column allows you to **Delete** the record listed. If the delete icon does not display, then it is likely you do not have permissions to delete it. For more information on permissions refer to your administrator.

3. Click the **Delete** icon on the record you want to delete. A confirmation window appears.

Message From RMS

Are you sure you want to delete this citation? Deleting this citation will also remove any associations.

No Yes

4. Click **Yes** to delete or click **No** to return to the search results without deleting. If you clicked **Yes**, a comment window appears.

Delete Citation Comments

DELETE COMMENT

Created in error.

Cancel Delete

5. Enter the reason for deleting the Citation then click **Delete**.

## Print Citation

You can print a citation you are viewing or editing.

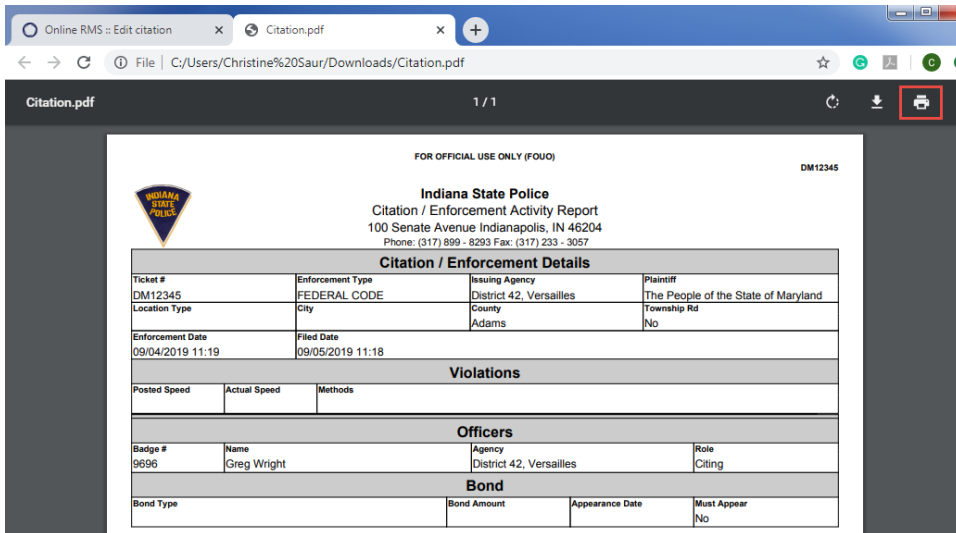
For more information on editing a citation refer to "Edit Citation" on page 472.

For more information on viewing a citation refer to "View Citation" on page 475.

1. Click the **Print** button while on the **Edit Citation/Enforcement Activity** page or the **View Enforcement** page.



2. A PDF file downloads to your machine.
3. Click on the file to open the PDF in a new tab.
4. Click on the **Print** icon to print.



5. Click the **X** on the tab heading to close the tab.

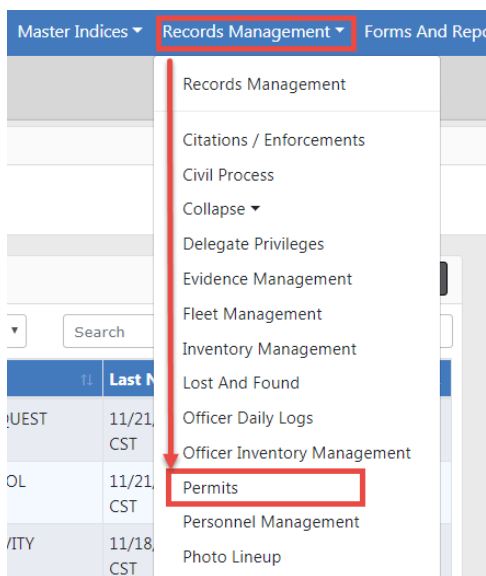
# Chapter 26. Permits

## Permits Overview

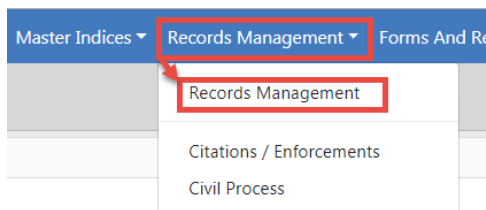
The **Permits** module allows you to view, create, or modify permit information. **Permits** include alcohol permits, bicycle licenses, burning permits, gun purchase permits, parking permits and so forth. The type of permits is controlled by the Agency Administrator.

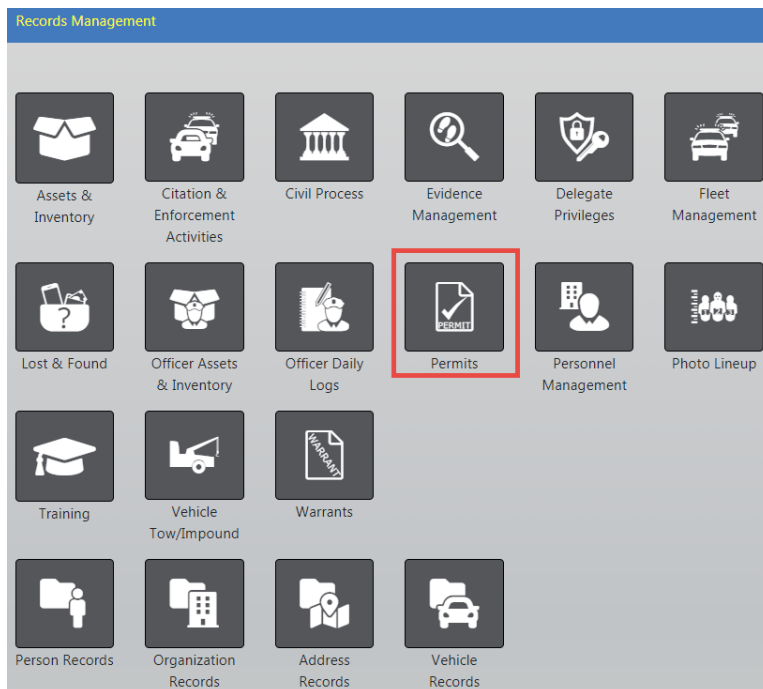
There are two ways to access the **Permit** module:

1. Click *Records Management* on the navigation bar, then click the **Permits** option from the drop-down menu.



2. Or click *Records Management* on the navigation bar, click the **Records Management** option from the drop-down menu, then click the **Permits** icon/link.





Either option opens the *Permit Search* page.

 A screenshot of the 'Permit Search' form. The form is titled 'Permit Search' and includes an 'Add Permit' button in the top right corner. It contains several search criteria fields:
 

- PERMIT #**: A text input field.
- AGENCY**: A dropdown menu with 'All Agencies' selected.
- PERMIT TYPE**: A dropdown menu with '-Select-' selected.
- PURCHASE TYPE**: A dropdown menu with '-Select-' selected.
- STATUS**: A dropdown menu with '-Select-' selected.
- REASON**: A dropdown menu with '-Select-' selected.
- PERMIT ID**: A text input field.
- SHOW DATE CRITERIA**: A checkbox that is currently unchecked.
- ADDITIONAL SEARCH CRITERIA**: A dropdown menu with '- Select -' selected.

 At the bottom of the form, there are three buttons: 'Go Back', 'Reset', and 'Search'.

## Search Permits

From the **Permit** page complete as many of the fields in the *Permit Search* section as you can.

If applicable, click the **Show Date Criteria** button to open the *Date Criteria* section.



**Permit Search** Add Permit

PERMIT #  AGENCY  PERMIT TYPE

PURCHASE TYPE  STATUS  REASON  PERMIT ID

SHOW DATE CRITERIA

APPLICATION DATE FROM  APPLICATION DATE TO

PROCESS DATE FROM  PROCESS DATE TO

ISSUE DATE FROM  ISSUE DATE TO  ISSUED BY

REVIEW DATE FROM  REVIEW DATE TO

EXPIRE DATE FROM  EXPIRE DATE TO

INSPECTION DATE FROM  INSPECTION DATE TO

NEXT INSPECTION DATE FROM  NEXT INSPECTION DATE TO

ADDITIONAL SEARCH CRITERIA

Go Back Reset Search

If applicable, select the down arrow next to **Additional Search Criteria** on the bottom left to open the drop-down list. Select the appropriate option to open another section where you can add information about People, Organization, Property, Vehicles, or Guns.

ADDITIONAL SEARCH CRITERIA

People

People

Organization

Properties

Vehicles

Guns

Go Back Reset Search

Enter your search criteria in the applicable search fields, then select **Search**. The *Permit Search Results* page displays all search results that meet the parameters of your search.

Permit Number	Agency	Permit Info	Last Name	First Name	Role	Permit ID	Actions
	District 42, Versailles	Permit#:PARKING PERMIT;Status:DENIED;Reason:App Date:	Logitech	Mister	OTHER APPLICANT	84	
66677888	District 42, Versailles	Permit#:66677888;Type:PARKING PERMIT;Status:ORIGINAL;Reason:App Date:	Evans	Christopher	MERCHANT/BUSINESS APPLICANT	81	
66677888	District 42, Versailles	Permit#:66677888;Type:PARKING PERMIT;Status:ORIGINAL;Reason:App Date:	America	Captain	MERCHANT/BUSINESS APPLICANT	81	
66677888	District 42, Versailles	Permit#:66677888;Type:PARKING PERMIT;Status:ORIGINAL;Reason:App Date:	DOWNNS	ARTHUR	MERCHANT/BUSINESS APPLICANT	81	
66677888	District 42, Versailles	Permit#:66677888;Type:PARKING PERMIT;Status:ORIGINAL;Reason:App Date:	Bacon	Chrispy	MERCHANT/BUSINESS APPLICANT	81	

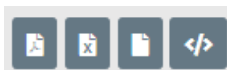
The icons in the *Actions* column display based on our role.

Select to view a permit.

Select to open a permit for editing.

Select to delete a permit.

Several actions are available from the *Permit Search Results* page. These are indicated by four icons under the *Search Results* tab:

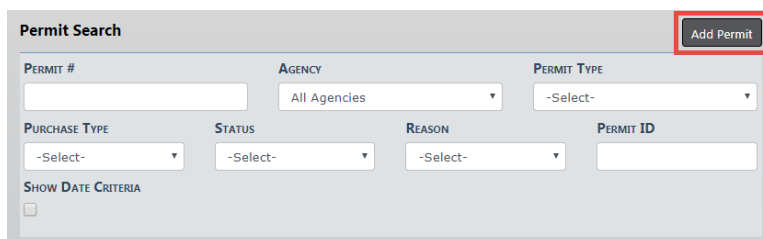


You can then export your search results into that type of document. The **Add Permit** button accesses the *Add Permits* page where you can add a new **Permit**.

## Add Permit

There are two ways to access the **Add Permit** page:

- The **Add Permit** button on the *Permit Search* page.



- The **Add Permit** button on the *Permit Search Results* page.

Permit #	Agency	Permit Info	Last Name	First Name
120	District 42, Versailles	Permit#;X;Type:BURNING PERMIT;Status:RENEWAL;Reason:APPLICANT DOES NOT MEET REQUIREMENTS;App Date:	Kid	Bill

For search details, refer to "Search Permits" on page 488.

On the *Add Permit* page complete the required fields that display a red border to the left of the field, and all other fields for which you have information.

PERMIT #  AGENCY

PERMIT TYPE  PERMIT STATUS  PERMIT REASON

PURCHASE TYPE  APPLICATION DATE

PROCESS DATE  PROCESSED BY

ISSUE DATE  ISSUED BY  EXPIRE DATE

REVIEW DATE  REVIEWED BY  NEXT REVIEW DATE

INSPECTION DATE  INSPECTED BY  NEXT INSPECTION DATE

COMMENTS

The only required fields for adding a permit are the **Permit Type** and **Status** fields, both of which have a drop-down list from which to select.

Once you have entered all the information, select **Save**, this will open the **Edit Permit** page.

## Edit Permit

To edit a permit you either must have edit permissions, or you must add and save a new permit to open the **Edit Permit** page.

**Permit Information** Go Back View Summary

PERMIT # CS12K21	AGENCY District 42, Versailles	PERMIT ID 115
PERMIT TYPE PARKING PERMIT	PERMIT STATUS RENEWAL	PERMIT REASON -Select-
PURCHASE TYPE -Select-	APPLICATION DATE 02/19/2019	
PROCESS DATE	PROCESSED BY	
ISSUE DATE	ISSUED BY	EXPIRE DATE
REVIEW DATE	REVIEWED BY	NEXT REVIEW DATE
INSPECTION DATE	INSPECTED BY	NEXT INSPECTION DATE

COMMENTS

Go Back Save

**People** + Add Person

**Organizations** + Add Organization

**Property** + Add Property

**Vehicles** + Add Vehicle

To add additional information to the permit such as, People, Organization, Property, Vehicle, Attachments you must select the appropriate **+Add** link. You will first search for the record; i.e. People.





Mug Shot Search - By Physical Description Add Person

**Person**


LAST NAME	FIRST NAME	MIDDLE NAME
TITLE	DOB	AGE
RACE	SEX	INDEX ID

Refine Search New Search Add Person Online RMS Statewide Search

Person Search Results

Last Name	First Name	Middle Name	Title	Sex	Race	DOB	SSN	Misc ID	Name Type	Index ID	Actions
Jones	Frank			M	W				Primary Name	805	 
Jones	Frank 1			M	W				Primary Name	883	 

Refine Search New Search

Use the  under the *Actions* column to select the Person.

If there are no results found during your search, use the **Add Person** button. For more information on adding a person, refer to "Adding Person" on page 85 in the *Master Indices* module.

When you make a selection the *Add Permit Person* page opens.

Add Permit Person <span style="float: right;">Update Details</span>					
LAST NAME	FIRST NAME	SEX	RACE	ETHNICITY	INDEX ID
Jones	Frank	Male	White	Unknown	805

**Additional Information**

ROLE: Select  
GOVT. APPLICANT  
GUN APPLICANT  
MERCHANT/BUSINESS APPLICANT  
OTHER APPLICANT  
PEDLER/NON-RESIDENT  
RESIDENT APPLICANT  
TAXICAB DRIVER

DATE OF INFO:

Go Back Save

The **Date Of Info** defaults to the current date. You must make a selection from the drop-down for the **Role**. After you have made your selection, select **Save**. It brings you back to the **Edit Permit** page.

Once you have added all the necessary information to the **Permit**, select the **View Summary** button to review your work on the *Permit Details* page.

If you need to add or change information in the **Permit**, do so then select **Update Details**.

If you need to go back to the previous page, select the **Go Back** button.



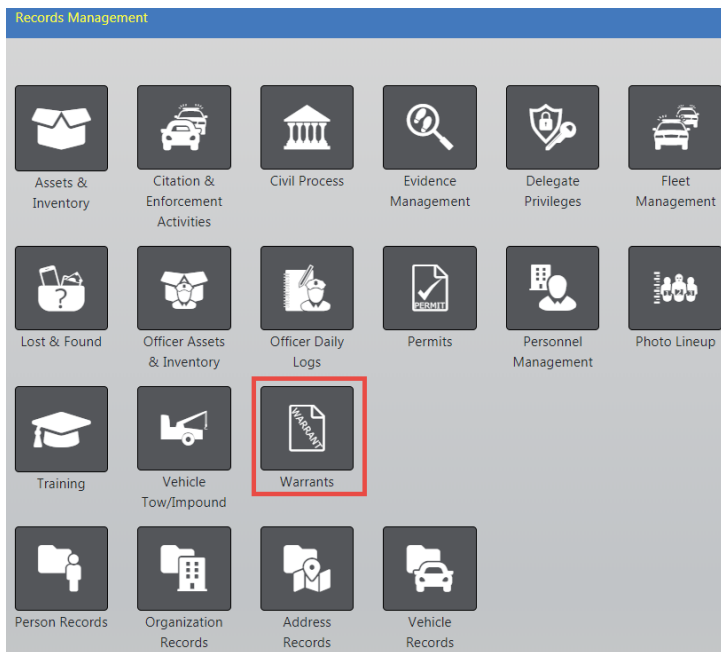
# Chapter 27. Warrants

## Warrants Overview

The **Warrants** module handles the workflow of warrants in the Online RMS system. Information entered in this module drives the process of creating, activating, serving, and/or recalling warrants. Warrant logs are maintained throughout the lifecycle of the warrant, as are notifications to users in the system regarding the **Warrant**.

To access the **Warrants** module, select the **Warrants** option from the *Records Management* drop-down menu or select the **Warrants** icon/link from the *Records Management* pages.

Or click *Records Management* on the navigation bar, click the **Records Management** option from the drop-down menu, then click the **Warrants** icon/link.



You are initially brought to the **Warrant Search** page. Caliber Public Safety recommends that you always search for a **Warrant** prior to adding a new one.

You can view the warrant delete log or add a warrant from the Warrant Search page. For more information on search warrants, refer to "Warrant Search" below.

## Warrant Search

The **Warrant Search** page allows you to search for a group of warrants or a specific warrant. You can also *View Delete Log* and *Add Warrant* from this page by clicking on the respective links on the top right of the page.



For more information on deleting a warrant, refer to "Delete Warrant" on page 518.

For more information on adding a warrant, refer to "Add Warrant" on the facing page.




On the **Warrant Search** page, complete the fields necessary to produce the desired search results. For example, enter the last name *Jackson* and first name *Mar* to display records that match that criteria.


Enter information into the **Warrant Search** page then click **Search** or press the **Enter** key, click **Reset** to clear the entered search data to start the search over, or click **Go Back** to return to the previous screen without searching.


Warrants that meet the search parameters are listed. Icons that display in the *Actions* column depend on your assigned role.

Index ID	Status	Agency	Date Issued	Served Date	Last Name	First Name	DOB	Charges	Ids	Actions
347	Served	Indiana State Police	01/17/2019 1200	02/19/2019	Jackson-Smith	Henrietta	10/20/2005		123 (Docket #)	View, Edit, Delete icons

Select the **View** icon  in the *Actions* column to view the warrant.

Select the **Edit** icon  to update the warrant. For more information refer to "Edit Warrant" on page 502.

Select the **Delete** icon  to delete the warrant. For more information refer to "Delete Warrant" on page 518.

**Note:** If there is one charge, then it appears in the Charge column; if multiple charges, an information bubble  appears. Hover over or click on the bubble for more information.

## Add Warrant

There are two ways to add a warrant from the **Warrant** module:

- Select the **Add Warrant** link from the *Warrants Search* page

- Select the **Add Warrant** button from the *Warrant Search Results* page.

Index ID	Status	Agency	Date Issued	Last Name	First Name	DOB	State ID	Actions
347	Initial	Indiana State Police	01/17/2019 1100	Jackson-Smith	Henrietta	10/20/2005		View Edit Delete

Either option will open the *Master Index Search* page. Enter the necessary criteria to search for the person for whom to apply the **Warrant**, click **Search**, then select the appropriate person record for the Warrant.

**NOTE:** If the person for whom you are searching does not exist, select the **Add Person** button on top of the *Search Results* page to add that person. Refer to "Adding Person" on page 85 for instructions. After you have added the person to the Master Index, you can then select the record to add a warrant for that person.

For more information on the *Master Index*, refer to "Master Indices" on page 71.

When you select the appropriate person record, the **Add Warrant** page opens. The person data populates from the *Master Person Index* record automatically.

**Person Information**
View Person Details Update Person

LAST NAME	FIRST NAME	MIDDLE NAME	DOB	SEX	RACE	
Jackson-Smith	Henrietta	Francine	10/20/2005 (Age: 13) <b>JUVENILE</b>	Female	White	
ETHNICITY	DRIVER'S LICENSE #	DRIVER'S LICENSE STATE	SSN			(1/2) 01/17/2019
Hispanic or Latino	CO1234545	Colorado	111-11-1111			
<b>ALIASES</b>						
JS (Alias), Henry (Alias), HEYHEY Framk(Nickname)						
RESIDENCE PHONE	CELL PHONE	E-MAIL	ADDRESS (RESIDENCE)			
(111)-111-1111	(222)-222-2222	email@work.com	456 Main STCT Apartment #100 Littleton, CA 12345			
HEIGHT	WEIGHT	EYE COLOR	HAIR COLOR	COMPLEXION	PLACE OF BIRTH	
5' 02"	120	Black	Black	Sallow	United States of America	
CITIZENSHIP	GANGS		EMPLOYER NAME	SCHOOL		
United States of America	Automation Boys(Inactive)		All Blacks Rugby	A School (No Yrs: 1)		
CAUTION CODES:			INDEX ID			
<b>Escape Risk, Illegal Alien</b>			1125			
<b>SELECT AN ALIAS</b>						
Henrietta Francine Jackson-Smith - (10/20/2005) - Primary Name						

**Warrant**

WARRANT TYPE	AGENCY	RECEIVED DATE	STATUS
<span style="border: 2px solid red; padding: 2px;">-Select-</span>	Indiana State Police	<input type="text"/>	Initial
ISSUING COURT	PLAINTIFF	ISSUE DATE	ISSUE TIME
SELECT COURT	STATE	<input type="text"/>	<input type="text"/>
<span style="border: 2px solid red; padding: 2px;">-Select-</span>	The People of the State of Maryland	<input type="text"/>	<input type="text"/>
JUDGE	PLAINTIFF	STATE	
<input type="text"/>	The People of the State of Maryland	Indiana	

You may *View Person Summary* data or *Update Person Details* by clicking on the links provided.

Complete all required fields that display a red border to the left of the field, and all other fields required by your Agency.

At least one Reference Number is required. Type the number in the field, choose the Reference Type and select the **Add** button. Add additional Reference Numbers and Types as needed.

Check **Extraditable Offense** box if extraditable, and enter an **Extra Comment**, if applicable.

Click **Save** to open the *Edit Warrant* page.

Page down and assign officers, if applicable.

**Officers**

+ Assign Officer

Select **Assign Officer** to open the officer dialog box and grid. You can assign officers inside or outside your agency.

Go Back

**AGENCY FILTER**

My Agency  My Organization

All Agencies








**OFFICER FILTER**

All  Detectives  Patrol

**OPTIONAL SEARCH TEXT**

Optional -Search By- ▼

Search


Officer Name	Title	Agency	Date Last Assigned	Active Warrants Assigned	Actions
Brandon Pangle		District 42, Versailles	09/30/2020	0	
Charles Livingwell		District 42, Versailles	09/30/2020	0	
Ralphie (off) Lauren	Supervisor	District 42, Versailles	10/05/2018	0	
A B		District 42, Versailles		0	
Todd Simpson	SERGEANT-CAPTAIN-WIN	District 42, Versailles		0	
Christine Saur1		District 42, Versailles		0	
Christine Saur		District 42, Versailles		0	

Select one **Agency Filter**. If you choose to filter *by My Organization* or *All Agencies*, a drop-down list appears of available agencies from which to choose.

Select one **Officer Filter**.

You can use the **Optional Search Text** fields filter by a specific officer name, badge number, or title.

Click the **Search** button to filter the results list based on all selections made above.

Select  an officer from the list to open another dialog box with additional information.

Officer Name	Title	Badge #	Date Last Assigned	Active Warrant Assignments
Christine Saur		SAUR111		0

**ASSIGN DATE**  
11/12/2020 1548

**COMMENTS**  
This is a text Warrant.

**NOTIFY USER**

Save

Select the **Assign Date** if other than the default.

Enter **Comments**, if appropriate.

Check **Notify User** if you want to notify the user of the assignment.

Click **Save** to add the officer assignment to the Warrant.

Optionally, assign additional officers.

Add associated **Incidents** and **Calls For Service**, if applicable.

Incidents	+ Add Incident
Calls For Service	+ Add Call

### Add Incident

Select the **Add Incident** link to search for and select an existing incident to associate to the Warrant.

If the selected Incident has associated *Calls For Service*, a list of those Calls appear and you may choose whether or not to also associate the *Calls For Service* to the warrant.

### Add Call

Select the **Add Call** link to search for and select an existing Calls to associate to the Warrant.

Complete the *Warrant Charge* section. Select the **Charge Category** and **Charge Class**, then the **Warrant Charge**.

Within the Warrant Charge field, search for arrest charges and statutes by entering numbers or text to display a list from which to choose.


**NOTE:** The **Warrant Charge** displays a list based on data entered into the **Charge Category** and **Charge Class** fields.

Enter the **Charging Agency** section, if applicable.

Enter all other applicable information.

Click **Save** to add the Warrant.

## Edit Warrant

From the *Warrant Search Results* page, select the Edit icon  icon in the *Actions* column of the Warrant you want to edit. For more information on searching for a warrant, refer to "Warrant Search" on page 496.


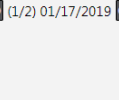
The *Edit Warrant* page appears.

[Go Back](#) [Delete](#) [Duplicate](#) [Activate](#) [Print](#) [Comment](#) [Serve Warrant](#) [Save](#)

[Warrant Information](#) | [Warrant Log](#) | [Attachments](#)

WARNING - Active Cautions Found

**Person Information** [View Person Summary](#) [Update Details](#)

LAST NAME	FIRST NAME	MIDDLE NAME	DOB	SEX	RACE	
Jackson-Smith	Henrietta	Francine	10/20/2005 (Age: 14) <b>JUVENILE</b>	Female	White	
ETHNICITY	DRIVER'S LICENSE #	DRIVER'S LICENSE STATE	SSN			
Hispanic or Latino	CO1234545	Colorado	111-11-1111			
ALIASES JS (Alias), Henry (Alias), HEYHEY Frank(Nickname)						
RESIDENCE PHONE	CELL PHONE	E-MAIL	ADDRESS (RESIDENCE)			
(111)-111-1111	(222)-222-2222	email@work.com	456 Main STCT Apartment #100 Littleton, CA 12345			
HEIGHT	WEIGHT	EYE COLOR	HAIR COLOR	COMPLEXION	PLACE OF BIRTH	
5' 02"	120	Black	Black	Sallow	United States of America	
CITIZENSHIP	GANGS		EMPLOYER NAME	SCHOOL		
United States of America	Automation Boys(Inactive)		All Blacks Rugby	A School (No Yrs: 1)		
CAUTION CODES:			INDEX ID			
<b>Escape Risk, Illegal Alien</b>			1125			

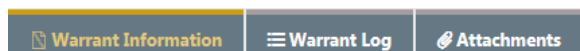
The *Edit Warrant* page contains up to eight action buttons on the top right of the window:

[Go Back](#) [Delete](#) [Duplicate](#) [Activate](#) [Print](#) [Comment](#) [Serve Warrant](#) [Save](#)

- **Go Back** returns to the previous page.
- **Delete** a warrant, refer to "Delete Warrant" on page 518.
- **Duplicate** a warrant, refer to "Duplicate Warrant" on page 507.
- **Activate** a warrant from initial status, refer to "Activate Warrant" on page 509.
- **Print** a warrant, refer to "Print Warrant Report" on page 517.
- Log a **Comment**, refer to "Warrant Log" on page 514.
- To **Serve Warrant**, refer to "Serve Warrant" on page 511.
- **Save** applies your updates to the database.

**Note:** The appearance of the action buttons are controlled by the warrant Status. For example, the Serve Warrant button does not appear when the warrant status is Served.

The *Edit Warrant* page contains three tabs:



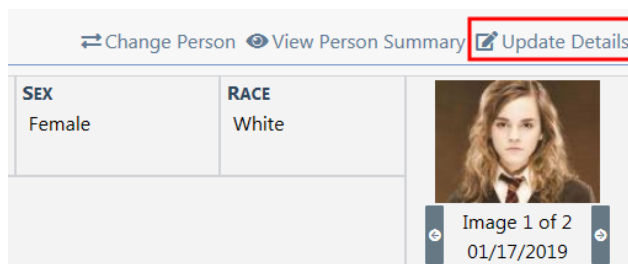
- For information on the Warrant Information tab, refer to "Warrant Information Tab" below.
- For information on the Warrant Log tab, refer to "Warrant Log Tab" on page 506.
- For information on the Attachments tab, refer to "Attachments Tab" on page 507.

## Warrant Information Tab

The **Edit Warrant** window opens to the Warrant Information tab by default. For information on **Warrant Log** refer to "Warrant Log" on page 514, and for information on **Warrant Attachments** tab refer to "Warrant Attachments" on page 516.

### Choose or Add Alias Name

Select the down arrow to the right of the **Select an Alias** field to choose another name from the drop down list. If there are no names to choose from and you need to add an Alias, select the **Update Details** link in the upper right corner to open the *Person Details* page.





Person Details

Go Back Visualization Tool Create Photo Lineup View Summary Subscribe

JUVENILE

Image 1 of 2  
01/17/2019

INDEX ID  
1125

LAST NAME	FIRST NAME	MIDDLE NAME
Jackson-Smith	Henrietta	Francine

TITLE  
I

DOB  
10/20/2005

SSN  
111-11-1111

SEX  
Female

RACE  
White

ETHNICITY  
Hispanic or Latino

DRIVERS LICENSE  
CO1234545

DRIVERS LICENSE STATE  
Colorado

RESIDENCE PHONE  
111 - 111 - 1111

CELL PHONE  
222 - 222 - 2222

RESIDENCE ADDRESS  
456 Main STCT Apartment #100 Littleton, CA  
12345

Go Back Save

There are two ways to add an alias:

- Click into the **Add** field on the *Person Detail* window and select **Aliases** from the drop-down list.
- Or scroll down to the *Aliases* section of the *Person Detail* window and click **Add Alias**.

Either method will open the *Alias* window.

Alias

NAME TYPE  
Alias

FIRST NAME  
JS

MIDDLE NAME

LAST NAME

TITLE  
-Select-

DOB

SSN

DATE OF INFO  
02/11/2019

Cancel Save

Complete the fields and select **Save**.

Click **Go Back** to return to the **Edit Warrant** window and page down to the **Select An Alias** section. The new Alias you entered now appears in the drop-down list.



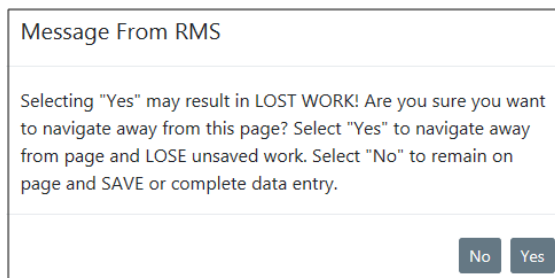
Page down on the *Edit Warrant* screen for other associated data, such as Service Addresses, Warrant Information, Incidents, Calls, Officers, Field Arrests, Charges, and Charging Agency information. You can view, update, add, or delete associated data if you have been given access to do so. For more information on the type of access that you have, see your administrator.

To add an associated record, click on the link that contains a + sign and a new window will open.

To return to the previous screen, select **Go Back**.

To add a comment about the warrant, select **Comment**.

If you have not selected **Save** and you have made some updates to the Warrant, an unsaved data warning message displays.



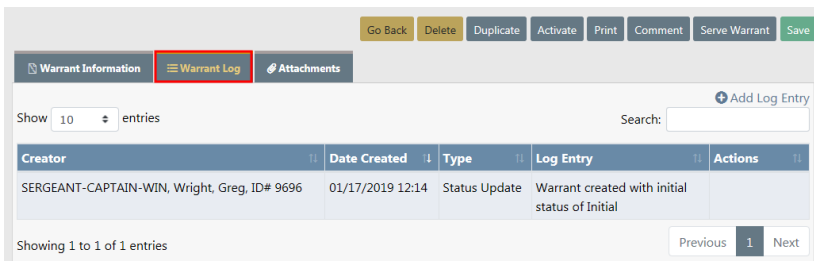
You may want to select **No**, select **Save** then continue with **Comment**.

The **Event Date** defaults to the current date and time. Enter any comments to the Warrant.

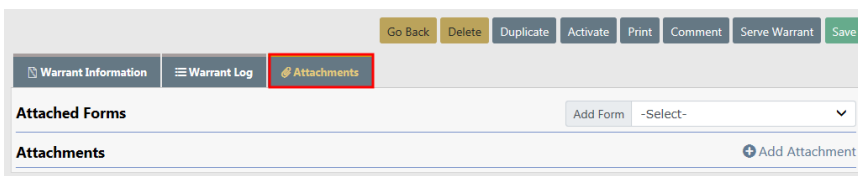
## Warrant Log Tab

Select **Warrant Log** to view or add comments. This is also where you can view the date/-time of each action taken.

Refer to "Warrant Log" on page 514 for more information.




## Attachments Tab



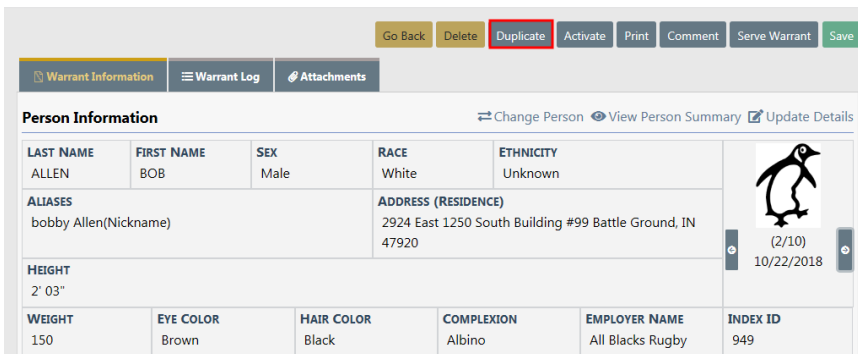
Refer to "Warrant Attachments" on page 516 for more information.

## Duplicate Warrant

Users with proper permissions can duplicate warrants. For more information on permissions, refer to your system administrator.

From the *Warrant Search Results* page, select the Edit icon  icon in the *Actions* column of the Warrant you want to delete. For more information on searching for a warrant, refer to "Warrant Search" on page 496.

The *Edit Warrant* page appears.



Click on the **Duplicate** button at the top of the page to select items to duplicate.

Click the **Add Original Person** button to add the person on the original warrant, or click **Add Person** to add a different person.

If you clicked **Add Person**, the person search window appears. Search for and select the person to add them to the duplicate warrant. Repeat as needed until all names have been added.

In addition to core warrant data, select the available options to duplicate.


Click the **Duplicate** button to display a confirmation window.


Click **Yes** to duplicate, or click **No** to close the window without duplicating.

If you clicked **Yes**, a *Warrant Successfully Duplicated* window appears listing any errors that may have occurred.

[Back To Original Warrant](#)


Warrant Successfully Duplicated. Each duplicated warrant will appear below. Should any errors have occurred, they will be listed below too.

Warrant Index Id #	Person	Errors	Actions
350	<b>Name:</b> Ken Aaberg <b>Sex:</b> Female <b>Race:</b> Middle Eastern <b>DOB:</b> 07/09/1975 (Age:43)	No Errors	

Click **Back to Original Warrant**, or click the edit icon  in the actions column to edit the duplicated warrant.

## Activate Warrant

Users with proper permissions can activate warrants from an *Initial Status*. For more information on permissions, refer to your system administrator.


From the *Warrant Search Results* page, select the Edit icon  icon in the *Actions* column of the Warrant you want to delete. For more information on searching for a warrant, refer to "Warrant Search" on page 496.

The *Edit Warrant* page appears. Click on the **Activate** button at the top of the page.

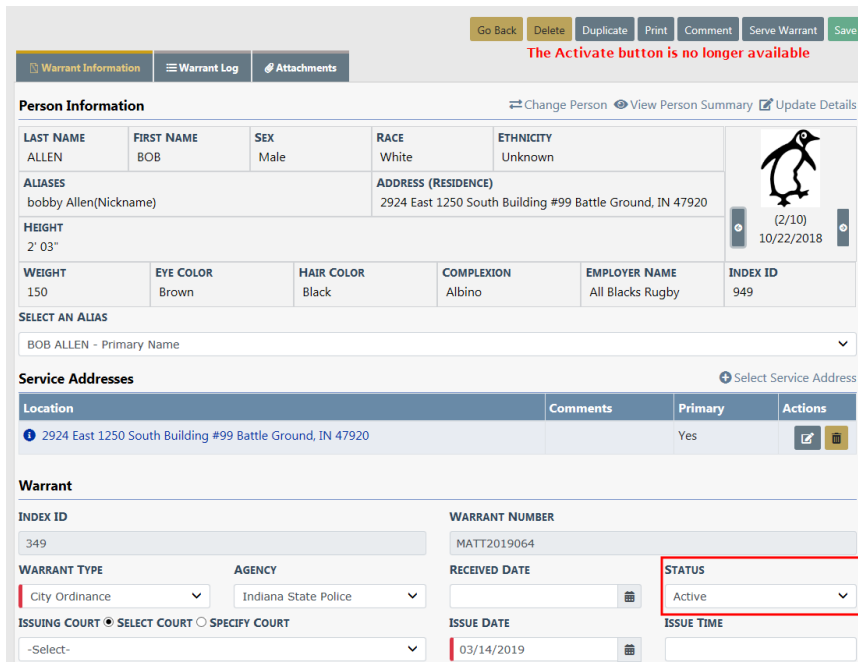
[Go Back](#) [Delete](#) [Duplicate](#) [Activate](#) [Print](#) [Comment](#) [Serve Warrant](#) [Save](#)

[Warrant Information](#) | [Warrant Log](#) | [Attachments](#)


**Person Information** [Change Person](#) [View Person Summary](#) [Update Details](#)

LAST NAME ALLEN	FIRST NAME BOB	SEX Male	RACE White	ETHNICITY Unknown	 (2/10) 10/22/2018
ALIASES bobby Allen(Nickname)		ADDRESS (RESIDENCE) 2924 East 1250 South Building #99 Battle Ground, IN 47920			
HEIGHT 2' 03"					
WEIGHT 150	EYE COLOR Brown	HAIR COLOR Black	COMPLEXION Albino	EMPLOYER NAME All Blacks Rugby	INDEX ID 949

A *Warrant Successfully Activated and Updated* message briefly appears across the top of the page. The **Activate** button no longer appears at the top of the page, and the warrant **Status** changed from *Initial* to *Active*.



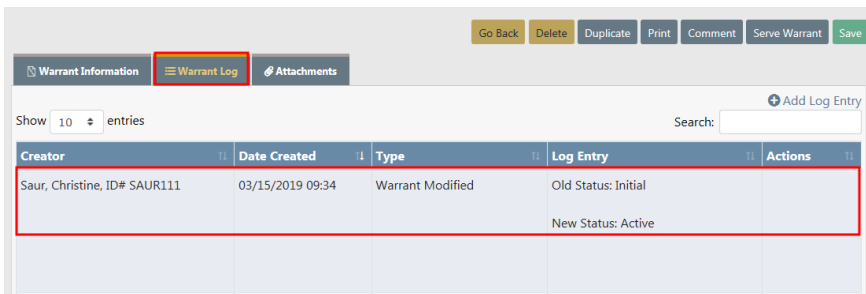
When the warrant is *Active*, an automatic Caution Flag appears on the master person index record:



For more information on master index records, refer to "Master Indices Overview" on page 71.


**NOTE:** When the warrant **Status** changes from *Active*, the Caution Flag is removed from the master person index record automatically.

The change in status also posted to the Warrant Log. Click on the **Warrant Log** tab to view the entry. For more information about log entries, refer to "Warrant Log" on page 514.

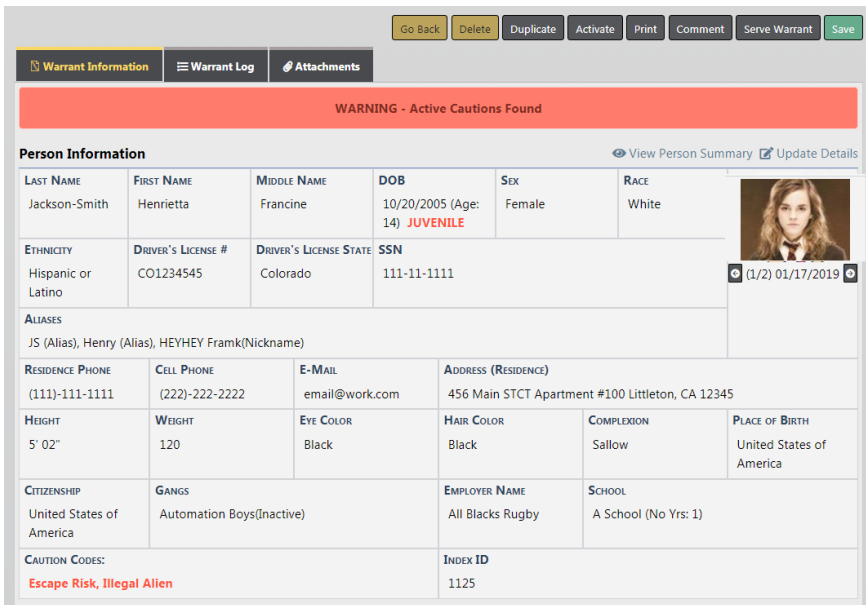


Apply other necessary updates to the warrant as needed, then click **Save**. For more information on editing the warrant, refer to "Edit Warrant" on page 502.

## Serve Warrant

From the *Warrant Search Results* page, select the Edit icon  icon in the *Actions* column of the Warrant you want to edit. For more information on searching for a warrant, refer to "Warrant Search" on page 496.

The *Edit Warrant* page appears.



From the *Edit Warrant* page select the **Serve Warrant** button at the top right or bottom of the page to display the *Serve Warrant* page.

Serve Warrant

---

**SERVING OFFICER**  
Christine Saur(Badge #: SAUR111) - District 42, Versailles

**DATE / TIME SERVED**  
03/14/2019 1545

**COMMENTS**  
Warrant updated with status of served.

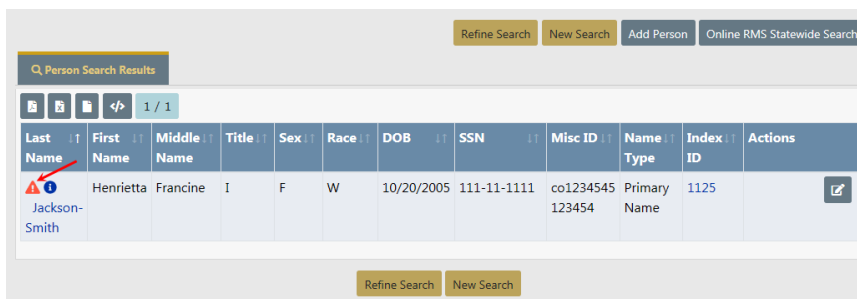
Cancel Serve



The **Date/Time Served** field defaults to the current date and time, and the **Comment** field defaults to *Warrant updated with status of served*. You can change these values as needed.


Once you have verified the information on the *Serve Warrant* page, select **Save** to save the record. The status of the Warrant is now *Served*.

When using *Master Indices Person Search*, there will be a red triangle icon to the left of the Last Name on the *Person Search Results* page when a person has an active Warrant.

**NOTE:** For more information on Master Indices, refer to "Master Indices" on page 71.



Last Name	First Name	Middle Name	Title	Sex	Race	DOB	SSN	Misc ID	Name Type	Index ID	Actions
 Jackson-Smith	Henrietta	Francine	I	F	W	10/20/2005	111-11-1111	co1234545 123454	Primary Name	1125	

From the *Person Search Results* page select the Edit icon  to open the *Edit Person* page. An *Active Warrants Found* message appears in red on the Person Details screen.

**WARNING - Active Warrants Found**



Click on the *Active Warrants Found* message to open the *Person Summary* tab to the **Involved Warrants** section that displays the active warrant in red.

Involved Warrants					
Index ID	Agency	Status	References	Charges	Date Issued
281	Indiana State Police	<b>Active</b>	<a href="#">i</a>		06/23/2016
267	All Other	Pending Service	<a href="#">i</a>		04/13/2016
233	Indiana State Police	Served	<a href="#">i</a>	<a href="#">i</a>	04/15/2015

**NOTE:** You can also go directly to the **Involved Warrants** section from the **Total Involvements** summary section at the *Person Summary* tab. Click on the number to the right of the Warrants line item.

[Go Back](#) [Visualization Tool](#) [Create Photo Lineup](#) [View Summary](#) [Subscribe](#)

Person Details

Person Summary

**Total Involvements**

Incidents	11/20/2018	83
Served Warrants	04/15/2015	12
FieldArrest	10/31/2018	88
Permits		1
Citations	05/30/2017	2
CourtPapers	11/12/2018	17
CustomForms	09/26/2018	9
CallsForService	09/14/2018	1

**User Subscriptions**

Access	1
Associate	1
Update	2

**Incident By Role**

Arrestee	10
Offender	58
Victim	21
Other	4

**By Offense Category**

Property	30
Person	21
Vehicle	24
Society	10
Drug	8

**Common Event Associations**

Address	74
Gang	63
Organization	20
Person	106
Property	9
Vehicle	22

**By Incident Status**

Initial Report	48
Approved Report	35

Select the **Index ID** to the left of the *Active Warrant* to open the *View Warrant* screen.

[Go Back](#) [Print](#) [Comment](#) [Serve Warrant](#)

Warrant Information

Warrant Log

Attachments

⚠ **WARNING - Active Cautions Found**

Person Information

[View Person Summary](#)

Select the **Serve Warrant** button to open the *Serve Warrant* window.

Serve Warrant

**SERVING OFFICER**  
 Christine Saur(Badge #: SAUR111) - District 42, Versailles

**DATE / TIME SERVED**  
 03/14/2019 1545

**COMMENTS**  
 Warrant updated with status of served.

Enter the **Serving Officer**. The **Date Served** fields default to the current date and time and the **Comments** field defaults to *Warrant updated with status of served*. You can change these values as needed.

Once you have verified the information on the *Serve Warrant* page, select **Save** to save the record, close it, and return to the Warrant Information section of the *Edit Warrant* page, where the status now shows **Served**.

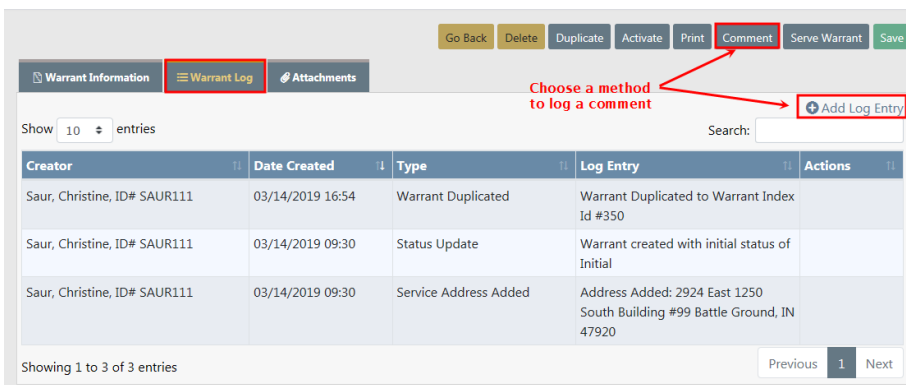
Warrant Information			
INDEX ID 281	WARRANT #		
WARRANT TYPE Arrest Warrant	AGENCY Indiana State Police	RECEIVED DATE	STATUS Served
ISSUING COURT		ISSUE DATE 06/23/2016 11:12	
JUDGE	PLAINTIFF The People of the State of Maryland	STATE Indiana	
BOND TYPE	BOND AMOUNT \$0.00	EXPIRATION DATE	REVIEW DATE

## Warrant Log

Warrant activity is systematically logged for tracking purposes, and you have the ability to manually create a log entry.

A log entry is created automatically when the warrant is created, updated, deleted, etc. Each entry captures the user's name, date, type of change, and comments.

The **Warrant Log** tab is accessible through the *Edit Warrant* page. For more information, refer to "Edit Warrant" on page 502.



You can perform a **Search** for log entries containing a specific character string. Type the text in the **Search** text box on the upper right of the window to filter the results in the grid that matches the text you type.

You can log your own comments one of two ways:

- Click on the **Comment** action button on the top of the page.
- Or click on the **Add Log Entry** hyperlink.

Click on the method of your choice to display the **Add Log** form. Required fields display a red border to the left of the field. Select the *Notify Warrant Agency* button to notify the Warrant Agency, or select other individual users or assigned officers.

The 'Add Log' form contains the following fields and options: 'LOG DATE' (03/14/2019 1550), 'ACTION TYPE' (-Select-), 'COMMENT' (a large text area with a red border on the left), 'NOTIFY WARRANT AGENCY' (checkbox), 'NOTIFY OTHER USERS' (text input with a dropdown arrow), 'SELECTED USERS' (text input with 'Double Click to Remove' text), and 'Cancel' and 'Save' buttons at the bottom.

The **Log Date** defaults to the current date and time but can be changed.

Click **Save** to post the log.

To provide real-time awareness, an email is sent to the identified recipients notifying them of the new **Warrant Log**, and the officers and selected users receive an Online RMS *Notification*. For more information on *Notifications* refer to "Notifications" on page 21.

<b>TYPE</b> WARRANT LOG	<b>PRIORITY</b> High
<b>SENDER</b> Simpson Homer	<b>SENT ON</b> 11/14/2018 02:39 PM CST
<b>DESCRIPTION</b> Warrant Id: 343; Person: Dobie Waterman; Warrant Type: Criminal Warrant; Warrant Status: Served; Log Type: Comment; Log Date: 11/14/2018 14:39; Comment: new comment Event Date: 11/14/2018 14:39 Notified Users: [Tester 123, Greg Wright] Notified Roles: (Indiana State Police) [LEA_CLERK]	

Delete Go Back Take Action

## Warrant Attachments

There may be times when it is necessary to attach a copy of the *Warrant* or any other documentation to the warrant within Online RMS.

Access the **Attachments** tab from the *Edit Warrant* page.

The screenshot shows the 'Attachments' tab selected in a navigation menu. Above the menu are buttons for 'Go Back', 'Delete', 'Duplicate', 'Print', 'Comment', and 'Save'. Below the menu is a section for 'Attached Forms' with an 'Add Form' button and a dropdown menu. Below that is an 'Attachments' section with an 'Add Attachment' button.

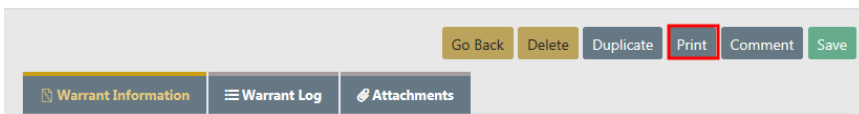
Select the **Add Attachments** link to open the *Add Attachment* page.

The screenshot shows the 'Add Attachment' page. It features a 'Go Back' button in the top right, an 'Instructions' button in the top left, and a 'Start Upload' button in the top right. The main area is a large white box with the text 'Drop Files Here, Or Click Here to Add Files'.

For details on adding Attachments refer to "Add Attachments" on page 59.

# Print Warrant Report

**Warrant Reports** are printed from the *View Warrant* or *Edit Warrant* page by clicking on the **Print** button at the top of the page. You also have the option to select whether or not to include *PDF Attachments* and *Warrant Logs* in the **Warrant Report**.



1. Check all options that apply, then click **Print**.

Warrant Print Options

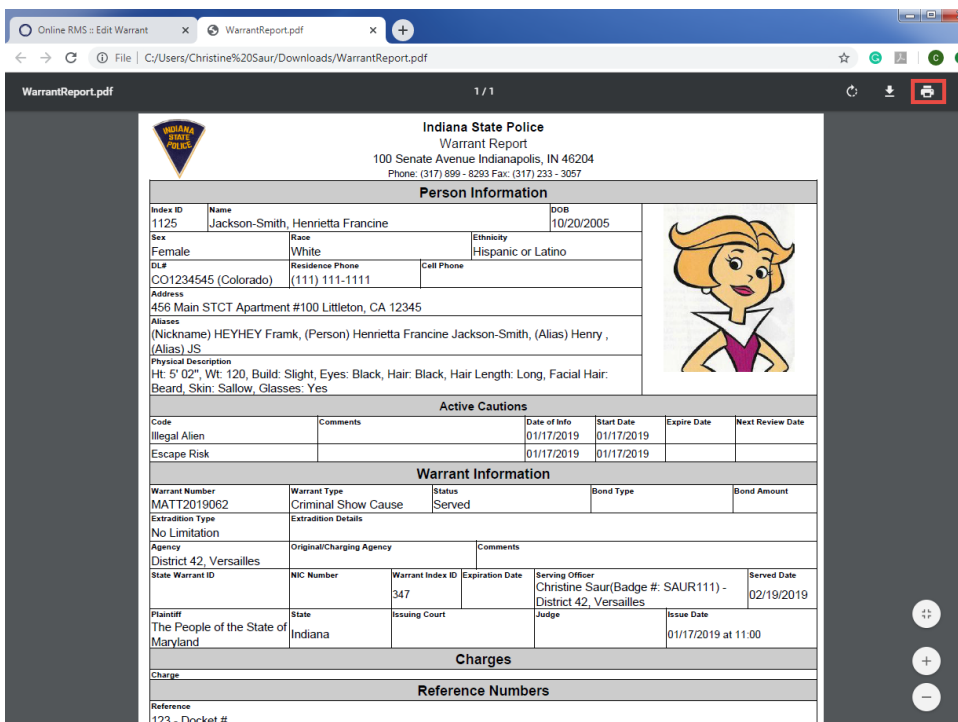
Please select what information you would like to Print.

**WARRANT REPORT**       **PERSON DETAILS REPORT**

**LOGS**

Cancel Print

2. A PDF file downloads to your machine.
3. Click on the file to open the PDF in a new tab.




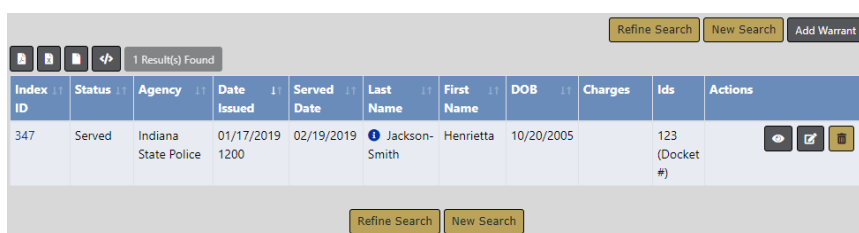
4. Click on the **Print** icon to print.
5. Click the **X** on the tab heading to close the tab.




## Delete Warrant

Users with proper permissions can delete warrants. For more information on permissions, refer to your system administrator.

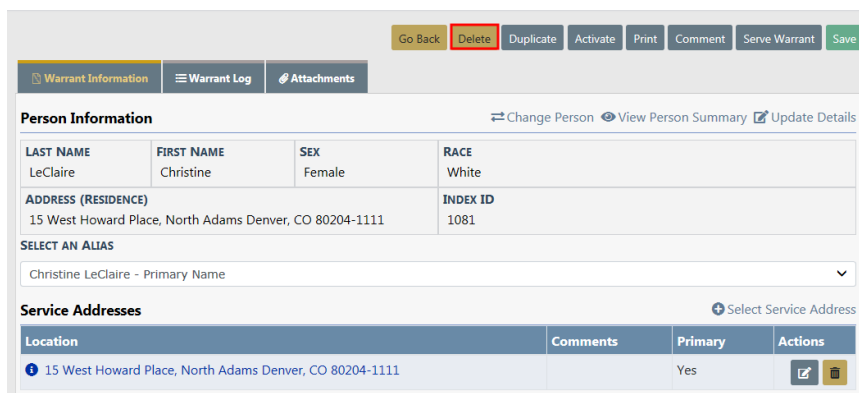
There are two ways to delete a warrant:

- From the *Warrant Search Results* page, click the **Delete** icon  in the *Actions* column. For more information on searching for a warrant, refer to "Warrant Search" on page 496.



Index ID	Status	Agency	Date Issued	Served Date	Last Name	First Name	DOB	Charges	Ids	Actions
347	Served	Indiana State Police	01/17/2019 1200	02/19/2019	Jackson-Smith	Henrietta	10/20/2005		123 (Docket #)	  

- From the *Edit Warrant* page, click on the **Delete** button at the top of the page. For more information on editing a warrant, refer to "Edit Warrant" on page 502.



Go Back **Delete** Duplicate Activate Print Comment Serve Warrant Save

Warrant Information Warrant Log Attachments




**Person Information** [Change Person](#) [View Person Summary](#) [Update Details](#)

LAST NAME	FIRST NAME	SEX	RACE
LeClaire	Christine	Female	White

**ADDRESS (RESIDENCE)** **INDEX ID**  
15 West Howard Place, North Adams Denver, CO 80204-1111 1081

**SELECT AN ALIAS**  
Christine LeClaire - Primary Name

**Service Addresses** [+ Select Service Address](#)

Location	Comments	Primary	Actions
 15 West Howard Place, North Adams Denver, CO 80204-1111		Yes	 

Whichever method you use, a *Delete Warrant* window appears.

Enter your **Delete Comment** then click the **Delete** button.

A *Warrant Successfully Deleted* message briefly appears across the top of the window, and a warrant delete log entry is created automatically with the deleted date, the user who deleted the warrant, comments, and other information. For instructions on accessing the Warrant Delete Log, refer to "View Warrant Delete Log" below.

## View Warrant Delete Log

The Warrant Delete Log is accessed through the *Warrant Search* page. Click on the **View Delete Log** hyperlink to open the *Warrant Delete Search* page. For more information on how to access the *Warrant Search* page, refer to "Warrant Search" on page 496.

Enter search criteria then click **Search** to display a results list. This is useful when searching for a specific person, warrant type, etc., as the delete log can get quite lengthy over time. To display all entries, click **Search** without entering criteria.

LAST NAME: alexander

FIRST NAME: [Empty]

AGENCY: All Agencies

WARRANT TYPE: -Select-

WARRANT INDEX ID: [Empty]

STATE WARRANT ID: [Empty]

REFERENCE #: [Empty]

REFERENCE TYPE: -Select-

DELETED DATE FROM: [Empty]

DELETED DATE TO: [Empty]

DELETED BY: [Empty]

Go Back Reset Search

Export results to different file types

Warrant Index ID	Status	Issuing Agency	Last Name	First Name	Deletion Comment	Deleted By	Deleted Date
25	Expired	District 21, Toll Road - Sc	ALEXANDER	KAREN		Lauren, Ralph J	11/04/2014
11	Served	Indiana State Police	ALEXANDER	KAREN		Simpson, Homer	03/27/2015

You can export the results to PDF, Excel, CSV, or XML formats by clicking on one of the icons above the Warrant Index ID column. Hover your mouse over the icon to view the file format.

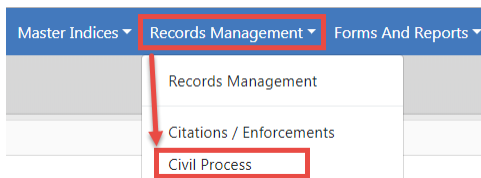


# Chapter 28. Civil Process

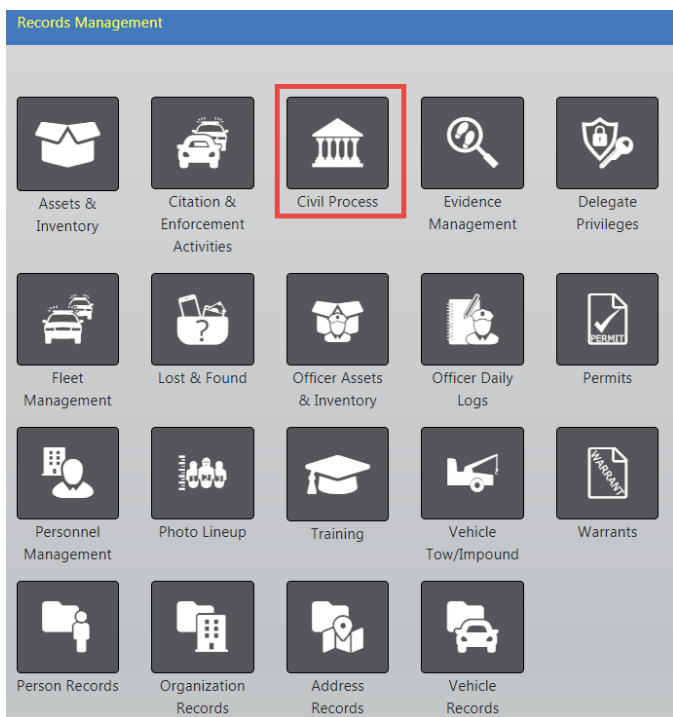
## Overview

The Civil Process application is found within the *Records Management* section. Click on Records Management You can hover over the tab and drag and drop or you can hard click on the tab and screen will open as it looks below.

To access the **Civil Process** module, select the **Civil Process** option from the *Records Management* drop-down menu.



Or, select the **Civil Process** icon/link from the *Records Management* pages.



When you click on **Civil Process** you are first taken to a *Search* page section within **Civil Process**. Searching this module is done similar to other areas within Online RMS.

**NOTE:** The terms *Court Paper* and *Civil Progress* used throughout this chapter are synonymous with each other.

## Court Paper

### Search

The search feature allows you to search upon any of the standard fields and additional criteria fields to generate the information you are seeking. Just like with our other search areas those results can then be exported out as reports to manage the data.

The screenshot shows the 'Court Paper Search' interface. At the top right, there are buttons for 'View Delete Log' and 'Add Court Paper'. The main search area is divided into several sections:

- COURT PAPER TYPE:** A dropdown menu with '-Select-'.
- STATUS:** A dropdown menu with '-Select-'.
- AGENCY:** A dropdown menu with 'All Agencies' and a user icon.
- ISSUING COUNTY:** A dropdown menu with '-Select-'.
- ISSUING STATE:** A dropdown menu with '-Select-'.
- REFERENCE TYPE:** A dropdown menu with '-Select-'.
- REFERENCE #:** A text input field.
- PLAINTIFF:** A text input field.
- COURT PAPER ID:** A text input field.
- FILED DATE FROM:** A date input field with a calendar icon.
- FILED DATE TO:** A date input field with a calendar icon.
- RECEIVED DATE FROM:** A date input field with a calendar icon.
- RECEIVED DATE TO:** A date input field with a calendar icon.
- COURT APPEARANCE DATE FROM:** A date input field with a calendar icon.
- COURT APPEARANCE DATE TO:** A date input field with a calendar icon.
- SERVICE EXPIRATION DATE FROM:** A date input field with a calendar icon.
- SERVICE EXPIRATION DATE TO:** A date input field with a calendar icon.

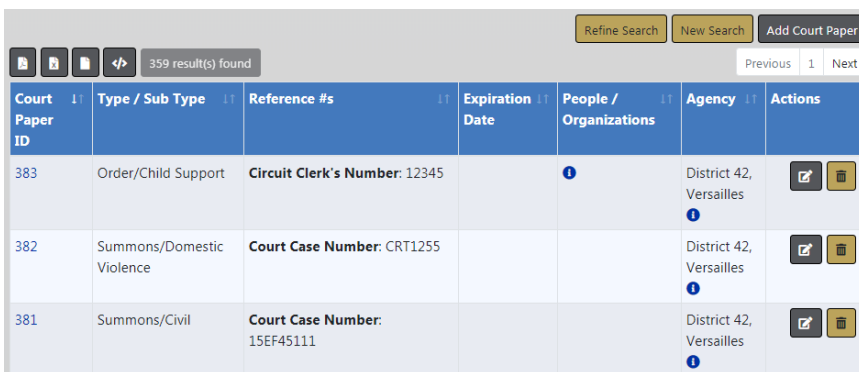
Below these fields is the 'ADDITIONAL SEARCH CRITERIA' section, which has a dropdown menu currently expanded to show the following options:

- Select-
- Select-
- Person
- Organization
- Court Location
- Received From Agency
- Officers
- Service Address
- Fee Collections
- Custom Fields

At the bottom of the search area are three buttons: 'Go Back', 'Reset', and 'Search'.


Click into the **Additional Search Criteria** field to search on other fields. This is where you are able to search by Person, organization, officer, etc. The more information you provide in the search, the narrower the search results.

The results of the search criteria from above are displayed below with all matching data.



A screenshot of a search results interface. At the top right, there are buttons for 'Refine Search', 'New Search', and 'Add Court Paper'. Below these is a search bar showing '359 result(s) found' and navigation links for 'Previous', '1', and 'Next'. The main content is a table with the following columns: 'Court Paper ID', 'Type / Sub Type', 'Reference #', 'Expiration Date', 'People / Organizations', 'Agency', and 'Actions'. Three rows are visible, each with an 'Edit' icon and a 'Delete' icon in the 'Actions' column.

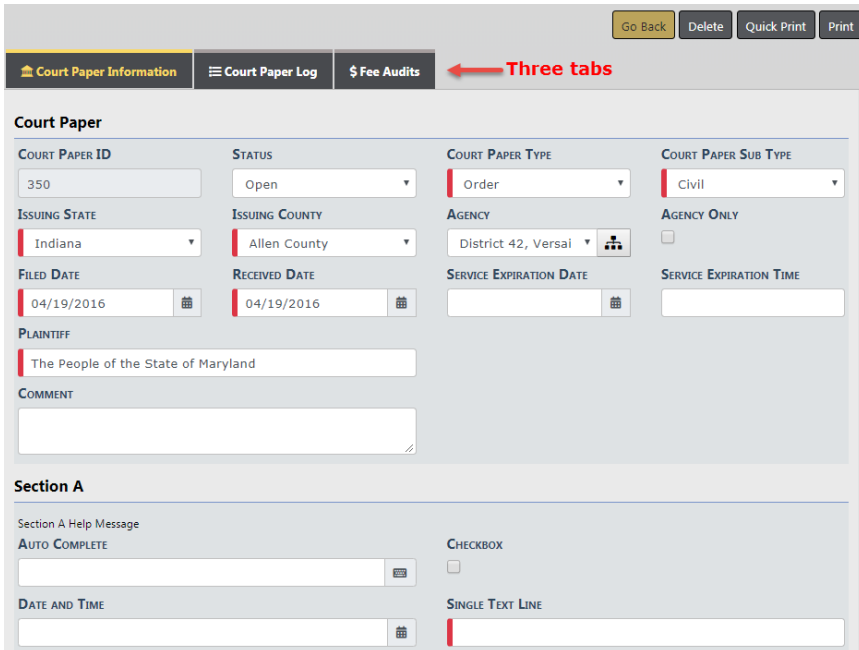
Court Paper ID	Type / Sub Type	Reference #	Expiration Date	People / Organizations	Agency	Actions
383	Order/Child Support	Circuit Clerk's Number: 12345			District 42, Versailles	
382	Summons/Domestic Violence	Court Case Number: CRT1255			District 42, Versailles	
381	Summons/Civil	Court Case Number: 15EF45111			District 42, Versailles	

From this screen you can now access the record you want by using the **Edit** icon  on the right to make changes or update information. Click on the **Court Paper ID#** to enter the **View** mode for that particular court paper.

In **View** mode, you can see information about the paper as it was entered, add and view entries made in the log for service of the paper, and track incurred fees. This allows for tracking of changes, updates and service attempts.

There are three tabs: *Court Paper Information*, *Court Paper Log*, and *\$ Fee Audits*.

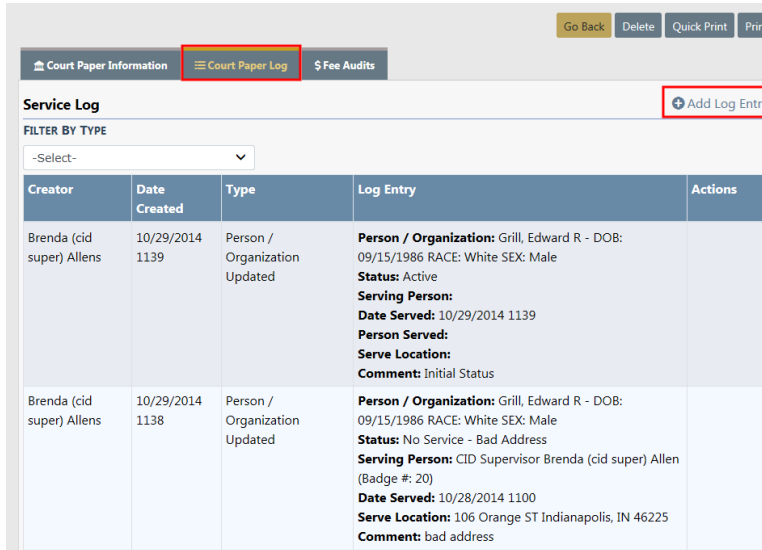
The *Court Paper Information* tab opens by default.



A screenshot of the 'Court Paper Information' form. At the top right, there are buttons for 'Go Back', 'Delete', 'Quick Print', and 'Print'. Below these are three tabs: 'Court Paper Information', 'Court Paper Log', and '\$ Fee Audits'. A red arrow points to these tabs with the text 'Three tabs'. The form contains several fields: 'COURT PAPER ID' (350), 'STATUS' (Open), 'COURT PAPER TYPE' (Order), 'COURT PAPER SUB TYPE' (Civil), 'ISSUING STATE' (Indiana), 'ISSUING COUNTY' (Allen County), 'AGENCY' (District 42, Versal), 'AGENCY ONLY' (checkbox), 'FILED DATE' (04/19/2016), 'RECEIVED DATE' (04/19/2016), 'SERVICE EXPIRATION DATE', 'SERVICE EXPIRATION TIME', 'PLAINTIFF' (The People of the State of Maryland), 'COMMENT' (text area), 'Section A' (Section A Help Message), 'AUTO COMPLETE' (checkbox), 'CHECKBOX' (checkbox), 'DATE AND TIME' (calendar icon), and 'SINGLE TEXT LINE' (text field).

The *Court Paper Log* tab contains a log of updates made to the Court Paper, and the officer can manually log the attempts to serve the paper. Hover over the bubble to display the notes the officer made.

**Note:** The **Add Log Entry** hyperlink appears while in *Edit* mode, and not while in *View* mode.



The *\$ Fee Audits* tab tracks incurred fees.



## Add

To create a new Court Paper select the **Add Court Paper** button to open the *Add Court Paper* screen.

**Add Court Paper** Go Back

**AGENCY**  
District 42, Versailles

**COURT PAPER TYPE**  
-Select-

**ISSUING STATE**  
Indiana

**PLAINTIFF**  
The People of the State of Maryland

**REFERENCE TYPE**  
-Select-

**FILED DATE**  
11/22/2019

**COURT PAPER SUBTYPE**  
-Select-

**ISSUING COUNTY**  
-Select-

**AGENCY ONLY**

**REFERENCE NUMBER**

**RECEIVED DATE**  
11/22/2019

Go Back Save

Select from the drop-down lists and enter other necessary information. Any field with a red left-hand border is a required field. You must complete required fields to continue.

Click the **Save** button to create the record and display the *Edit Court Paper* screen.

## Edit Court Paper

The *Edit Court Paper* screen allows you to continue entering information section by section. Data entered in the *Add Court Paper* screen auto populates into the fields within this screen.

Go Back Delete Quick Print Print

🏠 Court Paper Information ☰ Court Paper Log \$ Fee Audits ← Three tabs

### Court Paper

COURT PAPER ID 382	STATUS Open	COURT PAPER TYPE Summons	COURT PAPER SUB TYPE Domestic Violence
ISSUING STATE Indiana	ISSUING COUNTY Benton County	AGENCY District 42, Versail	AGENCY ONLY <input type="checkbox"/>
FILED DATE 03/15/2019	RECEIVED DATE 03/15/2019	SERVICE EXPIRATION DATE	SERVICE EXPIRATION TIME
PLAINTIFF The People of the State of Maryland			
COMMENT			

#### Section A

Section A Help Message

AUTO COMPLETE	CHECKBOX
<input type="text"/>	<input type="checkbox"/>
DATE AND TIME	SINGLE TEXT LINE
<input type="text"/>	<input type="text"/>
RADIO BUTTONS	OFFICER
<input type="radio"/> SUNDAY <input type="radio"/> MONDAY <input type="radio"/> TUESDAY <input type="radio"/> WEDNESDAY <input type="radio"/> THURSDAY <input type="radio"/> FRIDAY <input type="radio"/> SATURDAY	<input type="text"/>
SINGLE VALUE LOV	
-Select-	

MULTI VALUE LOV

#### Reference Numbers

+ Add Reference Number

Reference Type	Reference Number	Actions
Court Case Number	CRT1255	

#### Received From Agency Details

NO RECEIVED FROM AGENCY  SELECT RECEIVED FROM AGENCY  SPECIFY RECEIVED FROM AGENCY

RECEIVED FROM AGENCY

This section is dsigned to capture civil service information from other agencies such as Prosecutor Office. Not intended for Law Offices.

AGENCY NAME 2	ADDRESS	ADDRESS 2	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
CITY	STATE	ZIP	PHONE
<input type="text"/>	-Select-	<input type="text"/>	<input type="text"/>
COMMENT			
<input type="text"/>			

**Court Details**

COURT APPEARANCE DATE / TIME  Enter Days to Respond

If court locations are filled out in agency settings, then they appear in the *Select Court Location* when that option is selected. Or you can manually type in information with *Specify Location*.

NO COURT LOCATION  SELECT COURT LOCATION  SPECIFY COURT LOCATION

COURT LOCATION

COURT NAME 2  ADDRESS  ADDRESS 2

CITY  STATE  ZIP  PHONE

COMMENT

---

**Officers**

---

**To Be Served People**

---

**To Be Served Organizations**

---

**Other People**

---

**Other Organizations**

---

**Fee Collections**

TOTAL FEES FOR COURT PAPER: \$0.00    REMAINING UNPAID FEES: \$0.00

---

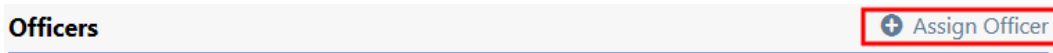
**Attachments**


---

**Attached Forms**

The next section is the Officer section of the module. This can be utilized if you want to assign the paper to a specific Officer. The officer receives notification of the assignment and it appears in their *Recent Activities*.

To add Officer to paper, click the **Assign Officer** link.



When a list of officers appears, click the Select icon  to make your selection. You can also apply filters to shorten the list from which to choose.

**Search Parameters**

AGENCY FILTER:  Agency  My Organization

OFFICER FILTER:  All  Detectives  Patrol

OPTIONAL SEARCH TEXT: Enter search text Search By [v]

Reset Search

Officer Name	Title	Agency	Date Last Assigned	Active Papers Assigned	Actions
Christine Saur		District 42, Versailles	02/13/2019	1	
Dispatch Officer		District 42, Versailles	03/05/2019	1	
Greg Wright	SERGEANT-CAPTAIN-WIN	District 42, Versailles		0	
Jeff Hanover	Officer Supervisor	District 42, Versailles	02/26/2015	2	
ODL User		District 42, Versailles	11/08/2018	1	

Go Back

Officer Details window opens. This is where you can leave comments to officer and also check to notify officer.

**Officer Details**

Officer Name	Title	Internal ID / Badge #	Date Last Assigned	Active Paper Assignments
Christine Saur		SAUR111		0

ASSIGN DATE / TIME: 03/15/2019 1320

COMMENTS: [Text Area]

NOTIFY USER:

Go Back Save

Next two sections are about the Persons/Organizations to be served and the Other Persons/Organizations involved with the paper. Caliber Public Safety recommends using the **Advanced Search/Add** link to search *Master Index* data. For more information on *Master Index*, refer to "Master Indices" on page 71.

**To Be Served People** Add Unknown Person Quick Search Person **Advanced Search / Add**

Person Details	Service Address	Status	Role	Fee Total	Actions
<b>Name:</b> Incident Person01 <b>Sex:</b> Female <b>Race:</b> Black or African American <b>DOB:</b> 11/01/1970 (Age:48)		Active	Petitioner	\$36.12	


**To Be Served Organizations** Quick Search Organization **Advanced Search / Add**

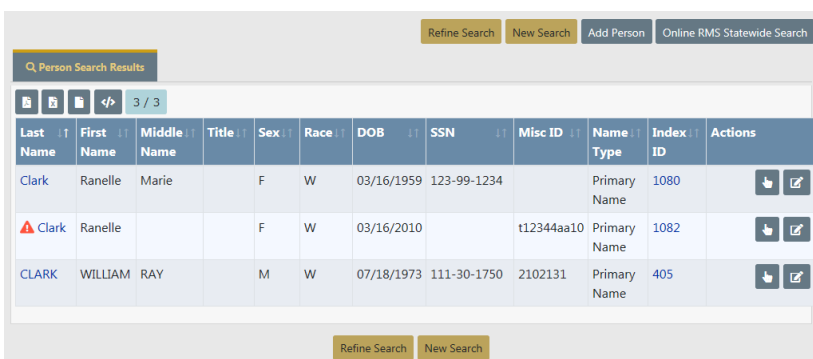
**Other People** Quick Search Person **Advanced Search / Add**








**Other Organizations** Quick Search Organization **Advanced Search / Add**



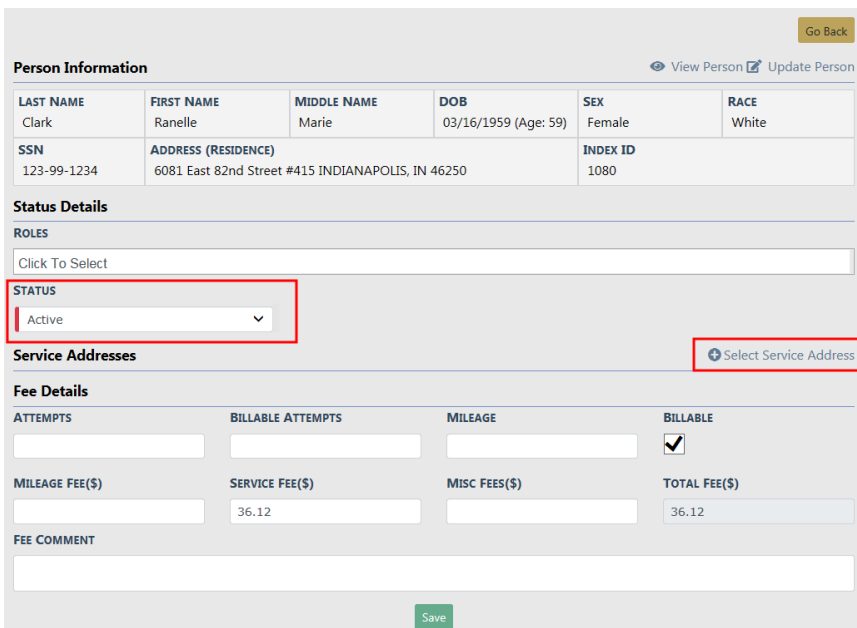
- The **Add Unknown Person** link captures service where evictions might be involved, or total number of people to be served is not known. Agencies have different uses for this.
- The *Other People/Organizations* section captures the non-serveable persons or organizations of the paper. Typical usage is for the payor, and where garnishments and fees are handled.


Perform search on the person /organization that you would like serve. Select the person that is to be served, if exists, by the **Index I.D.** or by using the **Select** icon  in the *Actions* column. Add new person if not in the *Master Index*. For more information on adding a person refer to "Adding Person" on page 85 in the *Master Indices* section.



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	 

Half way down is a drop-down that lets you set the **Status** for the person. This is what triggers your *Master Name Index* to notify officers of an Active Paper when a master name search is done. Also, click on the **Select Service Address** link to select the address that ties to the selected person.



**Person Information** View Person  Update Person


LAST NAME	FIRST NAME	MIDDLE NAME	DOB	SEX	RACE
Clark	Ranelle	Marie	03/16/1959 (Age: 59)	Female	White
SSN	ADDRESS (RESIDENCE)		INDEX ID		
123-99-1234	6081 East 82nd Street #415 INDIANAPOLIS, IN 46250		1080		


**Status Details**

ROLES

Click To Select

**STATUS**

Active 

**Service Addresses**  Select Service Address

**Fee Details**

ATTEMPTS	BILLABLE ATTEMPTS	MILEAGE	BILLABLE
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>
MILEAGE FEE(\$)	SERVICE FEE(\$)	MISC FEES(\$)	TOTAL FEE(\$)
<input type="text"/>	36.12	<input type="text"/>	36.12

FEE COMMENT

Fee details are discussed little more in detail later. From the officer serving the paper they typically only have access to the non gray boxes and the comment section. Attempts also can be captured in the log with a note of mileage. The use of this would be a business process determine by agency of when and whom applies Fee details.

Click **Save** to save the person/organization record to the Court Paper.

Adding **Other Person/Organization** to paper is done by some advanced search/add method. After selecting from *Master Index* or adding new you will be taken to this page. For more information on *Master Index*, refer to "Master Indices" on page 71.

**NOTE:** The Fee collection only shows after the **Payor Role** is selected. You can have more that one role assigned.

NAME	TYPE	BUSINESS #	INDEX ID
Automation Industries	Law Office	123	240000007

ADDRESS (BUSINESS)  
126 North 750 West IN

**Details**

**ROLES**

Click To Select

Save

ROLES

- Bounty Hunter
- Collection Organization
- Executor
- Garnishee
- Law Firm
- Other Contact Organization

- You can select more than one role. The *Payor* role triggers the *Fee Collections* section that keeps track of fees owed and is searchable.
- Any field with a red left-hand border is a required field. You must complete required fields to continue.

Click **Save** to save the other person/organization record to the Court Paper.

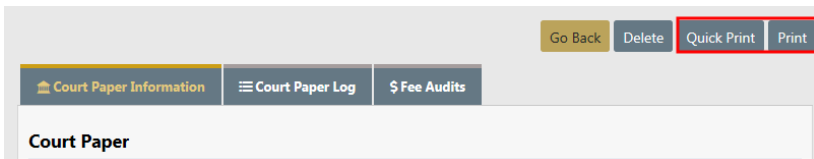
The last sections are the *Attachments* and *Forms* sections. You can add any relevant attachments to the paper or if your agency has a custom form associated with civil process it would be selectable here as well.

**Attachments** Add Attachment

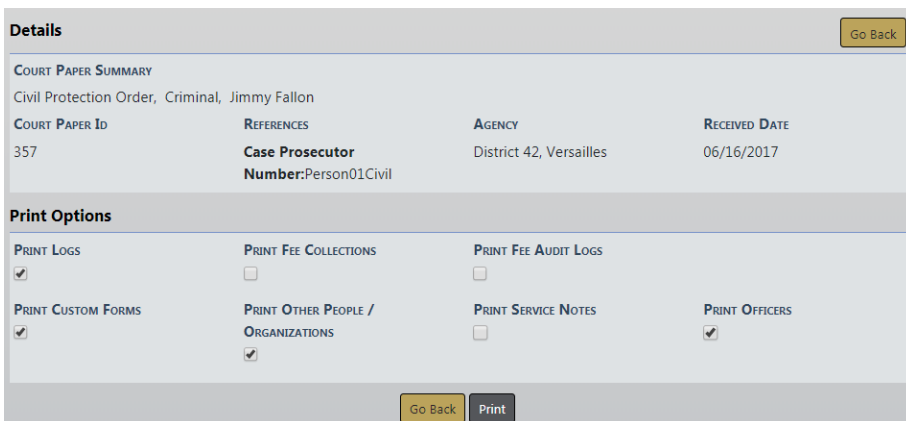
**Attached Forms** Add Form | -Select-

## Print Court Paper

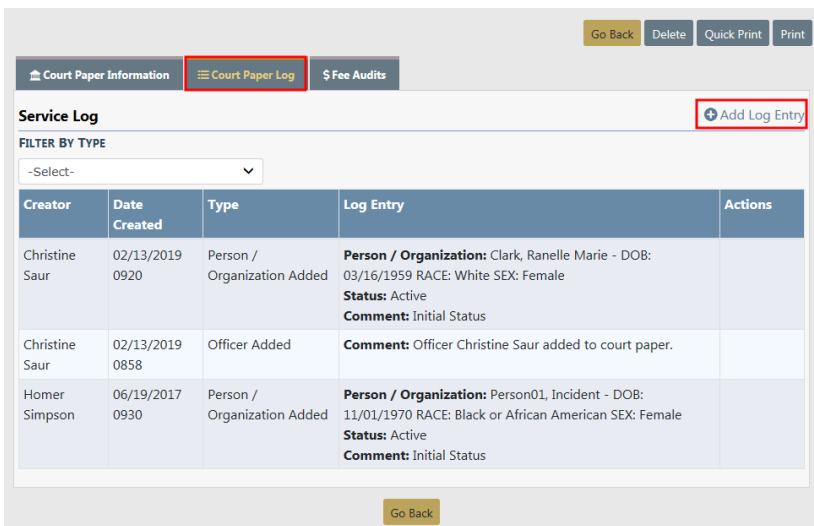
From the *View Court Paper* and *Edit Court Paper* screens there are **Print** and **Quick Print** options on the top right of the screen to print a cover page for your civil/court paper.



The **Print** button gives you selectable options to include on your cover sheet, whereas, **Quick Print** does not.






System creates system log entries automatically. You can also click the **Add Log Entry** link to manually enter log actions.



## Add Mileage/Attempts and Fees


While on the Court Paper, page down to the **To Be Served People** section. . The permissions to manage Fee details is given by default to both the *Agency Admin Role* and *LEA Clerk Management Role*; all other users only have ability to edit the **Attempts** and **Mileage** boxes.

**To Be Served People** [Add Unknown Person](#) [Quick Search Person](#) [Advanced Search / Add](#)


Person Details	Service Address	Status	Role	Fee Total	Actions
<b>Name:</b> James X2 Fallon <b>Sex:</b> Male <b>Race:</b> White <b>DOB:</b> 06/01/1972 (Age:46)		Active	Petitioner	\$336.12	  

**To Be Served Organizations** [Quick Search Organization](#) [Advanced Search / Add](#)

**Other People** [Quick Search Person](#) [Advanced Search / Add](#)

Click on the **Edit** icon  to open the court paper. The *Person Information* displays.

**Person Information** [View Person](#) [Update Person](#) [Go Back](#)

LAST NAME Fallon	FIRST NAME James	MIDDLE NAME X2	DOB 06/01/1972 (Age: 46)	SEX Male	RACE White	 (1/2) 06/16/2017
DRIVER'S LICENSE # AK22222	DRIVER'S LICENSE STATE Alaska	SSN 222-22-2222	ALIASES Jimmy F(Alias)			
EYE COLOR Blue						
INDEX ID 996						

**Status Details**

ROLES

Petitioner

STATUS

At the bottom of the page is a section where you fill in the information in regards to tracking the service of the paper. You can notate attempts, the mileage for the attempts, and the fee's to be collected in regards to the court paper.

**Fee Details**

ATTEMPTS	BILLABLE ATTEMPTS	MILEAGE	BILLABLE
<input type="text"/>	<input type="text"/>	600	<input checked="" type="checkbox"/>
MILEAGE FEE(\$)	SERVICE FEE(\$)	MISC FEES(\$)	TOTAL FEE(\$)
300.00	36.12		336.12

FEE COMMENT

[Go Back](#) [Update](#)

## Status Details

The **Status** of the paper would be changed to show the final status that the paper would have. Choices would be in status details section in the following screen shot to capture a served-executed paper service.

STATUS  
Returned - Request of Plaintiff

DATE / TIME

PLAINTIFF  
 SELECT PLAINTIFF  ADD PLAINTIFF  ENTER PLAINTIFF

PLAINTIFF  
Select

STATUS COMMENT

Select the **Update** button to save your changes.

Once you are finished with paper the *Fee Collections* section is completed. You now want to be able to collect fees and keep track of what has been paid on and what might still be owed.

Click the **Edit** icon on the *Organization Details* for the Payor and then click the **Add** link. This will create another entry point for receiving remainder fees as they come in.

**Fee Audits** also display on the *Edit Court Paper* screen.

Fee Audits

Fallon, Jim X3 - DOB: 06/01/1973 RACE: White SEX: Male

New	Old	Changed By
Mileage: 900	Mileage:	User: Homer Simpson
Mileage Fee: 450	Mileage Fee:	Date: 06/16/2017 1232
Service Fee: 36.12	Service Fee:	

You can click the **Print** or **Quick** button to generate a *Court Paper Report*. For details on printing the report, refer to "Print Court Paper" on page 531.



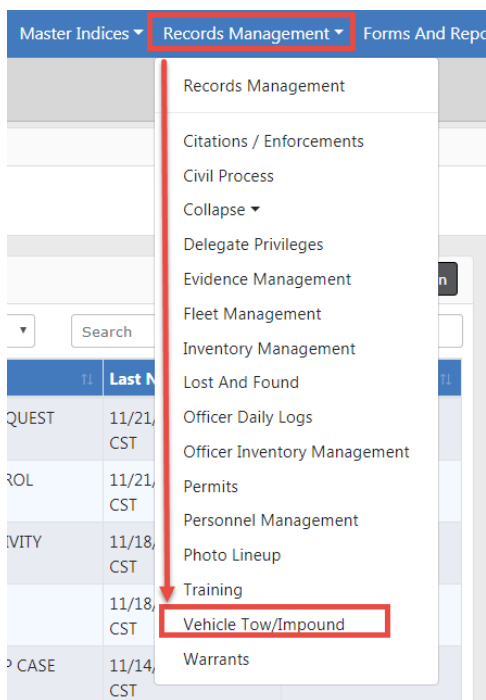
# Chapter 29. Vehicle Tow/Impound

## Overview

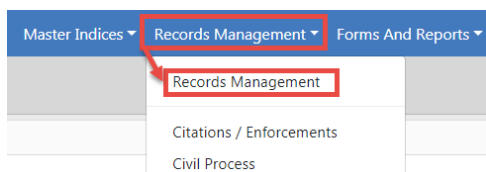
The **Vehicle Tow/Impound** module is found under the *Records Management* menu on the *Home Page*

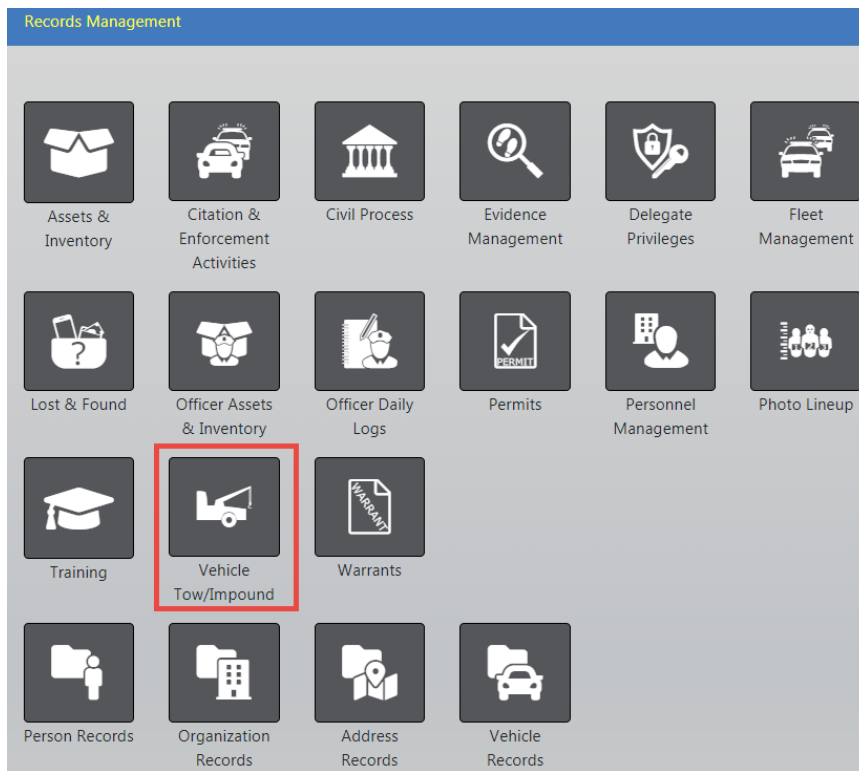
You can access this module two ways:

- Click *Records Management* on the top navigation bar, then click **Vehicle Tow/Impound**.



- Click *Records Management* on the top navigation bar, click on the *Records Management* option that appears in the drop-down list, then click the **Vehicle Tow/Impound** link.





Either method opens the *Vehicle Tow/Impound Search* screen. After selecting the icon you are taken to *Search* application. You can either view the delete log, add a new record, or search the system for data that matches specific criteria.

**Impound Search** View Delete Log

IMPOUND ID	VEHICLE ID	TOWING AGENCY
<input type="text"/>	<input type="text"/>	All Agencies
ASSOCIATED INCIDENT REPORT #	OTHER REFERENCE #	DISPOSITION
<input type="text"/>	<input type="text"/>	-Select-
TOWED FROM	CITY	
<input type="text"/>	<input type="text"/>	
DISPATCH #	NON-RELEASED VEHICLE	
<input type="text"/>	<input type="checkbox"/>	
TOW DATE FROM	TOW DATE TO	RELEASE DATE FROM
<input type="text"/>	<input type="text"/>	<input type="text"/>
RELEASE DATE TO		
<input type="text"/>	<input type="text"/>	

**Vehicle Details**

YEAR	MAKE	MODEL
<input type="text"/>	<input type="text"/>	<input type="text"/>
VIN #	TYPE	STYLE
<input type="text"/>	-Select-	-Select-
LICENSE PLATE		
<input type="text"/>		

ADDITIONAL SEARCH CRITERIA

-- Select --



Click **Go Back** to return to the previous screen, click **Reset** to start a new search, or click the **Search** button to search for records containing the entered criteria.

For information on viewing the delete log refer to "Logs" on page 552.

For information on adding a new tow/impound record refer to "Enter New Vehicle Tow" on page 540.

For information on searching for existing records refer to "Search Vehicle Tow/Impound" below.

## Search Vehicle Tow/Impound

Access the *Vehicle Tow/Impound Search* page to begin your search. For more information on accessing the *Vehicle Tow/Impound Search* page refer to "Overview" on page 535.

**Impound Search** View Delete Log Add Vehicle Tow/Impound

IMPOUND ID  VEHICLE ID  TOWING AGENCY

ASSOCIATED INCIDENT REPORT #  OTHER REFERENCE #  DISPOSITION

TOWED FROM  CITY

DISPATCH #  NON-RELEASED VEHICLE

TOW DATE FROM  TOW DATE TO  RELEASE DATE FROM  RELEASE DATE TO

**Vehicle Details**

YEAR  MAKE  MODEL

VIN #  TYPE  STYLE

LICENSE PLATE

ADDITIONAL SEARCH CRITERIA

Go Back Reset Search

Click on the **Add Vehicle Tow/Impound** button to add a new tow record. For more information on adding a new tow record, refer to "Enter New Vehicle Tow" on page 540.

Click on the **View Delete Log** button to view deleted tow records.

Vehicle Tow / Impound Search / Tow / Impound Delete Log

Go Back

Search  Reset Search Show 10 entries

Log Id	Vehicle Id	Deleted By	Date	Comments	Impounding Agency	Location of Impound
1	33	Waterman, Debbie - Captain, ID# 12345(DEBBIE)	07/19/2018 1416	<span style="color: blue;">i</span>	District 42, Versailles	
2	608	Simpson, Homer(STATE_OFFICER11)	11/29/2018 0856	<span style="color: blue;">i</span>	District 42, Versailles	
3	765	Simpson, Homer(STATE_OFFICER11)	03/11/2019 1321	<span style="color: blue;">i</span>	District 42, Versailles	DENVER

Showing 1 to 3 of 3 entries

Previous 1 Next

Click the **Go Back** button to return to the *Vehicle Tow/Impound Search* page.

Enter your search criteria on the *Vehicle Tow/Impound Search* page to search and locate existing records that match your entered criteria.

When searching by Make and Model, begin entering a portion of the word and a list will appear from which to choose. For example, enter *Chev* in the **Make** field to display a list that contains *Chev* then click on the appropriate item that appears on the list. Optionally, do the same for **Model**

MAKE MODEL

chev

- CHEVALLERO MOTOR HOME(CHVL)
- CHEVELLE MOBILE HOMES, INC(CHEX)
- CHEVROLET(CHEV)
- CHEVRON CORP(CHEP)
- CHEVELLE HOMES SALES CORP OF ALABAMA(CHEU)

The **Additional Search Criteria** allows you to include **Custom Fields**. The **Available Fields** appear; click in the field and choose from the drop-down list.

ADDITIONAL SEARCH CRITERIA

Custom Fields

AVAILABLE FIELDS

-Select Field-

**Note:** Custom Fields is available for agencies that have the Custom Fields feature enabled. Custom Fields captures data defined by the agency. For more information refer to your administrator.

Click the **Search** button to display the search results.

Impound ID	Vehicle ID	Towing Agency	Tow Date	Towed From	Approval Status	Actions
202	218	District 42, Versailles	12/06/2018 15:26	McDonalds	Approved	👍 👁 🗑
201	218	District 42, Versailles	11/26/2018 22:43	walmart	Initial	👁 📄 🗑
189	721	District 42, Versailles	07/31/2018 07:00		Initial	🔒 👁 📄 🗑

Hover the mouse over the blue information bubble to view a summary of the vehicle or click on the Impound ID to view vehicle and tow details.

YEAR	VIN	MAKE	MODEL	TYPE	STYLE
2009	AJJDL599V74HR75B	CHEVROLET(CHEV)	CAMARO	Automobile / Passenger	Sedan, 4-door
LICENSE PLATE	LICENSE STATE	LICENSE TYPE	LICENSE MONTH / YEAR	MISC ID	COLOR
GTO98837	MK	Amateur radio	7 / 2016	123	Yellow / Blue, Dark
DATE OF INFO	INDEX ID				
12/06/2018 11:03:43 AM	218				

With proper permissions, you can view, edit, delete Tow/Impound records, release holds, or release vehicles using the icons that appear under the *Actions* column. Only the icons to which you have access appear. If you do not have permissions to perform any of these tasks, refer to your system administrator.

### Action Icons


- View Vehicle Tow/Impound Record
- Edit Vehicle Tow/Impound Record. For instructions on editing tow records, refer to "Update Existing" on page 541.
- Delete Vehicle Tow/Impound Record
- Release Holds. For instructions on releasing holds, refer to "Vehicle Holds" on page 548.
- Release Vehicle. All Holds must be released before you can release a vehicle.

## Enter New Vehicle Tow

Access the *Vehicle Tow/Impound Search* page. For more information on accessing the *Vehicle Tow/Impound Search* page refer to "Overview" on page 535.

On the *Vehicle Tow/Impound Search* page, click the **Add Vehicle Tow/Impound** button to open the *Master Index Search* page. Search for the Master Vehicle Index record you want to add to the Tow/Impound module.

If the Master Vehicle Index record you are searching for does not exist, then click the **Add Vehicle** link to add a new Master Vehicle Index record. For more information on Master Indices refer to "Master Indices" on page 71.

In the *Vehicle Search Results* window, click the **Select**  icon on the vehicle you want to add to a new **Tow/Impound** record.

Refine Search New Search Add Vehicle

7 result(s) found

VIN	Type	Make/Model	Style	M/C CCs	Top/Bottom Color	License Plate	Year	State	Index ID	Actions
AJJDLS99V74HR75B	Automobile	CHEVROLET (CHEV) / CAMARO	Sedan, 4-door		White / Blue	GTO98837	2009		218	 
12345678901234567890	Automobile	CHEVROLET (CHEV) / CAMARO	Hardtop, 2-door		Purple / -	ABC123	2016	Colorado	721	 
SAFG651AS32165ETR651		CHEVROLET (CHEV) / MONTE CARLO			Blue / Blue, Dark	123456	1999	Alaska	46	 

**Vehicle Information** View Vehicle Edit Vehicle

YEAR	VIN	MAKE	MODEL	TYPE	STYLE
2009	AJJDLS99V74HR75B	CHEVROLET(CHEV)	CAMARO	Automobile / Passenger	Sedan, 4-door
LICENSE PLATE	LICENSE STATE	LICENSE TYPE	LICENSE MONTH / YEAR	MISC ID	COLOR
GTO98837	MK	Amateur radio	7 / 2016	123	Yellow / Blue, Dark
DATE OF INFO	INDEX ID				
12/06/2018 11:03:43 AM	218				

**Vehicle Description**

LICENSE #	LICENSE TYPE	STATE
GTO98837	Amateur radio	(Northern) Mariana Islands
LICENSE MONTH	LICENSE YEAR	
July	2016	
MISC IDENTIFIER	TOP COLOR	BOTTOM COLOR
123	Yellow	Blue, Dark
VALUE(\$)	ODOMETER	CONDITION
		-Select-
DAMAGE	DAMAGE REMARKS	
-Select-		

**Impound Information**

Enter the tow date and time and other relevant information for this **Tow/Impound** record. Any field with a red left-hand border is a required field. You must complete required fields to continue.

Click the **Save** button on the bottom of the page, or upper right.


The *Edit Impound* page appears, allowing you to select a **Towing Company**, or specify one if it is not in the system. Also you can associate people, organizations, and other information. Holds are also managed here on a separate tab, along with an audit log on another tab. For more information on the *Edit Impound* page refer to "Update Existing" below.

Click the **Print** button to print the record, or click the **Submit** button to submit the record for approval. For instructions on printing *Vehicle Tow/Impound* records, refer to "Print" on page 553.

YEAR	VIN	MAKE	MODEL	TYPE	STYLE
2009	AJJDL599V74HR75E	CHEVROLET(CHEV)	CAMARO	Automobile / Passenger	Sedan, 4-door
LICENSE PLATE	LICENSE STATE	LICENSE TYPE	LICENSE MONTH / YEAR	MISC ID	COLOR
GTO98837	MK	Amateur radio	7 / 2016	123	Yellow / Blue, Dark
DATE OF INFO	INDEX ID				
12/06/2018 11:03:43 AM	218				

## Update Existing

Search for the *Vehicle Tow/Impound* record you want to update. For more information on searching for existing records, refer to "Search Vehicle Tow/Impound" on page 537.

On the *Search Results* window identify the record you want to update then click the update icon  in the *Actions* column to open the *Edit Impound* page.

Tow/Impound
Holds
Log

**Vehicle** View Vehicle Edit Vehicle

YEAR 2009	VIN AJJDL599V74HR75B	MAKE CHEVROLET(CHEV)	MODEL CAMARO	TYPE Automobile / Passenger	STYLE Sedan, 4-door
LICENSE PLATE GTO98837	LICENSE STATE MK	LICENSE TYPE Amateur radio	LICENSE MONTH / YEAR 7 / 2016	MISC ID 123	COLOR YEL / DBL
DATE OF INFO 12/06/2018 11:03:43 AM	INDEX ID 218				

**Tow Summary**

IMPOUND ID 201		APPROVAL STATUS Initial	
TOWING AGENCY District 42, Versailles	DATE/TIME OF TOW 11/26/2018 22:43	OTHER REFERENCE #	CAD #
ASSOCIATED INCIDENT REPORT ID	TOWED FROM walmart	CITY	GEOGRAPHIC LOCATION District 42, Versailles
COUNTY -Select-			
COMMENTS			
<input type="button" value="Update"/>			

**Officers** Add Officer

Badge #	Name	Role	Agency	Actions

The *Edit Impound* page contains three tabs:

- Tow/Impound
- Holds
- Log

Click the **Print** button on the top right to print the record. For instructions on printing *Vehicle Tow/Impound* records, refer to "Print" on page 553.

## Tow/Impound Tab

The *Edit Impound* page defaults to this tab, which contains multiple sections:

- Vehicle Information
- People
- Organizations
- Tow Summary
- Officers

- Vehicle Description
- Towing Details
- Inventory
- Attachments (i.e., documents and photos)

## Vehicle Information

This section displays the *Master Vehicle Index* data. You can click on the **View Vehicle** link to view details of the index record or you can, with proper permissions, click on the **Edit Vehicle** link to edit the *Master Vehicle Index* record.

Vehicle Information						<a href="#">View Vehicle</a> <a href="#">Edit Vehicle</a>
YEAR	VIN	MAKE	MODEL	TYPE	STYLE	
2009	AJJDLS99V74HR75B	CHEVROLET(CHEV)	CAMARO	Automobile	Sedan, 4-door	
LICENSE PLATE	LICENSE STATE	LICENSE TYPE	LICENSE MONTH / YEAR	MISC ID	COLOR	
GTO98837	MK	Amateur radio	7 / 2016	123	YEL / DBL	
DATE OF INFO	INDEX ID					
12/06/2018 11:03:43 AM	218					

## People

The **People** section allows you to search the *Master Name Index* and use existing records if already in system by clicking on the **Quick Search Person** link, or you can, with proper permissions, add a new *Master Name Index* record by clicking on the **Advanced Search / Add** link. For more information on Master Indices, refer to "Master Indices" on page 71.

People			<a href="#">Quick Search Person</a> <a href="#">Advanced Search / Add</a>
Person	Role	Actions	
<b>Name:</b> Ranelle Marie Clark <b>Sex:</b> Female <b>Race:</b> White <b>DOB:</b> 03/16/1959 (Age:59)	Driver		

*Owner information* is required to update a Tow Impound record. If the record does not contain owner information, a message appears in red across the top of the form and below the Vehicle section when you click on the Update button. If the owner is unknown, check the **Unknown Owner** box to override the *owner required* warning.

An Owner is required. Please enter a Person or Organization with the role of Owner or check the "Unknown Owner" checkbox under Owner Information

Go Back Print Submit

Tow/Impound Holds Log

View Vehicle Edit Vehicle

VIN	MAKE	TYPE	STYLE	LICENSE PLATE	LICENSE STATE
9876548745	AUDI(AUDI)	Automobile / Passenger	Sedan, no. of doors unkno	HHH990	MD
LICENSE MONTH / YEAR	COLOR	DATE OF INFO	INDEX ID		
- / -	Blue / -	07/20/2020 04:32:03 PM	617		

Owner Information An Owner is required. Please enter a Person or Organization with the role of Owner or check the "Unknown Owner" checkbox below.

UNKNOWN OWNER

People Quick Search Advanced Search

Organizations Quick Search Advanced Search

### Organizations

The **Organizations** section allows you to search the *Master Organization Index* and use existing records if already in system by clicking on the **Quick Search Organization** link, or you can, with proper permissions, add a new *Master Organization Index* record by clicking on the **Advanced Search/Add** link. For more information on Master Indices, refer to "Master Indices" on page 71.

Organizations Quick Search Organization Advanced Search / Add

Organization	Role	Actions
Name: All Blacks Rugby Type: Wholesale, Durable Goods Address: 2924 East 1250 South Building #99 Battle Ground, IN 47920 Phone (Business): 406-789-8954	Owner	

### Tow Summary

Enter the appropriate information then click the **Update** button. Required fields display a red border to the left of the field.

**Note:** The **Towing Agency** defaults to your agency and should not be changed.



**Tow Summary**

<b>IMPOUND ID</b> 201		<b>APPROVAL STATUS</b> Initial	
<b>TOWING AGENCY</b> District 42, Versailles	<b>DATE/TIME OF TOW</b> 11/26/2018 2243	<b>OTHER REFERENCE #</b> 	<b>CAD #</b> 
<b>ASSOCIATED INCIDENT REPORT ID</b> 	<b>TOWED FROM</b> walmart	<b>CITY</b> 	<b>GEOGRAPHIC LOCATION</b> District 42, Versailles
<b>COUNTY</b> -Select-			
<b>COMMENTS</b> 			

[Update](#)

## Officers

Click the **Add Officer** button to add an officer, then click **Save**. Required fields display a red border to the left of the field.

**Officers** [Add Officer](#)

Badge #	Name	Role	Agency	Actions
SAUR111	Christine Saur	Impounding	District 42, Versailles	

Add Officer

<b>OFFICER</b> Officer Joe Hedges(Badge #: 7049)	<b>ROLE</b> Assisting
---	--------------------------

[Cancel](#) [Save](#)

## Vehicle Description

Enter the appropriate information then click the **Update** button. This is information based on your current observation.

Vehicle Description		
<b>LICENSE PLATE</b> GTO98837	<b>LICENSE TYPE</b> Amateur radio	<b>LICENSE STATE</b> (Northern) Mariana Islands
<b>LICENSE MONTH</b> July	<b>LICENSE YEAR</b> 2016	
<b>MISC ID</b> 123	<b>TOP COLOR</b> Yellow	<b>BOTTOM COLOR</b> Blue, Dark
<b>VALUE(\$)</b> 123	<b>ODOMETER</b> 44555	<b>CONDITION</b> FAIR
<b>DAMAGE</b> Burned	<b>DAMAGE REMARKS</b> Testing	
<input type="button" value="Update"/>		

## Towing

Select one towing option: *No Towing*, *Select Company*, or *Specify Company*.

If you choose *Select Company* or *Specify Company*, enter the appropriate information in the fields provided. If you choose *No Towing*, no additional fields appear. Required fields display a red border to the left of the field.

Towing		
<input type="radio"/> NO TOWING <input checked="" type="radio"/> SELECT COMPANY <input type="radio"/> SPECIFY COMPANY		
<b>FILTER BY COUNTY</b> -Select-	<b>COMPANY NAME</b> ACME WRECKER	
<b>ADDRESS</b> 100 Anywhere	<b>CITY</b> Indianapolis	<b>STATE</b> Indiana
<b>ZIP</b> 46204	<b>PHONE #</b> 777 - 777 - 7777	<b>DRIVER</b> Tom Smith
<b>REFERENCE NUMBER</b> 12345	<b>IMPOUND STORAGE</b> Storage Lot	<b>AUTHORIZING OFFICER</b> Matt Johnson(Badge #: 111)
<b>TOW REASONS</b> <input checked="" type="checkbox"/> Accident <input checked="" type="checkbox"/> Investigation <input checked="" type="checkbox"/> Other		
<b>COMMENTS</b> my testing comments		
<input type="button" value="Update"/>		

Towing
<input type="radio"/> NO TOWING <input checked="" type="radio"/> SELECT COMPANY <input type="radio"/> SPECIFY COMPANY

Click the **Save** button to save the record.

## Inventory

Click the **Add Item** link to add an Inventory item.

Inventory			+ Add Item
Description	Quantity	Actions	
No Data To Display			

## Attachments

Click the **Add Attachment** link to add photos or documents.

Attachments					+ Add Attachment
Type	File Name	Description	Date of Info	Actions	
No Data To Display					

For more information on attachments, refer to "Attachments" on page 59.

## Holdings Tab

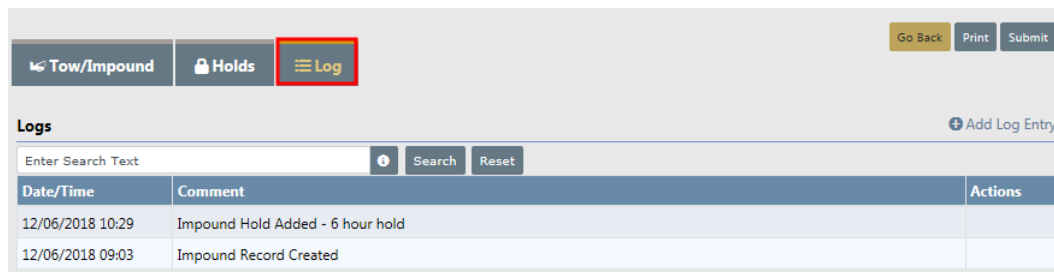
This tab contains dates, reasons, and comments pertaining to vehicle holds and releases.

Holds							+ Add Hold
Hold	Reason	Hold Date	Comments	Hold Released?	Hold Release Date	Actions	
6 hour hold	Verify Owner	12/06/2018 1129		No		  	

For more information on holds, refer to "Vehicle Holds" on the next page.

## Log Tab

Data that contains the date, time, and a summary of what occurred such as, when the record was created in Online RMS, hold and release dates, etc. The data is generated by Online RMS automatically, and you have the ability to manually add a log entry.



For more information on Log entries, refer to "Logs" on page 552.

## Vehicle Holds

You can place a hold from the *Holds* tab of the *Edit Impound* page.

For more information on accessing the *Edit Impound* page, refer to "Update Existing" on page 541.

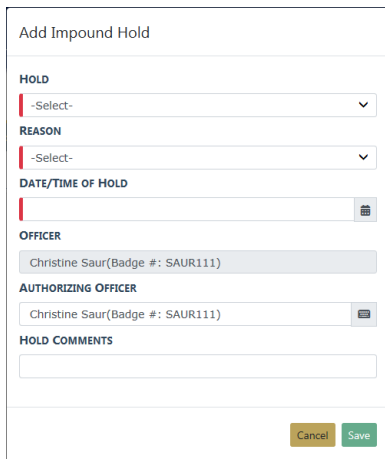
## Place a Hold

Click on the *Holds* tab of the *Edit Impound* page.

Click on the **Add Hold** link to open the *Add Impound Hold* window.



Enter the appropriate information in the *Add Impound Hold* window, then click **Save**. Any field with a red left-hand border is a required field. You must complete required fields to continue.



The screenshot shows a form titled "Add Impound Hold". It contains several fields: "HOLD" with a dropdown menu showing "-Select-"; "REASON" with a dropdown menu showing "-Select-"; "DATE/TIME OF HOLD" with a date/time picker icon; "OFFICER" with a text field containing "Christine Saur(Badge #: SAUR111)"; "AUTHORIZING OFFICER" with a text field containing "Christine Saur(Badge #: SAUR111)"; and "HOLD COMMENTS" with a text area. At the bottom right, there are "Cancel" and "Save" buttons.

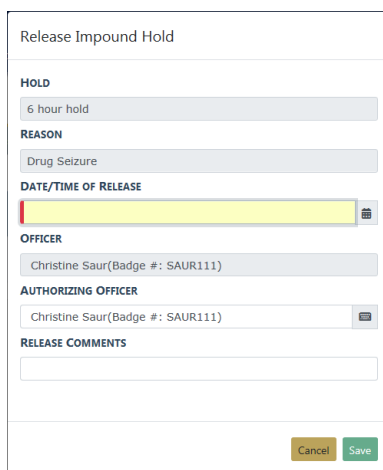
You can edit, delete, or release a hold by clicking on the appropriate action icon.

## Release Holds

There are two ways you can release a hold:

- From the *Holds* tab of the *Edit Impound* page.

To release a hold on a vehicle, click on the **Release Hold** icon  that appears in the *Actions* column to open the *Release Impound Hold* window.



The screenshot shows a form titled "Release Impound Hold". It contains several fields: "HOLD" with a text field containing "6 hour hold"; "REASON" with a text field containing "Drug Seizure"; "DATE/TIME OF RELEASE" with a date/time picker icon; "OFFICER" with a text field containing "Christine Saur(Badge #: SAUR111)"; "AUTHORIZING OFFICER" with a text field containing "Christine Saur(Badge #: SAUR111)"; and "RELEASE COMMENTS" with a text area. At the bottom right, there are "Cancel" and "Save" buttons.



Enter the **Date and Time of Release** and **Release Comments**, then click the **Save** button.


For more information on accessing the *Edit Impound* page, refer to "Update Existing" on page 541.

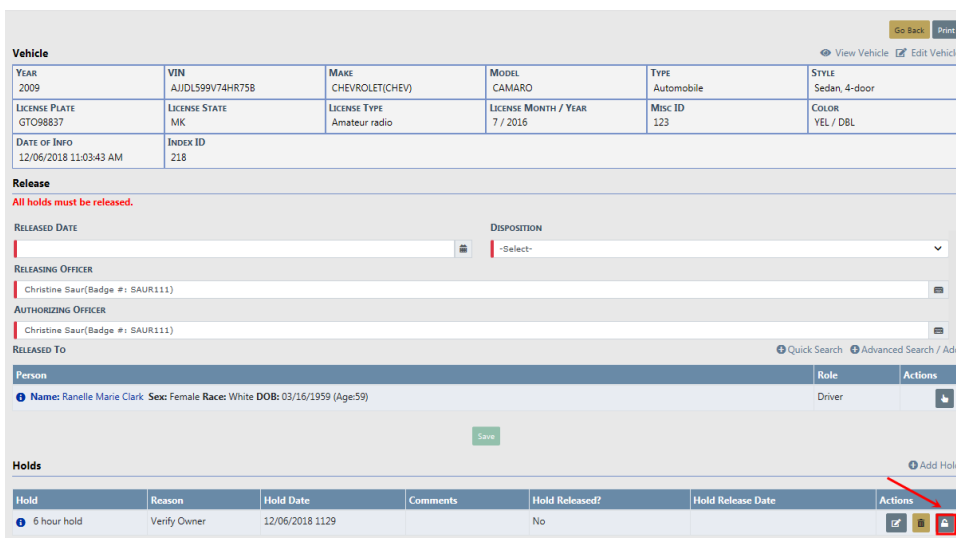
- From the *Impound Search Results*.

Click on the **Release Hold** icon  to open the *Release Impound* page



Impound Id	Vehicle Id	Towing Agency	Tow Date	Towed From	Approval Status	Actions
202	218	District 42, Versailles	12/06/2018 09:59		Initial	
201	218	District 42, Versailles	11/26/2018 22:43	walmart	Initial	

Click on the **Release Hold** icon  in the *Holds* section to open the *Release Impound Hold* window.



**Vehicle**

YEAR	VIN	MAKE	MODEL	TYPE	STYLE
2009	AJJDLS99V74HR75B	CHEVROLET(CHEV)	CAMARO	Automobile	Sedan, 4-door
LICENSE PLATE	LICENSE STATE	LICENSE TYPE	LICENSE MONTH / YEAR	MISC ID	COLOR
GTO98837	MK	Amateur radio	7 / 2016	123	YEL / DBL
DATE OF INFO	INDEX ID				
12/06/2018 11:03:43 AM	218				

**Release**


All holds must be released.

RELEASED DATE:  DISPOSITION:


RELEASING OFFICER: Christine Saur(Badge #: SAUR111)

AUTHORIZING OFFICER: Christine Saur(Badge #: SAUR111)

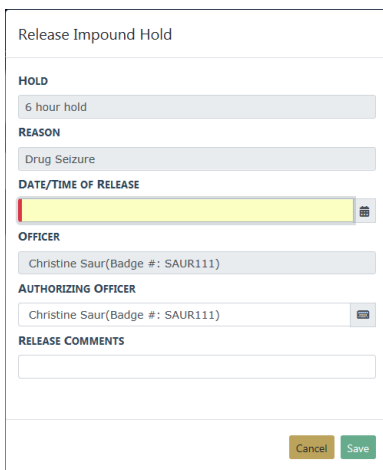
RELEASED TO:

Person	Role	Actions
Name: Ranelle Marie Clark Sex: Female Race: White DOB: 03/16/1959 (Age:59)	Driver	

**Holds**

Hold	Reason	Hold Date	Comments	Hold Released?	Hold Release Date	Actions
6 hour hold	Verify Owner	12/06/2018 1129		No		

Enter the Date and Time of Release, and **Release Comments**, then click **Save**.



Release Impound Hold

**HOLD**  
6 hour hold

**REASON**  
Drug Seizure

**DATE/TIME OF RELEASE**

**OFFICER**  
Christine Saur(Badge #: SAUR111)

**AUTHORIZING OFFICER**  
Christine Saur(Badge #: SAUR111)


**RELEASE COMMENTS**

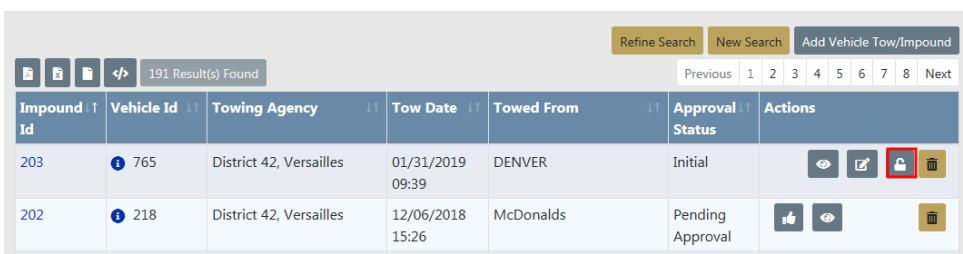
For more information on accessing the search results, refer to "Search Vehicle Tow/Impound" on page 537.








## Release Vehicles

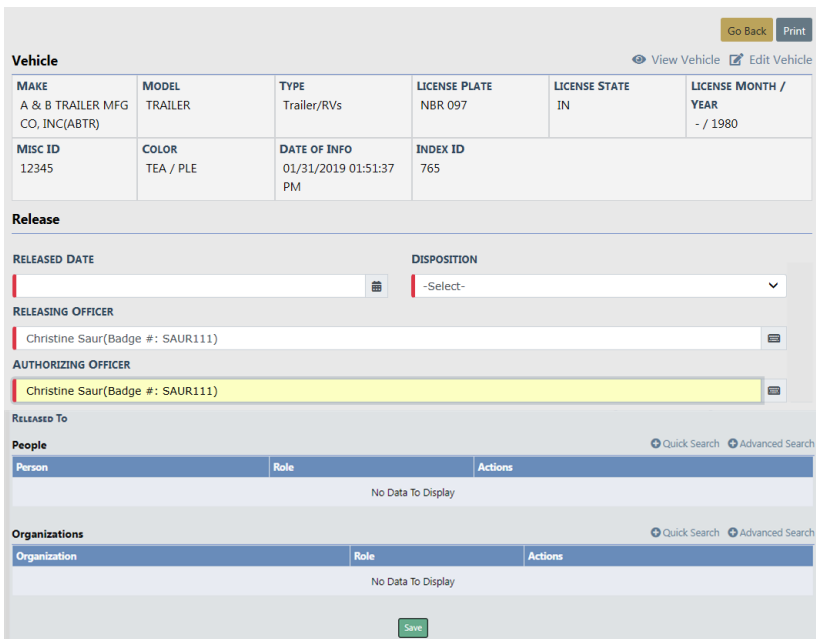
Vehicles are **Released** from impound from the *Impound Search Results* page.

Search for the *Vehicle Tow/Impound* record you want to release from impound. For more information on accessing the *Impound Search* page refer to "Overview" on page 535.

Locate the appropriate record in the *Impound Search Results* page that you want to release, then click on the **Release Vehicle** icon  in the *Actions* column to open the *Release Vehicle Tow/Impound* form.



Impound Id	Vehicle Id	Towing Agency	Tow Date	Towed From	Approval Status	Actions
203	765	District 42, Versailles	01/31/2019 09:39	DENVER	Initial	   
202	218	District 42, Versailles	12/06/2018 15:26	McDonalds	Pending Approval	  



**Vehicle**

MAKE A & B TRAILER MFG CO, INC(ABTR)	MODEL TRAILER	TYPE Trailer/RVs	LICENSE PLATE NBR 097	LICENSE STATE IN	LICENSE MONTH / YEAR - / 1980
MISC ID 12345	COLOR TEA / PLE	DATE OF INFO 01/31/2019 01:51:37 PM	INDEX ID 765		

**Release**

RELEASED DATE:  DISPOSITION:

RELEASING OFFICER:

AUTHORIZING OFFICER:

RELEASED TO

**People**

Person	Role	Actions
No Data To Display		

**Organizations**

Organization	Role	Actions
No Data To Display		

**Note:** All vehicle **Holds** must be released prior to releasing the vehicle. For instructions on releasing **Holds**, refer to "Vehicle Holds" on page 548.


Any field with a red left-hand border is a required field. You must complete required fields to continue.

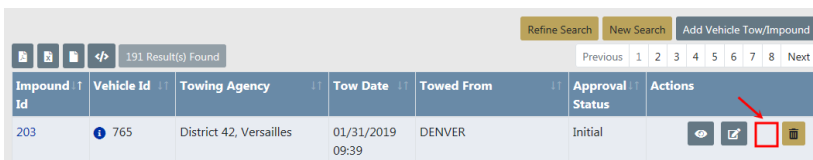
Click either the **Quick Search** or **Advanced Search** link to search and select the person or organization to whom the vehicle is **Released To**.





**Note:** If the person or organization record does not exist and you have proper permissions, you can create the *Master Person Index* or *Master Organization Index* record by clicking on the **Advanced Search** link. For instructions on creating a *Master Person Index* record, refer to the "Adding Person" on page 85 section of the *Master Indices* chapter (follow a similar process when adding *Master Organizations*). For more information on permissions, refer to your system administrator.

Click the **Save** button. A **Successfully Updated** message briefly appears above the **Released Date**.

A record is added to the **Log** automatically.

Click on the **Go Back** button at the top of the page to return to the *Search Results* page. The **Release Vehicle** icon  no longer displays in the *Actions* column on the vehicle record, indicating the vehicle is no longer in impound status.



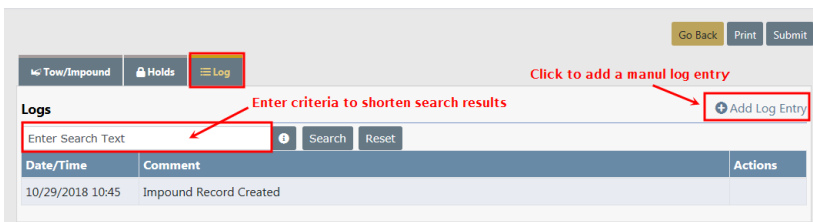
Impound Id	Vehicle Id	Towing Agency	Tow Date	Towed From	Approval Status	Actions
203	765	District 42, Versailles	01/31/2019 09:39	DENVER	Initial	   

Click on the **Go Back** button to return to the *Vehicle Tow/Impound Search* page.

## Logs

The *Log* tab of the *Edit Impound* page displays impound activity that was systematically logged for that particular vehicle, including manual log entries you create. For details on accessing the *Edit Impound* page, refer to "Update Existing" on page 541.

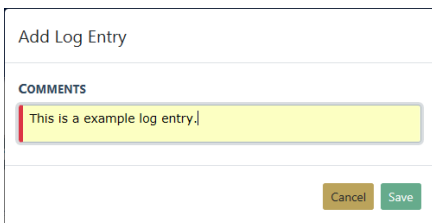
The number of log entries can get long. To search for particular log entries, enter a keyword in the search text field then click the **Search** button.





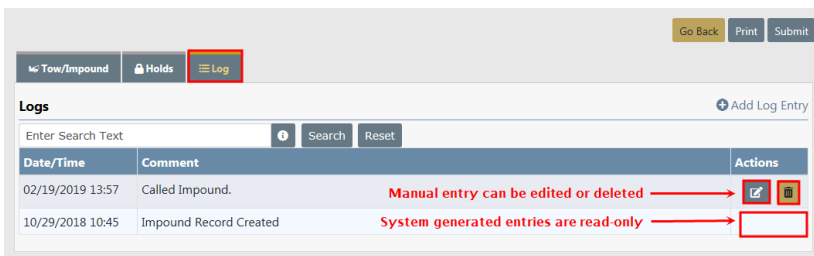
Date/Time	Comment	Actions
10/29/2018 10:45	Impound Record Created	







Optionally, click on **Add Log Entry** to create your own log entry, then enter **Comments** and the **Save** button.



You can edit or delete manual log entries; however, log entries generated by the system are read-only. Click the edit icon  to update the record, or click the trash icon  to delete.

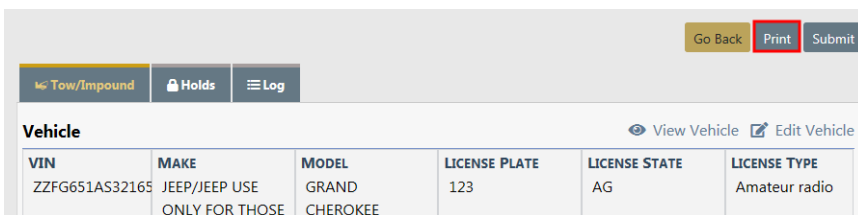


Date/Time	Comment	Actions
02/19/2019 13:57	Called Impound.	 
10/29/2018 10:45	Impound Record Created	 

## Print

You can print the *Vehicle Tow/Impound* record from the *Edit Impound* page. For instructions on accessing the *Edit Impound* page, refer to "Update Existing" on page 541.

Click the **Print** button on the top right of the window.



VIN	MAKE	MODEL	LICENSE PLATE	LICENSE STATE	LICENSE TYPE
ZZFG651AS32165	JEEP/JEEP USE ONLY FOR THOSE	GRAND CHEROKEE	123	AG	Amateur radio

The *Tow/Impound Print Options* window opens. Select the options you want to include in the report; green options are included and gray options are not.

**Tow/Impound Print Options**

Please select what information you would like to Print.

<input type="checkbox"/> TOW RELEASE	<input type="checkbox"/> GARAGE OWNER SECTION
<input type="checkbox"/> INVENTORY	<input type="checkbox"/> CUSTOM FIELDS
<input type="checkbox"/> PDF ATTACHMENTS	<input type="checkbox"/> IMAGE ATTACHMENTS
<input type="checkbox"/> TOWING COMMENTS	<input type="checkbox"/> RELEASE COMMENTS
<input type="checkbox"/> TOW SUMMARY COMMENTS	<input checked="" type="checkbox"/> REDACT DOBs

Click the **Print** button on the bottom right.

A PDF file downloads to your machine.

Click on the file to open the PDF in a new tab.

FOR OFFICIAL USE ONLY (FOUO) 212

**ABANDONED / IMPOUNDED VEHICLE REPORT**  
District 22, Ft Wayne

Hold <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		Reason for Hold		CAD number 1	
LOCATION AND DESCRIPTION OF ABANDONED / IMPOUNDED VEHICLE					
Street address and, if applicable, rental property name 1			County LaGrange County	City 1	Date Towed (mm/dd/yyyy) 09/08/2019 11:09 AM
Make JEEP/JEEP USE ONLY FOR THOSE MFD AFTER 1988 FOR OTHERS SEE JEEP OR AMERICAN MOTORS(JEEP)	Model GRAND CHEROKEE	Year 2015	Type Automobile / Passenger	Style Sedan, 4-door	Odometer 1
Color Top/Bottom Black	Misc ID 1	Vehicle Identification Number (VIN) 854SOXR0DXX			
Damage Burned	Damage Remarks 1				
Plate SOXROX	Plate State Illinois	Plate Month/Year - / 2016	License Type	As determined by: <input checked="" type="checkbox"/> Plate <input checked="" type="checkbox"/> VIN	
Person Last in Possession					
Owner					
Owner's Address (number and street)			City	State	ZIP Code
Disposition Unclaimed			Release Date 09/16/2019 11:46 AM		
TO BE PREPARED BY IMPOUNDING OFFICER					
Police Agency Name District 22, Ft Wayne	Is the total value of the vehicle \$1000 or more? No		Condition of Vehicle <input type="checkbox"/> Good <input checked="" type="checkbox"/> Fair <input type="checkbox"/> Poor		
Reason for the Tow:					

Click on the **Print** icon to print.

Click the **X** on the tab heading to close the tab.

# Chapter 30. Inventory and Assets

## Inventory Overview

**Inventory Management** allows an organization to designate storage locations and maintain on-hand stock items. A user-defined hierarchy and shared item descriptors provide the agency with a means to perform uniform data entry across the entire organization. Managers of these locations can assign items to officers, employees, locations, vehicles, and organizations. Additionally management capability allows officers, employees, and supervisors to manage and track issued equipment. Accountability is maintained for each transaction which creates a history within the module.

## Inventory Roles

There are three system-level inventory roles for the *Assets* and *Inventory* Modules:

- *Inventory Manager* role is given to any user who manages warehouse locations.
- *Inventory Sub-Manager* role is given to any user who is not a warehouse manager but who has control over non-warehouse (other) locations.

**NOTE:** The two roles above are mutually exclusive. That is, no user should have both roles at the same time.

- *Inventory Admin* role is given to the user who controls the administrative set-up of the module. (This role can be combined with the Inventory Manager role) In addition, four pre-existing roles (Officer, Officer Supervisor, CID User, and CID Supervisor) have been given the new permission categories prefixed with Inventory For Officers.

Anyone who uses inventory management should have the *Inventory – Basic Access* permission category in order to have the basic inventory functionality.

Two basic permission categories are:

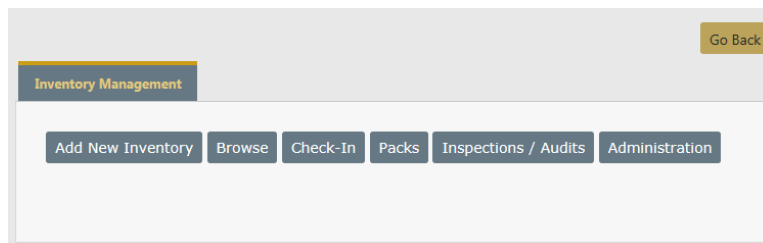
- Inventory – Show the Inventory Main Screen
- Inventory – Show the Officer Inventory Screen

**NOTE:** A user must have one of these to get started.

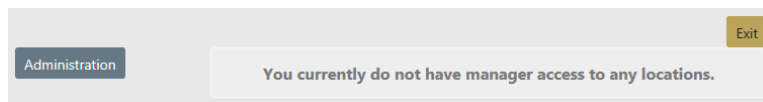
**NOTE:** Vehicle Make, Model, Type, and Styles share admin tables with the *Fleet Management Module*.

## Inventory Management Page

When the administration or setup portion of *Inventory Management* is complete, the **Inventory Management** page appears. For more information on **Inventory Administration** refer to your system administrator.



To gain access to the Inventory Management page, you must be assigned as a Location Manager. If you are not assigned as a Location Manager a message appears on the right stating you do not have manager access to locations. If you have Inventory\_Manager permissions, an **Administration** button also appears on the **Inventory Management** page.



If visible, click the **Administration** button, to open the **Inventory Administration** page to set up Location Manager. For more information on **Inventory Administration** refer to the *Caliber Online Administration Guide*.

If the **Administration** button is not visible, contact your system administrator.

## Add Inventory

**Add Inventory** allows you to add quantities to current items. Use the following procedures to add Inventory:

From the *Incident Management* page, select the **Add New Inventory** link to open the *Search For Existing Inventory* page.

The screenshot shows a web form titled "Advanced Search - Search For Existing Inventory". At the top right, there are two buttons: "Go Back" and "Add New Item". The form contains several input fields and dropdown menus:

- INVENTORY NUMBER: Text input field.
- STATUS: Dropdown menu with "-Select-" selected.
- AVAILABILITY: Dropdown menu with "-Select-" selected.
- UNIT #: Text input field.
- BARCODE: Text input field.
- SERIAL NUMBER: Text input field.
- MAKE: Text input field with a calendar icon.
- MODEL: Text input field with a calendar icon.
- EXPIRATION DATE FROM: Text input field with a calendar icon.
- EXPIRATION DATE TO: Text input field with a calendar icon.
- MAINTENANCE DATE FROM: Text input field with a calendar icon.
- MAINTENANCE DATE TO: Text input field with a calendar icon.
- SEARCH ON TYPE: Dropdown menu with "-Select-" selected.
- SEARCH ON CURRENT CUSTODY: Dropdown menu with "-Select-" selected.

At the bottom of the form, there are two buttons: "Reset" and "Search".

**NOTE:** The first step to adding inventory is always to search for existing inventory with descriptions that apply to the item(s) you want to add. This is to ensure that duplicate entries are not made. The goal is to locate and use existing entries to add additional quantities so that the same descriptors are shared across the entire organization.

Perform the search to display the Search Results page. For details refer to "Search for Existing Inventory" on the next page.

If there are no matches to your search then you need to add the new inventory. For details refer to "Add New Inventory" on page 561.

If the search results returns records, add the inventory to existing inventory. For details refer to "Add to Existing Inventory" on page 559

Your Search: **Make:Acme;** Previous | 1 | Next

<b>INVENTORY NUMBER</b> 123.4		<b>CATEGORY</b> Clothing - Pants - Class A - Teflon - Silver - Striped	<input type="button" value="Total On Hand: 437"/> <input type="button" value="Total Issued: 824"/>
<b>MAKE</b> Acme		<b>MODEL</b> Chaser	
<b>SIZE</b> 34 x 32	<b>LINE</b> Mens	<b>PRIMARY COLOR</b> Blue, Dark	<input type="button" value="Hand icon"/> <input type="button" value="Edit icon"/>
<b>SECONDARY COLOR</b> Blue, Dark			
<b>DESCRIPTION</b> Test description			
<b>QUANTITIES</b> One EQ Blister Pack contains 1 Case. One Case contains 1 items.			

## Search for Existing Inventory


From the *Incident Management* page, select the **Add New Inventory** link to open the *Search For Existing Inventory* page.

**Advanced Search - Search For Existing Inventory**

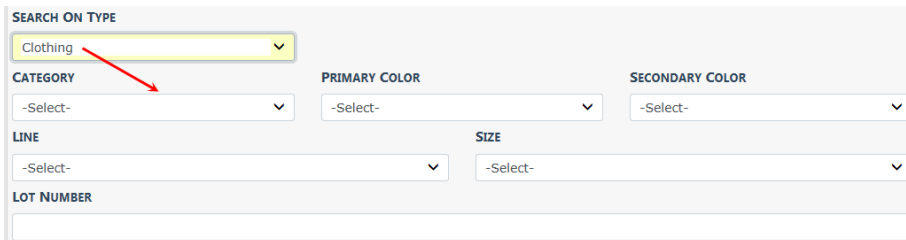
<b>INVENTORY NUMBER</b> <input type="text"/>	<b>STATUS</b> -Select- <input type="button" value="v"/>	<b>AVAILABILITY</b> -Select- <input type="button" value="v"/>
<b>UNIT #</b> <input type="text"/>	<b>BARCODE</b> <input type="text"/>	<b>SERIAL NUMBER</b> <input type="text"/>
<b>MAKE</b> <input type="text"/> <input type="button" value="Calendar icon"/>	<b>MODEL</b> <input type="text"/> <input type="button" value="Calendar icon"/>	
<b>EXPIRATION DATE FROM</b> <input type="text"/> <input type="button" value="Calendar icon"/>	<b>EXPIRATION DATE TO</b> <input type="text"/> <input type="button" value="Calendar icon"/>	
<b>MAINTENANCE DATE FROM</b> <input type="text"/> <input type="button" value="Calendar icon"/>	<b>MAINTENANCE DATE TO</b> <input type="text"/> <input type="button" value="Calendar icon"/>	
<b>SEARCH ON TYPE</b> -Select- <input type="button" value="v"/>		
<b>SEARCH ON CURRENT CUSTODY</b> -Select- <input type="button" value="v"/>		
<input type="button" value="Reset"/> <input type="button" value="Search"/>		

Complete as many of the fields in the Advanced Search section as you can.

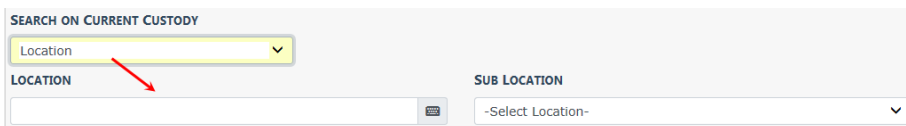
- The Inventory Number field is not required, and it only applies if your agency uses inventory numbers.
- Select/enter values for any of the fields for which you have information.

- Any field with an Auto Filter icon  to the right provides a list that matches your text. Begin typing in this field and it brings up a selection based on what you have typed. The fields that display **-Select-** contains a drop-down selection from which to choose. Click a selection to pull it into the field.

If you choose **Search On Type**, additional fields appear based on your selection.

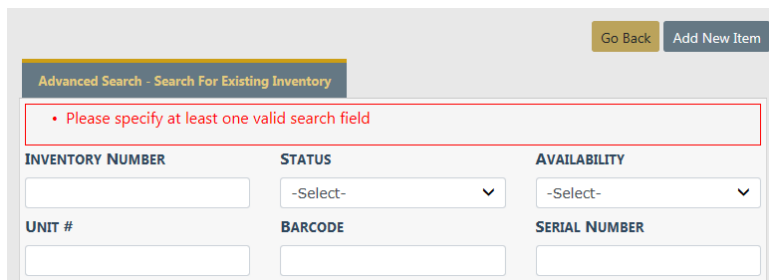


If you choose to **Search on Current Custody**, additional fields appear based on your selection.




Once you have made the selections, select **Search**.

If you select **Search** without entering a valid search field, the *Search For Existing Inventory* page displays with an error message as shown.



## Add to Existing Inventory

Once you have performed a search and the search results page returns, locate an item description that matches the item(s) you want to add to the inventory then select the  next to the item to add to the inventory.

Go Back

<b>INVENTORY NUMBER</b> 123.4		<b>CATEGORY</b> Clothing - Pants - Class A - Teflon - Silver - Striped	
<b>MAKE</b> Acme		<b>MODEL</b> Chaser	
<b>SIZE</b> 34 x 32	<b>LINE</b> Mens	<b>PRIMARY COLOR</b> Blue, Dark	
<b>SECONDARY COLOR</b> Blue, Dark			
<b>DESCRIPTION</b> Test description			
<b>QUANTITIES</b> One EQ Blister Pack contains 1 Case. One Case contains 1 items.			
<b>LOT NUMBER</b>		<b>UNIT PRICE</b>	
<input type="text"/>		<input type="text"/>	
<b>LOT DESCRIPTION</b> <input style="width: 100%; height: 20px;" type="text"/>			

Product Details And Quantity
Destination
Order
← Tabs

One EQ Blister Pack contains 1 Case. One Case contains 1 individual items.

<b># OF EQ BLISTER PACK</b>	<b># OF CASE</b>	<b>TOTAL ITEMS ENTERED</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>

**ENTER INDIVIDUAL ITEMS**

Save

Enter all the information you have available to include the Product Details and Quantity. Destination and Order Tabs. Select **Save**. You receive the message ensuring you that the new item(s) are being entered into the system .

Message From RMS

---

You are about to enter a total of 2 item(s) into the system.

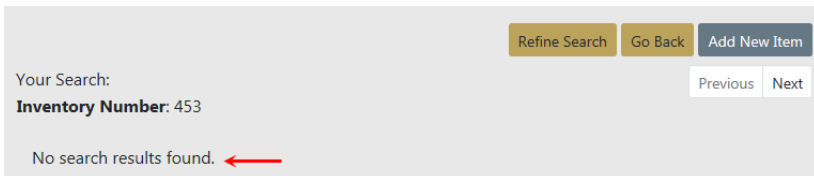
No Yes

Click **Yes** to enter the new items, or click **No** to return to the previous screen without entering the new items.



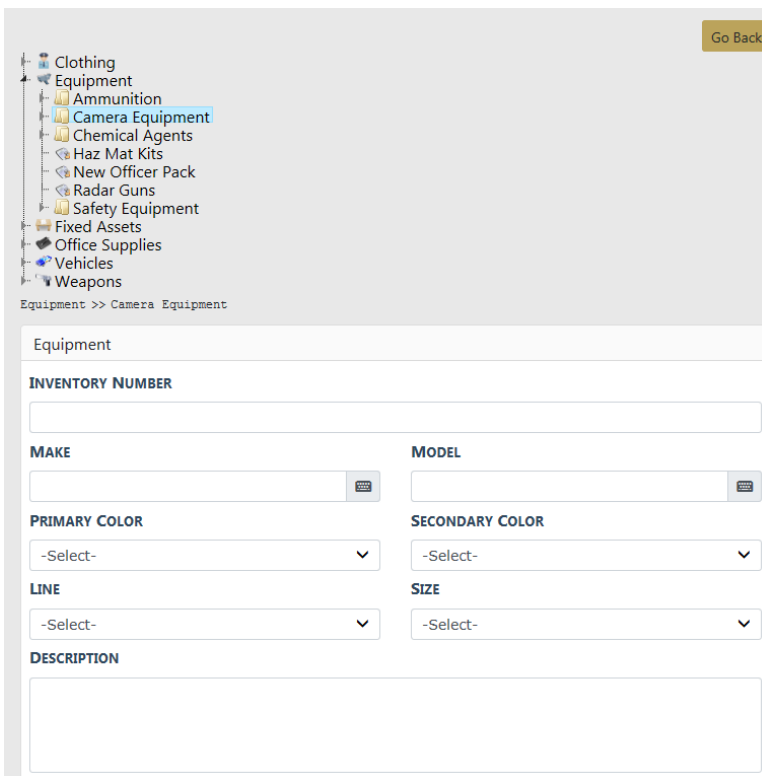
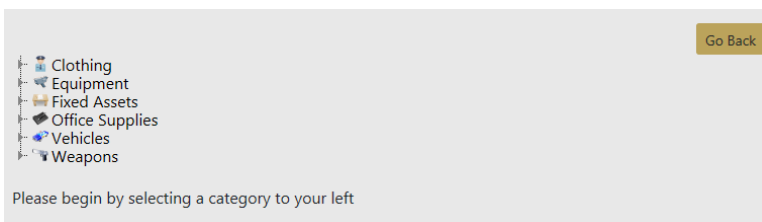
## Add New Inventory

If there is nothing in the system that matches your search, a *No search results found* message displays.



Add the new item by selecting the **Add New Item** button on the top right.

Begin by selecting a Category to your left.



Enter as much information regarding the new Inventory item.

Page down to fill in the *Product Details*, *Destination* and *Order* tabs. Required fields display a red border to the left of the field. Be sure to check all tabs for required fields. Any field with a red left-hand border is a required field. You must complete required fields to continue.

Once all information is entered for the New Inventory Item, select **Save**.

You receive a notification that you are about to enter an amount of items into the system, select **Yes** or **No**.

## Edit Entries

The inventory manager can edit entries in the inventory module. However, the manager must always be aware that item descriptors are shared so edits affect other agencies in the same organization.


- Editing Item Descriptors (shared): When adding new inventory the inventory manager searches to determine if the item descriptors already exist in Online RMS. If search results return a match, the manager selects item descriptors to add new quantity on-hand to update the warehouse. While reviewing the search results, the user can also edit item descriptors.

**NOTE:** Changes affect all entries across the entire organization. A warning banner displays across the top of the page if matching records exist.

There are a total of 11 items. Updating this record will update all of these items.

- Editing Item Details (not shared): While browsing existing inventory (stock on-hand), the manager can edit the on-hand detail specific to the warehouse. Fields open for edit include: Unit Number, Serial Number, Barcode Number, Expiration Date, Maintenance Date, Status, Usability, and the Disposed check box.

Log entries can be reviewed or created as needed per item. Custody history is also available for viewing and is updated automatically each time an event takes place

Select the  icon next to the item you wish to edit to display the edit page.

The screenshot shows the 'Item Properties' form with the following fields and values:

- INVENTORY NUMBER:** (Empty text box)
- CATEGORY:** Clothing - Pants - Class A - Teflon - Silver - S
- MAKE:** Acme
- MODEL:** PA340
- PRIMARY COLOR:** Black
- SECONDARY COLOR:** Black
- LINE:** Mens
- SIZE:** 13
- DESCRIPTION:** Uniform Shoes
- SELF CHECKOUT:**
- CONSUMABLE:**
- SERVICE LIFE:** 2 Years, 0 Months
- QUANTITY TYPE:** Box, **AMOUNT:** 0
- SUB-QUANTITY TYPE:** Pallet, **AMOUNT:** 0

Buttons: 'Update' (green), 'Exit' (orange)

Make the needed changes then select **Update**. A message appears across the top of the page letting you know the Inventory Item has been updated. Select **Exit**.

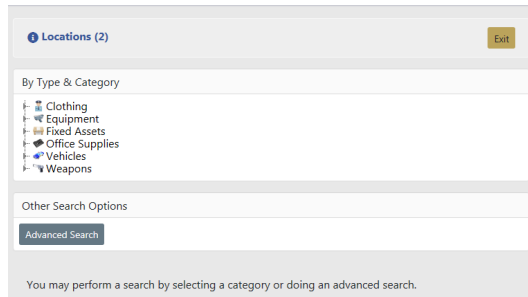
You may edit another item or elect to **Go Back** so you can search for another item to perform the same or a different task.

## Browse

Using the **Browse** feature, the inventory manager can search one or more warehouse locations by the type and category tree. (An advanced search is available for greater refinement.) The search results allow the inventory manager to select items to create a list. The inventory manager can then take action on the list, which is treated as a single group, and the selected action is applied to all items in the list. Actions available allow

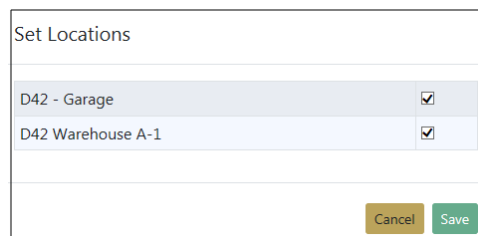
the inventory manager to assign items as needed to meet various needs. (Online RMS records each transaction as it occurs.)

From the *Inventory Management* page, click the **Browse** option to display the Browse screen.



The number of locations available to the current user is shown to the far left in the *Locations* banner near the top of the page.

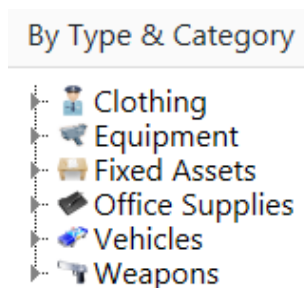
Click the blue information bubble icon to the left of *Locations* to set the locations.



To make the listed location available, ensure the box to the right is checked

To make the location unavailable, remove the check mark

Types are listed in the **By Type & Category** section in the upper left.



Categories are contained within the types folders.



The *Other Search Options* contains *Advanced Search*. Click on the **Advanced Search** button to view additional search fields.

Enter the search criteria then click the **Search** button to return results.

The screenshot shows the 'Locations (2)' interface. On the left is a 'By Type & Category' tree with options like Clothing, Coats, Footwear, Outerwear, Pants, Shirts, Shoes, Equipment, Fixed Assets, Office Supplies, Vehicles, and Weapons. Below it are 'Other Search Options' and an 'Advanced Search' button. The main area shows search results for 'Category: Clothing' and 'Locations: D42 - Garage, D42 Warehouse A-1'. Item details include: INVENTORY NUMBER 123.4, MAKE Acme, MODEL Chaser, SIZE 34 x 32, LINE Mens, PRIMARY COLOR Blue, Dark, and SECONDARY COLOR Blue, Dark. A 'QUANTITIES' section notes 'One EQ Blister Pack contains 1 Case. One Case contains 1 items.' At the bottom, there are input fields for selecting quantities for 'New' and 'Used' items, with a '1 Selected' indicator.

To select items from a category, type the quantity that you want to select in text field to the immediate left of the icon and click to display the number of items you want to select as shown in the partial example below.

This close-up shows the quantity selection interface for 'Location: D42 - Garage Pending Location'. It displays 'Lot # 123\_4-5' and two rows of input fields: '(Available) New:' and '(Available) Used:'. Each row has input boxes for '10 EQ Blister Pack', '10 Case', and '10 Total' (with a plus icon and '1 Selected' in red). The 'Used' row has input boxes for '5 EQ Blister Pack', '5 Case', and '5 Total' (with a plus icon).

When you have selected items, the number of items selected as well as the Take Action and Dispose option replace the No Selection label to the far right in the Location banner.

This close-up shows the location banner with a blue circle containing the number '1', a 'Take Action' button, and a 'Dispose' button.

You can click on the icon to display the *View Selected Items* page where you can delete individual items, Clear All Items, and/or Print your current selection. Select **Go Back** to return to the previous page.

The screenshot shows the 'View Selected Items' page. At the top right are buttons for 'Go Back', 'Clear All Items', and 'Print'. The item details are the same as in the previous screenshot. Below the details is a table with the following data:

Current Custody	Lot Number	Status	Usability	Expiration Date	Count	Actions
D42 - Garage Pending Location	123_4-5	New	Available		1	

Continue to browse and select items as needed.

When you have selected all the items you want to take a particular action on, click **Take Action** to display the *Inventory Management* page as shown.

The screenshot shows a web interface for inventory management. At the top right, there are 'Go Back' and 'Print' buttons. Below them is a 'Destination' section with several radio button options: 'Checkout to Location', 'Transfer to Other Warehouse', 'Transfer to Other Location', 'Checkout to Person', 'Checkout to Organization' (which is selected), 'Send to Vehicle', 'Create Pack', and 'Add To Pack'. Below the destination options is an 'ORGANIZATION' field with a dropdown arrow. Underneath is a 'CUSTODY NOTES' section with a large text area. The main part of the form is a table with the following data:

<b>INVENTORY NUMBER</b> 123.4		<b>MAKE</b> Acme	
<b>MODEL</b> Chaser		<b>SIZE</b> 34 x 32	<b>LINE</b> Mens
<b>PRIMARY COLOR</b> Blue, Dark	<b>SECONDARY COLOR</b> Blue, Dark		
<b>DESCRIPTION</b> Test description			
<b>QUANTITIES</b> One EQ Blister Pack contains 1 Case. One Case contains 1 items.			

At the bottom of the form is a table with columns: 'Current Custody', 'Lot Number', 'Status', 'Usability', 'Expiration Date', and 'Count'. The data row shows: 'D42 - Garage Pending Location', '123\_4-5', 'New', 'Available', and '1'. A 'Save' button is located at the bottom center of the form.

Select the appropriate radio button to indicate the destination of the item(s):

- Selection of Checkout to Location or Transfer to Other Location changes the display to include a field for selection of a Location.
- Selection of Checkout to Organization changes the display to include a field for selection of an Organization field.
- Selection of Checkout to Person changes the display to include a field for selection of an Officer / Employee.
- Selection of Transfer to Warehouse changes the display to include a field for selection of a Warehouse.
- Selection of Send to Vehicle displays the Select Vehicle window to allow selection of a vehicle.
- Selection of Create Pack changes the display to include additional fields to set up a pack.
- Selection of Add to Pack displays the Select Pack window to allow selection of a pack.

# Check In

The inventory check-in process allows the manager to search for and check-in items that have been checked out (assigned) to a person, location, organization, or vehicle. A printed receipt to formalize the process is also available should one be needed.

From the *Inventory Management* page, select **Check-In** to open the *Advanced Search - Checkin* page.

Perform a search to locate the item(s) you want to check in. Enter the number to checkin to the left of the item, then click the plus sign (+) to select.

Your Search: Refine Search Go Back Check In Previous 1 Next

**Category:** Clothing  
**Locations:** D42 - Garage, D42 Warehouse A-1

<b>INVENTORY NUMBER</b> 123.4	<b>MAKE</b> Acme	
<b>MODEL</b> Chaser	<b>SIZE</b> 34 x 32	<b>LINE</b> Mens
<b>PRIMARY COLOR</b> Blue, Dark	<b>SECONDARY COLOR</b> Blue, Dark	
<b>DESCRIPTION</b> Test description		
<b>QUANTITIES</b> One EQ Blister Pack contains 1 Case. One Case contains 1 items.		

**Location:** D42 - Garage Pending Location

**Lot # 123\_4-5**

(Available) New:  / 10 EQ Blister Pack  / 10 Case  / 10 Total **1 Selected**

(Available) Used:  / 5 EQ Blister Pack  / 5 Case  / 5 Total **+**

Select **Check In** to display the *Check In* page.



Go Back Print

DESTINATION LOCATION:  DATE: 02/21/2019 TIME: 1304

NOTES:

---

INVENTORY NUMBER: 123.4 MAKE: Acme

MODEL: Chaser SIZE: 34 x 32 LINE: Mens

PRIMARY COLOR: Blue, Dark SECONDARY COLOR: Blue, Dark

DESCRIPTION: Test description

QUANTITIES: One EQ Blister Pack contains 1 Case. One Case contains 1 Items.

Current Custody	Count	Lot #	Expiration Date	Status	Usability	Sub Location	Actions
OTHER LOCATION test	1	123_4-5		Used	Available	-Select Location-	<input checked="" type="radio"/> Check In All <input type="radio"/> Dispose All <input type="radio"/> Specify Groups

Check In

Complete the Destination Location field and other fields as needed. Select the applicable radio button in the *Actions* column.

When you choose to Dispose of an item(s) you are given the option to select the Disposition Method and enter any Disposition Comments, and click **Check In**.

Current Custody	Count	Lot #	Expiration Date	Status	Usability	Sub Location	Actions
OTHER LOCATION test	1	123_4-5		N/A	N/A	N/A	<input type="radio"/> Check In All <input checked="" type="radio"/> Dispose All <input type="radio"/> Specify Groups

Disposition Method:  Disposition Comments:

When you choose to Specify Groups **Add Entry** and **Add Disposal Entry** links appear. Click on the links to enter additional information.

Current Custody	Count	Lot #	Expiration Date	Status	Usability	Sub Location	Actions
OTHER LOCATION test	1	123_4-5		N/A	N/A	N/A	<input type="radio"/> Check In All <input type="radio"/> Dispose All <input checked="" type="radio"/> Specify Groups

Total Needing Entry: 1 [Add Entry](#) [Add Disposal Entry](#)

A notification appears at the top of the screen advising the **Check In** was successful.

**NOTE:** For items checked back into a specific location, the on-hand count increases and the current location updates.

## Packs

A **Pack** is a collection of items within a single grouping, i.e. initial issue. The **Pack** can then be checked out (assigned) as necessary.

**NOTE:** Before a new **Pack** can be created, the inventory manager must set up a pack category in the inventory tree under the appropriate type. (Pack categories can be set up under more than one type.) This is done via the *Inventory Setup* tab in the *Inventory Administration*.

From the *Inventory Management* page, select the **Packs** option to open the *Inventory Management – Manage Packs* page.

Pack Name	Category	Self Checkout	Description	Actions
Test B	Paper Stock	Yes	test	
Test Pack 1	Striped	Yes	Testing pack functionality	
Test A	Handguns	Yes	testing packs iteration 1	
Pack A-1	Pants	Yes	Testing packs	
Desk Pack	Desk Items	Yes	Pack to contain standard office supplies for an officer on administrative duty.	

Select the **Add Pack** button to open the *Manage Packs – Pack Details* page.

PACK NAME	TYPE
<input type="text"/>	Clothing
CATEGORY	SELF CHECKOUT
-Select-	<input type="checkbox"/>
DESCRIPTION	
<input type="text"/>	
<input type="button" value="Save"/>	

- Click in the Pack Name field and type a meaningful name to identify this grouping.
- In the Type field, select the type of inventory item to be grouped in this pack.
- In the Category field, select the appropriate pack category.
- If you want individuals to be able to check out this pack, click the Self Checkout box.
- In the Description field, type a brief description of the item.

- Select **Save** to return to the previous page where the new **Pack** now appears.

## Inspections / Audits

Online RMS allows users with the appropriate roles to create inspections/audits and maintain the records. The idea is to create each type of inspection/audit that the agency needs. Print the report and use it to record the results of an inspection or audit.

**NOTE:** An **Audit** is a count of items by type, location, custody, and so forth. An **Inspection** also provides information about the item(s). The printed paper report available from each instance of an inspection/audit is used to record the results of the inspection/audit. The content of the report is persistent (stays the same over time) unless edited.

From the *Inventory Management* page select **Inspections / Audits**.

The *Inspection Search* page appears.

This page displays first to allow you to locate any existing inspection reports that suit your purpose, and if none are available, use the **Add Inspection** link to create a new one.

If you know that you need to create a new inspection, there is no need to perform a search, click the **Add Inspection** button to open the *Inventory Management – Add Inspection* page and create a new inspection (audit).

You can search by Inspection Date or Next Inspection Date (use the calendar icon to specify a beginning and/or ending date), by Status (New, Completed, Canceled), or you can limit the search to only the inspections you have created by clicking the Limit to My Inspections box, or just click **Search** to return a list of all inspection records, which may be an extensive list.

Complete the fields to limit your search as needed, then click **Search** to display the *Inspection Search Results* page.

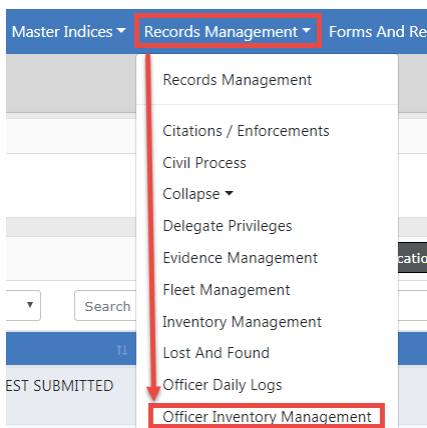
<span>Refine Search</span> <span>New Search</span> <span>Add Inspection</span>								
Id	Inspection Name	Search Notes	Agency	Inspection Date	Next Inspection Date	Status	Creator	Actions
117	Silver Striped Teflon Pants		District 42, Versailles	05/15/2017	07/01/2017	New	Homer Simpson	
108	Silver Striped Teflon Pants		District 42, Versailles	04/05/2013	07/01/2017	Cancelled	Homer Simpson	
113	Smith And Wesson		District 42, Versailles	04/05/2013	04/12/2013	New	Homer Simpson	

The icons in the *Actions* column allow you to edit the inspection (if you are the owner), print it, or review it. If an icon is not available to you, then you do not have permissions to perform that action.

## Officer Inventory Management

Use the following procedure to access the *Officer Inventory Management* module:

From the Home page, click the *Records Management* label then click on the Officer Inventory Management option to display a drop-down menu as shown.



Select the *Officer Inventory Management* option to display the *Inventory Management* page as shown below. There are four tabs available:

- View My Stock
- Self Check Out
- Self Check In/Transfer
- Dispose Consumable Items

Go Back

View My Stock Self Check Out Self Check In / Transfer Dispose Consumable Items

Quick Checkout: Select a Location and/or Sub Location

- D42 - Garage >
- D42 - Other >
- D42 Warehouse A-1 >
- D42 Warehouse B.1 >
- D42 Warehouse C\_1 >

**NOTE:** Depending upon your agency's configuration set-up and your roles and permissions, the options displayed may vary.

Select **View My Stock** to open the view *My Stock – Search Results* page.

Go Back

Your Search:  
Officer: Christine Saur #SAUR111 - District 42, Versailles

INVENTORY NUMBER DL88-1		MAKE Acme	
MODEL SL100		SIZE 34 x 32	LINE Mens
PRIMARY COLOR Black	SECONDARY COLOR Aluminum, Silver		

Officer: Christine Saur #SAUR111 - District 42, Versailles

Lot # DL10788-1

Unit #	Serial #	Barcode	Status	Usability	Next Maintenance Date	Actions
DL88-1	107881	10788X-1	New	Out of Service	03/11/2013	
DL88-2	107882	10788X-2	New	Available	03/11/2013	

This allows the Officer/Employee to view the items that have been issued or checked out to them.

## Self Checkout

The **Self Checkout** feature addresses the need for specific items to be available on a routine basis. To maintain accountability, items designated by the inventory manager for **Self Checkout** can be checked out and in without manager intervention from **Self Checkout** locations. For example, if hand held radar units were assigned to a patrol room and designated as available for **Self Checkout**, any officer on any shift can check the radar out and back in as needed.

[Go Back](#)

**SELECT A LOCATION**

- D42 - Garage
- D42 - Other
- D42 Warehouse A-1
- D42 Warehouse B.1
- D42 Warehouse C\_1

**INVENTORY NUMBER**

**STATUS**

**AVAILABILITY**

**UNIT #**

**BARCODE**

**SERIAL NUMBER**

**MAKE**

**MODEL**

**EXPIRATION DATE FROM**

**EXPIRATION DATE TO**

**MAINTENANCE DATE FROM**

**MAINTENANCE DATE TO**

**SEARCH ON TYPE**

[Reset](#) [Search](#)

In order to **Self Checkout** an item(s), the inventory manager must make the location of the item available for **Self Checkout**. At a minimum, a location must be selected prior to selecting **Search**. Define the search as needed, select **Search**.

[Refine Search](#) [Go Back](#) [Finish Checkout](#)

Your Search:  
**Self Checkout Only:** Yes  
**Location:** D42 Warehouse A-1

[Previous](#) 1 [Next](#)

<b>INVENTORY NUMBER</b> 123.4		<b>MAKE</b> Acme				
<b>MODEL</b> Chaser		<b>SIZE</b> 34 x 32	<b>LINE</b> Mens			
<b>PRIMARY COLOR</b> Blue, Dark	<b>SECONDARY COLOR</b> Blue, Dark					
<b>DESCRIPTION</b> Test description						
<b>QUANTITIES</b> One EQ Blister Pack contains 1 Case. One Case contains 1 items.						
<b>Location:</b> D42 Warehouse A-1 Room A-1						
<b>Lot #</b> IA911						
Unit #	Serial #	Barcode	Status	Usability	Next Maintenance Date	Actions
48517	746822	948127	New	Available	02/20/2013	

Using the icon, select the item(s) you wish to **Self Checkout**.

Once your selections are complete, select **Finish Checkout**.

Enter any Checkout Notes then select **Check Out**.

[Go Back](#)

DATE: 02/21/2019      TIME: 10/10/2019

CHECKOUT NOTES

INVENTORY NUMBER  
10-7-88-2

Current Custody	Unit #	Serial #	Barcode	Status	Next Maintenance Date
D42 Warehouse A-1 Room A-1	48517	746822	948127	New	02/20/2013

[Check Out](#)

A confirmation message appears. Select the appropriate response.

Message From RMS

Confirm Checkout?

[No](#)   [Yes](#)

## Self Check In / Transfer

From the *Inventory for Officers* page, select **Self Check In / Transfer** to open the *Transfer Items - Search Results*.

The only items available on this screen are those that you had first Self Checked-Out.

[Refine Search](#)   [Go Back](#)   [Finish Transfer](#)

Your Search:  
Self Checkout Only: Yes  
Officer: Christine Saur #SAUR111 - District 42, Versailles

Previous   1   Next

INVENTORY NUMBER DL88-1		MAKE Acme	
MODEL SL100		SIZE 34 x 32	LINE Mens
PRIMARY COLOR Black	SECONDARY COLOR Aluminum, Silver		

Officer: Christine Saur #SAUR111 - District 42, Versailles

Lot # DL10788-1

Unit #	Serial #	Barcode	Status	Usability	Next Maintenance Date	Actions
DL88-1	107881	10788X-1	New	Out of Service	03/11/2013	<a href="#">+</a> <a href="#">🔗</a>
DL88-2	107882	10788X-2	New	Available	03/11/2013	<a href="#">+</a> <a href="#">🔗</a>

Using the [+](#) icon, select the item you wish to **Self Check-In/Transfer**. Once you have made all the selections, select **Finish Transfer**.

Check-in to Location
  Transfer to Person
 Go Back

OFFICER / EMPLOYEE

DATE: 02/21/2019 TIME: 1018

NOTES

INVENTORY NUMBER: DL88-1 MAKE: Acme

MODEL: SL100 SIZE: 34 x 32 LINE: Mens

PRIMARY COLOR: Black SECONDARY COLOR: Aluminum, Silver

Current Custody	Unit #	Serial #	Barcode	Status	Usability	Note
Christine Saur #SAUR111 - District 42, Versailles	DL88-2	107882	10788X-2	New	Available	

Complete Transfer

Choose either **Check-In to a Location** or **Transfer to a Person**. Add any notes then select **Complete Transfer**.

You are brought back to the *Inventory for Officers* page.

## Dispose Consumable Items

From the *Officer Inventory Management* page, select **Dispose Consumable Items** to open *Inventory Search - Dispose*.

Go Back

INVENTORY NUMBER:

STATUS:

AVAILABILITY:

UNIT #:

BARCODE:

SERIAL NUMBER:

MAKE:

MODEL:

EXPIRATION DATE FROM:

EXPIRATION DATE TO:

MAINTENANCE DATE FROM:

MAINTENANCE DATE TO:

SEARCH ON TYPE:

Reset Search

Complete as many fields as you can to narrow your search. Click **Search**.

Click to select the items to dispose and click **Finish Disposal**.



# Chapter 31. Fleet Management

## Overview

The **Fleet Management** module provides the ability to manage ownership costs and service maintenance activities for agency vehicles and equipment assigned for officers' use. Use this module to manage crash reports, track mileage and costs, maintenance history, what is due for maintenance, and submit or manage service requests for needed maintenance or repairs.

This module is available with full subscription access to Online RMS. It is disabled by default but can be enabled, and additional user training is available for purchase. Contact Caliber Public Safety Support for more information.

**Fleet Management** can be configured specific to your agency's needs, such as an eligible list of equipment and service types, service vendors, allowable vehicle types and categories, inspection types, and more. Refer to the *Online RMS Administrator Guide* for details.

## Fleet Management Permission Categories

There are four permission categories tied to the Fleet Management module:

- **Fleet Managers** have the authority to access the Fleet Management Dashboard, create or view fleet vehicles, edit all fleet vehicles and equipment records, manage crash reports, approve service requests, manage vehicle assignments they have created, and create and edit service maintenance records.

If given the *always-edit assignment* permission, Fleet Managers can edit assignments that were created by other users.

If given the *always-edit fuel & Oil* permission, Fleet Managers can edit fuel/oil/mileage records that were created by other users.

Fleet Managers can delete vehicles, only if given specific permissions.

- **Mid-Level Managers** have all the permissions that the Fleet Manager has, with the exception of being able to edit the primary vehicle fields or any custom fields associated with the vehicle.
- **Fleet Officers** view fleet vehicles and equipment currently or previously assigned to them, assign themselves to existing vehicles, create fuel & oil and service requests on vehicles to which they are appointed.
- **Fleet Clerk** views fleet vehicles and add fuel & oil records with mileage, and edit records only if you are the creator and only if within lock hours.
- **Application Administrators** configure the set-up of the module, such as define the eligible list of equipment and service types, vehicle types and categories, service vendors, inspection types, and more. Refer to the *Online RMS Administrator Guide* for details.

Permission categories can be assigned to any role to allow the agency to best manage user access to application modules.

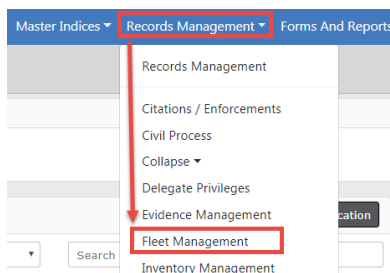
The person with the **Fleet Manager** permission category could also be an **Application Administrator**, or it could be two different people.

**NOTE:** Vehicle Make, Model, Type, and Styles for Fleet Vehicles share admin tables with the *Inventory and Asset Module*. Configure these values at the Organization level. The *Inventory and Asset Module* must be enabled, and the **Application Administrators** must also have the **Inventory\_Manager** role. Refer to the *Inventory and Asset* section of the *Online RMS Administrator Guide* for details.

## Fleet Manager

### ***Fleet Management Dashboard***

Click on the **Records Management** menu to access the **Fleet Management Dashboard**, an interactive user interface used as a launching pad for viewing and managing fleet data.

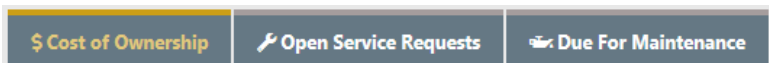


A screenshot of the Fleet Management Dashboard. At the top, there are buttons for 'Go Back', 'Manage Crashes', 'Manage Vehicles', and 'Manage Equipment'. Below these are three tabs: '\$ Cost of Ownership', 'Open Service Requests', and 'Due For Maintenance'. The '\$ Cost of Ownership' tab is active. The dashboard includes a search bar with 'Agency' set to 'All Agencies' and 'Assignment' set to '-Select-'. Below the search bar is a table with the following columns: Unit #, Vehicle Type, Vehicle Make, Vehicle Model, Vehicle Category, Total Miles/Hours, Total Cost, Cost Per Mile/Hour, Total Hours Down, and Vehicle Status. The table contains five rows of data.

Unit #	Vehicle Type	Vehicle Make	Vehicle Model	Vehicle Category	Total Miles/Hours	Total Cost	Cost Per Mile/Hour	Total Hours Down	Vehicle Status
1		HONDA/AMERICAN HONDA MOTOR CO, INC(HOND)	PILOT		77,788	\$0.00	\$0.00	0	Available
100	Automobile	TOYOTA(TOYo)	4Runner		-25,330	\$6,062.00	(\$0.24)	0	Available
111	Automobile	PORSCHE(PORS)	911		14,767	\$2,991.00	\$0.20	0	Assigned
123		HONDA/AMERICAN HONDA MOTOR CO, INC(HOND)	PILOT		0	\$2.00	\$0.00	16	Assigned
123	Automobile	HONDA/AMERICAN HONDA MOTOR CO, INC(HOND)	PILOT	Patrol Marked	13,700	\$1,451.12	\$0.11	13	Assigned

The **Fleet Management Dashboard** consists of several features:

1. There are three tabs that contain existing vehicle information. Data within these tabs are read-only; capable of being displayed, but not changeable:



The active tab is a slightly different color than the other tabs.

### Cost of Ownership

- The total cost (purchase price + fuel and oil costs + maintenance and repair costs), total mileage or hours on the vehicle, and the cost per mile or hour. The dashboard defaults to this tab.

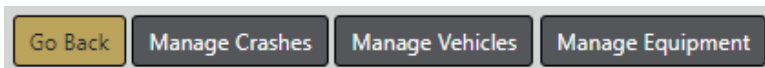
### Open Service Requests

- Vehicles tied to submitted maintenance requests that are pending completion.

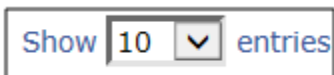
### Due for Maintenance

- Vehicles that meet set criteria since the last performed service maintenance.

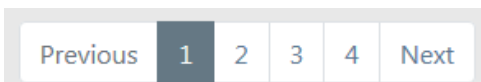
2. Four buttons on the top right of the window:



- Click the **Manage Crashes** button to add, update, or delete fleet crash reports. For details refer to "Manage Fleet Crash Reports" on page 583.
  - Click the **Manage Vehicles** button to add, update, or delete vehicles. For details refer to "Manage Vehicles" on page 601.
  - Click the **Manage Equipment** button to add, update, or delete equipment associated with vehicles. For details refer to "Manage Equipment" on page 595.
  - Click the **Go Back** button to return to the dashboard.
3. You can change the number of entries that appear in the grid. Click on the **Show Entries**  and select 10, 25, 50 or 100. The default is 10.

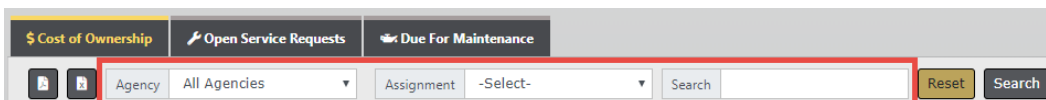


4. The bottom of the window displays the number of entries and it allows you to navigate between pages.



The highlighted number is the page currently being viewed. Click **Next** to advance to the next page, or click the page number you want to view. Click on **Previous** to view the previous page.

5. Each tab allows you to filter the grid data that appears in the grid. Depending on permissions you can filter by agency, assignments, and a specific word or phrase.



- a. Click on the tab you want to view, if different than the default **Cost of Ownership**.
- b. Select one, two, or all three search options:
  - If applicable, optionally select an **Agency** from the list. The results list immediately displays only records pertaining to that selection.
  - Optionally, select an **Assignment** from the list. The results list immediately displays only records pertaining to that selection.

- Optionally, enter text into the **Search** box, then click the **Search** button or press **Enter** to display only records matching the entered text. The displayed list dynamically changes based on the entered text.

Search text example:

On the **Cost of Ownership** tab enter *Chev* in the text box, then click **Search** or press **Enter** to show only records containing *Chev*. Change the text to *Impala* then click **Search** or press **Enter** to display only records containing *Impala*.

Search  Search Reset Show 10 entries

Unit #	Vehicle Type	Vehicle Make	Vehicle Model	Vehicle Category	Total Miles/Hours	Total Cost	Cost Per Mile/Hour	Total Hours Down	Vehicle Status
123456789		CHEVROLET(CHEV)	COBALT		16,000	\$1,116.00	\$0.07	0	Assigned
ddd		CHEVROLET(CHEV)	IMPALA		15,020	\$0.00	\$0.00	0	Assigned
dmm3		CHEVROLET(CHEV)	CAMARO	Van	1,200	\$0.00	\$0.00	0	Available
27		CHEVROLET(CHEV)			0	\$0.00	\$0.00	0	Available
50	Automobile	CHEVROLET(CHEV)		Patrol Unmarked	0	\$1,010.00	\$0.00	20	Available

Showing 1 to 5 of 5 entries

Previous 1 Next

Search  X Search Reset Show 10 entries

Unit #	Vehicle Type	Vehicle Make	Vehicle Model	Vehicle Category	Total Miles/Hours	Total Cost	Cost Per Mile/Hour	Total Hours Down	Vehicle Status
ddd		CHEVROLET(CHEV)	IMPALA		15,020	\$0.00	\$0.00	0	Assigned

Showing 1 to 1 of 1 entries

Previous 1 Next

**NOTE:** Click the **Reset** button to remove the entered search text and list all available records.

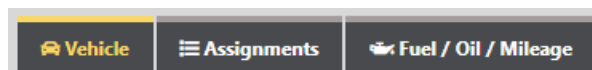
- c. Click on the **Unit ID** to open the *View Fleet Vehicle* window for detailed information about that particular vehicle.

Unit #	Vehicle Type	Vehicle Make	Vehicle Model	Vehicle Category
123456789		CHEVROLET (CHEV)	COBALT	
<input type="text" value="ddd"/>		CHEVROLET (CHEV)	IMPALA	
dmm3		CHEVROLET (CHEV)	CAMARO	Van

The screenshot shows a web application interface with three tabs: "Vehicle", "Assignments", and "Fuel / Oil / Mileage". The "Vehicle" tab is selected and highlighted with a red box. In the top right corner, there is a "Go Back" button. Below the tabs, the "Fleet Vehicle Information" section contains a table with the following data:

AGENCY District 42, Versailles	VEHICLE ID 28	
YEAR 2008	MAKE CHEVROLET(CHEV)	MODEL IMPALA
VIN	TYPE	STYLE
LICENSE # 5656	LICENSE STATE	
PRIMARY COLOR	SECONDARY COLOR	
DESCRIPTION		
STATUS Assigned	UNIT NUMBER ddd	CATEGORY
ASSIGNMENT	GROUP	BUDGET
RATING	FUNDING VENDOR	
PURCHASE DATE	PURCHASE PRICE	PURCHASE FROM
PURCHASE COMMENT		

The *View Fleet Vehicle* window contains three tabs:



### Vehicle

- Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. The *View Fleet Window* opens to this tab by default as shown in the above image.

### Assignments

- A history of officers assigned to the vehicle, along with the dates.

### Fuel/Oil/Mileage

- Summarization of fluid types and the dates and costs with mileage.

- Click on the **Back** button to return to the **Dashboard**. For your convenience, this button is located on the upper right of the window and on the lower center of the window; either will return you to the **Dashboard**.

## Manage Fleet Crash Reports

The **Manage Crashes** button on the **Fleet Management Dashboard** allows Fleet Managers to *Search, Add, Edit, or Delete* fleet crash report data.

To update or delete crash reports you must first search for the crash record. Depending on permissions, the search results provide the option to update, delete, or view the crash data. The search page also provides the option to create a new crash report.

**NOTE:** The **Manage Crashes** button only appears if you have appropriate permissions.

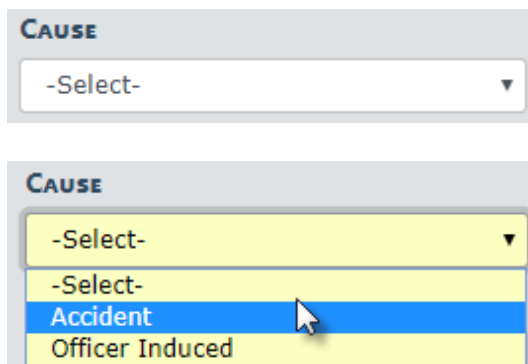
### Search Fleet Crash Reports

1. Click on the **Manage Crashes** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. The *Crash Search* screen appears. Enter various pieces of information about the crash report such as, status, cause, dates, crash report number, vehicle id, etc.


**NOTE:** The Agency of the crash report defaults to the Fleet Manager's agency; however, with proper permissions you can change it to any agency within your organization by selecting from the drop down list.

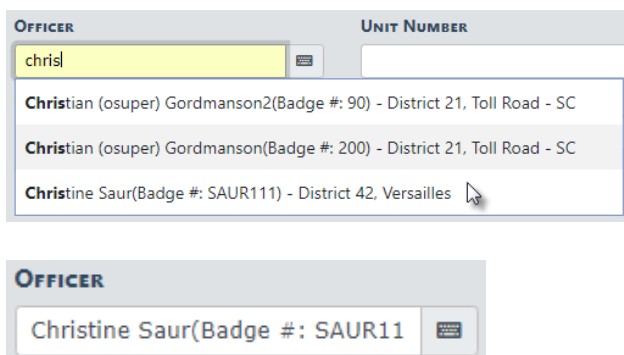
To add a crash report, click the **Add Crash** button on the top right of the screen. For instructions on adding a crash report refer to "Add Crash Report" on the next page.

The fields with **-Select-** supply a specific list from which to choose. For example, to search for a **Cause** click in the field and select from the drop down list.



The image shows two screenshots of a web form. The top screenshot shows a dropdown menu labeled 'CAUSE' with the text '-Select-' and a downward arrow. The bottom screenshot shows the same dropdown menu with the list expanded. The list contains four items: '-Select-', '-Select-', 'Accident', and 'Officer Induced'. The 'Accident' item is highlighted in blue, and a mouse cursor is pointing at it.

The fields with an  on the right supply a list of available values based on data you type in the field. For example, click into the **Officer** field and type a portion of the officer's name to view a list that matches your entered text, then click on an option from the list to populate the Officer field.








**NOTE:** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

Select any applicable check boxes that apply to the search. For example, select **On Traffic Stop** to search for crash report that pertain to traffic stops.

3. Either click **Reset** to clear all fields to start over, click **Go Back** to return to the Fleet Management dashboard, click **Search** to display a list of existing crashes that match the entered data.

If you selected **Search**, the results display in a grid.

Crash Report #	Officer	Unit #	Vehicle ID	Crash Date / Time	Summary	Agency	Status	Cause	Preventable?	Actions
005-20		DM123	57	03/03/2020 1358		District 35, Evansville	Open		No	 
004-20		123	60			District 42, Versailles	Open		No	 

Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over. Click on the Crash Report Number of the crash record to view details, or click on the **View** icon  on the right.

4. To export the search results to a file, refer to "Export Search Results" on page 31.

### Add Crash Report

Fleet Managers, with proper permissions, have the ability to add crash reports to fleet vehicles.

There are two ways to initiate a new crash report:

- From the *Crash Search* page.




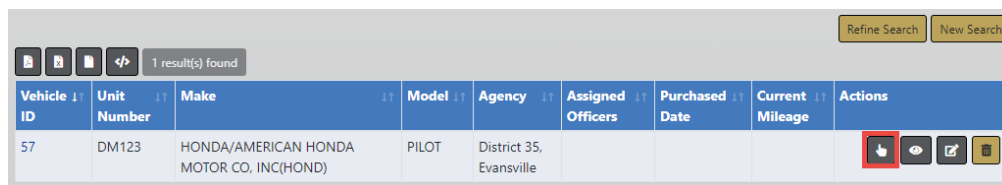
- From the fleet vehicle record.





Perform the following steps to add a crash report:

1. Access the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. Choose one of the following methods to initiate a new crash report:

**From the Crash Search page:**


- a. Click on the **Manage Crashes** button on the **Fleet Management Dashboard** to open the *Crash Search* page.
- b. Click on the **Add Crash** button.
- c. The *Vehicle Search* page opens.
- d. Search for the vehicle record that you want to associate with the crash report. For more information on searching for a vehicle record, refer to "Search Vehicles" on page 601.
- e. Click the *Select* icon  on the appropriate vehicle record in the results grid to add the vehicle to the new crash report.

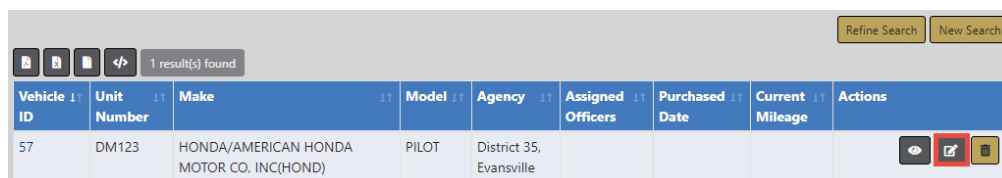





Vehicle ID	Unit Number	Make	Model	Agency	Assigned Officers	Purchased Date	Current Mileage	Actions
57	DM123	HONDA/AMERICAN HONDA MOTOR CO. INC(HOND)	PILOT	District 35, Evansville				   

- f. The *Edit Crash* page opens.

**From the Fleet Vehicle:**

- a. Click on the **Manage Vehicle** button on the **Fleet Management Dashboard** to open the *Vehicle Search* page.
- b. Search for the vehicle record that you want to associate with the crash report. For more information on searching for a vehicle record, refer to "Search Vehicles" on page 601.
- c. In the *Fleet Vehicle Search Results* grid, click the *Edit* icon  on the vehicle you want to associate with the new crash report.



Vehicle ID	Unit Number	Make	Model	Agency	Assigned Officers	Purchased Date	Current Mileage	Actions
57	DM123	HONDA/AMERICAN HONDA MOTOR CO. INC(HOND)	PILOT	District 35, Evansville				  

- d. The *Edit Vehicle* page opens.

- e. On the *Edit Vehicle* page, **page down** to the *Crashes* section of the fleet vehicle record.

Crashes <span style="float: right;">+ Add Crash</span>								
Crash Report #	Crash Type	Crash Cause	Status	Officer	Preventable	Crash Date / Time	Summary	Actions
010-20			Open		No			
005-20			Open	Livingwell, Charles, ID# 2014	No	03/03/2020 1358		

- f. Click on the **Add Crash** link located on the top right of the *Crashes* section.
  - g. Click on the **Yes** button when asked if you want to continue.
  - h. The *Edit Crash* page appears.
3. Enter the relevant information on the *Edit Crash* page, then click **Update**.

For more information on the *Edit Crash* page, refer to "Edit Crash Report" on the facing page.

### Delete Crash Report

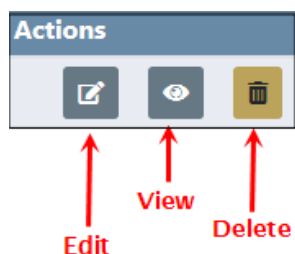
To delete a crash report you must first **Search** for the crash report. The **Search Results** will provide the option to delete.

1. Click on the **Manage Crashes** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. The *Crash Search* screen appears. Search for the crash report you want to delete. For instructions on how to search, refer to "Search Fleet Crash Reports" on page 583.


Example of search results:

2 result(s) found <span style="float: right;">Refine Search New Search</span>										
Crash Report #	Officer	Unit #	Vehicle ID	Crash Date / Time	Summary	Agency	Status	Cause	Preventable?	Actions
005-20		DM123	57	03/03/2020 1358		District 35, Evansville	Open		No	
004-20		123	60			District 42, Versailles	Open		No	

The icons on the right allow you to *Edit*, *View*, or *Delete*.



**NOTE:** If you do not see the delete icon, then you do not have appropriate permissions to do so.

3. Click on the trash icon  to delete the appropriate equipment. The confirmation screen appears.

A confirmation dialog box with a white background and a thin border. It has a title bar that says 'Message From RMS'. Below the title bar is a text area containing the question 'Are You Sure?'. At the bottom right of the dialog are two buttons: 'No' and 'Yes'.

4. Click **Yes** to delete or **No** to return to the results window without deleting.

### Edit Crash Report

Fleet Managers, with proper permissions, have the ability to edit crash reports.

There are two ways to access the *Edit Crash* page:

- By searching for a specific crash report using the *Crash Search* page.
- From the fleet vehicle itself.

Perform the following steps to edit a crash report:

1. Access the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. Choose one of the following methods to access the *Edit Crash* page:

#### From the *Crash Search* page:

- a. Click on the **Manage Crashes** button on the **Fleet Management Dashboard**.
- b. The *Crash Search* screen appears. Search for the crash report you want to update. For instructions on how to search, refer to "Search Fleet Crash Reports" on page 583.

Search results example:

Refine Search New Search

4 result(s) found

Crash Report #	Officer	Unit #	Vehicle ID	Crash Date / Time	Summary	Agency	Status	Cause	Preventable?	Actions
007-20	Gordmanson2, Christian (osuper), ID# 90	dmm3	55	03/05/2020 1222		District 42, Versailles	Open		No	
005-20	Livingwell, Charles, ID# 2014	DM123	57	03/03/2020 1358		District 35, Evansville	Open		No	
006-20	Evidence2, Employee, ID# 654321	1abc	59	02/29/2020 1221		District 42, Versailles	Open		No	
004-20	Officer Supervisor, Gordmanson, Christian (osuper), ID# 70	123	60	02/29/2020 1211		District 42, Versailles	Open		Yes	

Refine Search New Search

**From the Fleet Vehicle:**

- a. Search for the vehicle and click the edit icon to update the vehicle record. For more information on searching for a vehicle record, refer to "Edit Vehicles " on page 607.
- b. On the *Edit Vehicle* screen, page down to the *Crashes* section of the fleet vehicle record.

Add Crash

Crash Report #	Crash Type	Crash Cause	Status	Officer	Preventable	Crash Date / Time	Summary	Actions
010-20			Open		No			
005-20			Open	Livingwell, Charles, ID# 2014	No	03/03/2020 1358		

3. Click the edit icon on the crash report you want to update. The *Edit Crash* form opens.

Go Back

**Vehicle Information**

VEHICLE ID 57	AGENCY District 35, Evansville	UNIT NUMBER DM123	YEAR 2018
MAKE HONDA/AMERICAN HONDA MOTOR CO, INC(HOND)	MODEL PILOT	STYLE	CATEGORY Patrol Marked
VIN 12345	LICENSE #	CURRENT MILEAGE 0	ASSIGNMENT

**Crash Details**

CRASH REPORT # 005-20	TOTAL COST \$0.00	STATUS Open
AGENCY District 35, Evansville	CRASH DATE / TIME 03/03/2020 1358	CRASH DAY OF WEEK TUESDAY
CRASH TYPE -Select-	HOURLY GROUP -Select-	COUNTY -Select-
CRASH CAUSE -Select-	PURSUIT? <input type="checkbox"/>	ON TRAFFIC STOP? <input type="checkbox"/>
PREVENTABLE? <input type="checkbox"/>		

The screenshot shows a web interface for vehicle information. At the top is a 'SUMMARY' section with a large empty text area. Below this is the 'Location Details' section, which includes an 'Update' button and an 'Add Location' link. The 'Officer' section shows 'NAME' as 'Livingwell, Charles, ID# 2014' and includes 'Change Officer' and 'Remove Officer' links. Below the officer section are several other sections: 'Incidents' with an 'Associate Incident' link, 'References' with an 'Add Reference' link, 'Insurance' with an 'Add Insurance' link, 'Service / Maintenance Records' with an 'Add Service/Maintenance Record' link, 'Crash Towing' with an 'Add Towing' link, and 'Attachments' with an 'Add Attachment' link.

**NOTE:** Data in the *Vehicle Information* section comes directly from the fleet vehicle record and cannot be modified.

**NOTE:** **Total Cost** is read-only and it calculates automatically: Tow costs + service/maintenance costs.

### Crash Details

1. Modify the necessary information in the *Crash Details* section, then click the **Update** button to save.

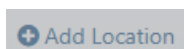
**NOTE:** Fields that are grayed-out cannot be modified. Fields with the left red bar are required.

### Location

1. Optionally, search for and choose an existing address.

**NOTE:** The location must exist in the Master Address Index. If the location doesn't exist, with proper permissions, you can add it to the Master Address Index then select the newly added record. For more information on Master Index, refer to "Master Indices Overview" on page 71.

- a. Click **Add Location** to open *Location Search*.



**Address** Add Address

**QUICK SEARCH** Street #, Direction, Street Name, Street Type, City, State, Zip Quick Search

STREET #  To  DIRECTION  STREET NAME  TYPE

DIRECTION SUFFIX  SUB TYPE  SUB #

CITY  STATE  ZIP

COMMON PLACE NAME  REPORTING AREA  INDEX ID

CREATOR  CREATION DATE FROM  CREATION DATE TO

COMMENTS

**Intersection**


STREET #  DIRECTION  STREET NAME  STREET TYPE

PHONETIC  SEARCH PREFERENCE **ALL ANY**

ADDITIONAL SEARCH CRITERIA



- b. Enter as much information as possible to find the address record, then click the **Search** button to display results that match your entered criteria.

For more information on searching address records, refer to the *Address Search* section of "Searching Master Records" on page 75.

- c. Click on the select icon  to select the appropriate address record that appears in the grid.

**Location Search Results** Refine Search New Search Add Address

1 result(s) found

Street #	Dir	Street Name/Type	Dir Suffix	Sub Type	Sub #	City/State	Zip	Common Place	Reporting Area	Geo Verified	Index ID	Actions
123		Cherry, Lane				Golden, IN				Yes	1690	 

Refine Search New Search

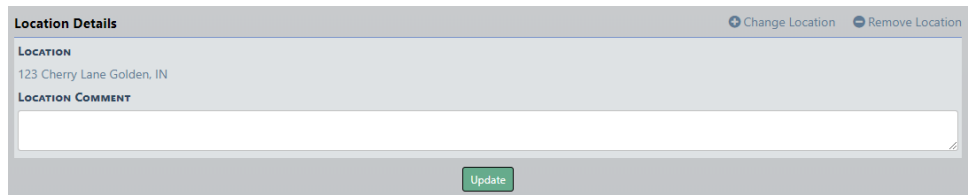
**When address you need does not exist:**

When the address you are looking for does not exist in the system, you can, with appropriate permissions, add the record then select it.

Click on the **Add Address** button on the top right to add a new address record. If the button does not appear on your screen, then you do not have appropriate permissions.

For more information on adding an address record, refer to "Adding Address" on page 94.

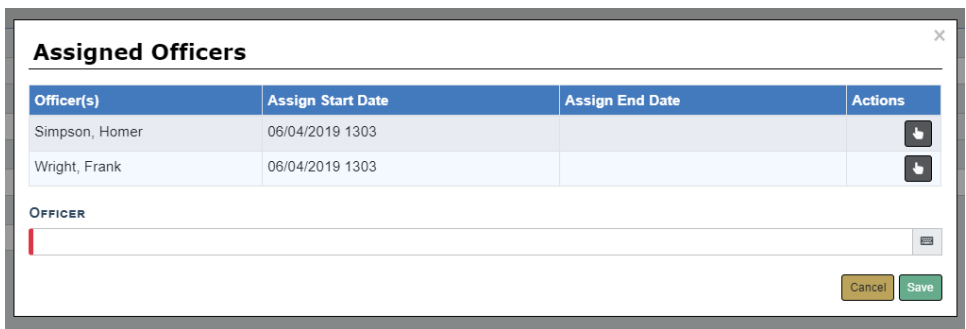
d. The address is added to the *Location Details* grid of the Crash Report.



- e. Optionally, enter **Location Comments** then click on the **Update** button to save.
- f. Click the **Change Location** link to change the address, if applicable. The link open the *Address Search* form.
- g. Click the **Remove Location** link to remove the location and location comment from the grid, if applicable. Then confirm deletion.

**Officer**

- 1. Click on the **Assign Officer** link.
- 2. The *Assigned Officers* windows appears.



Officers assigned or previously assigned to the vehicle the past twelve months appear in the list.


- 3. Select the appropriate officer from the list provided, or find and select another officer by entering the name in the Officer field.
- 4. Click **Save**.

To remove an Officer, click on the delete icon then confirm deletion.

**Associate Incident**

- 1. If applicable, click on the **Associate Incident** link to associate the crash report with an incident.
- 2. The *Incident Search* window opens. Enter the search criteria and click the **Search** button to display the results, then select the appropriate incident from the results grid.

For more information on searching for incidents, refer to "Incident Search" on page 223.

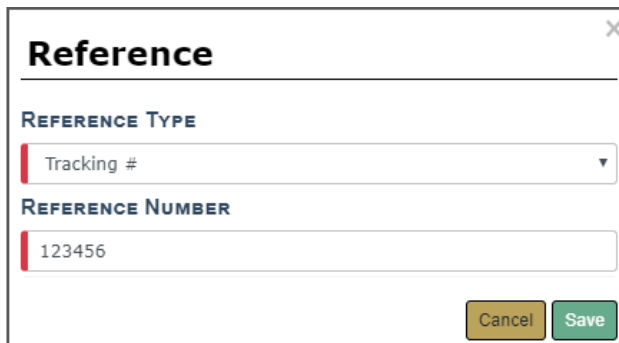
3. To remove an associated incident from the crash report, click the delete icon  then confirm deletion.

If the delete icon is not present, then you do not have appropriate permissions.



**NOTE:** This removes the association to the incident from the crash report; it does not remove the incident from the system.

## References

1. If applicable, click on the **Add Reference** link to include a reference.



The image shows a dialog box titled "Reference" with a close button (X) in the top right corner. Inside the dialog, there are two sections: "REFERENCE TYPE" with a dropdown menu currently showing "Tracking #" and a downward arrow, and "REFERENCE NUMBER" with a text input field containing "123456". At the bottom right of the dialog are two buttons: "Cancel" and "Save".

2. Select the **Reference Type**.
3. Enter the **Reference Number**.
4. Click **Save** to add it to the crash report.
5. To edit a reference record, click on the edit icon , make changes, then click **Save**.
6. To delete a reference record, click on the delete icon , then click **Yes** to confirm deletion.

## Insurance

1. If applicable, click on the **Add Insurance** link to add insurance to the crash report. The *Insurance* window opens.
2. Enter the information, then click **Save**.



## Service/Maintenance Records

1. If applicable, click on the **Add Service/Maintenance** link to add service/maintenance to the crash report. The *Service/Maintenance* window opens.
2. Enter the values into the Service/Maintenance window.

**Service / Maintenance**

MILEAGE/HOURS ODOMETER  
54154

START DATE  
11/05/2020

SELECT VENDOR  SPECIFY VENDOR  
Warner truck stop

INVOICE NUMBER  
451

HOURS DOWN  
2

SERVICE COST  
\$80.00

COMMENTS  
Replace two windshield wipers.

RESET SERVICE INTERVAL MILEAGE

Cancel Add Details Save

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

For vendor, **Select Vendor** from a list or click **Specify Vendor** enter your own.

3. Click **Save** to create the **Service Maintenance** record, **Cancel** to return to the **Edit Fleet Vehicle** window without saving, or click **Add Details** to add **Service Repair** records.
4. If you chose to **Add Details**, the *Edit Service Record* appears.

**Service/Maintenance Information**

MILEAGE/HOURS ODOMETER: 55121      ESTIMATED COST:      INVOICE NUMBER: 545

SERVICE COST: \$65.00      SUPPLEMENTAL COST: \$0.00      TOTAL COST: \$0.00

HOURS DOWN: 1      TECHNICIAN:       SELECT VENDOR     SPECIFY VENDOR

Vendor: Warner truck stop



COMMENTS: Oil Change

START DATE: 02/05/2020      END DATE:      COMPLETION DATE:

Buttons: Go Back, Save

Links: Add Service Repair, Add Attachment

**NOTE:** Items specific to crash reports:

- Maintenance records created within a crash report are only visible within the crash report, not in the Service Maintenance grid on the fleet vehicle itself.
  - Costs associated with service maintenance records within a crash report are not included in the Cost of Ownership on the fleet vehicle itself.
  - Mileage associated with the service maintenance records within a crash report are not used when determining Next Service Mileage and Next Service Date on the fleet vehicle itself.
5. To edit an existing service/maintenance record on the crash report, click on the edit icon , make changes, then click **Save**.
  6. To delete a service/maintenance record from the crash report, click on the delete icon , then click **Yes** to confirm deletion.

### Crash Towing

1. If applicable, click on the **Add Towing** link to add towing to the crash report. A *Vehicle Towing* window opens.
2. You can **Select Company** then choose from a drop-down list, or **Add Company** and complete the necessary information.

**Vehicle Towing**

SELECT COMPANY  ADD COMPANY

**COMPANY NAME**  
Lake Towing Company

**ADDRESS**  
300 Miami Trail Road

**CITY**  
Lowell

**STATE**  
Indiana

**ZIP**  
46356

**PHONE**  
800 - 555 - 3333

**DRIVER**  
Robin Poharczyk

**REFERENCE NUMBER**  
12345



**TOW DATE**  
03/02/2020

**Tow Cost**  
\$75.00

**COMMENTS**

Cancel Save

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

3. Click **Save** to add the towing record to the crash report.
4. To edit an existing towing record on the crash report, click on the edit icon , make changes, then click **Save**.
5. To delete a towing record from the crash report, click on the delete icon , then click **Yes** to confirm deletion.

### Attachments

1. If applicable, click on the **Add Attachment** link to attach a photo or document to the crash report.

For more information on adding attachments, refer to "Add Attachments" on page 59.

For general information about attachments, refer to "Attachments Overview" on page 59.

### Manage Equipment

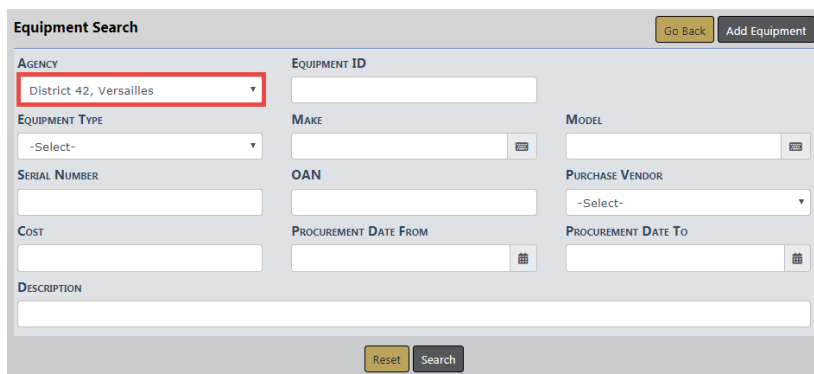
The **Manage Equipment** button on the **Fleet Management Dashboard** allows Fleet Managers to *Search*, *Add*, *Edit*, and *Delete* equipment data. Equipment examples are handcuffs, shotguns, radar guns, etc.

To update or delete equipment you must first search for the equipment record. The search results will provide the option to update, delete, or view the equipment data.

### Search Equipment

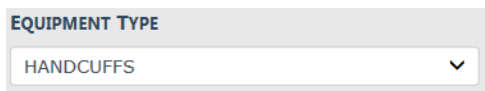
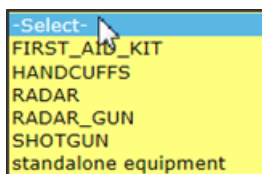
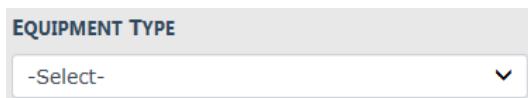
1. Click on the **Manage Equipment** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. The **Fleet Equipment Search** screen appears. Enter various pieces of information about the equipment such as, equipment type, make, model, etc.

**NOTE:** The Agency of the equipment defaults to the Fleet Manager's agency; however, with proper permissions you can change it to any agency within your organization by clicking on the  .




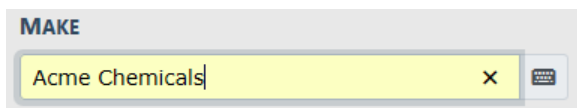
To add equipment click the **Add Equipment** button. For instructions on adding equipment refer to "Add Equipment " on the facing page.

The fields with **-Select-** supply a specific list from which to choose. For example, to search for the **Equipment Type Handcuffs**, click on the  and a list will appear, then click *Handcuffs* from the list.



**NOTE:** Equipment Types are unique per Organization.

The fields with an  on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *Acme* to view a list of *Acme* options from which to choose, then click on the option you want and it appears in the **Make** field.




**NOTE:** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

3. Either click **Reset** to clear all fields to start over, click **Back** to return to the Fleet Management dashboard, click **Search** to display a list of existing equipment that matches the entered data, or **Add Equipment** to add the equipment to the database.

If you selected **Search**, the results display in a grid. The example below is a search result for **Equipment Type Handcuffs** and **Agency District 42, Versailles**.

Equipment Id	Type	Make	Model	Agency	Active	Actions
22	HANDCUFFS	Acme Chemicals	GAS-1 mask	District 42, Versailles	true	
19	HANDCUFFS	Smith And Wesson	Focus	District 42, Versailles	true	
17	HANDCUFFS	911 Gear	Camaro	District 42, Versailles	true	
14	HANDCUFFS	Ruger	Focus	District 42, Versailles	true	

Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over. Click on the Equipment ID of the equipment record to view details, or click on the *View* icon  on the right.

4. To export the search results to a file refer to "Export Search Results" on page 31.

### Add Equipment

Fleet Managers have the ability to add equipment to the Fleet Management module by way of the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 578.

1. Click on the **Manage Equipment** button on the **Fleet Management** dashboard.
2. The **Fleet Equipment Search** screen appears. Before adding the equipment, it is recommended you first search for the equipment to verify whether or not it already exists, though not required. For instructions on how to search for equipment refer to "Search Equipment " on the previous page.

- 3. Click on the **Add Equipment** button on the **Fleet Equipment Search** window. Enter the Equipment information in the fields provided.

- The **Agency** of the equipment defaults to the Fleet Manager's agency; however, you can change it to any agency within the organization by clicking on the  .
- The fields with **-Select-** supply a specific list from which to choose. For example, to search for the **Equipment Type Handcuffs**, click on the  and a list will appear, then click *Handcuffs* from the list.

**NOTE:** Equipment Types are unique per Organization. The list of available **Styles** dynamically changes based on the chosen **Type**.

- The fields with an  on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *Acme* to view a list of *Acme* options from which to choose, then click on the option you want and it appears in the **Make** field.

**NOTE:** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

**NOTE:** The list of available **Models** dynamically changes based on the chosen **Make**.

4. Click **Save** to create the Equipment record, or click **Go Back** to return to the **Fleet Equipment Search** screen without creating the record.

When you select **Save**, the **Edit Equipment** screen displays.

5. Click **Go Back** to return to the **Fleet Equipment Search** screen.

### Delete Equipment

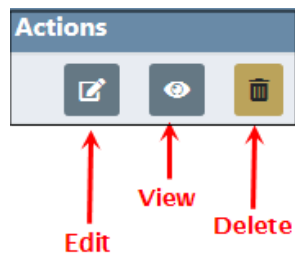
To delete equipment you must first **Search** for the equipment. The **Search Results** will provide the option to delete the equipment data.

1. Click on the **Manage Equipment** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. The **Fleet Equipment Search** screen appears. Search for the equipment you want to delete. For instructions on how to search for equipment refer to "Search Equipment" on page 596.

The results below are based on a search for equipment type Radar.

Equipment Id	Type	Make	Model	Agency	Active	Actions
27	RADAR	RADAR CO	Lazer	District 42, Versailles	true	[Edit] [View] [Delete]
20	RADAR	Smith And Wesson	Focus	District 42, Versailles	true	[Edit] [View] [Delete]

The icons on the right allow you to *Edit*, *View*, or *Delete*.



- Click on the trash icon to *Delete* the appropriate equipment. The following confirmation screen appears.

Message From RMS

---

Are You Sure?







- Click **Yes** to delete or **No** to return to the results window without deleting.

### Edit Equipment

To edit equipment you must first **Search** for the equipment. The **Search Results** will provide the option to edit the equipment data.

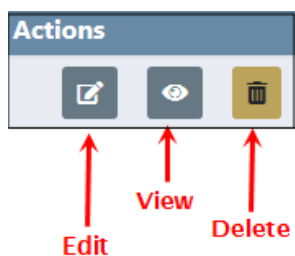
- Click on the **Manage Equipment** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
- The **Fleet Equipment Search** screen appears. Search for the equipment you want to update. For instructions on how to search for equipment refer to [FleetManagerManageEquipSearch.htm](#).

The results below are based on a search for equipment type Radar.

Equipment Id	Type	Make	Model	Agency	Active	Actions
27	RADAR	RADAR CO	Lazer	District 42, Versailles	true	  
20	RADAR	Smith And Wesson	Focus	District 42, Versailles	true	  

The icons on the right allow you to *Edit*, *View*, or *Delete*.





3. Click the *Edit* icon on the equipment record you want to update and the **Edit Equipment** form opens.

4. Modify the necessary information then click the **Update** button to save.
5. Click **Go Back** to return to the **Fleet Equipment Search** screen.


## Manage Vehicles

The **Manage Vehicles** button on the **Fleet Management Dashboard** allows Fleet Managers to *Search, Add, Edit, and Delete* vehicle data.


To update or delete vehicles you must first search for the vehicle. The search results provide the option to update, delete, or view fleet vehicle data.

### Search Vehicles


1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. The **Fleet Vehicle Search** screen appears. Enter various pieces of information about the vehicle, such as VIN, Make, Model, etc.

**NOTE:** The Agency of the vehicle defaults to the Fleet Manager's agency; however, with proper permissions you can change it to any agency within the organization by clicking on the .

To add a vehicle click **Add Vehicle**. For details refer to "Add Vehicles " on page 604.

The fields with **-Select-** supply a specific list from which to choose. For example, to search for a vehicle **Type** of *Automobile* click on the  and a list will appear, then click *Automobile* from the list and it appears in the field.

**NOTE:** The list of available **Styles** dynamically changes based on the chosen **Type**.

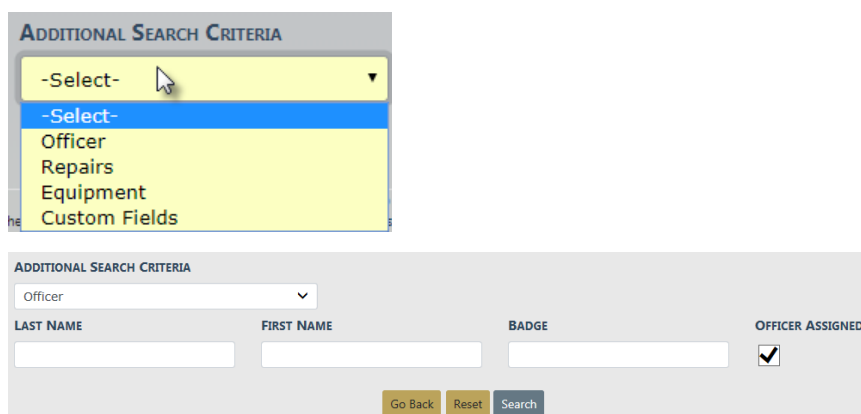
The fields with an  on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *chev* to view a list of *chev* options from which to choose, then click on the option you want and it appears in the **Make** field.

**NOTE:** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

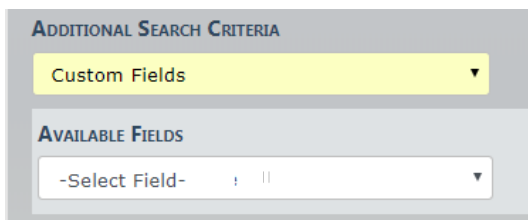
**NOTE:** The list of available **Models** dynamically changes based on the chosen **Make**.

Check the **Vehicle Not Assigned** checkbox to search for vehicles that have not been assigned.

You can also reduce your search results by including **Additional Search Criteria**, along with your other search parameters or by themselves, by using the drop-down list at the bottom left of the *Fleet Vehicle Search* screen. For example, you can search for all *Chevrolet* vehicles assigned to officers by selecting **Officer** in the **Additional Search Criteria** drop-down, then select **Officer Assigned** when the *Officer* window appears. **Officer Assigned** turns to green from gray when selected. Click **Search** to display the results or click **Reset** to begin the search over.



You can search **Custom Fields** if configured by your agency. The **Available Fields** appear; click in the field and choose from the drop-down list.



**Note:** Custom Fields is available for agencies that have the Custom Fields feature enabled. Custom Fields captures data defined by the agency. For more information refer to your administrator.

3. When the search results display, either click **Refine Search** to update your current search criteria or click **New Search** clear all fields to start over.

Click on the Vehicle ID of the vehicle record to view details, or click on the *View* icon on the right.

4. To export search results to a file refer to "Export Search Results" on page 31.

### Add Vehicles

Fleet Managers have the ability to add vehicles to the Fleet Management module by way of the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 578.

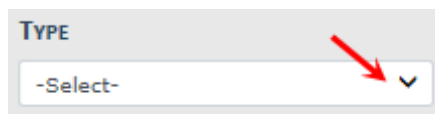
1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard.
2. The **Fleet Vehicle Search** screen appears. Before adding the vehicle, it is recommended you first search for the vehicle to verify whether or not it already exists, though not required. For instructions on how to search for vehicles refer to "Search Vehicles " on page 601.
3. Click on the **Add Vehicle** button on the **Fleet Vehicle Search** window to open the **Add Fleet Vehicle** screen. Enter the Vehicle information in the fields provided.

The screenshot shows a web form for adding a vehicle. It is organized into several sections. The top section includes a 'Go Back' button and an 'AGENCY' dropdown menu. Below this are rows for 'YEAR', 'MAKE', and 'MODEL'. The next row contains 'VIN', 'TYPE', and 'STYLE'. The following row has 'LICENSE #', 'LICENSE STATE', and 'PRIMARY COLOR'. The next row has 'SECONDARY COLOR' and 'DESCRIPTION'. The 'STATUS' dropdown is set to 'Available'. Below that are 'ASSIGNMENT', 'RATING', 'PURCHASE DATE', 'PURCHASE COMMENT', 'UNIT NUMBER', 'GROUP', 'FUNDING VENDOR', 'PURCHASE PRICE', 'PURCHASE FROM', 'WARRANTY EXPIRE DATE', 'STARTING MILEAGE', and 'STARTING HOURS'. Fields with a red vertical bar on the left are required.

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

**NOTE:** Custom Fields, if applicable, do not appear until after you add required fields and select the **Save** button. Once the screen refreshes, the custom fields appear for filling in.

- The **Agency** of the vehicle defaults to the Fleet Manager's agency; however, with appropriate permissions you can change it to any agency within the organization by clicking on the .
- The fields with **-Select-** supply a specific list from which to choose. For example, to search for a vehicle **Type** of *Automobile* click on the  and a list will appear, then click *Automobile* from the list and it appears in the field.



**NOTE:** The list of available **Styles** dynamically changes based on the chosen **Type**.

- The fields with an  on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *chev* to view a list of *chev* options from which to choose, then click on the option you want and it appears in the **Make** field.



**NOTE:** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

**NOTE:** The list of available **Models** dynamically changes based on the chosen **Make**.

- You can enter the **Starting Mileage** or **Starting Hours** at time of purchase. This value is used in determining mileage or hours used on the vehicle.

**NOTE:** The **Status** is required when adding a new vehicle record. Examples are *Assigned*, *Out of Service*, and *Available*; though will vary by agency.

4. Click **Save** to create the Vehicle record, or click **Go Back** to return to the **Fleet Vehicle Search** screen without creating the record.

When you select **Save**, the **Edit Fleet Vehicle** screen displays.

**Fleet Vehicle Information**

AGENCY: District 42, Versailles

VEHICLE ID: 66

YEAR: 2018

MAKE: TOYOTA(TOYo)

MODEL: Highlander

VIN: 987YYYY

TYPE: -Select-

STYLE: -Select-

LICENSE #: YYY123

LICENSE STATE: California

PRIMARY COLOR: -Select-

SECONDARY COLOR: -Select-

DESCRIPTION:

STATUS: Assigned

UNIT NUMBER: D123

CATEGORY: -Select-

ASSIGNMENT: -Select-

GROUP: -Select-

BUDGET: -Select-

RATING: -Select-

FUNDING VENDOR: -Select-

PURCHASE DATE:

PURCHASE PRICE:

PURCHASE FROM: -Select-

There are three tabs: *Vehicle*, *Assignments*, and *Fuel and Oil*; vehicle information, assignment history of the vehicle, and fuel & oil history, respectively. For managing the information in these tabs refer to "Edit Vehicles " on the facing page.

While on the *Vehicle* tab, page down to view or add additional vehicle information in grid format such as attachments, service requests, insurance, inspections, etc. The same general procedure is used for all grid topics, though information will vary. For general instructions refer to "Add a Service Request " on page 617.

TEST

Equipment ➕ Add Equipment

Equipment Type	Assign Date	Assign End Date	Comments	Actions
RADAR	01/27/2020			

Crashes ➕ Add Crash

Crash Report #	Crash Type	Crash Cause	Status	Officer	Preventable	Crash Date / Time	Summary	Actions
001-20			Open	Cid Detective. Harrison, Benjamin (cid), ID# 306	No			
002-20			Open		No			

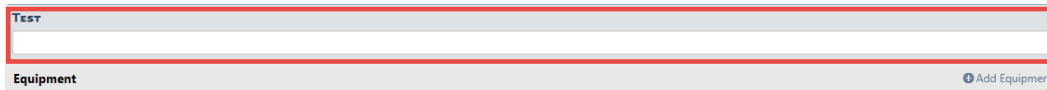
Miscellaneous IDs ➕ Add Miscellaneous ID

Service Requests ➕ Add Service Request

Type	Status	Request Date	Description	Actions
Equipment	Pending	11/22/2019		

Service / Maintenance Records ➕ Add Service/Maintenance Record

**NOTE:** Custom Fields, if applicable, appear on the screen immediately above the grid section on the *Vehicle* tab. The custom field Test is used as an example.

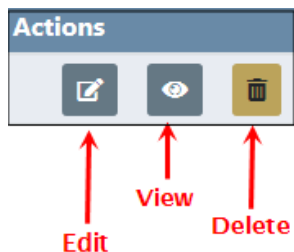


**Delete Vehicles**

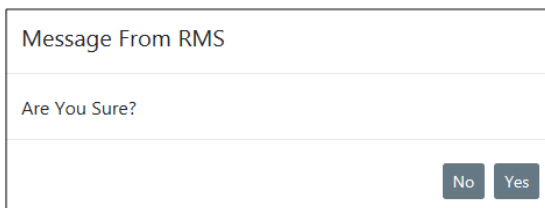
This applies to users with permissions to delete vehicles.

To delete vehicles you must first **Search** for the vehicle. The **Search Results** will provide the option to delete the vehicle data.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. Search for the vehicle you want to delete, then in the search results window click the *Delete* icon on the vehicle record you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles " on page 601.




3. A confirmation window appears. Click **Yes** to delete or **No** to return to the search results window without deleting.

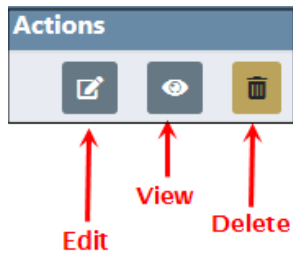


**NOTE:** If the vehicle is assigned to an officer, the option to delete is not allowed.

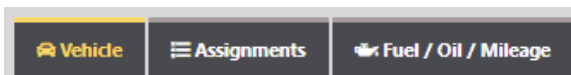
**Edit Vehicles**

To edit vehicles you must first **Search** for the vehicle. The **Search Results** will provide the option to edit the vehicle data.

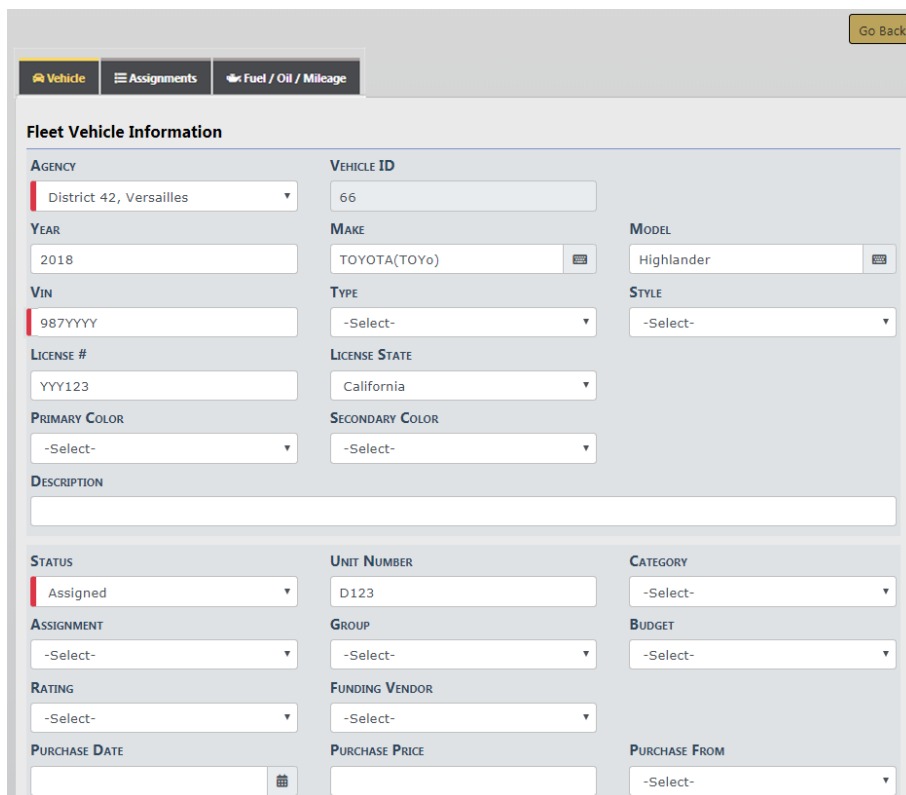
1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. Search for the vehicle you want to update, then in the search results window click the *Edit*  icon on the vehicle record you want to update. For instructions on how to search for vehicles refer to "Search Vehicles " on page 601.



3. The **Edit Fleet Vehicle** form opens with three tabs that contain vehicle information, past and current officers assigned to the vehicle, and fuel/oil/mileage history.



4. The **Vehicle** tab opens by default. You can update, add or delete various vehicle information.



The image shows a screenshot of the "Fleet Vehicle Information" form. At the top right is a "Go Back" button. Below it are three tabs: "Vehicle", "Assignments", and "Fuel / Oil / Mileage". The form contains several input fields and dropdown menus:

- AGENCY: District 42, Versailles
- VEHICLE ID: 66
- YEAR: 2018
- MAKE: TOYOTA(TOYo)
- MODEL: Highlander
- VIN: 987YYYY
- TYPE: -Select-
- STYLE: -Select-
- LICENSE #: YYY123
- LICENSE STATE: California
- PRIMARY COLOR: -Select-
- SECONDARY COLOR: -Select-
- DESCRIPTION: (empty text area)
- STATUS: Assigned
- UNIT NUMBER: D123
- CATEGORY: -Select-
- ASSIGNMENT: -Select-
- GROUP: -Select-
- BUDGET: -Select-
- RATING: -Select-
- FUNDING VENDOR: -Select-
- PURCHASE DATE: (empty date field)
- PURCHASE PRICE: (empty text field)
- PURCHASE FROM: -Select-



CURRENT MILEAGE/HOURS 131,001	LAST DATE OF MILEAGE/HOURS	MILEAGE/HOURS DRIVEN 20,001
COST OF OWNERSHIP \$0.00	NEXT SERVICE MILEAGE/HOURS 0	NEXT SERVICE DATE

Read-only section, calculated by Online RMS

dsadas

TEST

Custom Field example

Equipment

**NOTE:** Custom Fields, if applicable, appear on the screen immediately above the grid section on the *Vehicle* tab. The custom field Test is used as an example.

**NOTE:** Cost of Ownership does not include service maintenance records created within a crash report, and

**NOTE:** Be aware of the following crash report items:

- Maintenance records created within a crash report are only visible within the crash report, not in the Service Maintenance grid on the fleet vehicle itself.
- Costs associated with service maintenance records within a crash report are not included in the Cost of Ownership on the fleet vehicle itself.
- Mileage associated with the service maintenance records within a crash report are not used when determining Next Service Mileage and Next Service Date on the fleet vehicle itself.

Click the **Go Back** button to return to the **Fleet Vehicle Search Results** window, if you wish.

5. Modify the necessary vehicle information on the top half of the form, then click the **Update** button to save.

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

6. Add, edit, or delete additional vehicle information that appears in grids below the **Update** button.

**Add Additional Vehicle Information**

- a. To add, click on the **+** button in the grid next to the item you want to add. Enter the necessary data in the window that appears.

For example, to add Inspection data, click on the **+** button next to *Add Inspection* and the following window appears:

The image shows a modal window titled "Inspection" with a close button (X) in the top right corner. It contains the following fields:

- TYPE**: A dropdown menu with "-Select-" selected.
- STATUS**: A dropdown menu with "-Select-" selected.
- REFERENCE NUMBER**: A text input field.
- COMMENTS**: A larger text input area.
- INSPECTION DATE**: A date picker showing "03/15/2019".

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

- b. Enter the necessary data then click **Save** to add, or **Cancel** to exit and return to the previous screen.

**Edit Additional Vehicle Information**

- a. Click on the edit icon to the right of the item you want to update.

The image shows a table titled "Inspections" with a header row and one data row. The header row includes columns for Type, Status, Inspection Date, Comments, and Actions. The data row shows "Safety" as the type, "Pass" as the status, "12/04/2018" as the date, and "Tested for safety and it passed, but must be retested in the near future." as the comment. In the Actions column, there are two icons: a pencil (edit) and a trash can (delete). A red arrow points to the pencil icon.

Type	Status	Inspection Date	Comments	Actions
Safety	Pass	12/04/2018	Tested for safety and it passed, but must be retested in the near future.	[Edit] [Delete]

- b. An Inspection window appears displaying the current information for that item.
- c. Update as needed then click **Save** to apply the updates, or **Cancel** to return to the **Edit Fleet Vehicle** window without saving.

**Delete Additional Vehicle Information**

- a. Click on the trash can icon to the right of the item you want to delete.

This image is identical to the previous table screenshot, but the red arrow points to the trash can icon in the Actions column.

- b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Fleet Vehicle** window without deleting.

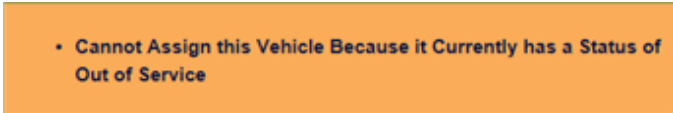
The image shows a simple confirmation dialog box. It has a title "Message From RMS" and a question "Are You Sure?". At the bottom right, there are two buttons: "No" and "Yes".

### Assign and Unassign Officers

1. Click on the **Assignments** tab to add, edit, and delete officer assignments.

Officer(s)	Assign Date	Assign End Date	Mileage	Comments	Actions
Hicks, Aaron 06/06/2018 1608 - 06/06/2018 1610	06/06/2018 1608	06/06/2018 1610			[Edit] [Delete]
Lauren, Ralph 06/01/2018 1600 - 06/03/2018 1700	06/01/2018 1600	06/03/2018 1700	1000 - 2000		[Edit] [Delete]

**NOTE:** New Assignments cannot be created on a vehicle with a **Status** of *Sold* or *Out of Service*. A cannot assign message displays if you try to assign a vehicle that is no longer available.



2. Officers can be assigned two ways: Edit an existing assignment, or add a new assignment.

#### Add a New Assignment

- a. Click on **+ Add Assignment** to create a new assignment and enter the necessary data in the window that appears as shown below.

If you enter an **End Date**, the date flows into the **End Date** field that is located under Offer Assignment.

**NOTE:** You must enter at least one officer. Any field with a red left-hand border is a required field. You must complete required fields to continue.

- b. As you enter the officer name, a list of names appear. Click on the appropriate officer name.

For example, if you enter the letters **ch**, a list will appear with all officers that contain the letters **ch** anywhere in their name. Click on the appropriate officer name to fill in the Officer field.

The dates of the officer must be within the dates of the Assignment. The officer **Start Date** will default to the Assignment start date, but it can be changed.


**NOTE:** A warning displays if the officer is assigned to the same vehicle at the same time or the officer has more than one open assignment.

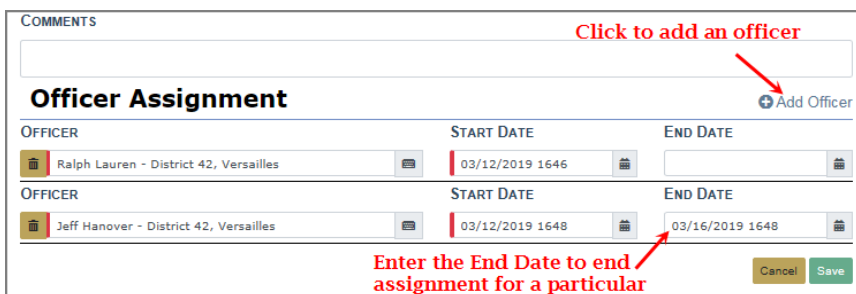
**NOTE:** A list of officers assigned to this vehicle displays if they conflict with the new assignment.

- c. Click on **+ Add Officer** to add additional officers to the assignment, if any.  
**NOTE:** A list of vehicles the officer is assigned to displays if they conflict with the new assignment.
- d. Click **Save** to create the assignment, or click **Cancel** to return to the **Assignments Tab** without saving.

### Edit an Existing Assignment

**NOTE:** If given the *always-edit assignment* permission, you can edit assignments that were created by other users; otherwise, you can only edit those that are created by you.

- a. Locate the Assignment you would like to edit, then click on the edit  icon to display the Officer Assignment window.



OFFICER	START DATE	END DATE
Ralph Lauren - District 42, Versailles	03/12/2019 1646	
Jeff Hanover - District 42, Versailles	03/12/2019 1648	03/16/2019 1648

- b. Update the necessary information, such as Start Mileage, Comments, etc. If the Vehicle Assignment contains an **End Date**, that date flows into the Officer Assignment **End Date** field.

**NOTE:** Starting mileage is entered at the time of assignment and ending mileage when the assignment is complete.

**NOTE:** A warning displays if the assignment date overlaps with existing assignments.

- c. Click on **Add Officer** to add additional officers, if applicable. Multiple officers can be added.
- d. Enter the **End Date** to end an Assignment for an officer, if applicable.
- e. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.


**NOTE:** Creating a new Assignment updates the Status of the vehicle to Assigned.

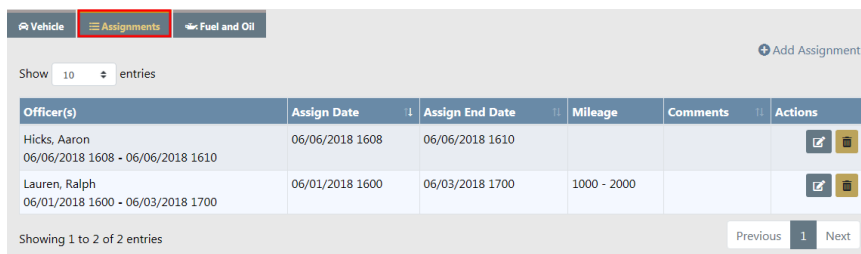
**NOTE:** Assigned vehicles display to the officer in the Daily Log module.





**NOTE:** Additional officers added to the Daily Log must also be added manually to the Assignment within Fleet Management. Refer to "Officers" on page 451 for more Daily Log information.

### End Assignments

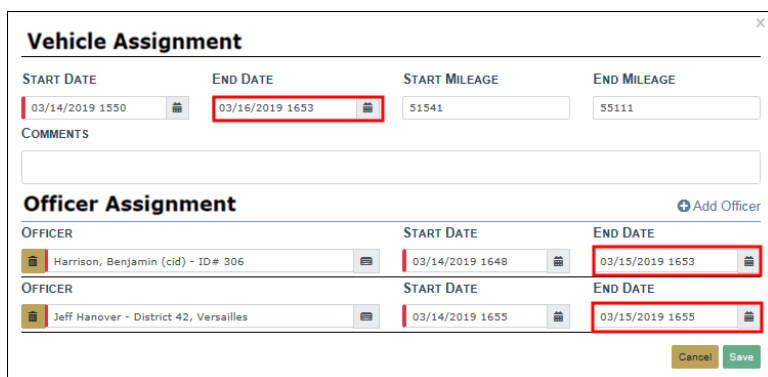
To close an entire Assignment, you must enter the **End Date** for all officers as well as the Assignment itself.

1. Click on the **Assignments** tab, then click the edit  icon on the **Assignment** you want to close.



Officer(s)	Assign Date	Assign End Date	Mileage	Comments	Actions
Hicks, Aaron 06/06/2018 1608 - 06/06/2018 1610	06/06/2018 1608	06/06/2018 1610			 
Lauren, Ralph 06/01/2018 1600 - 06/03/2018 1700	06/01/2018 1600	06/03/2018 1700	1000 - 2000		 

2. Enter the **End Date**.



**Vehicle Assignment**

START DATE: 03/14/2019 1550 | END DATE: 03/16/2019 1653 | START MILEAGE: 51541 | END MILEAGE: 55111

COMMENTS:

**Officer Assignment**

OFFICER: Harrison, Benjamin (cid) - ID# 306 | START DATE: 03/14/2019 1648 | END DATE: 03/15/2019 1653

OFFICER: Jeff Hanover - District 42, Versailles | START DATE: 03/14/2019 1655 | END DATE: 03/15/2019 1655







Buttons: Cancel, Save

**NOTE:** The officer End Dates must be on or before the Assignment End Date. Also, ending an Assignment updates the Status of the vehicle.

3. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.

### Manage Fuel, Oil, Mileage

Vehicle **Fuel, Oil, and Mileage** are managed under the **Fuel/Oil/Mileage** tab on the **Edit Fleet Vehicle** screen.

Mileage	Creator	Date of Info	Comments	Fuel / Oil	Costs	Payment	Actions
52550	M, Dana	12/01/2017 0757		Fuel: 20	Fuel: 65		Edit  
52520	Simpson, Homer	12/01/2017 0605					 
52505	Simpson, Homer	12/01/2017 0604		Fuel: 60	Fuel: 120	Payment: Gas Card Payment ID: 36 Vendor: Cop Stuff	 

### Add a New Record

1. Click on *Add Fuel / Oil / Mileage Record* on the **Fuel/Oil/Mileage** tab to add a new record.
2. Enter the relevant information.

**Fuel/Oil/Mileage**

CURRENT MILEAGE/HOURS: 13505

MILEAGE/HOURS ODOMETER: 13701

MILES/HOURS USED: 196 ← **Current Mileage/Hours minus Mileage/Hours Odometer**

DATE OF INFO: 12/04/2019 1131

OFF DUTY MILES: [ ]

FUEL GALLONS: [ ]

TOTAL FUEL COST: [ ]

SERVICE INTERVAL: -Select-

OIL QUANTITY: [ ]

TOTAL OIL COST: [ ]

FUEL TYPE: -Select-

OTHER FLUID TYPE: -Select-

OTHER FLUID COST: [ ]

COMMENTS: [ ]

PAYMENT TYPE: -Select-

PAYMENT ID: [ ]

SELECT VENDOR  SPECIFY VENDOR

-Select-

Hide Fields **Click to display only relevant fields** Cancel Save

**NOTE:** The **Current Mileage** displayed on the *Vehicle Tab* looks at service maintenance records (excluding crash report service maintenance

records) and fuel/oil/mileage records to find the max mileage entered for the vehicle.

Optionally, click the **Hide Fields** button to display only relevant fields for which you need to supply data.

Click the **Show Fields** button to display all hidden fields.

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

**NOTE:** A permission category controls the default look is this screen. If the permission category is assigned, then you see all the fields with a **Hide Fields** button; otherwise, only a portion of the fields appear with the **Show Fields** button.

- The *Current Mileage/Hours* and *Mileage/Hours Odometer* fields are both read-only.
- Fields with a down arrow  supply a list of values from which to choose. Click on the field then choose from the list that appears.
- If applicable, the **Vendor** gives you the option to *Select* a value from a list, or *Specify* your own Vendor. Click on one of the options, then select or enter your answer in the text field provided.

Select a Vendor Example:

**SELECT VENDOR**  **SPECIFY VENDOR**

Specify a Vendor Example:

**SELECT VENDOR**  **SPECIFY VENDOR**

3. Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Mileage Tab** without saving.
4. The record appears under the **Fuel/Oil/Mileage Tab** of the **Edit Fleet Vehicle** screen.

**NOTE:** The **Current Mileage** displayed on the *Vehicle Tab* looks at service maintenance records (excluding crash report service maintenance records) and fuel/oil/mileage records to find the max mileage entered for the vehicle.

Mileage	Creator	Date of Info	Comments	Fuel / Oil	Costs	Payment	Actions
13701	Saur, Christine	12/04/2019 1131		Fuel: 23 Oil: 1 Fluid: Washer Fluid	Fuel: 50.37 Oil: 5.5 Fluid: 3.25		
13505	Simpson, Homer	12/18/2018 0924		Fuel: 10 Oil: 10 Fluid: Air Conditioning Coolant	Fuel: 100 Oil: 100 Fluid: 100	Vendor: Cop Stuff	

CURRENT MILEAGE/HOURS 13,701	LAST DATE OF MILEAGE/HOURS 12/04/2019	MILEAGE/HOURS DRIVEN 13,700
COST OF OWNERSHIP \$1,451.12	NEXT SERVICE MILEAGE/HOURS 57,154	NEXT SERVICE DATE 06/18/2019

[Update](#)

Vehicle Id	Make	Model	Agency	Assigned Officers	Purchased Date	Current Mileage	Actions
51	Ford	Crown Victoria	District 42, Versailles	Dana M Badge# 12345	11/28/2017	55120	
49	Ford	Crown Victoria	District 42, Versailles	Charles Livingwell Badge# 2014, ODL User Badge# 123456	05/01/2017	1600	

### Edit a Record



**NOTE:** If given the *always-edit fuel & Oil* permission, you can edit records that were created by other users; otherwise, you can only edit those that are created by you.

1. Click on the edit icon and apply the necessary updates.
2. Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Mileage Tab** without saving.

### Delete a Record

1. Click on the trash can icon to delete a record.



Mileage	Creator	Date of Info	Comments	Fuel / Oil	Costs	Payment	Actions
55120	Saur, Christine - ID# SAUR111	12/04/2018 1345		Fuel: 23 Oil: 1 Fluid: Washer Fluid	Fuel: 50.37 Oil: 5.5 Fluid: 3.25	Payment: Out of Pocket Payment ID: 5 Vendor: Caseys	 

2. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Fuel/Oil/Mileage** window without deleting.

Message From RMS


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Are You Sure?

No
Yes

### Add a Service Request

To add a **Service Request** to a vehicle you must first **Search** for the vehicle, then edit the vehicle in the **Search Results** window.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. Search for the vehicle you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles " on page 601.
3. In the search results window, click the edit  icon on the vehicle that needs the **Service Request**.
4. Click on the *Vehicle* tab of the **Edit Fleet Vehicle** window, page down until you see the **Service Requests** grid, then click **Add Service Request**.

Service Requests				Click to add  Add Service Request
Type	Status	Request Date	Description	Actions
Repair	Complete	12/01/2017	tires need air	 
Equipment	Pending	12/01/2017	new radar needed	 

5. Enter the values in the *Service Request* window.

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

**Requesting Officer** defaults to the current user, but can be changed if the user is a Fleet Manager.

A notification is sent to all Fleet Managers when the Service Request is saved.

- Click **Save** to create the Service Request, **Cancel** to return to the **Edit Fleet Vehicle** window without saving, or click **Add Details** to add **Attachments** to the **Service Request**.


If you clicked the **Add Details** button, a *Service Request Information* window appears where you can add attachments.

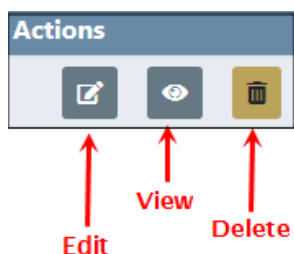
**NOTE:** Attachments are added to a temporary holding place or queue; you must then upload the files to the Service Request record.

For detailed instructions on adding attachments, refer to "Add Attachments" on page 59.

### Edit a Service Request

To edit a Service Request that is associated to a vehicle you must first **Search** for the vehicle, then edit the vehicle in the **Search Results** window.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. Search for the vehicle associated with the **Service Request**. For instructions on how to search for vehicles refer to "Search Vehicles " on page 601.
3. Click the edit  icon on the vehicle record that is associated with the **Service Request**.



4. Page down to the **Service Request** section on the **Edit Fleet Vehicle** window, then click on the edit  icon on the **Service Request** record you need to update.



The image shows a screenshot of a table titled 'Service Requests'. The table has columns for Type, Status, Request Date, Description, and Actions. A red arrow points to the edit icon in the Actions column of the first row.

Type	Status	Request Date	Description	Actions
Equipment	Complete	05/11/2017	windshield	 


5. Make the necessary updates in the **Edit Service Request** window.

Any field with a red left-hand border is a required field. You must complete required fields to continue.

**NOTE:** You can also delete, edit, or download attachments. For more information on attachments refer to "Attachments" on page 59.

6. Click **Save** to update the record, or click **Go Back** to return to the **Edit Fleet Vehicle** window without saving.

### Approve a Service Request

To approve a **Service Request** the Fleet Manager may take action on the **Service Request Notification**, or edit the vehicle and select the *Edit*  icon for the **Service Request**.

### Take Action on a Service Request Notification

When new notifications arrive, the total number of Notifications appear in red near the top right of the screen.

1. Click on the red notification indicator to view the list of Notifications and Broadcast messages.

For more information on accessing Notifications, refer to "Notifications" on page 21.

1. Click on the **Notification** tab, then click on the appropriate Service Request Notification to take action.

Notifications & Messages

Notifications		Broadcast Messages
DEPARTMENT VEHICLE SERVICE REQUEST SUBMITTED	High	Department vehicle # 51 has an open service request that requires approval.
INCIDENT FOLLOW-UP CASE - NEW SUPP FILED	High	New Incident Supplement Added to Case #00000101CASE2015. Incident #2015ROOT0022 Supp # 1 Approved. Supplement Created by Dana M.; DMM IS THERE ANOTHER ONE? A new supplement was filed for a Closed Follow-up investigation. Please review the supplement and re-open the case as needed.
INCIDENT FOLLOW-UP CASE - NEW SUPP FILED	High	New Incident Supplement Added to Case #00000099CASE2015. Incident #2015ROOT0013 Supp # 0 Approved. Supplement Created by Homer Simpson.; null

2. Click the **Take Action** button. You may also click on the **Print** icon to print the Notification.

Notification

<b>TYPE</b> DEPARTMENT VEHICLE SERVICE REQUEST SUBMITTED	<b>PRIORITY</b> High
<b>SENDER</b> Saur Christine	<b>SENT ON</b> 12/04/2018 02:59 PM CST
<b>DESCRIPTION</b> Department vehicle # 51 has an open service request that requires approval.	

Take Action
Delete
Close

**NOTE:** A warning message appears if you have already viewed or taken action on the Notification. Click **Yes** to **Take Action** or **No** to exit without taking action.

3. If you chose to Take Action the Edit Service Request screen appears. Change the **Status** to **Approved**, enter the **Reviewed By** and **Review Date**.

Go Back

**Service Request Information**

<b>STATUS</b> Approved	<b>REQUEST TYPE</b> General
<b>REQUESTING OFFICER</b> Saur, Christine	<b>REQUEST DATE</b> 03/18/2019
<b>DESCRIPTION</b>  	
<b>REVIEWED BY</b> Christine Saur - District 42, Versailles	<b>REVIEW DATE</b> 03/18/2019

Go Back
Save

**Attachments** + Add Attachment

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

4. Click **Save** to Approve then click **Go Back** to the **Edit Fleet Vehicle** window. Or click **Go Back** to abort the change without saving.
5. If you chose to save, a **Notification** is sent to the **Requested by User**.

**Edit the Vehicle**

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. The **Fleet Vehicle Search** screen appears. Search for the vehicle you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles " on page 601.

The results below are based on a search for a Toyota Highlander.

Vehicle ID	Make	Model	Agency	Assigned Officers	Purchased Date	Current Mileage	Actions
59	TOYOTA (TOYo)	Highlander	District 42, Versailles		12/16/2018	2305	[Eye] [Edit] [Trash]
45	TOYOTA (TOYo)	Highlander	District 42, Versailles			15110	[Eye] [Edit] [Trash]
44	TOYOTA (TOYo)	Highlander	District 42, Versailles	D13 Officer Badge# D13, ODL User Badge# 123456		10030	[Eye] [Edit] [Trash]
43	TOYOTA (TOYo)	Highlander	District 42, Versailles	Dana M Badge# 12345		52550	[Eye] [Edit] [Trash]
38	TOYOTA (TOYo)	Highlander	District 42, Versailles	Franklin (osuper) Harrowson Badge# 72, Sally Adams Badge# 1002, Charles Livingwell Badge# 2014		15090	[Eye] [Edit] [Trash]
36	TOYOTA (TOYo)	Highlander	District 42, Versailles	ODL No Fleet Badge# 4444			[Eye] [Edit] [Trash]

3. Click the edit icon on the vehicle that needs **Service Request** approval.
4. Page down to the **Service Request** section, and click the edit icon associated with the **Service Request**.
5. Change the **Status** to **Approved**, enter the **Reviewed By** and **Review Date**.

**NOTE:** Required fields display a red border to the left of the field.

- Click **Save** to Approve then click **Go Back** to the **Edit Fleet Vehicle** window. Or click **Go Back** to abort the change without saving.

If you chose to save, a **Notification** is sent to the **Requested by User** upon approval of the Service Request. The **Requested by User** then clicks on the Notification and opens the details to **Review**, **Reply**, or **Take Action**.

### Complete a Service Request

After the Service Request has been approved and the maintenance has been done satisfactory, the Service Request should be marked complete. To complete a **Service Request** the Fleet Manager can associate the **Service Request** to a **Service Maintenance** record, or edit the vehicle and select the Edit icon for the **Service Request**. Change the Status on an existing Service Request.

**NOTE:** For detailed instructions on associating the **Service Request** to a **Service Maintenance** record, refer to "Add Service Maintenance and Repair" on page 626.

### Change the Status on an existing Service Request:

- Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
- The **Fleet Vehicle Search** screen appears. Search for the vehicle you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles" on page 601.

The results below are based on a search for a Toyota Highlander.

Vehicle ID	Make	Model	Agency	Assigned Officers	Purchased Date	Current Mileage	Actions
59	TOYOTA (TOYO)	Highlander	District 42, Versailles		12/16/2018	2305	[Icons]
45	TOYOTA (TOYO)	Highlander	District 42, Versailles			15110	[Icons]
44	TOYOTA (TOYO)	Highlander	District 42, Versailles	D13 Officer Badge# D13, ODL User Badge# 123456		10030	[Icons]
43	TOYOTA (TOYO)	Highlander	District 42, Versailles	Dana M Badge# 12345		52550	[Icons]
38	TOYOTA (TOYO)	Highlander	District 42, Versailles	Franklin (osuper) Harrowson Badge# 72, Sally Adams Badge# 1002, Charles Livingwell Badge# 2014		15090	[Icons]
36	TOYOTA (TOYO)	Highlander	District 42, Versailles	ODL No Fleet Badge# 4444			[Icons]

3. Click the edit icon on the vehicle that needs **Service Request** approval.
4. Page down to the Service Request section, and click the edit icon associated with the Service Request.

Type	Status	Request Date	Description	Actions
Equipment	Complete	05/11/2017	windshield	[Icons]

5. Change the **Status** to **Complete**.

**Service Request Information**

**STATUS**: Complete (dropdown menu)

**REQUEST TYPE**: General (dropdown menu)

**REQUESTING OFFICER**: Saur, Christine

**REQUEST DATE**: 03/18/2019

**DESCRIPTION**: [Empty text area]

**REVIEWED BY**: Christine Saur - District 42, Versailles

**REVIEW DATE**: 03/18/2019

[Go Back] [Save]

**Attachments**: [Add Attachment]

6. Click **Save** to Complete then click **Go Back** to the **Edit Fleet Vehicle** window, or click **Go Back** without saving to abort the change.

**NOTE:** Completing a Service Request removes it from the Open Dashboard.



### Delete Service Requests

To delete service requests you must first **Search** for the vehicle that is tied to the service request. The **Search Results** will provide the option to delete the service request record.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. The **Fleet Vehicle Search** screen appears. Search for the vehicle you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles " on page 601.

The results below are based on a search for a Toyota Highlander.

Vehicle ID	Make	Model	Agency	Assigned Officers	Purchased Date	Current Mileage	Actions
59	TOYOTA (TOYO)	Highlander	District 42, Versailles		12/16/2018	2305	
45	TOYOTA (TOYO)	Highlander	District 42, Versailles			15110	
44	TOYOTA (TOYO)	Highlander	District 42, Versailles	D13 Officer Badge# D13, ODL User Badge# 123456		10030	
43	TOYOTA (TOYO)	Highlander	District 42, Versailles	Dana M Badge# 12345		52550	
38	TOYOTA (TOYO)	Highlander	District 42, Versailles	Franklin (osuper) Harrowson Badge# 72, Sally Adams Badge# 1002, Charles Livingwell Badge# 2014		15090	
36	TOYOTA (TOYO)	Highlander	District 42, Versailles	ODL No Fleet Badge# 4444			

3. Identify which vehicle is associated with the service requests and click on the edit icon.
4. Page down to the Service Requests section and click on the Delete icon to delete.

Type	Status	Request Date	Description	Actions
General	Pending	02/20/2019		

5. A confirmation message appears.

Message From RMS

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Are You Sure?

6. Click **Yes** to delete or **No** to return to the results window without deleting.

**NOTE:** Deleting a **Service Request** also removes it from an associated **Service Maintenance** record.

**Add Service Maintenance and Repair**

**Service Maintenance** records reflect the total service cost associated to an invoice, and **Service Repair** records reflect detailed costs of that invoice.

For example, a **Service Maintenance** record contains the total invoice amount of \$100 for invoice number 1234, and there are two **Service Repair** records (tire repair \$50 and oil change \$50) that equal \$100 for invoice number 1234.

To add a **Service Maintenance** record to a vehicle you must first **Search** for the vehicle, then edit the vehicle in the **Search Results** window.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. The **Fleet Vehicle Search** screen appears. Search for the vehicle. For instructions on how to search for vehicles refer to "Search Vehicles " on page 601.

The results below are based on a search for a Toyota Highlander.

Vehicle ID	Make	Model	Agency	Assigned Officers	Purchased Date	Current Mileage	Actions
59	TOYOTA (TOYo)	Highlander	District 42, Versailles		12/16/2018	2305	[Icons]
45	TOYOTA (TOYo)	Highlander	District 42, Versailles			15110	[Icons]
44	TOYOTA (TOYo)	Highlander	District 42, Versailles	D13 Officer Badge# D13, ODL User Badge# 123456		10030	[Icons]
43	TOYOTA (TOYo)	Highlander	District 42, Versailles	Dana M Badge# 12345		52550	[Icons]
38	TOYOTA (TOYo)	Highlander	District 42, Versailles	Franklin (osuper) Harrowson Badge# 72, Sally Adams Badge# 1002, Charles Livingwell Badge# 2014		15090	[Icons]
36	TOYOTA (TOYo)	Highlander	District 42, Versailles	ODL No Fleet Badge# 4444			[Icons]

3. Click the edit icon on the vehicle that needs the **Service Maintenance**.
4. Page down and click **Add Service/Maintenance Record** on the **Edit Fleet Vehicle** window.

Type	Status	Request Date	Description	Actions
General	Pending	02/20/2019		[Icons]

**Service / Maintenance Records** + Add Service/Maintenance Record

**Service Maintenance** records then appear in the grid as shown above. You can edit or delete the **Service Maintenance** records.

5. Enter the values in the Service/Maintenance window.

**Service / Maintenance**

MILEAGE/HOURS ODOMETER  
54154

START DATE  
11/05/2020

SELECT VENDOR  SPECIFY VENDOR  
Warner truck stop

INVOICE NUMBER  
451

HOURS DOWN  
2

SERVICE COST  
\$80.00

COMMENTS  
Replace two windshield wipers.

RESET SERVICE INTERVAL MILEAGE

Cancel Add Details Save

**Note:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

- The **Vendor** gives you the option to *Select* a value from a list, or *Specify* your own Vendor. Click on one of the options, then select or enter your answer in the text field provided.
- **Reset Service Interval Mileage**
  - Leave this box **empty** if you would like to record services without resetting mileage. Example is when a tire is changed.
  - **Check** this box if you would like Online RMS to use the mileage of this service maintenance record to determine the *Next Service Mileage* displayed on the *View and Edit Vehicle* screens, as well as, use on the *Due for Maintenance Dashboard*. Example is when the oil is changed.
  - This option is not available for service maintenance records created as part of a crash report.

- Click **Save** to create the **Service Maintenance** record, **Cancel** to return to the **Edit Fleet Vehicle** window without saving, or click **Add Details** to add **Service Repair** records.
- If you chose to **Add Details**, the *Edit Service Record* appears. Select the Associate Service Requests, if applicable.

**Service/Maintenance Information**

MILEAGE/HOURS ODOMETER: 55121 | ESTIMATED COST: | INVOICE NUMBER: 545

SERVICE COST: \$65.00 | SUPPLEMENTAL COST: | TOTAL COST: \$65.00

HOURS DOWN: 1 | TECHNICIAN: | SELECT VENDOR: Warner truck stop

COMMENTS: Oil Change

START DATE: 03/09/2020 | END DATE: | COMPLETION DATE:

**Associate Service Requests**

Type	Status	Request Date	Description	Actions
Equipment	Pending	11/22/2019		<input type="checkbox"/>

Buttons: Go Back, Save, + Add Service Repair, + Add Attachment

**Note:** The Fleet Manager can associate none, one, or multiple **Service Requests** to the **Service Record**. All selected **Service Requests** will become marked as **Complete**.

**Note:** Total Cost is read-only and calculates automatically: Service cost + supplemental costs + repair costs.

- Click **Add Service Repair** to enter repair types and costs associated with the **Service Maintenance** record, if any.

**Service Repair**

TYPE: Windshield

COST: 70

DESCRIPTION: Wiper Motor.

Buttons: Cancel, Save

- Click **Save** to create the Service Repair record. **Service Repair** records then appear in the grid as shown above. You can edit or delete the **Service Repair** records.

- Click **Add Attachment** to include images or documents to the **Service Maintenance** record, if any.

Keyword	File Name	Description	Date of Info	Actions
PDF	TestDocument.txt		11/22/2019	Download                      Edit                      Delete

For more information on adding attachments, refer to "Add Attachments" on page 59.

- Click **Save**, or click **Go Back** to return to the **Edit Fleet Vehicle** window. Both pending and approved **Service Requests** can be associated with a **Service Maintenance Record**.

**NOTE:** A **Service Request** can be associated with only one **Service Maintenance Record**.

**NOTE:** All selected **Service Requests** will become marked as **Complete**.

### Update Service Maintenance and Repair

**Service Maintenance** records reflect the total service cost associated to an invoice, and **Service Repair** records reflect detailed costs of that invoice.

For example, a **Service Maintenance** record contains the total invoice amount of \$100 for invoice number 1234, and there are two **Service Repair** records (tire repair \$50 and oil change \$50) that equal \$100 for invoice number 1234.

To update a **Service Maintenance** record to a vehicle you must first **Search** for the vehicle, then edit the vehicle in the **Search Results** window.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 578.
2. The **Fleet Vehicle Search** screen appears. Search for the vehicle. For instructions on how to search for vehicles refer to "Search Vehicles" on page 601.

The results below are based on a search for a Toyota Highlander.

Vehicle ID	Make	Model	Agency	Assigned Officers	Purchased Date	Current Mileage	Actions
59	TOYOTA (TOYo)	Highlander	District 42, Versailles		12/16/2018	2305	[Eye] [Edit] [Trash]
45	TOYOTA (TOYo)	Highlander	District 42, Versailles			15110	[Eye] [Edit] [Trash]
44	TOYOTA (TOYo)	Highlander	District 42, Versailles	D13 Officer Badge# D13, ODL User Badge# 123456		10030	[Eye] [Edit] [Trash]
43	TOYOTA (TOYo)	Highlander	District 42, Versailles	Dana M Badge# 12345		52550	[Eye] [Edit] [Trash]
38	TOYOTA (TOYo)	Highlander	District 42, Versailles	Franklin (osuper) Harrowson Badge# 72, Sally Adams Badge# 1002, Charles Livingwell Badge# 2014		15090	[Eye] [Edit] [Trash]
36	TOYOTA (TOYo)	Highlander	District 42, Versailles	ODL No Fleet Badge# 4444			[Eye] [Edit] [Trash]

3. Click the edit icon on the vehicle that needs the **Service Maintenance** updated.
4. Page down to the **Service/Maintenance Records** section of the **Edit Fleet Vehicle** window.

Type	Status	Request Date	Description	Actions
General	Pending	02/20/2019		[Edit] [Trash]

**Service / Maintenance Records** + Add Service/Maintenance Record

**Service Maintenance** records then appear in the grid as shown above. Select the **Edit** icon on the maintenance record you want to update.

5. Make the necessary updates in the **Service/Maintenance Information** window. You may also add **Service Repair** records and **Attachments** (for detailed instructions refer to the "Add Service Maintenance and Repair" on page 626 section).

**Service/Maintenance Information**

MILEAGE/HOURS ODOMETER: 55121  
 ESTIMATED COST:   
 INVOICE NUMBER: 545  
 SERVICE COST: \$65.00  
 SUPPLEMENTAL COST:   
 TOTAL COST: \$65.00  
 HOURS DOWN: 1  
 TECHNICIAN:   
 SELECT VENDOR (selected): Warner truck stop  
 COMMENTS: Oil Change  
 START DATE: 03/09/2020  
 END DATE:   
 COMPLETION DATE:

**Associate Service Requests**

Type	Status	Request Date	Description	Actions
Equipment	Pending	11/22/2019		<input type="checkbox"/>

Go Back Save Add Service Repair Add Attachment

**Note:** The Fleet Manager can associate none, one, or multiple **Service Requests** to the **Service Record**. All selected **Service Requests** will become marked as **Complete**.

6. Click the **Save** button to save your changes, then click **Go Back** to return to the **Edit Fleet Vehicle** window.

## Fleet Officer

By having the **Fleet Officer** permission category, you can perform the following in the **Fleet Management** module:

- View fleet vehicles currently or previously assigned to you.
- Search all vehicles regardless of the assignees.
- Assign a vehicle to yourself or add yourself to an existing assignment.
- You can create and edit Fuel & Oil records and Service Requests to your assigned vehicle.

- You can delete Fuel and Oil records that you have created, but not records created by others.
- You can edit Fuel and Oil records that you have created, but not records created by others.
- Add attachments to your assigned vehicle.

**NOTE:** Only Fleet Managers and Administrators have the ability to add, update, and delete Fleet Vehicles.

Below is an overview of the basic functionality:

1. Click on the **Records Management** menu then **Fleet Management** sub-menu to open the Fleet Management page.
2. Click the **Manage Vehicles** button to access **Fleet Vehicle Assignments**.
3. Vehicles *Currently assigned* to you display by default. You also have the option to change the *Display* to view vehicles *previously assigned* to you.

Display: **Current Assignments** Go Back Search Vehicles

Search:  Search Reset Show 10 entries

Unit #	Make	Model	License #	Assignment Start Date	Assignment End Date	Actions
63	FORD/COURIER/FORD	TAURUS GOLDLINE CAMPER (FORD)	987aaa	12/18/2018		
123	HONDA/AMERICAN HONDA MOTOR CO, INC(HOND)	PILOT	1	12/17/2018		
dmm1	TOYOTA(TOYo)	4Runner		06/01/2018		
700	Ford	Crown Victoria	876123	07/06/2017		
44	TOYOTA(TOYo)	Highlander	qqq111	06/09/2017		
123	PORSCHE(PORS)	911	FAST-COP	05/11/2017		

Showing 1 to 6 of 6 entries Previous 1 Next

Display: **Past Assignments** Go Back Search Vehicles


Search:  Search Reset Show 10 entries

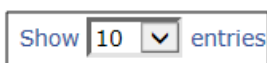
Unit #	Make	Model	License #	Assignment Start Date	Assignment End Date	Actions
100	TOYOTA(TOYo)	4Runner	THI223	12/19/2018	12/19/2018	
dmm2	HONDA/AMERICAN HONDA MOTOR CO, INC(HOND)	PILOT	DMM789	06/06/2018	06/06/2018	
ddd	CHEVROLET(CHEV)	IMPALA	5656	06/09/2017	06/09/2017	





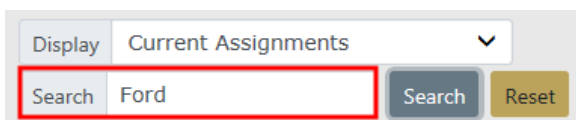
You may also search all vehicles, regardless of the officer assignment. Click on the **Search Vehicles** icon to display the **Fleet Vehicle Search** window.

For details on searching all vehicles refer to "Search All Vehicles " on page 635.

4. You can change the number of entries that appear in the grid. Click on the **Show Entries**  and select 10, 25, 50 or 100. The default is 10.



5. Click the icons under the *Action* column to View  or Edit .
6. **Search** or filter Vehicle Assignments to return a list that only matches the entered text.



Enter the text you want to search on in the Search text box, then click the **Search** button or press **Enter** to display only records matching the entered text. The displayed list dynamically changes based on the entered text. For example, enter *Ford* to list only vehicles that contain the word Ford. Click **Reset** to remove the entered text and display all vehicles.

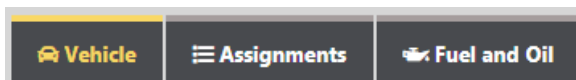
7. Click **Go Back** to return to the **Records Management** menu, from which to access the different Online RMS modules.

For information on **Records Management**, refer to "Records Management Button" on page 37.

### View Vehicle

Click the **View** icon to view a particular vehicle record and the associated information. Information in the **View Fleet Vehicle** window is read-only and cannot be changed.


The **View Fleet Vehicle** window contains three tabs:

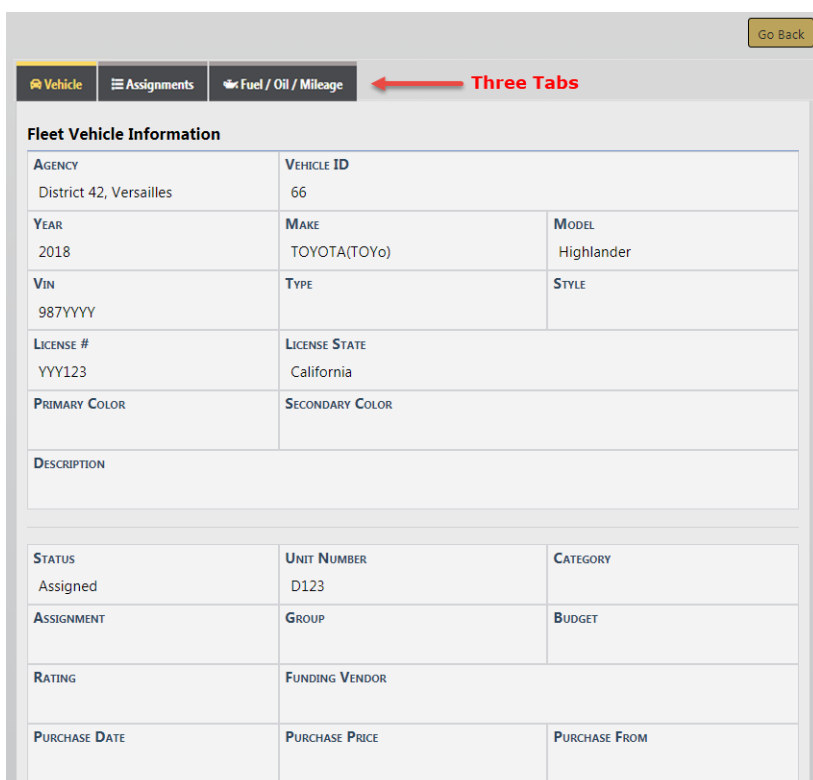


- Vehicle

- Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. The **View Fleet Window** opens to this tab by default as shown in the above image.
- Assignments
  - A history of officers assigned to the vehicle, along with the dates.
- Fuel and Oil
  - Summarization of the type of fluids put in the vehicle, along with the dates.

Click on the **Back** button to return to the **Fleet Vehicle Assignments** window. For your convenience, this button is located on the upper right of the window and on the lower center of the window.

Click on the download icon  in the *Attachment* section of *Vehicle* tab to download available documents or photos.



Fleet Vehicle Information		
AGENCY	VEHICLE ID	
District 42, Versailles	66	
YEAR	MAKE	MODEL
2018	TOYOTA(TOYo)	Highlander
VIN	TYPE	STYLE
987YYYY		
LICENSE #	LICENSE STATE	
YYY123	California	
PRIMARY COLOR	SECONDARY COLOR	
DESCRIPTION		
STATUS	UNIT NUMBER	CATEGORY
Assigned	D123	
ASSIGNMENT	GROUP	BUDGET
RATING	FUNDING VENDOR	
PURCHASE DATE	PURCHASE PRICE	PURCHASE FROM

### Search All Vehicles

1. Click the **Search Vehicles** button on the **Fleet Vehicle Assignments** window.

Unit #	Make	Model	License #	Assignment Start Date	Assignment End Date	Actions
63	FORD/COURIER/FORDTAURUS GOLDLINE CAMPER (FORD)		987aaa	12/18/2018		
123	HONDA/AMERICAN HONDA MOTOR CO, INC(HOND)	PILOT	1	12/17/2018		

2. The **Fleet Vehicle Search** screen appears. Enter various pieces of information about the vehicle, such as VIN, Make, Model, etc.

**NOTE:** The Agency of the vehicle defaults to the Agency of the logged in user; however, you can change it to any agency within the organization by clicking on the .

**Vehicle Search** Go Back Add Vehicle

AGENCY: Indiana State Police

YEAR:

MAKE:

MODEL:

VIN:

TYPE:

STYLE:

LICENSE #:

LICENSE STATE:

MISC ID TYPE:

MISC ID VALUE:

FLEET ID:

SERVICE REQUEST STATUS:

STATUS:

UNIT NUMBER:

CATEGORY:

ASSIGNMENT:

GROUP:

BUDGET:

RATING:

CURRENT MILEAGE:

DELINQUENT MILEAGE:

MAINTENANCE DATE FROM:


MAINTENANCE DATE TO:

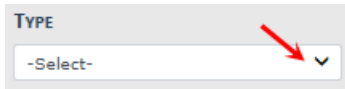
MAINTENANCE MILES FROM:


MAINTENANCE MILES TO:

ADDITIONAL SEARCH CRITERIA:

Go Back Reset Search

The fields with **-Select-** supply a specific list from which to choose. For example, to search for a vehicle **Type** of *Automobile* click on the  and a list appears, then select from the drop-down list that appears.



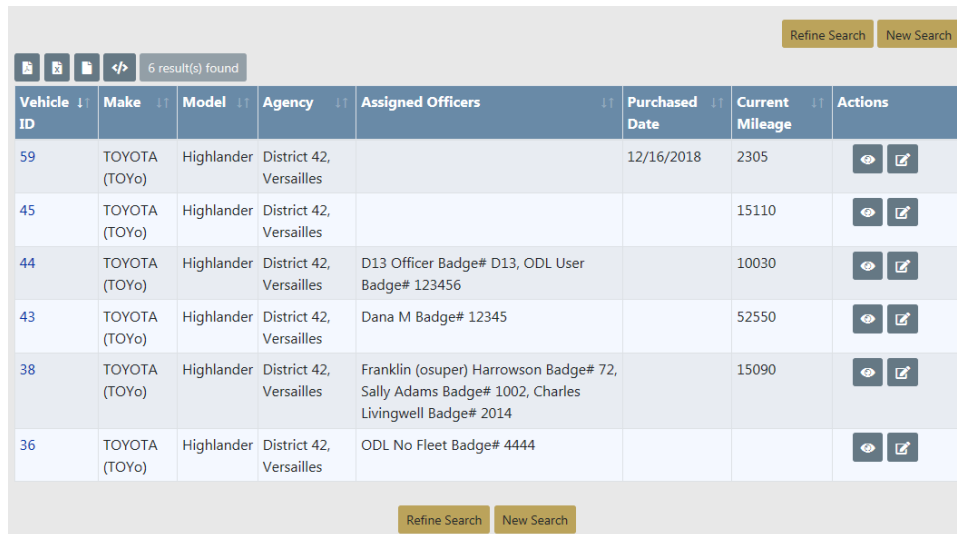
The fields with an  on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *chev* to view a list of *chev* options from which to choose, then click on the option you want and it appears in the **Make** field.















**NOTE:** You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

- 3. Either click **Reset** to clear all fields to start over, click **Go Back** to return to the **Fleet Vehicle Assignments** window, or click **Search** to display a list of existing vehicles that match the entered data.

If you selected **Search** the results are displayed in a grid. The example below is a search result for **Make Toyota(Toyo)** and **Model Highlander** and **Agency District 42, Versailles**.




Vehicle ID	Make	Model	Agency	Assigned Officers	Purchased Date	Current Mileage	Actions
59	TOYOTA (TOYo)	Highlander	District 42, Versailles		12/16/2018	2305	 
45	TOYOTA (TOYo)	Highlander	District 42, Versailles			15110	 
44	TOYOTA (TOYo)	Highlander	District 42, Versailles	D13 Officer Badge# D13, ODL User Badge# 123456		10030	 
43	TOYOTA (TOYo)	Highlander	District 42, Versailles	Dana M Badge# 12345		52550	 
38	TOYOTA (TOYo)	Highlander	District 42, Versailles	Franklin (osuper) Harrowson Badge# 72, Sally Adams Badge# 1002, Charles Livingwell Badge# 2014		15090	 
36	TOYOTA (TOYo)	Highlander	District 42, Versailles	ODL No Fleet Badge# 4444			 

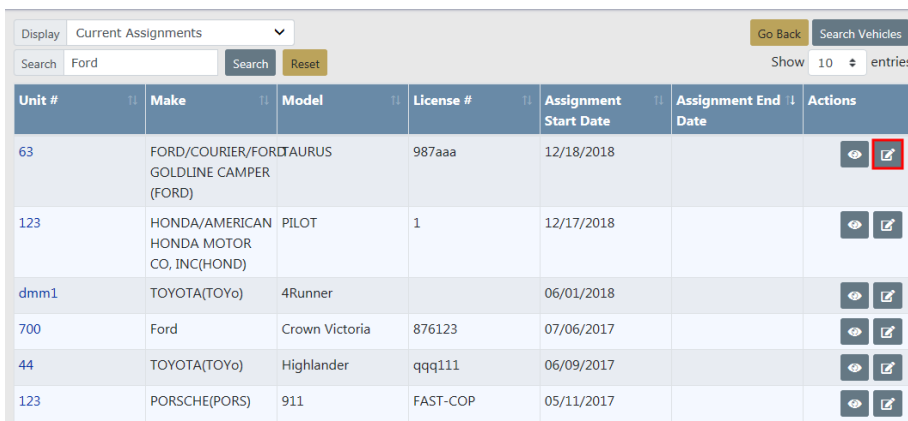
Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over, or click **Go Back** to return to the **Fleet Vehicle Assignments**













window. Click on the Vehicle ID of the vehicle record to view details, or click on the View icon on the right as shown below.

- 4. To export search results to a file refer to "Export Search Results" on page 31.

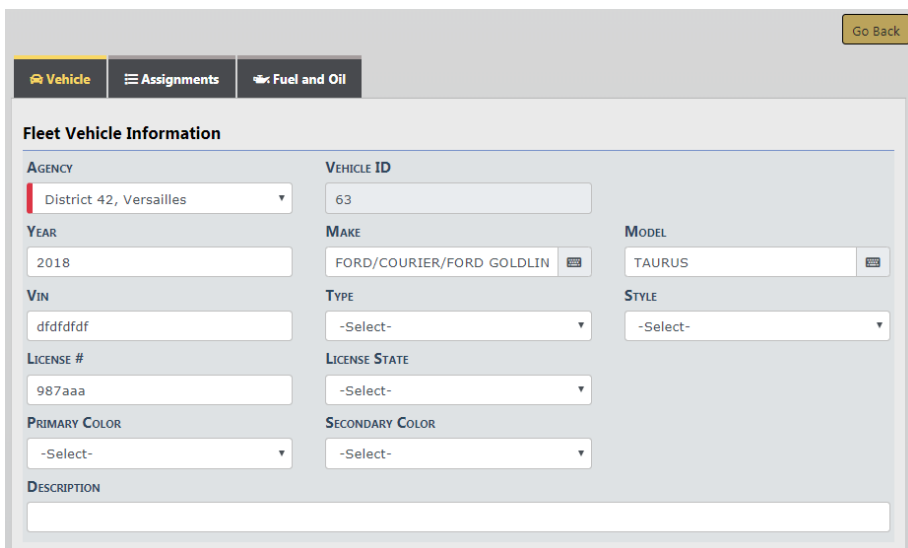
### Add or Update Overview

By having the **Fleet Officer** permission category, you can add, update, or delete *Fuel & Oil*, *Service Requests*, and *Attachments* to vehicles you are assigned. On the **Fleet Vehicle Assignments** window locate the vehicle you want to update, then click the edit  icon.



Unit #	Make	Model	License #	Assignment Start Date	Assignment End Date	Actions
63	FORD/COURIER/FORD	GOLDLINE CAMPER (FORD)	987aaa	12/18/2018		 
123	HONDA/AMERICAN HONDA MOTOR CO, INC(HOND)	PILOT	1	12/17/2018		 
dmm1	TOYOTA(TOYo)	4Runner		06/01/2018		 
700	Ford	Crown Victoria	876123	07/06/2017		 
44	TOYOTA(TOYo)	Highlander	qqq111	06/09/2017		 
123	PORSCHE(PORS)	911	FAST-COP	05/11/2017		 

The **Edit Fleet Vehicle** window appears.



**Fleet Vehicle Information**

AGENCY: District 42, Versailles

YEAR: 2018

VIN: dfdfdfdf

LICENSE #: 987aaa

PRIMARY COLOR: -Select-

DESCRIPTION:

VEHICLE ID: 63

MAKE: FORD/COURIER/FORD GOLDLIN

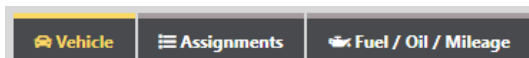
MODEL: TAURUS

TYPE: -Select-

LICENSE STATE: -Select-

SECONDARY COLOR: -Select-

The **Edit Fleet Vehicle** window contains three tabs:



### Vehicle

- Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. This tab opens by default.
- You can add, update, or delete *Service Requests* and *Attachments* from this tab on records created by you.

### Assignments

- A history of officers assigned to the vehicle, along with the dates. You can assign yourself to the vehicle, and update assignment dates and mileage on records created by you. You can also delete records created by you.

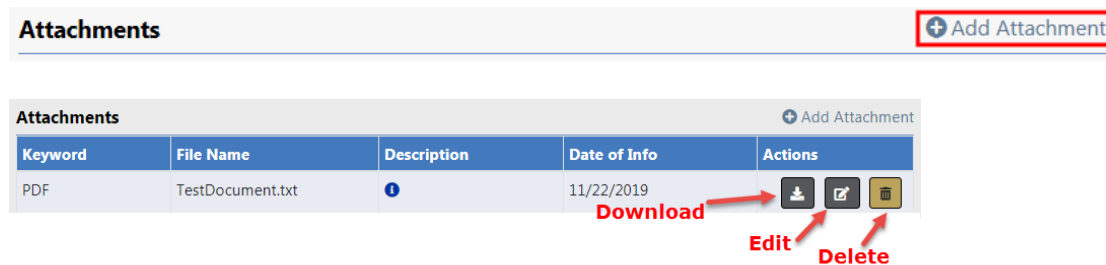
### Fuel and Oil

- A summary of the type of fluids put in the vehicle, along with the dates. Access this tab to add, update or delete fuel and oil records.

Click on the **Go Back** button to return to the **Fleet Vehicle Assignments** window.

### Add and Update Attachments

Click on the appropriate icons to *Add, Edit, Delete, and Download Attachments*.



For more information on adding, editing, and deleting attachments, refer to "Attachments" on page 59.

### Add a Service Request

1. From the **Edit Fleet Vehicle** window, click on the *Add Service Request* link to open the **Service Request** window.

**Service Request**

**REQUESTING OFFICER**  
Aaron Hicks

**REQUEST TYPE**  
General

**REQUEST DATE**  
03/18/2019

**STATUS**  
Pending

**DESCRIPTION**

Cancel Add Details Save

Select the *Request Type*, *Request Date*, and enter a *Description*. Any field with a red left-hand border is a required field. You must complete required fields to continue.

**NOTE:** The *Requesting Officer* and *Status* cannot be changed.

- 2. Click **Save** to save the **Service Request** or click **Add Details** to add images and attachments. Click **Cancel** to exit without saving.

**NOTE:** Service Request attachments do not appear in the Attachments grid of the **Edit Fleet Vehicle** window. To view Service Request attachments you must open the **Service Request**.

- 3. If you chose to **Add Details**, enter the necessary information on the **Edit Service Request** screen then click **Add Attachment** to upload files.

**Service Request Information**

**STATUS**  
Approved

**REQUEST TYPE**  
Equipment

**REQUESTING OFFICER**  
Hicks, Aaron

**REQUEST DATE**  
05/11/2017

**DESCRIPTION**

**REVIEWED BY**  
Saur, Christine

**REVIEW DATE**  
02/20/2019

Go Back Save


**Attachments** [+ Add Attachment](#)

**NOTE:** **Requesting Officer** defaults to the current user and can only be changed by the Fleet Manager. The **Status, Reviewed By** and **Review Date** cannot be changed.


A notification is sent to the Fleet Manager when the **Service Request** is saved.

For further instructions on adding Attachments refer to "Add and Update Attachments" on page 638.

### Update Service Requests

1. From the **Edit Fleet Vehicle** window, locate the **Service Request** record to update and click the edit  icon.

Service Requests <span style="float: right;">+ Add Service Request</span>				
Type	Status	Request Date	Description	Actions
Equipment	Complete	05/11/2017	windshield	 

**NOTE:** You can update **Service Requests** that were created by you. The edit  icon does not display on **Service Requests** that have been set up by someone else.

2. Modify the values as needed.

[Go Back](#)

#### Service Request Information

<p><b>STATUS</b></p> <div style="border: 1px solid #ccc; padding: 2px;">Approved <span style="float: right;">▼</span></div>	<p><b>REQUEST TYPE</b></p> <div style="border: 1px solid #ccc; padding: 2px;">Equipment <span style="float: right;">▼</span></div>
<p><b>REQUESTING OFFICER</b></p> <div style="border: 1px solid #ccc; padding: 2px;">Hicks, Aaron <span style="float: right;">⋮</span></div>	<p><b>REQUEST DATE</b></p> <div style="border: 1px solid #ccc; padding: 2px;">05/11/2017 <span style="float: right;">📅</span></div>
<p><b>DESCRIPTION</b></p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	
<p><b>REVIEWED BY</b></p> <div style="border: 1px solid #ccc; padding: 2px;">Saur, Christine <span style="float: right;">⋮</span></div>	<p><b>REVIEW DATE</b></p> <div style="border: 1px solid #ccc; padding: 2px;">02/20/2019 <span style="float: right;">📅</span></div>

[Go Back](#)
Save


**Attachments** + Add Attachment



**NOTE:** The **Requesting Officer, Status, Reviewed By** and **Review Date** cannot be changed.



3. Click **Save** to save the updated information, or click **Go Back** to return to the previous screen without saving the updates.
4. Optionally add, edit or delete Attachments. For detailed instructions refer to "Add and Update Attachments " on page 638.

**Delete Service Requests**

1. From the **Edit Fleet Vehicle** window, locate the **Service Request** to delete then click the Delete icon .

Service Requests <span style="float: right;">+ Add Service Request</span>				
Type	Status	Request Date	Description	Actions
General	Pending	02/20/2019		 

**NOTE:** You can delete **Service Requests** that were created by you. The Delete icon does not display on **Service Requests** that have been set up by someone else.




For further details on how to delete refer "Delete Data " on page 648.

**Manage Fuel, Oil, and Mileage**

By having the **Fleet Officer** permission category, you can add, update, or delete *Fuel/Oil/Mileage* records that are assigned to you. However, the ability to update or delete may vary, depending on whether or not your agency is utilizing the lock hours feature, or you always have edit fuel and oil permissions.

For example, when the lock hours are set to 100, you can edit the record if you are the creator, and today is within 100 hours of record creation.

**NOTE:** Fleet Managers may update and delete fuel, oil & Mileage records, regardless of the configured lock hours.

Fuel / Oil / Mileage <span style="float: right;">Go Back</span>									
Mileage	Creator	Date of Info	Comments	Fuel / Oil	Costs	Payment	Actions		
13505	Simpson, Homer	12/18/2018 0924		Fuel: 10 Oil: 10 Fluid: Air Conditioning Coolant	Fuel: 100 Oil: 100 Fluid: 100	Vendor: Cop Stuff	 		

Showing 1 to 1 of 1 entries Previous 1 Next

### Add Fuel, Oil, and Mileage

1. Click on *Add Fuel / Oil / Mileage Record* on the **Fuel/Oil/Mileage** tab to add a new record, then enter the relevant information.

**Fuel/Oil/Mileage**

<b>CURRENT MILEAGE/HOURS</b> 13505	<b>MILEAGE/HOURS ODOMETER</b> 13701	<b>MILES/HOURS USED</b> 196 ← <b>Current Mileage/Hours minus Mileage/Hours Odometer</b>
<b>DATE OF INFO</b> 12/04/2019 1131	<b>OFF DUTY MILES</b> [Empty]	<b>SERVICE INTERVAL</b> -Select-
<b>FUEL GALLONS</b> [Empty]	<b>TOTAL FUEL COST</b> [Empty]	<b>FUEL TYPE</b> -Select-
<b>OIL QUANTITY</b> [Empty]	<b>TOTAL OIL COST</b> [Empty]	
<b>OTHER FLUID TYPE</b> -Select-	<b>OTHER FLUID COST</b> [Empty]	
<b>COMMENTS</b> [Empty]		
<b>PAYMENT TYPE</b> -Select-	<b>PAYMENT ID</b> [Empty]	
<input checked="" type="radio"/> <b>SELECT VENDOR</b> <input type="radio"/> <b>SPECIFY VENDOR</b> -Select-		
Hide Fields ← <b>Click to display only relevant fields</b> Cancel   Save		

**NOTE:** Required fields display a red border to the left of the field.

**NOTE:** The **Current Mileage** displayed on the *Vehicle Tab* looks at service maintenance records (excluding crash report service maintenance records) and fuel/oil/mileage records to find the max mileage entered for the vehicle.


Optionally, click the **Hide Fields** button to display only relevant fields for which you need to supply data.

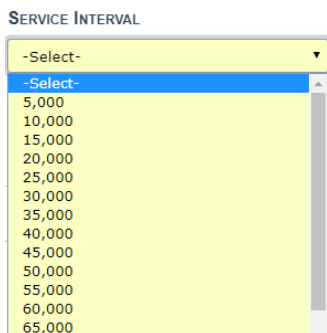
**Fuel/Oil/Mileage**

<b>CURRENT MILEAGE/HOURS</b> 13505	<b>MILEAGE/HOURS ODOMETER</b> [Empty]	<b>MILES/HOURS USED</b> -
<b>DATE OF INFO</b> 12/04/2019 1131	<b>OFF DUTY MILES</b> [Empty]	<b>SERVICE INTERVAL</b> -Select-
Show Fields ← <b>Click to show all hidden fields</b> Cancel   Save		

Click the **Show Fields** button to display all hidden fields.

- The *Current Mileage/Hours* and *Miles/Hours Used* fields are both read-only.






- Fields with a down arrow  supply a list of values from which to choose. Click on the field then choose from the list that appears.
- If applicable, the **Vendor** gives you the option to *Select* a value from a list, or *Specify* your own Vendor. Click on one of the options, then select or enter your answer in the text field provided.
- **Service Interval** allows you to select the number of miles until the next service. The list values are configured by the agency. For details, refer to your administrator.



2. Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Milage** tab without saving.
3. The record appears under the **Fuel/Oil/Milage** tab of the **Edit Fleet Vehicle** screen.

The **Current Mileage** displayed on the **Vehicle Tab** reflects the *Mileage* entered on the most recent Fuel and Oil record, and on the **Fleet Vehicle Search Results** screen.

The **Cost of Ownership** displayed on the **Vehicle Tab** reflects the *Purchase Price + All Fuel & Oil Costs + All Service Maintenance Costs* entered for the vehicle.

Mileage	Creator	Date of Info	Comments	Fuel / Oil	Costs	Payment	Actions
13701	Saur, Christine	12/04/2019 1131		Fuel: 23 Oil: 1 Fluid: Washer Fluid	Fuel: 50.37 Oil: 5.5 Fluid: 3.25		 
13505	Simpson, Homer	12/18/2018 0924		Fuel: 10 Oil: 10 Fluid: Air Conditioning Coolant	Fuel: 100 Oil: 100 Fluid: 100	Vendor: Cop Stuff	 

CURRENT MILEAGE/HOURS 13,701	LAST DATE OF MILEAGE/HOURS 12/04/2019	MILEAGE/HOURS DRIVEN 13,700
COST OF OWNERSHIP \$1,451.12	NEXT SERVICE MILEAGE/HOURS 57,154	NEXT SERVICE DATE 06/18/2019

[Update](#)

### Edit Fuel, Oil, and Mileage


You can edit fuel, oil, and mileage records under the following conditions:

- You are the creator of the record and the system time is within the configured lock hours of the creation date.

For example, when the lock hours are set to 100, you can edit the record if you are the creator, and today is within 100 hours of record creation.

For more information on lock hours, refer to your agency administrator.

- Or, you always have edit fuel, oil, and mileage permissions.

- Click on the edit  icon and apply the necessary updates.

**Fuel/Oil/Mileage** ✕

CURRENT MILEAGE/HOURS	MILEAGE/HOURS ODOMETER	MILES/HOURS USED
	<input type="text" value="13701"/>	-
DATE OF INFO	OFF DUTY MILES	
<input type="text" value="12/04/2019 1131"/>	<input type="text"/>	
FUEL GALLONS	TOTAL FUEL COST	SERVICE INTERVAL
<input type="text" value="23"/>	<input type="text" value="50.37"/>	<input type="text" value="-Select-"/>
OIL QUANTITY	TOTAL OIL COST	FUEL TYPE
<input type="text" value="1"/>	<input type="text" value="5.5"/>	<input type="text" value="Regular"/>
OTHER FLUID TYPE	OTHER FLUID COST	
<input type="text" value="Washer Fluid"/>	<input type="text" value="3.25"/>	
COMMENTS		
<input type="text"/>		
PAYMENT TYPE	PAYMENT ID	
<input type="text" value="-Select-"/>	<input type="text"/>	
<input checked="" type="radio"/> SELECT VENDOR <input type="radio"/> SPECIFY VENDOR		
<input type="text" value="-Select-"/>		
<input type="button" value="Hide Fields"/>		<input type="button" value="Cancel"/> <input type="button" value="Save"/>

**NOTE:** As a Fleet Officer you cannot update or delete **Fuel, Oil, Mileage** records created by another user.

Optionally, click the **Hide Fields** button to display only relevant fields for which you need to supply data.

- Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Mileage Tab** without saving.


### Delete Fuel, Oil, Mileage

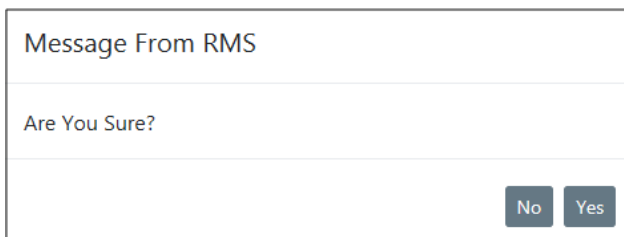
You can delete records under the following conditions:

- You are the creator of the record and the system time is within the configured lock hours of the creation date.

For example, when the lock hours are set to 100, you can delete the record if you are the creator, and today is within 100 hours of record creation.

For more information on lock hours, refer to your agency administrator.





- Or, you always have delete fuel/oil/mileage permissions.
- Click on the delete icon  to delete a Fuel/Oil/Mileage Record.
  - A confirmation window appears. Click **Yes** to delete or **No** to return to the **Fuel/Oil/Mileage** window without deleting.




### Self-Assign Vehicles

As Fleet Officer you can assign yourself to vehicles that are not on your **Current Assignment** list by searching for the vehicles first.

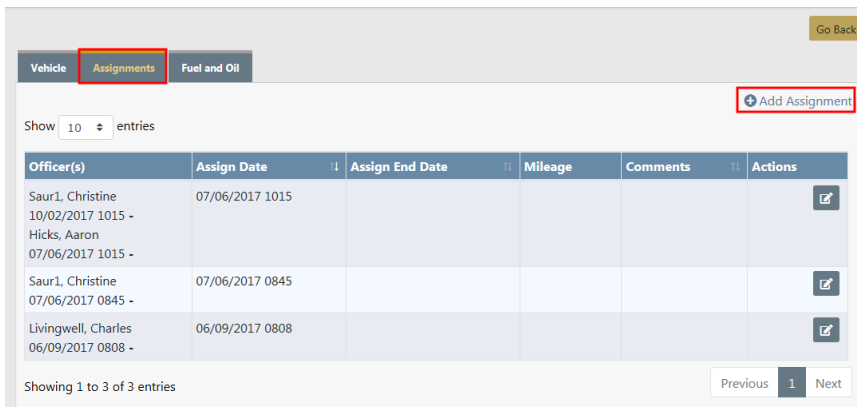
- Click the **Search Vehicles** button on the **Fleet Vehicle Assignments** window list.

Unit #	Make	Model	License #	Assignment Start Date	Assignment End Date	Actions
63	FORD/COURIER/FORD	AURUS GOLDLINE CAMPER (FORD)	987aaa	12/18/2018		 
123	HONDA/AMERICAN HONDA MOTOR CO, INC(HOND)	PILOT	1	12/17/2018		 

- Enter the vehicle details into the **Fleet Vehicle Search** window then click **Search**. For detailed instructions on how to search for vehicles refer to "Search All Vehicles " on page 635.
- Click the edit  icon to the right of the vehicle in the **Fleet Vehicle Search Results** window you want to assign.

**NOTE:** Vehicles with a status of *Sold* or *Out of Service* cannot be edited by an officer.

- 4. Click on the **Assignments** tab from the **Edit Fleet Vehicle** window.

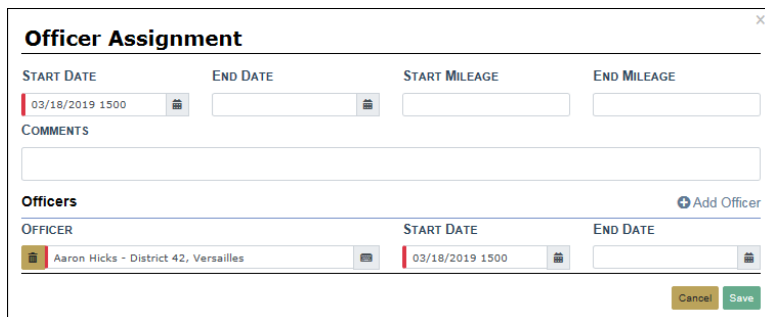


Click **Go Back** to return to the **Fleet Vehicle Search Results** window, if you wish.

- 5. Officers can be assigned two ways: Add yourself to new or existing assignment.

### Add Yourself to a New Assignment

- a. Click on **Add Assignment** on the **Edit Fleet Vehicle** window to create a new assignment and enter the necessary data in the *Officer Assignment* window that appears as shown below.



The **Officer** defaults to you and cannot be changed.

**NOTE:** Required fields display a red border to the left of the field.

- b. Enter your **Start Date**.
- c. Click **Save** to create the assignment, or click **Cancel** to return to the **Assignments Tab** without saving.

### Add Yourself to an Existing Assignment

- a. Locate the Assignment in the **Edit Fleet Vehicle** window, then click the edit icon to display the *Officer Assignment* window.

START DATE	END DATE	START MILEAGE	END MILEAGE
03/18/2019 1510			

COMMENTS

---

**Officers**

OFFICER	START DATE	END DATE
Aaron Hicks	03/18/2019 1510	

The bottom **Officer** defaults to you and cannot be changed. Other fields in gray cannot be changed.

**NOTE:** Required fields display a red border to the left of the field.

- b. The **Start Date** defaults to the current date but may be changed.
- c. Enter the **End Date** and **Comments**, if applicable.

**NOTE:** To end the Assignment, there must be an **End Date** on the Assignment itself.

- d. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.

**NOTE:** You can create or edit *Fuel and Oil* and *Service Requests* for the vehicle once you have assigned yourself to the vehicle. For details refer to "Manage Fuel, Oil, and Mileage" on page 641.

Your new assignment puts the vehicle in ODL and sets status to *Assigned*. The new assignment also appears in your **Current Assignments** window.

### End Self-Assignments

To close an entire Assignment that you assigned to yourself, you must enter the **End Date** on both the *Officer Assignment* and *Officers* sections. You cannot close an Assignment that was created by another user.

START DATE	END DATE	START MILEAGE	END MILEAGE
03/18/2019 1513	03/20/2019 1513	2300	3105

COMMENTS

---

**Officers**

OFFICER	START DATE	END DATE
Aaron Hicks	03/18/2019 1513	03/20/2019 1513

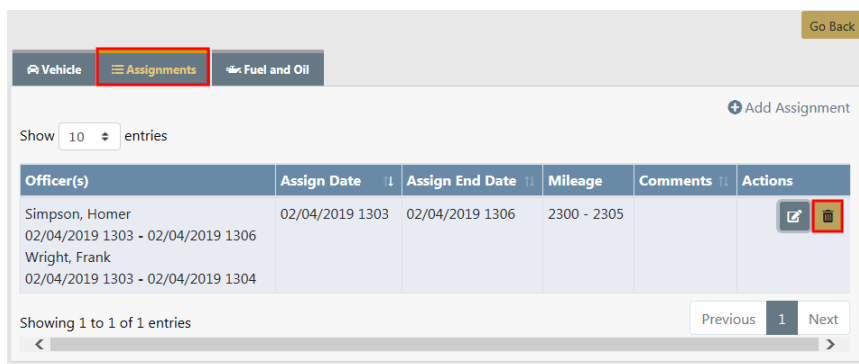
**NOTE:** The End Dates must be on or before the Assignment End Date.


6. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.

### Delete Assignments

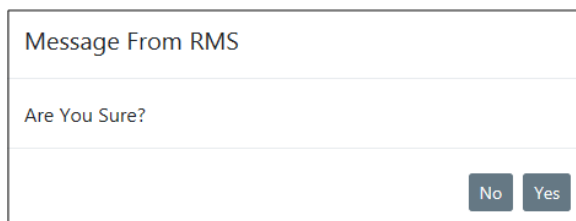
You may delete assignments that are created by you, and only when you are the only officer on the assignment.

1. Locate the assignment to delete then click on the Delete icon .




**NOTE:** You do not have the authority to delete assignments without a Delete icon  under the *Actions* column.

2. A confirmation window appears. Click **Yes** to delete or **No** to exit without deleting.



### Delete Data

Click the Delete icon  to delete records that were created by you. If the Delete icon does not exist, then you do not have the ability to delete. While Service Requests are



used in the example below, the same procedure applies to other areas of the application.

Service Requests					+ Add Service Request	
Type	Status	Request Date	Description	Actions		
Equipment	Pending	12/19/2018	testing coming from ODL			

The following confirmation screen appears.

Message From RMS

---

Are You Sure?

Click **Yes** to delete or **No** to return to the previous window without deleting.

## Fleet Clerk

By having the **Fleet Clerk** permission category, you can perform the following in the **Fleet Management** module:

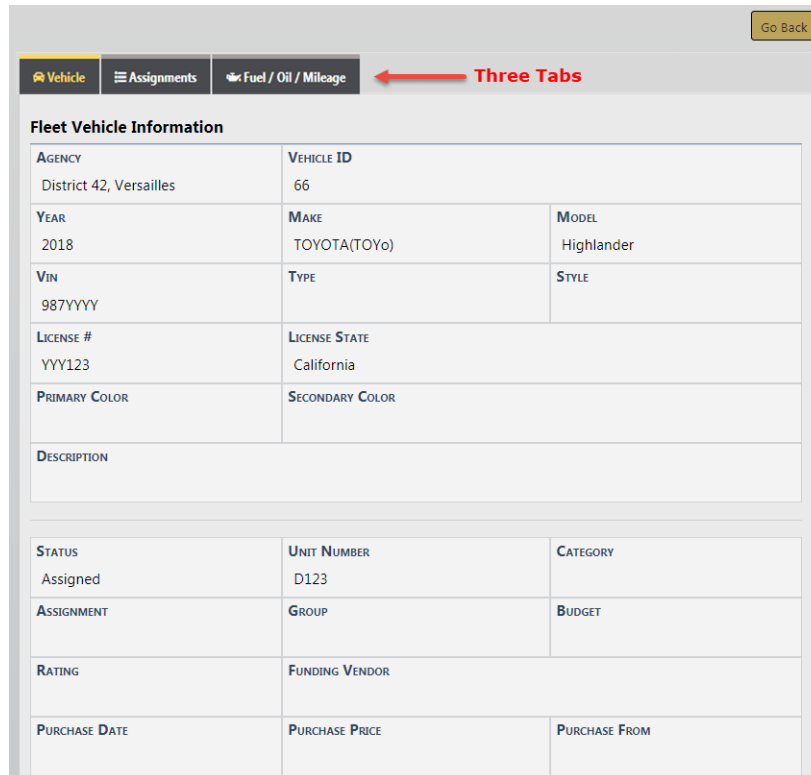
- View fleet vehicles.
- You can add fuel, oil & mileage records to fleet vehicle records.
- You can edit fuel, oil & mileage records only if you are the creator and only within the lock hours.

**NOTE:** Fleet Managers and Administrators have the ability to add, update, and delete Fleet Vehicles that were created by others if given appropriate permissions.

To access Fuel, Oil, & Mileage:

1. Click on the **Records Management** menu then **Fleet Management** sub-menu to open the Fleet Vehicle Search page.
2. Search for and select the Vehicle.

**NOTE:** For more information on searching and selecting, refer to "Search Vehicles" on the facing page.



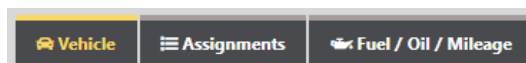
Go Back

Vehicle Assignments Fuel / Oil / Mileage ← Three Tabs

**Fleet Vehicle Information**

AGENCY District 42, Versailles	VEHICLE ID 66	
YEAR 2018	MAKE TOYOTA(TOYo)	MODEL Highlander
VIN 987YYYY	TYPE	STYLE
LICENSE # YYY123	LICENSE STATE California	
PRIMARY COLOR	SECONDARY COLOR	
DESCRIPTION		
STATUS Assigned	UNIT NUMBER D123	CATEGORY
ASSIGNMENT	GROUP	BUDGET
RATING	FUNDING VENDOR	
PURCHASE DATE	PURCHASE PRICE	PURCHASE FROM

The **View Fleet Vehicle** window contains three tabs:



#### Vehicle

- Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. This tab opens by default.

#### Assignments

- A history of officers assigned to the vehicle, along with the dates.

#### Fuel/Oil/Mileage

- A summary of the type of fluids put in the vehicle with dates, along with mileage. Access this tab to add records, or update records if you are the creator and only if within the lock hours.

**NOTE:** The Vehicle and Assignment tabs are read-only.


Click on the **Fuel/Oil/Mileage** tab to add, update, or delete records. Refer to "Search Vehicles" below for details.

Or, click on the **Go Back** button to return to the previous window.











### Search Vehicles

1. Click on the **Records Management** menu then **Fleet Management** sub-menu to open the Fleet Vehicle Search page.


The screenshot shows the 'Fleet Vehicle Search' interface. It features a 'Go Back' button in the top right corner. The search criteria are organized into several sections: AGENCY (dropdown menu showing 'Indiana State Police'), YEAR, MAKE, MODEL, VIN, TYPE, STYLE, LICENSE #, LICENSE STATE, MISC ID TYPE, MISC ID VALUE, FLEET ID, SERVICE REQUEST STATUS, STATUS, UNIT NUMBER, CATEGORY, ASSIGNMENT, GROUP, BUDGET, RATING, CURRENT MILEAGE, DELINQUENT MILEAGE (checkbox), MAINTENANCE DATE FROM, MAINTENANCE DATE TO, MAINTENANCE MILES FROM, MAINTENANCE MILES TO, and ADDITIONAL SEARCH CRITERIA. At the bottom of the form are three buttons: 'Go Back', 'Reset', and 'Search'.

**NOTE:** The Agency of the vehicle defaults to the Agency of the logged in user; however, you can change it to any agency within the organization by clicking on the  .

2. Enter various pieces of information about the vehicle, such as VIN, Make, Model, etc., then click **Search** to display the results.

Vehicle ID	Unit Number	Make	Model	Agency	Assigned Officers	Purchased Date	Current Mileage	Actions
69	DMM3			District 42, Versailles	Charles (cid) Goodman Badge# 303			 
68	DMM2			District 42, Versailles				 
67	DMM2			District 42, Versailles				 
66	D123	TOYOTA(TOYo)	Highlander	District 42, Versailles	Benjamin (cid) Harrison Badge# 306, Ralphie (off) Lauren Badge# 1010		131001	 
64				District 42, Versailles	Ralphie (off) Lauren Badge# 1010		20012	 

### Add Fuel , Oil, and Mileage

1. Locate the vehicle you want to edit then click on the *Edit*  icon in the Actions column of the Search Results window to open the Edit Fleet Vehicle page.

[Go Back](#)

 Vehicle

 Assignments

 Fuel / Oil / Mileage

**Fleet Vehicle Information**

<b>AGENCY</b> District 42, Versailles		<b>VEHICLE ID</b> 63	
<b>YEAR</b> 2018	<b>MAKE</b> FORD/COURIER/FORD GOLDLINE CAMPER(FORD)	<b>MODEL</b> TAURUS	
<b>VIN</b> dfdfdfdf	<b>TYPE</b>	<b>STYLE</b>	
<b>LICENSE #</b> 987aaa		<b>LICENSE STATE</b>	
<b>PRIMARY COLOR</b>		<b>SECONDARY COLOR</b>	
<b>DESCRIPTION</b>			

2. Click on the **Fuel/OilMileage** tab, then click **Add Fuel/Oil/Mileage Record** to add a new record.

Mileage	Creator	Date of Info	Comments	Fuel / Oil	Costs	Payment	Actions
5242	Saur, Christine	02/13/2019 1400				Vendor: Caseys	
5060	Simpson, Homer	01/07/2019 1050		Fuel: 10			
5050	Hicks, Aaron	12/19/2018 0935		Fuel: 20 Oil: 20	Fuel: 20 Oil: 20 Fluid: 20	Payment: Credit Card Vendor: DMM	

**Fuel/Oil/Mileage**

CURRENT MILEAGE/HOURS: 13505

MILEAGE/HOURS ODOMETER:

MILES/HOURS USED: -

DATE OF INFO: 12/04/2019 1131

OFF DUTY MILES:

SERVICE INTERVAL: -Select-

Show Fields **Click to show all hidden fields**

Cancel Save

Only relevant fields for which you need to supply data display automatically.

Click the **Show Fields** button to display all available fields.

**NOTE:** Required fields display a red border to the left of the field.

- The *Current Mileage/Hours* and *Miles/Hours Used* fields are both read-only.
- Fields with a down arrow  supply a list of values from which to choose. Click on the field then choose from the list that appears.
- **Service Interval** allows you to select the number of miles until the next service. The list values are configured by the agency. For details, refer to your administrator.

SERVICE INTERVAL

-Select-

5,000

10,000

15,000

20,000

25,000

30,000

35,000

40,000

45,000

50,000

55,000

60,000

65,000

3. Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Mileage** tab without saving.
4. If you chose to click **Save**, the record appears under the **Fuel/Oil/Mileage** tab of the **Edit Fleet Vehicle** screen.

The **Current Mileage** looks at service maintenance records and fuel/oil/mileage records to find the max mileage entered for the vehicle.

The **Cost of Ownership** displayed on the **Vehicle Tab** reflects the *Purchase Price + All Fuel & Oil Costs + All Service Maintenance Costs* entered for the vehicle.

Mileage	Creator	Date of Info	Comments	Fuel / Oil	Costs	Payment	Actions
5535	Smith, Johnny	03/23/2020 1431					
5242	Saur, Christine	02/13/2019 1400				Vendor: Caseys	
5060	Simpson, Homer	01/07/2019 1050		Fuel: 10			
5050	Hicks, Aaron	12/19/2018 0935		Fuel: 20 Oil: 20	Fuel: 20 Oil: 20 Fluid: 20	Payment: Credit Card Vendor: DMM	

Showing 1 to 4 of 4 entries

The *Edit* and *Delete* icons appear on fuel/oil/mileage records to which you have appropriate permissions.

### Edit Fuel , Oil, and Mileage

You can edit records under the following conditions:

- You are the creator of the record and the system time is within the configured lock hours of the creation date.

For example, when the lock hours are set to 100, you can edit the record if you are the creator, and today is within 100 hours of record creation.

For more information on lock hours, refer to your agency administrator.

- Or, you always have edit fuel and oil permissions.
1. Click on the edit icon and apply the necessary updates.

2. Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Mileage Tab** without saving.

### **Delete Fuel , Oil, and Mileage**


You can delete records under the following conditions:

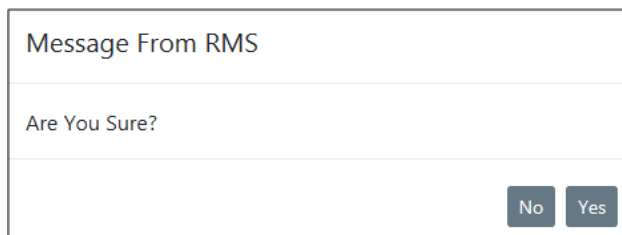
- You are the creator of the record and the system time is within the configured lock hours of the creation date.

For example, when the lock hours are set to 100, you can delete the record if you are the creator, and today is within 100 hours of record creation.

For more information on lock hours, refer to your agency administrator.

- Or, you always have delete fuel and oil permissions.

1. Click on the delete icon  to delete a Fuel/Oil/Mileage Record.
2. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Fuel/Oil/Milage** window without deleting.



A confirmation dialog box with a white background and a thin grey border. The title bar at the top reads "Message From RMS". Below the title bar, the text "Are You Sure?" is centered. At the bottom right of the dialog, there are two buttons: "No" and "Yes", both in a dark grey color with white text.





# Chapter 32. Lost and Found Property

## Lost and Found Property Overview

The **Lost and Found Property** module allows you to create, save, and edit *Master Property* records and mark them as lost. The **Lost and Found Property** module is included with the full subscription of Online RMS, though it is disabled for initial deployment. Please contact Caliber Support if your agency would like this module enabled.

When the module is enabled, user access is controlled by permissions configured by your administrator. For more information on permissions see your administrator.

This module utilizes the **Master Property Index**, where property data is represented only once for consistency. **Master Property** data is easily transferred to a new **Lost and Found Property** record by searching the **Master Property Index** for the appropriate property record. For more information on **Master Indices** refer to "Master Indices" on page 71.

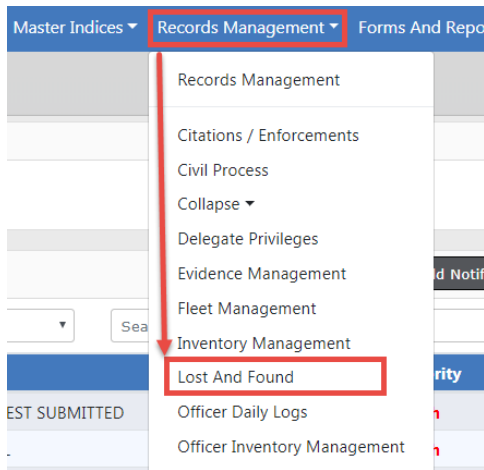
**Lost and Found Property** can be created and managed two ways within Online RMS:

- From the **Standalone Module** by selecting the *Lost and Found* option under the *Records Management Menu*.
- **Incident Lost and Found Property** (similar to logging property as evidence).

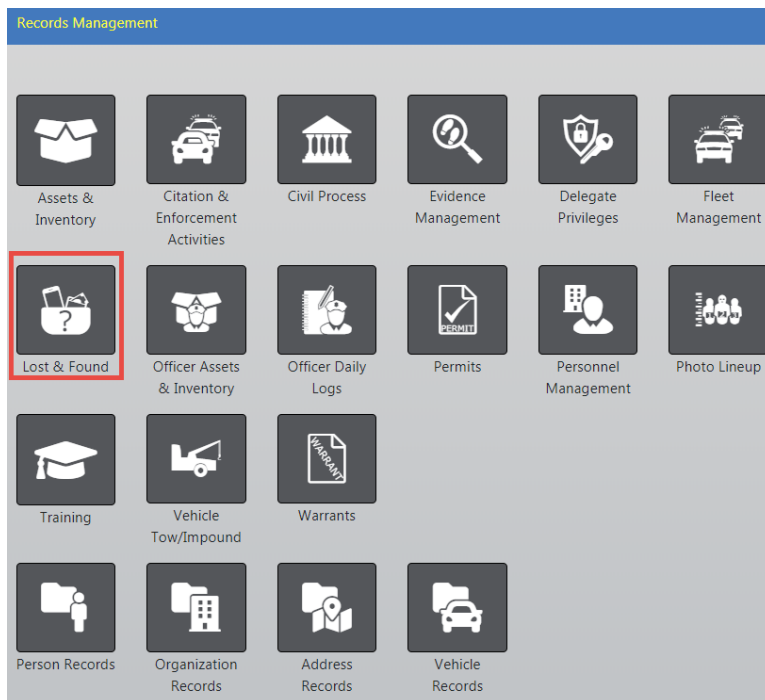
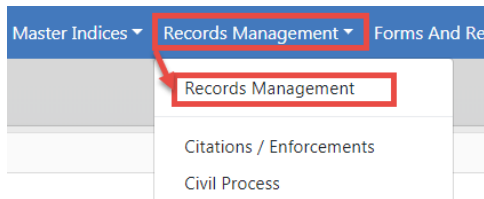
## Standalone Module

There are two ways to access the **Lost & Found Standalone Module**:

- Click the **Records Management Menu** then click the **Lost and Found** submenu option.



- Click on the **Records Management Menu** then click on the **Lost & Found** link.



The *Property Lost & Found Search* screen appears. Click on the **Add New Lost & Found** button to create a new **Lost & Found** record if necessary.

[Add New Lost & Found](#)

### Property Details

INDEX ID	SERIAL NUMBER	DESCRIPTION
<input type="text"/>	<input type="text"/>	<input type="text"/>

CATEGORY

All  Property  Drugs  Document  Currency  Guns

### Lost & Found Details

AGENCY	ID	FOUND BY	INCIDENT REPORT #
<input type="text" value="District 42, Versaill"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
FOUND DATE FROM	FOUND DATE TO	CREATED DATE FROM	CREATED DATE TO
<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>

COMMENTS

### Current Custody

LOCATION	FIRST NAME	LAST NAME
<input type="text" value="-Select-"/>	<input type="text"/>	<input type="text"/>

### Disposition

DISPOSED	DISPOSITION DATE FROM	DISPOSITION DATE TO	DISPOSITION REASON
<input type="text" value="-Select-"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text" value="-Select-"/>
RELEASED TO	COMMENTS		
<input type="text"/>	<input type="text"/>		

[Go Back](#) [Reset](#) [Search](#)

For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" below .

## Search Lost and Found Property

Access the **Lost & Found** Standalone Module to begin the search. For more information on accessing the module refer to "Standalone Module" on page 657.

The *Property Lost & Found Search* screen appears.

Add New Lost & Found

### Property Details

INDEX ID	SERIAL NUMBER	DESCRIPTION
<input type="text"/>	<input type="text"/>	<input type="text"/>

CATEGORY

All 
  Property 
  Drugs 
  Document 
  Currency 
  Guns

### Lost & Found Details

AGENCY	ID	FOUND BY	INCIDENT REPORT #
<input type="text" value="District 42, Versail"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
FOUND DATE FROM	FOUND DATE TO	CREATED DATE FROM	CREATED DATE TO
<input type="text" value=""/> <input type="calendar"/>	<input type="text" value=""/> <input type="calendar"/>	<input type="text" value=""/> <input type="calendar"/>	<input type="text" value=""/> <input type="calendar"/>

COMMENTS

### Current Custody

LOCATION	FIRST NAME	LAST NAME
<input type="text" value="-Select-"/>	<input type="text"/>	<input type="text"/>

### Disposition

DISPOSED	DISPOSITION DATE FROM	DISPOSITION DATE TO	DISPOSITION REASON
<input type="text" value="-Select-"/>	<input type="text" value=""/> <input type="calendar"/>	<input type="text" value=""/> <input type="calendar"/>	<input type="text" value="-Select-"/>
RELEASED TO	COMMENTS		
<input type="text"/>	<input type="text"/>		

Go Back Reset Search

Choose one **Category** to display additional search fields. The search fields change based on the selected **Category**.

Add New Lost & Found

### Property Details

INDEX ID	SERIAL NUMBER	DESCRIPTION
<input type="text"/>	<input type="text"/>	<input type="text"/>

CATEGORY

All 
  Property 
  Drugs 
  Document 
  Currency 
  Guns

TYPE	Misc/OAN	MAKE	MODEL
<input type="text" value="-Select-"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
PRIMARY COLOR	SECONDARY COLOR	QUANTITY	
<input type="text" value="-Select-"/>	<input type="text" value="-Select-"/>	<input type="text"/>	

Enter all search criteria then click the **Search** button to view the *Search Results*.

ID	Agency	Property	Found By	Date Found	Current Custody	Custody Date	Actions
35	District 42, Versailles	ANTIQUES	Officer Saur	11/13/2017 0723	Safe in Storage Room	11/13/2017 1703	[Lock] [Edit] [Dispose]
15	District 42, Versailles	ANTIQUES	Joshua	08/23/2017 0300	Disposed	08/23/2017 1551	[Edit] [Dispose]
2	District 42, Versailles	ANTIQUES	Dana McMillan2	08/22/2017 0400	Disposed	08/23/2017 0905	[Edit] [Dispose]

Click **New Search** to start a new search, or **Refine Search** to modify your search.

You can **Export** the *Search Results* to a file by clicking on one of the export icons. For more information on exporting *Search Results* refer to "Export Search Results" on page 31.

From the *Search Results* window you can handle one record, or multiple records at once.

### Specific Record

**Dispose, Edit, or Delete** a specific record.



If an icon does not appear in the *Actions* column then you do not have proper permissions to perform that *Action*. For example, if the **Dispose** icon does not appear then you do not have permissions to **Dispose** that record. For more information on permissions refer to your administrator.

## Multiple Records

Online RMS provides a function to process multiple **Lost & Found** records at once. **Mass Dispose**, **Mass Change Custody**, and **Print Labels** buttons appear when one or more records on the *Property Lost & Found Search Results* screen are selected. Click one of the three buttons to process all selected records.



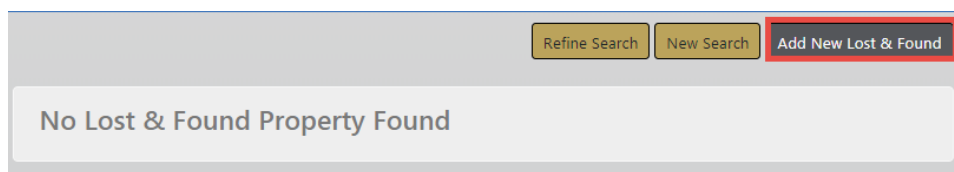
ID	Agency	Property	Found By	Date Found	Current Custody	Custody Date	Actions
35	District 42, Versailles	ANTIQUES	Officer Saur	11/13/2017 0723	Safe in Storage Room	11/13/2017 1703	[Lock] [Print] [Trash]
15	District 42, Versailles	ANTIQUES	Joshua	08/23/2017 0300	Disposed	08/23/2017 1551	[Print] [Trash]
2	District 42, Versailles	ANTIQUES	Dana McMillan2	08/22/2017 0400	Disposed	08/23/2017 0905	[Print] [Trash]

For more information on processing records in bulk refer to "Mass Lost and Found Functions" on page 670.

## Add Lost and Found Property

Before you add a new record, first search to ensure it doesn't already exist. For more information on searching, refer to "Search Lost and Found Property" on page 659

The search results displays a message when the record you are searching for does not exist.



## Create a New Master Property Index Record

If the record you are searching for does not appear in the *Lost & Found Search Results* then it's likely it does not exist in the index, so you need to create it.

Click on the **Add New Lost & Found** button on the top right of the *Lost & Found Search Results* window to display the *Add Property* screen.

Choose one **Category** on the *Add Property* screen. Additional fields appear based on the selected **Category** as shown in the below examples.

The screenshot shows the 'Property Information' form with the 'CATEGORY' dropdown set to 'PROPERTY'. The 'PROPERTY' radio button is selected and highlighted with a red box. The form includes fields for SECURITY LEVEL (Level 1 - Access to all Data), TYPE (WATCH), SERIAL # (AC12345), MISCELLANEOUS / OAN, VALUE (500.00), MAKE (Timex), MODEL (Easy Reader), PRIMARY COLOR (Gold), SECONDARY COLOR (-Select-), QUANTITY (1), ITEM DESCRIPTION (Woman's watch.), DATE OF INFO (3/18/2019), and COMMENTS. Buttons for 'Go Back', 'Save', and 'Save & Select' are at the bottom.

The screenshot shows the 'Property Information' form with the 'CATEGORY' dropdown set to 'DOCUMENTS'. The 'DOCUMENTS' radio button is selected and highlighted with a red box. The form includes fields for SECURITY LEVEL (Level 1 - Access to all Data), TYPE (CREDIT CARDS), BANK, DOCUMENT NUMBER, DATE, ACCOUNT NAME, ACCOUNT #, PAYABLE TO, AMOUNT, ENDORSEE, ITEM DESCRIPTION, DATE OF INFO (3/18/2019), and COMMENTS. Buttons for 'Go Back', 'Save', and 'Save & Select' are at the bottom.

The screenshot shows the 'Property Information' form with the 'CATEGORY' dropdown set to 'DRUGS'. The 'DRUGS' radio button is selected and highlighted with a red box. The form includes fields for SECURITY LEVEL (Level 1 - Access to all Data), TYPE (PLANT), DRUG TYPE (SUSPECTED MARIJUANA), QUANTITY, MEASURE (-Select-), ITEM DESCRIPTION, DATE OF INFO (3/18/2019), and COMMENTS. Buttons for 'Go Back', 'Save', and 'Save & Select' are at the bottom.

**NOTE:** Required fields display a red border to the left of the field.

Enter the necessary data. then click **Save & Select** to transfer the newly added record to a new *Lost & Found* record.

### Create the Property Lost & Found Record

The new property record you just created transfers into the **Add Property Lost & Found** screen.

Go Back

Property Information transferred from Master Property					
TYPE	MAKE	MODEL	SERIAL #	COLORS	QUANTITY
WATCH	Timex	Easy Reader	TIME1234	Gold	1
VALUE(\$)	DATE OF INFO	INDEX ID			
400	03/07/2019	1859			

Location / Person		
FOUND BY	DATE / TIME FOUND	CUSTODY DATE / TIME

**NOTE:** Required fields display a red border to the left of the field.

Enter the remaining lost and found information then click **Save** to open the *Edit Lost & Found* screen.

For more information on editing lost and found records, refer to "Edit Lost and Found Property" below.

### Edit Lost and Found Property

Access the **Lost & Found Standalone Module** then search for the record(s) you want to **Edit**.

For more information on accessing the Standalone Module refer to "Standalone Module" on page 657.

For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 659.

From the *Search Results* window click on the **Edit** icon on the record you want to update.

Refine Search   New Search   Add New Lost & Found

39 result(s) found   Previous 1 2 Next

ID	Agency	Property	Found By	Date Found	Current Custody	Custody Date	Actions
42	District 42, Versailles	PLANT		01/01/2019 1534	Disposed	02/15/2019 1534	
<input type="checkbox"/> 41	District 42, Versailles	ALCOHOL/LIQUOR	dana	03/27/2018 1000	ISP location	03/27/2018 1317	
<input type="checkbox"/> 40	District 42, Versailles	AMMUNITION	dana	03/27/2018 0010	Back Room	03/27/2018 1315	
<input type="checkbox"/> 39	District 42, Versailles	WATCH	Dana	03/27/2018 0545	Front Counter	03/27/2018 1300	
<input type="checkbox"/> 38	District 42, Versailles	BANK RECORDS	Nelly Botch	03/27/2018 0000	, Truth, Kat, ID# 253523	03/27/2018 1246	



**NOTE:** **Disposed** records cannot be updated unless you have *Edit Disposition Information* permissions. For more information on permissions refer to your administrator.

The *Edit Property Lost & Found* screen appears. The *Master Property* information appears on the top section, *Lost & Found Property* information on the middle section, and *Chain of Custody* information on the bottom section.

Go Back Dispose Print Label

**Property** [View Property Details](#) [Update Property Details](#)

TYPE	QUANTITY	VALUE(\$)	DATE OF INFO	INDEX ID
ALCOHOL/LIQUOR	0	100	04/08/2019	1908

**Lost & Found Details** **Master Property Index Section**

ID: 55 FOUND BY: [ ] DATE / TIME FOUND: 04/08/2019 1040

COMMENTS: [ ]

Save

**Incident**

Report #	Agency	Occurrence Date	Location	Actions
2017-11-317-000025	District 42, Versailles	11/13/2017 0945	500 South Oak Street Fortville, IN 46040	[ ]

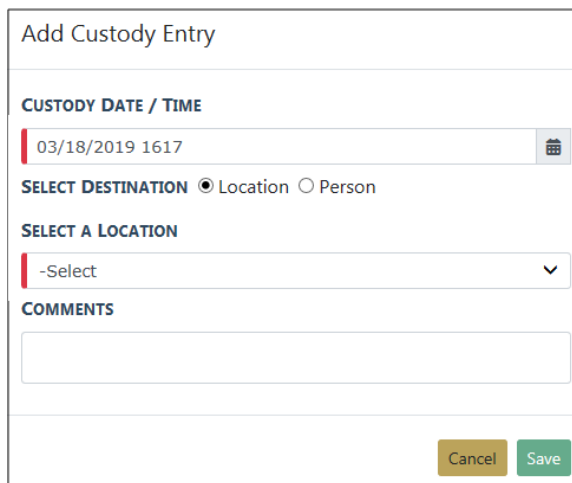
**Chain of Custody** [Print Chain of Custody](#) [Change Custody](#)

Search: [ ]

Custody Date	Person / Location	Creator	Comments
04/08/2019 1040	Back Room	Homer Simpson	

With the proper permissions, you can click on the **View Property Details** or **Update Property Details** link to **View** or **Edit** the *Master Property Index* record respectively. For more information on permissions refer to your administrator.

Click on the **Change Custody** link to display the *Add Custody Entry* screen.

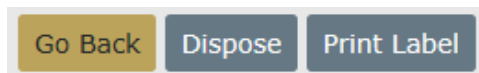


Select either **Location** or **Person**.

- If you selected **Location** then select a Location from the displayed list.
- If you selected **Person** then enter part of the officer's name in the text box and select the appropriate name that appears in a list.

Select **Save**.

You can also **Dispose** the selected record, or **Print Label**.



**NOTE:** For more information on how to **Dispose** a record refer to "Dispose Lost and Found Property" on the facing page.

## Delete Lost and Found Property

Access the **Lost & Found** Standalone Module then search for the record(s) you want to **Delete**.

For more information on accessing the Standalone Module refer to "Standalone Module" on page 657.

For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 659.

From the *Search Results* window click on the **Delete** icon in the *Actions* column on the record you want to delete.

ID	Agency	Property	Found By	Date Found	Current Custody	Custody Date	Actions
42	District 42, Versailles	PLANT		01/01/2019 1534	Disposed	02/15/2019 1534	
<input type="checkbox"/> 41	District 42, Versailles	ALCOHOL/LIQUOR	dana	03/27/2018 1000	ISP location	03/27/2018 1317	
<input type="checkbox"/> 40	District 42, Versailles	AMMUNITION	dana	03/27/2018 0010	Back Room	03/27/2018 1315	

A confirmation window appears.

Message From RMS

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Are You Sure?

Click **Yes** to delete or **No** to return to the *Search Results* window without deleting.

## Dispose Lost and Found Property

**Dispose** is considered the end of life for the **Lost & Found** record(s).

Access the **Lost & Found** Standalone Module then search for the record(s) you want to **Dispose**.

For more information on accessing the Standalone Module refer to "Standalone Module" on page 657.

For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 659.

From the *Search Results* window you can **Dispose** multiple records at once, or a specific record.

ID	Agency	Property	Found By	Date Found	Current Custody	Custody Date	Actions
<input type="checkbox"/> 35	District 42, Versailles	ANTIQUES	Officer Saur	11/13/2017 0723	Safe in Storage Room	11/13/2017 1703	
15	District 42, Versailles	ANTIQUES	Joshua	08/23/2017 0300	Disposed	08/23/2017 1551	
2	District 42, Versailles	ANTIQUES	Dana McMillan2	08/22/2017 0400	Disposed	08/23/2017 0905	

## Dispose Multiple (Mass) Records

Select all records you want to **Dispose**, then click the **Mass Dispose** button.

ID	Agency	Property	Found By	Date Found	Current Custody	Custody Date	Actions	
<input checked="" type="checkbox"/>	35	District 42, Versailles	ANTIQUES	Officer Saur	11/13/2017 0723	Safe in Storage Room	11/13/2017 1703	[Icons]
<input type="checkbox"/>	15	District 42, Versailles	ANTIQUES	Joshua	08/23/2017 0300	Disposed	08/23/2017 1551	[Icons]
<input type="checkbox"/>	2	District 42, Versailles	ANTIQUES	Dana McMillan2	08/22/2017 0400	Disposed	08/23/2017 0905	[Icons]

For more information on the mass functions refer to "Mass Lost and Found Functions" on page 670

## Dispose a Specific Record

Locate the record you want to **Dispose** of then click the **Dispose** icon to display the *Lost & Found Disposition* screen.



**NOTE:** If the **Dispose** icon does not appear then you do not have proper permissions to perform that *Action*.

Id	Property	Current Custody	Custody Date
42	Type: PLANT Drug: SUSPECTED MARIJUANA Quantity: 0	Back Room	02/15/2019 1534

**Disposition Information**

RELEASED TO:  ENTER NAME  SELECT PERSON

PERSON: [Text Box]

RELEASED BY: [User, ODL, ID# 123456]

DISPOSITION DATE: [03/18/2019 1620]

DISPOSITION REASON: [-Select-]

COMMENTS: [Text Area]

[Signature] [Save]

Enter the necessary data in the fields provided.

- Click **Enter Name** of the person to whom the property will be released and enter their name in the text box, OR click **Select Person** then click on **Select Person** to choose a name from the *Master Person Index*.

RELEASED TO PERSON

Enter Name  Select Person

[Text Box]

OR

RELEASED TO PERSON

Enter Name  Select Person

[Select Person] [Select Incident Person]

For more information on the *Master Person Index* refer to [MASTERINDICES.htm](#).

- **Released By** name defaults to the logged in user; however, it can be changed.
- **Disposition Date** and **Time** defaults to the current data and time; however, it can be changed.
- Select a **Disposition** from the list.
- Enter any **Comments**.
- If required by your agency, click on the **Signature** button for signature.

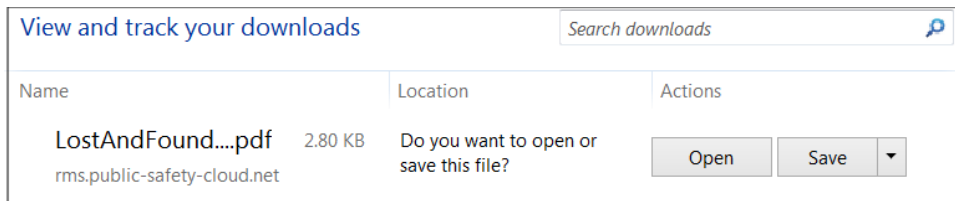
Click **Save** to display a successful confirmation message.

**Disposition Successful**

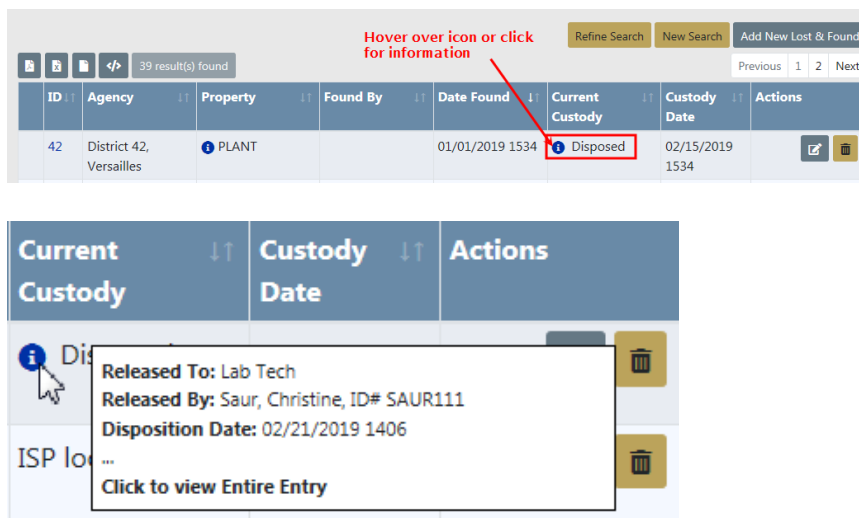
[Print Receipts] [Exit]

Click the **Print Receipts** button to print receipts, or click **Exit** to return to the *Search Results* screen without printing receipts.

If you chose to **Print Receipts** then you click **Open** to print, **Save** for more options, or **Cancel** to return to the *Search Results* screen.



**Disposed** appears on the property record in *Search Results*. Hover your mouse over or click on the blue circle to display detailed **Disposed** information.



## Mass Lost and Found Functions

**Mass Lost and Found Functions** allow you to process **Lost & Found** records in bulk. There are three bulk (mass) functions available:

- Dispose
- Change Custody
- Print Labels

To process records in bulk, access the **Lost & Found** Standalone Module then search for the record(s) you want to process in bulk.

For more information on accessing the Standalone Module refer to "Standalone Module" on page 657.

For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 659.

From the *Search Results* window select one or more records you want to process, and with the proper permissions, **Mass Dispose**, **Mass Change Custody**, and **Print Labels** buttons appears.

ID	Agency	Property	Found By	Date Found	Current Custody	Custody Date	Actions
42	District 42 Versailles	PLANT		01/01/2019 1534	Disposed	02/15/2019 1534	
<input checked="" type="checkbox"/>	District 42, Versailles	ALCOHOL/LIQUOR	dana	03/27/2018 1000	ISP location	03/27/2018 1317	
<input checked="" type="checkbox"/>	District 42, Versailles	AMMUNITION	dana	03/27/2018 0010	Back Room	03/27/2018 1315	
<input type="checkbox"/>	District 42, Versailles	WATCH	Dana	03/27/2018 0545	Front Counter	03/27/2018 1300	

### Mass Dispose

After selecting one or more records in the *Search Results* screen, click on the **Mass Dispose** button to display the *Lost & Found Disposition* screen.

**Properties Selected**

Id	Property	Current Custody	Custody Date
40	Type: AMMUNITION Make: adf Model: adsf Serial #: 1 Value(\$): 1	Back Room	03/27/2018 1315
41	Type: ALCOHOL/LIQUOR Make: asdf Value(\$): 0	ISP location	03/27/2018 1317

**Disposition Information**

RELEASED TO:  ENTER NAME  SELECT PERSON

PERSON:

RELEASED BY:

DISPOSITION DATE:

DISPOSITION REASON:

COMMENTS:

Enter the necessary data in the fields provided.

- Click **Enter Name** of the person to whom the property will be released and enter their name in the text box, OR click **Select Person** then click on **Select Person** to choose a name from the *Master Person Index*.

RELEASED TO	PERSON
<input checked="" type="radio"/> Enter Name <input type="radio"/> Select Person	<input type="text"/>

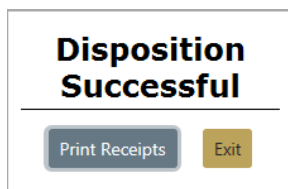
OR

RELEASED TO	PERSON
<input type="radio"/> Enter Name <input checked="" type="radio"/> Select Person	<input type="button" value="Select Person"/> <input type="button" value="Select Incident Person"/>

For more information on the *Master Person Index* refer to [MASTERINDICES.htm](#).

- **Released By** name defaults to the logged in user; however, it can be changed.
- **Disposition Date** and **Time** defaults to the current data and time; however, it can be changed.
- Select a **Disposition** from the list.
- Enter any **Comments**.
- If required by your agency, click on the **Signature** button for signature.

Click **Save** to display a successful confirmation message.



**NOTE:** **Disposed** records cannot be updated unless you have *Edit Disposition Information* permissions. For more information on permissions refer to your administrator.

### **Mass Change Custody**

After selecting one or more records in the *Search Results* screen, click on the **Mass Change Custody** button to display the *Mass Change Custody* screen.



The screenshot shows a web interface for managing lost and found property. At the top right is a 'Go Back' button. Below it is a table titled 'Properties Selected' with columns for Id, Property, Current Custody, and Custody Date. Two rows are visible: one for Ammunition and one for Alcohol/Liquor. Below the table is a 'Custody Information' section with a 'CUSTODY DATE' field (03/18/2019 1633), a 'SELECT DESTINATION' section with radio buttons for 'LOCATION' (selected) and 'PERSON', and a 'SELECT A LOCATION' dropdown menu. A 'COMMENTS' text area is at the bottom, followed by a 'Save' button.

Id	Property	Current Custody	Custody Date
40	Type: AMMUNITION Make: adf Model: adsf Serial #: 1 Value(\$): 1	Back Room	03/27/2018 1315
41	Type: ALCOHOL/LIQUOR Make: asdf Value(\$): 0	ISP location	03/27/2018 1317

**Custody Information**

CUSTODY DATE  
03/18/2019 1633

SELECT DESTINATION:  LOCATION  PERSON

SELECT A LOCATION: -Select

COMMENTS

Save

Enter the necessary data in the fields provided.

- Click **Location** and select the location from the list, OR click **Person** then enter part of the officer's name and choose the appropriate name from the list that appears.
- The **Customer Date** and **Time** defaults to the current date and time. You can change it if necessary.
- Enter any **Comments**.

Click **Save**.

**NOTE:** Online RMS creates a new *Chain of Custody* with the entered information for each selected **Lost & Found** property record.

## Print Labels

After selecting one or more records in the *Search Results* screen that need a label, click the **Print Labels** button.

## Incident Report Lost and Found

**Lost & Found** property can be created from the *Property & Vehicles* tab on the *Incident Report* and marked as **Lost & Found**. You can choose to single or mass properties.

**NOTE:** The **Lost & Found** module must be turned on for your agency to utilize this module and functionality.

The screenshot displays the 'Incident Report' interface. At the top, there are buttons for 'Exit Report', 'Quick Print', 'Print', 'Transfer', 'Exit Wizard', and 'Submit For Approval'. Below these are tabs for 'Summary', 'Header', 'Offenses', 'Names', 'Property & Vehicles', 'Narratives', 'Attachments', and 'Validations'. The 'Property & Vehicles' tab is selected and highlighted with a red box. The main content area shows 'Incident Summary: 02/20/2019 0907 Hrs' and 'Agency: District 42, Versailles'. Below this, it lists 'Offense(s): 14-29-8-5(2) - NATURAL RESOURCE- TRESPASS- CR...' and 'Report #: 2019D4210215 Supp #: 0'. At the bottom, there is a 'Properties' section with 'TOTAL VALUE(\$): 1500.00' and a dropdown menu set to 'All'. There are also buttons for 'Print Evidence' and 'Add Property' (highlighted with a red box).

For more information on Lost & Found from the *Property & Vehicles* tab on the *Incident Report* refer to "Incident Report Section – Property & Vehicles Tab" on page 193.

# Chapter 33. Expungements

## Expungements Overview

When an agency is required to expunge a record, the specifics on what needs to be expunged are contained in the court order.

**NOTE:** Please refer to your agency's policy on Expunging Records.

This document provides suggestions for accommodating the expungement order by deleting or modifying records contained in Online RMS.

### **If the order specifies an offender on an incident report:**

With appropriate permissions, you can expunge the offender from the report using the Offender incident expungement workflow. For workflow details, refer to "Expunge Offender or Arrestee" on page 679.

### **If the order specifies an arrest:**

With appropriate permissions, you can expunge an arrest record by using the Arrest Expungement process. For details, refer to "Expunge Field Arrest" on page 684.

### **If the order specifies to delete an Incident Report, Arrest, and all related information:**

It is easy to locate the Incident, and Arrest reports then delete them from Online RMS. When creating the delete comment, it may be beneficial to cite the court order.



### **Incidents**

Incident reports must be in Initial status to allow for deletion:

- If the report is in *Approved* status, refer to "Changing Incident Status" on page 229 for detailed instructions on changing the status to *Initial*.

For detailed instructions on deleting an Incident report, refer to "Delete Initial Incident Report" on page 235.

Below illustrates how to delete an initial report from Recent Activities, and the required comment dialog box:

Report #	Supp #	Summary	Actions
2020D4210280	0	07/25/2020 15:00 Hrs - 123 East Main Avenue North denver, CO 80401 - Offense(s) - 35-43-4-2 T68 - THEFT- POSSESS STOLEN PROPERTY	  

**Delete Incident**

---

Please enter a comment for deletion of 2020D4210280 Supp # 0

**COMMENT**

Cancel Delete

**NOTE:** Deleted reports are not recoverable from the database.

### Field Arrests/Citations/Field Contacts

If ordered, users with authority can delete Field Arrests, Citations, and Field Contacts using similar steps as with Incidents by first querying for the record.

To delete Field Arrests, refer to "Delete Field Arrest" on page 328.

To delete Citations, refer to "Delete Citation" on page 484.

To delete Field Contacts, refer to "Delete a Field Contact" on page 345.

### Investigative Case

If there is a follow-up Investigative Case associated with the Incident report, the delete process automatically removes the Incident from the associated Investigative Case.

- The associated Investigative Case should also be reviewed to delete any case comments that may reference the expunged person by name.

### Person Record

It is not necessary to delete a person record from Online RMS. Once an Incident report is deleted, the association to that report is deleted from the Master Indices Person record.

If preferred, an agency can choose to edit the Master Person record specified in the expungement order to change the person's name rather than delete the individual events.

As an example, some agencies change the person's name to the reference number of the expungement order to preserve the event records and remove any ability to find records when searching for the person's name. If this flow is preferred, keep in mind the individual records will need to be reviewed to remove the person from associated narratives or comment fields.

**Orders to expunge records need to be handled on a case-by-case basis.**

After reviewing your agency's current policy at the time of the order, and the decision is made on what records need to be deleted or edited, you can proceed to delete or edit those records within Online RMS. If you need further assistance, please submit a ticket to our Support Team.

## External Repositories

Caliber Online RMS contributes information from approved reports to external repositories such as NDEX. It may be necessary for agencies to expunge information contributed to these repositories by contracting them directly and following their expungement process.

## Interfaces

Your agency may contribute information to Caliber Online RMS through an interface with an external program. After the necessary information is expunged from Online RMS, you may need to contact the external vendor directly and follow their process to expunge the records in their program.

Examples of external interfaces are electronic ticket writers, crash reporting systems, and DWI/DUI reporting software.

## Un-Expunge

With proper permissions you can **Un-Expunge** an offender or arrestee on an Incident Report, or an entire Field Arrest. For more information, refer to "Un-Expunge" on page 687.

**NOTE:** Expunged records are not visible throughout Online RMS unless the user is granted permissions to view expunged details.

## Accessing the View Person Page

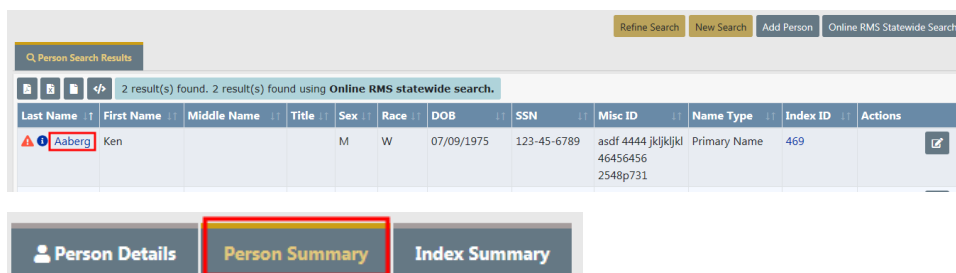
As with many areas of Online RMS, you can access the *View Person* page different ways:

- From the Master Person Record.

Search for the Master Person record by clicking on the **Master Indices** menu on the *Top Navigation Bar*, then click **Person** from the drop-down list to open the *Master Index Search* page.

Enter the person's last name, first name, or other information to yield the desired results, then click the **Search** button to open the *Person Search Results* page.

Click on the appropriate person's **last name** to open the *View Person* page, then click on the *Person Summary* tab.



**NOTE:** For more information on Master Indices refer to "Master Indices" on page 71.

- From the Incident Report.
  - Search for and view the Incident Report. For more information on searching and viewing Incident Reports, refer to "View Incident Reports" on page 222.
  - While on the Incident Report click on the **Names** tab or the **Offenders** link.

Incident Summary: 03/05/2018 1324 Hrs - 300 East 200 , East Tes...

Offense(s): 35-43-4-2.5 V02 - THEFT- VEHICLE

Total Hours: 0

Add Disapproval Comments

Actions 6 1 1 1 1 2

- Locate the Offenders grid then click on the person's **Name** to open the *View Person* page.

Offenders				
Name	Age (Yrs)	Role(s)	Supp #	Actions
Aaberg, Ken Race: White Sex: M DOB: 07/09/1975	42 Years Old	Suspect / Offender	0	

**NOTE:** For more information on viewing Incident Reports refer to "View Incident Reports" on page 222.

## Expunge Offender or Arrestee

You can expunge an offender or arrestee from a Incident Report, providing the Incident Report is *approved* and you have *Expunge Records* permissions. Refer to your system administrator for more information on *Expunge Records* permissions.

Incident **Expungements** apply to the offender only as there may be more than one offender.

The Person Summary tab on the *View Person* page displays an **Expunge** column in the Involved Incidents grid. A red Expunge icon appears in the **Expunge** column on records that qualify for expungement.

**NOTE:** For details on how to access the *View Person* page refer to "Accessing the View Person Page" on the previous page.

Locate the Incident Report on the Summary tab of the *View Person* page from which you want to **Expunge** the offender, then click on the red Expunge icon in the **Expunge** column to open the *Expunge Person* page.

Involved Incidents		
	Expunge	Report#
<input type="checkbox"/>		2018D4210186
<input type="checkbox"/>		2017-0120
<input type="checkbox"/>		2017-0091
<input type="checkbox"/>		2016-BCSO-000177
<input type="checkbox"/>		2016D4210025
<input type="checkbox"/>		2015ROOT0220
<input type="checkbox"/>	 ←	2015ROOT0162
		2015ROOT0156
		2015ROOT0154
<input type="checkbox"/>		0011315

On the *Expunge Offender* page, review the Summary and remove all text that relates to the identity of the person being expunged, then click the **Update Summary** button. Also review **Narratives** tied to this Incident Report and remove all references to that person.

**NOTE:** Online RMS saves the original and the edited versions of the Narrative.



**Incident Information**

Incident Summary: 07/28/2015 1713 Hrs - 100 Ash Street INDIANAPO... Agency: District 42, Versailles  
Offense(s): 35-42-2-1.5 - BATTERY- AGGRAVATED Report #: 2015ROOT0162 Supp #: 0

**Person Information**

LAST NAME Akbar	FIRST NAME Allah	DOB 04/02/1980 (Age: 38)	SEX Male	RACE Middle Eastern	ETHNICITY Arabic
DRIVER'S LICENSE # 12345678	SSN 311-77-6788	GANGS American Hustle(Active)	EMPLOYER NAME Bank Of America	INDEX ID 540	

**Incident Summary**

PLEASE REVIEW THE INCIDENT SUMMARY FOR ANY REFERENCE TO THIS PERSON.

(Remove text that relates to the identity of the person being expunged.)

Update Summary

Remove identity references from Narratives.

**Incident Narratives**

PLEASE REVIEW THE INCIDENT NARRATIVES FOR ANY REFERENCE TO THIS PERSON.

Title	Created By	Date Of Info	Supp#	Actions
Supplement#1 - Narrative	Simpson, Homer	07/28/2015	1	
Original Narrative	Simpson, Homer	07/28/2015	0	

**EXPUNGEMENT COMMENTS**

Go Back Expunge

Click the **Back** button if you choose to cancel the expungement.

**NOTE:** If you cancel the expungement after updating the **Incident Summary** text, you need to update **Incident Summary** back to its original version manually.

To continue with the expungement, enter **Expungement Comments** at the bottom of the page then click the **Expunge** button.

**EXPUNGEMENT COMMENTS**

Enter your comments here.

Go Back Expunge

The *View Person* page refreshes automatically, returning you to the *Person Details* tab. Click on the *Person Summary* tab to see **[Expunged]** in the **Expunge** column of the Incident.

Involved Incidents		
	Expunge	Report#
<input type="checkbox"/>		2018D4210186
<input type="checkbox"/>		2017-0120
<input type="checkbox"/>		2017-0091
<input type="checkbox"/>		2016-BCSO-000177
<input type="checkbox"/>		2016D4210025
<input type="checkbox"/>		2015ROOT0220
<input type="checkbox"/>	[EXPUNGED] 	2015ROOT0162
		2015ROOT0156

Users without the *Expungement - View Expunged Records* permission do not see the Incident Involvement, and the Involvement counts do not include the Incident from which the person was expunged. For more information refer to "Expungement Results" below.

Expunged records are not visible in Online RMS without the *Expungement - View Expunged Records* permission. Refer to your system administrator for more information on permissions.

## Expungement Results


Online RMS protects the identity and related data of expunged offenders or arrestees by applying restrictions based on a combination of user permissions and an Expunged flag placed on the data.

## Offender or Arrestee Name Restrictions

The offender or arrestee's name is replaced with the word **EXPUNGED** for users *without* the *Expungement - View Expunged Records* permission.

The offender or arrestee's name displays with an **[EXPUNGED]** tag for users *with* the *Expungement - View Expunged* permission.

- Incident Summary Tab – Offenders Grid.
- Incident Names Tab – Offenders Grid (no view icon).
- Incident Names Tab – View Victim page – Victim/Offender relationship.
- Incident Property/Vehicle Tab – View Property page – Property Owner.
- Incident Property/Vehicle Tab – View Vehicle page – Vehicle Owner.
- Visualization – Incident Quick View – Offender Grid.
- Incident Mapping – Incident Quick View – Offender Grid.
- Case Management – Involved Names Grid.
- Evidence Labels – Property Owner.
- Evidence Lab Report – Suspect/Offender box.

Summary		Header		Offenses		Names		Property & Vehicles	
Incident Summary: 07/28/2015 1713 Hrs - 100 Ash Street INDIANAPOLIS, I									
Offense(s): 35-42-2-1.5 - BATTERY- AGGRAVATED									
<b>Offenders</b>					Example for user with View Expunged Records permissions				
Name									Age (Yrs)
 Akbar, Allah <span style="color: blue;">Race: Middle Eastern</span> <span style="color: blue;">Sex: M</span> <span style="color: blue;">DOB: 04/02/1980</span>									35 Years
<b>[EXPUNGED]</b>									

## Other Expunged Data Restrictions


The following changes are applicable throughout Online RMS for users *without* the *Expungement - View Expunged* permission.

- Master Indices – Person Common Event Associations (offender is not displayed at all).
- Visualization – Offender or Arrestee to Incident link.
- Visualization – Person Quick View – Person Summary tab (Incident not displayed for offender).
- Photo Lineup – Person Quick View – Person Summary (Incident not displayed for offender).
- Person Collapse – Person Quick View – Person Summary tab (Incident not displayed for offender).
- Incident Narratives – If updated during the expunge process, only the edited expunged version can be viewed.
- Incident Search – Name / Combo additional search criteria (Incident not returned when searching by offender).
- Incident Smart Search – by name (Incident not returned at all).
- Incident Smart Search – by any other part of incident (offender not displayed / image not displayed).
- Case Search – Name additional search criteria (Incident not returned when searching by offender).

Online RMS displays the above data with an **[EXPUNGED]** tag on the record for users with the *Expungement - View Expunged* permission. Users with this permission can also view both the original Incident Narratives and the edited expunged versions.











**NOTE:** Regardless of the user's permissions, the Print Incident page does not display the expunged offender or arrestee's name, and Quick Print will not print the expunged offender or arrestee.

## Expunge Field Arrest

If you have the *Expunge Records* permission, locate the Involved Field Arrest on the Person Summary tab of the *View Person* page that you want to **Expunge**, then click on the red Expunge icon  in the **Expunge** column to open the *Expunge Arrest* page.

**NOTE:** For details on how to access the *View Person* page refer to "Accessing the View Person Page" on page 678.

**Involved Field Arrests**

Expunge	Arrest Number	Role(s)	Arrest Date	Agency	Charges	Incidents	Actions
	1507452	Arrestee	07/22/2015 0023	District 42, Versailles	35-43-4-2 T12 - THEFT- BUILDING MATERIAL	2015ROOT0154, 2015ROOT0156	
	1504424	Arrestee	04/03/2015 1134	District 42, Versailles			
	1503405	Arrestee	03/18/2015 1134	District 42, Versailles			
	1502371	Arrestee	02/20/2015 0023	District 42, Versailles			
	1410278	Arrestee	10/01/2014 0023	District 42, Versailles			

Review any **Narratives** tied to this Field Arrest and remove all references to that person.

**NOTE:** Online RMS saves the original and the edited versions of the Narrative.

[Go Back](#)

**Arrest Information**

**Arrest Summary:** 07/22/2015 0023 Hrs ⓘ **Agency:** District 42, Versailles

**Charges:** THEFT- BUILDING MATERIAL **Arrest #:** 1507452

**Person Information**

<b>LAST NAME</b> Akbar	<b>FIRST NAME</b> Allah	<b>DOB</b> 04/02/1980 (Age: 38)	<b>SEX</b> Male	<b>RACE</b> Middle Eastern	<b>ETHNICITY</b> Arabic
<b>DRIVER'S LICENSE #</b> 12345678	<b>SSN</b> 311-77-6788	<b>GANGS</b> American Hustle(Active)		<b>EMPLOYER NAME</b> Bank Of America	<b>INDEX ID</b> 540

**Narratives**

Please review the arrest narratives for any reference to this person.

Title	Creator Name	Date Created	Actions
No Data To Display			

**EXPUNGEMENT COMMENTS**











Enter your comments here.

[Go Back](#) [Expunge](#)

Click the **Back** button if you choose to cancel the expungement.

To continue with the expungement, enter **Expungement Comments** then click the **Expunge** button.

The *View Person* page refreshes automatically, returning you to the *Person Details* tab. Click on the *Person Summary* tab to see the **[Expunged]** tag in the **Expunge** column of the Involved Field Arrest.

Involved Field Arrests							
Expunge	Arrest Number	Role(s)	Arrest Date	Agency	Charges	Incidents	Actions
[EXPUNGED] 	1507452	Arrestee	07/22/2015 0023	District 42, Versailles	35-43-4-2 T12 - THEFT- BUILDING MATERIAL	2015ROOT0154, 2015ROOT0156	
	1504424	Arrestee	04/03/2015 1134	District 42, Versailles			
	1503405	Arrestee	03/18/2015 1134	District 42, Versailles			
	1502371	Arrestee	02/20/2015 0023	District 42, Versailles			
	1410278	Arrestee	10/01/2014 0023	District 42, Versailles			

Users *without* the *Expungement - View Expunged Records* permission do not see the Arrest Involvement or the Involvement counts for the expunged Field Arrest. Refer to your system administrator for more information on permissions.

Users *with* the *Expungement - View Expunged Records* permission the Involvement counts remain unchanged, the Field Arrest displays with an **[Expunged]** tag, common events to people, organizations, addresses, vehicles and property display, and an Un-Expunged icon appears to reverse the expungement.

**NOTE:** For more information on reversing an expungement refer to "Un-Expunge" on the facing page.

## Expungement Results

Online RMS protects the identity and related data of expunged records by applying restrictions based on a combination of user permissions and an Expunged flag placed on the data.

For users *without* the *Expungement - View Expunged Records* permission, the Field Arrest will *not* display as follows:


- Field Arrest Search Results (search by number, Arrestee, Names).
- Incident Summary Tab – Arrest Grid (if associated).
- Warrants – Arrest Grid (if associated).
- Incident Names Tab – View Victim Page– Victim/Offender relationship.
- Master Indices – Common Event Associations/Involvement Counts.
- Incident Mapping – Incident Quick View.

- Visualization – Incident Quick View.

Online RMS displays the above data with an **[EXPUNGED]** tag on the record for users with the *Expungement - View Expunged* permission. Users with this permission can also view both the original Incident Narratives and the edited expunged versions.







## Un-Expunge

Only users with the *Expungement - View Expunged Records* permissions can **Un-Expunge** an offender or arrestee on an Incident, or **Un-Expunge** a Field Arrest.

Click the red Expunge icon  in the *Expunge* column for the Incident or Field Arrest on the Person Summary tab of the View Person page.

**NOTE:** For details on how to access the *View Person* page refer to "Accessing the View Person Page" on page 678.

### Involved Field Arrests

Expunge	Arrest Number
<b>[EXPUNGED]</b>  	1507452
	1504424
	1503405
	1502371
	1410278

A confirmation message appears asking if you are sure. Click **Yes** to continue or click **No** to close the message without expunging.

Message From RMS
This will un-expunge the arrest record. Are you sure?
<input type="button" value="No"/> <input type="button" value="Yes"/>

If you chose to expunge, the Field Arrest becomes viewable to all users of the system, and the system discards both the edited expunge Narrative and Incident Summary.



# Chapter 34. Training Videos

## Training Videos Overview

Beginning with Online RMS 11.4.0, agencies can enhance users' training and learning experience with the **Online Training** feature. The **Online Training** feature offers standard Caliber video-based learning to all users and optionally, agency-specific videos. Videos can also be configured to pop-up on a certain page when a feature is enabled.

### Benefits of Video-Based Learning

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

**Note:** For more information on the **Training Video Library**, refer to “Training Videos Library” on page 690.

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

### Video Rules and Requirements

- Agency must have the **Online Training** feature turned on and configured to get the pop-up (required) videos. Contact Caliber Public Safety to turn on and configure this feature.
- Agency must enable this feature on the agency profile for users to have access to non-standard videos.

- No roles or permissions are associated with this feature; the **Online Training** feature controls access.
- Supports only MP4 files at this time.
- Contact Caliber Public Safety to upload videos.
- The agency administrator has the option to require user acknowledgment after viewing the video.
- The **date and time** watched by users are saved to the database on videos that **require acknowledgment**.

## Acknowledgment Required vs. Optional

The agency administrator has the option to **require your acknowledgment** after viewing videos. By acknowledging a video, you are stating that you have watched the video in its entirety. The video pops-up automatically each time you log into Online RMS and access a page to which the video is associated until you acknowledge having watched it.

Unlike videos that require acknowledgment, **optional** videos do not pop-up automatically when you log into Online RMS.

All videos are stored in your **Training Videos Library**. You can watch videos whenever you wish by navigating to your **Training Videos Library**.

For more information on **watching** and **acknowledging** videos, refer to “Watch Training Videos” on page 695.

For more information on **Training Videos Library**, refer to “Training Videos Library” on page 690.

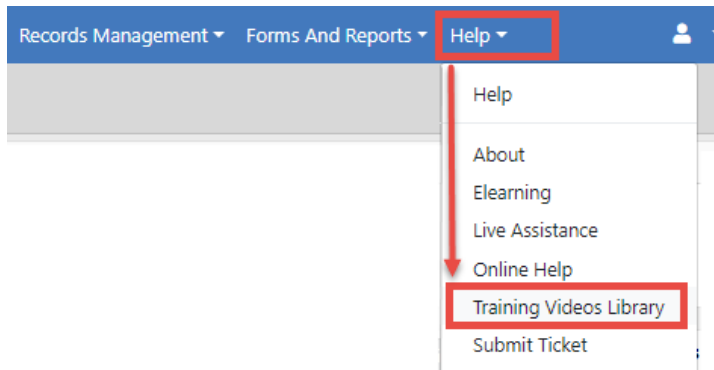
## Training Videos Library

Training videos reside in your personal Online RMS **Training Videos Library**, where you can keep track of the videos you have and haven't watched, and you can watch these videos as often and as many times as you wish.

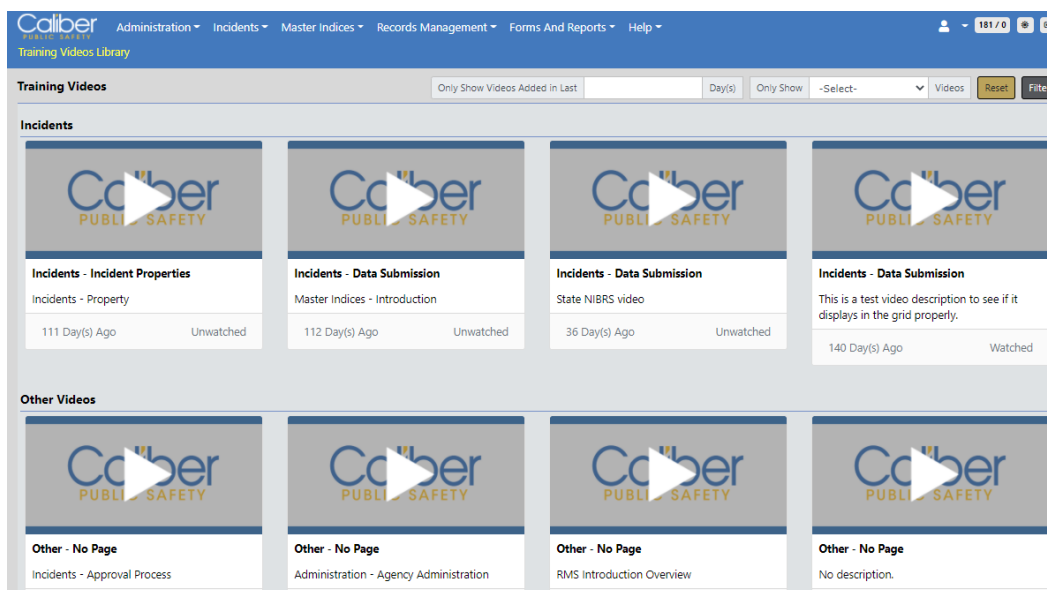
## Access the Training Videos Library

Follow these steps to access your **Training Videos Library** in Online RMS:

1. Click **Help** on the top navigation menu, then click **Training Videos Library**.



2. The **Training Videos Library** Opens.



## Understanding the Training Videos Library

### ***Videos can be divided into groups***

Group examples:

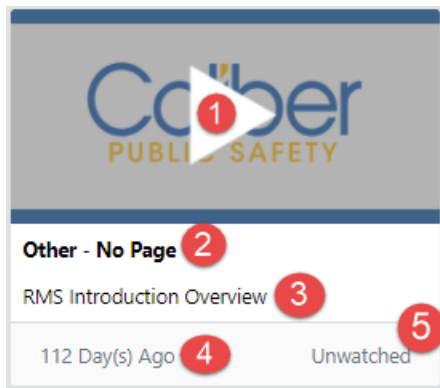
- Incidents
  - This group contains incident-based reporting videos.
- Other Videos
  - This group contains videos that do not fall into the other groups.

Grouping happens when the pop-up option is turned on and the agency administrator configures specific videos to pop-up on a specific page.

For example, if the agency administrator turns the feature on and they configure the Incident Category video to pop-up on the Incidents page, the Incident Category page displays under the Incidents category.

This the pop-up feature is not turned on, all videos appear under the Other Videos category.

### Video Elements



1. Click to **Play**.
2. The **Group** to which the video belongs (i.e., Incidents or Other Videos).
3. **Description** of the video.
4. The **number of days** the video has been in your Training Video Library.
5. **Status** of the video (i.e., Watched or Unwatched).

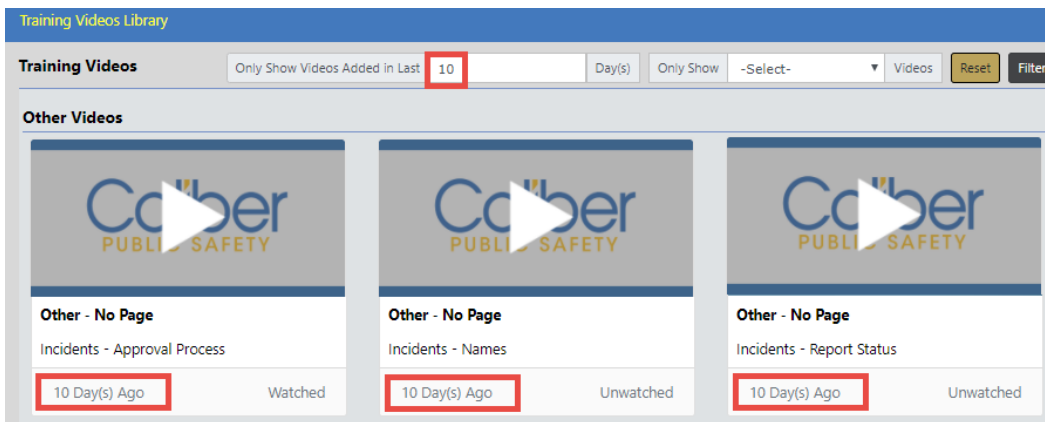
### Filter Video List

Across the top of the **Training Video Library**, you have the option to filter the video list by only showing videos that have been added within a *specified number of days*, and only show *watched* or *unwatched* videos.

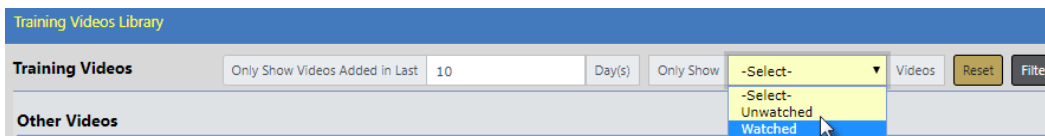
#### Show Videos Added in Last Number of Day(s)



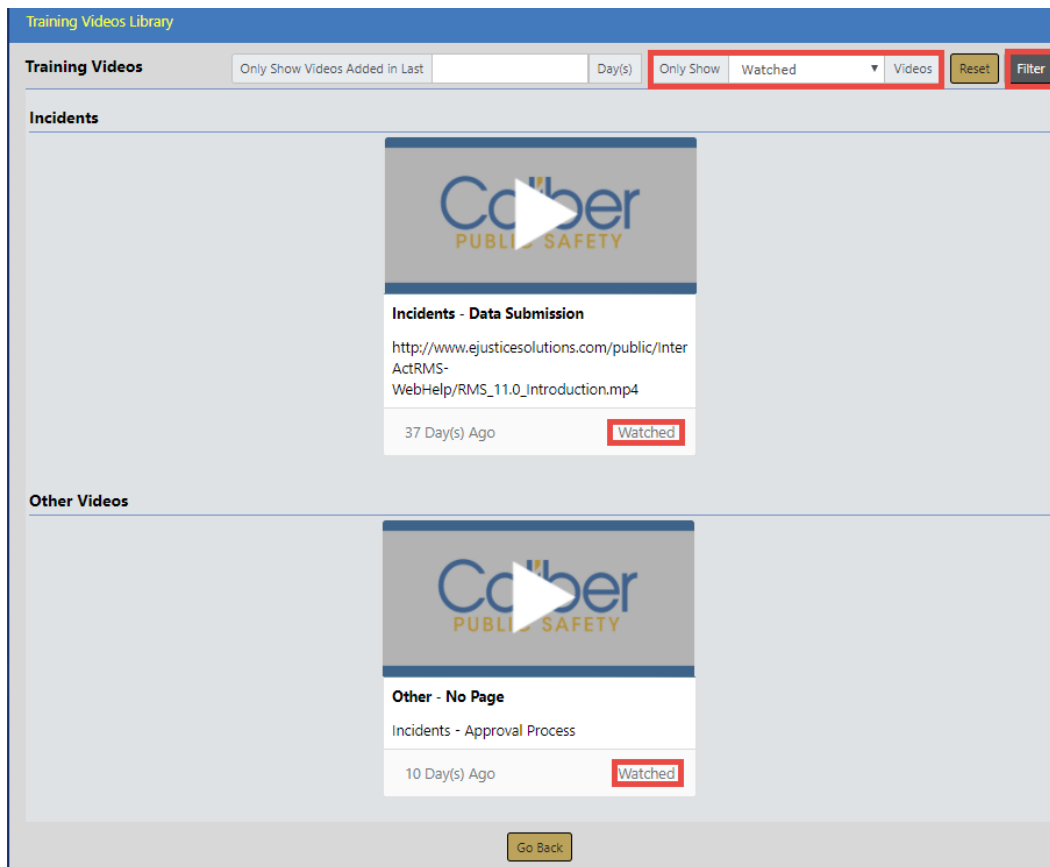
1. Enter the **number of days** in the field provided.
2. Click **Filter** to display only the videos that were posted to your **Training Video Library** within the days specified.



#### Show Watched or Unwatched Videos

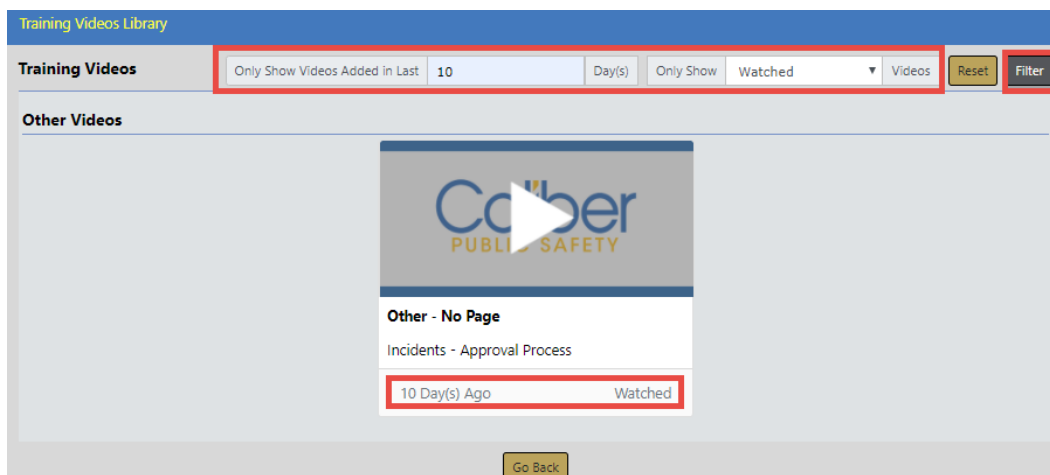


1. Click into the **Only Show** field and select **Watched** or **Unwatched** from the list. **Watched** is used in the example.
2. Click **Filter** to display only the videos that match your criteria.



### Show Videos with Combined Criteria

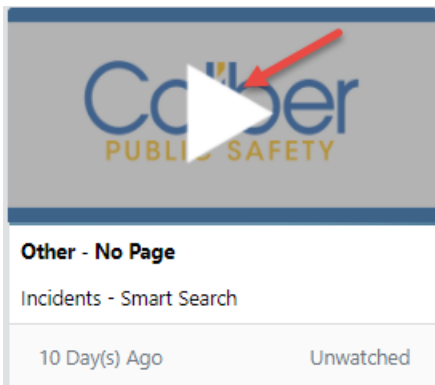
1. Enter the **number of days** in the field provided.
2. Click into the **Only Show** field and select **Watched** or **Unwatched** from the list. **Watched** is used in the example.
3. Click **Filter** to display only the videos that match your combined criteria.



## Watch Training Videos

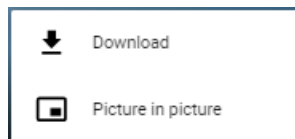
Follow these steps to watch training videos in Online RMS:

1. Identify the training video you wish to watch. There are two ways to do this:
  - a. When a video *requires your acknowledgment*, the video pops-up automatically each time you log into Online RMS and access a page to which the video is associated until you acknowledge having watched it..
  - b. Or, you can go to your **Training Videos Library** for a list of videos available to you. For details on accessing videos in your **Training Videos Library**, refer to “Training Videos Library” on page 690.
2. Click the **Play** button to launch the video with additional options.





1. The **Group** to which the video resides in your Training Video Library.
2. Hover mouse over, or click on, the **information bubble** to view the Description of the video.
3. Click on **Open in New Window** to open the video in a new window, separate from Online RMS.
4. Click to **Play** the video.
5. The length of time left and total video time, respectively.
6. Click to manage the **audio**.
7. Click to watch the video in **Full Screen** mode.
8. Click to **Download** the video or view it **Picture in Picture**.



9. Click **acknowledge** after watching the video in its entirety.

**Note:** This option only appears when an acknowledgment is required. For more information, refer to your agency administrator.



**Note:** The video pops-up automatically every time you log into Online RMS until you acknowledge having watched it.

10. Click to **Close** the window.

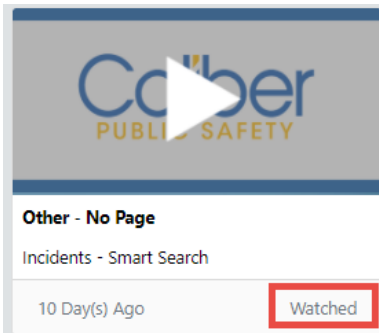
**Note:** This option is grayed-out if the an acknowledgment is required, and the acknowledgment checkbox has not been checked.

11. Click **Watch Later** if you wish to close and return to the video later.

**Note:** This option appears only if the an acknowledgment is required, and it grays-out when the acknowledgment box is checked.

**Note:** If you do not acknowledge having watched the video, the video pops-up automatically each time you log into Online RMS and access a page to which the video is associated.

3. After the video plays and the window is closed, the video status changes from **Unwatched** to **Watched**.





# Chapter 35. Training Module

## Overview

The Online RMS **Training** module provides users with proper permissions the ability to create **Training Courses** and **Certifications** with date ranges and required prerequisites, then easily track employee involvement to ensure they each obtain and maintain the necessary training and certification based on their job duties.

This module is available with full subscription access to Online RMS. It is disabled by default but can be enabled, and additional user training is available for purchase. Contact Caliber Public Safety Support for more information.

The **Training** module can be configured specific to your agency's needs, such as an eligible list of course types (i.e. gun safety, mobile training, etc.) and classification levels. Refer to the Online RMS Administrator Guide for details on configuring these items.

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

- *Courses*

Training classes with specific focus to refine skills (i.e., Online RMS training).

Attendees can be assigned to Courses two different ways:

- a. From the Course Instance record.
- b. From the Employee record.

- *Certifications*

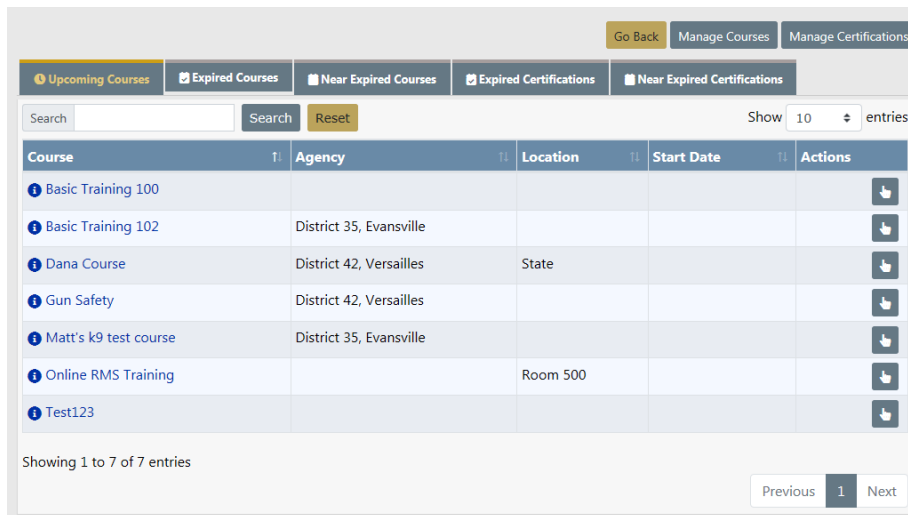
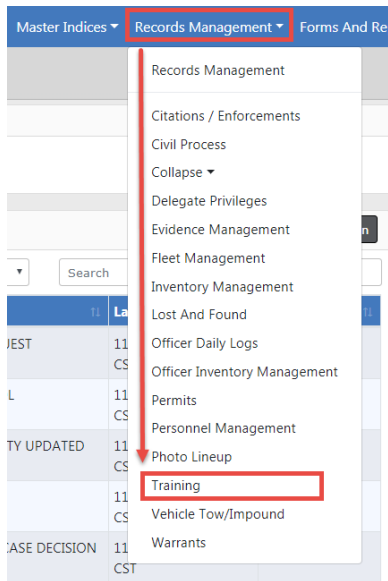
Proof of achieving specific skills or knowledge level that are mandatory for specific job duties (i.e., gun safety certification).

Attendees can be assigned to Certifications one way:

- a. From the Employee record.

## Training Module Dashboard

Click the **Records Management** menu on the *Top Navigation Bar*, then click on the **Training** option to access a consolidated pathway for viewing and managing training data from a single screen.



**NOTE:** The **Training Dashboard** contents are based on permissions and can vary by user. For more information on permissions, refer to your system administrator.

The **Training Dashboard** consists of several features:

1. There are five tabs that contain various course and certification information. Each tab contains links that allow you to view or edit information, depending on your permissions set by the agency administrator. Available links vary by tab as outlined below.

### **Upcoming Courses**

- A current list of active courses.
- View or edit upcoming courses.

### **Expired Courses**

- A list of closed or inactive courses.
- View or edit employee records that are tied to an expired course.
- View or edit an expired course.

### **Near Expired Courses**

- A list of courses that are scheduled to close in the near future making them unavailable.
- View or edit employee records that are tied to courses nearing expiration.
- View or edit courses nearing expiration.

### **Expired Certifications**

- A list of expired certifications by employee.
- View or edit employee records that are tied to expired certifications.
- View or edit expired certifications

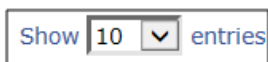
### **Near Expired Certifications**

- A list of certifications about to expire by employee.
- View or edit employee records that are tied to certifications nearing expiration.
- View or edit certifications nearing expiration.

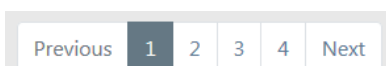
2. Three buttons on the top right of the window:

- Click the **Manage Courses** button to add or update courses. For more information refer to "Manage Courses" on page 705.
- Click the **Manage Certifications** button to add or update certifications.

- Click the **Go Back** button to exit the dashboard.
- 3. You can change the number of entries that appear in the grid. Click on the **Show Entries**  and select 10, 25, 50 or 100. The default is 10.

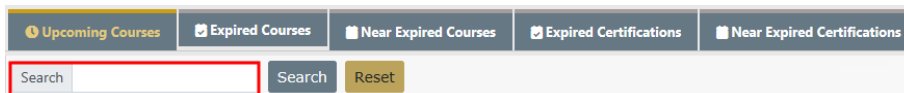


- 4. The bottom of the window displays the number of entries and it allows you to navigate between pages.



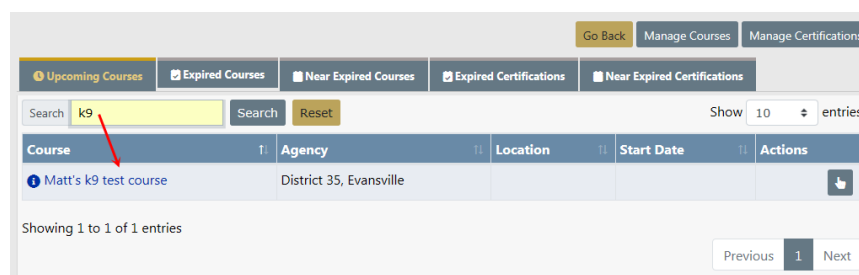
This example shows 10 entries per page. The highlighted number on the right is the page currently being viewed. Click **Next** to advance to the next page, or click the page number you want to view. Click on **Previous** to view the previous page.

- 5. Each tab allows you to **Search** or filter data that appears in the grid.



- a. Click on the tab you want to view, if different than the default **Upcoming Courses**.
- b. Enter text into the **Search** text box, then click the **Search** button or press **Enter** to display only records matching the entered text. The displayed list dynamically changes based on the entered text.

For example, on the **Upcoming Courses** tab enter *k9* in the text box, then click **Search** or press **Enter** to show only records containing *k9*.





**NOTE:** Click the **Reset** button to remove the entered search text and list all available records.

- 6. Example of accessing information within a tab. The same general process applies to all tabs.

### View Details Two Ways

- a. Click on a **Course** to view details about that particular course. This is view only, details cannot be changed here.

Course	Agency	Location	Start Date	Actions
 Matt's k9 test course	District 35, Evansville			

Training Dashboard / View Course Go Back

COURSE ID	NAME		AGENCY	
8	Matt's k9 test course		District 35, Evansville	
COURSE TYPE	COURSE CLASSIFICATION		EXTERNAL	
Basic Training	Classification 1		No	
START DATE	TIME	END DATE		TIME
EXPIRATION DAYS	MINIMUM HOURS		PASSING SCORE	
0	0		5	
MAX ATTENDEES	MINIMUM ATTENDEES		TRAINING COST	
0	0		\$0	
INSTRUCTOR				
LOCATION				
DESCRIPTION				
EQUIPMENT				
COMMENTS				


- b. Click on the information bubble to view the details without having to open the record itself.



Course Details		
<b>COURSE ID:</b> 8	<b>NAME:</b> Matt's k9 test course	<b>AGENCY:</b> District 35, Evansville
<b>COURSE TEMPLATE ID:</b> 3	<b>TEMPLATE NAME:</b> K-9 Training 101	
<b>COURSE TYPE:</b> Basic Training	<b>COURSE CLASSIFICATION:</b> Classification 1	
<b>START DATE:</b>	<b>END DATE:</b>	<b>TRAINING COST:</b> \$0
<b>EXPIRATION DAYS:</b> 0	<b>MINIMUM HOURS:</b> 0	<b>PASSING SCORE:</b> 5
<b>MAX ATTENDEES:</b> 0	<b>MINIMUM ATTENDEES:</b> 0	<b>CURRENT ATTENDEES:</b> 0
<b>INSTRUCTOR:</b>		
<b>LOCATION:</b>		
<b>EXTERNAL:</b> No		
<b>DESCRIPTION:</b>		
<b>EQUIPMENT:</b>		
<b>COMMENTS:</b>		
<a href="#">Close</a>		

Click on the **Close** button to close the window and return to the **Training** dashboard.

### Edit the Details

- Or click on the **Select** icon  under the *Actions* column to edit the details of a particular course.
- Click on the **Back** button to return to the **Dashboard**. For your convenience, this button is located on the upper right of the window and on the lower center of the window; either will return you to the **Dashboard**.

### Exit Training Module

- Click the **Go Back** button to return to the Records Management main menu.

## Courses

There are two components to **Courses**:

- Template
- Course Instance



## Template

A **Template** is a standard form that is used as a starting point when creating **Course Instances**. For example, users with proper permissions can create a **Template** that is pre-populated with a standard class description that will pull into the newly created **Course Instance** automatically.

**NOTE:** For more information on permissions and managing **Training Templates** refer to the *Online RMS Admin Guide*..

## Course Instance

A **Course Instance** is a specific course to which employees can be assigned. There could be multiple records of the same course, but with different dates or other information. When creating a **Course Instance**, with proper permissions, you can either choose an existing **Template** from a list or create a new **Template** and **Course Instance** at the same time without moving between menus to do both.

**NOTE:** The phrase **Course Instance** is often referred to as **Course** throughout this guide.

## Manage Courses

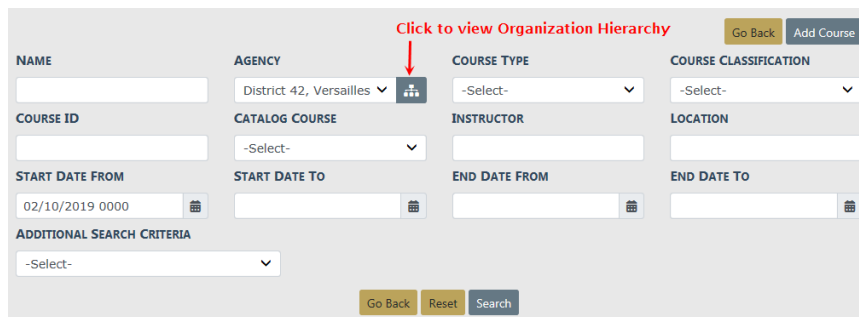
The **Manage Courses** button on the **Training** dashboard allows you to, with proper permissions, *Search*, *Add*, and *Edit Course Instance* data.

To update course data you must first search for the course. The search results will provide the option to update or view the course data.

**NOTE:** Once a Course Instance is created, you cannot delete it. Enter the appropriate **End Date** if created in error or if you need to end a particular Course Instance for whatever reason.

### Search Courses

1. Click on the **Manage Courses** button on the **Training Dashboard**. For details on accessing the dashboard refer to "Training Module Dashboard" on page 700.
2. The **Course Search** screen appears.
3. With proper permissions you can select an **Agency** within the organization by using two methods.
  - a. Click in the Agency field then select from the list that appears.



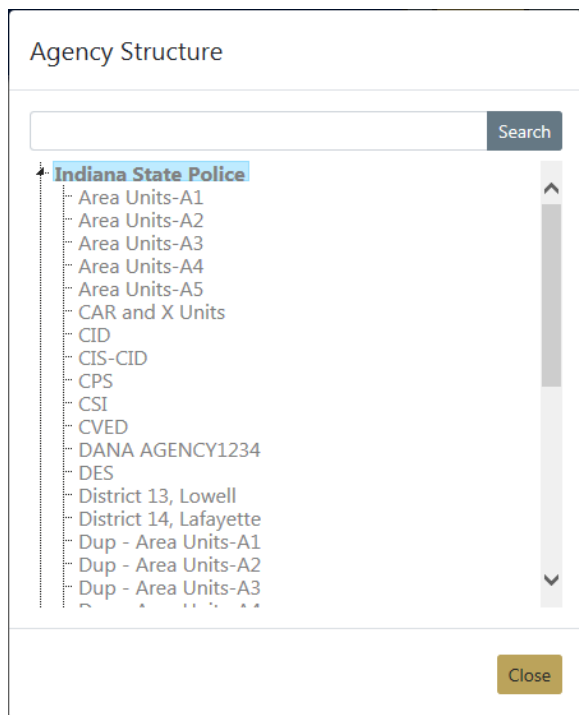
The screenshot shows a search form with the following fields: NAME, COURSE ID, START DATE FROM, ADDITIONAL SEARCH CRITERIA, AGENCY (set to 'District 42, Versailles'), CATALOG COURSE, START DATE TO, COURSE TYPE, INSTRUCTOR, END DATE FROM, and COURSE CLASSIFICATION. A red arrow points to a small icon next to the Agency field. Above the form, there is a link that says 'Click to view Organization Hierarchy' and buttons for 'Go Back' and 'Add Course'. Below the form are buttons for 'Go Back', 'Reset', and 'Search'.

- b. Click on the hierarchy icon next to the **Agency** field to display the organization hierarchy.



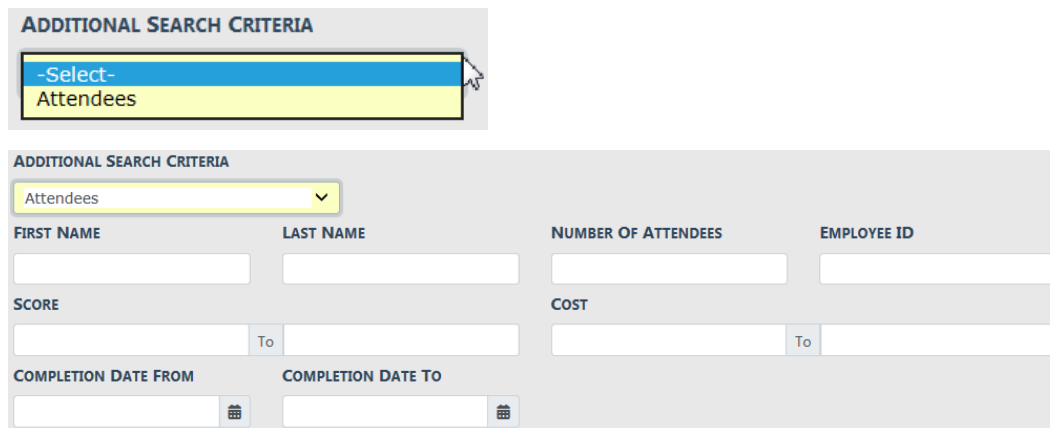
The 'Agency Structure' dialog box features a search bar at the top with a 'Search' button. Below the search bar, a list of units is displayed, including 'Indiana State Police' and 'JEFF PD'. A vertical scrollbar is on the right side of the list. A 'Close' button is located at the bottom right of the dialog box.

Hover over the agency to display a list of the agency's units.



Click on the agency you want to include in the search and the agency name appears in the **Agency** field.




- 4. The fields with **-Select-** supply a specific list from which to choose. For example, to search for a specific **Course Type** click in the field and a list will appear, then click on an item from the list.
- 5. Optionally reduce your search results to include only **Additional Search Criteria** by using the drop-down list at the bottom left of the screen., then enter the appropriate information in the additional fields that appear on the screen.




- 6. Either click **Reset** to clear all fields to start over, click **Go Back** to return to the Training dashboard, click **Search** to display a list of existing courses that match the

entered data, or **Add Course** to add a course to the database without first searching. For details on how to add a course refer to "Add Course " below.

If you selected **Search** the results display in a grid.

Course	First Name	Last Name	Score	Completion Date	# Attendees	Start Date	End Date	Agency	Actions
ATTENDEES	George	Henderson	90		2	07/01/2018 09:00	07/01/2018 13:00	District 42, Versailles	
ATTENDEES	One	User	100	06/01/2018	2	07/01/2018 09:00	07/01/2018 13:00	District 42, Versailles	
Agency Startup	PAUL	TOBIN			2	10/04/2018 23:00	10/04/2018 23:00	District 21, Toll Road - SC	

Click **Refine Search** to modify your current search criteria, or **New Search** to start the search over. Click on the course name to view course details, or click the Edit icon  in the *Actions* column to edit the course. For details on editing the course refer to "Edit Course " on page 711.

7. To export search results to a file refer to "Export Search Results" on page 31.

## Add Course

Add courses by way of the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 700.

1. Click on the **Manage Courses** button on the **Training** dashboard.
2. The **Course Search** screen appears. Before adding the course, it is recommended you first search for the course to verify whether or not it already exists, though not required. For instructions on how to search for courses refer to "Search Courses " on page 706.
3. Click on the **Add Course** button on the **Course Search** window to open the *Add Course* screen.

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

- Select a course template from the **Catalog Course** list.

If you do not see an option on the list that fits the course you are adding, you can select the **-New Course-** option, located at the top of the list, and the system creates a Course Template automatically based on the data you enter on the *Add Course* form. Once you save the record, it will then appear in the **Catalog Course** list and is available to other users who also have the permissions to manage courses.

4. Once you choose a **Catalog Course**, other fields on the form become available to accept data. Enter the appropriate data in the fields provided.
5. Click **Save** to create the Course record, or click **Go Back** to return to the **Course Search** screen without creating the record.






When you select **Save**, the **Edit Course** screen displays.

The screenshot shows the 'Edit Course' form with the following fields and sections:

- Go Back** button (top right)
- COURSE ID**: 69
- NAME**: Advanced K-9 Training 201
- AGENCY**: Area Units-A1
- COURSE TYPE**: Advanced Training
- COURSE CLASSIFICATION**: Classification 1
- EXTERNAL**:
- START DATE**: [Calendar icon]
- TIME**: [Time input]
- END DATE**: [Calendar icon]
- TIME**: [Time input]
- EXPIRATION DAYS**: 0
- MINIMUM HOURS**: 0
- PASSING SCORE**: 0
- MAX ATTENDEES**: 0
- MINIMUM ATTENDEES**: 0
- TRAINING COST**: \$0.00
- INSTRUCTOR**: [Text input]
- LOCATION**: [Text input]
- DESCRIPTION**: [Text input]
- EQUIPMENT**: [Text input]
- COMMENTS**: [Text input]
- Go Back** and **Update** buttons
- Attendees** section with **+ Add Attendee** button
- Groups** section with **+ Restrict to Group** button

Prerequisites	
Course	Description
K-9 Training 101	

Attachments				
Keyword	File Name	Description	Date of Info	Actions
 IMG	K-9 Handler Safety		04/30/2018	
PDF	K-9 Officer Comfort		04/30/2018	


Additional information can be added such as, **Attendees** and **Groups**. For detailed instructions refer to "Edit Course " below.

All **Attachments** and **Prerequisites** reside on the Class Template or Catalog Course that you chose for the class record; if they do not exist on the course template, then they do not appear on your course record. Adding attachments and prerequisites to class templates is an admin function.

**NOTE:** If you need to add attachments or prerequisites to a course, refer to the Online RMS Admin Guide for instructions or see your administrator.

## Edit Course

To edit a course you must first **Search** for the course. The **Search Results** provides the option to edit the course data.

1. Click on the **Manage Courses** button on the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 700
2. The **Course Search** screen appears. Search for the course you want to update. For instructions on how to search for courses refer to "Search Courses " on page 706.
3. In the Course Search Results, click on the **Edit** icon  that appears in the **Actions** column of the course record you want to update. The **Edit Course** form opens.

[Go Back](#)

<b>COURSE ID</b> <input type="text" value="4"/>	<b>NAME</b> <input type="text" value="Firearms Training"/>	<b>AGENCY</b> <input type="text" value="Indiana State Police"/>
<b>COURSE TYPE</b> <input type="text" value="Intermediate Training"/>	<b>COURSE CLASSIFICATION</b> <input type="text" value="Classification 2"/>	<b>EXTERNAL</b> <input type="checkbox"/>
<b>START DATE</b> <input type="text" value="06/01/2018"/>	<b>TIME</b> <input type="text" value="0900"/>	<b>END DATE</b> <input type="text" value="06/01/2018"/>
<b>EXPIRATION DAYS</b> <input type="text" value="30"/>	<b>MINIMUM HOURS</b> <input type="text" value="10"/>	<b>PASSING SCORE</b> <input type="text" value="85"/>
<b>MAX ATTENDEES</b> <input type="text" value="14"/>	<b>MINIMUM ATTENDEES</b> <input type="text" value="4"/>	<b>TRAINING COST</b> <input type="text" value="\$100.15"/>
<b>INSTRUCTOR</b> <input type="text" value="Brad Cooper"/>		
<b>LOCATION</b> <input type="text" value="Firing Range"/>		
<b>DESCRIPTION</b> <input type="text" value="creating with new template"/>		
<b>EQUIPMENT</b> <input type="text" value="firearm"/>		
<b>COMMENTS</b> <input type="text" value="no comments"/>		

[Go Back](#)   [Update](#)

**Attendees** [Add Attendee](#)

Name	Agency	Cost	Score	Pass/Fail	Completed Date	Actions
Dana McMillan	District 34, Jasper					<input type="text" value=""/> <input type="text" value=""/>

- Make the necessary updates to the existing data, then click the **Update** button to apply the changes, or click the **Go Back** button to return to the **Course Search Results** window, if you wish.

**NOTE:** You cannot delete a Course Instance. Enter the appropriate **End Date** if created in error or if you need to end a particular Course Instance for whatever reason.

- You can *Add*, *Edit*, or *Delete* an Attendee.

### Add an Attendee

- Click on the **Add Attendee** link while on the **Edit Course** form to add attendees to the class. The **Employee Search** screen appears.



The form contains the following fields and controls:

- ACTIVE STATUS:** Active (dropdown)
- USER NAME:** Text input
- AGENCY:** All Agencies (dropdown)
- LAST NAME:** Text input
- FIRST NAME:** Text input
- MIDDLE NAME:** Text input
- SUFFIX:** Text input
- MAIDEN NAME:** Text input
- TITLE:** -Select- (dropdown)
- SEX:** -Select- (dropdown)
- RACE:** -Select- (dropdown)
- ETHNICITY:** -Select- (dropdown)
- SSN:** Text input
- DOB:** Date picker
- PLACE OF BIRTH:** Text input
- EMPLOYEE ID:** Text input
- EMPLOYEE TYPE:** -Select- (dropdown)
- EMPLOYEE LEVEL:** -Select- (dropdown)
- HAND DOMINANCE:** -Select- (dropdown)
- BARGAINING UNIT:** Text input
- BLOOD TYPE:** -Select- (dropdown)
- LONGEVITY DATE FROM:** Date picker
- LONGEVITY DATE TO:** Date picker
- IS SYSTEM USER:** YES NO (checkboxes)
- HIRE DATE FROM:** Date picker
- HIRE DATE TO:** Date picker
- END DATE FROM:** Date picker
- END DATE TO:** Date picker
- ADDITIONAL SEARCH CRITERIA:** -Select- (dropdown)

Buttons: Go Back, Reset, Search

b. Enter the search criteria into the fields provided, then click **Search** to display the **Employee Search Results**.

Buttons: Refine Search, New Search, Add Employee

1 result(s) found

Last Name	First Name	Middle Name	Employee ID	Employee Type	User ID	Agency	Actions
LeClaire	Kris	Carol		Non Sworn	CCSAUR1@GMAIL.COM	District 42, Versailles	

Click to view employee data

Buttons: Refine Search, New Search

- c. Optionally click on the person's **Last Name** to view the employee record, or click the **Select** icon under the *Actions* column to select and add the person to the course record.
- d. If the employee has not yet filled a *Prerequisite* that is associated with the course, a message appears indicating the selected employee cannot yet enroll in this course.

Course Details

**Employee must complete and pass all of courses listed in red before enrolling in this course.**

**Course Prerequisites**

Course	Description
<b>Basic Training 100</b>	a

Close

e. If there are no *Prerequisites* to fulfill, the **Add Attendee** form appears.

- f. Enter the appropriate information then click **Save**, or click **Go Back** to return to the **Employee Search Results** screen without adding the attendee. Leave fields blank that do not currently apply.
- g. After clicking **Save**, An *Add Attachment* link appears. Click on the link to attach a photo or document to this attendee record. A prior certification, for example. For instructions on attaching documents refer to "Attachments" on page 59.

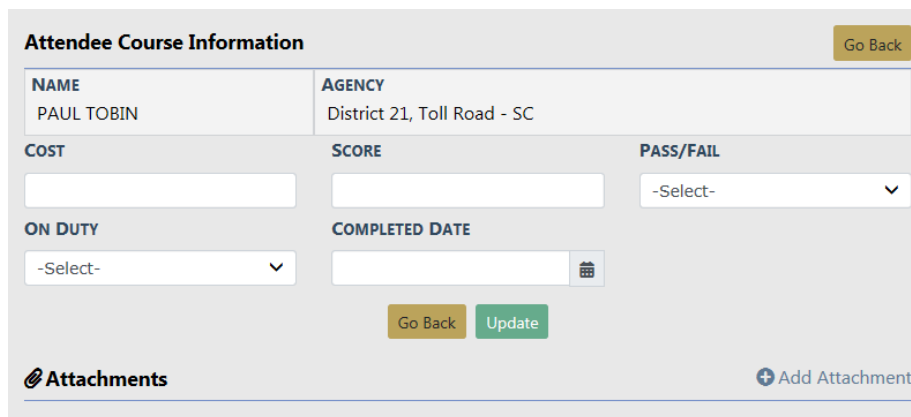
- h. If you made changes or added attachment, click **Update**, then **Go Back** to return to the **Edit Course** form, otherwise click **Go Back**.
- i. Attendees that are successfully enrolled in the course appear in the **Attendees** grid.

Attendees <span style="float: right;">+ Add Attendee</span>						
Name	Agency	Cost	Score	Pass/Fail	Completed Date	Actions
PAUL TOBIN	District 21, Toll Road - SC					

**NOTE:** When enrolling an attendee, the system also add the course to the attendee's Online RMS Employee record automatically. For more information refer to the *Online RMS Administrator Guide* or your system administrator.

**Edit an Attendee**


- a. Click the **Edit** icon on the attendee record you want to update and the **Edit Attendee** form opens.

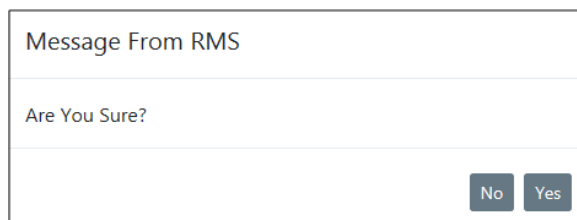


The form is titled "Attendee Course Information" and includes a "Go Back" button in the top right corner. It contains several input fields: "NAME" (PAUL TOBIN), "AGENCY" (District 21, Toll Road - SC), "COST" (empty), "SCORE" (empty), "PASS/FAIL" (dropdown menu with "-Select-" selected), "ON DUTY" (dropdown menu with "-Select-" selected), and "COMPLETED DATE" (calendar icon). At the bottom, there are "Go Back" and "Update" buttons. Below the form is an "Attachments" section with an "Add Attachment" button.

- b. Enter the relevant information then click **Update** to save your changes.
- c. Click **Go Back** to return to the **Edit Course** page.
- d. Make other needed updates if needed, then click **Update**. Click **Go Back** to return to the **Course Search Results** page.

**Delete an Attendee**

- a. Click the **Delete** icon  on the attendee record you want to delete.
- b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Course** window without deleting.

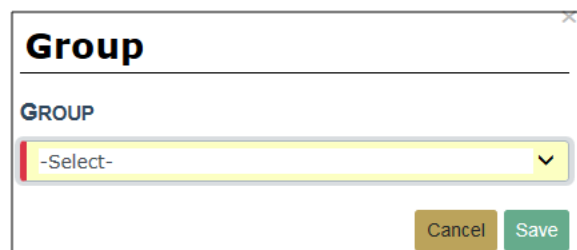


The window is titled "Message From RMS" and contains the text "Are You Sure?". At the bottom right, there are "No" and "Yes" buttons.

6. You can restrict the class to specific groups.

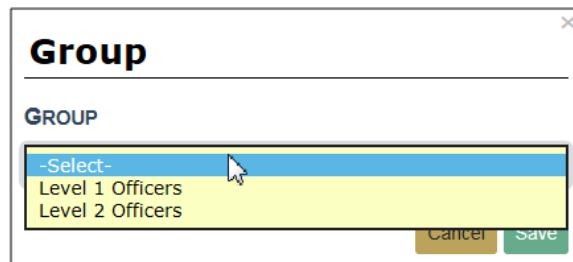
**Add a Group**

- a. Click on the **Restrict to Group** link while on the **Edit Course** form. The **Group** window appears.




The window is titled "Group" and contains a "GROUP" dropdown menu with "-Select-" selected. At the bottom right, there are "Cancel" and "Save" buttons.

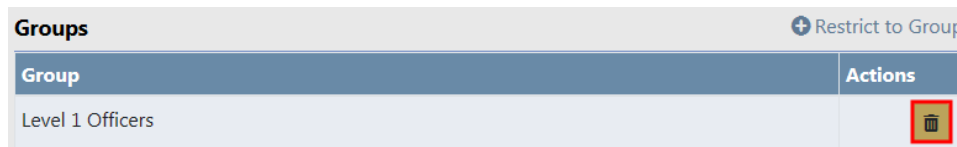
- b. Click on the **Group** field and select a group from the list. This list is configurable and is maintained by your administrator.



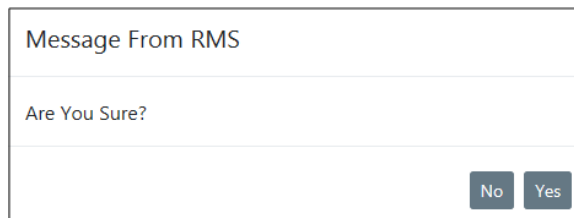
- c. Click **Save** to add the group or **Cancel** to return to the **Edit Course** window without adding the group.

### Delete a Group from the Course

- a. Click the **Delete** icon  on the group record you want to delete from the course.



- b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Course** window without deleting.



**NOTE:** When deleting an enrolled attendee, the system also removes the course from the attendee's Online RMS Employee record automatically. For more information refer to the *Online RMS Administrator Guide* or your system administrator.

7. Click the **Go Back** button to return to the **Course Search Results** screen.

## Manage Certifications

The **Manage Certifications** button on the **Training** dashboard allows you to, with proper permissions, *Search*, *Add*, and *Edit Certification* data.

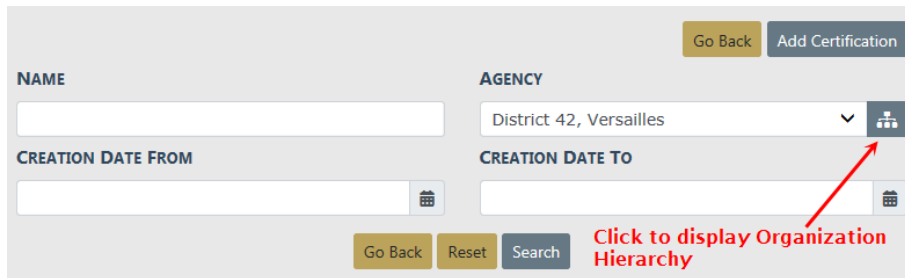
To update certification data you must first search for the certification. The search results will provide the option to update or view the certification data.

**NOTE:** Once a Certification is created, you cannot delete it. Enter the appropriate **Expiration Days** if created in error or if you need to end a particular Certification for whatever reason.

Associating a certification to an employee is an administrator function. Refer to the *Online RMS Administrative Guide* for details or contact your system administrator.

## Search Certifications

1. Click on the **Manage Certifications** button on the **Training Dashboard**. For details on accessing the dashboard refer to "Training Module Dashboard" on page 700.
2. The **Certification Search** screen appears.
3. With proper permissions you can select an **Agency** within the organization by using two methods.
  - a. Click on the Agency field then select from the list that appears.

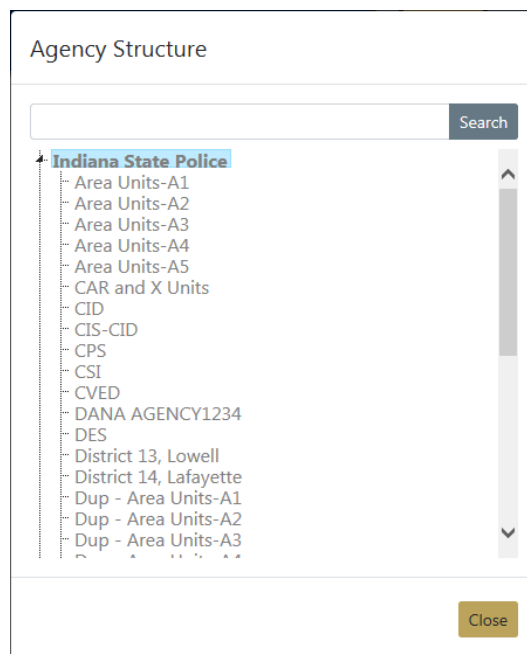


The screenshot shows the Certification Search interface. At the top right are buttons for "Go Back" and "Add Certification". Below are search filters: "NAME" with an empty text box, "AGENCY" with a dropdown menu showing "District 42, Versailles" and a hierarchy icon, "CREATION DATE FROM" with an empty date picker, and "CREATION DATE TO" with an empty date picker. At the bottom are buttons for "Go Back", "Reset", and "Search". A red arrow points to the hierarchy icon in the Agency dropdown, with the text "Click to display Organization Hierarchy" next to it.

- b. Click on the hierarchy icon to display the organization hierarchy.



Hover the mouse over an agency to display a list of the agency's units.

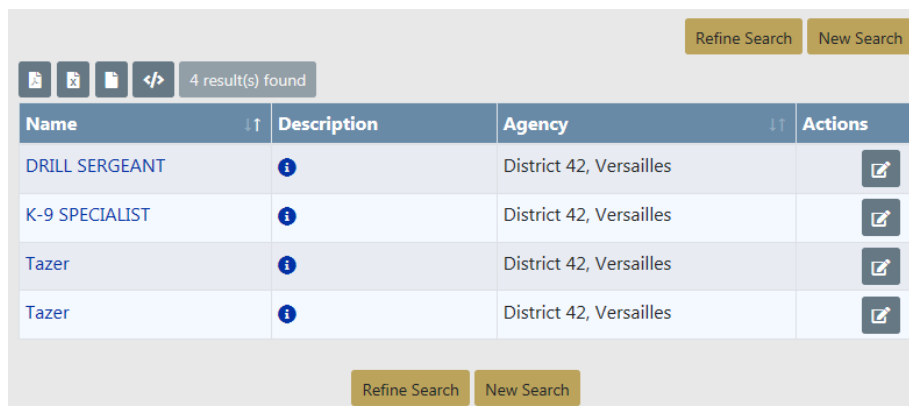


Click on the agency you want to include in the search and the agency name appears in the Agency field.

4. Either click **Reset** to clear all fields to start over, click **Go Back** to return to the Training dashboard, click **Search** to display a list of existing certifications that match the

entered data, or **Add Certification** to add a certification to the database without first searching. For details on how to add a certifications refer to "Add Certification " below.


If you selected **Search** the results display in a grid.



The screenshot shows a search results interface. At the top right, there are two buttons: 'Refine Search' and 'New Search'. Below these is a search bar with '4 result(s) found' and several icons. The main part of the screenshot is a table with the following data:

Name	Description	Agency	Actions
DRILL SERGEANT		District 42, Versailles	
K-9 SPECIALIST		District 42, Versailles	
Tazer		District 42, Versailles	
Tazer		District 42, Versailles	

At the bottom of the table, there are two buttons: 'Refine Search' and 'New Search'.

5. Click on the certification **Name** to view details, or click the **Edit** icon  in the **Actions** column on the right to edit the certification. For details on editing refer to "Edit Certification " on page 721.
6. Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over.
7. To export search results to a file refer to "Export Search Results" on page 31.

## Add Certification

Add certifications by way of the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 700.

1. Click on the **Manage Certifications** button on the **Training** dashboard.
2. The **Certification Search** screen appears. Before adding the certification, it is recommended you first search for the certification to verify whether or not it already exists, though not required. For instructions on how to search for certifications refer to "Search Certifications " on page 717.
3. Click on the **Add Certification** button on the **Certification Search** window to open the *Add Certification* screen.

**NOTE:** Any field with a red left-hand border is a required field. You must complete required fields to continue.

- Enter a **Name** for the certification and other application information.
4. Click **Save** to create the Certification record, or click **Go Back** to return to the **Certification Search** screen without creating the record.

When you select **Save**, the **Edit Certification** screen displays.

Course	Description	Actions
Basic Training 100	a	


Additional information such as Course Prerequities, Certification Prerequisites, and Ranks can be added to the certification. For detailed instructions refer to "Edit Certification " on the facing page.

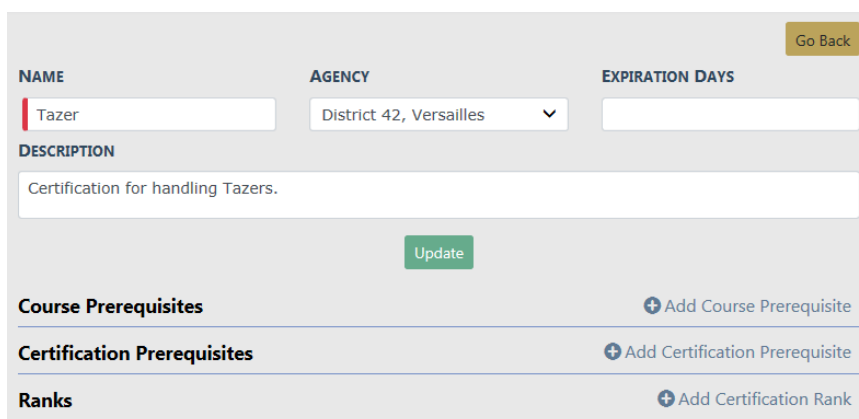
**NOTE:** Once you create a certification, you cannot delete it. Enter the appropriate **Expiration Days** if created in error or if you need to end a particular certification for whatever reason.



## Edit Certification

To edit a certification you must first **Search** for the certification. The **Search Results** provides the option to edit the course data.

1. Click on the **Manage Certifications** button on the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 700
2. The **Certification Search** screen appears. Search for the certification you want to update. For instructions on how to search for certifications refer to "Search Certifications " on page 717.
3. Click on the **Edit** icon  that appears in the *Actions* column of the certification record you want to update. The **Edit Certification** form opens.



The screenshot shows the 'Edit Certification' form. At the top right is a 'Go Back' button. The form has three main input sections: 'NAME' with a text box containing 'Tazer', 'AGENCY' with a dropdown menu showing 'District 42, Versailles', and 'EXPIRATION DAYS' with an empty text box. Below these is a 'DESCRIPTION' section with a text area containing 'Certification for handling Tazers.' and a green 'Update' button. At the bottom, there are three sections: 'Course Prerequisites' with a '+ Add Course Prerequisite' link, 'Certification Prerequisites' with a '+ Add Certification Prerequisite' link, and 'Ranks' with a '+ Add Certification Rank' link.

4. Make the necessary updates to the existing data, then click the **Update** button to apply the changes, or click the **Go Back** button to return to the **Certification Search Results** window, if you wish.

**NOTE:** Once you create a certification, you cannot delete it. Enter the appropriate **Expiration Days** if created in error or if you need to end a particular certification for whatever reason.

5. You can *Add* or *Delete* (remove) a **Course Prerequisite**.

### Add a Course Prerequisite

- a. Click on the **Add Course Prerequisite** link while on the **Edit Certification** form. The **Course Prerequisite** screen appears.
- b. Click into the **Course** field and choose a **Course Prerequisite** from the list that appears. Prerequisites that appear on the list are managed by your administrator. For questions on list content see your administrator.

A dialog box titled "Course Prerequisite" with a close button (X) in the top right corner. It contains a label "COURSE" above a dropdown menu currently showing "-Select-". At the bottom right, there are two buttons: "Cancel" and "Save".

- c. Click **Save** to add the prerequisite to the certification or **Cancel** to return to the **Edit Certification** screen without adding the prerequisite.

The "Edit Certification" form includes fields for NAME (Tazer), AGENCY (District 42, Versailles), and EXPIRATION DAYS. Below these is a DESCRIPTION field containing "Certification on the use of tazers." and an "Update" button. A section titled "Course Prerequisites" contains a table with a red border. The table has columns for Course, Description, and Actions. One row shows "Basic Training 100" with description "a" and a delete icon. Below the table are sections for "Certification Prerequisites" and "Ranks", each with an "Add" link.

Course	Description	Actions
Basic Training 100	a	

**Delete Prerequisite from a Certification**

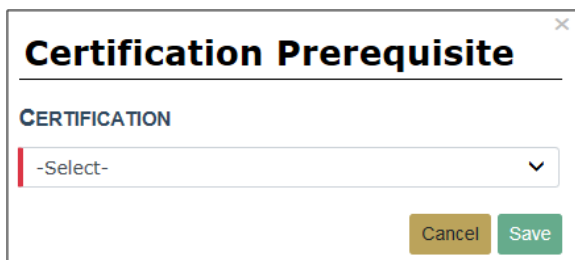
- a. Click the **Delete** icon on the course prerequisite record you want to delete.
- b. A confirmation window appears. Click **OK** to delete or **Cancel** to return to the **Edit Certification** window without deleting.

A confirmation dialog box titled "Message From RMS" with the text "Are You Sure?". At the bottom right, there are two buttons: "No" and "Yes".

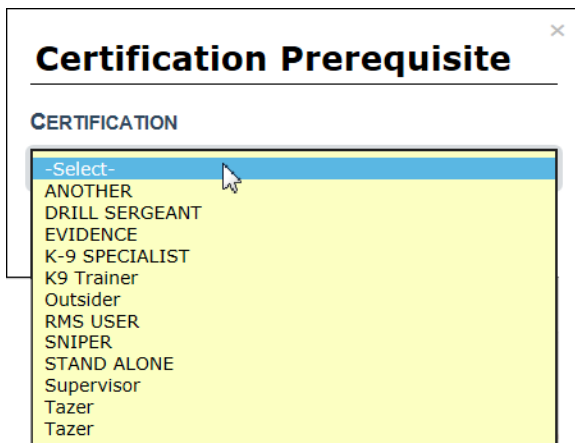
**6. You can Add or Delete (remove) a Certification Prerequisite**

**Add a Certification Prerequisite**

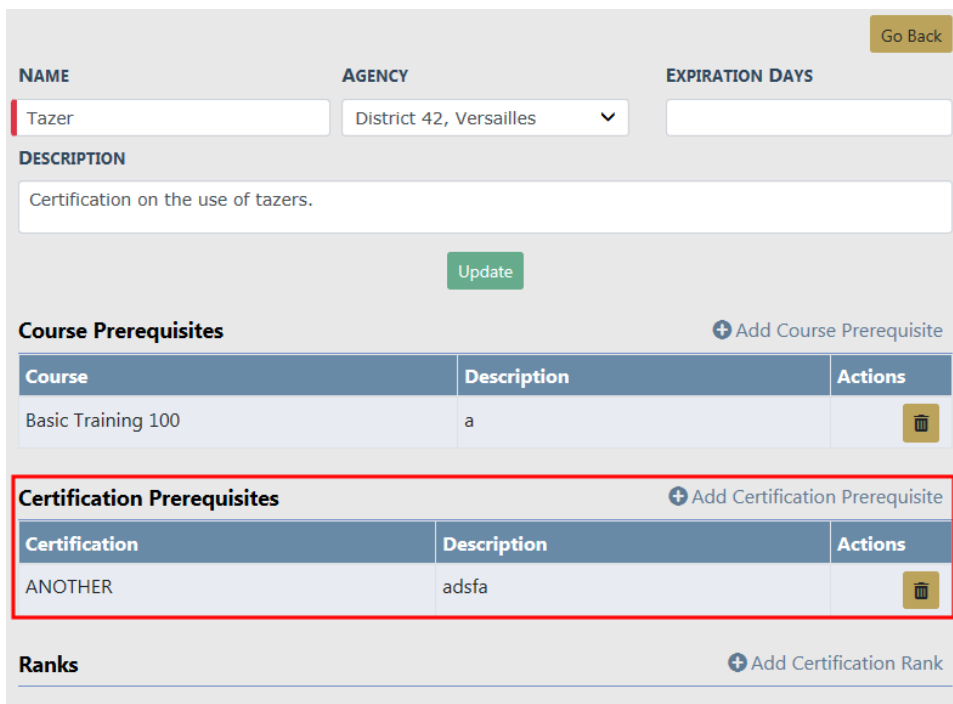
- a. Click on the **Add Certification Prerequisite** link while on the **Edit Certification** form. The **Certification Prerequisite** screen appears.



- b. Click into the **Certification** field and choose a **Certification** from the list that appears. Prerequisites that appear on the list are managed by your administrator. For questions on list content see your administrator.



- c. Click **Save** to add the prerequisite to the certification or **Cancel** to return to the **Edit Certification** screen without adding the prerequisite.



NAME	AGENCY	EXPIRATION DAYS
Tazer	District 42, Versailles	

DESCRIPTION  
Certification on the use of tazers.

Update

**Course Prerequisites** + Add Course Prerequisite


Course	Description	Actions
Basic Training 100	a	

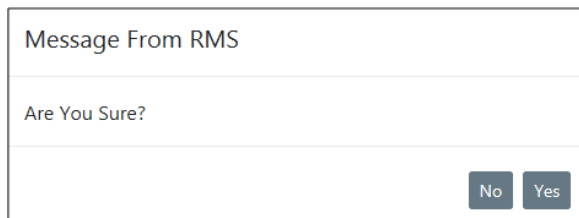
**Certification Prerequisites** + Add Certification Prerequisite

Certification	Description	Actions
ANOTHER	adsfa	

**Ranks** + Add Certification Rank

### Delete Prerequisite from a Certification

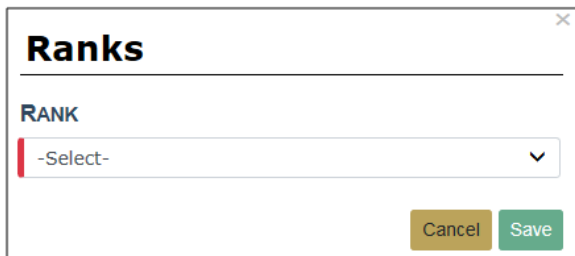
- a. Click the **Delete** icon  on the course prerequisite record you want to delete.
- b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Certification** window without deleting.



### 7. You can *Add* or *Delete* (remove) a **Certification Rank**

#### Add a Certification Rank

- a. Click on the **Add Certification Rank** link while on the **Edit Certification** form. The **Ranks** screen appears.



- b. Click into the **Rank** field and choose a **Rank** from the list that appears. Ranks that appear on the list are managed by your administrator. For questions on list content see your administrator.



- c. Click **Save** to add the rank to the certification or **Cancel** to return to the **Edit Certification** screen without adding the rank.

[Go Back](#)

**NAME**                      **AGENCY**                      **EXPIRATION DAYS**

Tazer                      District 42, Versailles                     

**DESCRIPTION**

Certification on the use of tazers.

[Update](#)

**Course Prerequisites**                      [+ Add Course Prerequisite](#)

Course	Description	Actions
Basic Training 100	a	<a href="#">🗑️</a>


**Certification Prerequisites**                      [+ Add Certification Prerequisite](#)

Certification	Description	Actions
ANOTHER	adsfa	<a href="#">🗑️</a>

**Ranks**                      [+ Add Certification Rank](#)

Rank	Actions
Patrol Officer	<a href="#">🗑️</a>

**Delete Rank from a Certification**

- a. Click the **Delete** icon  on the rank record you want to delete.
- b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Certification** window without deleting.

Message From RMS

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Are You Sure?

[No](#)
[Yes](#)



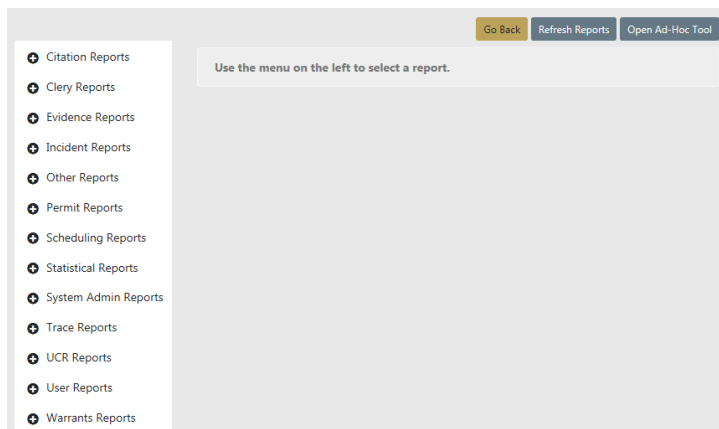
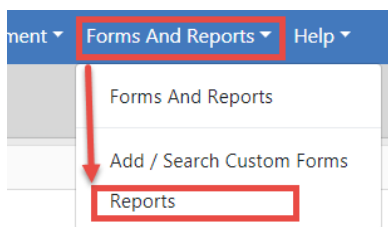
# Chapter 36. Reports

## Reports Overview

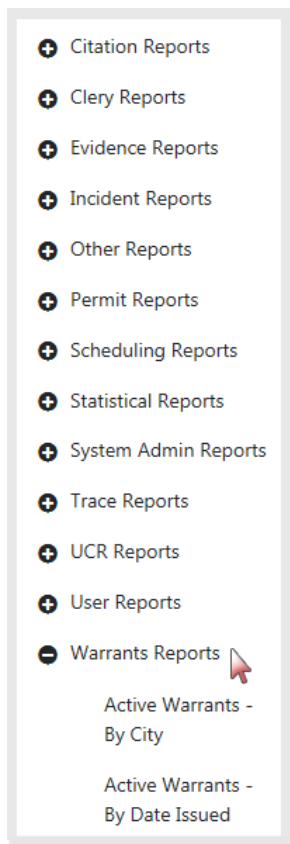
A **Report** returns a set of data in a structured format, so the information is easy to view, follow, and understand. Online RMS offers a variety reports that can be viewed and printed, such as Incident Reports, User Reports, and NIBRS Reports to name a few. Some reports may include charts or graphs that summarize data at a glance.

Available reports vary by agency and permissions. For more information on permissions refer to your administrator.

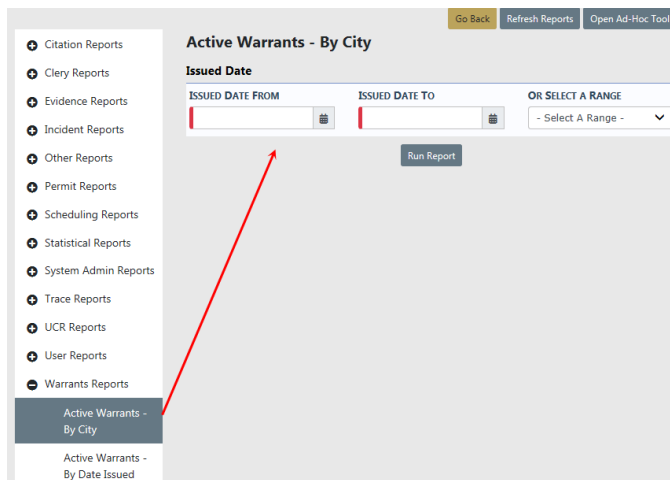
Reports are accessed from the top menu of Online RMS.



Reports are grouped by Module. Click on a Module to view the available reports.



Click on the report you want to generate then enter parameters to restrict the set of records that appear in the report. The *Active Warrants - By City* report below is used as an example.



Page down to the bottom and select the **Output Type** from the drop-down list.



**Output Type**

SELECT AN OUTPUT TYPE

PDF File ▼

Click the **Run Report** button.

The report file downloads to your local machine.



# Chapter 37. Interfaces

## Interfaces Overview

An **Interface** is where two systems meet and interact. Caliber Public Safety leverages this technology to share information between our flagship products. For example, Online RMS accepts Call for Service information from Caliber CAD NG to create RMS Incident Reports and allow users to view CAD Calls for Service (CFS) information while logged into RMS. Another example is where the Court Case Management System (CMS) can retrieve and use Online RMS Citation data using a Web Interface. Standard interface fees may apply to enable an interface.

## Citation to Court Case Management System

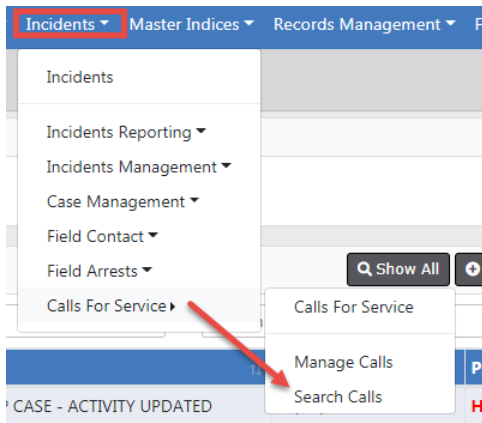
This Online RMS web service loads **RMS Citation** data into the **Court Case Management System (CMS)** as one-way only; data transmits from one system to another but does not return to the originating system.

Request a copy of the *Online RMS Web Services Guide* if you are interested in this interface. The standard interface fee applies to enable this interface.

## CAD to RMS Calls for Service

Online RMS accepts Caliber CAD NG Call for Service (CFS) information to create *RMS Incident Reports* and allow users to search and view CAD CFS information while logged into RMS. CFS data that is spilled from CAD cannot be modified in RMS.

CAD CFS data spilled to Online RMS is searched and viewed from the **RMS Incidents** menu.




A screenshot of the 'Calls For Service Search' form in the Caliber Public Safety system. The form is organized into several sections:

- Dispatch Search Details:** Includes fields for DISPATCH #, DISPATCHER, DISPOSITION TYPE, CALL DATE FROM (with a 'Last 24 Hours' preset), INCIDENT REPORT #, CAD AGENCY (Indiana State Police), EVENT TYPE (Police), STATUS (-Status-), ARREST #, RESPONDING AGENCY (All Agencies), CALL PRIORITY (-Select-), CALLER NAME, CALL DATE TO, NOTES, SERVICE AGENCY (All Agencies), CALL / ACTIVITY (Click To Select), and CALLER PHONE #.
- Officer Details:** Includes fields for FIRST NAME, LAST NAME, INTERNAL ID / BADGE#, SEARCH CALLS I'VE RESPONDED TO, and PRIMARY OFFICER ONLY.
- Person Details:** Includes fields for FIRST NAME, LAST NAME, DOB, RACE, SEX, and ROLE.
- Vehicle Details:** Includes fields for VIN, YEAR, MAKE, and MODEL.

At the top right of the form, there are 'Go Back' and 'Search' buttons.

Enter the search criteria and click the **Search** button to display *Search Results*.

Click on the **View** icon  that appears in the *Actions* column of the *Search Results* to view CFS details spilled from CAD.

<a href="#">Go Back</a> <a href="#">Print</a> <a href="#">Switch To Edit Status</a>		
<b>Dispatch Info - 2012387</b>		
DISPATCHER DEB		
DISPATCH AGENCY Indiana State Police	CALL DATE	
CALL RECEIVED O	CALLER NAME BF20598	CALLER PHONE # (0) -
PRIORITY High	EVENT TYPE Police	CALL / ACTIVITY FIRE
DISPOSITION TYPE	CLOSE DATE 10/30/2012 11:46	
INCIDENT NOTES		
<b>Location</b>		
INCIDENT LOCATION 123 TOWN BLVD	CALLER LOCATION	
COMMON PLACE NAME	REPORTING AREA	
LATITUDE	LONGITUDE	
<a href="#">Go Back</a>		

**NOTE:** For more information on searching CFS records refer to "Search Calls for Service" on page 157.

## InterDEx Queries

When searching directly from the Person, Vehicle or Property tab on the Master Indices screen, select the **Search External Systems** link to expand the list of available search interfaces for the master indices.

The Search interface displays under the **Search External Systems** button if you have the correct permissions. In this section, hovering over the information bubble by the interface name will determine the required attributes the user must enter for the search to execute.

The *Search Status* column contains the **Status** of the Interface. The Status indicates if all required attributes have not been populated for the search.

Once all the required attributes have been met, the Status will change to **Ready**. The Person, Vehicle and Property Master Indices search tabs all work the same.

Once you have the information complete and select **Search**, the Search results will display on a separate tab.

While viewing or editing a specific person, property or vehicle record, the user may execute an *InterDEx* query for more information by selecting **InterDEx Search**. Online RMS will execute the query for the specific person, property, vehicle record being viewed.

Online RMS displays a candidates list of potential matching results returned from *InterDEx* on a separate tab. Select **Show Details** to view additional information known for the person. Select **Import Record** to create a new master person record using the name information returned.

For details on importing a person record, refer to the *Import/Update Person Results from External Systems* section of "Adding Person" on page 85.

## Hunter Camera

If configured for your agency, you can take photos directly from the Online RMS Field Arrest or Master Person Index record using the **Hunter Camera** integration software installed on your local machine. The software associates the images with the *Master Person Index* record.

### General Guidelines

- One or multiple Hunter Cameras can be configured. If multiple, then you can choose which camera to use.
- Online RMS requires that the person record have a recent physical description. If the physical description is not recent, Hunter Camera prompts you to enter a new description.

## Take Photos

Follow these steps to take photos from the Field Arrest or Master Person record using the **Hunter Camera** integration software:

1. Edit the Field Arrest or Master Person Index record, then click on the **Hunter Camera** button on the top right of the screen.



If your agency and local machine is configured to use multiple Hunter Cameras, first **select** a camera from the drop-down list, then click on the **Hunter Camera** button.



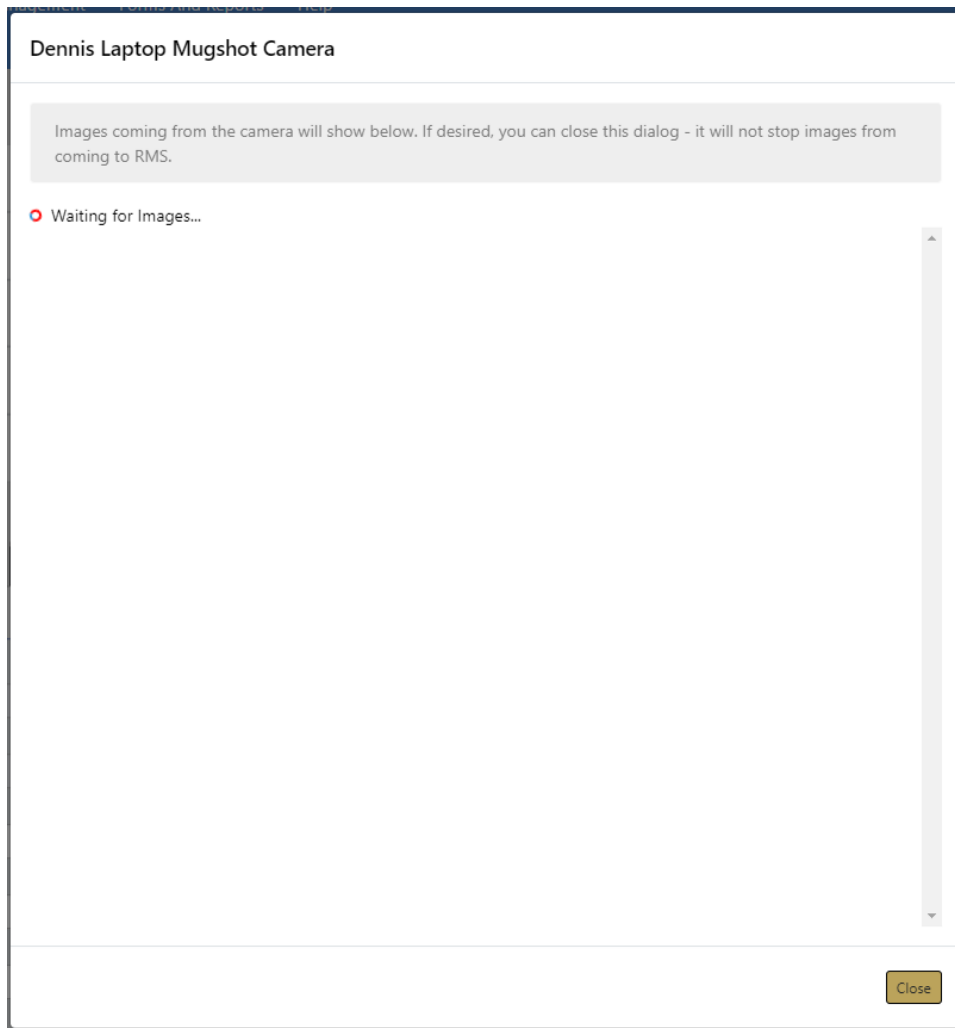
2. If the person's physical description does not exist or is not recent when you click on the camera button, a dialog box appears asking you to enter the physical description.

### Physical Description

<p><b>HEIGHT</b></p> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid gray; padding: 2px;">-Select-</div> <div style="border: 1px solid gray; padding: 2px;">-Select-</div> </div> <p><b>EYE COLOR</b></p> <div style="border: 1px solid gray; padding: 2px;">-Select-</div> <p><b>FACIAL HAIR</b></p> <div style="border: 1px solid gray; padding: 2px;">-Select-</div> <p><b>BUILD</b></p> <div style="border: 1px solid gray; padding: 2px;">-Select-</div> <p><b>HAIR STYLE</b></p> <div style="border: 1px solid gray; padding: 2px;">-Select-</div> <p><b>AGE</b></p> <div style="border: 1px solid gray; padding: 2px;">110</div>	<p><b>WEIGHT</b></p> <div style="border: 1px solid gray; height: 20px;"></div> <p><b>HAIR COLOR</b></p> <div style="border: 1px solid gray; padding: 2px;">-Select-</div> <p><b>HAIR LENGTH</b></p> <div style="border: 1px solid gray; padding: 2px;">-Select-</div> <p><b>SKIN COLOR</b></p> <div style="border: 1px solid gray; padding: 2px;">-Select-</div> <p><b>GLASSES</b></p> <input type="checkbox"/> <p><b>DATE OF INFO</b></p> <div style="border: 1px solid gray; padding: 2px;">07/21/2020</div>
--	--

- a. Enter data in the fields provided or click **Populate From Most Recent** on the bottom of the dialog box to pull in existing data then make the necessary updates.
  - b. Click **Save**.
  - c. The physical description saves and associates to the *Master Person Index* record.
3. **Take** the picture then click **Send** in the Hunter Camera software.
  4. The Hunter Camera dialog box appears, waiting for the images to save to the *Master Person Index* record.





**Note:** You can close the dialog box or keep the dialog box open while another user transmits other images from the Hunter Camera software on their machine; as images transfer to the *Master Person Index* record, the images appear on the upper right of the Field Arrest record.

## LiveScan

If configured for your agency, you can transmit arrest and arrestee information, including images to **LiveScan** directly from the Field Arrest record.

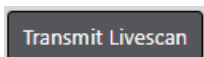
## General Guidelines

- Images and the arrestee's physical descriptions are associated with the *Master Person Index* record and not the Field Arrest.
- LiveScan interface requires the arrestee's birth country, birth date, OBTN, and other data. LiveScan prompts you to enter missing data.
- An OBTN is required for LiveScan. If a OBTN does not exist on the Field Arrest, Online RMS creates one automatically.
- Images are not required, but if they exist, the images associated with the most recent physical description are sent through the LiveScan interface.
- LiveScan accepts front, right, and left profile images along with SMT images.

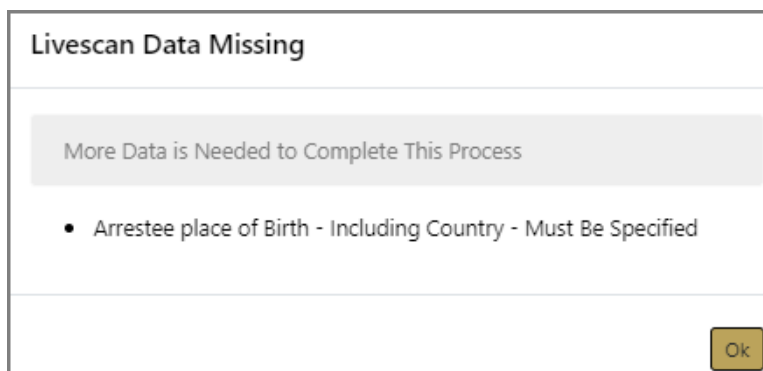
## Transmit LiveScan

Follow these steps to transmit Field Arrest data and any images to LiveScan:

1. Access the *Edit Field Arrest* of the appropriate Field Arrest record.
2. Click on the **Transmit Livescan** button on the top right of the *Edit Field Arrest* screen.



3. If LiveScan detects missing data, a dialog box appears with instructions.



- a. Click **OK**.
- b. Enter the missing information, then click the **Transmit Livescan** button again.

4. Online RMS generates an OBTN number automatically if it doesn't exist.
5. A green *successful transmission* message briefly appears across the top of the screen when the transmission completes successfully.



Livescan Data Successfully Transmitted

**Note:** If configured for your agency and the proper software is installed on your machine, you can take photos directly from the Field Arrest or Master Person Index record using the **Hunter Camera** integration software. For more information, refer to “Hunter Camera” on page 735.



# Appendix A. Training Accounts

## Generic Training Accounts

When you connect to the Online RMS Training Database, you may utilize any of the following generic accounts. Each role has a selection of accounts and can be used by multiple individuals. These accounts are available for any actions you wish to perform in the Online RMS system. The training system does not contain any real criminal data so please ensure you only enter test data. For example, we often use cartoon characters or invented names and identifiers. Real address locations can be utilized to view the mapping functionality.

Simply go to the following website to enter the Online RMS Training DB:

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

Training Accounts user IDs and passwords will be distributed by the administrator.

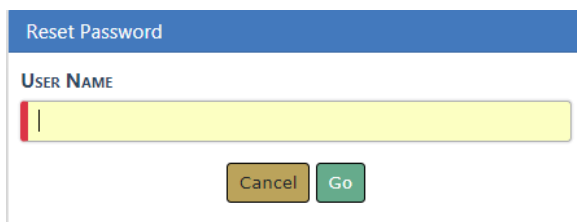


# Appendix B. Resetting Passwords

## Resetting OnlineRMS Password

This guide explains how to reset the Online RMS password from the workstation web browser.

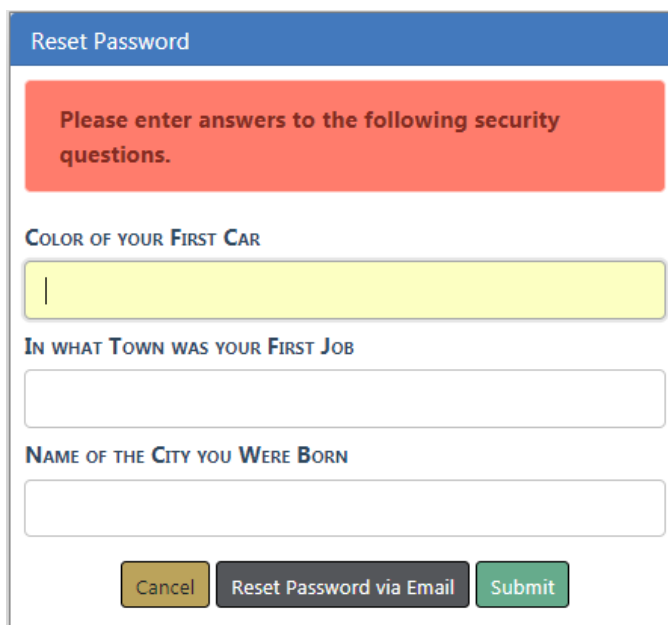
- Click the **Reset Password** link at the Online RMS login screen.
- Type the **User ID** and click the **Go** button.



The screenshot shows a web form titled "Reset Password" with a blue header. Below the header is a label "USER NAME" above a yellow input field. At the bottom of the form are two buttons: "Cancel" (grey) and "Go" (green).

- For added security, the user will be prompted with three security questions. There are different questions available and they are configurable by the administrator or user with proper permissions. Answer the security questions and click the **Submit** button.

Questions can vary by user and apply only when configured.



The screenshot shows a web form titled "Reset Password" with a blue header. Below the header is a red box with the text "Please enter answers to the following security questions." Below this are three input fields with labels: "COLOR OF YOUR FIRST CAR", "IN WHAT TOWN WAS YOUR FIRST JOB", and "NAME OF THE CITY YOU WERE BORN". At the bottom of the form are three buttons: "Cancel" (grey), "Reset Password via Email" (dark grey), and "Submit" (green).

**NOTE:** If you have forgotten your password click on the **Reset Password via Email** link to receive a confirmation email. For further assistance contact your agency administration or refer to "Forgotten Password Procedure" below

**NOTE:** If no user security questions are found in the system, a window appears where you must reset your password via email.

- Once the credentials are validated, the user is taken to the *Change Password* screen.
- The password rules are as follows:
  - The minimum password length shall be 8 characters.
  - Passwords shall be case sensitive.
  - Passwords shall be alphanumeric and allow for special characters.
  - Passwords shall contain at least one lower case, one capital letter, and one number
  - Passwords shall need to be reset every 90 days.
  - Passwords will be on a rotation of three (10) passwords.
  - The maximum amount of password attempts is five (5). Once the account is locked, the password will need to be changed.
- Type a new password in the **Enter** and **Re-Enter** fields and click **Submit**.
- A warning message will appear if the password rules are not followed.
- Once completed, the user will be transported to their *Home* screen.

**NOTE:** Click the **Cancel** button to abort the process at any time.

## Forgotten Password Procedure

With the release of Online RMS 10.9, we have instituted a security policy that every user have a unique email address associated to their account. This requirement grants users with improved, self-administered password resets.

**NOTE:** In addition, this complies with the CJS policy many of our users must follow. For information about this and the email address

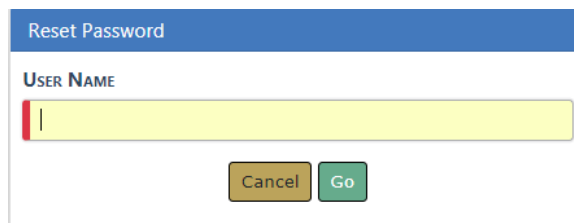


requirement, review the additional document called Secure Email Account Requirement for Online RMS users.

To facilitate the self-administration for forgotten passwords and/or security questions, Caliber Public Safety has implemented a new **Reset Password** procedure at the Online RMS login screen.

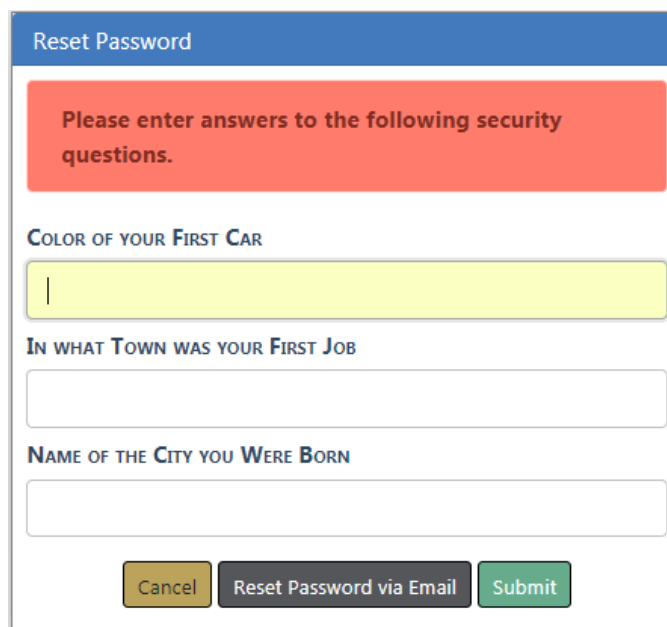
The reset password procedure will work in the following fashion:

1. At the Online RMS login screen, click the **Reset Password** link.
2. Type the **User ID** and click the **Go** button.



The screenshot shows a web form titled "Reset Password". It features a blue header bar with the text "Reset Password". Below the header is a label "USER NAME" followed by a yellow input field. At the bottom of the form are two buttons: "Cancel" and "Go".

3. Click on the **Reset Password via Email** link to receive a confirmation email



The screenshot shows a web form titled "Reset Password". It features a blue header bar with the text "Reset Password". Below the header is a red box with the text "Please enter answers to the following security questions." Below this are three input fields with labels: "COLOR OF YOUR FIRST CAR", "IN WHAT TOWN WAS YOUR FIRST JOB", and "NAME OF THE CITY YOU WERE BORN". At the bottom of the form are three buttons: "Cancel", "Reset Password via Email", and "Submit".

4. You are prompted to provide the unique email address on file for your user account. Enter the email address then click the **Go** button. A confirmation message displays on screen:

"A new password has been sent to your email address. Please follow the instructions on the email for further information."

If an incorrect email address is given, an error is presented and you cannot continue with the password reset.

5. An email is sent to you from Online RMS with the new temporary password.
6. Login with your User ID and this temporary password. You must re-register your account by:
  - Providing three new and unique security questions (using the drop down fields).
  - Providing answers to these new security questions.
  - Resetting and confirm a new password (following the same secure password rules when they initially registered their accounts)

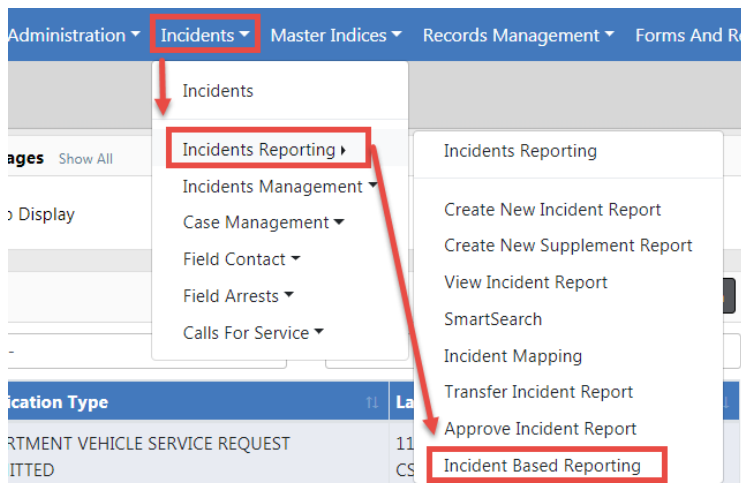
# Appendix C. Incident Based Reporting

## Overview

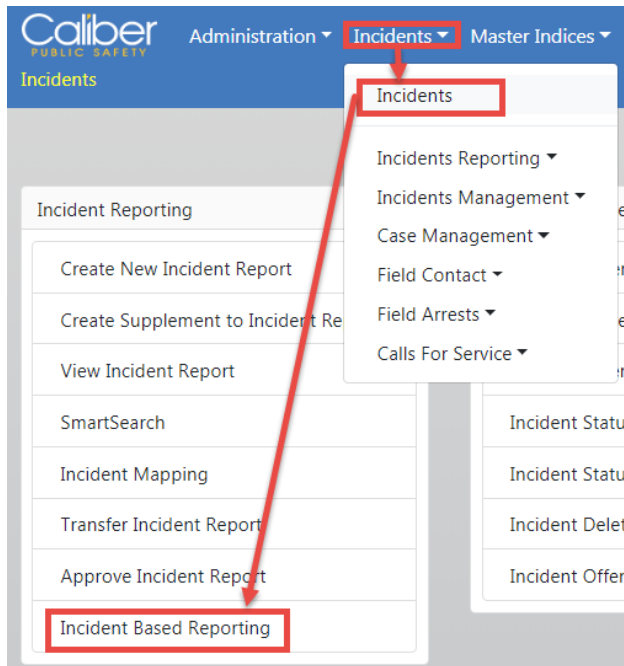
The purpose of this document is to provide instructions on producing Incident Based Reports from the Online RMS application. The application collects FBI data based on the National Incident Based Reporting (NIBRS) requirements.

You access a data set (file) that contains all Agency reports that have a reportable offense that is in approved status. They filter out the reports for inclusion in the file to be used to create the NIBRS Reports. This is typically on a monthly basis but can be filtered as necessary.

1. From your *Home* page there are three ways to access the **Incident Based Reporting** module of the application.
  - a. Incidents>Incident Reporting>Incident Based Reporting

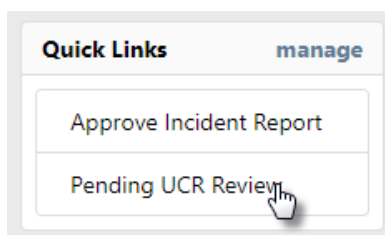


- b. Click on the *Incidents* tab and when the *Main Incident Menu* opens find **Incident Based Reporting** under the *Incident Reporting* header.



- c. If available, click on the **Pending UCR Review** link in the *Quick Links* box. If the **Pending UCR Review** link doesn't appear, you can with appropriate permissions, add this link to the *Quick Links* box. This appears only on your Home Page, no one else's. For instructions, refer to the Quick Link section of "Home Page " on page 8.

**Note:** While UCR functionality is still available within Online RMS, the FBI is no longer accepting UCR Summary Data as of Jan 1, 2021.



Any option above opens the *Data Sets* details page:

Caliber PUBLIC SAFETY Administration Incidents Master Indices  
Incident Based Reporting

Data Sets [hide icon]

SELECT AGENCY  
Indiana State Police

**Open Data Sets**

Total Incidents	Actions
9	[edit icon]

**Closed Data Sets** Recent | Last 12 | All

Filter on Data Set ID... [Apply]

Data Set	Actions
072017-2 22	[edit icon]
012015-1 13	[edit icon]
121992-1 0	[hide icon]

## 2. Accessing *Open Data Sets*.

- Find the *Open Data Set* you want to open and click on the **Edit** icon [edit icon] under the *Actions* column.

The right windows display six tabs of *Open Data Set* topics, defaulting to the **Data Set** tab.

Data Sets [hide icon]

SELECT AGENCY  
Indiana State Police

**Open Data Sets**

Total Incidents	Actions
13	[edit icon]
0	[edit icon]

**Closed Data Sets** Recent | Last 12 | All

Filter on Data Set ID... [Apply]

Data Set	Actions
072017-2 22	[edit icon]
012015-1 13	[edit icon]
121992-1 0	[hide icon]

112018-1 [Go Back]

**Data Set** Submission Details Warnings Submission File Statistics Submission Summary

SUBMISSION DATE

Month [dropdown] Year [dropdown] [Next]

## 3. Accessing *Closed Data Sets*.

- Find the *Closed Set* you want to open and click on the **Edit** icon [edit icon] under the *Actions* column.

The right windows display two tabs of *Closed Data Set* topics, defaulting to the **Closed Data Set** tab.

The screenshot displays the 'Closed Data Set' interface for the agency 'Indiana State Police'. The main content area is titled 'Data Set: 012015-1' and features two tabs: 'Closed Data Set' (selected) and 'Warning Notification History'. A red box highlights the 'Closed Data Set' tab, with a red arrow pointing to it from the 'Closed Data Sets' list on the left sidebar.

**Open Data Sets**

Total Incidents	Actions
13	[Icon]
0	[Icon]

**Closed Data Sets**

Recent | Last 12 | All

Filter on Data Set ID... [Apply]

Data Set	Actions
072017-2 22	[Icon]
012015-1 13	[Icon]
121992-1 0	[Icon]

**Statistics**

Total Incidents:	13
Accepted Incidents:	13
Rejected Incidents:	0
Balance:	0

**System Download File**

System	Download File	File Date
CLERY		
NIBRS	310_NIBRS.txt	07/21/2015 1434
SCIBRS		

One or more Systems is compatible with XML Generation.

**System # of Files Generated**

System	# of Files Generated	Actions
NIBRS	0 / 13	[Icon] [Icon]

Search and select incident reports with errors and mark as 'Rejected'

**REPORT #S:**  **STATUS:**

[Apply Filter] [Reset]

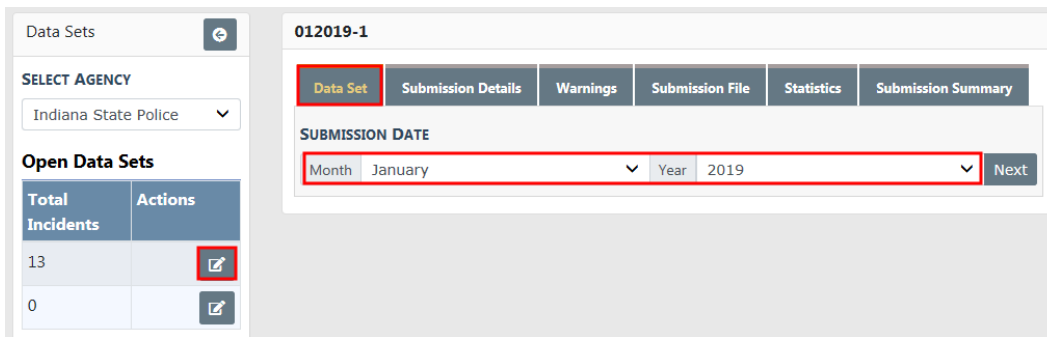
Action	Agency	Report Number	Occurrence Date	Report Date	Offenses	Submission Status	Actions
ACCEPTED	District 42, Versailles	2015ROOT0122	04/28/2015	04/28/2015	MURDER	ACCEPTED	[Icon]

## Role and Permission Requirements

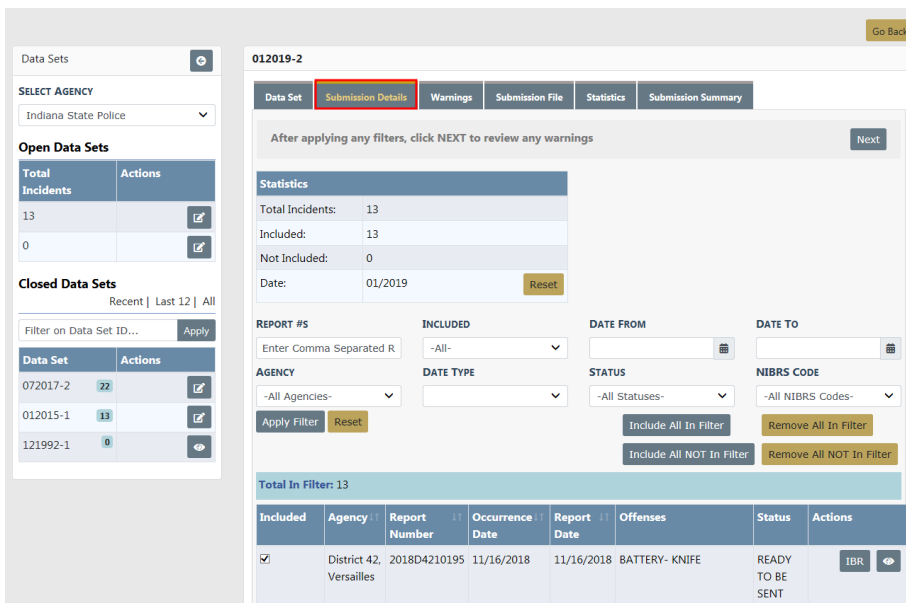
To perform this procedure it is necessary that a user have the role of **LEA\_RECORDS\_MGMT** and/or the permission of **Incident Based Reporting**. The permission can be assigned to any role that the agency administrator would like. Please Contact Online RMS Support for assistance on any changes.

## Filter

1. Enter the **Month** and **Year** of the reports that you want to report with this file. If you have not completed this action before you need to start at the Month and Year that you began using this application, then create Submission File by Month until you reach the present.

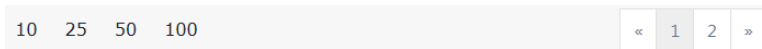


2. Click the **Next** button to filter the reports. The *Search Results* page will then display under the **Submission Details** tab. This may take a minute depending on the number of reports in the selected month.



## Reports on Page Adjustment

1. You can adjust the number of reports on each page by scrolling down. At the bottom left of the page you can select the number of reports you want to see on a page.



2. On the bottom right of the page the number of pages display based on your previous selection and the number of reports.

## Additional Filters

1. If necessary you can enter criteria in the additional filter fields and **Apply Filter** to further define the reports you are reporting.

2. Unchecking individual reports.
  - a. If find reports you do not want to include, uncheck the checkbox in the *Included* column on the left side. An **Update Selected** button appears on the upper right once you uncheck a box. Click the **Update Selected** button.

Included	Agency	Report Number	Occurrence Date	Report Date	Offenses	Status	Actions
<input type="checkbox"/>	District 42, Versailles	2018-08-220-000015	08/08/2018	08/08/2018	BURGLARY-AUTO/BOD...	READY TO BE SENT	IBR
<input checked="" type="checkbox"/>	District 42, Versailles	2018-08-218-000014	08/06/2018	08/06/2018	ROBBERY-DOCTORS O...	READY TO BE SENT	IBR
<input checked="" type="checkbox"/>	District 42, Versailles	2017D4210062	02/27/2017	02/27/2017	THEFT-AGRICULTURE	READY TO BE SENT	IBR

3. Click the **Next** button to advance to the **Warning** tab.

## Warnings

The Warning tab provides the opportunity to self-audit incident reports included in the data submission that may be at risk of a data audit by the IBR authority



012019-2

Go Back

Data Set Submission Details **Warnings** Submission File Statistics Submission Summary

After reviewing any warnings (if applicable), click NEXT to generate the submission file. **Next**

Warnings Warning Notification History ← Two sub-tabs

The Data Audit Warnings tab provides the opportunity for an agency to self-audit incident reports included in the data submission that may be at risk of a data audit by the IBR authority. Data audits represent data situations that are commonly flagged by IBR authorities as uncommon or overly used that should be evaluated by the agency prior to submission. The goal of this process is to ensure the quality and accuracy of data submitted to the IBR authority.

# of Affected Incidents	Type	Message
1	NIBRS	Incident has both Burglary and Theft offenses. Because larceny/theft is an element of Burglary, agencies should not report the larceny as a separate offense if it is associated with the unlawful entry of a structure. Please verify that the larceny is a separate offense. If not, remove it from the incident.
1	NIBRS	Incident was listed as being a Cargo Theft. Please review the incident and verify that a cargo theft actually occurred.
4	NIBRS	Incident contains a Hate Bias Motivation. Please verify that Hate/Bias was a factor in the incident.
2	INCIDENT	Incident contains an offender 10 years old or younger. Please verify this for accuracy.
1	NIBRS	Incident contains a Hate Bias Motivation of Unknown. The state and federal IBR authorities will expect this to be updated as the investigation of an incident continues. Failure to update can trigger an audit in the future.

1. Review the warnings.
2. Click the **Next** button to advance to the **Submission File** tab.

## Generate the Submission File

There are two types of submission files:

- Flat Files

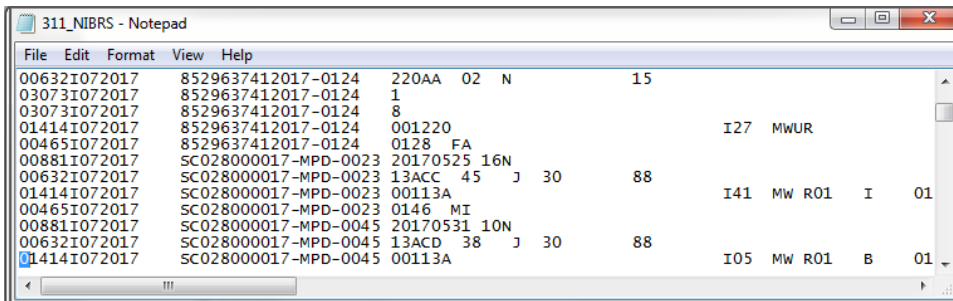
A flat file contains data that is stored in plain text format, and there is one record per line. Columns are typically separated by a tab, comma, or another single value character; Online RMS creates flat files with tabs to separate the columns.

- XML Files

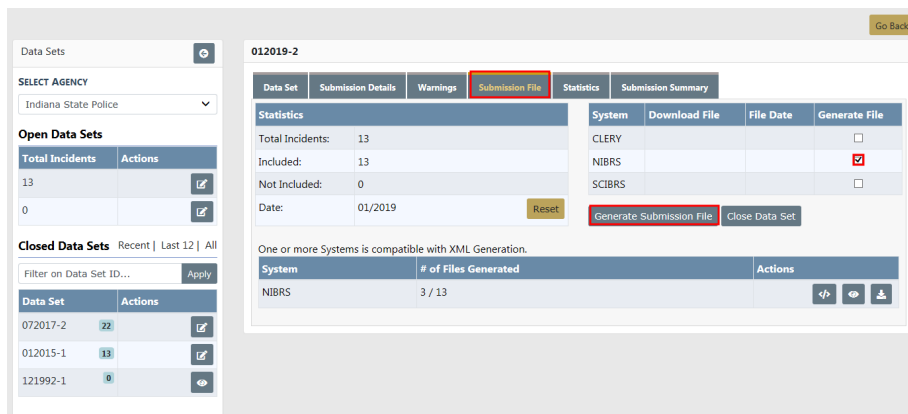
An XML file is an XML (Extensible Markup Language) data file. They are plain text files that store information in a hierarchical standard format that is commonly used in data transfers. Unlike flat files, *custom tags* are used in XML files instead of *tabs* to define different columns of data.

### Flat File

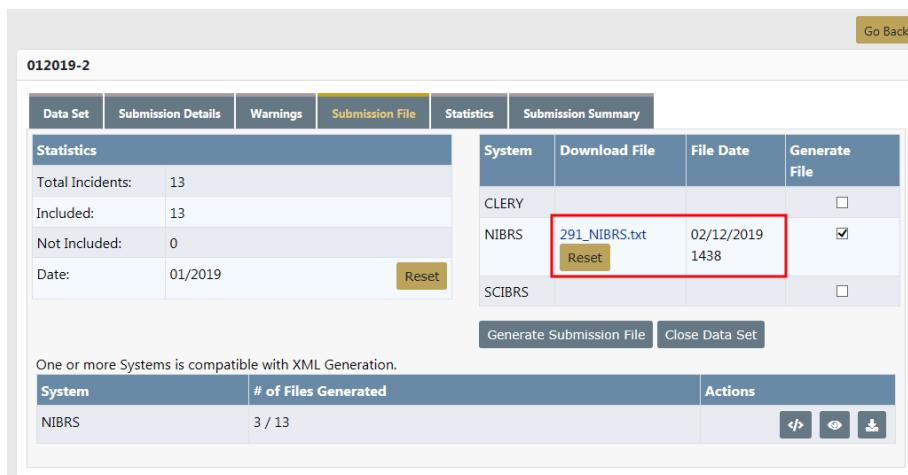
A flat file contains data that is stored in plain text format, and there is one record per line. Columns are typically separated by a tab, comma, or another single value character; Online RMS creates flat files with tabs to separate the columns.



1. To generate the submission file you must first check the appropriate checkboxes in the *Generate File* column, then click the **Generate Submission File** button.



- a. Depending on the number of files being included in this file, it may take a few minutes to generate the file. Once complete the **Download File** and **File Date** will fill in.



- b. Agencies reporting by **Summary UCR Reports** will then click the **Close Data Set** button on the right side of the page. Note the number in the **Download File** name, as this will help you locate it later when running UCR Reports. You will also be able to locate the correct file as the Month and Year will be added next to the file name along with your ORI.

System	Download File	File Date	Generate File
CLERY			<input type="checkbox"/>
NIBRS	291_NIBRS.txt <span>Reset</span>	02/12/2019 1438	<input checked="" type="checkbox"/>
SCIBRS			<input type="checkbox"/>

Generate Submission File Close Data Set

This will close the Data Set and place it in the *Closed Data Set* list on the left side of the page.

Data Sets ↻

**SELECT AGENCY**

Indiana State Police ▼

**Open Data Sets**

Total Incidents	Actions
0	<span>✎</span>

**Closed Data Sets** Recent | Last 12 | All

Filter on Data Set ID... Apply

Data Set	Actions
072017-2 <span style="float: right; font-size: x-small;">22</span>	<span>✎</span>
012015-1 <span style="float: right; font-size: x-small;">13</span>	<span>✎</span>
121992-1 <span style="float: right; font-size: x-small;">0</span>	<span>👁</span>

### XML File

An XML file is an XML (Extensible Markup Language) data file. They are plain text files that store information in a hierarchical standard format that is commonly used in data transfers. Unlike flat files, *custom tags* are used in XML files instead of *tabs* to define data.

```
<?xml version="1.0" encoding="UTF-8"?>
- <nibrs:Submission xmlns:s="http://release.
xmlns:nc="http://release.
xmlns:j="http://release.
xmlns:cjis="http://fbi.gov/
- <cjis:MessageMetadata>
  <cjis:MessageDateTime>2019-12-19T12:21:42</cjis:MessageDateTime>
  - <cjis:MessageIdentification>
    <nc:IdentificationID>NCO 2019-0989</nc:IdentificationID>
  </cjis:MessageIdentification>
  <cjis:MessageImplementationVersion>4.2</cjis:MessageImplementationVersion>
  - <cjis:MessageSubmittingOrganization>
    - <j:OrganizationAugmentation>
      - <j:OrganizationORIIdentification>
        <nc:IdentificationID>NCO</nc:IdentificationID>
      </j:OrganizationORIIdentification>
    </j:OrganizationAugmentation>
  </cjis:MessageSubmittingOrganization>
</cjis:MessageMetadata>
- <nibrs:Report>
  - <nibrs:ReportHeader>
    <nibrs:NIBRSReportCategoryCode>GROUP A INCIDENT
    REPORT</nibrs:NIBRSReportCategoryCode>
    <nibrs:ReportActionCategoryCode>R</nibrs:ReportActionCategoryCode>
  - <nibrs:ReportDate>
    <nc:YearMonthDate>2019-11</nc:YearMonthDate>
```

The **Statistics** section on the *Submission File* tab help you to identify how many reports were in the original query and how many you did not include.

The **System** type section is specific to your agency or State. NIBRS is the basic, and is used by all agencies that report by Summary UCR Reports, and agencies that report directly to the NIBRS Unit at the FBI.

112019-1

Data Set | Submission Details | Warnings | **Submission File** | Statistics | Submission Summary

Statistics	
Total Incidents:	70
Included:	70
Not Included:	0
Date:	11/2019 <span>Reset</span>

System	Download File	File Date	Generate File
NIBRS			<input type="checkbox"/>

Generate Submission File | Close Data Set

One or more Systems is compatible with XML Generation.

System	# of Files Generated	Actions
NIBRS	66 / 70	

**# of Files Generated**

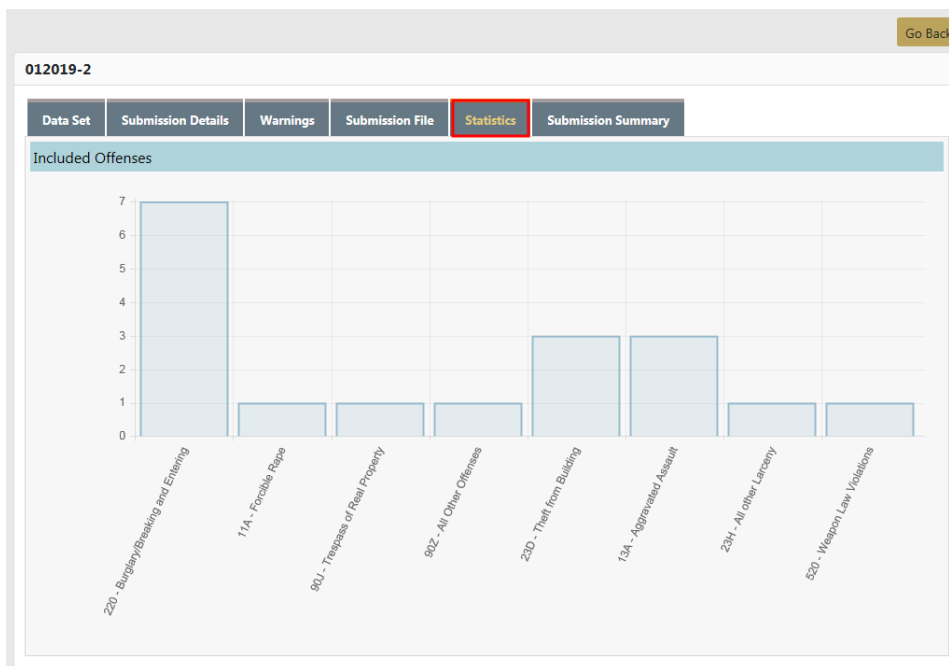
66 / 70 ← 66 out of 70 files generated

For more information on XML submission files, refer to the *Incident Based Reporting Guide* found under the Help Menu in Online RMS.

## Statistics Report

The **Statistics** tab is to help you identify how many reports were in the original query and how many you did not include if you unchecked any reports. In the center is the **System** type that is specific to your agency and/or state. NIBRS is the basic and will be used by all agencies that report by **Summary UCR Reports** and those agencies reporting directly to the NIBRS Unit at the FBI.

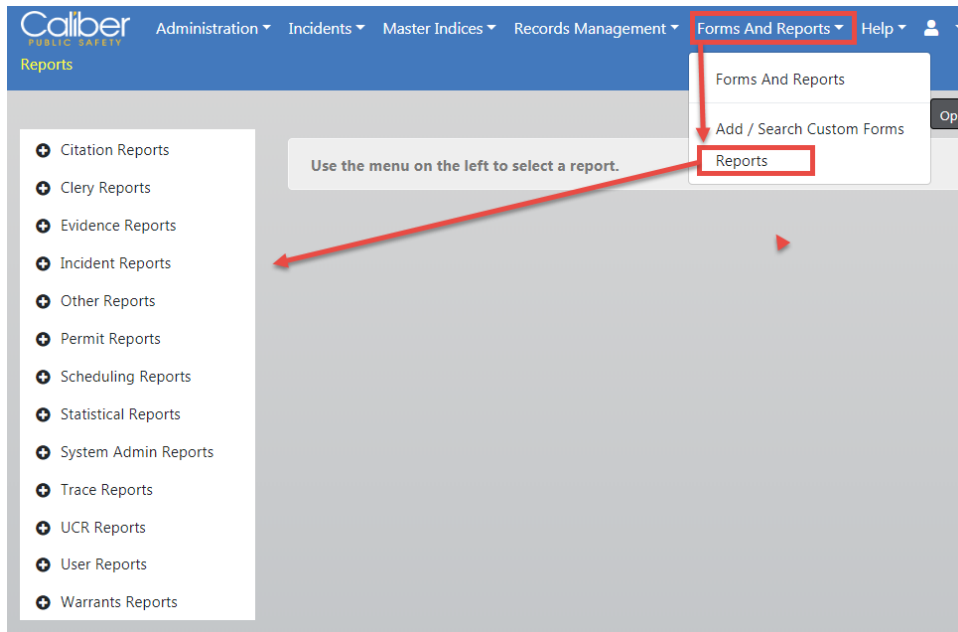
**Note:** While UCR functionality is still available within Online RMS, the FBI is no longer accepting UCR Summary Data as of Jan 1, 2021.



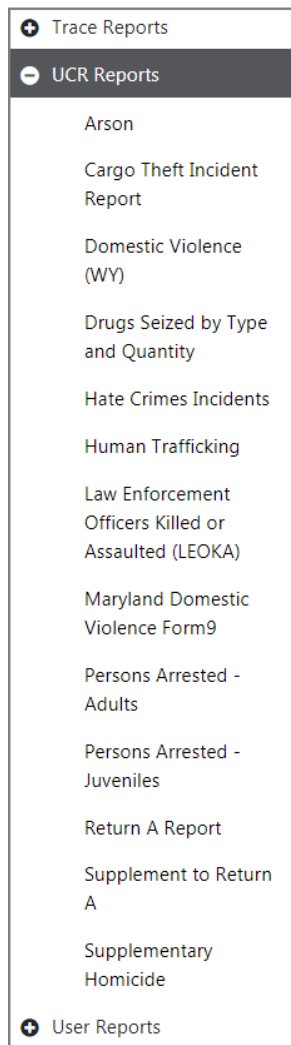
## Run Summary UCR Reports

**Note:** While UCR functionality is still available within Online RMS, the FBI is no longer accepting UCR Summary Data as of Jan 1, 2021.

1. From your *Home* page click on the **Forms and Reports** tab at top of screen. Then click on **Reports**.



- a. On the left is a list of *Report Category*, click on the **UCR Reports** category banner to display the UCR available reports in alphabetical order.



- b. Click on the Report you wish to run, most likely the **Return A**. A filter opens on the right of the window.

**Return A Report**

Return A Report UCR Report. UCR reports are only available for agencies using the standard FBI NIBRS configuration.

**Report Parameters**

**DATA SET(S)**

Search... Select All Select None

- 320 - 1 - July 2015 - D16
- 315 - 1 - January 2015 - D13
- 314 - 1 - February 2015 - D13
- 313 - 1 - July 2015 - D13
- 311 - 23 - July 2017 - IPSC
- 310 - 14 - January 2015 - IPSC

**SHOW DETAIL**

**HEADER NOTE**

**Output Type**

**SELECT AN OUTPUT TYPE**

PDF File

**Run Report**

- c. Click on the **Data Set** file or files you want to include. You can also enter search criteria to shorten the available list.

The format of the listed files:

*291 – 13 – January 2019- IPSC* (291 is the file number you created, 13 is the number of reports in the file and Month Year is based off the median date of those reports. And then of course your ORI#)

**Report Parameters**

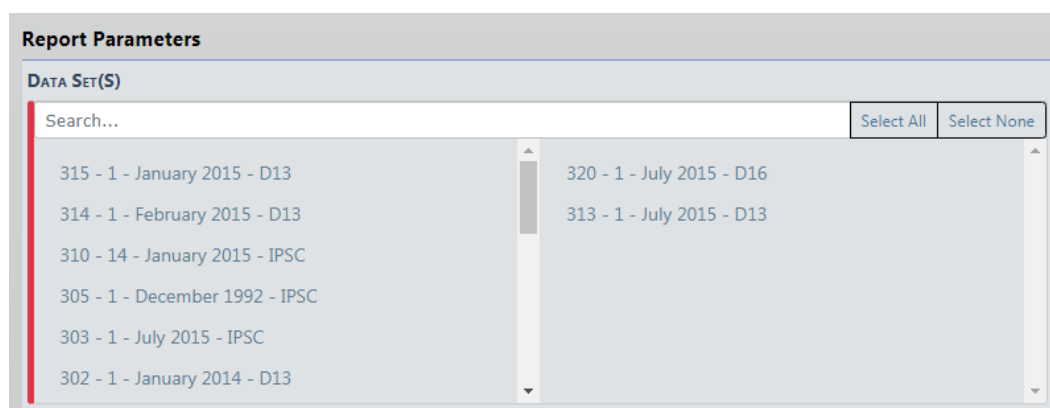
**DATA SET(S)**

Search... Select All Select None

- 320 - 1 - July 2015 - D16
- 315 - 1 - January 2015 - D13
- 314 - 1 - February 2015 - D13
- 313 - 1 - July 2015 - D13
- 311 - 23 - July 2017 - IPSC
- 310 - 14 - January 2015 - IPSC

The selected parameters move from the left to the right window. To deselect a parameter, click on the parameter in the right window to move it back to the left.






- d. If **Show Detail** button is selected, the report lists the report number that the returned data was from so that you can verify any information that does not appear to be accurate. The button turns green when selected, otherwise it remains gray.
- e. It is recommended that you enter something into the **Header Help** field to help you identify the report that you are about to create, i.e. January 2019, December 2018, etc. Then click **Run File**.  
**NOTE:** Creating the file may take several minutes to complete.
- f. Once completed open the PDF file that was created then **Print** or **Save**. You will then need to enter this information into the Worksheet file that was provided by the UCR Unit of the FBI or report UCR data to your State Reporting Agency as they have specified.

## Finalize Data Set

1. Once you have completed your **Reports** it is necessary that you **Finalize** the **Data Set** that you closed when making the file. Return to the *Incident Based Reporting* page. Find the Data Set that you closed under the *Closed Data Sets* list.

For more information on accessing the *Incident Based Reporting* page, refer to "Overview" on page G.

2. Click the **Edit** icon  under the *Actions* column next to that file. It asks you if any errors were reported. As Summary UCR Reporting Agency you do not get an error report, so click the **No** button.

If errors were reported and you want an error report, click **Yes**. For more information, refer to "Errors Reported" on the next page.

3. A warning displays stating this will set all Incidents to *Accepted* and *Finalized*. Click **Yes**.

4. The necessary actions on this **Data Set** are now complete.

## Errors Reported

1. If errors are reported, click **Yes**.
2. A list of the reports appear. You can filter the list by entering one or more report numbers into the **Report#** field. Separate reports with a comma. Click **Apply Filter**.
3. Click the Apply Filter button as **Rejected**.
4. Click the **Update** button.
5. A message appears stating the action cannot be undone. Click **Yes** to continue or **No** to cancel.
6. You are returned to the report list to accept all the other reports.

## Accepting Reports after Error Reports have marked Rejected

1. Once you have rejected the reports with errors you must mark all the other reports as accepted.
2. If your file has more than 50 or 100 records go to the bottom of the page and change the page count to 100, then return to the top of the list.
3. Click on the button **Apply Status to All on Page**.
4. Open this list and select **Accepted**.
5. Once selected it will mark all the radio buttons as **Accepted**, except the reports you rejected.
6. On the right side it will tell you how many reports on that page you will be updating to **Accepted** and the click the **Update** button. You will get the *This action cannot be undone* warning again.
7. If you have more than one page, navigate to the next page and repeat the marking as **Accepted**. You will have to change the **LOV** back to *Apply Status to All on Page* and then back to **Accepted** before the **Update** button will become available again. Continue this until you have marked all reports on all pages as accepted.

8. Once you have all the reports marked as either **Rejected** or **Accepted**, click on the **Accept and Finalize** button.
9. When the confirmation window appears, confirm you are sure.



## Glossary

A list of definitions for terms and abbreviations associated with Caliber products follows. All terms included here are not necessarily found in the *Caliber Online RMS User Guide* or the *Caliber Online RMS Administrator Guide*.

**9-1-1 or 911**— A three-digit telephone number used to report an emergency requiring response by a public safety agency (from *NENA Master Glossary of 9-1-1 Terminology*)

**911 service area** — The geographic area to which the government has granted authority to provide 911 service

**911 system** — A telephone system that automatically connects a person dialing “911” to an established PSAP through traditional telephone service facilities

**abandoned call** — A call placed to 911 in which the caller disconnects before the call can be answered by the PSAP attendant

**access line** — The connection between a customer premises network interface and the local carrier that provides access to the public switched telephone network

**accident reports** — Report category that enables sorting and viewing of accident query and accident state reports

**active window** — Indicated by a blue title bar, a window with which a user can interact

**add-ons** — Agency-defined field used to customize RMS for specific local needs,

**AFIS** — Automated Fingerprint Identification System (US FBI)

**AFR** — Abbreviation for *Automated Field Reporting*

**alarm** — Any notification made to an emergency agency that a situation exists or may exist and requires a response. An alarm can be generated via an electronic alarm system, telephone, radio, word-of-mouth, and so forth.

**alert** — A message, error, or notification of a situation (incoming calls, timer alerts, mail messages, and so forth) that may require immediate attention

**ALI Database** — Alternative name for DMS (Database Management System)

**ALIDBS** — Abbreviation for ALI Database

**alias** — A name, other than that recorded on an individual's birth certificate, by which the individual may be known

**alternate routing** — The routing of a 911 call or message over a designated substitute route when the primary 911 lines are unavailable for immediate use

**Amber Alert** — Broadcast system for *America's Missing: Broadcast Emergency Response*, Amber Alerts are immediate, up-to-date information to aid in the safe recovery of a missing child. Amber Alerts are dispatched to law enforcement, the media, and the public.

**ANI/ALI** — Abbreviation for *Automatic Name/Location Information/Identifier* or *Identification*

**AOC** — Abbreviation for *Authority Operation Center*

**API** — Abbreviation for application programming interface

**Application** — Generic term for a program or system that handles a specific business function

**Application Programming Interface (API)** — An interface used by programmers to write interfaces between their system and another vendor's system, thereby simultaneously integrating multiple systems

**Application Software** — A complete, self-contained program that can perform work for a user. This is in contrast to system software such as an operating system, server processes, and libraries that exist in support of application software.

**AREA** — Patrol Area/Zones/Beats

**area of fire origin** — The specific location where a fire started. May be a room, a portion of a room, a vehicle, a portion of a vehicle, or an open area devoted to a specific use. Every fire has an area of fire origin. (From NFIRS 5.0 Ref. Guide)

**arrival time** — The time at which a 911 call is received (if it generates an incident record) or at which an incident is created (if the call generates a manually-created incident)

**arrived** — Status of a unit indicating that it is assigned to respond to an incident and has arrived at the location specified on the incident record

**assigned unit** — A unit that is assigned (dispatched, en route, arrived, and so forth) to an incident. Some systems may be configured to consider units designated as busy (such as out for food, out for fuel, or at the station) as assigned.

**Assigned Units Window** — A CAD window that displays all units assigned to an incident. Some systems may be configured to consider units designated as busy (such as out for food, out for fuel, or at the station) as assigned.

**Attendant Window** — A CAD window that displays alerts to inform users of events or incidents that may require immediate attention

**audit trail** — Automated system records that show if database/fields have been changed, what changes were made, who made them, and when

**automatic** — When applied to fire protection devices, a device or system providing an emergency function without human intervention

**automatic location identifier** — Automatic PSAP display of a caller's telephone number, the phone location, and any additional emergency services information. If phone number is also included, it may be called ANI-ALI.

**automatic number identification** — Telephone number associated with the access line from which a 911 call originates

**automatic vehicle locator** — A product that allows a client to receive Global Positioning Satellite (GPS) coordinates, locating a client unit's position

**available unit** — A response unit not currently assigned to an incident

**Available Units Window** — A CAD/WebCAD window that displays all units (individuals, stations, and/or cars) not currently assigned to an incident. Some systems may be configured to consider units designated as busy (out for food, out for fuel, at the station, etc.) as assigned.

**AVL** — Abbreviation for *Automatic Vehicle Location*

**B&E** — Abbreviation for *breaking and entering*

**bitmap** — A picture representation that displays on the screen instead of text or numeric characters

**BMP** — File extension for bitmap, an image format commonly used on the web and in web applications

**BOLO** — Abbreviation for *Be on the Lookout*

**building** — A structure enclosed with walls and a roof and having a defined height (from NFIRS 5.0 Reference Guide)

**busy** — Status of a unit indicating that it is not assigned to an incident but is unavailable or may be slow to respond due to its current activities. Busy units include units

that are out for food, out for service, at the station, and so forth. Some systems may be configured to consider units designated “busy” as assigned.

**CAD** — Abbreviation for *Computer Aided Dispatch*

**call** — An incident phoned into a police, fire, or EMS dispatch center

**Call Detail Recording** — Process of providing a written record, by telephone number, of all 911 calls received by a PSAP

**Call Number Sequence** — Sequence numbers in CAD to track and record CAD calls

**Call Relay Method** — Process by which a 911 call is answered at the PSAP and the call taker relays the information to the appropriate public or private safety agency for further action

**Call Taker** — The person in an agency that receives a call for an incident. This person may or may not be a dispatcher.

**CFS** — Abbreviation for *calls for service*

**Caliber CAD** — Caliber’s CAD Solution

**Call Transfer Method** — Process by which the PSAP call taker determines the appropriate responding agency and transfers the 911 caller to that agency

**casualty (fire)** — A person who is injured or killed at the scene of a fire (from NFIRS 5.0 Reference Guide)

**CATP** — Abbreviation for *customer acceptance test plan*

**charge** — An accusation of wrongdoing, particularly an official statement that accuses someone of committing a crime

**check box** — An interface icon that when clicked turns an option *on (checked)* or *off (empty)*. When two or more checkboxes are offered as selections, the user may check as many choices as are applicable (unlike radio button selections, where the user can only select one option).

**CID** — Abbreviation for *Criminal Investigation Division*

**CIR** — Abbreviation for *Criminal Incident Report*

**citation** — A writ or ticket for a person to appear in court on a specific date to respond to a charge of breaking the law

**citation reports** — Report category that enables sorting and viewing the following report types: Charges by Person, Court Schedule, Ticket Inventory, and Officer Activity



**civil process reports** — Report category that enables sorting and viewing the following report types: Civil Process by Sector, Court Schedule, Payments Received, and Papers by IV-D

**civilian fire casualty** — Any non-fire service casualty who is injured or killed at the scene of a fire (from NFIRS 5.0 Reference Guide)

**CIS** — Abbreviation for *Criminal Information System*, a Caliber state switch interface product. CIS has also been referred to as *Javelin*. No product queries NCIC directly. NCIC queries are a result of a properly formatted query to a state switch.

**CJS** — Abbreviation for *Criminal Justice Information System*

**class** — A type (Fire, Law, EMS) of incident or a type of responder

**class group** — The unit associated with an incident. The class group is a subset of the class.

**CLR** — Abbreviation for *clear*, a status code

**COC** — Abbreviation for *Chain of Custody*

**combustible** — A material that will release heat energy on burning (from NFIRS 5.0 Reference Guide)

**complaint type** — Complaint types convey more than just a description of the complaint. Each type has an associated priority, class, ten code, and responding departments. Your agency should determine the information for each complaint type and enter them into the system.

**Computer Aided Dispatch (CAD)** — Electronic dispatching system used to manage an agency's communications center

**computer hardware** — Devices capable of accepting and storing computer data, executing a system sequence of operations on computer data, or producing control outputs, including the computer, monitor, keyboard, printer, cabling, and other peripherals.

**Computer Telephony Integration** — Also called computer–telephone integration or CTI, is a common name for any technology that allows interactions on a telephone and a computer to be integrated or coordinated. The term is predominantly used to describe desktop-based interaction for helping users be more efficient, though it can also refer to server-based functionality such as automatic call routing.

**configuration** — The functional and/or physical characteristics and interrelationships of project hardware and software

**COTS** — Abbreviation for *Commercial off the Shelf*

**Criminal Justice Information System** — A division of the FBI that has the mission of reducing terrorist and criminal activities by maximizing the ability to provide timely and relevant criminal justice information to the FBI and to qualified law enforcement, criminal justice, civilian, academic, employment, and licensing agencies concerning individuals, stolen property, criminal organizations and activities, and other law enforcement related data. Each state has its own CJS division. (*from CJS Web site mission statement*)

**CS** — Abbreviation for *CAD Station*

**CTI** — Abbreviation for *Computer Telephony Integration*

**daily files** — Daily records update file received by PSAPs from telephone companies. Contains any changes made to subscribers, subscriber phone numbers, or subscriber addresses.

**data** — Numbers, text, graphics, images, and sound stored in a form that can be used by a computer

**data integration server** — An XML-based communications server that allows almost instant integration and use of any new data source

**DBF** — File extension for Data Base File, the dBase file format, used with SHP (see SHP)

**data-sharing software** — Systems such as NCIC Client that enable information to be sent and received from a single workstation to other workstations, databases and agencies elsewhere

**default routing** — The capability to route a 911 call to a designated (default) PSAP when the incoming call cannot be selectively routed due to ANI failure or other causes

**DEM** — Abbreviation for *Digital Elevation Model*

**department** — A specific segment of a responding agency, such as any city police department, any county sheriff, and any fire district department

**design** — Tasks associated with specifying and sketching the features and functions of a new application prior to coding

**DGN** — File extension - DesiGN file, the Microstation drawing format

**DIG** — Abbreviation for *Digital Information Gateway*

**DIS** — Abbreviation for *Data Integration Server*

**dispatch center** — The location from which a public or private safety agency's mobile units are dispatched.

**dispatch time** — Present duration (in minutes) in which the user must dispatch a unit to an incident before a supervisor receives an alert indicating that the incident is awaiting assignment

**dispatched** — Status of a unit that is assigned to respond to an incident

**dispatcher** — The person in an agency that enters a call for an incident into the CAD system. This person may or may not be a call taker.

**disposition** — The final outcome of a CAD incident

**dissemination** — Information concerning property or court dockets that is released to individuals involved in the case

**DMV** — Abbreviation for *Department of Motor Vehicles*

**DNR** — Abbreviation for *Department of Natural Resources*

**DOB** — Abbreviation for *Date of Birth*

**DOT** — Abbreviation for *Department of Transportation*

**DRG** — Abbreviation for *Digital Raster Graphic*

**drop-down selection menu** — A list of selections that displays when a down arrow on an input field is clicked

**DSP** — Abbreviation for *Dispatch*, a status code

**DWG** — File extension - DraWinG file, the AutoCad drawing format

**DXF** — File extension - Drawing eXchange Format, an AutoCad export file

**E 911** (enhanced 911) — An emergency telephone system that includes network switching, database and CPE elements that can provide selective routing, selective transfer, fixed transfer, Automatic Location Identification (ALI), and Automatic Number Identification (ANI)

**elapsed time** — The duration since the previous contact time. Once a unit is assigned, the elapsed time indicates the time that has passed since the AGN STAT time.

**EMD** — Abbreviation for *Emergency Medical Dispatch*

**emergency call** — A telephone request for service which requires immediate action to prevent loss of life, reduce bodily injury, prevent or reduce loss of property, and other emergency situations as defined by local policy

**Emergency Medical Dispatch** — Critical medical advice offered by specially trained 911 call answering personnel. Advice follows approved protocols, given in logical sequence, for such conditions as heart attacks, choking, and child birth. Protocols are administered by phone until the arrival of emergency medical personnel on the scene.

**Emergency Service Number** — A three- to five-digit number that represents a unique combination of emergency services agencies (Law, Fire, EMS) designated to serve a specific range of locations within a geographical area. ESNs are set up by the telephone company in conjunction with subscriber input and transmitted along with E911 data. ESNs are not always available in the E911 ALI feed.

**Emergency Service Zone** — A geographical territory consisting of a specific combination of law enforcement, fire, and EMS coverage areas

**EMS** — Abbreviation for *Emergency Medical Service*

**EMS Zone** — Also called *Run Zone*, a specific area by which EMS responsibilities are defined

**En Route** — Status of a unit indicating that it is assigned to respond to an incident and is proceeding to the location specified on the incident record

**ENR** — Abbreviation for *Enroute*, a status code

**environment** — The set of tools and the physical surroundings in which software is developed, tested, and/or deployed

**ESN** — Abbreviation for emergency service number

**ESRI** — Abbreviation for Environmental Systems Research Institute (3rd party supplier of GIS and database software)

**evacuation route** — A route for a specific geographic area that dispatchers can use to instruct citizens in case of an evacuation

**event code** — Unique alphanumeric code that identifies the circumstance or occurrence that resulted in a call for help. Event codes may differ from one agency to another and are established by your system administrator.

**exposure** — A fire incident that results from a single igniting event. For record-keeping purposes, the initial fire incident (primary ignition event) is "Exposure 1" and each subsequent fire resulting from that initial exposure is sequentially numbered.

**exposure** — (fire) A fire in a building, structure, vehicle, or outside property resulting from a fire outside that building, structure, vehicle or outside property (from NFIRS 5.0 Reference Guide)

**expungement** — Permanently deletes chosen records from the RMS tables; there is no audit trail or logging of this activity.

**Extensible Markup Language** — (XML) A markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable. It is a highly compressible, standard markup language that defines a way of transmitting and representing data used for applications and the internet.

**fatality** — An injury that is fatal or becomes fatal within one year of the incident (from NFIRS 5.0 Reference Guide)

**FDID** — (Fire Department ID) A unique, five-character identifier assigned by the state to identify a particular fire department within that state (From NFIRS 5.0 Reference Guide)

**field** — An area on the screen into which you can enter information into a system

**Field Reporting** — Caliber applications used for wireless (via Mobile) reporting of various documents, such as incident reports, traffic tickets, and accident reports. Also functions as a stand-alone that can be accessed via a LAN workstation or notebook computer. All information entered into a report is reviewed by a supervisor and fed into a database.

**fire casualty** — A person working for an fire department who is injured or killed at the scene of a fire (From NFIRS 5.0 Reference Guide)

**fire fatality** — An injury that is fatal or becomes fatal within one year of a fire incident (From NFIRS 5.0 Reference Guide)

**fire plan database** — The fire plan database contains detailed information about a specific site for use in a fire or other emergencies. This information will help your agency respond quickly and efficiently to situations that are dangerous or have the potential to become dangerous. Using a fire plan, you can create and store address-specific information that includes data crucial to those responding to a fire.

**fire (run) zone** — A specific area by which fire responsibilities are defined.

**footprint** — A specific geographical area covered by a wireless cell or cell sector

**function key (F key)** — The computer keys labeled **F1** through **F12**, some of which may be assigned special functions (For example, **F8** is usually reserved for the *Exit* function in Caliber products.)

**gcpk** — file extension - geocoding package used for location calculations

**geocoding** — GIS operation to locate geographic coordinates associated with an address or point on map

**geoprocessing** — GIS operation to manipulate spatial data, including geocoding, searching, and routing

**GIS** — Abbreviation for *Geographical Information System*

**Global Positioning System** — (GPS) A space-based satellite navigation system that provides location and time information in all weather conditions, anywhere on or near the Earth where there is an unobstructed line of sight to four or more GPS satellites. The system provides critical capabilities to military, civil and commercial users around the world. Maintained by the United States government, it is freely accessible to anyone with a GPS receiver.

**gpk** — file extension - geocoding package used for route determination

**GPM** — Gallons per minute

**GPS** — Abbreviation for *Global Positioning System*

**GPS Tracker** — GPS/AVL tracking software

**group** — 1. (CAD) The unit associated with the same specific incident. The class group is a subset of the Class field. 2. (ENS) A list of call recipients that belong to the same area or community.

**GUI** — Abbreviation for *Graphical User Interface*

**hardware** — Physical equipment used to process, store, or transmit computer program data

**hazardous materials** — Any material that is an air-reactive material, flammable or combustible liquid, flammable gas, corrosive material, explosive material, organic peroxide, oxidizing material, radioactive material, toxic material, unstable material, or water reactive material; and any substance or mixture of substances that is an irritant or a strong sensitizer or that generates pressure through exposure to heat, decomposition, or other means. (From NFIRS 5.0 Ref. Guide)

**hazmat** — Abbreviation for *Hazardous Materials*

**high cross street** — A term used to indicate the next street that intersects a particular street in the direction in which that street's numbers ascend

**hot sync** — Using a third party device manager application, this allows the import and export of applications, files and data between computer servers and a desktop or laptop computer.

**html** — Abbreviation for *Hyper Text Markup Language*

**hypertext** — Text that is displayed electronically and contains links

**iamap** — File extension - Caliber map project file

**icon** — On a Windows interface, an image or button containing an image that represents various system functions

**in service** — Status of a response unit indicating that it is available for assignment. Often referred to as *On Duty*.

**inactive window** — Indicated by a gray title bar, a disabled window with which a user cannot interact because another window is selected

**incident** — An event that results in a call for help. CAD assigns an incident number to every call for help so that the call can be assigned to units as necessary. Incident records include details of the initial information given by the caller as well as details of every action the organization takes as a result of the call.

**incident number** — A unique, sequential number assigned to a specific incident record

**Incident Wizard** — An RMS feature that allows users to configure the system so that the appropriate screens automatically display upon creation of an incident record. This feature helps to ensure that all relevant known incident data is entered into RMS

**interface** — A connection between two devices or systems

**ISSI** — Abbreviation for *Individual Short Subscriber Identity*

**ISPS** — Abbreviation for *Caliber Safety Portal System*

**issue** — A problem to be solved or a decision that has not been made

**JMS** — Abbreviation for *Jail Management System*

**JPG** (jay-peg) — Abbreviation for the file extension *Joint Photographic Experts Group* which is an image format commonly used on the Web

**jurisdiction** — An overall area of responsibility. An installation could provide service for one or more jurisdictions. For example, an installation could be responsible for just one small county so it would need only one jurisdiction. Another installation could provide service for the county and the major city within that county. This installation could use two jurisdictions, one for the county, and one for the city.

**LAN** — Abbreviation for *Local Area Network*

**latitude** — The angular distance north or south of the earth's equator, measured in degrees along a meridian, as on a map or globe. Latitude lines run parallel to the equator. Values range from 0 degrees at the equator to 90 degrees at the North and South Poles. Minutes and seconds range from 0 to 59. (From *NFIRS 5.0 Ref. Guide*)

**layer** — Map (GIS) data layer that can be portrayed in map legend as an individual feature

**LEO** — Abbreviation for *Law Enforcement Officer*

**LINK** — Abbreviation for *Law Information Network of Kentucky*

**link** — Text that when clicked takes you to another page, topic, site, and so forth. Also called hyperlinks, links are typically underlined and of a different color than the surrounding text. An image can also be used as a link.

**literal** — A term used to refer to generic field names, or labels, for user-defined fields. Some RMS and JMS modules allow users to set up agency-specific fields. These fields must be assigned names (labels). Thus, a literal is a name/label that an agency assigns to a field.

**local area network** — A computer network that encompasses a discrete area, such as in a building. In a law enforcement agency, this may include Dispatch, CAD, GEO, MIS, and desktop computers.

**location** — The address at which an incident is occurring as provided by the ALI system or the caller

**login** — A process in which a user identifies and authenticates himself/ herself to a computer

**longitude** — Angular distance on the earth's surface, measured east or west from the prime meridian to the meridian passing through a position, expressed in degrees (or hours), minutes, and seconds. Longitude lines run north/south, are parallel at the equator, and converge at the North and South Poles. Values range from 0 at Greenwich, England, to 180 degrees at the International Date Line west of Hawaii. Minutes and seconds range from 0 to 59. (*From NFIRS 5.0 Ref. Guide*)

**low cross street** — A term used to indicate the next street that intersects a particular street in the direction in which that street's numbers descend

**Maps** — Map display of GIS data (raster and vector)

**marker** — Map icon/symbol used to display specific data (search results, incident, or unit location)

**Master Street Address Guide (MSAG)** — Computerized geographical file or database that consists of all streets and address ranges within the 9-1-1 system area. Key to selective routing capability of E911 systems; requires constant updating.

**MDT** — Abbreviation for *Mobile Data Terminal*

**MM** — Abbreviation for *Mile Marker*



**MNI** — Abbreviation for *Master Name Index*

**MO** — Abbreviation for *Method of Operation*

**mobile property type** — Property designed to be movable whether or not it still is (from NFIRS 5.0 Reference Guide)

**move-ups** — Move-Ups provide dispatchers with information when handling various types of calls, such as EMS. For example: When a dispatcher requests to view EMS move-ups, the system checks this database to see if the current situation matches any situations in the database. If a match is found, the instructions are displayed to the dispatcher. These instructions can indicate what station should move up a unit to provide back-up coverage. They should also include whatever information your agency normally expects a dispatcher to have access to when dealing with a particular EMS situation.

**mpk** — File extension - ESRI map package file, vector map graphic data

**MSAG** — Abbreviation for *Master Street Address Guide*

**Narrative** — Additional description or details, in free-form text, associated with an incident

**National Crime Information Computer** — NCIC is a computerized index of criminal justice information that is available to Federal, state, and local law enforcement and other criminal justice agencies, and it is operational 24 hours a day, 365 days a year. The NCIC system provides a computerized database for ready access by a criminal justice agency making an inquiry and for prompt disclosure of information in the system from other criminal justice agencies about crimes and criminals. This information assists authorized agencies in criminal justice and related law enforcement objectives, such as apprehending fugitives, locating missing persons, locating and returning stolen property, as well as in the protection of the law enforcement officers encountering the individuals described in the system.

**National Emergency Number Association** — NENA's mission it is to foster the technological advancement, availability, and implementation of a universal emergency telephone number system in the United States. In carrying out its mission, NENA promotes research, planning, training and education. The protection of human life, the preservation of property and the maintenance of general community security are among NENA's objectives.

**National Institute of Corrections** — The National Institute of Corrections (NIC) is an agency of the United States government. It is part of the United States Department of Justice, Federal Bureau of Prisons. NIC provides support programs to assist federal, state, and local corrections agencies and provides funds to support programs that are in line with its key initiatives.

**National Law Enforcement Telecommunication System** — NLETS is the International Justice and Public Safety Information Sharing Network — a state-of-the-art secure

information sharing system for state and local law enforcement agencies. It provides electronic messaging to allow information exchange between state, local, and federal agencies and support services to justice-related computer programs.

**NCIC** — Abbreviation for *National Crime Information Computer*, located in Washington, D.C.

**NENA** — Abbreviation for *National Emergency Number Association*

**NFIRS** — Abbreviation for *National Fire Incident Reporting System*

**NIC** — Abbreviation for *National Institute of Corrections*

**NLETS** — Abbreviation for *International Justice and Public Safety Network* formerly known as *National Law Enforcement Telecommunication System* (<https://www.nlets.org>)

**NOK** — Abbreviation for *Next of Kin*

**Objective Jail Classification System** — developed guidelines for assessing jail inmates' individual custody and program needs

**OCA** — Abbreviation for *Originating Case Agency*

**OCC Number** — The number of occupants at a location

**occupancy** — The specific property use of a building or portion of a building

**Off Duty** — See *Out of Service*

**officer reports** — Report category that allows access and viewing of Associated Papers and Case Assignment Records

**OJC** — Abbreviation for *Objective Jail Classification*

**OMS** — Abbreviation for *Offender Management System* which is replacing JMS

**On Duty** — See “in service”

**on-site materials** — Any significant amounts of commercial, industrial, energy, or agricultural products or materials on the property, whether or not they became involved in the fire. Note: For more information, refer to the NFIRS 5.0 Complete Reference Guide, available from [www.fema.gov/nfirs](http://www.fema.gov/nfirs).

**ORI** — Abbreviation for *Originating Agency Identifier*, a nine-digit code used by agencies on the law enforcement network

**Originating Case Agency** — A term used in RMS Case Management to refer to the first agency to respond to and/or create a report about an incident

**ORION** — Abbreviation for *Originating Agency Identifier On-line Directory*

**OS** — Abbreviation for *On Scene*, a status code

**out of service** — Status of a unit indicating that it is not assigned to an incident but is unavailable for assignment, often referred to as Off Duty

**PACE** — Abbreviation for *Pro-Active Criminal Enforcement*

**patrol area** — Geographical area of a jurisdiction that a unit works

**PCB** — Abbreviation for *product change bulletin*

**PCN** — Abbreviation for *product change notice*

**PCS** — Abbreviation for *Public Communications Supervisor*

**pending call** — A call to which no units have been assigned

**person history reports** — Report category that enable sorting and viewing of the following report types: Person Involvement, Crimes by Person, Gender and Race Profile, Arrest History Summary, Civil and Warrants by Defendant, Civil and Warrants by Plaintiff, and Sex Offender Registration

**phases** — The divisions of a software development life cycle into discrete stages (requirements, design, code, test, and so forth)

**pictometry** — Aerial image capture and display, orthogonal and oblique images (3rd party)

**place alias** — A common name for a business, landmark, or general location that a caller may use to identify a place when unsure of the exact location

**place file** — Function that cross-references a place (alias) name with a location record.

**png** — File extension - Portable Network Graphics which is a commonly used image format

**pod** — Used in JMS/OMS, this term is equivalent to cell block

**POI** — Abbreviation for *Point of Interest*

**pop-up** — A window that opens "pops up" when an option is selected or a function key is pressed. A pop-up window usually contains a menu of commands and stays on the screen only until a command is selected.

**priority** — Level of importance assigned to an incident. CAD includes the following priorities: Priority 1 - Emergency. Priority 2 - Important, but not an emergency. Priority 3 - Less important; not an emergency.

**probation** — An alternative to prison/jail in which offenders can remain in the community under court supervision

**process** — The step-by-step sequence of activities (systematic approach) that must be carried out to complete a project

**Product Change Bulletin** — A document summarizing changes (such as fixes, enhancements, and usability improvements) to a product since the last major release (for example, 10.1 to 10.2)

**Product Change Notice** — A document summarizing changes (such as fixes, enhancements, and usability improvements) to a product since the last minor release (for example, 10.1.1 to 10.1.2)

**property** — An item of value that can be FIXED on the Earth's surface, i.e., water, land, roadways, structures, buildings, or MOBILE, i.e., ships, airplanes, trains, trucks, automobiles (from NFIRS 5.0 Reference Guide)

**proximity distance** — Relative distance that determines when the symbols for two or more AVL units merge together to show up as one symbol on the GIS map

**PSAP** — Abbreviation for *Public Safety Answering Point*

**Public Safety Answering Point** — The initial answering location of a 911 call. Sometimes called a 911 center.

**Quality Assurance** — The process of tracking and oversight functions for monitoring project performance, adherence to commitments, and budget requirements

**radio button** — Interface icon with a round button shape that can be clicked to indicate a choice. A radio button operates like the buttons on a radio tuner, when a button is pressed, all other buttons are disengaged, allowing only one selection at a time.

**Records Management System** — Also known as RMS, a centralized electronic package of modules used to enter, maintain, track and manage data related to criminal incidents, evidence, cases, and so forth

**remark** — A comment or note that may be appended to a unit's log or sent to a unit's pager as an alphanumeric text message

**responding unit** — The unit currently assigned to respond to an incident

**response** — Deployment of an emergency service resource to an incident (from the NFIRS 5.0 Reference Guide)

**rich text format** — generic word processing format

**RL** — Abbreviation for *Radio Log*

**RMS** — Abbreviation for *Records Management System*

**route** — GIS function used to determine route/directions from one point on a map to another

**RTF** — Abbreviation for *rich text format*, a file extension

**run cards** — Run cards are sets of instructions for dispatchers to follow based on given situations. Each run card contains one set of instructions.

**run number** — A chronological value assigned to a recorded incident. Also called *OCA number* or *case number*.

**SBN** — A file extension used by files that store the spatial index of the features used by Maps

**SBX** — A file extension used by files that store the spatial index of the features used by Maps

**SDE** — Abbreviation for *Spatial Database Engine*

**SDTS** — Abbreviation for *Spatial Data Transfer Standard*

**scope** — The magnitude of the effort required to complete a project

**sealing** — A means to flag records as sealed. This activity produces no audit trail nor is it logged. Typically, general users do not have access to sealed records, but with appropriate permissions set up in File Maintenance, a user may be allowed access.

**search reports** — A report category that can be used to sort vehicle, charge, person, and property records

**sequence number** — Number identifying a row in the System Monitor table. Clicking on the sequence number displays the incident details. The sequence number is not permanently associated with the incident record displayed in the row. In other words, an incident may be moved to another row and consequently associated with another sequence number as incidents are added to or removed from the table.

**session time out** — Inactive status of an application that occurs when a page is left open and untouched for a customer defined / configured duration (example: 30 minutes). The User Login page displays at session time out, prompting the user to log in again.

**sid** — File extension - MrSid georeferenced raster graphic file, aerial imagery map data

**SME** — Abbreviation for *Subject Matter Expert*

**Spatial Database Engine** — Helps manage spatial data to provide a quicker retrieval of that data from database engines such as Oracle, SQLSever, and Informix

**Spatial Data Transfer Standard** — A standard used to describe earth-referenced spatial data. It was designed to easily transfer and use spatial data on different computer platforms.

**SOD** — Abbreviation for *Special Operations Division*

**solvability factors** — Factors that influence whether crimes are more or less likely to be solved. Agencies assign relative weights to these factors. These weights are then used to assess the solvability of a case to determine assignment of investigative resources.

**soundex** — A coded name index based on the way a word sounds rather than the way it is spelled. Names that sound the same, but are spelled differently, like SMITH and SMYTH have the same code and are filed together. The soundex coding system allows you to find a surname even though it may have been recorded under various spellings.

**SOP** — Abbreviation for *Standard Operating Procedures*

**SQL** — Structured Query Language

**SSM** — System Status Monitor

**specifications** — General term for the wide variety of paper-based descriptions of a program or system

**stacking** — This allows a user to hold/stack an incident for a certain unit. Example: If a unit is on an incident and a second incident is created in that unit's zone/beat, the user can hold/stack the second incident until the unit clears the first incident.

**station** — A particular fire station within a fire department. If used, station IDs are assigned locally.

**teleco** — Abbreviation for *telephone company*

**telecommunicator** — The person in an agency that monitors phone activity and talks with the callers dialing 911. This person may or may not be a dispatcher.

**testing** — The set of defect removal tasks that include execution of all, or part, of an application on a computer

**TMD** — Abbreviation for Tactical Map Display

**tpk** — File extension - ESRI tile package file, raster map graphic data

**TS** — Abbreviation for *Traffic Stop*

**UCR** — Abbreviation for *Uniform Crime Reporting*

**UID** — Abbreviation for *Unit ID*

**Uniform Crime Reporting** — A collective effort on the part of city, county, state, tribal, and federal law enforcement agencies to present a nationwide view of crime. Agencies throughout the country participating in the UCR program provide summarized reports on offenses known to law enforcement and reports on persons arrested. (From the *Introduction of the U.S. Department of Justice's [FBI] Uniform Crime Reporting Handbook – 2004*)

**Uniform Crime Reports (UCR)** — An FBI program that collects and disseminates data on arrests and crimes

**unit** — An entity dispatched using a single code. A unit might be one officer, a patrol car, an EMS station, or even a fire station.

**use of force** — A classification of an incident, indicating that use of force was required

**vacant** — Not occupied or put to use; with no furnishings or equipment present

**validation** — Process that ensures that the entered data is correct

**VIN** — Abbreviation for *Vehicle Identification Number*

**VINE** — Victim Information and Notification Everyday. VINE is a system that allows crime victims across the U.S. to obtain up-to-date information about criminal cases and the custody status of offenders at any time over the telephone, through the Web, or by e-mail.

**warrant** — A judicial writ authorizing an officer to make a search, seizure, or arrest, or to execute a judgment

**warrant reports** — A report category of that enables sorting and viewing of the following types of reports: Warrants Served by Officer, Warrants to Expire, Served by Officer/Date Range, Status Snapshot by Date Range, Warrants by Dept/Status, Warrants by Process Dept, and City/County Warrant Report

**wildcard character** — A character, usually an asterisk, that is used to take the place of other unknown characters to perform searches. For example, to search for a person with the name *Jansen* or *Jensen* you would use “j\*nsen” to find all occurrences of both.

**wildcard search** — The Master Vehicle Index (MVI) and Master Name Index (MNI) modules allow for wildcard searches to broaden search terms and find information. In RMS, the wildcard symbol is an asterisk (\*). This symbol is used to search the indices for possible matches to, or hits on, data entries.

**wildland** — An unsettled, uncultivated region or minimal to no development, covered with timber, woodland, brush, or grass. (From NFIRS 5.0 Ref. Guide)

**window** — A section of a screen that contains an application or part of an application

**wrecker** — A vehicle that is used in recovering or removing a wreck, especially a truck with a hoist and towing apparatus used in towing disabled or wrecked vehicles

**XML** — File extension and Abbreviation for *Extensible Markup Language*. XML is a highly compressible, standard generalized markup language to define a way of transmitting and representing data. Designed to transmit data used for applications and the internet.

**zone** — An area to which dispatchers are assigned to dispatch responsibilities; may include an entire city or county or only certain regions, depending on zoning, which is based on the agency's call activity and the agency size



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