



## Online RMS

11.6

Administrator Guide

April 2021



# Caliber Public Safety

## Online RMS 11.6

### Administrator Guide

#### April 2021

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- Duration of the problem

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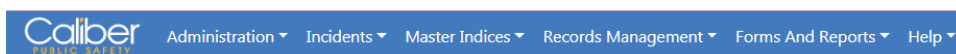
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# Chapter 1. Introduction

## Access Administration

Use the following procedure to access Online RMS Administration.

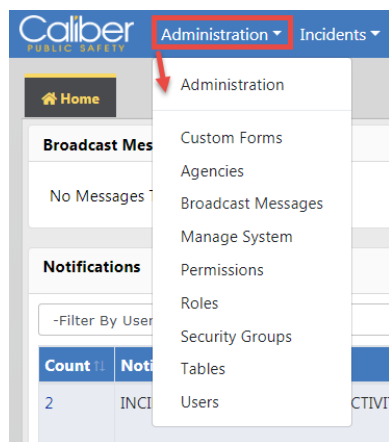
1. Open the RMS application to the *Homepage* to display the Navigation bar as shown.



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

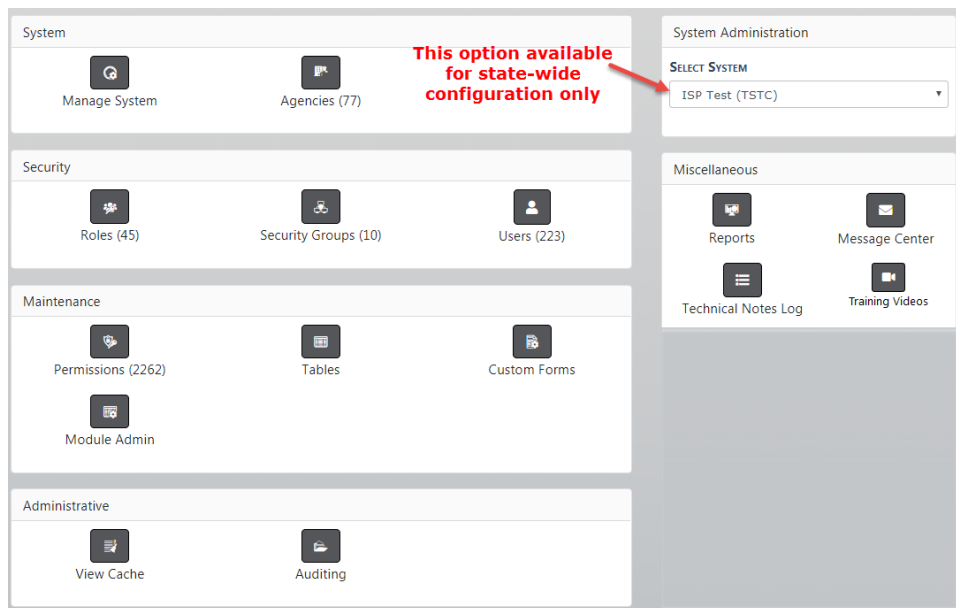
2. Perform one of the following steps:

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



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

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



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

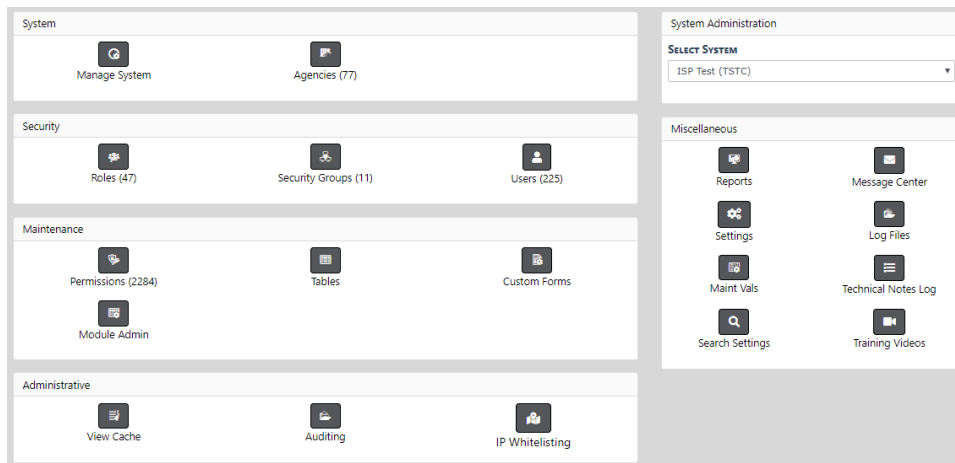
3. Click the appropriate icon to open the portion of the program in which you want to work.

## Levels of Administration

### Company Level

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



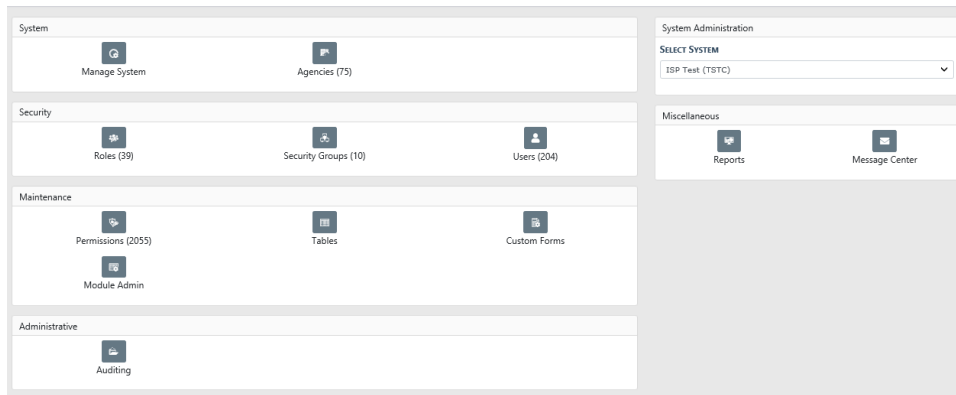


For agencies having security requirements to not allow access to Caliber Online RMS outside of approved networks, Caliber Public Safety personnel can define the following settings via the **IP Whitelisting** icon under the *Administrative* section:

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

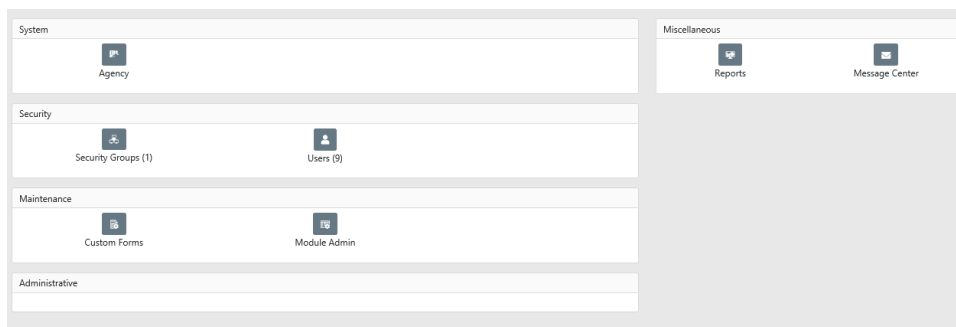
## Schema Level

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



## Agency Level

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



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

## Roles and Permissions

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

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

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

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

## 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.

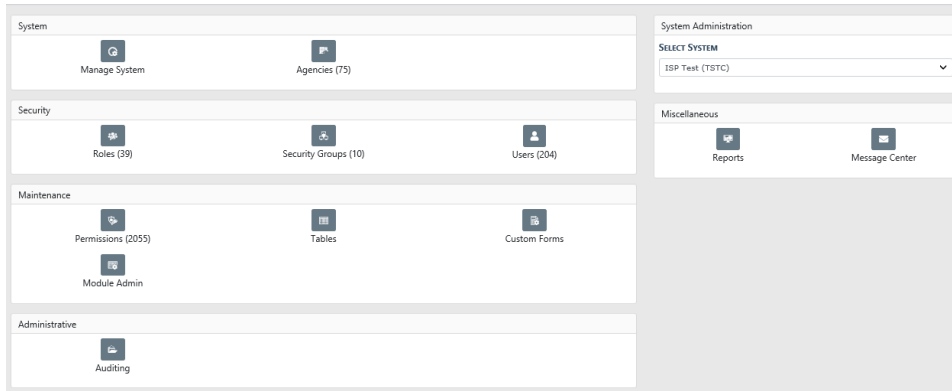
## User Account Index Security Levels

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

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

## Chapter 2. System Administration

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



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

### System Information

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

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

The screenshot shows the Caliber Public Safety System Administration interface. The top navigation bar includes links for Administration, Incidents, Master Indices, Records Management, Forms And Reports, and Help. The user is logged in as '98 / 0'. The 'System Information' tab is selected and highlighted with a red box. The form contains the following sections:

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

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

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

## Quick Links

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

1. If needed, click the **Quick Links** tab to bring it to the front as shown.

Go Back

System Information **IPSC Test (TSTC) - Quick Links**

**Internal Quick Links** [Add Internal Quick Links](#)

Quick Link	Category	Agency	Actions
Address	Default Links		
Approve Incident Report	Reports	District 42, Versailles	
Broadcast Messages	Default Links	District 21, Toll Road - SC	
Create Field Arrest	RMS	District 16, Peru - GA	
Custom Forms Search	RMS	District 16, Peru - GA	
Evidence Management Module	RMS	State of Mark	
Field Arrests	Default Links	District 21, Toll Road - SC	
INVENTORY	RMS		
Person Search	Default Links	District 16, Peru - GA	
Tow/Impound	RMS	District 34, Jasper	
Transfer	Default Links	District 42, Versailles	
View CAD Calls	RMS		
View Incident Report	RMS	District 16, Peru - GA	
x	Master Indices	All Other	

**External Quick Links** [Add External Quick Links](#)

Quick Link	Agency	Actions
Approve Incident Report - External	District 42, Versailles	
IPSC Home Page	District 21, Toll Road - SC	
Indiana General Assembly	District 21, Toll Road - SC	
State Statutes		

Go Back

- In the **Internal Quick Link** grid, locate the quick link you want to edit.
- In the **Actions** column, click in the same row as the link you want to change to display the *Edit Internal Quick Links* window.

Internal Quick Link

**QUICK LINK NAME**

Approve Incident Report

**LINK**

Approve Incident Report

**CATEGORY**

Reports

**AGENCY**

District 42, Versailles

Cancel Save

- Select and type changes in the fields as needed.
- Click **Save** to save the changes and display the change in the **Internal Quick Links** grid.





# Chapter 3. Attachments

## Attachments Overview

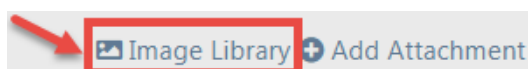
Attachments are files that are accessed by other programs, such as a picture, document, spreadsheet, etc. These files are uploaded and saved to Online RMS modules that support attachments. For example, mugshot attachments could be uploaded and saved to person records, or mechanic hand-written quotes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

Attachments appear in a grid, or columnar format.

Attachments <span>Image Library Add Attachment</span>				
Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1		09/25/2012	

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

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



## Add Attachments

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

Attachments <span>Image Library Add Attachment</span>				
Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1		09/25/2012	

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

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

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

The screenshot shows the 'Add Person Attachments' form. At the top right is a 'Go Back' button. Below the title is a '▼ Instructions' button, with a red arrow pointing to it and the text 'Click to display instructions'. The instructions section contains the following text: 'You may use this to upload pdf,jpg,jpeg,bmp,png,doc,docx,xls,xlsx,txt,ppt,vsf,pptx files. Files must be no greater than 10 megabytes.', 'You may upload a maximum of 10 files at once.', and 'Once you have uploaded the files, you will be able to add descriptions / edit file names / etc..'. A 'Start Upload' button is located to the right of the instructions. Below the instructions is a large white box for the file queue. Inside this box, the text 'Drop Files Here, Or Click Here to Add Files' is centered. To the left of this text is 'Option 1: Drag and drop files into this box'. To the right is 'Option 2: Click on the word Here to add files', with a red arrow pointing to the word 'Here' in the main instruction text.

- 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.

This screenshot shows the same 'Add Person Attachments' form, but now the file queue area contains a visual representation of a file queue. It shows a stack of files with a 'Remove file' button below them. A red arrow points to the 'Remove file' button with the text 'Click to remove the file in the queue'. The 'Start Upload' button remains visible to the right of the instructions section.

**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 two columns. The left column has a 'TYPE OF ATTACHMENT' dropdown set to 'Image', a 'FILE NAME' field containing 'AddArrestChargeCode.png', and a 'DESCRIPTION' text area. The right column has a 'KEYWORD' dropdown set to 'Image' and a 'DATE OF INFO' field containing '03/19/2019'. 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 per file can be uploaded at one time. Agencies may purchase a Rich Media Package that allows file uploads with a max of 50 MB per file and rich media file types.

## Edit Attachments

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

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

The screenshot shows a table titled 'Attachments' with columns: Keyword, File Name, Description, Date of Info, and Actions. The first row has the values: 'Mugshot - Front', '383\_1', an empty description, '09/25/2012', and an Actions column with three icons. Red arrows point from the text 'Edit' to the first icon, 'Download' to the second icon, and 'Delete' to the third icon.

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

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

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

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

**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

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

## Delete Attachments

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

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

Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1		09/25/2012	<a href="#">Edit</a> <a href="#">Download</a> <a href="#">Delete</a>

**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




No

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				
		<a href="#">Edit</a>		<a href="#">Image Library</a> <a href="#">Add Attachment</a>
Keyword	File Name	Description	Date of Info	Actions
 Mugshot - Front	383_1		09/25/2012	  

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



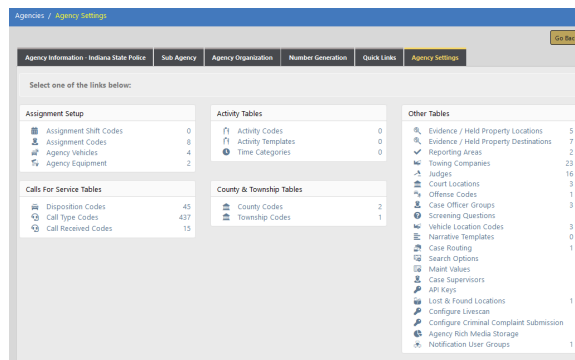
# Chapter 4. Manage Agencies

## Manage Agencies Overview

To access this option from the Online RMS *Home* page, perform one of the following tasks:

- Click on the Administration icon/label to display the drop-down menu and select the **Agencies** option.
- Click the Administration icon/label to open the *Administration Home* page and click the **Agencies** icon.

For agency administrators, the *Manage Agencies* page displays as shown here.



- Click **Add Agency** on the top right of the page to open an empty *Agency Profile* page where you can complete fields as needed to add another agency to your schema. Refer to "Add Agency" on page 74 for more information.
- Click **[edit]** next to an agency name to open the existing *Agency Profile*. Refer to "Agency Profile" below for details.

## Agency Profile

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

The screenshot shows the 'Agency Profile' page with the 'Agency Information' tab selected. The page has a blue header with 'Agencies / Agency Profile' and two buttons: 'Go Back' and 'Update'. Below the header is a tab bar with six tabs: 'Agency Information - Ang Police Department' (active), 'Sub Agency', 'Agency Organization', 'Number Generation', 'Quick Links', and 'Agency Settings'. The main content area is divided into two sections: 'Agency Information' and 'Agency Administrators'. The 'Agency Information' section contains several input fields: 'AGENCY INTERNAL CODE' (ANGPD), 'AGENCY DISPLAY CODE' (ANGPD), 'AGENCY CODE DISPLAY TEXT' (Ang Police Department), 'AGENCY TYPE' (Police Agency), 'TIME ZONE' ((GMT-06:00) Central Time(US and Canada)), 'ORI NUMBER', 'WEBSITE', 'PHONE' (415-888-9999), 'FAX', and 'INCIDENT REPORT HEADER DISPLAY'. The 'Agency Administrators' section has an 'Add User' button and a dropdown menu with '--Select User--' and an 'Add' button.

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

## Agency Information Tab

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

This screenshot is identical to the one above, showing the 'Agency Profile' page with the 'Agency Information' tab selected. It displays the same tabs, input fields, and buttons as the previous image.


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



## Agency Information

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

## Agency Administrators

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

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

## Agency User Subscriptions

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

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

Agency User Subscriptions				<a href="#">Manage Subscription Counts</a>
Subscription Type	Allocated	Actual	Difference	
Full Time	10	0	10	
Part Time	10	0	10	
Reserve	10	0	10	
Full Time Non-Sworn	10	0	10	
Part Time Non-Sworn	10	0	10	
View Only	10	0	10	
TOTAL	60	0	60	

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

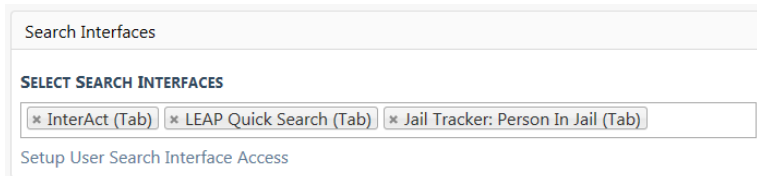
You have reached the maximum number of active named user accounts for your Organization. Please contact support to add additional user accounts or deactivate an existing user account.

## Features

The section enables Online RMS personnel to enable the features.

## Search Interfaces

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

The screenshot shows a web interface titled "Search Interfaces". Below the title is a section labeled "SELECT SEARCH INTERFACES". Inside this section, there are three buttons: "x InterAct (Tab)", "x LEAP Quick Search (Tab)", and "x Jail Tracker: Person In Jail (Tab)". Below the buttons, there is a link labeled "Setup User Search Interface Access".

## Attachment Interfaces

## Jail Tracker - Facilities to Search

## State Submissions Configuration

## Miscellaneous

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

## NIBR City Indicator

## Address Information

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

## Agency Logo

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

## Sub Agency Tab

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

Use the following procedure to add a sub agency.

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

The screenshot shows the 'Sub Agencies' tab selected in the 'Agency Profile' page. The breadcrumb trail is 'Agencies / Sub Agencies'. The 'Go Back' button is in the top right. The tab bar includes 'Agency Information - Ang Police Department', 'Sub Agency' (active), 'Agency Organization', 'Number Generation', 'Quick Links', and 'Agency Settings'. Below the tabs, there is a 'Show 10 entries' dropdown, a 'Search:' field, and an 'Add Sub Agency' link. A table with columns 'Sub Agency', 'Sub Agency Type', and 'Actions' is shown, but it contains no data. The footer indicates 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' buttons.

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

The 'Add Sub Agency' window is shown. It has a title bar 'Add Sub Agency'. Below it, there are two dropdown menus: 'SUB AGENCY' with 'ANGTESTAGENCY' selected, and 'TYPE' with '- Select -' selected. At the bottom right, there are 'Cancel' and 'Save' buttons.

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

## Agency Organization Tab

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

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

**Current Org Settings**

LEVEL	ROOT
ID	USERS / ASSIGNMENTS
PARENT	Is GEOGRAPHIC
RESTRICT SELF ASSIGNMENT	ACCESS RESTRICTED
RESTRICT CASE SHARING	

**Edit Org Settings**

LEVEL	ROOT
ID	USERS / ASSIGNMENTS
PARENT	Is GEOGRAPHIC
RESTRICT SELF ASSIGNMENT	ACCESS RESTRICTED
RESTRICT CASE SHARING	

**Display Header**

Use this field to specify a unique display header that may appear on reports and screens for this organization unit. If this is omitted, a Display Header from one of this organization's parents may be used, if it is included, this display header may be inherited by this organization's children organization units.

**CURRENT DISPLAY HEADER (THIS ORG UNIT)**

**ACTIVE DISPLAY HEADER (THIS ORG UNIT OR A PARENT)**  
Ang Police Department

**Edit Display Header**

Ang Police Department

**Route Settings**

Edit Route Settings

Go Back | Update

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

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

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

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

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

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

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

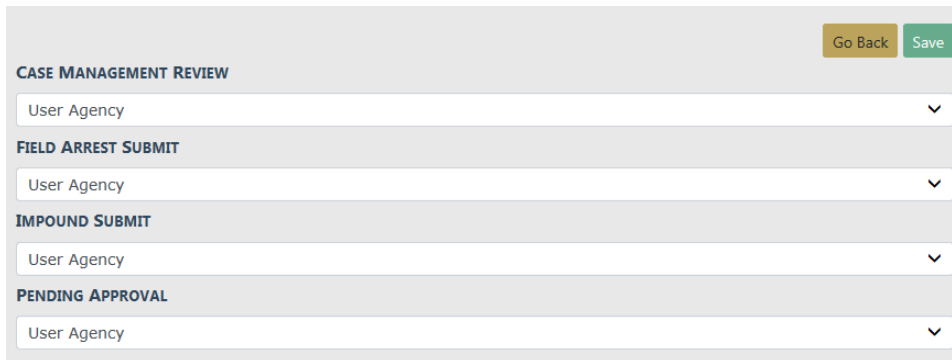
**Current Display Header (This Org Unit)**

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

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

### Route Settings:

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



The screenshot shows a web interface for 'Agency Route Settings'. At the top right, there are two buttons: 'Go Back' (yellow) and 'Save' (green). Below these are four sections, each with a title and a dropdown menu:

- CASE MANAGEMENT REVIEW**: Dropdown menu set to 'User Agency'.
- FIELD ARREST SUBMIT**: Dropdown menu set to 'User Agency'.
- IMPOUND SUBMIT**: Dropdown menu set to 'User Agency'.
- PENDING APPROVAL**: Dropdown menu set to 'User Agency'.

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

## Number Generation Tab

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

### Add Number Generation

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

For more information about *Community Reporting* public forms, refer to “Community Reporting with Custom Forms” on page 270.

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

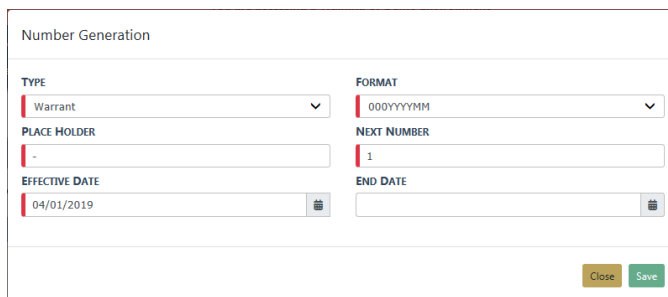
1. On the *Administrative Home* page, click the **Agencies** icon to display the *Manage Agencies* page.

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



Type	Format	Next Number	Placeholder	Effective Date	End Date	Actions
Dispatch #	YYYY00000000	1	-	1/1/11 12:00:00 AM		[edit] [delete]
Dispatch #	YYYY00000000	1	-	1/1/11 12:00:00 AM		[edit] [delete]
Evidence Audit Report #	YYYYIR000	1	-	1/1/11 12:00:00 AM		[edit] [delete]
Evidence Audit Report #	YYYYIR000	1	-	1/1/11 12:00:00 AM		[edit] [delete]
Incident	YYYY00000000	1	-	1/1/11 12:00:00 AM		[edit] [delete]
Incident	YYYY00000000	1	-	1/1/11 12:00:00 AM		[edit] [delete]
LEA Case Number	0000YY	1	-	1/1/11 12:00:00 AM		[edit] [delete]
Officer Daily Log #	YYMMIR0000	1	-	1/1/11 12:00:00 AM		[edit] [delete]

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



Number Generation

TYPE: Warrant

FORMAT: 000YYYYMM

PLACE HOLDER: -

NEXT NUMBER: 1

EFFECTIVE DATE: 04/01/2019

END DATE:

Close Save

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

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

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

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

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

7. Enter the **Place Holder**.

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

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

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

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

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

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

Use the following procedure to edit a number generation.

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

Go Back

Agency Information - Olive Branch Police Department		Sub Agency	Agency Organization	Number Generation	Quick Links	Agency Settings
---	--	------------	---------------------	-------------------	-------------	-----------------

☐ Indicates # is currently in use    ☐ Hide Expired

Add Number Generation

Type	Format	Next Number	Placeholder	Effective Date	End Date	Actions
Dispatch #	YYYY00000000	1	-	1/1/11 12:00:00 AM		
Dispatch #	YYYY00000000	1	-	1/1/11 12:00:00 AM		
Evidence Audit Report #	YYYYIR000	1	-	1/1/11 12:00:00 AM		
Evidence Audit Report #	YYYYIR000	1	-	1/1/11 12:00:00 AM		
Incident	YYYY00000000	1	-	1/1/11 12:00:00 AM		
Incident	YYYY00000000	1	-	1/1/11 12:00:00 AM		
LEA Case Number	0000YY	1	-	1/1/11 12:00:00 AM		
Officer Daily Log #	YYMMIR0000	1	-	1/1/11 12:00:00 AM		

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

Number Generation

TYPE

Warrant

PLACE HOLDER

-

EFFECTIVE DATE

04/01/2019

FORMAT

000YYYYMM

NEXT NUMBER

1

END DATE

Close

Save


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

## Delete Number Generation

Use the following procedure to delete a number generation record.

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



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

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

## Quick Links Tab

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



Agencies / Quick Links Go Back

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

**County Internal Links**

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

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

**County External Links**

Quick Link	Agency
State Statutes	


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

Go Back Update

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

## Edit Quick Link

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

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

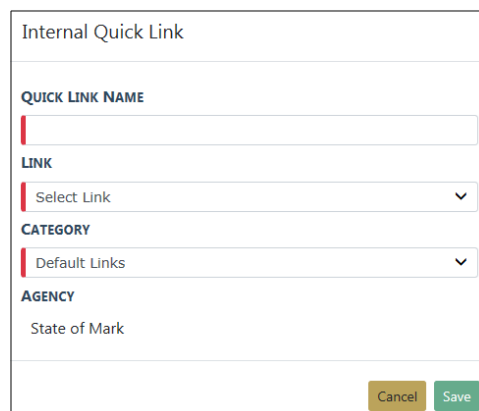
The *Edit Agency Internal Quick Link* or the *Edit Agency External Quick Link* window displays.

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

## Add Quick Link

Use the following procedure to add a quick link.

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



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

External Quick Link

LINK NAME

URL

AGENCY

State of Mark

Cancel Save

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

## Agency Settings

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

Agencies / Agency Settings

Go Back

Agency Information - Indiana State Police Sub Agency Agency Organization Number Generation Quick Links **Agency Settings**

Select one of the links below:

Assignment Setup	
Assignment Shift Codes	0
Assignment Codes	8
Agency Vehicles	4
Agency Equipment	2

Activity Tables	
Activity Codes	0
Activity Templates	0
Time Categories	0

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

Calls For Service Tables	
Disposition Codes	45
Call Type Codes	437
Call Received Codes	15

County & Township Tables	
County Codes	2
Township Codes	1

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

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

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

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





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

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

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

## Assignment Set up

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

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

Officer Daily Log Administration

Go Back

Ang Police Department Configuration

Config

Assignment Codes

Activity Codes

Activity Templates

Time Category Codes

Shift Codes

Vehicles

Equipment

Codes configured by administrators which are not specific to any agency will also be available to the agency you are administering.

For each code table listed here, you can view every single code this agency has access to by selecting the "effective codes" tab. You will only be able to add/edit/remove codes that are exclusive to the agency your are administering.

Agency Configuration

USE LATEST ACTIVITY TIME WHEN ENTERING NEW ACTIVITIES

Yes

Save

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

**Officer Daily Log Administration** Go Back

State of Mark Configuration

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

Exclusive Agency Codes Effective Agency Codes

Show 10 entries Search:

**Two entries**

Code	Description	Active	Actions
PATROL3RD	Patrol Midnight - 8AM Shift	No	
PATROLDDAYSHIFT	Patrol 8 AM - 4 PM	No	

Showing 1 to 2 of 2 entries Previous 1 Next

**Assignment Setup**

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

## Assignment Shift Codes

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

**Officer Daily Log Administration** Go Back

State of Mark Configuration

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

Exclusive Agency Codes Effective Agency Codes

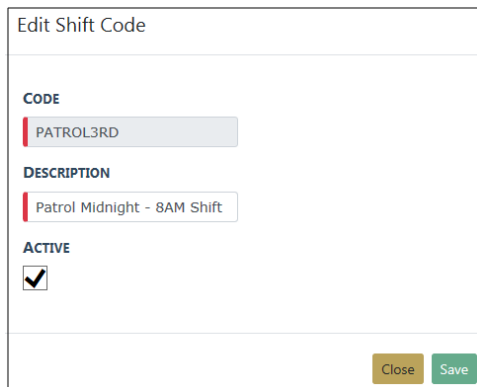
Show 10 entries Search:

**Add Shift Code**

Code	Description	Active	Actions
PATROL3RD	Patrol Midnight - 8AM Shift	No	
PATROLDDAYSHIFT	Patrol 8 AM - 4 PM	No	

Showing 1 to 2 of 2 entries Previous 1 Next

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




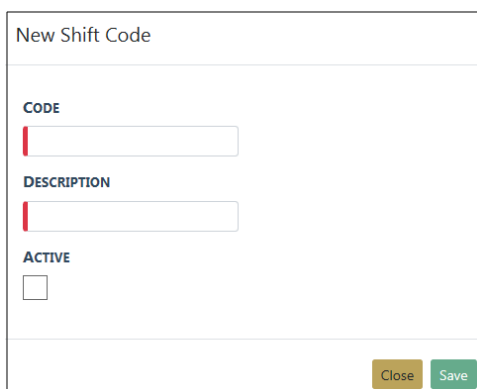
The 'Edit Shift Code' window contains three input fields: 'CODE' with the value 'PATROL3RD', 'DESCRIPTION' with the value 'Patrol Midnight - 8AM Shift', and 'ACTIVE' with a checked checkbox. At the bottom right are 'Close' and 'Save' buttons.

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

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

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

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




The 'New Shift Code' window contains three input fields: 'CODE' (empty), 'DESCRIPTION' (empty), and 'ACTIVE' with an unchecked checkbox. At the bottom right are 'Close' and 'Save' buttons.

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


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

### Assignment Codes


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

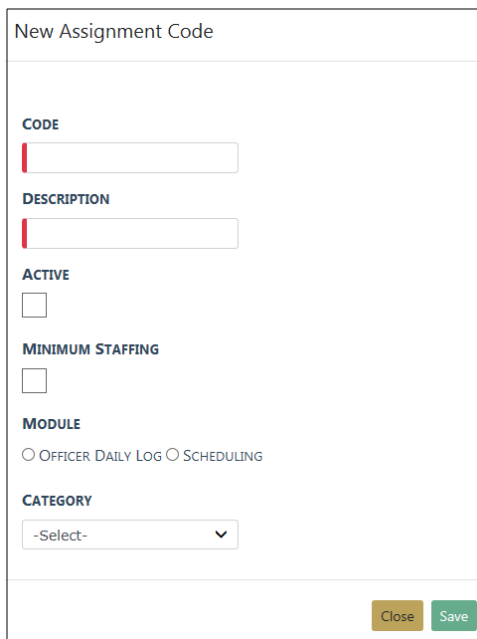
- Click  in the **Actions** column to open the *Edit Assignment Code* window.

- Change field content as needed.

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

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

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



The image shows a 'New Assignment Code' window. It contains the following fields and controls:

- CODE**: A text input field with a red vertical bar on the left.
- DESCRIPTION**: A text input field with a red vertical bar on the left.
- ACTIVE**: A checkbox.
- MINIMUM STAFFING**: A checkbox.
- MODULE**: Two radio buttons labeled 'OFFICER DAILY LOG' and 'SCHEDULING'.
- CATEGORY**: A dropdown menu with '-Select-' and a downward arrow.
- At the bottom right, there are two buttons: 'Close' (yellow) and 'Save' (green).

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




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

### Agency Vehicles

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

The screenshot shows the 'Officer Daily Log Administration' page with a 'Go Back' button in the top right. Below the title bar is a 'State of Mark Configuration' section with a row of tabs: Config, Assignment Codes, Activity Codes, Activity Templates, Time Category Codes, Shift Codes, **Vehicles** (highlighted with a red box), and Equipment. Under the 'Vehicles' tab, there are two sub-tabs: 'Agency Vehicles' and 'Effective Agency Vehicles'. The 'Agency Vehicles' sub-tab is active, showing a table with one entry. The table has columns: Year, Make, Model, VIN, License, Description, Active, and Actions. The entry is for a 2010 vehicle with VIN V123456234337HZK33, License 2HT4U, and Description 'Marked Patrol Unit - Black'. The 'Active' column shows 'Yes'. The 'Actions' column has two icons: a pencil (edit) and a trash can (delete). Above the table is a search bar and a dropdown for 'Show 10 entries'. Below the table is a pagination bar showing 'Showing 1 to 1 of 1 entries' and 'Previous 1 Next'.


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

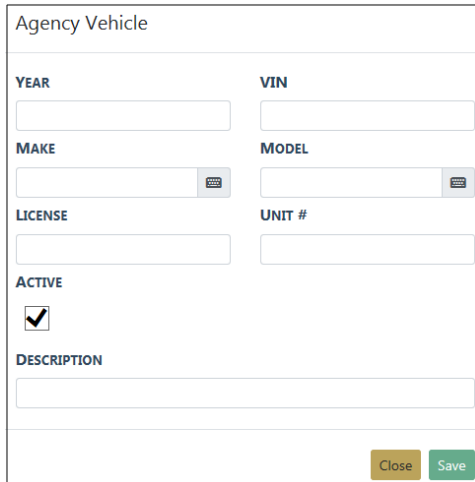
The screenshot shows the 'Update Agency Vehicle' window. It contains the following fields: YEAR (2010), VIN (V123456234337HZK33), MAKE (empty), MODEL (empty), LICENSE (2HT4U), and UNIT # (empty). There is an 'ACTIVE' checkbox which is checked. Below these is a 'DESCRIPTION' field containing 'Marked Patrol Unit - Black'. At the bottom right are 'Close' and 'Save' buttons.

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

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

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

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



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

### **Agency Equipment**

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

**Officer Daily Log Administration** Go Back

State of Mark Configuration

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



Agency Equipment Effective Agency Equipment

Show 10 entries Search:


+ Add Equipment

Type	Serial #	Make	Model	Description	Active	Actions
No data available in table						

Showing 0 to 0 of 0 entries Previous Next

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

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

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

Agency Equipment

**TYPE** **SERIAL NUMBER**

-Select-

**MAKE** **MODEL**

**ACTIVE**

☒

**DESCRIPTION**

Close Save

- Complete fields.

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


## Activity Tables

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

### Activity Codes


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

The screenshot shows the 'Officer Daily Log Administration' page with the 'Activity Codes' tab selected. The page has a 'Go Back' button in the top right. Below the title bar, there's a 'State of Mark Configuration' section with tabs for 'Config', 'Assignment Codes', 'Activity Codes' (highlighted), 'Activity Templates', 'Time Category Codes', 'Shift Codes', 'Vehicles', and 'Equipment'. Under the 'Activity Codes' tab, there are sub-tabs for 'Exclusive Agency Codes' and 'Effective Agency Codes'. A 'Show 10 entries' dropdown and a 'Search:' field are present. An 'Add Activity Code' button is in the top right of the table area. The table has columns: 'Activity Code', 'Description', 'Active', and 'Actions'. It lists two entries: 'ANIMAL' with description 'Animal Complaint' and 'PARKING' with description 'Parking Complaint', both marked as 'Yes' in the 'Active' column. The 'Actions' column contains edit and delete icons for each entry. At the bottom, it says 'Showing 1 to 2 of 2 entries' and has 'Previous', '1', and 'Next' pagination controls.


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

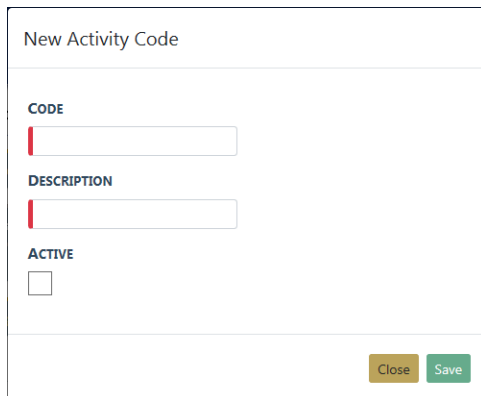
The screenshot shows the 'Edit Activity Code' window. It has a title bar 'Edit Activity Code'. Inside, there are three sections: 'CODE' with a text input field containing 'ANIMAL', 'DESCRIPTION' with a text input field containing 'Animal Complaint', and 'ACTIVE' with a checked checkbox. At the bottom right, there are 'Close' and 'Save' buttons.

- Change field content as needed.

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

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

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



The 'New Activity Code' window is a modal form with a title bar. It contains three input fields: 'CODE' (with a red vertical bar on the left), 'DESCRIPTION' (with a red vertical bar on the left), and 'ACTIVE' (a checkbox). At the bottom right, there are two buttons: 'Close' (yellow) and 'Save' (green).

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

### **Activity Templates**

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

**Officer Daily Log Administration** Go Back

State of Mark Configuration

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


Exclusive Agency Codes Effective Agency Codes

Show  entries Search:

Activity Code	Description	Active	Activities	Actions
10	Downtown Checks	Yes		<input type="button" value="+"/> <input type="button" value="✎"/> <input type="button" value="✖"/>

Showing 1 to 1 of 1 entries

Previous **1** Next



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

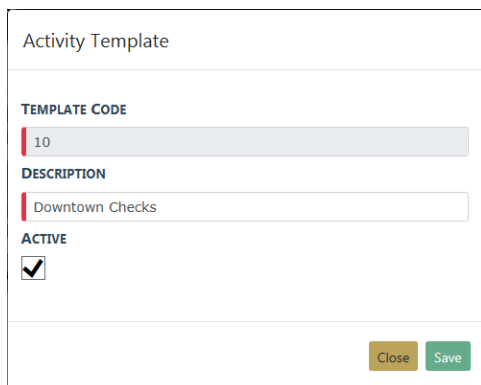
Template Activity


TEMPLATE CODE

ACTIVITY


COUNT

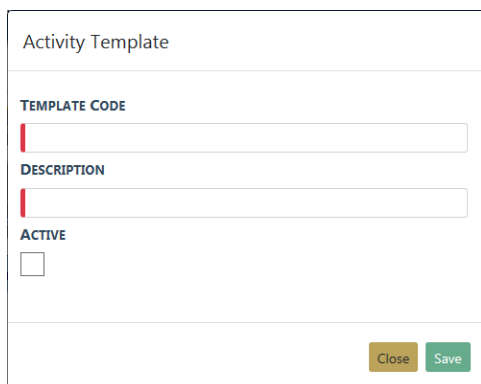
- Click  in the **Activity Code** field to open a selection list of activity codes.
  - Select the appropriate activity code.
  - Complete the **Count** field. A number goes here is for a template for a recurring activity that occurs at the agency, for example, for downtown building checks, the number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



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

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

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




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

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

### Time Categories

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


The screenshot shows the 'Officer Daily Log Administration' page with the 'Time Category Codes' tab selected. The page has a 'Go Back' button in the top right. Below the page title is a 'State of Mark Configuration' section with tabs for 'Config', 'Assignment Codes', 'Activity Codes', 'Activity Templates', 'Time Category Codes' (highlighted with a red box), 'Shift Codes', 'Vehicles', and 'Equipment'. Under the 'Time Category Codes' tab, there are two sub-tabs: 'Exclusive Agency Codes' and 'Effective Agency Codes'. Below these is a table with columns: 'Code', 'Description', 'Active', and 'Actions'. The table contains one entry: 'GAS' with description 'Gas Vehicle' and 'Active' status 'Yes'. The 'Actions' column for this entry has two icons: a pencil (edit) and a trash can (delete). Above the table is a search bar and a 'Show 10 entries' dropdown. Below the table is a pagination bar showing 'Showing 1 to 1 of 1 entries' and 'Previous 1 Next'.

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


The screenshot shows the 'Edit Time Category Code' window. It has a title bar 'Edit Time Category Code'. Inside, there are three fields: 'CODE' with the value 'GAS', 'DESCRIPTION' with the value 'Gas Vehicle', and 'ACTIVE' with a checked checkbox. At the bottom right are two buttons: 'Close' and 'Save'.

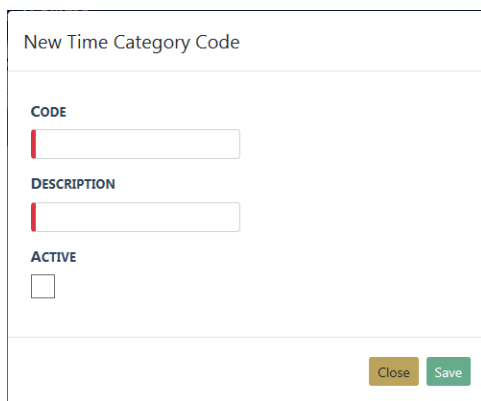
- Change field content as needed.



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

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

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



The image shows a window titled "New Time Category Code". It contains three input fields: "CODE", "DESCRIPTION", and "ACTIVE". The "CODE" and "DESCRIPTION" fields are text boxes with a red vertical bar on the left. The "ACTIVE" field is a checkbox. At the bottom right, there are two buttons: "Close" (yellow) and "Save" (green).

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

## Calls for Service Tables

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

### Disposition Codes

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

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

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

Edit Disposition Code

DISPOSITION CODE

4

DESCRIPTION

Noise

EVENT TYPE

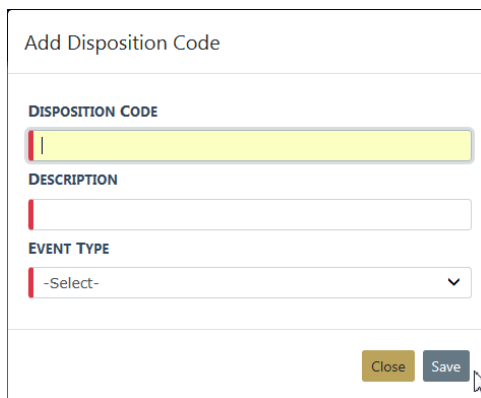
Police

Close Save

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

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

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



Add Disposition Code

**DISPOSITION CODE**

**DESCRIPTION**

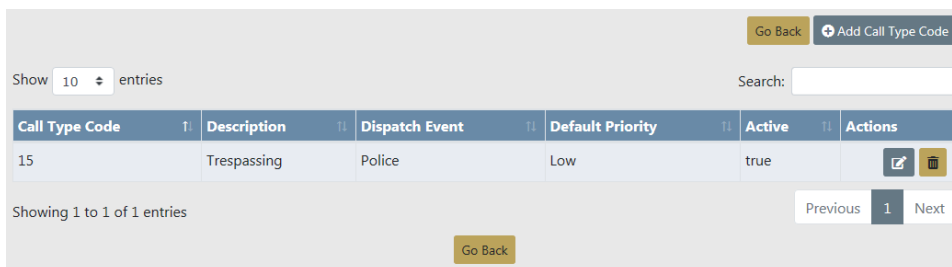
**EVENT TYPE**  
 -Select- ▼

Close Save

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



### Call Type Codes

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




Go Back Add Call Type Code

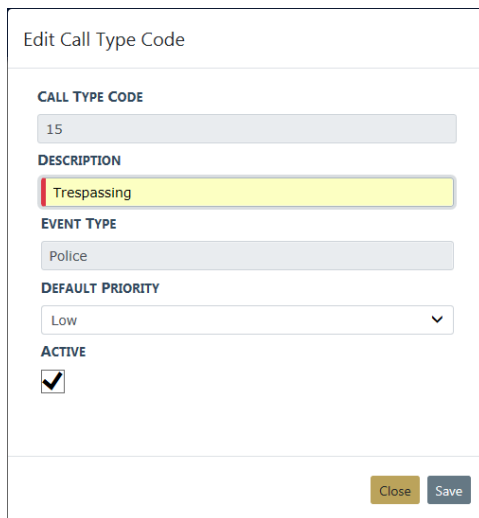
Show 10 entries Search:



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

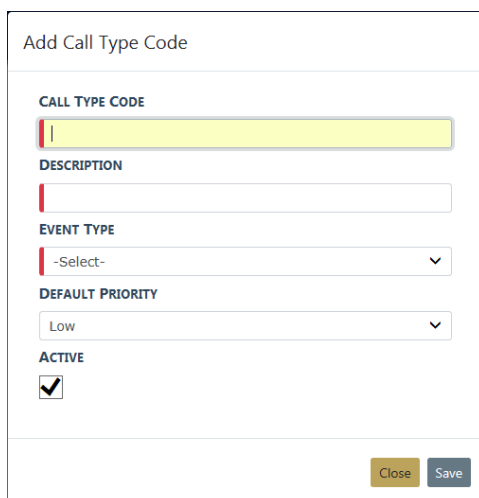
Showing 1 to 1 of 1 entries

Go Back Previous 1 Next

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



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



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

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

### Call Received Codes

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

Call Received Code	Description	Actions
Emergency Call	9-1-1	
InPerson	Walk-in	

Showing 1 to 2 of 2 entries

Go Back Previous 1 Next

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

Edit Call Received Code

**CALL RECEIVED CODE**



Emergency Call

**DESCRIPTION**

9-1-1

Close Save

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

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

Add Call Received Code

CALL RECEIVED CODE

DESCRIPTION

Close Save





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


## County and Township Tables

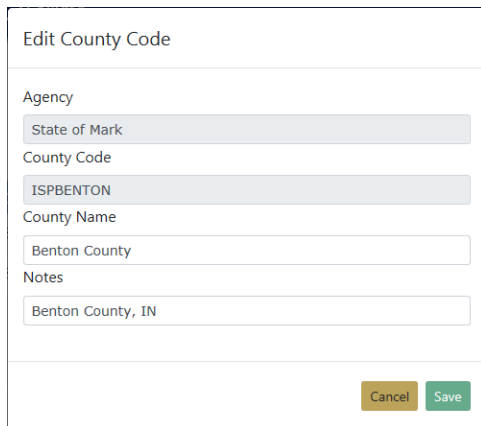
This panel contains two links, each of which is described below.

### County Codes

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

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


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

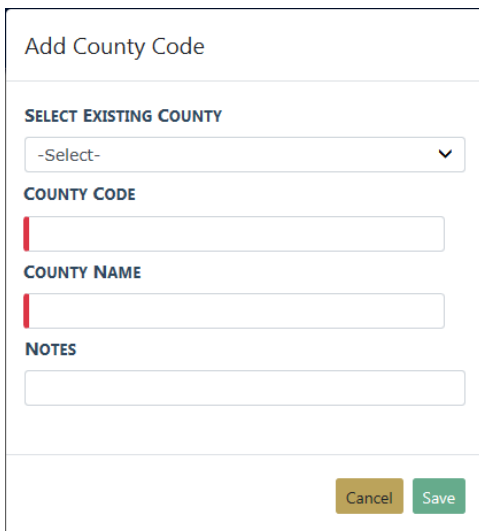


The **Edit County Code** window contains the following fields:

- Agency**: State of Mark
- County Code**: ISPBENTON
- County Name**: Benton County
- Notes**: Benton County, IN

Buttons: **Cancel** (yellow), **Save** (green)

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



The **Add County Code** window contains the following fields:

- SELECT EXISTING COUNTY**: -Select- (dropdown menu)
- COUNTY CODE**: (text input field)
- COUNTY NAME**: (text input field)
- NOTES**: (text input field)

Buttons: **Cancel** (yellow), **Save** (green)

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

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

## Township Codes

The Township Codes link opens the Township Codes page.

<div> Go Back Add Township Code </div>					
Show 10 entries			Search:		
Code	Description	Notes	County Code	County Desc	Actions
ISPBENTON	Benton Township	Benton Township, IN	ISPBENTON	Benton County	
ISPBOONE	Boone	Boone Township, IN	ISPBOONE	Boone County	
Showing 1 to 2 of 2 entries <div> Previous 1 Next </div>					

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

Edit Township

COUNTY

Benton County

TOWNSHIP CODE

ISPALLEN

TOWNSHIP NAME

Allen Township

NOTES

Benton Township, IN

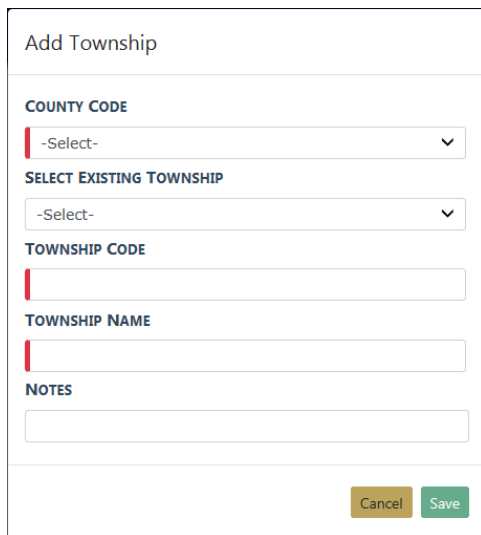
Cancel

Save

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



- Click the Add Township Code button to open the **Add Township Code** window to add a township code.



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

## Other Tables











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

### Evidence / Held Property Locations

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

Go Back Add Evidence / Held Property Location


Show 10 entries Search:

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

Showing 1 to 5 of 5 entries

Go Back Previous 1 Next

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

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

Go Back

CODE: O\_LARGE AGENCY: Indiana State Police



DESCRIPTION: Large Item Storage

LOCKER: ☐ OFFICER ACCESS: ☒

STATUS: Active PROPERTY TYPE: Evidence

Go Back Save

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

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

**Add Evidence Locations**

CODE  AGENCY

DESCRIPTION















LOCKER ☐ OFFICER ACCESS ☐


STATUS

- Complete the fields appropriately.
- Click **Save** to return to the *Evidence Locations* page where the new evidence location is now listed.

### Evidence / Held Property Destinations

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

DESTINATION CODE	DESCRIPTION	Active	
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="Go Back"/> <input type="button" value="Save"/>
Show 50 entries	Search: <input type="text"/>		
Code	Description	Active	Actions
ATTR	Defense Attorney	Y	 
CRT	Court	Y	 
LIMS_M	Mailed to LIMS	Y	 
OFF	Officer	Y	 
PROS	Prosecutor	Y	 
T_LIMS	Submitted to LIMS	Y	 
TOOFF	TO Officer	Y	 
Showing 1 to 7 of 7 entries			<input type="button" value="Go Back"/> <input type="button" value="Previous"/> 1 <input type="button" value="Next"/>

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

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

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

## Reporting Areas

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

[Show Map](#) [Add Reporting Areas](#)

Show  entries

Search:

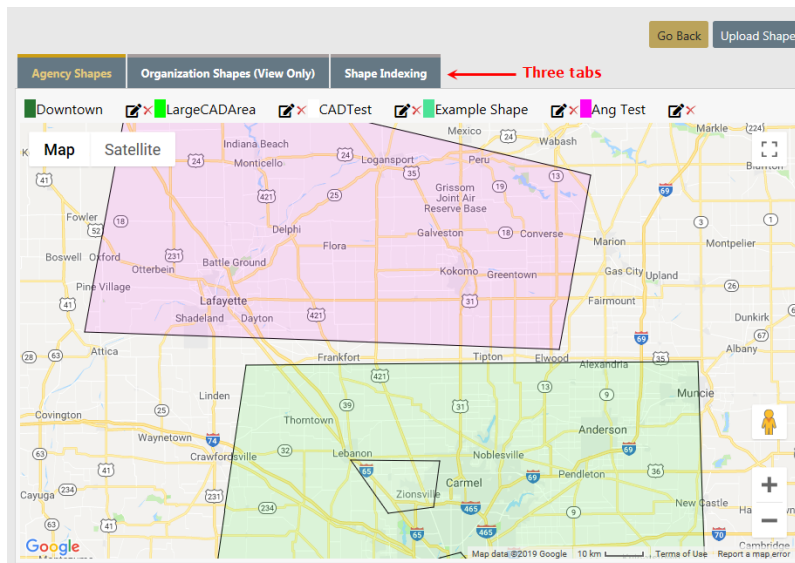
Reporting Area	Status	Agency Name	Actions
Downtown-East	Active	State of Mark	
West-Business	Active	State of Mark	

Showing 1 to 2 of 2 entries

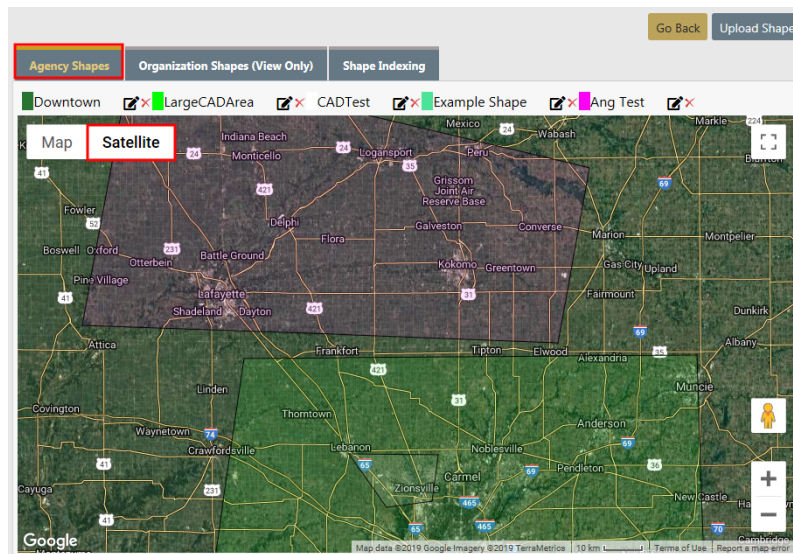
[Go Back](#)

[Previous](#) [1](#) [Next](#)

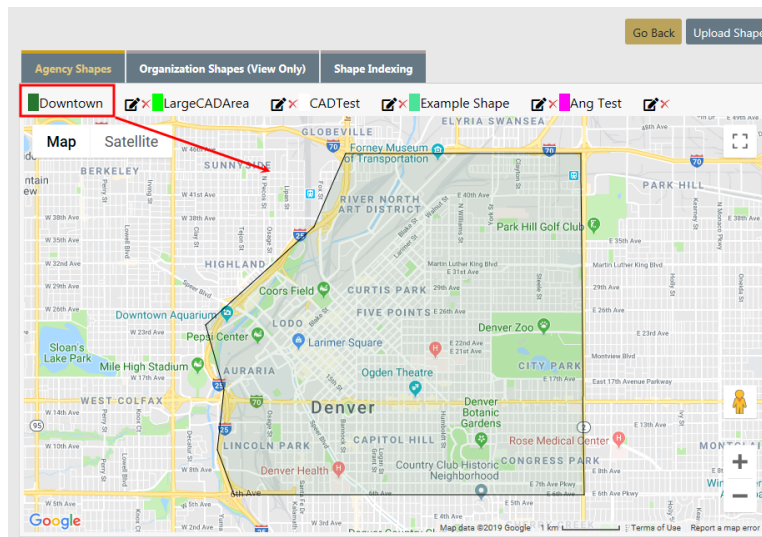
- Click the Show Map link to open the *Mapping Shapes* map as shown in the following example.



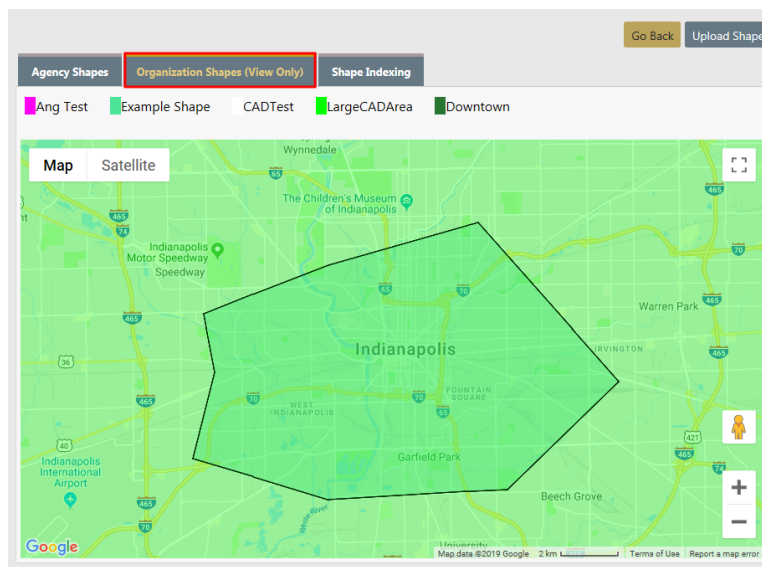
- Click **Satellite** in the upper left corner to change the display as shown in the following example.



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



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



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

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

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

Go Back






Upload Shape


Agency Shapes


Organization Shapes (View Only)

Shape Indexing

Show Totals

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

Click on the select icon  to index a shape.


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

**BEAT**  
 Test

**SUB BEAT**  
 Test

**STATUS**  
 Active

[Go Back](#)

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

**BEAT**

**SUB BEAT**

**STATUS**

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

### Towing Companies

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

Show  entries


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

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

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



COMPANY NAME		STREET NAME	
Aaa Tow		1300 Bush Street	
CITY	STATE	ZIP	
San Francisco	California	94115	
PHONE	COUNTY	ACTIVE	
111 - 333 - 3333	-Select-	<input type="checkbox"/>	
<div>Go Back Save</div>			

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

COMPANY NAME		STREET NAME	
CITY	STATE	ZIP	
	-Select-		
PHONE	COUNTY	ACTIVE	
- - -	-Select-	<input checked="" type="checkbox"/>	
<div>Go Back Save</div>			

- Complete the fields appropriately.
- Click **Save** to save the new record and return to the *Towing Companies* page where the new towing company is listed.
- Click **Go Back** to close the *Add Towing Company* page without saving and return to the *Towing Companies* page.
- Click **Go Back** to return to the *Agency Settings* page.

## Judges

The Judges link opens the *Judges* page.

Go Back

Add Judge

Show 10 entries Search:

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

Showing 1 to 10 of 16 entries

Previous 1 2 Next

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

Judge

**LAST NAME**  
Stem

**FIRST NAME**  
Robert

**MIDDLE NAME**

**TITLE**  
Judge

**USER ID**

**ACTIVE**  
☒

Close Save

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

Judge

LAST NAME

FIRST NAME

MIDDLE NAME

TITLE

USER ID

ACTIVE







☐


Close Save

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


### Court Locations

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

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

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

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

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

**Court Location** Go Back

<b>COURT NAME</b> [Text Field]	<b>COURT NAME 2</b> [Text Field]
<b>ADDRESS 1</b> [Text Field]	<b>ADDRESS 2</b> [Text Field]
<b>CITY</b> [Text Field]	<b>STATE</b> [Select]-Select-
<b>ZIP</b> [Text Field] - [Text Field]	<b>PHONE</b> [Text Field]
<b>JURISDICTION NAME</b> [Text Field]	<b>JURISDICTION TYPE</b> [Select]-Select-
<b>COMMENT</b> [Text Field]	
<b>SORT ORDER</b> [Text Field]	
<b>COURT LOCATION</b> <input type="checkbox"/>	<b>RECEIVED FROM AGENCY</b> <input type="checkbox"/>
<b>ACTIVE</b> <input checked="" type="checkbox"/>	<b>AFFIDAVIT FOOTER</b> <input type="checkbox"/>

Save

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

## Offense Codes


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

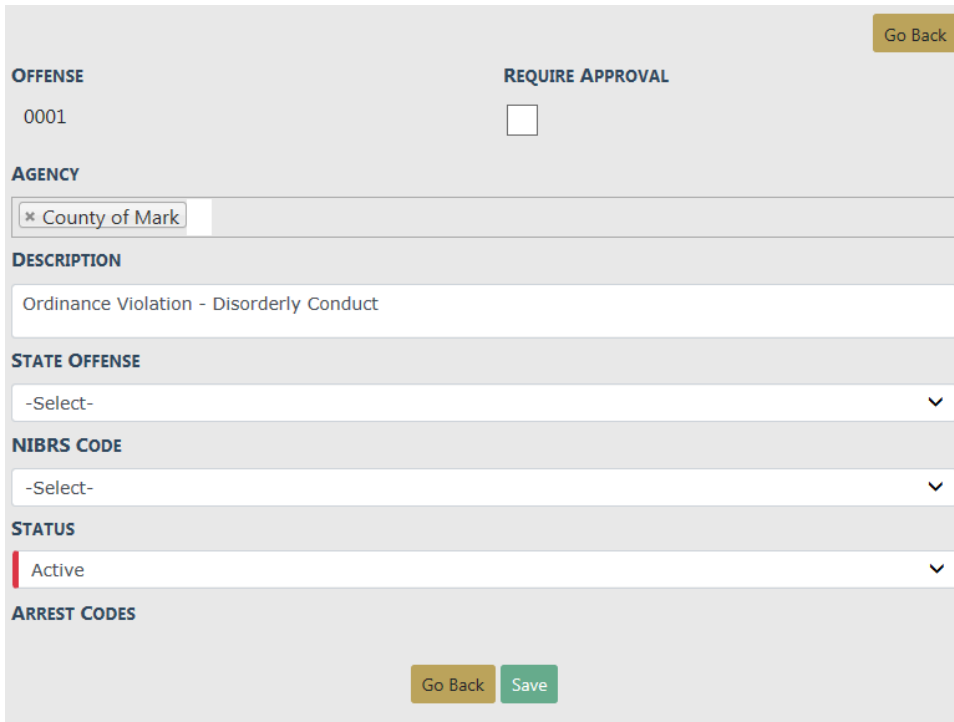
Go Back + Add Local Offense Code Print

Show 10 entries Search: [Text Field]

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

Showing 1 to 9 of 9 entries Previous 1 Next

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



**OFFENSE**  
0001

**REQUIRE APPROVAL**  
☐

**AGENCY**  
\* County of Mark

**DESCRIPTION**  
Ordinance Violation - Disorderly Conduct



**STATE OFFENSE**  
-Select-

**NIBRS CODE**  
-Select-

**STATUS**  
Active

**ARREST CODES**

Go Back Save

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

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

### Case Officer Groups

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

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

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

Officer Group

**GROUP NAME**



D35 GROUP

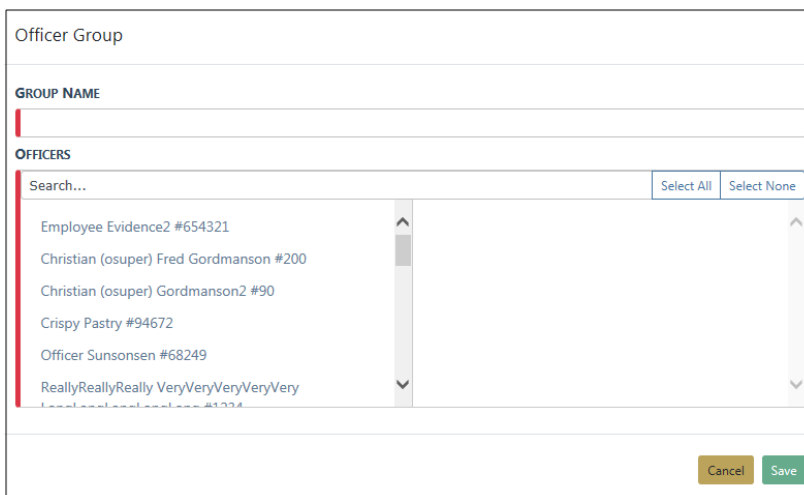
**OFFICERS**

Search...

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

Cancel Update

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



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

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

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

- Click the **Save** button.

### Screening Questions

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



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

<a href="#">Go Back</a> <a href="#">+ Add Question Type</a>				
Name	Module	Active	Special Category	Actions
Juvenile Protection:	Field Arrests	No	Juvenile Questions	 
Screening Questions	Field Arrests	No		 
Drugs Screening	Field Arrests	Yes		 
test	Field Arrests	No	Juvenile Questions	 

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

[Go Back](#)

NAME

MODULE

ACTIVE  
☐

SPECIAL CATEGORY

[Save](#)

[+ Add Question](#)

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

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

[Go Back](#)

NAME

YES / NO QUESTION  
☐

[Save](#)

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

### If a Yes/No Question

NAME Go Back

ACTIVE ☒

Was the minor in possession of drugs ☒

+ Add Answer

Answer	Comment Required	Default	Actions
Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
N/A	<input type="checkbox"/>	<input type="checkbox"/>	

Save

### If not a Yes/No Question

NAME Go Back

ACTIVE ☒

Were minors present and was action taken? ☒

+ Add Answer

Answer	Comment Required	Default	Actions
Yes, minor(s) were released to a responsible family	<input type="checkbox"/>	<input type="checkbox"/>	
Yes, social service responded directly to take charge of the m	<input type="checkbox"/>	<input type="checkbox"/>	
TEST NEW RESPONSE TO QUESTION	<input type="checkbox"/>	<input type="checkbox"/>	
Maybe	<input type="checkbox"/>	<input type="checkbox"/>	

Save

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

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

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

### Vehicle Location Codes

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

[Go Back](#)

[+ Add Location Code](#)

Show 10 entries

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

Showing 1 to 3 of 3 entries

[Previous](#)
1
[Next](#)

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

Location Code

**IMPOUND LOCATION CODE**

**DESCRIPTION**

[Cancel](#)
[Save](#)

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

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



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

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

## Narrative Templates

The Narrative Templates link opens the *Narrative Templates* page.

The screenshot shows a web interface for managing agency templates. At the top right are 'Go Back' and 'Add Template' buttons. Below them are two tabs: 'Agency Templates' and 'Effective Agency Templates'. The 'Effective Agency Templates' tab is active. Below the tabs is a 'Show 10 entries' dropdown. The main area contains a table with the following headers: 'Name', 'Description', 'Offenses', and 'Actions'. The table body is empty, displaying the message 'No data available in table'. At the bottom left of the table area, it says 'Showing 0 to 0 of 0 entries'. At the bottom right are 'Previous' and 'Next' buttons.

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

**COUNTY** Templates with no county will apply to all counties.

-Select-

**TEMPLATE NAME**

**NARRATIVE CATEGORY**

-Select-

**DESCRIPTION**

Rich text editor toolbar: Undo, Redo, Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Styles, Format, Size, Line Height.

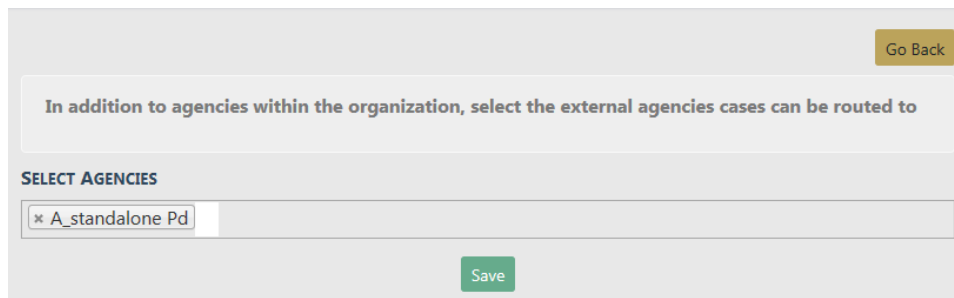
Go Back Save

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

### Case Routing

Administrators with appropriate permissions can route cases to external agencies.

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

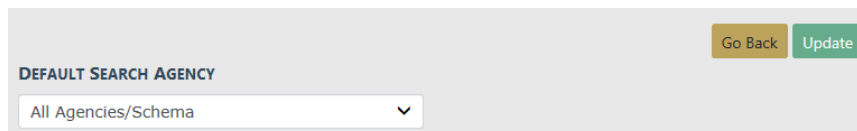


- To *select* an available agency, click in the **Select Agencies** box then select one or more agencies from the list that appears.
  - To *deselect* an agency, click on the X to the left of the agency name to remove it from the **Select Agencies** box.
- Click **Save**. A successful message appears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

### Search Options

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

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



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















### Maint Values





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

For details, refer to “Maintenance Values” on page 339.

## Notification User Groups

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

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

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

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

Go Back	
Group Details	
Group Options	
NAME	
Test Group 2	
Users	
SELECTED USERS (Remove All)	
Officer 1 - Police Agency Officer 2 - Police Agency Admin 1 - Police Agency	
Save	

- Enter a **Name** for the group.

- Select the **Users** for the group.
- Click **Save**.

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

**Notifications**

-Filter By Users-

-Filter By Users-

Daytime Officers

Daytime Officers

Weekend Officers

ISP 1


Shift #1 D42

Test Group 2

Test Notification Agency Group

## Add Agency

Use the following procedure to add an agency record.

1. On the *Administrative Home* page, click the **Agencies** icon to display the *Manage Agencies* page.
2. Click  Add Agency link in the upper right corner to display the *Agency Profile* page as shown.



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

**Agency Information -**

### Agency Information

<b>AGENCY INTERNAL CODE</b> <input style="width: 95%;" type="text"/>	<b>ORI NUMBER</b> <input style="width: 95%;" type="text"/>
<b>AGENCY DISPLAY CODE</b> <input style="width: 95%;" type="text"/>	<b>WEBSITE</b> <input style="width: 95%;" type="text"/>
<b>AGENCY CODE DISPLAY TEXT</b> <input style="width: 95%;" type="text"/>	<b>PHONE</b> <input style="width: 95%;" type="text"/>
<b>AGENCY TYPE</b> <div style="border: 1px solid #ccc; padding: 2px;">-Select- ▼</div>	<b>FAX</b> <input style="width: 95%;" type="text"/>
<b>TIME ZONE</b> <div style="border: 1px solid #ccc; padding: 2px;">-Select- ▼</div>	<b>POINT OF CONTACT</b> <input style="width: 95%;" type="text"/>

**External Authentication**

Enabled	Type	Host	Port	Shared Secret	Enable Level	Action
<input type="checkbox"/>	<div style="border: 1px solid #ccc; padding: 2px;">▼</div>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<div style="border: 1px solid #ccc; padding: 2px;">▼</div>	

**Agency Administrators**

### 3. Complete each of the sections.

- "Agency Information Tab" on page 18 for information on the **Agency Information** tab.
- "Sub Agency Tab" on page 21 for information on the **Sub Agency** tab.
- "Agency Organization Tab" on page 21 for information on the **Agency Organization** tab.
- See "Quick Links Tab" on page 27 for information on the **Quick Links** tab.
- "Agency Settings" on page 29 for information on the **Agency Settings** tab.



## Chapter 5. Roles

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

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

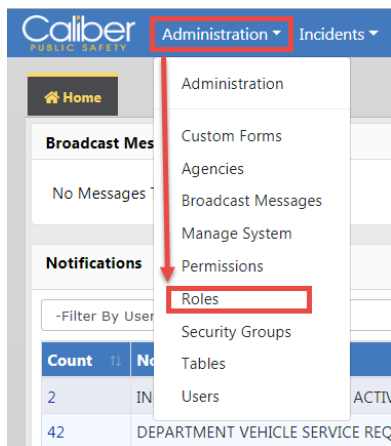
- A user must be assigned at least one role in order to perform tasks within the system.
- A user can be assigned more than one role.
- Two different roles may include one or more of the same permissions, but within a specific agency, each role is unique in its permissions make-up.
- Certain users may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

### Access Roles Module

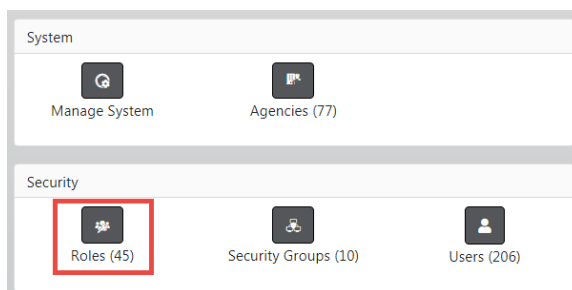
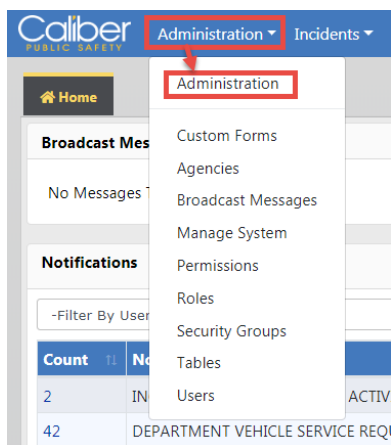
System roles used by an agency can be added and edited via the **Roles** module by certain users with administrative permissions.

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

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



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









The *Roles* page displays as shown.

Administration / Roles

Go Back Add Role Compare

Show 10 entries Search:

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

Showing 1 to 10 of 45 entries

Previous 1 2 3 4 5 Next

Go Back


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

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

## Edit Role

Use the following procedure to edit a role.

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

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

Go Back Add Role Compare

Show 10 entries

Search: copy\_ x

Compare!	Role Name	Role Description	Actions
<input type="checkbox"/>	COPY_DL TEST	IA-52785	
<input type="checkbox"/>	COPY_USER_ADMIN	Role for User Admins	

Showing 1 to 2 of 2 entries (filtered from 45 total entries)

Previous 1 Next

Go Back

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

Role Role Permission Categories

**ROLE NAME**

Copy\_DI Test

**ROLE DESCRIPTION**

IA-52785

**ACCESS LEVEL**

2000 - DBA Functions

**RESTRICT TO AGENCY**

-Select-

Go Back Save

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

Role Role Permission Categories

Role Name: Copy\_DI Test

4 items selected Remove all Add all

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

Go Back Save

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

## Add Role

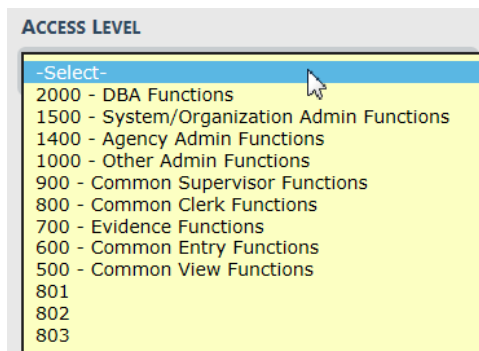
Use the following procedure to add a role for your agency.

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

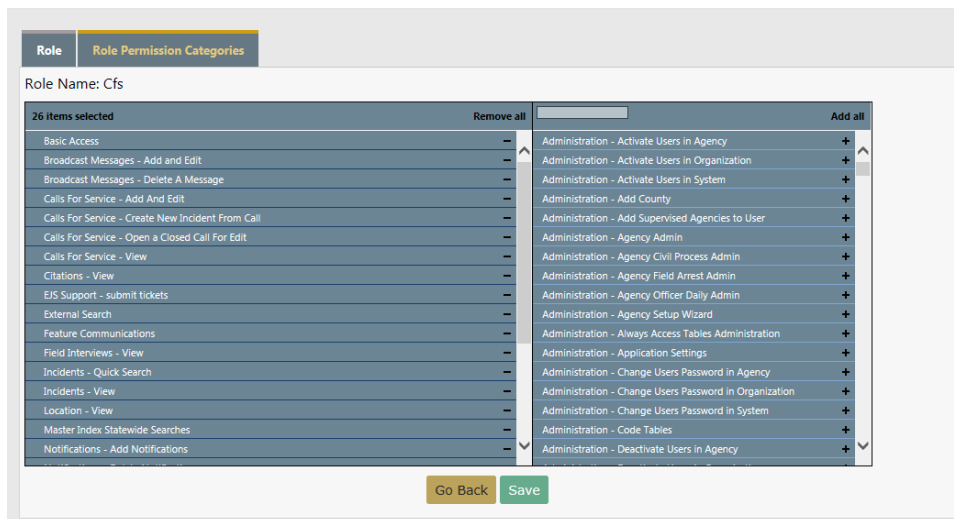
The screenshot shows the 'Add Role' form with the following elements:

- ROLE NAME**: A text input field with a red vertical bar on the left.
- ROLE DESCRIPTION**: A larger text input field.
- ACCESS LEVEL**: A dropdown menu currently showing '-Select-' with a downward arrow.
- RESTRICT TO ORGANIZATION**: A dropdown menu currently showing '-Select-' with a downward arrow.
- Buttons**: 'Go Back' (yellow) and 'Save' (green) buttons at the bottom.

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



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



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



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

## Copy Role

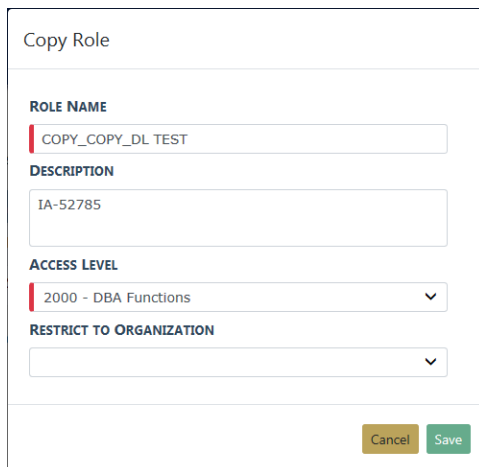
To save time setting up a new role, you have the ability to copy one role to another role if they have similar traits. During the copy process, you can update the new role as needed.

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

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

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

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



Copy Role

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

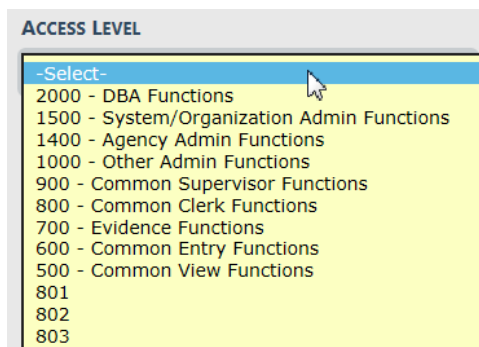
**DESCRIPTION**  
IA-52785

**ACCESS LEVEL**  
2000 - DBA Functions

**RESTRICT TO ORGANIZATION**

Cancel Save

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



**ACCESS LEVEL**

-Select-

2000 - DBA Functions

1500 - System/Organization Admin Functions

1400 - Agency Admin Functions

1000 - Other Admin Functions

900 - Common Supervisor Functions

800 - Common Clerk Functions

700 - Evidence Functions

600 - Common Entry Functions

500 - Common View Functions

801

802

803

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

The screenshot shows the 'Role Permission Categories' interface for a role named 'Copy\_DI Test'. The interface is divided into two main panels: a left panel for 'Remove all' and a right panel for 'Add all'. The left panel contains a list of 4 items selected, each with a minus sign icon to its right. The right panel contains a list of 20 items, each with a plus sign icon to its right. At the bottom of the interface, there are two buttons: 'Go Back' and 'Save'.

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

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

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

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

11. Review permissions and continue as follows:

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

12. Continue as follows:

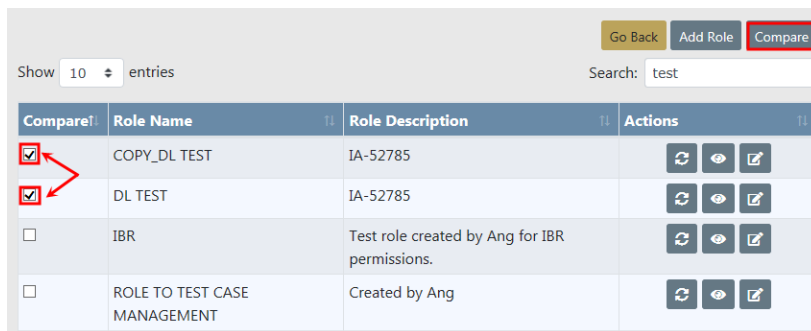
- If needed, make changes and click **Save** to return to the *Roles* page.
- If changes are not needed, click **Go Back** to return to the *Roles* page.

## Compare Role

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

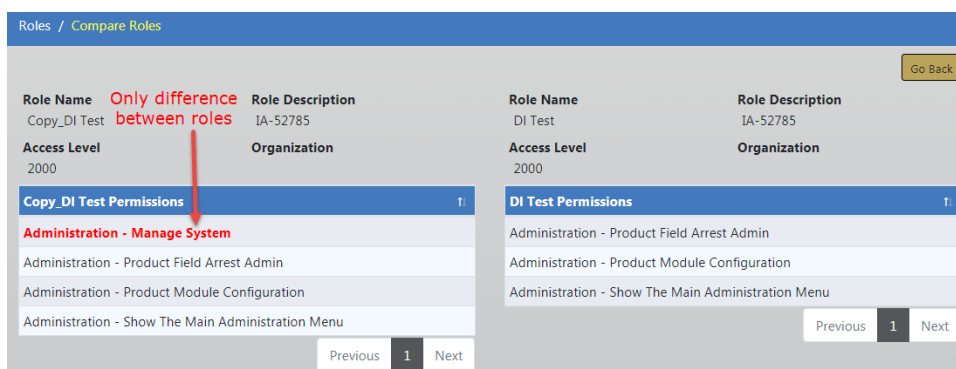
Use the following procedure to compare roles for your agency.

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



Compare!	Role Name	Role Description	Actions
<input checked="" type="checkbox"/>	COPY_DL TEST	IA-52785	
<input checked="" type="checkbox"/>	DL TEST	IA-52785	
<input type="checkbox"/>	IBR	Test role created by Ang for IBR permissions.	
<input type="checkbox"/>	ROLE TO TEST CASE MANAGEMENT	Created by Ang	

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



Role Name	Role Description
Copy_DI Test	IA-52785
DI Test	IA-52785

Access Level	Organization
2000	

Copy_DI Test Permissions	DI Test Permissions
Administration - Manage System	Administration - Product Field Arrest Admin
Administration - Product Field Arrest Admin	Administration - Product Module Configuration
Administration - Product Module Configuration	Administration - Show The Main Administration Menu
Administration - Show The Main Administration Menu	

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

## Chapter 6. Security Groups

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

### Access Security Groups Module

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

From the *Home* page,

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

The *Security Groups* page displays as shown.

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

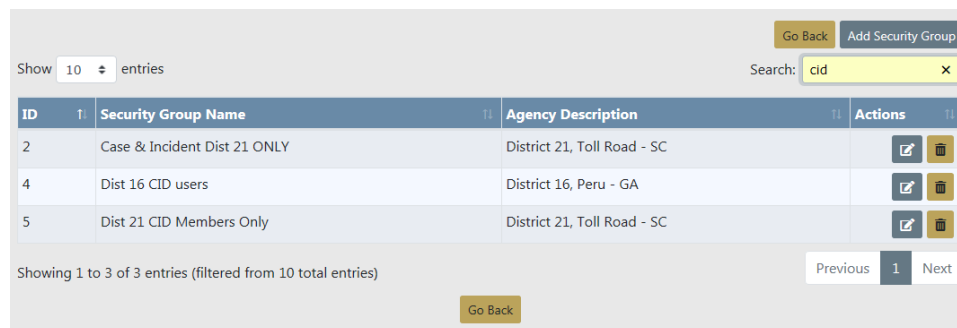
From this page, administrative users with the appropriate roles/permissions can edit existing security groups, delete security groups, and add new security groups for the agency.







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

## Edit Security Group


Use the following procedure to edit a security group.

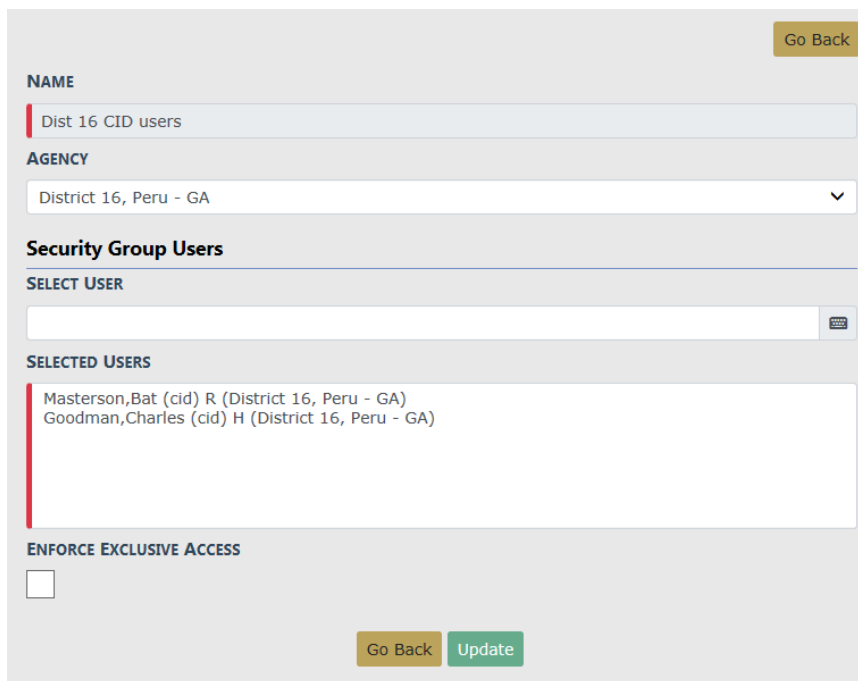
1. From the *Security Groups* page, locate the record to be changed, using one of the following methods:
  - Scroll down the list of groups until you locate the one you want to edit.
  - Use the **Search** fields to return the record.



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

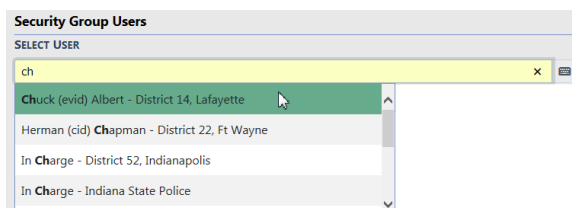
Showing 1 to 3 of 3 entries (filtered from 10 total entries)

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



The screenshot shows a web interface for managing security groups. At the top right is a 'Go Back' button. Below it, the 'NAME' field contains 'Dist 16 CID users'. The 'AGENCY' dropdown menu is set to 'District 16, Peru - GA'. The 'Security Group Users' section has a 'SELECT USER' input field and a 'SELECTED USERS' list. The list contains two entries: 'Masterson,Bat (cid) R (District 16, Peru - GA)' and 'Goodman,Charles (cid) H (District 16, Peru - GA)'. At the bottom, there is an 'ENFORCE EXCLUSIVE ACCESS' checkbox (unchecked) and two buttons: 'Go Back' and 'Update'.

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




This screenshot shows the 'Select User' dropdown menu. The search bar contains 'ch'. The dropdown list shows four results: 'Chuck (evid) Albert - District 14, Lafayette' (highlighted), 'Herman (cid) Chapman - District 22, Ft Wayne', 'In Charge - District 52, Indianapolis', and 'In Charge - Indiana State Police'.

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

## Delete Security Group

Use the following procedure to delete a security group record.

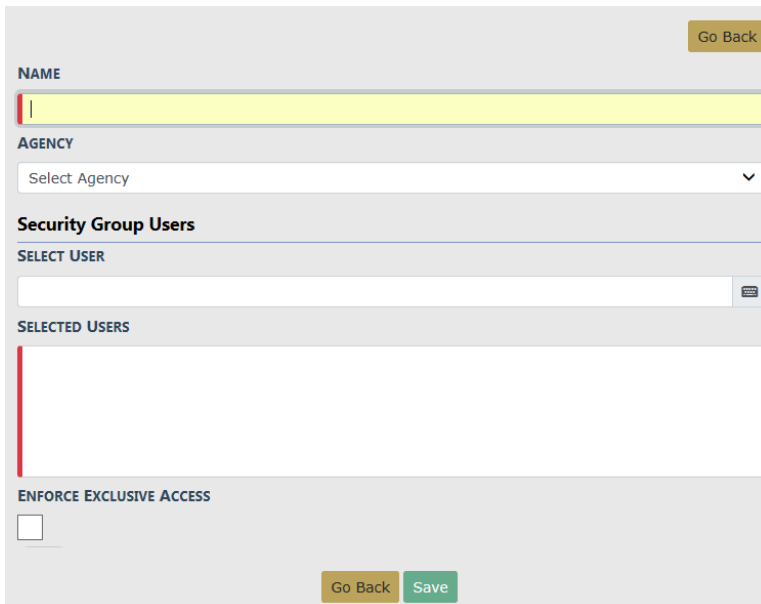
1. On the *Administrative Home* page, click the **Security Groups** icon to display the *Security Groups* page.
2. In the **Action** column, click  in the same row as a security group listing to display the prompt, *Are you sure you want to delete this Work Group?*
3. Click **Yes** to confirm deletion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

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

## Add Security Group

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

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



Go Back

NAME

AGENCY

Select Agency

Security Group Users

SELECT USER

SELECTED USERS

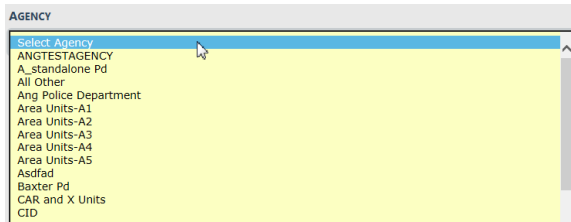
ENFORCE EXCLUSIVE ACCESS

Go Back Save

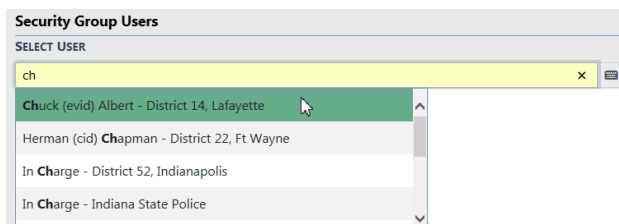
2. Type the name you want to use for this group in the **Name** field.



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



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



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



# Chapter 7. Manage Users

## Users Overview

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

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

## Manage Users

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

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

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

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

## Filter Results List

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

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

## Add User Buttons



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

To add one user, refer to "Add a User" on page 123.

To add multiple users, refer to "Add Mass Users" on page 124.

## User Accounts Tab

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

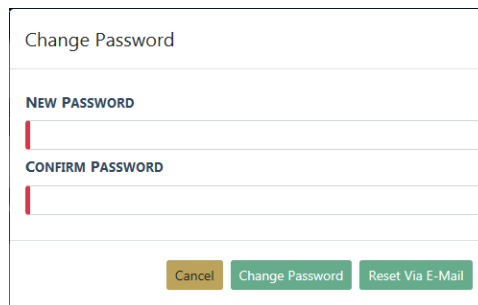
- Edit  icon
  - Click the **Edit icon** under the *Actions* column to open the *User Details* page to update user roles, employee information, security settings, etc. See "User Details" on page 97 for more information.
- Emulate users  icon
  - Click the **Emulate icon** under the *Actions* column.
  - See "Emulate a User" on page 120 for instructions.

- Change passwords  icon

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

a. Change Password Icon



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

A screenshot of the 'Change Password' window. It has a title bar 'Change Password'. Below it, there are two input fields: 'NEW PASSWORD' and 'CONFIRM PASSWORD'. Each field has a red vertical bar on the left side. At the bottom, there are three buttons: 'Cancel' (yellow), 'Change Password' (green), and 'Reset Via E-Mail' (green).

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

b. Edit Icon

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

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

## Log Tab

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

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

The screenshot shows the 'User Accounts' search form. At the top right are buttons for 'Go Back', 'Add User', and 'Mass User Entry'. Below these are tabs for 'User Accounts' and 'Log'. The form contains several input fields: 'AGENCY' (dropdown menu with '-Select-' selected), 'OLD AGENCY' (dropdown menu with '-Select-' selected), 'DATE FROM' (text field with a calendar icon), 'DATE TO' (text field with a calendar icon), 'ASSIGNEE' (text field), and 'TYPE' (dropdown menu with 'All' selected). Below the fields are 'Reset' and 'Search' buttons. At the bottom is a 'Go Back' button.

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

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

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

The screenshot shows the 'Manage Users' interface with search results. At the top right are buttons for 'Go Back', 'Add User', and 'Mass User Entry'. Below these are tabs for 'User Accounts' and 'Log'. The search form is identical to the one in the previous screenshot, but with 'Area Units-A1' selected in the 'AGENCY' dropdown. Below the form are 'Reset' and 'Search' buttons. The search results are displayed in a table with the following columns: Agency, Old Agency, Assigner, Assignee, Start Date, End Date, and Type. The table contains three rows of data.

Agency	Old Agency	Assigner	Assignee	Start Date	End Date	Type
Area Units-A1	Area Units-A1	Brent (officer) Williams	Brent (officer) Williams	02/15/2018 15:38		Home
Area Units-A1		Ralph Lauren	Ralph Lauren	06/01/2012 24:00		Assignment
Area Units-A1		Ralph Lauren	Ralph Lauren	05/31/2012 24:00		Assignment

At the bottom of the interface is a 'Go Back' button.

## User Details

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

The screenshot shows the 'Manage Users / User Details' page for a user named Dana M. The page is divided into a left sidebar and a main content area. The sidebar contains user details (User ID: D\_OFFICER, Status: Active, Type: Full Time, Organization: Indiana State Police, Home Agency: District 42, Versailles, Officer: No, Employee: Yes - Active) and a 'User Quick Links' section with links like 'Deactivate User', 'Change Password', 'Change Home Agency', and 'Create Assignment'. Below this is a 'Go To' section with a list of links including 'Profile Information', 'Security Settings', 'Preferences', 'External Searches', 'Subscriptions', 'Agency & Assignments', 'Officer Information', 'Employee Information', 'Jurisdictions', and 'Account History'. The main content area is titled 'Profile Information' and contains a 'User Information' section. This section includes a placeholder for a user photo, a 'FIRST NAME' field with the value 'Dana', a 'MIDDLE NAME' field, a 'LAST NAME' field with the value 'M', a 'TELEPHONE' field, an 'E-MAIL' field with the value 'JK...@h...cor', an 'E-MAIL ENABLED' checkbox that is checked, and a 'SUBSCRIPTION LEVEL' dropdown menu set to 'Full Time'. At the top right of the main content area are three buttons: 'Go Back', 'Emulate', and 'Update'.

A photo of the employee can be uploaded via the Employee Management page. For details, refer to "Manage an Employee" on page 133.

### Access User Details

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

The screenshot shows the 'Manage Users' interface. At the top, there are buttons for 'Go Back', 'Add User', and 'Mass User Entry'. Below these are tabs for 'User Accounts' and 'Log'. A search bar contains the text 'hicks', and filters for 'Status' (Active) and 'Subscription Level' (-All-) are visible. A 'Reset' and 'Search' button are also present. The table below shows one user entry for Aaron Hicks. The 'Actions' column contains four icons: a pencil (Edit), a person with a plus sign (Emulate), a key (Change Password), and a person with a minus sign (Delete). Red arrows point from the text labels to these icons. At the bottom, there is a 'Go Back' button and a pagination bar showing 'Previous', '1', and 'Next'.

First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions
Aaron		Hicks	ODL_US ER	Active	Full Time	District 42, Versailles	Default	OFFICER OFFICER_SUPERVISOR	<a href="#">Edit</a> <a href="#">Emulate</a> <a href="#">Change Password</a> <a href="#">Delete</a>

Showing 1 to 1 of 1 entries

## User Details Page Layout

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

The screenshot shows the left sidebar of the 'User Details' page for user Dana M. The sidebar is divided into three main sections: 'User Information', 'User Quick Links', and 'Go To'. The 'User Information' section includes fields for User ID, Status, Type, Organization, Home Agency, Officer status, and Employee status. The 'User Quick Links' section contains links for Deactivate User, Change Password, Change Home Agency, and Create Assignment. The 'Go To' section contains a list of links for Profile Information, Security Settings, Preferences, External Searches, Subscriptions, Agency & Assignments, Officer Information, Employee Information, Jurisdictions, and Account History.

**User Information**

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

**User Quick Links**

- [Deactivate User](#)
- [Change Password](#)
- [Change Home Agency](#)
- [Create Assignment](#)

**Go To**

- [Profile Information](#)
- [Security Settings](#)
- [Preferences](#)
- [External Searches](#)
- [Subscriptions](#)
- [Agency & Assignments](#)
- [Officer Information](#)
- [Employee Information](#)
- [Jurisdictions](#)
- [Account History](#)

- **User Information.**



- Various user information, such as the user id, an active or inactive user account, whether the user is full or part time, the organization and home agency of the user, whether or not the user is an officer, and whether the user is an active or inactive employee.
- This section is read-only.
- **Quick Links.**
  - Links for quick access to specific functions, such as the ability to quickly deactivate or inactivate the user, change the password, change their home agency, and create an assignment.
  - "Deactivate a User" on page 101
  - "Activate a User" on the next page
  - "Change Password" on page 102
  - "Change Home Agency" on page 103
  - "Create Assignment" on page 104
- **Go To.**
  - These are tabs to other user settings, such as Subscriptions, Officer Information, Preferences, and more.
  - Click a tab to display the user settings for that tab. For example, click Preferences to view and update notification and other preference settings.
  - The Profile Information tab opens by default when you access the *User Details* landing page.
  - Click on a tab under the **Go To** section of the left sidebar to access the tab. Profile Information is used in the below example.

The screenshot shows a web interface for editing user profile information. At the top, there's a header bar with the title "Profile Information" and three buttons: "Go Back", "Emulate", and "Update". Below this is a section titled "User Information". On the left side of this section is a placeholder for a user's profile picture, showing a silhouette of a person with dark hair. To the right of the picture are several input fields and a dropdown menu, each with a label and a red vertical bar on the left. The fields are: "FIRST NAME" with the value "Dana", "MIDDLE NAME" which is empty, "LAST NAME" with the value "M", "TELEPHONE" which is empty, "E-MAIL" with the value "JK @h...", "SUBSCRIPTION LEVEL" which is a dropdown menu currently set to "Full Time", and "E-MAIL ENABLED" which is a checkbox that is checked.

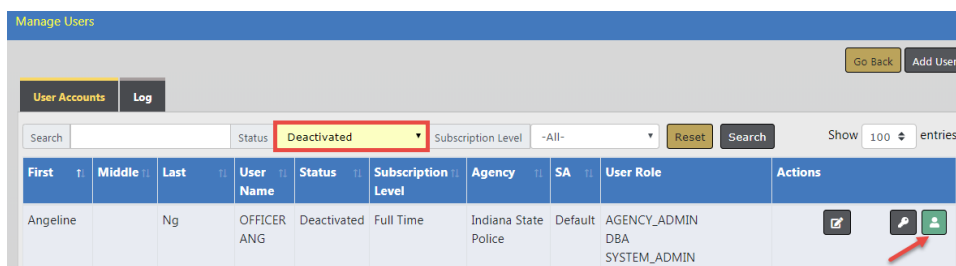
**Refer to the following for tab details:**

- "Profile Information Tab" on page 106
- "Security Settings Tab" on page 106
- "Preferences Tab" on page 107
- "Subscriptions Tab" on page 109
- "Agency & Assignments Tab" on page 110
- "Officer Information Tab" on page 112
- "Employee Information Tab" on page 114
- "Jurisdictions" on page 116
- "Account History" on page 119

## Activate a User

Use the following procedure to activate a user.

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



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

**Note:** Agency administrators can easily track end-user subscriptions by monitoring the allocation and usage of **User Subscriptions**. If your

agency's user subscription allowed limit has been reached, you receive a warning stating the maximum number has been reached and to contact support to add additional subscriptions, or deactivate an existing user account. For more information on **User Subscriptions**, refer to "Agency Information Tab" on page 18 of the Agency Profile.

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

3. Click **Yes** to confirm, or **No** to return to the *Users Lookup* page.

Message From RMS





Are You Sure?

No Yes

## Deactivate a User

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

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

Manage Users										
User Accounts		Log								
Search		Status		Active		Subscription Level		-All-		
								Reset		Search
										Show 100 entries
First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions	
Aaron		Hicks	ODL_USER	Active	Full Time	District 42, Versailles	Default	OFFICER OFFICER_SUPERVISOR	   	

3. Click **Yes** to confirm, or **No** to return to the *Manage Users* page.

Message From RMS

Are You Sure?

No Yes

## Change Password

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

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

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

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

## Reset from Manage Users Page





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

Manage Users

Go Back Add User Mass User Entry

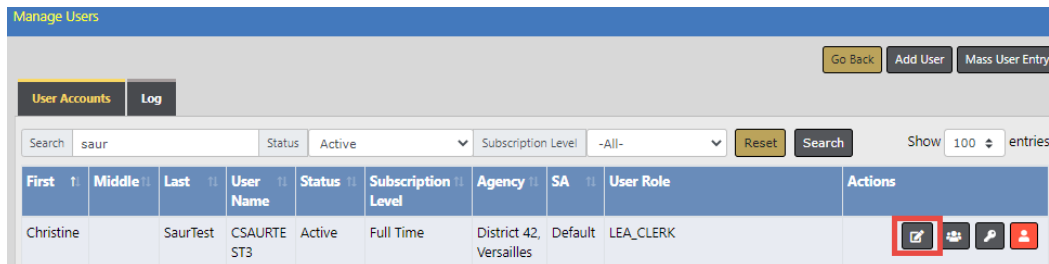
User Accounts Log

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

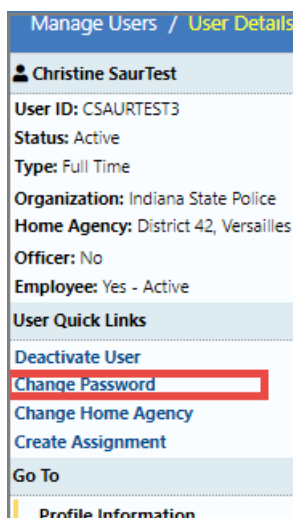
First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions
Christine		SaurTest	CSAURTEST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK	   

## Reset from Users Detail Page

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



3. Click **Change Password**.



## Change Home Agency

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





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

Manage Users

Go Back Add User Mass User Entry

User Accounts Log

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

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

- Click **Change Home Agency**.

Manage Users / User Details

**Christine SaurTest**

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

User Quick Links

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

Go To

Profile Information

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

Change Home Agency

District 42, Versailles

Cancel Save

- Click **Save**.

## Create Assignment

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

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





- Click on the **Edit** icon on the *Manage Users* page to open the *Users Detail* page.

Manage Users

Go Back Add User Mass User Entry

User Accounts Log

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

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

- Click **Create Assignment**.

Manage Users / User Details

**Christine SaurTest**

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

User Quick Links

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

Go To

Profile Information

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

New User Assignment

ASSIGNMENT  
 -Select-

START DATE  
 END DATE

ACTIVE  
☒

Cancel Save

- Select the **Assignment** from the drop-down list.
- Select the **Start Date**.
- Optionally, select an **End Date**.

8. Deselect **Active** if you do not want enable this setting at this time, otherwise, keep it checked.
9. Click **Save**.
10. Click the **Update** button on the top right of the window.

## Profile Information Tab

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

The screenshot shows the 'Profile Information' tab of the 'User Details' page. The form is titled 'User Information' and contains the following fields:

- FIRST NAME:** Christine
- MIDDLE NAME:** (empty)
- LAST NAME:** SaurTest
- TELEPHONE:** 5551112222
- E-MAIL:** ccsa
- SUBSCRIPTION LEVEL:** Full Time (dropdown menu)
- E-MAIL ENABLED:** ☒

At the top right of the form, there are three buttons: 'Go Back' (yellow), 'Emulate' (grey), and 'Update' (green).

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

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

To Emulate a user, refer to "Emulate a User" on page 120.

## Security Settings Tab

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

### Roles and Security Levels

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



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

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

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

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

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

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

### Two Factor Authentication

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

### Mobile Integration

- a. Enter the **Mobile User Name**, if applicable.
- b. Enter a **Terminal ID**, if applicable.
- c. Enter the **Unit ID**, if applicable.
- d. Enter the **One Time Password User Name**, if applicable

Click **Update** on the top right of the window.

## Preferences Tab

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





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

Manage Users

Go Back Add User Mass User Entry

User Accounts Log

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

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

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

Manage Users / User Details

**Christine SaurTest**

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

User Quick Links

Deactivate User  
 Change Password  
 Change Home Agency  
 Create Assignment

Go To

Profile Information  
 Security Settings  
**Preferences**  
 Subscriptions

- Preferences* opens.

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

**Notification Settings** Edit User Filters

EMAIL NOTIFICATIONS PRIORITY: --Select--

HOURS FOR NOTIFICATIONS: Begin [ ] End [ ]

AUDIBLE ALERT: ☒

ALWAYS SEND SUBSCRIPTION NOTIFICATIONS: ☒

**Options**

INCIDENT SETUP WIZARD: On

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

DAY / NIGHT MODE: Normal / Day Mode

DEFAULT SEARCH AGENCY: All Agencies/Schema

**Default Search Interfaces**

SELECT SEARCH INTERFACES: Click To Select

**Geographic Areas**

COURT PAPERS: Click To Select

WARRANTS: Click To Select

Go Back Save

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

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

## Subscriptions Tab

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

**OFFICER\_DMM - Profile Information** | Security Settings | Preferences | **Subscriptions** | Officer Information | Employee Information

Go Back + Add Subscription

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	

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

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

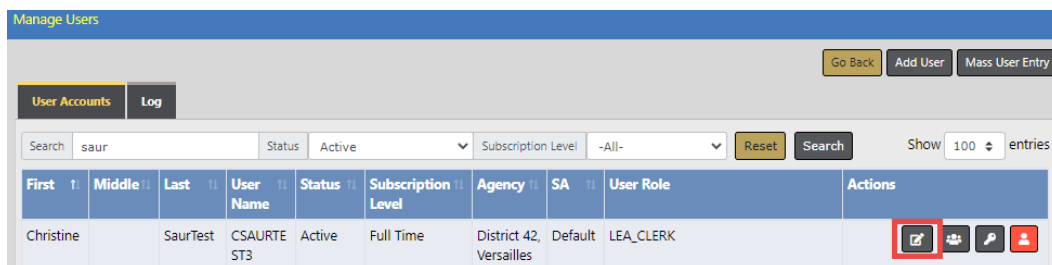
For example, users can **Subscribe** to Williams Jones' master person record to receive notification when someone applies updates to his master person record.

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

## Agency & Assignments Tab

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

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



Manage Users									
<a href="#">Go Back</a> <a href="#">Add User</a> <a href="#">Mass User Entry</a>									
<a href="#">User Accounts</a> <a href="#">Log</a>									
Search		Status		Subscription Level					
saur		Active		-All-		Reset		Search	
Show 100 entries									
First	Middle	Last	User Name	Status	Subscription Level	Agency	SA	User Role	Actions
Christine		SaurTest	CSAURTEST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK	<a href="#">Edit</a> <a href="#">Add</a> <a href="#">Delete</a>

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

Manage Users / **User Details**

**Christine SaurTest**

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

**User Quick Links**

[Deactivate User](#)  
[Change Password](#)  
[Change Home Agency](#)  
[Create Assignment](#)

**Go To**

[Profile Information](#)  
[Security Settings](#)  
[Preferences](#)  
[Subscriptions](#)  
**[Agency & Assignments](#)**  
[Officer Information](#)

4. *Agency & Assignments* opens.

**Agency & Assignments** Go Back Emulate Update

**Self Assignment**

**ENABLE SELF ASSIGNMENT**  
Default ▼

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

Search... Select All Select None

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

**Supervised Agencies**

**SELECT SUPERVISED AGENCIES**

Search... Select All Select None

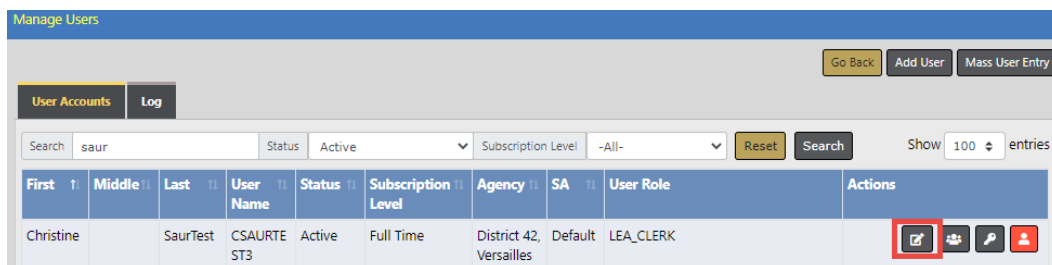
Area Units-A1  
Area Units-A2  
Area Units-A3  
Area Units-A4  
Area Units-A5  
CAR and X Units  
CID  
CIS-CID

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

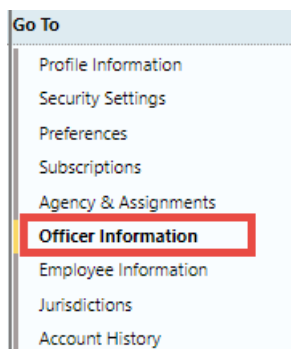
## Officer Information Tab

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

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



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



4. *Officer Information* opens.

Go Back

OFFICER\_DMM - Profile Information Security Settings Preferences Subscriptions **Officer Information** Employee Information

**Officer Information**

FIRST NAME: Dana

MIDDLE NAME:

LAST NAME: McMillan

SUFFIX:

TITLE: Patrol Officer

AGENCY: District 34, Jasper

BADGE #: DMM12345

DISPATCH ID: 6008a

CAD BADGE: 6008a

JOB STATUS: ☒ Patrol ☐ Detective ☒ Active

Go Back Update Save

**Officer History**

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

Hover mouse over info bubble for CAD Badge details

This value is used for CAD interfaces to match officers in RMS with CAD officers.


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

**Officer Information** Go Back Emulate Save

No Officer Record Exists for This User

[Click Here to Add One](#)

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

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

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

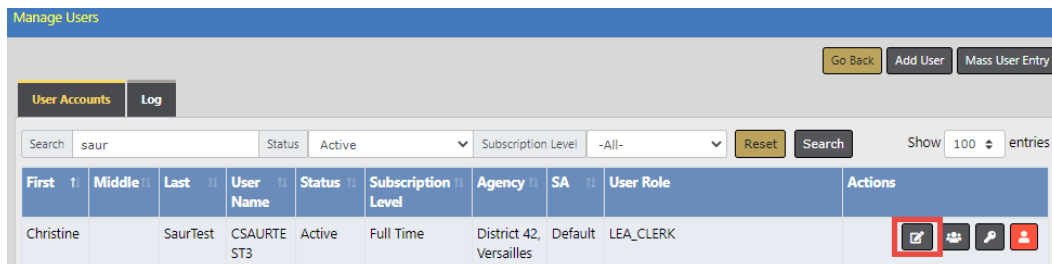
**Note:** The system does not allow you to create or reactivate an RMS user with a duplicate badge number.

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

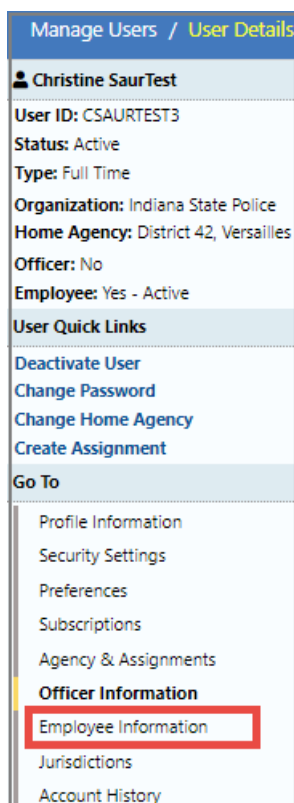
## Employee Information Tab

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

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

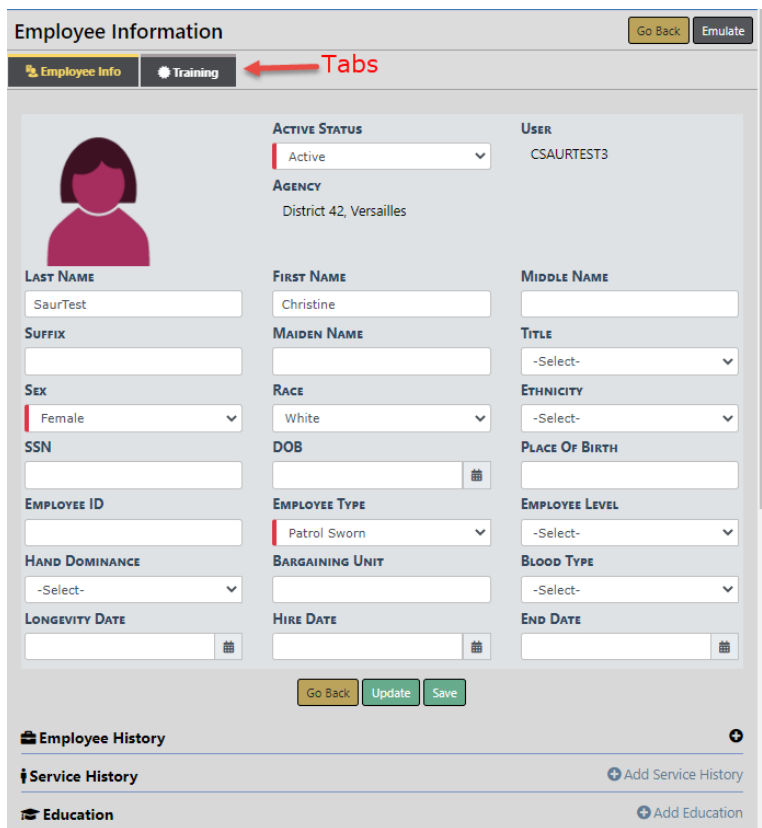


3. Click **Employee Information** on the *User Details* page.



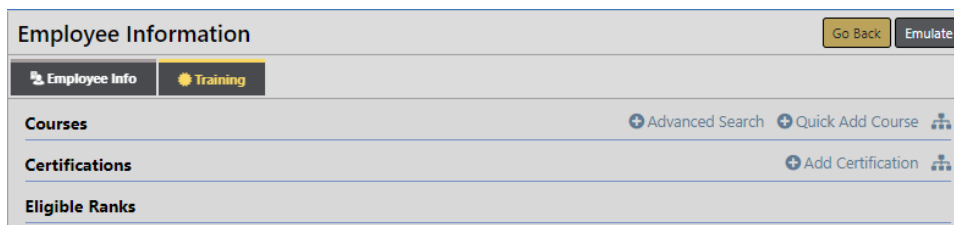
4. *Employee Info* sub-tab opens.







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

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



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

For more information on courses and certifications, refer to the "Training Module" on page 149.

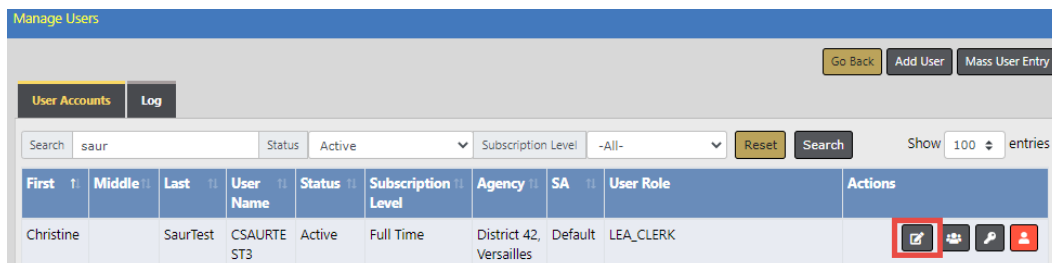
7. Click **Go Back** to return to the *Manage Users* page.

## Jurisdictions

You can update, add, enable or disable Jurisdictions.

### *Update or Add Jurisdiction*

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



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

Manage Users / User Details

**Christine SaurTest**

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

User Quick Links

Deactivate User  
Change Password  
Change Home Agency  
Create Assignment

Go To

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

4. *Jurisdictions* opens.

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

**Note:** Click the **Emulate** button to emulate that user. For more information on emulating users, refer to "Emulate a User" on page 120.

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

## Change the Default Jurisdiction

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

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

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

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

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

## Enable or Disable Jurisdictions

You can enable or disable Jurisdictions.

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

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

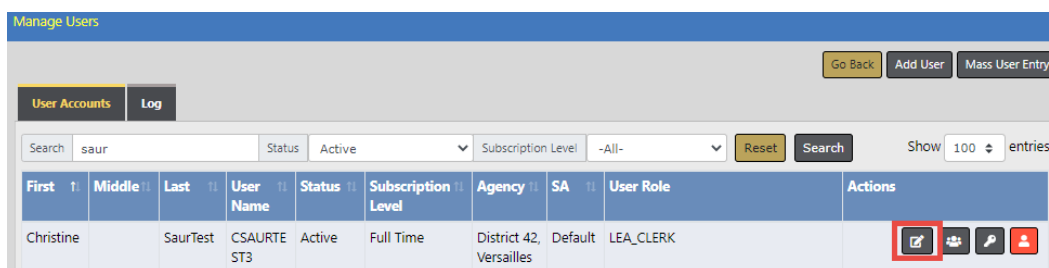
2. Click **Yes** to confirm, or **No** to return to Jurisdictions without performing the requested change.

## Account History

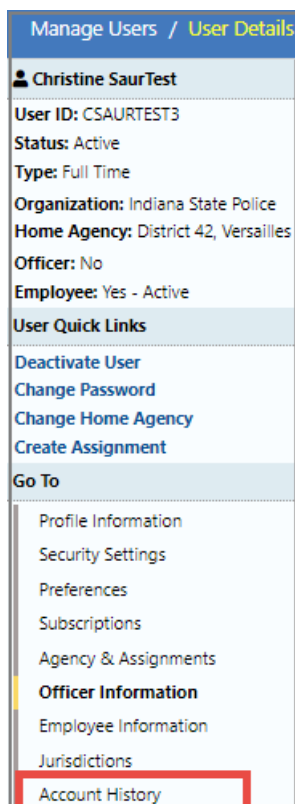
Caliber Public Safety Online RMS automatically captures and logs when users log in or out of the application and whenever user account statuses change.

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

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



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



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

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

The *Status History* tab opens by default.

Account History			Go Back	Emulate
Status History	Login 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		

## Emulate a User

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

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


There are two ways to Emulate a user:

- From the *Manage Users* page.

- From the *User Details* page.

## Manage Users Page

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

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

## User Details Page

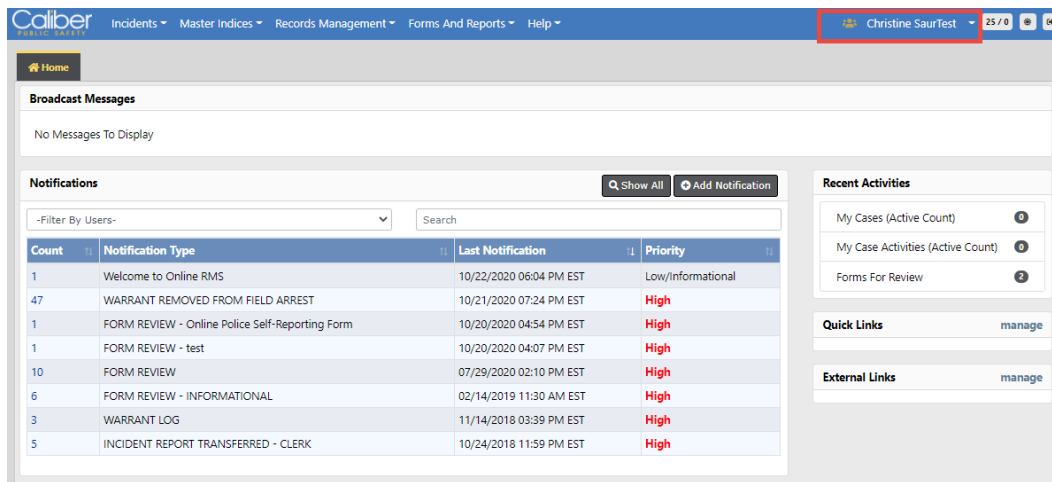
Use the following procedure to **Emulate** a user's account from the *User Details* page.

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



## Navigate Online RMS as the Emulated User

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



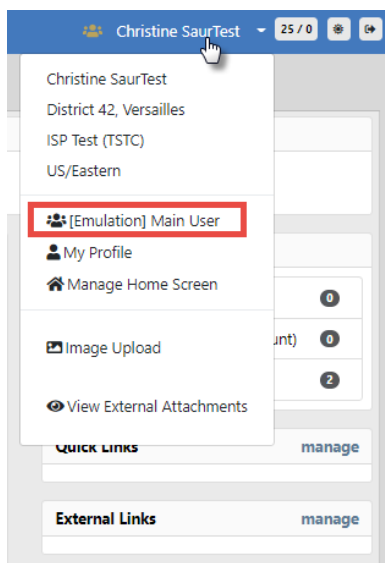
Notice that the name of the user you are emulating appears on the top right.

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

### Stop Emulating User

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

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





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



## Add a User

Use the following procedure to add one user record.

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

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

**Manage Users**

Go Back Add User Mass User Entry

User Accounts Log

Add a New User

**Manage Users / Add User**

Go Back Save

**User Information**

☐ This is a Caliber RMS Admin User

**USER ID**

**PASSWORD**

**CONFIRM PASSWORD**

**FIRST NAME**

**MIDDLE NAME**

**LAST NAME**

**AGENCY**

-Select-

**E-MAIL**

**TELEPHONE**

\* ☐ Sworn ☐ Not Sworn

☐ Agency Administrator

**SEX**

-Select-

**RACE**

-Select-

**SUBSCRIPTION LEVEL**

-Select-

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

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

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

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

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

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

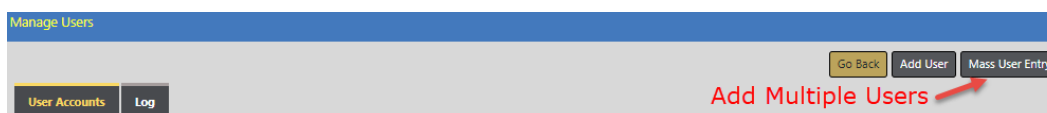
For more information on the *User Details* page and applicable sections, refer to "User Details" on page 97.

## Add Mass Users

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

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

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



Manage Users / Mass User Entry

Click the add user link to insert another user

Add Another User

NEW USER

☐ This is a Caliber RMS Admin User

User ID: csaur

First Name:

Agency: -Select-

\* ☐ Sworn ☐ Not Sworn

Sex: -Select-

Password:

Middle Name:

E-Mail:

☐ Agency Administrator

Race: -Select-

Subscription Level: -Select-

Confirm Password:

Last Name:

Telephone:

Go Back Save

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

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

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

Manage Users / Mass User Entry

Click the add user link to insert another user

Add Another User

NEW USER

Christine SaurTest

☐ This is a Caliber RMS Admin User

User ID: csaurTest

First Name: Christine

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

Manage Users / Mass User Entry

Click the add user link to insert another user

**Add Another User**

Christine SaurTest

NEW USER

☐ This is a Caliber RMS Admin User

**User ID** csaurTest **PASSWORD** \*\*\*\*\* **CONFIRM PASSWORD** \*\*\*\*\*

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

**AGENCY** District 42, Versailles **E-MAIL** ccsaur1@gmail.com **TELEPHONE** 5551112222

\* ☐ Sworn ☒ Not Sworn ☐ Agency Administrator ☐ Organization Administrator

**SEX** Female **RACE** White **SUBSCRIPTION LEVEL** Full Time (987 Remaining)

☐ This is a Caliber RMS Admin User

**User ID** **PASSWORD** **CONFIRM PASSWORD**

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

**AGENCY** -Select- **E-MAIL** **TELEPHONE**

\* ☐ Sworn ☐ Not Sworn ☐ Agency Administrator

**SEX** -Select- **RACE** -Select- **SUBSCRIPTION LEVEL** -Select-

Go Back Save

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

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

## Chapter 8. Personnel Management

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

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

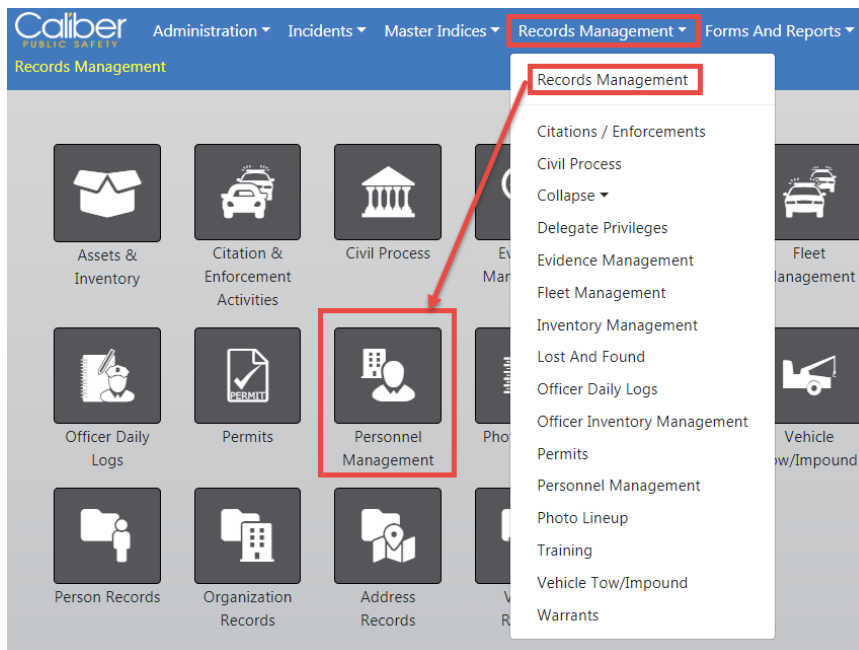
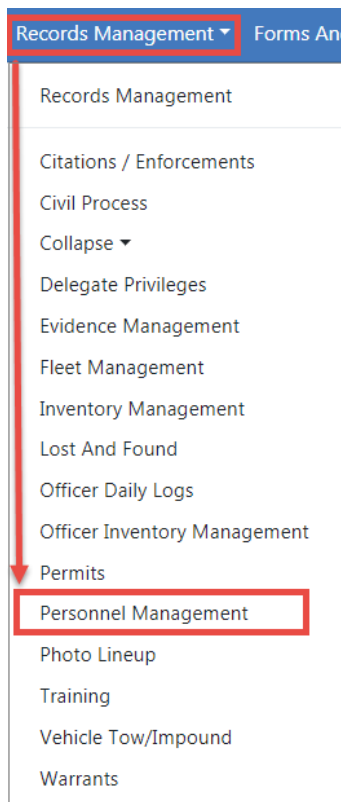
- *Master Employee* records cannot be deleted, only disabled (made inactive).
- An employee name can only be used once within one database.
- *Master Employee* records can be archived (saved) before applying updates.
- Three new permission categories for managing personnel are available to assign to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

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

This module also provides a method of tracking training and certifications of employees, providing the **Training Module** is activated for your agency. For more information about the **Training Module** refer to "Training Module" on page 149. Training

### Access Personnel Management

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

**Option 1****Option 2**

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

See "Employee Search" below and "Add an Employee" on page 131 for instructions on searching and adding employees, respectively.

## Employee Search

Use the following procedure to search for specific employee records.

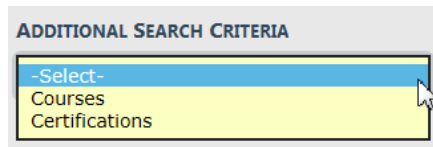
1. Access the *Personnel Management* page. (See "Access Personnel Management" on page 127, if needed.)
2. Enter the search criteria on the *Employee Search* page. Enter data into as many fields as you would like. The more information you enter, the shorter the search results, or leave all fields blank to return a list of all employees.

The screenshot shows the 'Employee Search' page in the Caliber Public Safety system. The page is titled 'Employee Search' and includes an 'Add Employee' button. The search criteria are organized into a grid with the following fields:

ACTIVE STATUS	USER NAME	AGENCY
Active		All Agencies
LAST NAME	FIRST NAME	MIDDLE NAME
SUFFIX	MAIDEN NAME	TITLE
		-Select-
SEX	RACE	ETHNICITY
-Select-	-Select-	-Select-
SSN	DOB	PLACE OF BIRTH
EMPLOYEE ID	EMPLOYEE TYPE	EMPLOYEE LEVEL
	-Select-	-Select-
HAND DOMINANCE	BARGAINING UNIT	BLOOD TYPE
-Select-		-Select-
LONGEVITY DATE FROM	LONGEVITY DATE TO	IS SYSTEM USER
		Yes No
HIRE DATE FROM	HIRE DATE TO	
END DATE FROM	END DATE TO	
ADDITIONAL SEARCH CRITERIA		
-Select-		

At the bottom of the page, there are three buttons: 'Go Back', 'Reset', and 'Search'.

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

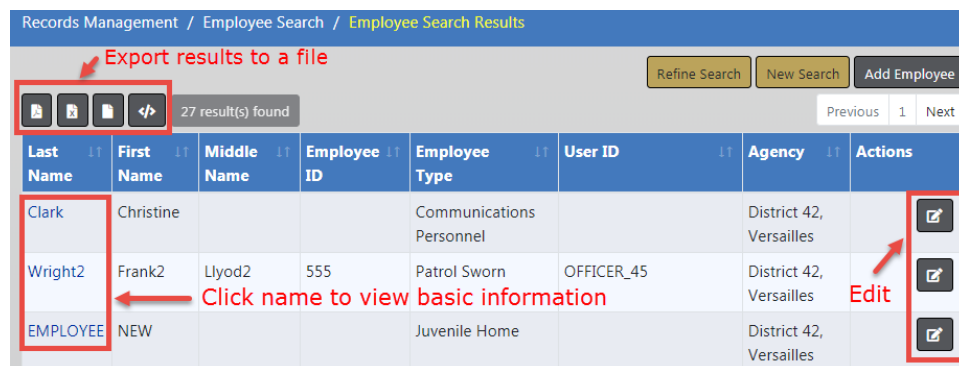


**Note:** Leave the **Is System User** Yes and No options **blank** to return a list of employees that match the search criteria, regardless of whether or not they are Online RMS users. Click **Yes** to return a list of employees that *are only* Online RMS users. Click **No** to return a list of only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

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

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

### Employee Search Results Example



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

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

Refer to "Manage an Employee" on page 133 for instructions on editing employee records.



## Add an Employee

Use the following procedure to add an employee record.

1. Access the *Personnel Management* page. (See "Access Personnel Management" on page 127, if needed.)
2. Click the **Add Employee** button on the top right of the *Employee Search* page to open the *Employee* page.

The image shows two screenshots of a web application interface. The top screenshot is the 'Employee Search' page, which has a blue header bar with 'Records Management / Employee Search'. Below the header, there's a 'Employee Search' section with a red 'Add Employee' button on the right. The search criteria include: ACTIVE STATUS (dropdown with 'Active' selected), USER NAME (text input), AGENCY (dropdown with 'All Agencies' selected), LAST NAME (text input), FIRST NAME (text input), and MIDDLE NAME (text input). The bottom screenshot is the 'Employee' form, which has a 'Go Back' button in the top right. The form is divided into three columns. The first column contains: ACTIVE STATUS (dropdown with '-Select-' selected), LAST NAME (text input), SUFFIX (text input), SEX (dropdown with '-Select-' selected), SSN (text input), EMPLOYEE ID (text input), HAND DOMINANCE (dropdown with '-Select-' selected), and LONGEVITY DATE (text input with a calendar icon). The second column contains: AGENCY (dropdown with 'District 42, Versailles' selected), FIRST NAME (text input), MAIDEN NAME (text input), RACE (dropdown with '-Select-' selected), DOB (text input with a calendar icon), EMPLOYEE TYPE (dropdown with '-Select-' selected), BARGAINING UNIT (text input), and HIRE DATE (text input with a calendar icon). The third column contains: MIDDLE NAME (text input), TITLE (dropdown with '-Select-' selected), ETHNICITY (dropdown with '-Select-' selected), PLACE OF BIRTH (text input), EMPLOYEE LEVEL (dropdown with '-Select-' selected), BLOOD TYPE (dropdown with '-Select-' selected), and END DATE (text input with a calendar icon). At the bottom of the form are 'Go Back' and 'Save' buttons.

3. Enter the applicable information in the fields provided.

**Go Back**

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

**Go Back** **Save**

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

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

**Go Back**

**Employee Info** **Training**

**ACTIVE STATUS**  
Active

**AGENCY**  
District 42, Versailles

**LAST NAME**  
Clark

**FIRST NAME**  
Christine

**MIDDLE NAME**

**SUFFIX**

**MAIDEN NAME**

**TITLE**  
-Select-

**SEX**  
Female

**RACE**  
-Select-

**ETHNICITY**  
-Select-

**SSN**  
\*\*\*-\*\*-1963

**DOB**

**PLACE OF BIRTH**

**EMPLOYEE ID**

**EMPLOYEE TYPE**  
Communications Personnel

**EMPLOYEE LEVEL**  
-Select-

**HAND DOMINANCE**  
-Select-

**BARGAINING UNIT**

**BLOOD TYPE**  
-Select-

**LONGEVITY DATE**

**HIRE DATE**

**END DATE**

**Go Back** **Update** **Save**

**Employee History** **+**

**Service History** **+** Add Service History

**Education** **+** Add Education

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

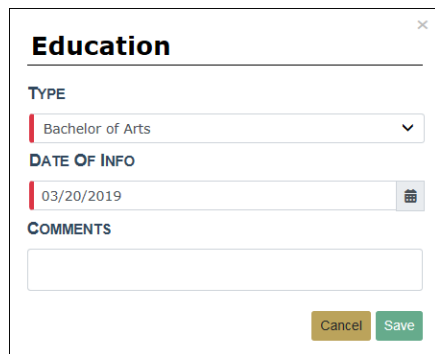
### Additional Data

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

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



Example:

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



The image shows a modal form titled "Education" with a close button (X) in the top right corner. The form contains three main sections: "TYPE" with a dropdown menu showing "Bachelor of Arts", "DATE OF INFO" with a date input field showing "03/20/2019" and a calendar icon, and "COMMENTS" with a text area. At the bottom right, there are "Cancel" and "Save" buttons.

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

Education <span style="float: right;">+ Add Education</span>			
Education	Comments	Date Of Info	Actions
Bachelor of Arts		02/26/2019	 

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

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

## Manage an Employee


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

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

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

## Update Existing Employee Record

Use the following procedure to update an employee record.

1. Access the *Personnel Management* page. (See "Access Personnel Management" on page 127, if needed.)
2. Search for the employee record you need to update. (See "Employee Search" on page 129, if needed.)
3. Click  in the **Actions** column to the far right of the user record to display the *Employee* page. There are two tabs: *Employee Info* and *Training*. The *Employee Info* tab opens by default.

</>

27 result(s) found

Refine Search

New Search

Add Employee

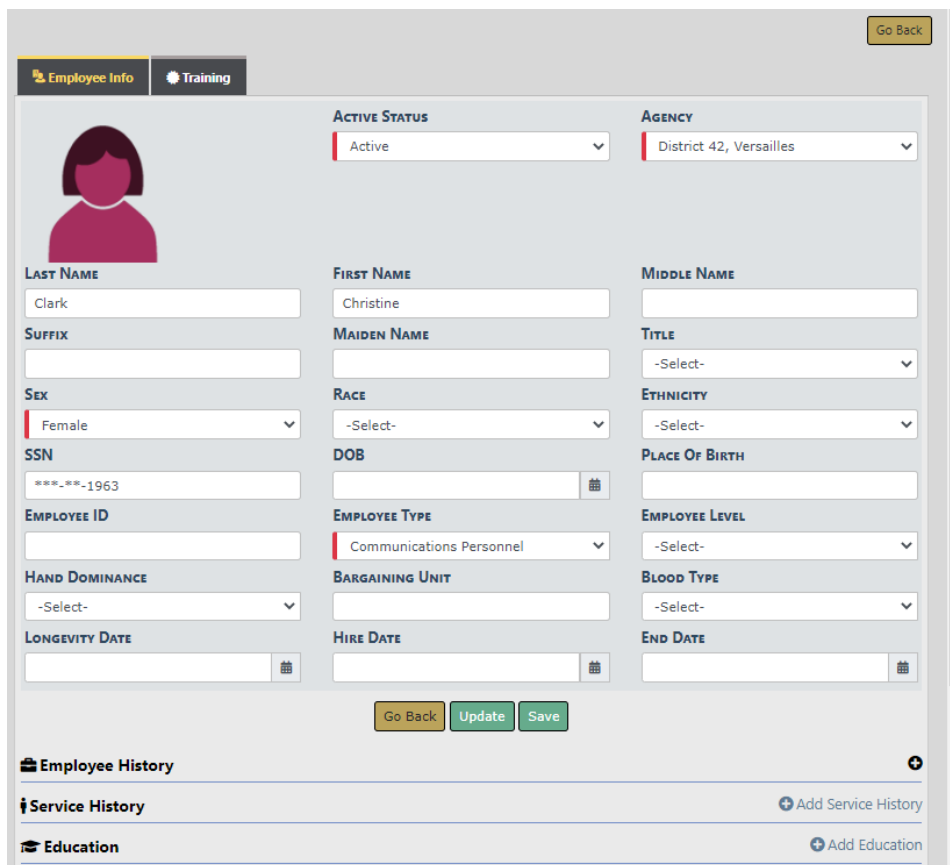
Previous

1

2

Next

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



Go Back

Employee Info Training

ACTIVE STATUS: Active

AGENCY: District 42, Versailles

LAST NAME: Clark

FIRST NAME: Christine

MIDDLE NAME:

SUFFIX:

MAIDEN NAME:

TITLE: -Select-

SEX: Female

RACE: -Select-

ETHNICITY: -Select-

SSN: \*\*\*-\*\*-1963

DOB:

PLACE OF BIRTH:

EMPLOYEE ID:

EMPLOYEE TYPE: Communications Personnel

EMPLOYEE LEVEL: -Select-

HAND DOMINANCE: -Select-

BARGAINING UNIT:

BLOOD TYPE: -Select-

LONGEVITY DATE:

HIRE DATE:

END DATE:

Go Back Update Save

Employee History

Service History Add Service History

Education Add Education

4. To add an employee picture, page down while on the *Employee Info* tab then click the **Add Attachment** link, upload the photo, then choose **Employee Photo** as the image type.
5. Make other changes as needed on the *Employee Info* tab. Refer to "Add an Employee" on page 131 for instructions on adding additional data options.
6. If applicable, click on the *Training* tab to manage **Courses**, **Certifications**, and view **Eligible Ranks** for the employee.

The screenshot shows the 'Employee Info' tab with the 'Training' sub-tab selected. It displays two tables: 'Courses' and 'Certifications'.

Name	Description	Score	Pass/Fail	Start Date	Completed Date	Days Until Expiration	Actions
Accident Reporting - Pre Req 1			Passed	08/01/2018	01/27/2019	Expired	[Edit] [Delete]
Firearms Training			Passed	05/15/2018	06/10/2018	Expired	[Edit] [Delete]
Basic Training 100			Passed	04/01/2018	06/01/2018	95	[Edit] [Delete]
K-9 Training 101		50	Passed	01/01/2018	01/01/2018	N/A	[Edit] [Delete]
Basic Training 100				08/01/2018		N/A	[Edit] [Delete]
Basic Training 102-B		100	Passed	01/01/2018	06/01/2018	Expired	[Edit] [Delete]

Name	Description	Date Of Info	Days Until Expiration	Actions
DRILL SERGEANT		02/01/2018	Expired	[Delete]
Supervisor		05/21/2018	Expired	[Delete]

Below the tables is an 'Eligible Ranks' section.

## Courses

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

The screenshot shows the 'Employee Course' form. Annotations with red arrows point to specific elements:

- Click icon to view Course Catalog:** Points to the catalog icon (three dots) next to the 'Basic Training 100' dropdown.
- Click bubble to view course details:** Points to the information bubble (i) next to the 'Basic Training 100' dropdown.
- Click to add attachments:** Points to the '+ Add Attachment' link at the bottom right.

The form fields include: COURSE (Basic Training 100), COST, SCORE, PASS/FAIL (Passed), ON DUTY (-Select-), COMPLETED DATE (07/25/2018), and an Attachments section at the bottom.

Click on the information bubble to view course details without leaving the page.

Click on the Catalog icon to view the Course Catalog without leaving the page.

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

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

Course	Location	# Attendees	Start Date	End Date	Agency	Actions
Advanced K-9 Training 201		0			Area Units-A1	


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

Name	Description	Score	Pass/Fail	Start Date	Completed Date	Days Until Expiration	Actions
Accident Reporting - Pre Req 1			Passed	08/01/2018	01/27/2019	Expired	<a href="#">Edit</a>

- d. Click the **Delete** icon to delete a *Employee Course Information* record.
- e. Click **Yes** to confirm delete or click **No** to exit without deleting.

## Certifications

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

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

### Eligible Ranks

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

### Update

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

### Save


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







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



## Delete Additional Options

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

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

Education <span style="float: right;">+ Add Education</span>			
Education	Comments	Date Of Info	Actions
GED Certification		02/28/2018	 
Certification		12/02/2017	 

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

Message From RMS

Are You Sure?

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

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

## Navigate to the User Record

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

Employee Info

Training

ACTIVE STATUS

Active

USER

OFFICER\_45

AGENCY

District 42, Versailles

LAST NAME

Wright2

FIRST NAME

Frank2

MIDDLE NAME

Llyod2

Manage User

Go Back

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



## Chapter 9. Criminal Complaint

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

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

Court Cases can be associated with Criminal Complaints.

### Two Approval Levels

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

#### Level 1

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

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

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

#### Level 2

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

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

The supervisor approves the complaint.

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

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


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

## Turn on Criminal Complaint Approval Level 2


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

1. Access the **Maint Value** table. For instructions, refer to “Access Maintenance Values” on page 340.
2. In the Search field, type **complaint\_2** to display the record.

Show 10 entries Search:

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

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

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

Edit Maintenance Value

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

Cancel OK

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

## Configurations

### Permissions

The following permissions are available:

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

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

## New Number Generation Types

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

## EJS\_CODES

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

## Notification Types

- Criminal Complaint Approval Request
- Criminal Complaint Disapproved

- Criminal Complaint Ready to be Submitted

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

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

1. Access the **Maint Value** table. For instructions, refer to “Access Maintenance Values” on page 340.
2. In the Search field, type **crim\_comp** to display the record.


Show 10 entries

Search: crim\_comp

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

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

Previous 1 Next

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

Edit Maintenance Value

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

Cancel Ok


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

## Create Criminal Complaint from Arrest

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


1. Access the **Maint Value** table. For instructions, refer to “Access Maintenance Values” on page 340.
2. In the Search field, type **complaint\_create** to display the record.

Show 10 entries Search: complaint\_create

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

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

Previous 1 Next

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

Edit Maintenance Value

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

Cancel Ok

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





# Chapter 10. Court Cases

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

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

Court Cases can be associated with Criminal Complaints.

## Configurations

### Permissions

The following permissions are available:

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

### EJS\_CODES

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

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

## Notification Types

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

# Chapter 11. Training Module

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

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

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

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

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

## Template

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

**Note:** Templates are managed only through the *Administration* menu. For more information on managing Templates refer to "Manage Course Configurations" on page 153.

## Course Instance

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

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

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

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

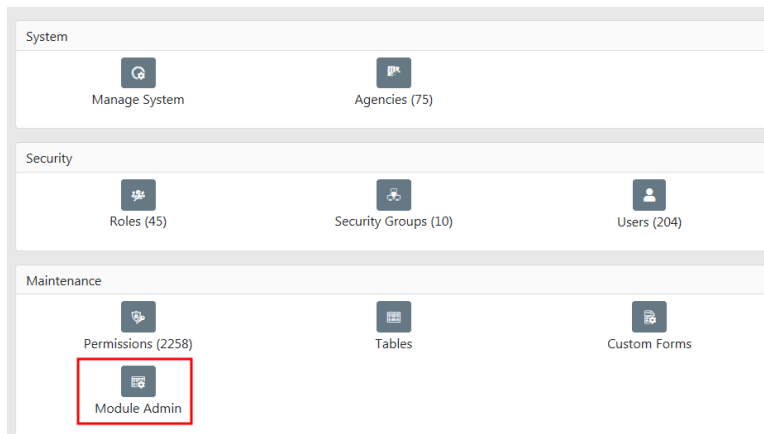
There are three new permissions categories beginning with the Online RMS 10.31 release:

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

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

## Access Course Configuration

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



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

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










































Training Administration

Go Back

Course TemplatesMaintenance SettingsCourse TypesCourse Classifications

Four tabs

Add Course Template

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

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

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

## Configure Courses

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

## Number of Days Nearing Expiration

The *Maintenance Settings* tab contains a list of Courses and Certifications that are due to expire within a specified number of days. For details on how to configure the number of days nearing expiration, refer to "Maintenance Settings" on page 160.

## Manage Course Configurations

There are four configurations associated with a Course:

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

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

It is best practice to configure the courses in the order listed, as *Course Types* and *Course Classifications* must exist before assigning them to a *Course Template*. For more information on associating a Course Type and Course Classification with a Course Template refer to [#CourseTemplates](#).

## Course Types

### Add Course Type

1. Click on the **Course Types** tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 150.
2. Click the **Add Course Type** button to open the *Course Type Code* window.

**Training Administration** Go Back

Course Templates Maintenance Settings **Course Types** Course Classifications

+ Add Course Type

Code	Description	Active	Actions
ADVANCED	Advanced Training	Yes	
BASIC	Basic Training	Yes	
ELITE	Elite Training 2	No	
INTERMEDIATE	Intermediate Training	Yes	

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

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

Course Type Code

**CODE**

**DESCRIPTION**

**ACTIVE**

☒

Close Save

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


### Update Course Type

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



Course Type Code	
CODE	<input type="text"/>
DESCRIPTION	<input type="text"/>
ACTIVE	<input checked="" type="checkbox"/>
<div>Close Save</div>	

### Delete Course Type

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

Message From RMS	
Are You Sure?	
<div>No Yes</div>	

- a. If the *Course Type* is associated with a *Course Template* a message appears at the top of the screen stating it cannot be deleted. For more information on associating a *Course Type* with a *Course Template* refer to [#CourseTemplates](#).

## Course Classifications

### Add Course Classification

1. Click on the **Course Classification** tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 150.
2. Click the **Add Course Classification** button to open the *Course Classification Code* window.

Code	Description	Active	Actions
CLASS1	Classification 1	Yes	
CLASS2	Classification 2	Yes	
CLASS3	Classification 3	No	

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

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

Course Classification Code

**CODE**  
CLASS1

**DESCRIPTION**  
Classification 1

**ACTIVE**  
☒

Close Save


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

### Update Course Classification

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

Course Classification Code	
CODE	<input type="text" value="CLASS1"/>
DESCRIPTION	<input type="text" value="Classification 1"/>
ACTIVE	<input checked="" type="checkbox"/>
<div>Close Save</div>	

### Delete Course Classification

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

Message From RMS	
Are You Sure?	
<div>No Yes</div>	

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

## Course Templates

### Add Template

1. Click on the **Course Templates** sub-tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 150.
2. Click the **Add Course Template** link. to open the *Add Course Template* window.

**Training Administration** Go Back

**Course Templates** Maintenance Settings Course Types Course Classifications

+ Add Course Template

Name	Description	Prerequisites	Active	Actions
ANG Test			Yes	
Advanced K-9 Training 201			Yes	
Agency Startup			Yes	

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

**Add Course Template** Go Back

**NAME**  **AGENCY**

**COURSE TYPE**  **COURSE CLASSIFICATION**

**EXPIRATION DAYS**  **MINIMUM HOURS**  **PASSING SCORE**

**MAX ATTENDEES**  **MINIMUM ATTENDEES**  **TRAINING COST**

**EXTERNAL** ☐ **ACTIVE** ☒

**DESCRIPTION**

**EQUIPMENT**

**COMMENTS**

Save

- Optionally, page down to add *Prerequisites* and *Attachments*.

**Prerequisites** + Add Prerequisite

**Attachments** + Add Attachment

- Click **Add Prerequisite** to open the *Course Prerequisite* window.

**Course Prerequisite** ×

**COURSE**

Cancel Save

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

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

### Update Template

1. Click on the **Course Templates** tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 150.
2. Locate the template you want to edit then click on the **Edit** icon in the *Action* column.

**Note:** A blue Information Bubble appears in the *Description* and *Pre-requisites* columns when details have been entered into these fields. Hover over the bubble to view a portion of the data, or click on the blue bubble to view the entire entry.

Name	Description	Prerequisites	Active	Actions
ANG Test	Click the information bubble to view details		Yes	
Advanced K-9 Training 201			Yes	

3. Make the necessary changes then click the **Update** button. For details on the editing the Course Template refer to "Add Template" on page 157.
4. Click the **Back** button to return to the *Module Configuration* page.

### Delete Template

1. Click on the **Course Templates** sub-tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 150.
2. Click the Delete icon in the Action column on the *Course Template* you want to delete.
3. Click **Yes** to confirm delete, or click **No** to return to the *Course Templates* sub-tab without deleting.

Message From RMS

Are You Sure?

No

Yes

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

## Maintenance Settings

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

### Set Number of Days Nearing Expiration

1. Click on the **Maintenance Settings** tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 150.
2. Click on the **Edit** icon in the Actions column to edit the number of days.

Keyword	Description	Value	Actions
TRAINING_CERTIFICATION_DASHBOARD_NEAR_EXPIRED_DAYS	Display Certifications that are going to expire this many days from today.	30	
TRAINING_COURSE_DASHBOARD_NEAR_EXPIRED_DAYS	Display Courses that are going to expire this many days from today.	30	<b>Edit</b>

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

Maint Val

KEYWORD

TRAINING\_CERTIFICATION\_DASHBOARD\_NEAR\_EXPIRED\_DAYS

DESCRIPTION

Display Certifications that are going to expire this many days from today.

VALUE

30

Close

Save

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





# Chapter 12. Training Videos Module

## Training Videos Overview

Beginning with Online RMS 11.4.0, agencies can enhance users' training and learning experience with the **Online Training** feature. The **Online Training** feature offers standard Caliber video-based learning to all users and optionally, agency-specific videos. Videos can also be configured to pop-up on a certain page when a feature is enabled.

## Video Rules and Requirements

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

## Benefits of Video-Based Learning

- A cost-effective training approach.
- Provides up-to-date training opportunities.

- Provides a **Training Video Library** where users can keep track of their videos.

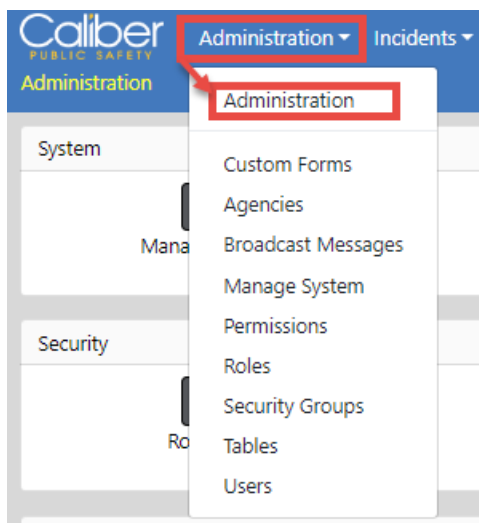
**Note:** For more information on the **Training Video Library**, refer to the *Online RMS User Guide*.

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

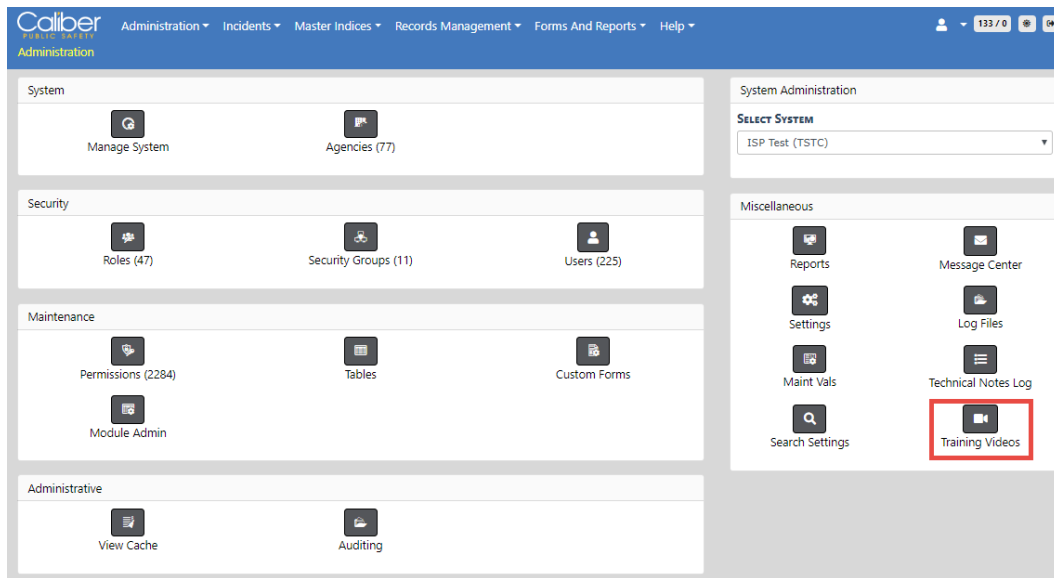
## Access Training Videos

Follow these steps to access the **Training Videos** admin link:

1. Click on the **Administration** label on the top menu bar then click **Administration** again.



2. Click on **Training Videos** under *Miscellaneous*.



3. The *Training Videos Administration* grid appears.

The screenshot shows the Training Videos Administration grid. The grid has columns for ID, Video URL, Page Category, Application Page, Sort Order, Acknowledge Required, Description, and Actions. The grid displays 11 entries. The first entry is highlighted. The grid also includes a search bar and a 'Go Back' button.

ID	Video URL	Page Category	Application Page	Sort Order	Acknowledge Required	Description	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes		
3	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		
4	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Incident_Navigation.mp4	Incidents	Data Submission	0	Yes		
5	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Incident_Navigation.mp4	Incidents	Incidents Mapping	0	No		
6	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Approve-Disapprove.mp4			0	No		
7	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Assign Incident-Supplement.mp4			0	No		
8	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Charts.mp4			0	No		
9	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Create a Supplement.mp4			0	No		
10	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Create Incident Report.mp4			0	No		
11	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Delete.mp4			0	No		

Showing 1 to 10 of 17 entries

Go Back

## Search Training Videos

Follow these steps to search **Training Videos** in Online RMS:

1. Access *Training Videos Administration*. For instructions, refer to “Access Training Videos” on page 164.
2. Click in the **Search** text box and enter a word or phrase to display results that match your entered text.

The screenshot shows the 'Training Videos Administration' page in the Caliber Public Safety system. The page has a navigation bar with links to Administration, Incidents, Master Indices, Records Management, Forms And Reports, and Help. Below the navigation bar, there's a 'Training Videos Administration' section with a 'Go Back' and 'Add Video' button. A search bar is present with the text 'Search:'. Below the search bar is a table with 11 entries. The table columns are: ID, Video URL, Page Category, Application Page, Sort Order, Acknowledge Required, Description, and Actions. The table shows 11 entries, each with a video URL, category, application page, sort order, and acknowledgment requirement. The 'Description' column contains an information icon (i) for each entry. The 'Actions' column contains edit and delete icons for each entry. At the bottom of the table, it says 'Showing 1 to 10 of 17 entries'. There are 'Previous', '1', '2', and 'Next' buttons for pagination. A 'Go Back' button is at the bottom of the page.

ID	Video URL	Page Category	Application Page	Sort Order	Acknowledge Required	Description	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes		
3	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		
4	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Incident_Navigation.mp4	Incidents	Data Submission	0	Yes		
5	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Incident_Navigation.mp4	Incidents	Incidents Mapping	0	No		
6	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Approve-Disapprove.mp4			0	No		
7	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Assign Incident-Supplement.mp4			0	No		
8	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Charts.mp4			0	No		
9	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Create a Supplement.mp4			0	No		
10	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Create Incident Report.mp4			0	No		
11	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Delete.mp4			0	No		

The screenshot shows the 'Training Videos Administration' page with a search filter applied. The search bar now contains the text 'data'. The table below the search bar shows only 2 entries, which are filtered from the original 17 entries. The table columns are the same as in the previous screenshot. The 'Description' column contains an information icon (i) for each entry. The 'Actions' column contains edit and delete icons for each entry. At the bottom of the table, it says 'Showing 1 to 2 of 2 entries (filtered from 17 total entries)'. There are 'Previous', '1', and 'Next' buttons for pagination. A 'Go Back' button is at the bottom of the page.

ID	Video URL	Page Category	Application Page	Sort Order	Acknowledge Required	Description	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes		
4	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Incident_Navigation.mp4	Incidents	Data Submission	0	Yes		

## Add Training Videos

Follow these steps to add **Training Videos** to Online RMS:

**Note:** Contact Caliber Public Safety for video uploads.

1. Access *Training Videos Administration*. For instructions, refer to “Access Training Videos” on page 164.
2. Optionally, search for specific training videos to ensure the video you want to add doesn't already exist. For instruction, refer to “Search Training Videos” on page 165.
3. Click on the **Add Video** button if the video does not already exist.

Administration / Training Videos Admin

Training Videos Administration Go Back Add Video

Show 10 entries Search:

ID	Video URL	Page Category	Application Page	Sort Order	Acknowledge Required	Description	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes		
3	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		

4. The *Training Video* dialog box appears.

Training Video

ID

Video URL

Video File Type

.mp4 Video

Application Page

-Select-

Video Description

Acknowledge Required ☒

Sort Order

0

Close Save

5. Complete the following fields in the dialog box:

#### ID

The ID is read-only. This number uniquely identifies the video and is generated automatically when you click the **Save** button.

#### Video URL

The URL to the video file. Contact Caliber Public Safety to add videos.

#### Video File Type

Online RMS supports only MP4 files at this time.

## Application Page

Select the appropriate **Application Page** from the drop-down list provided.

**APPLICATION PAGE**

Data Submission
-Select-
Administration Agencies
Administration Landing
Administration Users
<b>Data Submission</b>
Forms and Reports
Home Page
Incident Names
Incident Narratives
Incident Offenses
Incidents Approval
Incidents Create
Incidents Header
Incidents Landing
Incidents Mapping
Incidents SmartSearch
Incidents Status
Incidents Summary
Master Indexes

## Video Description

Enter a description for the video.

## Acknowledge Required

Keep the box checked to require users to acknowledge having watched the video. The video continues to pop-up automatically each time you log into Online RMS and access a page to which the video is associated until you acknowledge having watched it. The date and time watched by the user is saved to the database on videos that are required.

Uncheck the box if users are not required to acknowledge having watched the video.

## Sort Order

The Sort Order defaults to 0. The Sort Order is used if you have multiple videos that you want to appear on the same page in a particular order.

For example:


If you want two videos to show on the Home Page, you associate each video to the Home Page, then assign a Sort Order to each video: Video 1 could be Sort Order = 0 and Video 2 could be Sort Order = 1.





If the Sort Order is 0 on all videos, then the videos sort in the order you added the videos.

6. Click **Save**.

## Edit Training Video

Follow these steps to add **Training Videos** to Online RMS:

1. Access *Training Videos Administration*. For instructions, refer to “Access Training Videos” on page 164.
2. Optionally, search for specific training videos to ensure the video you want to edit. For instruction, refer to “Search Training Videos” on page 165.
3. Click on the **Edit icon**  on the video you want to update.

Training Videos Administration								
Show 10 entries		Search:						
ID	Video URL	Page Category	Application Page	Sort Order	Acknowledge Required	Description	Actions	
2	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes		 	
3	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		 	

4. The *Training Video* dialog box appears.

Training Video

ID

2

Video URL

https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS\_

Video File Type

.mp4 Video

Application Page

Data Submission

Video Description

http://www.ejusticesolutions.com/public/InterActRMS-WebHelp/RMS\_11.0\_Introduction.mp4

Acknowledge Required

☒

Sort Order

0

Close

Save

5. Update the values in the fields as needed:

### ID

The ID is read-only. This number uniquely identifies the video and is generated automatically when you click the Save button.

### Video URL

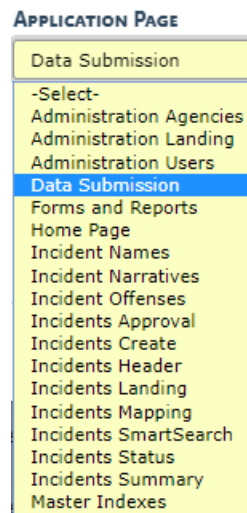
The URL to the video file. Contact Caliber Public Safety to add videos.

### Video File Type

Online RMS supports only MP4 files at this time.

### Application Page

Select the appropriate **Application Page** from the drop-down list provided.



A screenshot of a web application's drop-down menu titled "APPLICATION PAGE". The menu is open, showing a list of options. The option "Data Submission" is highlighted in blue. Other options include "-Select-", "Administration Agencies", "Administration Landing", "Administration Users", "Forms and Reports", "Home Page", "Incident Names", "Incident Narratives", "Incident Offenses", "Incidents Approval", "Incidents Create", "Incidents Header", "Incidents Landing", "Incidents Mapping", "Incidents SmartSearch", "Incidents Status", "Incidents Summary", and "Master Indexes".

APPLICATION PAGE
Data Submission
-Select-
Administration Agencies
Administration Landing
Administration Users
<b>Data Submission</b>
Forms and Reports
Home Page
Incident Names
Incident Narratives
Incident Offenses
Incidents Approval
Incidents Create
Incidents Header
Incidents Landing
Incidents Mapping
Incidents SmartSearch
Incidents Status
Incidents Summary
Master Indexes

### Video Description

Enter a description for the video.

### Acknowledge Required

Keep the box checked to require users to acknowledge having watched the video. The video continues to pop-up automatically each time you log into Online RMS and access a page to which the video is associated until you acknowledge having watched it. The date and time watched by the user is saved to the database on videos that are required.

Uncheck the box if users are not required to acknowledge having watched the video.

### Sort Order


Enter the Sort Order if you want to sort the video list in a particular order. It sorts by ID by default.

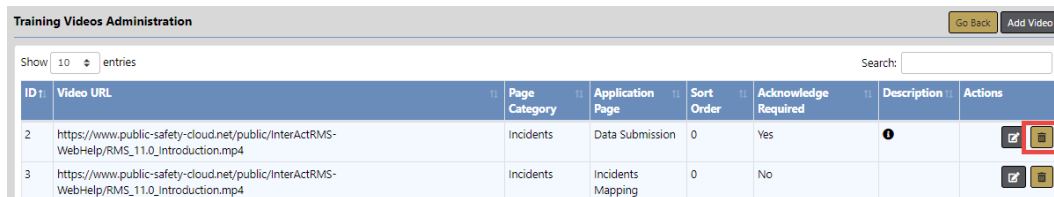
6. Click **Save**.







## Delete Training Videos

Follow these steps to delete **Training Videos** from Online RMS:

1. Access *Training Videos Administration*. For instructions, refer to “Access Training Videos” on page 164.
2. Optionally, search for specific training videos to ensure the video you want to add doesn't already exist. For instruction, refer to “Search Training Videos” on page 165.
3. Click the **Delete icon**  on the video you want to remove.



ID	Video URL	Page Category	Application Page	Sort Order	Acknowledge Required	Description	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes		 
3	https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		 

4. Click **Yes** to confirm deletion, or **No** to return to the previous screen without deleting.



# Chapter 13. Permissions Module

This module provides access to features used by your agency/schema to comprise the various roles necessary for daily operations. Access within this module varies greatly, depending upon the users administrative roles/permissions.

## Permission Categories

**Permission Categories** are assigned certain Roles, and Roles are assigned specific Permissions.

Click the **Permissions** icon on the *Administration Home* page to open the *Permission Categories* page. Alternatively, click the **Permissions** option on the **Administration** menu.




The screenshot shows a web interface for managing permission categories. At the top right is a 'Go Back' button. Below it, there's a 'Show 10 entries' dropdown and a search bar. The main content is a table with two columns: 'Category' and 'Actions'. The table lists 11 categories, all starting with 'Administration -'. Each category has a 'View' icon in the 'Actions' column. At the bottom, there's a pagination bar showing 'Showing 1 to 10 of 388 entries' and a set of page numbers from 1 to 39, with 'Previous' and 'Next' buttons.

Category	Actions
Administration - Activate Users in Agency	
Administration - Activate Users in Organization	
Administration - Activate Users in System	
Administration - Add County	
Administration - Add Supervised Agencies to User	
Administration - Agency Admin	
Administration - Agency Civil Process Admin	
Administration - Agency Field Arrest Admin	
Administration - Agency Officer Daily Admin	
Administration - Agency Setup Wizard	

This page lists the various **Permissions Categories** that are available to your agency/schema. While Permissions Categories are managed by Caliber Public Safety personnel, agency personnel with proper permissions can view the available categories and details. **Permissions Categories** are listed in alphabetical order.




To view the Roles and Permission details of a particular Category, either click the View icon

 in the **Actions** column or on the Category link to open the *Permission Category Details* page. With appropriate permissions you can also add one or more roles directly to a Permission Category.

Go Back

Show 10 entries

Search:

Category	Actions
Administration - Activate Users in Agency	
Administration - Activate Users in Organization	
Administration - Activate Users in System	
Administration - Add County	
Administration - Add Supervised Agencies to User	
Administration - Agency Admin	
Administration - Agency Civil Process Admin	
Administration - Agency Field Arrest Admin	
Administration - Agency Officer Daily Admin	
Administration - Agency Setup Wizard	

Showing 1 to 10 of 388 entries

Previous12345...39Next

**Note:** See "Permission Categories Details" below for more information.

## Permission Categories Details

To view the Roles and Permission details associated with a particular **Permission Category**, locate the category to view, then either click the view icon in the **Actions** column or the Category link to open the *Permission Category Details*.

<div> <div>Edit Role</div> <div>Go Back</div> </div>	
<b>Roles</b> <div>13 Active Users</div>	
Role	
CFS	
DISPATCH	
DBA	
OFFICER	
CID_USER	
Permissions	
Permission Description	Dispatch To
Calls For Service - Create an incident from a call	createIncidentFromDispatch
Incidents - Get Header Fields for Incident Creation AJAX	getCreationFields
Ajax call for validating a report # client side	validateReportNumber

From this page, you can:

- View the Roles associated with this **Permission Category**.
- View a list of permissions that are associated with the Roles.
- Add one or more Roles directly to a permission category.

Click the **Edit Role** button then select one or more Roles.

Edit Roles

ROLES

Search...

Select All

Select None

AGENCY\_ADMIN

AGENCY\_AD\_HOC\_REPORTING\_T

CAL\_ADMIN

CAL\_MANAGER

CASE\_SUPERVISOR

CID\_SUPERVISOR

COMMAND

COPY\_DL TEST

CFS

DISPATCH

DBA

OFFICER

CID\_USER

Cancel

Save

- View a list of active users that have one or more of the Roles listed.

Click the **Active Users** link to view the active user list.

Edit Role

Go Back

13 Active Users

**Note:** For more information on Roles, see “Roles” on page 77 .



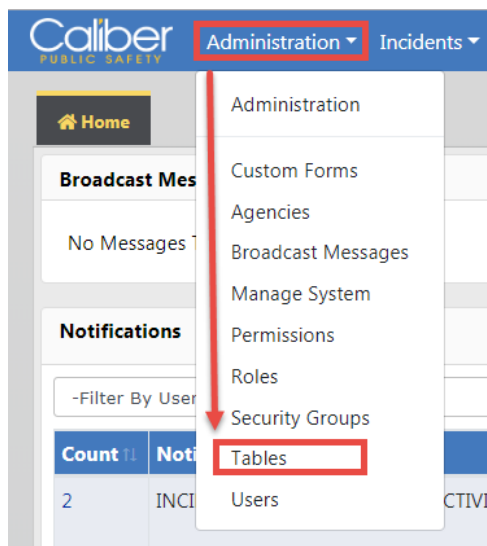
# Chapter 14. Tables

Code Tables and RMS Tables are used throughout the Online RMS application by users with proper permissions and are maintained from the Tables page. Additional System Tables are available to Caliber Public Safety personnel only and are not available for general use.

## Access Tables

Click the **Tables** icon on the *Administration Home* page to access the *Tables* page. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.

Alternatively, click on the **Administration** option on the top navigation bar to display the drop-down menu, then click **Tables**.



The **Tables** page opens with two tabs: *Code Tables* and *RMS Tables*.

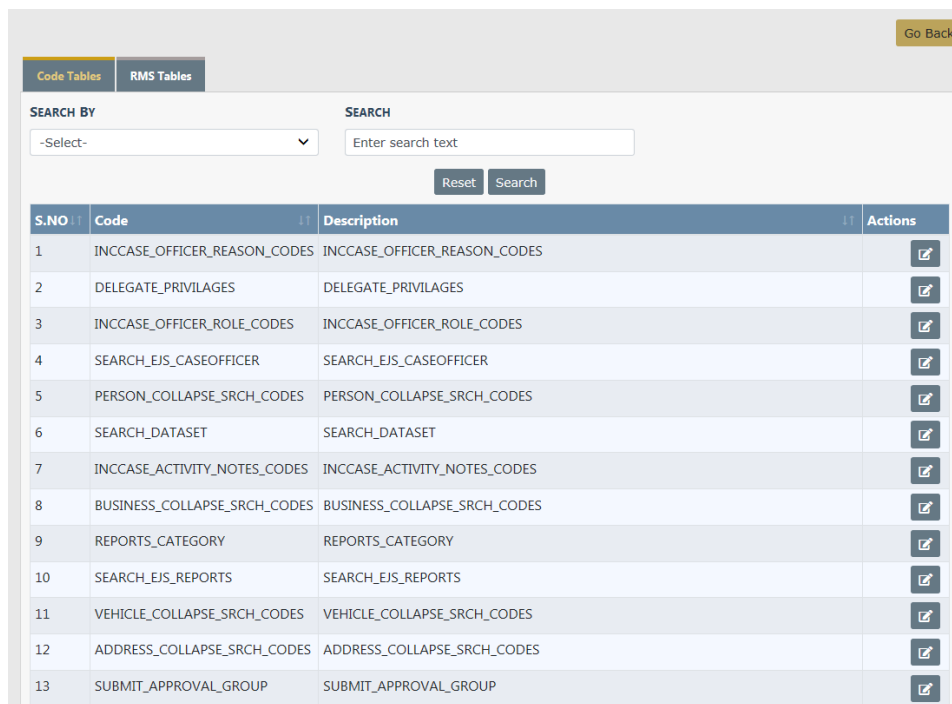
**Note:** A *System Tables* tab is also available to Caliber Public Safety personnel only, for agency setup purposes.



- For information on **Code Tables** "Code Tables" below.
- For information on **RMS Tables** tab is the second tab. "RMS Tables" on page 182.

## Code Tables

The **Code Tables** tab is open upon access of the *Tables* page.



S.NO	Code	Description	Actions
1	INCCASE_OFFICER_REASON_CODES	INCCASE_OFFICER_REASON_CODES	
2	DELEGATE_PRIVILAGES	DELEGATE_PRIVILAGES	
3	INCCASE_OFFICER_ROLE_CODES	INCCASE_OFFICER_ROLE_CODES	
4	SEARCH_EJS_CASEOFFICER	SEARCH_EJS_CASEOFFICER	
5	PERSON_COLLAPSE_SRCH_CODES	PERSON_COLLAPSE_SRCH_CODES	
6	SEARCH_DATASET	SEARCH_DATASET	
7	INCCASE_ACTIVITY_NOTES_CODES	INCCASE_ACTIVITY_NOTES_CODES	
8	BUSINESS_COLLAPSE_SRCH_CODES	BUSINESS_COLLAPSE_SRCH_CODES	
9	REPORTS_CATEGORY	REPORTS_CATEGORY	
10	SEARCH_EJS_REPORTS	SEARCH_EJS_REPORTS	
11	VEHICLE_COLLAPSE_SRCH_CODES	VEHICLE_COLLAPSE_SRCH_CODES	
12	ADDRESS_COLLAPSE_SRCH_CODES	ADDRESS_COLLAPSE_SRCH_CODES	
13	SUBMIT_APPROVAL_GROUP	SUBMIT_APPROVAL_GROUP	

The **Code Tables** tab displays a list of code tables that RMS uses to populate Lists of Values (LOV), or pick lists.

From this tab, administrative users with the appropriate roles/permissions can perform the following tasks:

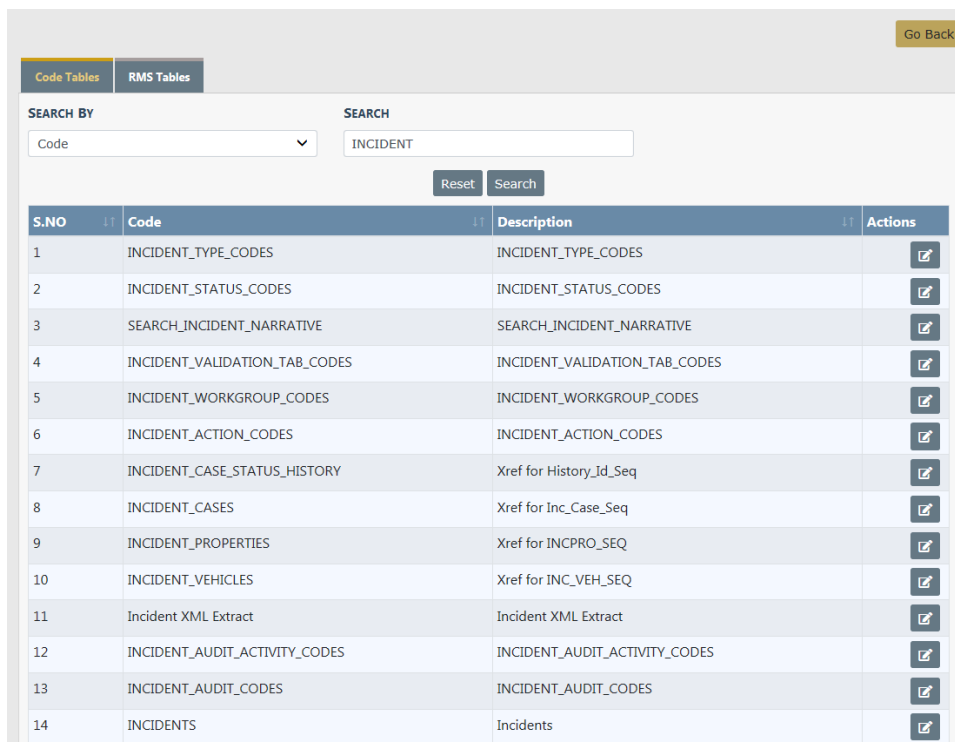
- Search existing code tables. "Search Code Tables" on the facing page for instructions.
- Edit a code in a code table. For more information, refer to "Edit a Code Table" on the facing page for instructions.



## Search Code Tables

Use the following procedure to search the **Code Tables**.

1. Click ▼ in the **Search By** field.
2. Select from the drop-down. (Available options include: Code, Description, and Table Name.)
3. Click in the **Search** text field and type in a keyword.
4. Click the **Search** button to redisplay the table as shown below for a search for *codes* with the key word *INCIDENT*.



The screenshot shows a web interface for searching code tables. At the top right is a 'Go Back' button. Below it are two tabs: 'Code Tables' (selected) and 'RMS Tables'. The search section has a 'SEARCH BY' dropdown set to 'Code' and a 'SEARCH' text field containing 'INCIDENT'. Below these are 'Reset' and 'Search' buttons. The search results are displayed in a table with columns: S.NO, Code, Description, and Actions. The table contains 14 rows of data, all of which include the keyword 'INCIDENT' in either the Code or Description column.


S.NO	Code	Description	Actions
1	INCIDENT_TYPE_CODES	INCIDENT_TYPE_CODES	
2	INCIDENT_STATUS_CODES	INCIDENT_STATUS_CODES	
3	SEARCH_INCIDENT_NARRATIVE	SEARCH_INCIDENT_NARRATIVE	
4	INCIDENT_VALIDATION_TAB_CODES	INCIDENT_VALIDATION_TAB_CODES	
5	INCIDENT_WORKGROUP_CODES	INCIDENT_WORKGROUP_CODES	
6	INCIDENT_ACTION_CODES	INCIDENT_ACTION_CODES	
7	INCIDENT_CASE_STATUS_HISTORY	Xref for History_Id_Seq	
8	INCIDENT_CASES	Xref for Inc_Case_Seq	
9	INCIDENT_PROPERTIES	Xref for INCPRO_SEQ	
10	INCIDENT_VEHICLES	Xref for INC_VEH_SEQ	
11	Incident XML Extract	Incident XML Extract	
12	INCIDENT_AUDIT_ACTIVITY_CODES	INCIDENT_AUDIT_ACTIVITY_CODES	
13	INCIDENT_AUDIT_CODES	INCIDENT_AUDIT_CODES	
14	INCIDENTS	Incidents	

Codes containing the keyword display.

5. Navigate to the Next page as needed until you locate the specific code.

## Edit a Code Table

Use the following procedure to edit a code table.

1. Locate the code table on the *Tables* page. Refer to "Code Tables" on page 178 for details.
2. Click  in the **Actions** column to display *Code Table Details*.

Go Back Setup Agency Codes

### Code Table Details




CODE	SCREEN PROMPT	SYSTEM REQUIRED
INCIDENT_TYPE_CODES		Y


NOTES

SORT ALPHABETICALLY ? ← Hover mouse over question bubble for information about sorting

☒

**Codes** Add New Code

CODE	DESCRIPTION	SCREEN PROMPT	ACTIVE	
ARIES	ARIES Accident Report		<input checked="" type="checkbox"/>	
NOTES			SYSTEM REQUIRED	
			N	
ACC	Accident		<input checked="" type="checkbox"/>	
NOTES			SYSTEM REQUIRED	
			N	
AFG	Accident FSGI		<input checked="" type="checkbox"/>	
NOTES			SYSTEM REQUIRED	

3. Click the **Add New Code** link to add a code that has been setup, or update existing entries as needed.
4. Click on the **Delete** icon  to remove a code from the list.
5. Click the **Setup Agency Codes** button on the top right of the page to include Agency Codes. **Select an Agency** from the list, then click into the **Codes** field and select one or more codes to add them to the **Codes** field.

Go Back Setup Agency Codes

### Code Table Details

CODE	SCREEN PROMPT	SYSTEM REQUIRED
INCIDENT_TYPE_CODES		Y

SELECT AN AGENCY

Indiana State Police

CODES

\* Criminal Trespass \* Animal Bite

Save



Go Back

Click **Save**, then click **Go Back** to return to the *Code Table Details* page.

- To delete a code from the code table, refer to "Delete a Code" below.
- Click **Save** at the bottom of the page to save changes and return to the *Tables* page.

## Delete a Code

Use the following procedure to delete a code from a code table.


- Locate the code table on the *Tables* page. Refer to "Code Tables" on page 178 for details.
- Click  in the **Actions** column to display the *Edit Code Table*. Refer to "Edit a Code Table" on page 179 for details.
- Locate the code you want to delete then click  to the right of the code.

Code Table Details


Go Back Setup Agency Codes

CODE	DESCRIPTION	SCREEN PROMPT	ACTIVE	SYSTEM REQUIRED
INCIDENT_TYPE_CODES			Y	

NOTES

SORT ALPHABETICALLY 

☒

Codes 

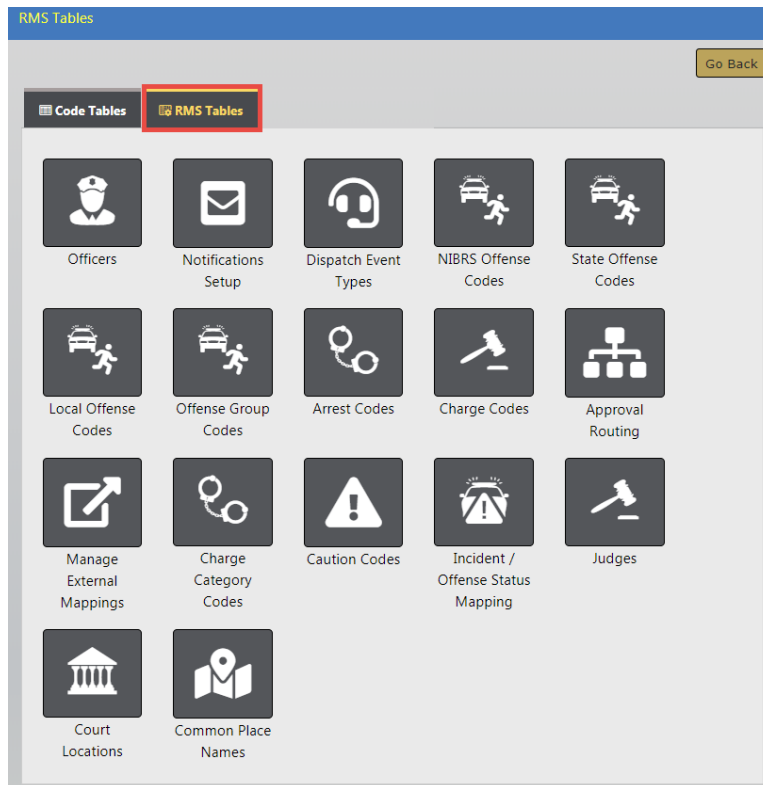
CODE	DESCRIPTION	SCREEN PROMPT	ACTIVE	SYSTEM REQUIRED
ARIES	ARIES Accident Report		<input checked="" type="checkbox"/>	N
ACC	Accident		<input checked="" type="checkbox"/>	N

NOTES

- Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Tables* page.

## RM S Tables

From the *Tables* page, click the **RMS Tables** tab to display the *Tables* page. For details on how to access the Tables page refer to "Access Tables" on page 177.



Each icon on this page provides links to an **RMS Table**.

**Note:** Links are permission-based, so the list varies by user. If you do not see a particular link on the **RMS Tables** tab, it is likely because your user account is not configured to access that item.

- The Officer link displays the *Officers* table. "Officers" on page 184 for information and instructions.
- The Dispatch Event Types link displays the *Dispatch Event Types* table. "Dispatch Event Types" on page 187 for information and instructions.
- The NIBRS Offense Codes link displays the *NIBRS Codes* table. "NIBRS Codes" on page 189 for information and instructions. (National Incident Based Reporting System (NIBRS) is an incident-based reporting system for crimes.)

- The [State Offense Codes](#) link displays the *State Offense Codes* table. "State Offense Codes" on page 191 for information and instructions.
- The [Local Offense Codes](#) link displays the *Local Offense Codes* table. "Local Offense Codes" on page 194 for information and instructions.
- The [Offense Group Codes](#) link display the *Offense Group Codes* table. See "Offense Group" on page 197 for information and instructions.
- The [Arrest Codes](#) link displays the *Arrest Charge Codes* table. "Arrest Charge Codes" on page 199 for information and instructions.
- The [Charge Codes](#) link displays the *Charge Codes* table. "Charge Codes" on page 202 for information and instructions.
- The [Charge Category Codes](#) link displays the *Charge Categories* table. See "Charge Categories" on page 207 for information and instructions.
- The [Caution Codes](#) link displays the *Caution Codes* table. See "Caution Codes" on page 209 for information and instructions.
- The [Incident Status / Offense Status Mapping](#) link displays the *Incident Status/Offense Status Mapping* table. See "Incident Status/Offense Status Mapping" on page 216 for information and instructions.
- The [Judges](#) link display the *Judges* table. See "Judges" on page 221 for information and instructions.
- The [Court Locations](#) link displays the *Court locations* table. See "Court Locations" on page 218 for information and instructions.
- The [Common Place Name](#) link displays the *Common Place Names* table. See "Common Place Names" on page 223 for information and instructions.
- The [Approval Routing](#) link displays the *Approval Routes* table. "Approval Routes" on page 228 for information and instructions.
- The [Manage External Mappings](#) link displays the *Mapping Types* table. "Mapping Types" on page 232
- The [Notifications Setup](#) link displays the *Notification Types* table. "Notification Types" on page 225 for information and instructions.

## Officers

From the **RMS Tables** tab of the *Tables* page, click the Officer link to display the *Officers* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 177.

RMS Tables / Officers

Go Back

Add Officer

Show 50 entries

Search:

Last Name	First Name	Middle Name	Title	User Id	Badge #	Actions
Admin	County				123	<div><div></div><div></div></div>
Avery	Peter (off)	T	Officer		205	<div><div></div><div></div></div>
Collins	timmy				997	<div><div></div><div></div></div>
Dude	Det			SA_CID	SA_CID	<div><div></div><div></div></div>
Evidence2	Employee				654321	<div><div></div><div></div></div>
Friday	Joe	A		C_ADMIN	11122	<div><div></div><div></div></div>
Gordmanson	Christian (osuper)	Fred			200	<div><div></div><div></div></div>
Gordmanson	Christian (osuper)	H			70	<div><div></div><div></div></div>
Gordmanson	Christopher	Fred			80	<div><div></div><div></div></div>
Gordmanson2	Christian (osuper)				90	<div><div></div><div></div></div>
Gumbrell	Terry (cid super)	H	CID Supervisor	STATE_CIDSUP1	10	<div><div></div><div></div></div>

### Export Officer List to Excel

You can export the contents of the Officer Table to Excel. Click on the **Export All To Excel** button to download the Excel file to your local machine.

### Search Officers

Use the following procedure to search the *Officers* table.

1. Click in the **Search** text field and type in a keyword.
2. The search results automatically return records where data matches the text you typed in the Search field.

Go Back Add Officer Export All To Excel

Show 50 entries

Search: officer

Last Name	First Name	Middle Name	Title	User Id	Badge #	Actions
Hanover	Jeff		Officer Supervisor	STATE_OSUPER8	96965	
Hedges	Joe		Officer		7049	
Officer	Dispatch				88888	
Officer	Test			OFFICER_TEST	1234	
OfficerTest	TestNewOfficer	New	DeleteMe		123456789	
Sunsonsen	Officer				68249	
TempOfficerLN	TempOfficer				887456985	
TestOfficerLN2	TestOfficer2				654321987741258	
Wright	Greg	QA	SERGEANT-CAPTAIN-WIN	STATE_OFFICER11	9696	

Showing 1 to 9 of 9 entries (filtered from 31 total entries)

Previous 1 Next

Go Back

## Add an Officer

Use the following procedure to add an officer record to the *Officers* table.

1. Click the **Add Officer** button in the upper right corner of the *Officers* table to display an *Officer Information* tab.

Go Back

**Officer Information**

**Officer Information**


FIRST NAME	AGENCY
<input type="text"/>	ANGTESTAGENCY
MIDDLE NAME	BADGE #
<input type="text"/>	<input type="text"/>
LAST NAME	DISPATCH ID
<input type="text"/>	<input type="text"/>
SUFFIX	CAD BADGE
<input type="text"/>	<input type="text"/>
TITLE	JOB STATUS
<input type="text"/>	<input type="checkbox"/> PATROL <input type="checkbox"/> DETECTIVE <input type="checkbox"/> ACTIVE

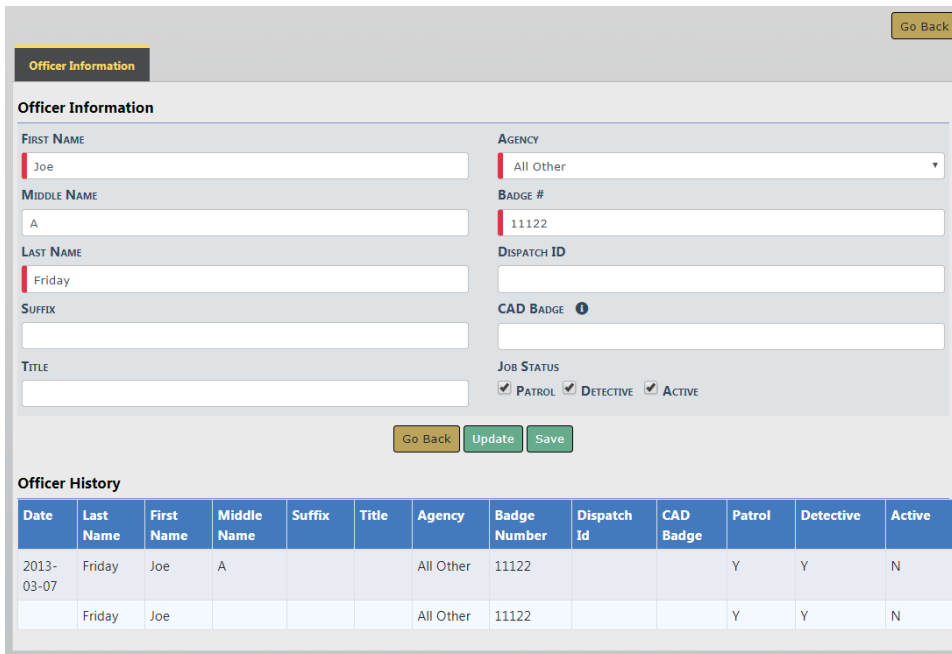
Go Back Save

2. Complete all required fields and optional fields as applicable.
3. Click all **Job Status** check boxes that apply to this officer.
4. Click **Save** to save the record and return to the *Officers* table.

## Edit an Officer

Use the following procedure to edit an officer record in the *Officers* table.

1. Locate the officer record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Officer* page as shown.



**Officer Information**

FIRST NAME: Joe

MIDDLE NAME: A

LAST NAME: Friday

SUFFIX:

TITLE:

AGENCY: All Other

BADGE #: 11122

DISPATCH ID:

CAD BADGE:

JOB STATUS: ☒ PATROL ☒ DETECTIVE ☒ ACTIVE

Go Back Update Save

**Officer History**

Date	Last Name	First Name	Middle Name	Suffix	Title	Agency	Badge Number	Dispatch Id	CAD Badge	Patrol	Detective	Active
2013-03-07	Friday	Joe	A			All Other	11122			Y	Y	N
	Friday	Joe				All Other	11122			Y	Y	N

**Officer History** appears on the bottom portion of the screen showing updates that have occurred to that particular record. Officer History does not appear if updates to the record have not yet occurred.


3. Make changes as needed, clicking **Save** as needed to prevent loss of changes.
4. When changes are complete, click **Update** to save the record and return to the *Officers* table.

## Delete an Officer

Use the following procedure to delete an officer record from the *Officers* table.







1. Locate the officer record you need to delete from the table.



- Click  in the **Actions** column in the same row as the record listing to display the confirm deletion prompt.
- Confirm deletion and return to the *Officers* table.

## Dispatch Event Types

From the **RMS Tables** tab of the *Tables* page, click the Dispatch Event Types link to display the *Dispatch Event Types* table. For details on how to access the *Tables* page refer to "Access Tables" on page 177.

Show 10 entries				Go Back	Add Event Type
Search:					
Code	Description	Active	Actions		
EMS	EMS	true			
FIRE	Fire	true			
POLICE	Police	true			
Showing 1 to 3 of 3 entries				Previous	1 Next

## Add a Dispatch Event Type

Use the following procedure to add a dispatch event type record to the *Dispatch Events Types* table.

- Click the **Add Event Type** button to display an *Add Event Type* prompt as shown.

Add Event Type

CODE

DESCRIPTION

ACTIVE  
☒


Cancel Save

- Click in the **Code** field and type a code for the new dispatch event type.

3. Click in the **Description** field and type a brief description of the new dispatch event type.
4. Leave the **Active** button checked.
5. Click **Save** to save the record and return to the *Dispatch Events Types* table, or click **Cancel** to return without saving.

### **Edit a Dispatch Event Type**

Use the following procedure to edit a dispatch event type record in the *Dispatch Event Types* table.

1. Locate the record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Add Event Type* prompt as shown with values in the fields and check box.

Edit Event Type

CODE

EMS

DESCRIPTION

EMS

ACTIVE

☒


Cancel

Save

3. Make changes as needed, then click **Save** to save the changes, and return to the *Dispatch Event Types* table.

























## Delete a Dispatch Event Type

Use the following procedure to delete a dispatch event type record from the *Dispatch Event Types* table.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Dispatch Event Types* table.

## NIBRS Codes

From the **RMS Tables** tab of the *Tables* page, click the NIBRS Codes link to display the *NIBRS Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 177.

NIBRS Codes					Go Back	+ Add NIBRS Code
Show	50	entries	Search:			
NIBRS Code ↓	Description	Offense Group	Crime Against	Actions		
90Z-S	All Other Offenses - Victim Types S	B	SOCIETY	 		
90Z-NON-S	All Other Offenses - Non-Society Victim	B	PERSON	 		
90Z-ILS	All Other Offenses - Victim Typs - ILS	B	SOCIETY	 		
90Z-IL	All Other Offenses - Victim Type - IL	B	PERSON	 		
90Z-GS	All Other Offenses - Victim Types GS	B	SOCIETY	 		
90Z-GILS	All Other Offenses - Victim Type - GILS	B	SOCIETY	 		
90Z-GIL	All Other Offenses - Victim Type - GIL	B	SOCIETY	 		
90Z-G	All Other Offenses - Victim Types G	B	SOCIETY	 		
90Z-EXCLUSIVE	All Other Offenses - Exclusive on Report	B	SOCIETY	 		
90Z	All Other Offenses	B	PERSON,SOCIETY	 		
90J	Trespass of Real Property	B	SOCIETY	 		
90I	Runaway	B	NOT A CRIME	 		

## Search NIBRS Codes

Use the following procedure to search the *NIBRS Codes* table.

1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

### Add a NIBRS Code

Use the following procedure to add a NIBRS code to the *NIBRS Codes* table.

1. Click the **Add NIBRS Code** button in the upper right corner of the *NIBRS Codes* table to display the *Add NIBRS Code* page.


The screenshot shows the 'Add NIBRS Code' form. It has a title bar 'NIBRS Code' with a 'Go Back' button. The form contains four main sections: 'CODE' with a text input field, 'OFFENSE GROUP' with a dropdown menu showing '-Select-', 'DESCRIPTION' with a text input field, and 'DETAILED DESCRIPTION' with a larger text area. Below these is a 'CRIME TARGETS' section with a 'Click To Select' button. At the bottom are 'Go Back' and 'Save' buttons.

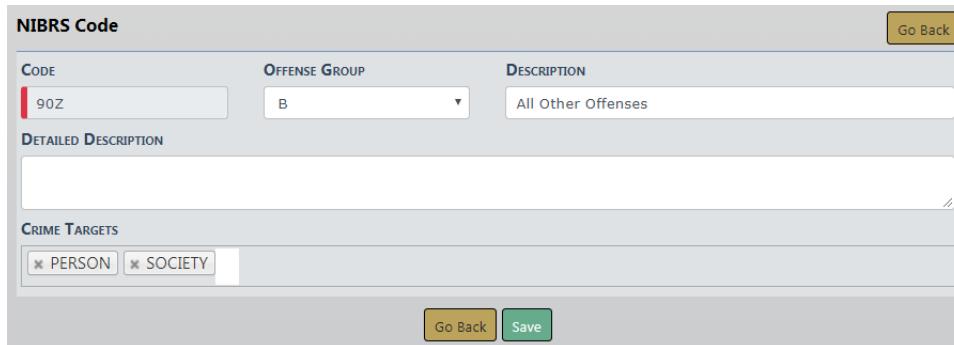
2. Click in the **Code** field (required) and type in a code.
3. Select an **Offense Group**, if applicable.
4. Click in the **Description** field and type a brief description of the code.
5. Click in the **Detailed Description** field and type a long description, if applicable.
6. Click in the **Crime Targets** field and choose one or more options from the list.
7. Click **Save** to save the record and return to the *NIBRS Codes* table.

### Edit a NIBRS Code

Use the following procedure to edit a NIBRS code to the *NIBRS Codes* table.

1. Locate the NIBRS code record you need to edit in the table.


2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Officer* page as shown.



3. Make changes as needed.
4. Click **Save**. A successful save message briefly appears at the top of the page.
5. Click **Go Back** to return to the *Officers* table.

### Delete a NIBRS Code

Use the following procedure to delete a NIBRS code from the *NIBRS Codes* table.











1. Locate the NIBRS code record you need to delete from the table.
2. Click  in the **Actions** column.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *NIBRS Codes* table.

### State Offense Codes

From the **RMS Tables** tab of the *Tables* page, click the State Offense Codes link to display the *State Offense Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 177.

Go Back Add State Code

Show 10 entries Search:

State Offense Code	NIBRS Code	Description	Status	Actions
10-14-3-29.5	90Z - All Other Offenses	Public Safety- Violation Of Local Travel...	Inactive	 
11-8-8-15	90Z - All Other Offenses	CORRECTION- SEX OFFENDER FAIL TO POSSESS...	Active	 
11-8-8-17	90Z - All Other Offenses	Correction- Sex Offender Registration Vi...	Active	 
11-8-8-18	90Z - All Other Offenses	Correction- Sexual Violent Predator Duty...	Active	 
1111555	90Z - All Other Offenses	Test	Active	 

## Search State Offense Codes

Use the following procedure to search the *State Offense Codes* table.

1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

## Add a State Offense Code

Use the following procedure to add a state offense code to the *State Offense Codes* table.

1. Click **Add State Code** button in the upper right corner of the *State Offense Codes* table to display an *Add State Offense Code* page as shown below.

State Code Go Back

STATE OFFENSE CODE NIBRS CODE DESCRIPTION

-Select-

DETAILED DESCRIPTION ⓘ

ACTIVE IBR CODE ARREST CODES

☒

OFFENSE GROUPS

Click To Select

INCIDENT TYPE

Click To Select

Go Back Save


2. Complete all required fields and applicable optional fields.
3. Leave the **Active** button checked.
4. Enter the **IBR Code**.
5. Optionally, select the **Offense Groups**.
6. Optionally, select the **Incident Type** to relate incident types to offenses.

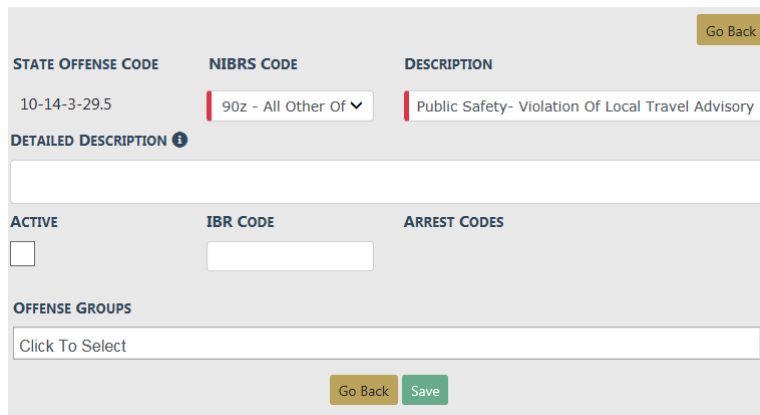
Relating one or more Incident Types to an offense requires at least one related offense on the Incident Report when that Incident Type is added to an Incident Report.

7. Click **Save** to save the record and return to the *State Offense Codes* table.

### **Edit a State Offense Code**

Use the following procedure to edit a state offense code in the *State Offense Codes* table.

1. Locate the state offense code you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit State Offense Code* page as shown.




The screenshot shows the 'Edit State Offense Code' form. At the top right is a 'Go Back' button. The form has three main sections: 'STATE OFFENSE CODE' with the value '10-14-3-29.5', 'NIBRS CODE' with a dropdown menu showing '90z - All Other Of', and 'DESCRIPTION' with the text 'Public Safety- Violation Of Local Travel Advisory'. Below these is a 'DETAILED DESCRIPTION' section with a text input field. Further down are three sections: 'ACTIVE' with a checked checkbox, 'IBR CODE' with an empty text input field, and 'ARREST CODES' which is empty. At the bottom is an 'OFFENSE GROUPS' section with a dropdown menu showing 'Click To Select'. At the very bottom are 'Go Back' and 'Save' buttons.

3. Make changes as needed.
4. When changes are complete, click **Save** to save the record and return to the *State Offense Codes* table.

## Delete a State Offense Code

Use the following procedure to delete a state offense code from the *State Offense Codes* table.

1. Locate the code you need to delete from the table.
2. Click  in the **Actions** column.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *State Offense Codes* table.

## Local Offense Codes

From the **RMS Tables** tab of the *Tables* page, click the Local Offense Codes link to display the *Local Offense Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 177.

Show <input type="text" value="10"/> entries <span>Go Back</span> <span>+ Add Local Offense Code</span> <span>Print</span>					
Search: <input type="text"/>					
Local Offense	Description	State Offense	NIBRS Code	Status	Actions
0001	Ordinance Violation - Disorderly Conduct			Inactive	 
1111555	Test			Inactive	 
12333	Local Offense - Failure to Register			Active	 
6.2.106.A :M: 1350	Homicide Criminally Negligent Manner	35-42-1-1 M01	09A	Inactive	 
ANG TEST	Ang Test			Active	 
IA-32644	Testing			Inactive	 
REGION 2 LOCAL OFFENSE TEST	Region 2 Local Offense Test			Active	 
TEST LOCAL OFFENSE	Test Offense Description	10-14-3-29.5	90Z	Active	 
TESTING123	Testing123	9-21-8-52A	90Z	Inactive	 
Showing 1 to 9 of 9 entries				Previous	1 Next

## Search Local Offense Codes

Use the following procedure to search the *Local Offense Codes* table.

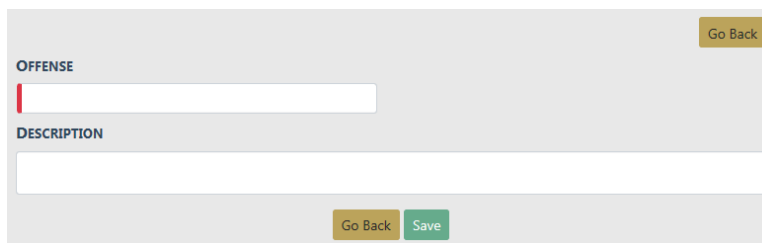


1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

### ***Add a Local Offense Code***

Use the following procedure to add a local offense code to the *Local Offense Codes* table.


1. Click the **Add Local Offense Code** button to display the *Add Local Offense Code* page as shown below.



2. Complete fields.
3. Click **Save** to save the record and return to the *Local Offense Codes* table.

### ***Edit a Local Offense Code***

Use the following procedure to edit a local offense code in the *Local Offense Codes* table.

1. Locate the code you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Local Offense Code* page as shown.

**Local Offense Code** Go Back

OFFENSE: 0001 REQUIRE APPROVAL: ☐

AGENCY: County of Mark

DESCRIPTION: Ordinance Violation - Disorderly Conduct

STATE OFFENSE: 11-8-8-15 - CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION

NIBRS CODE: 90Z - All Other Offenses

STATUS: Inactive


ARREST CODES

Go Back Save

3. Make changes as needed.
4. Click **Save** to save changes and return to the *Local Offense Codes* table.

### Delete a Local Offense Code

Use the following procedure to delete a local offense code from the *Local Offense Codes* table.













1. Locate the code you need to delete from the table.
2. Click  in the **Actions** column to display a confirmation prompt.

**Note:** A confirmation prompt displays only if the code is not associated with an incident report. Otherwise, the following message displays: This offense cannot be removed because it is associated with one or more incident reports. You may edit this offense and set it to inactive. To inactivate the code, access the *Edit Local Offense Code* page and select **Inactive** from the drop-down menu in the **Status** field, then click **Save**.

3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Local Offense Codes* table.

## Offense Group

From the **RMS Tables** tab of the *Tables* page, click the Offense Group Code link to display the *Offense Group Codes* table. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).

Offense Groups				Go Back	+ Add Offense Group
Show 50 entries		Search:			
Group ID	Group Name	Agency Code	Actions		
9	TEST GROUP	All Agencies	 		
8	TEST GROUP	All Agencies	 		
5	GROUP NAME 1	D13	 		
3	TEST_BURGDUP	D42	 		
2	TEST_BURGDUP	D42	 		
1	TEST_BURGLARY	D42	 		
Showing 1 to 6 of 6 entries				Previous	1 Next

### Search Offense Groups

Use the following procedure to search the *Offense Groups* table.

1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

### Add an Offense Group

Use the following procedure to add an offense group to the *Offense Groups* table.

1. Click the **Add Offense Group** button to display the *Add Offense Group* page as shown below.


Offense Group

**GROUP NAME**

**AGENCY**

All Agencies ▼

**OFFENSE CODE**




**SELECTED OFFENSES**

Cancel Save

2. Complete fields.
3. Click **Save** to save the record and return to the *Offense Groups* table.

### ***Edit a Local Offense Code***

Use the following procedure to edit an offense group code in the *Offense Groups* table.

1. Locate the code you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Offense Group* page as shown.

Offense Group

**GROUP NAME**

TEST GROUP

**AGENCY**

All Agencies

**OFFENSE CODE**

**SELECTED OFFENSES**

HUMAN SERVICES- FALSE STATEMENT FOR PUBLIC BENEF  
ANG TEST CODE  
Ang Test Off Code


Cancel

Save

3. Make changes as needed.
4. Click **Save** to save changes and return to the *Offense Groups* table.

### Delete a Local Offense Code

Use the following procedure to delete an offense group from the *Offense Groups* table.

1. Locate the code you need to delete from the table.
2. Click  in the **Actions** column.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion.

## Arrest Charge Codes

From the **RMS Tables** tab of the *Tables* page, click the [Arrest Codes](#) link to display the *Arrest Charge Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 177.

Show 10 entries
Go Back Add Arrest Code

Search:

Arrest Code	Description	State Offense	Active	Actions
10-14-3-29.5	PUBLIC SAFETY- VIOLATION OF LOCAL TRAVEL ADVISORY DESIGNATIONS	10-14-3-29.5	Y	
11-8-8-15	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15	N	
11-8-8-17	CORRECTION- SEX OFFENDER REGISTRATION VIOLATION	11-8-8-17	Y	
11-8-8-18	CORRECTION- SEXUAL VIOLENT PREDATOR DUTY TO NOTIFY VIOLATION	11-8-8-18	Y	
1111555	Test	1111555	N	
12-32-1-7	HUMAN SERVICES- FALSE STATEMENT FOR PUBLIC BENEFITS	12-32-1-7	Y	
12333	Local Offense - Failure to Register	12333	Y	
13-30-10-5	ENVIRONMENT- UNDERGROUND STORAGE TANK VIOLATIONS	13-30-10-5	Y	
13-30-10-6	ENVIRONMENT- STATE REGULATED WETLAND LAW VIOLATIONS	13-30-10-6	Y	
13-30-2-1	ENVIRONMENT- ENVIRONMENTAL ACT VIOLATIONS	13-30-2-1	Y	

Showing 1 to 10 of 968 entries
Previous 1 2 3 4 5 ... 97 Next

## Search Arrest Charge Codes

Use the following procedure to search the *Arrest Charge Codes* table.

1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

## Add an Arrest Charge Code

Use the following procedure to add an arrest charge code to the *Arrest Charge Codes* table.

1. Click the **Add Arrest Code** button in the upper right corner of the *Arrest Charge Codes* table to display an *Add Arrest Charge Code* page as shown below.

Go Back

ARREST CODE

ACTIVE ☒

WARRANT MODULE ☒ Click info bubble for a definition of this button

CODE DESCRIPTION

STATE OFFENSE


-Select-

Go Back Save

2. Complete required fields and applicable optional fields. Any field with a red left-hand border is a required field. You must complete required fields to continue.
3. Select the Warrant Module button to allow this arrest code to be used in the Warrant module. The button is green when selected, or gray when deselected.
4. Click **Save** to save the record and return to the *Arrest Charge Codes* table.

### Edit an Arrest Charge Code

Use the following procedure to edit an arrest charge code in the *Arrest Charge Codes* table.

1. Locate the arrest charge code you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Arrest Charge Code* page as shown.

Go Back

ARREST CODE

10-14-3-29.5

ACTIVE ☒

WARRANT MODULE ☐

CODE DESCRIPTION

PUBLIC SAFETY- VIOLATION OF LOCAL TRAVEL ADVISORY DESIGNATIONS

STATE OFFENSE


-Select-

Go Back Save

3. Make changes as needed.
4. Click **Save** to save the record and return to the *Arrest Charge Codes* table.

## Delete an Arrest Charge Code

Use the following procedure to delete an arrest charge code from the *Arrest Charge Codes* table.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column.
3. Click **Yes** to confirm deletion, or click **No** to return to the *Arrest Charge Codes* table without deleting.

## Charge Codes

From the **RMS Tables** tab of the *Tables* page, click the Charge Codes link to display the *Charge Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 177.

Go Back

Add Charge Code

Manage Charging Language Templates

Enter search text

Reset

Search

Charge Code	Charge Description	Offense Code	Statute	Category	Class	Display	Actions
10-14-3-29.5	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15	11-8-8-15	Misdemeanor	Class 1 Misdemeanor	Y	<div></div> <div></div>
11-8-8-15	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15	11-8-8-15	Misdemeanor	Class 1 Misdemeanor	Y	<div></div> <div></div>
11-8-8-17	CORRECTION- SEX OFFENDER REGISTRATION VIOLATION	11-8-8-17	11-8-8-17	Misdemeanor	Class 1 Misdemeanor	Y	<div></div> <div></div>
11-8-8-18	CORRECTION- SEXUAL VIOLENT PREDATOR DUTY TO NOTIFY VIOLATION	11-8-8-18	11-8-8-18	Misdemeanor	Class 1 Misdemeanor	Y	<div></div> <div></div>
12-32-1-7	HUMAN SERVICES- FALSE STATEMENT FOR PUBLIC BENEFITS	12-32-1-7	12-32-1-7	Misdemeanor	Class 1 Misdemeanor	Y	<div></div> <div></div>

## Search Charge Codes

Use the following procedure to search the *Charge Codes* table.

1. Type a keyword in the **Search** text box in the upper right of the form.
2. Click **Search** to redisplay the table with the search results that match your entered text.



## Add a Charge Code

Use the following procedure to add a charge code to the *Charge Codes* table.

1. Click the **Add Charge Code** button in the upper right of the *Charge Codes* table to display a *Add Charge Code* page as shown below.


2. Complete all required fields and any applicable optional fields.
3. Check all boxes that apply to this charge code.

**Note:** The **Display** check box must be checked for the charge code to display throughout areas of Online RMS where charge codes pulled-in.

4. Click **Save** to save the record and return to the *Charge Codes* table.

## Edit a Charge Code


Use the following procedure to edit a charge code in the *Charge Codes* table.

1. Locate the record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Charge Code* page.
3. Make changes as needed.
4. Click **Save** to save changes and return to the *Charge Codes* table.

### **Delete a Charge Code**

Use the following procedure to delete a charge code from the *Charge Codes* table. You can delete a charge code when it has not yet been used anywhere in Online RMS.

**Note:** You cannot delete a charge code that has been used in Online RMS. To disable the charge code, uncheck the **Display** check box.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing. If the delete icon is not available to you, then you are not able to delete the charge code. To disable the charge code, uncheck the **Display** check box.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Charge Codes* table.

### **Manage Charging Language Templates**

Use the following procedure to manage charging language templates.

**Note:** You must have appropriate permissions to perform this function.

1. Click the **Manage Charging Language Templates** button in the upper right corner of the *Charge Codes* table to display a *Charging Language Templates* page as shown below.

Charging Language Templates			Go Back	Add Template
Show 10 entries			Search:	
Name	Charges	Actions		
Assault	35-42-2-1 B03 BATTERY- CHILD ,35-42-2-1 B08 BATTERY- PHYSICAL - Charge Code			

Showing 1 to 1 of 1 entries

Previous 1 Next

## Add Template

1. Click the **Add Template** button to open the *Add Charging Language Template* form.

**Add Charging Language Template** Go Back

TEMPLATE NAME

Rich text editor toolbar: ABC, Cut, Copy, Paste, Undo, Redo, Find, Replace, Link, Unlink, Table, Bulleted List, Numbered List, Indent, Outdent, Styles, Format, Size, Font Color, Background Color, Line Height.


body

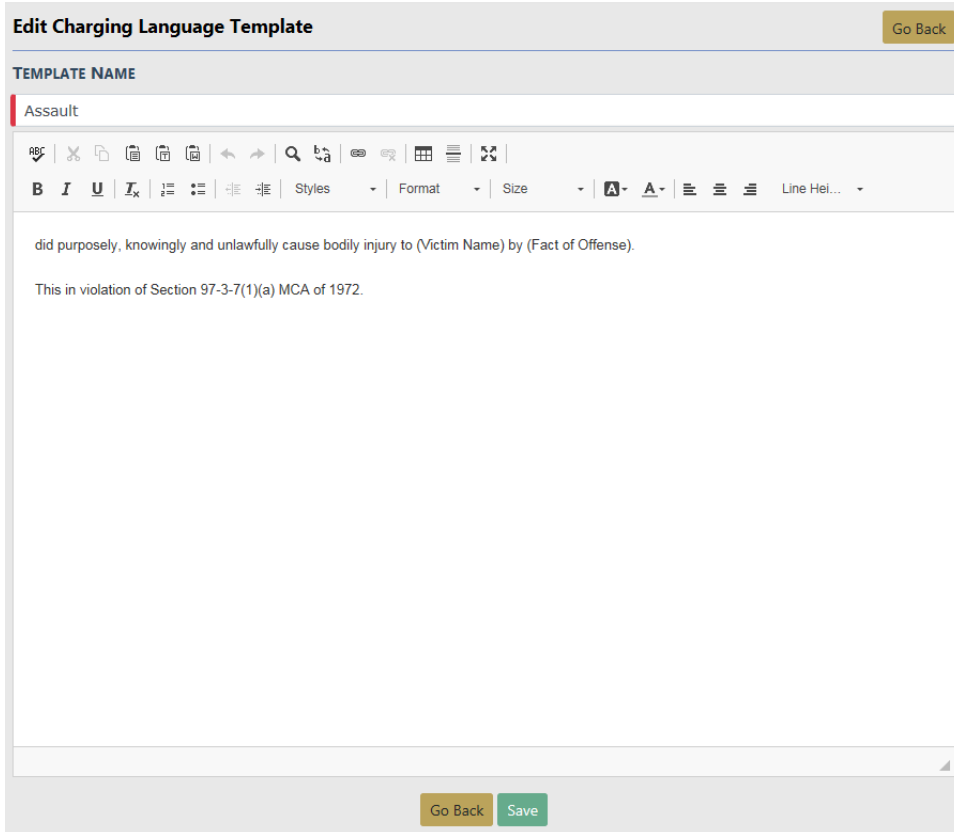
Go Back Save

2. Enter a unique **Template Name**.
3. Enter text into the body area of the template, optionally using the standard formatting options.
4. Click **Save** to create the template and return to *Charging Language Template*.

## Edit a Charging Language Template

Use the following procedure to edit a Charging Language Template.


1. Locate the record you need to edit.
2. Click  in the **Actions** column to open the *Edit Charging Language Template*.



3. Make changes as needed.
4. Click **Save** to save changes and return to *Charging Language Templates*.

### Delete a Charging Language Template









Use the following procedure to delete a charging language template.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing. If you do not see the delete icon, then you do not have the ability to delete.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Charging Language Template*.
4. Click **Go Back** to return to the *Charge Codes* table.

## Charge Categories

The **Charge Categories** page allows you to manage the Default Bond Type, Amount, and Active setting for Charge Categories. **Charge Categories** are associated to Charge Codes and display on the *Field Arrest* and *Warrant Charges* pages.

From the **RMS Tables** tab of the *Tables* page, click the Charge Category Codes link to display the *Charge Categories* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 177.

Show 10 entries		Go Back Add Charge Category		Search:	
Code	Description	Classes	Active	Actions	
C	Civil	Class:Infraction Bond Type: Bond on Companion Case Bond Amount: \$500	Yes	 	
DT	Delinquency	Class:Class C Misdemeanor	Yes	 	
F	Felony	Class:Class 1 Felony Bond Type: Drivers license Bond Amount: \$666	Yes	 	
		Class:Class 2 Felony			
		Class:Class 3 Felony Bond Type: Bond on Companion Case Bond Amount: \$150			
		Class:Felony State			
		Class:Capital Felony			
M	Misdemeanor	Class:Variable Class Felony	Yes	 	
		Class:Class A Misdemeanor Bond Type: 25% Surety Bond (Bond Agent) Bond Amount: \$0			
		Class:Class B Misdemeanor			
		Class:Class C Misdemeanor			
		Class:Variable Class Misdemeanor			
		Class:Class 1 Misdemeanor Bond Type: Drivers license Bond Amount: \$6000			

### Add a Charge Category

Use the following procedure to add a charge category to the *Charge Categories* table.


1. Click the **Add Charge Category** button in the upper right corner of the *Charge Categories* table to display a *Add Charge Category* page, and click the Add Class link to add the Category Code.

RMS Tables / Charge Category Codes / Add Charge Category Code

**Charge Category Code** Go Back

CODE  DESCRIPTION  ACTIVE ☐

**Add Class**


Code	Description	Bond Type	Bond Amount	Active	Actions
<input type="text"/>	<input type="text"/>	-Select-	<input type="text"/>	<input type="checkbox"/>	

Save

2. Complete all required fields and any applicable optional fields.
3. Check the **Active** box on the top section of the form if applicable.
4. Check the **Active** box on the Class line items where applicable.
5. Click **Save** to save the record and return to the *Charge Categories* table.

### ***Edit a Charge Category***


Use the following procedure to edit a charge category in the *Charge Categories* table.

1. Locate the record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Charge Category* page.
3. Make changes as needed.
4. Click **Save** to save changes and return to the *Charge Categories* table.

### ***Delete a Charge Category***

Use the following procedure to delete a charge code from the *Charge Categories* table. You can delete a charge category when it has not yet been used anywhere in Online RMS.

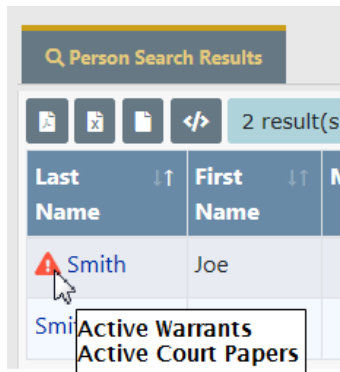
**Note:** You cannot delete a charge category that has been used in Online RMS. To disable the charge category, uncheck the **Active** check box.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing. If the delete icon is not available to you, then you are not able to delete the charge category. To disable the charge category, uncheck the **Action** check box.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Charge Categories* table.

## Caution Codes

The **Caution Codes** table provides a method to create and maintain a customized set of warnings that can be used on Master Person records to inform personnel, with access to Master Indices, of potential dangers or problems specific to those persons. Caution examples: Persons with active warrants, on probation, known to carry firearms, or suicidal tendencies.

A red Alert icon appears next to the person's name in the *Person Search Results* window, indicating active Caution Codes or Warrants. Hover your mouse over the Alert icon to view a summary of the all the active alerts, or click on the Alert icon to open details of all active alerts in a pop-up window.



Person Alerts

Person Details

LAST NAME Smith	FIRST NAME Joe	SEX Male	RACE White
ALIASES Bonb Joe Smith(Alias), John Smith(Alias)		CELL PHONE (555)-555-5555	E-MAIL Test@gmail.com
ADDRESS (RESIDENCE) 122 West Elm Street Chicago, IL 60610-0001		HEIGHT 5' 12"	WEIGHT 160
INDEX ID 2		EYE COLOR Black	

Active Warrants

Agency: Indiana State Police  
Issue Date: 06/18/2014 11:54  
Status: **Active**  
Bond Amount: \$0.00  
Charge: 35-43-1-1A - ARSON- VEHICLE

Index ID: 65  
Person: Smith, Joe  
Bond Type: 25% Surety Bond (Bond Agent)  
Reference #: sdfsdC(Docket #)

Active Court Papers

CP ID #	Type/Sub Type	Reference #s	Expiration Date	People/Organizations	Actions
53	Subpoena/Civil	Court Case Number: abc		<b>i</b>	
75	Civil Protection Order/Criminal	Court Case Number: 65165151		Joe Smith: Active	
78	Civil Protection Order/Criminal	Court Case Number: 111111111		<b>i</b>	
215	Subpoena/Civil	Case Prosecutor Number: 1A-34482		<b>i</b>	

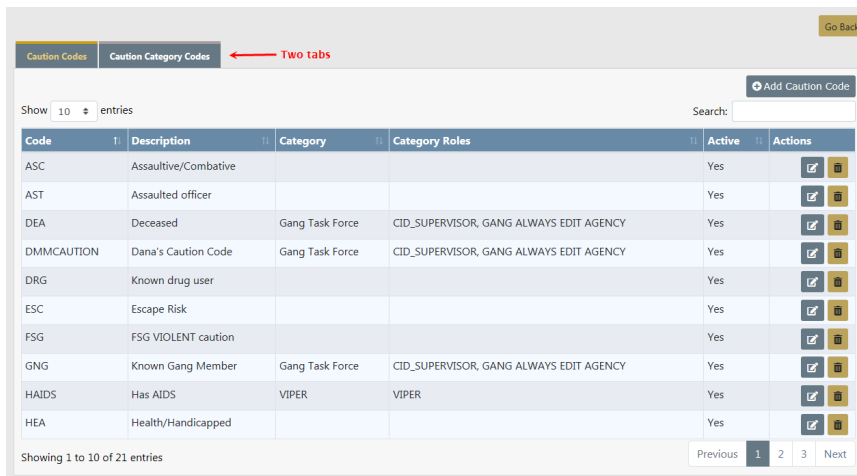
Close

You may also search person records by Caution Code and date range. Refer to the *Caliber Public Safety Online RMS User Guide* for details.

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

From the **RMS Tables** tab of the *Tables* page, click the Caution Codes link to display the *Caution Codes* table. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).





Go Back

Caution Codes Caution Category Codes ← Two Tabs

Show 10 entries Search: Add Caution Code

Code	Description	Category	Category Roles	Active	Actions
ASC	Assaultive/Combative			Yes	
AST	Assaulted officer			Yes	
DEA	Deceased	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
DMMCAUTION	Dana's Caution Code	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
DRG	Known drug user			Yes	
ESC	Escape Risk			Yes	
FSG	FSG VIOLENT caution			Yes	
GNG	Known Gang Member	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
HAIDS	Has AIDS	VIPER	VIPER	Yes	
HEA	Health/Handicapped			Yes	

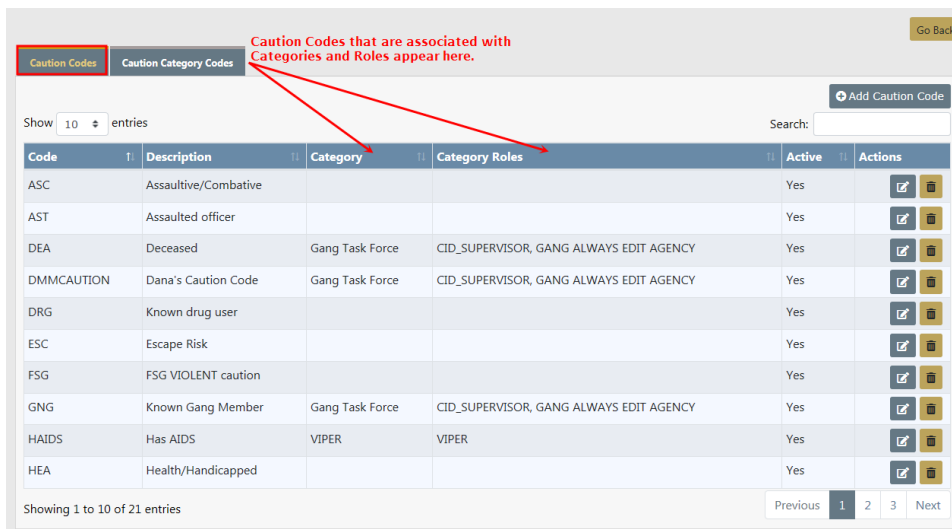
Showing 1 to 10 of 21 entries Previous 1 2 3 Next

Two tabs are associated with the **Caution Codes** page: *Caution Codes* and *Caution Category Codes*.

### Caution Codes Tab

The *Caution Codes* tab lists the Category Codes and associated Caution Category Codes and Roles, if any.

**Note:** Caution Category Codes are optional. Refer to the "Caution Category Codes Tab" on page 214 section for more information.



Go Back

Caution Codes Caution Category Codes



Caution Codes that are associated with Categories and Roles appear here.

Show 10 entries Search: Add Caution Code

Code	Description	Category	Category Roles	Active	Actions
ASC	Assaultive/Combative			Yes	
AST	Assaulted officer			Yes	
DEA	Deceased	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
DMMCAUTION	Dana's Caution Code	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
DRG	Known drug user			Yes	
ESC	Escape Risk			Yes	
FSG	FSG VIOLENT caution			Yes	
GNG	Known Gang Member	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
HAIDS	Has AIDS	VIPER	VIPER	Yes	
HEA	Health/Handicapped			Yes	

Showing 1 to 10 of 21 entries Previous 1 2 3 Next

Associating a Category Code and Role to a Caution Code allows designated users exclusive access to administer the Category Code on a person record.

Category Code	Description	Category Roles	Active	Actions
GTF	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	 

Only users with these roles can add, edit, or delete this caution code on the person record, while all other users can only view the code.

**Note:** If a Caution Category Role is not associated with a Role, or a Caution Category Code is not associated with a Caution category, then every user has access.

### Add Caution Codes

Use the following procedure to add a caution code to the *Caution Codes* tab of the Caution Codes table.

1. Click the **Add Caution Code** button in the upper right corner of the *Caution Codes* table to display a *New Caution Code* page.

New Caution Code

CODE

DESCRIPTION

ACTIVE

☒

CATEGORY

-Select-

CAN DUPLICATE

☐

Close

Save


2. Complete all required fields.
3. Optionally select a **Category** from the list. Categories are defined under the *Caution Category Codes* tab.

**Note:** Refer to the "Caution Category Codes Tab" on page 214 section for more information.

4. Select all buttons that apply to this caution code. Green buttons are active and gray buttons are inactive.
5. Click **Save** to save the record and return to the *Caution Codes* table.

### Edit Caution Codes

Use the following procedure to edit a caution code in the *Caution Codes* table.

1. Locate the record you need to edit.
2. Click  in the **Actions** column in the same row as the record to display the *Edit Caution Code* page.

Edit Caution Code

**CODE**

ASC

**DESCRIPTION**

Assaultive/Combative

**ACTIVE**

☒

**CATEGORY**

Gang Task Force

**CAN DUPLICATE**

☒


Close

Save

3. Make changes as needed.
4. Click **Save** to save changes and return to the *Caution Codes* table.

### Delete Caution Codes

Use the following procedure to delete a caution code from the *Caution Codes* table.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Caution Codes* table.

## Caution Category Codes Tab

**Caution Category Codes** group similar Caution Codes and control who has access to administer the Caution Code by the Category Roles based on User Roles.

**Note:** It is not unusual to create new User Role(s) for Caution Code administration purposes. Refer to "Roles" on page 77 for more information on Roles.

Caution Categories are optional. You can have a few or as many that makes sense for your agency.

Go Back

Caution Codes **Caution Category Codes**

➕ Add Category Code

Show 10 entries Search:

Category Code	Description	Category Roles	Active	Actions
GTF	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
VIP	VIPER	VIPER	Yes	

Showing 1 to 2 of 2 entries

Previous 1 Next

### Add Caution Category Codes

Use the following procedure to add a Caution Category Code to the *Caution Category Codes* tab of the Caution Codes table.

1. Click the **Add Category Code** button in the upper right corner of the *Caution Category Codes* tab to display a *New Category Code* page.

New Category Code

**CODE**  
GIF

**DESCRIPTION**  
Gang Task Force

**ACTIVE**  
☒


**ROLES**  
CID\_SUPERVISOR GANG ALWAYS EDIT AGENCY

Close Save

2. Complete all required fields.
3. The **Active** box is checked by default.
4. Click in the **Roles** field and select one or more from the list to associate to the **Category Code**.
5. Click **Save** to save the record and return to the *Caution Category Codes* tab.

### Edit Caution Category Codes

Use the following procedure to edit a charge code in the *Caution Category Codes* tab of the Caution Codes table.

1. Locate the record you need to edit.
2. Click  in the **Actions** column in the same row as the record to display the *Edit Caution Category Code* page.

Edit Category Code

**CODE**

VIP

**DESCRIPTION**

VIPER

**ACTIVE**

☒

**ROLES**


x VIPER

Close Save

3. Make changes as needed.
4. To remove a Role, click on the **X** on the left of that Role.
5. Click **Save** to save changes and return to the *Caution Category Codes* tab.

### Delete Caution Codes

Use the following procedure to delete a caution code from the *Caution Codes* table.





















1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Caution Category Codes* tab.

## Incident Status/Offense Status Mapping

The **Incident Status / Offense Status Mapping** page allows *Incident Status* codes to be mapped to *Offense Status* codes to prevent mismatches.

During the approval process, if the user sets an *Incident Status* to something other than what has been mapped to an *Offense Status*, an error displays disallowing that selection and prompts them to verify the information and make any necessary changes.

From the **RMS Tables** tab of the *Tables* page, click the [Incident Status/Offense Status Mapping](#) link/icon to display the *Mappings* table. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).

Incident Status / Offense Status Mapping			
Show 50 entries		Search:	
Incident Code	Incident/Case Status	Offense Status(es)	Actions
00	Open	00: Open/Pending	 
02	Cleared by Arrest	02: Cleared by Arrest	 
07	Other Enforcement Action	07: Other Enforcement Action 16: Open Pending Destruction Of Property	 
10	Cleared Exceptionally By Death Of Offender	10: Cleared Exceptionally By Death of Offender	 
11	Cleared Exceptionally - Prosecution Declined, No Complaint Filed	11: CLEARED EXCEPTIONALLY - PROSECUTION DECLINED, NO COMPLAINT FILED	 
12	Cleared Exceptionally - Extradition Denied	12: CLEARED EXCEPTIONALLY - EXTRADITION DENIED	 
13	Cleared Exceptionally - Victim Refused To Cooperate	13: CLEARED EXCEPTIONALLY - VICTIM REFUSED TO COOPERATE	 
14	Cleared Exceptionally - Juvenile No Custody	10: Cleared Exceptionally By Death of Offender 11: CLEARED EXCEPTIONALLY - PROSECUTION DECLINED, NO COMPLAINT FILED 12: CLEARED EXCEPTIONALLY - EXTRADITION DENIED 13: CLEARED EXCEPTIONALLY - VICTIM REFUSED TO COOPERATE 14: CLEARED EXCEPTIONALLY - JUVENILE NO CUSTODY	 
22	Closed - Unfounded	05: Closed	 
30	Cleared by Citation	07: Other Enforcement Action	 
Showing 1 to 10 of 10 entries			
		Previous 1 Next	

### Add Incident and Offense Status Mapping

1. Click the **Add Incident Mapping** button in the upper right corner of the *Mappings* table to display an *Incident Mapping* page.

Incident Mapping

INCIDENT STATUS CODE  
01 : Warrant Request Approved


OFFENSE CODES  
01: Warrant Request 07: Other Enforcement Action

Close Save

2. Select an **Incident Code** from the list.
3. Select one or more **Offense Codes**.
4. Click **Save** to save the record and return to the *Mappings* table.

### Edit Incident and Offense Status Mapping

1. Locate the record you need to edit.

- Click  in the **Actions** column in the same row as the record to display the *Incident Mapping* page.



Incident Mapping

INCIDENT STATUS CODE

Other Enforcement Action


OFFENSE CODES

✖ 07: Other Enforcement Action ✖ 16: Open Pending Destruction Of Property

Close Save

- Make changes as needed.
- Click **Save** to save changes and return to the *Mappings* table.

### Delete Incident and Offense Status Mapping

- Locate the record you need to delete from the table.
- Click  in the **Actions** column in the same row as the record listing.
- If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Mappings* table.

## Court Locations

Agencies using the *Civil Process* and *Warrant* modules have the ability to manage Court Locations. Only agency administrators with proper permissions can add, edit, and delete *Court Locations*. The *Civil* and *Warrant* modules display the *Court Locations* as a list of values when adding court papers and warrants. You can only select a court location that appears in the list of values; as *Court Locations* change, the list of values from which to choose also automatically change.

There are up to three ways to access the *Court Locations* table, depending on your permission level:

- From the Main Menu select Administration, Module Admin, then Civil Process. For more information refer to "Civil Process Agency Settings" on page 292.
- From the Main Menu select Administration then Agencies. Find the appropriate agency from the listed agencies then click the edit link next to the agency name. For more information refer to the *Other Tables* section of "Agency Settings" on page 29.













- Click the [Court Locations](#) link on the **RMS Tables** tab of the *Tables* page to display the *Court Locations* table. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).

RMS Tables / Court Locations

Agency: District 42, Versailles

Show 50 entries

Search:

ID	Name	Address	Status	Court	Receiving Agency	Actions
1	Court Location 1 - Alternate Name	101 Webster St. Room #345 Bloomington Colorado 11111-2222	Active	true	true	 
2	DL Supreme Court - Judge Dredd	1776 Lincoln Street 390 Zang Street Denver -	Active	true	true	 
11	Judy's Court -	123 Judge Drive Courtopolis Colorado 12345-	Active	true	true	 
14	A'postrophe's Court -	123 A'postrophe Lane A'postrophe North Carolina 80012-	Active	true	true	 
23	New Court -	New Court Court Courtsville Colorado 11111-	Active	true	true	 

Follow the same procedure to add, edit, and delete *Court Locations*, regardless of which access option you use.

### Add Court Locations

Use the following procedure to add a court location to the *Court Locations* table.

- Click the **Add Court Location** button in the upper right corner of the *Court Locations* table to open a blank entry form.

Go Back

COURT NAME

ADDRESS 1

CITY

ZIP

JURISDICTION NAME

COMMENT

COURT NAME 2

ADDRESS 2

STATE

PHONE

JURISDICTION TYPE

COURT LOCATION

RECEIVED FROM AGENCY

ACTIVE

AFFIDAVIT FOOTER

Save


- Complete all required fields and optionally complete others.
- Check all boxes that apply. If you select Affidavit Footer, enter the appropriate information in the additional text box that appears below the buttons.

<b>COURT LOCATION</b> <input type="checkbox"/>	<b>RECEIVED FROM AGENCY</b> <input type="checkbox"/>	<b>ACTIVE</b> <input checked="" type="checkbox"/>	<b>AFFIDAVIT FOOTER</b> <input checked="" type="checkbox"/>
<b>AFFIDAVIT FOOTER TEXT</b> <div></div>			
<a href="#">Save</a>			

- Click **Save** to save the record and return to the *Court Locations* table.

### Edit Court Locations

Use the following procedure to edit a caution code in the *Court Locations* table.

- Locate the record you need to edit.
- Click  in the **Actions** column in the same row as the record to open the record for editing.


[Go Back](#)

<b>COURT NAME</b> DL Supreme Court	<b>COURT NAME 2</b> Judge Dredd
<b>ADDRESS 1</b> 1776 Lincoln Street	<b>ADDRESS 2</b> 390 Zang Street
<b>CITY</b> Denver	<b>STATE</b> Colorado
<b>ZIP</b> 15406	<b>PHONE</b> 303-672-6745
<b>JURISDICTION NAME</b> 	<b>JURISDICTION TYPE</b> -Select-
<b>COMMENT</b> New court location for Denver	
<b>COURT LOCATION</b> <input checked="" type="checkbox"/>	<b>RECEIVED FROM AGENCY</b> <input checked="" type="checkbox"/>
<b>ACTIVE</b> <input checked="" type="checkbox"/>	<b>AFFIDAVIT FOOTER</b> <input type="checkbox"/>
<a href="#">Save</a>	

- Make changes as needed.
- Click **Save** to save changes and return to the *Court Locations* table.

### Delete Court Locations

Use the following procedure to delete a court location from the *Court Locations* table.

- Locate the record you need to delete from the table.
- Click  in the **Actions** column in the same row as the record listing.
- If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Court Locations* table.

## Judges

To setup judges, click the [Judges](#) link on the **RMS Tables** tab of the *Tables* page. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).

[Go Back](#)  
[+ Add Judge](#)

Show  entries
 Search:

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

Showing 1 to 10 of 16 entries

[Previous](#)
[1](#)
[2](#)
[Next](#)

### Add Judge

Use the following procedure to add a judge to the *Judges* table.

1. Click the **Add Judge** button in the upper right corner of the *Judges* table to open a blank entry form.

Judge

LAST NAME

FIRST NAME

MIDDLE NAME

TITLE

USER ID

ACTIVE

☐


Close

Save

2. Complete all required fields and optionally complete others.
3. Click **Save** to save the record and return to the *Judges* table.

### Edit Judges

Use the following procedure to edit a judge in the *Judges* table.

1. Locate the record you need to edit.
2. Click  in the **Actions** column in the same row as the record to open the record for editing.

Judge

LAST NAME

Stem

FIRST NAME

Robert

MIDDLE NAME

TITLE

Judge

USER ID

ACTIVE

☒


Close

Save

3. Make changes as needed.
4. Click **Save** to save changes and return to the *Judges* table.

### Delete Judges

Use the following procedure to delete a judge from the *Judges* table.

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Judges* table.

## Common Place Names

The **Clery Act** requires that higher education institutions report campus crimes associated with the institution. Many universities have only one address, yet the campus complex could have hundreds of buildings and locations that are either on or off the main campus, are residential facilities, or adjacent to campus; all of which share the same address. Online RMS provides the ability to associate any *Common Place Name* associated with an address and map it to any pre-defined location code.

For example, an officer taking a report for an incident that occurred in a classroom receives the option of choosing from a list of Clery locations like *On Campus* or *Residential Facility*; in this case the officer selects, *On Campus*.

Click the [Common Place Names](#) link on the **RMS Tables** tab of the *Tables* page to display your agency's *Common Place Names* table. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).

Name	Agency	Active	Actions
Outside Store	Indiana State Police	Yes	
hotspot	Indiana State Police	Yes	
ANG TEST	District 42, Versailles	Yes	
Dead strip	District 42, Versailles	Yes	
District 42 test	District 42, Versailles	Yes	
sidewalk	District 35, Evansville	Yes	
Hill	All Other	Yes	
ANG TEST		Yes	
Health Center		Yes	
TEST		Yes	

Showing 1 to 10 of 11 entries

Previous 1 2 Next

### Add Common Place Name

Use the following procedure to add a common place name to the *Common Place Names* table.

1. Click the **Add Common Place** button in the upper right corner of the *Common Place Names* table to open a blank entry form.

Common Place Name

NAME:  AGENCY:  ACTIVE: ☒

CATEGORIES:


2. Enter the **Name** and select the Agency if applicable.
3. The **Active** box is checked by default.
4. Select one or more **Categories** that apply.

**Note:** Online RMS provides five *Categories* by default: Non-Campus, Off Campus, On Campus, Public Property, Residential Facilities. Contact Caliber Public Safety personnel to assist with updates to this list.

5. Click **Save** to save the record and return to the *Common Place Names* table.


### Edit Common Place Names

Use the following procedure to edit a common place name in the *Common Place Names* table.

1. Locate the record you need to edit.
2. Click  in the **Actions** column in the same row as the record to open the record for editing.
3. Make changes as needed.
4. Click **Save** to save changes and return to the *Common Place Names* table.

### Delete Common Place Names

Use the following procedure to delete a common place name from the *Common Place Names* table.


1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Common Place Names* table.

## Notification Types











From the **RMS Tables** tab of the *Tables* page, click the [Notifications Setup](#) link to display the *Notification Types* table. For instructions on accessing the *Tables* page refer to [AccessTables.htm](#).

### Search Notification Type

Use the following procedure to search the *Notifications Types* table.

1. Click  in the **Search By** field.
2. Select from the drop-down. (Available options include: Action URL, Description, Email, Information Notification, Priority, Roles, and Type.)
3. Click in the **Search** text field and type in a keyword.
4. Click **Search** to redisplay the table with the search results as shown in the example below.

[Go Back](#)

SEARCH		SEARCH					
<input type="text" value="urgent"/>		<input type="text" value="Priority"/>					
							
				<a href="#">Reset</a>	<a href="#">Search</a>		
Type	Description	Priority	Informational Notification	Send Email	Action URL	Roles Notify	Actions
15	Disapproved Incident Report	Urgent	N	Y	Irutil.Do?Dispatchto=Navigatetoincident&Neweditmode=Y&	Not Available	
39	High Priority Incident Approved - For Your Consideration	Urgent	N	N	Irutil.Do?Dispatchto=Navigatetoincident&	Not Available	
4	Vehicle Alert	Urgent	N	N	Vehicle.Do?Dispatchto=View&	Not Available	
8	Gang Alert	Urgent	N	Y	Managegang.Do?Dispatchto=Getdata&Summary=True&	Not Available	
2	Administrative	Urgent	N	Y	Display User Profile Maintenance Screen For User	Not Available	
5	Business Alert	Urgent	N	Y	Showorganization.Do?Dispatchto=Vieworganization&	Not Available	
3	Person Alert	Urgent	N	Y	Person.Do?Dispatchto=View &	Not Available	
6	Property Alert	Urgent	N	Y	Manageproperties.Do?Dispatchto=View&	Not Available	
7	Location Alert	Urgent	N	Y	Locations.Do?Dispatchto=View&	Not Available	

[Go Back](#)

The example is the result of a search for *Priority* with the key word *Urgent*.

### Add a Notification Type

Use the following procedure to add a notification type to the *Notification Types* table.

1. Click the **Add Notification Type** button in the upper right corner to display an *Add Notification Type* page as shown below.



**PRIORITY**  
Urgent

**NOTIFICATION AGENCY TYPE**  
Police Agency

**DESCRIPTION**  
HIGH PRIORITY INCIDENT APPROVED - FOR YOUR CONSIDERATION

**ACTION URL**  
IrUtil.do?dispatchto=navigateToIncident&

**ROLES**  
\* CAL\_ADMIN \* COMMAND

**NOTIFY COMMENT**

**GLOBAL VARIABLE 1**  
incidentId

**GLOBAL VARIABLE 2**  
supplementId

**GLOBAL VARIABLE 3**

**GLOBAL VARIABLE 4**

**GLOBAL VARIABLE 5**

**Other Options**


<b>INFORMATIONAL ONLY</b> <input type="checkbox"/>	<b>NOTIFY USER</b> <input checked="" type="checkbox"/>	<b>SEND EMAIL</b> <input type="checkbox"/>	<b>SEND TO ALL AGENCIES</b> <input type="checkbox"/>
<b>USER DELETE</b> <input checked="" type="checkbox"/>	<b>QUERY ONLY</b> <input checked="" type="checkbox"/>	<b>RESTRICT WORK GROUP</b> <input type="checkbox"/>	

Go Back Update

2. If needed, click ▼ in the **Priority** field and select another priority.
3. Click ▼ in the **Notification type** field and select a type
4. Complete other fields as applicable.
5. Click to check **Other Options** boxes as needed.
6. Click **Save** to save the record and return to the *Notification Types* table.


### Edit a Notification Type

Use the following procedure to edit a notification type record in the *Notification Types* table.

1. Locate the notification type record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Notification Type* page.
3. Make changes as needed then click **Update**.

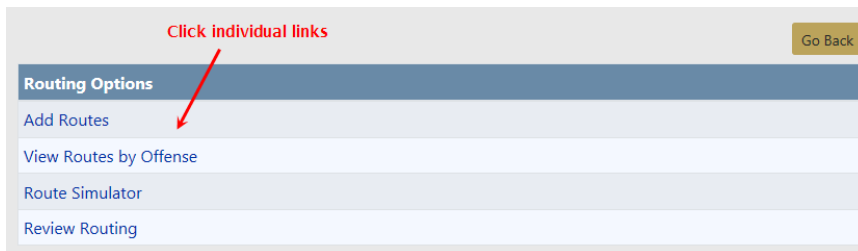
## Delete a Notification Type

Use the following procedure to delete a notification type record from the *Notification Types* table.

1. Locate the notification type record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Notification Types* table.

## Approval Routes

From the **RMS Tables** tab of the *Tables* page, click the [Approval Routing](#) link to display the *Approval Routes* table as shown in the following example:



## Add Routes

Click [Add Routes](#) to open the *Add Approval Route* page as shown.

RMS Tables / Approval Routing / Add Approval Route

**Offenses** [Go Back](#)

Select offenses using the autocomplete below, or select a NIBRS code to add all offenses belonging to that NIBRS code.

OFFENSE CODE

NIBRS CODE

-Select-

SELECTED OFFENSES Leave Blank For All Remove All

**Notification**

NOTIFICATION

-Select-

DESTINATION AGENCY

-Same As Source Agency-

USER CANNOT CHANGE DESTINATION AGENCY AT TIME OF APPROVAL

APPLY TO ANY SUPPLEMENT ?

**Source Agencies**

SOURCE AGENCIES Leave Blank For All

Click To Select

**Statuses**

STATUSES Leave Blank For All

Click To Select

[Save](#)

Complete all required fields and as many others as are applicable.

Click **Save** to open the *Route Results* page with the new route.

### ***View Routes by Offense***

Click [View Routes by Offense](#) to open the *Offenses With Routes* page as shown.

Go Back

Show 10 entries Search:

Offense Code	Description	NIBRS Code	NIBRS Description	Count
14-21-1-36	NATURAL RESOURCE- POSSESS LOOTED PROPERTY	280	Stolen Property Offenses	1
14-21-2-4	NATURAL RESOURCE- PURCHASE/SALE OF ITEMS REMOVED FROM CEMETERY	280	Stolen Property Offenses	1
14-22-30-1	NATURAL RESOURCE- UNLAWFUL USE OF EXPLOSIVES IN STATE WATERS	520	Weapon Law Violations	1
16-42-19-16	HEALTH- LEGEND DRUG FRAUD	90Z	All Other Offenses	1
22-11-14-6	SAFETY- FIREWORKS REGULATION LAW VIOLATIONS	520	Weapon Law Violations	1
22-11-20-6	SAFETY- POSSESS ANHYDROUS AMMONIA IN UNAPPROVED CONTAINER	520	Weapon Law Violations	1
35-42-1-1 M02	MURDER- ATTEMPTED- FIREARM	09A	Murder and Nonnegligent Manslaughter	1
35-42-1-1 M03	MURDER- ATTEMPTED- KNIFE	09A	Murder and Nonnegligent Manslaughter	1
35-42-1-1 M04	MURDER- ATTEMPTED- NO WEAPON	09A	Murder and Nonnegligent Manslaughter	1
35-42-1-1 M05	MURDER- ATTEMPTED- OTHER	09A	Murder and Nonnegligent Manslaughter	1



Showing 1 to 10 of 353 entries

Previous 1 2 3 4 5 ... 36 Next

Click on a **Offense Code** link to view offense details.

Go Back

**OFFENSE**  
14-21-1-36 - Natural Resource- Possess Looted Property

Route ID	Notification Type	Statuses	Source Agencies	Destination Agency	Required	Actions
768	INCIDENT APPROVED - FOLLOW UP CASE DECISION NEEDED	(All Statuses)	(All Agencies)	(Same As Source)	No	 

## Route Simulator

Click [Route Simulator](#) to open the *Route Simulator* page as shown.

Go Back

Parameters

OFFENSE CODE

SELECTED OFFENSES

ORIGINATING AGENCY

-Select-

INCIDENT STATUS

-All Statuses-

Show Routes

Results

Click into the **Offense Code** field and begin typing to display a list that matches your entered test. Select the appropriate Offense Code from the list and your selection appears in the **Selected Offenses** box automatically. Repeat for additional offenses, if needed.

Complete required fields and others as needed, then click **Show Routes** to display the results at the bottom of the *Route Simulator* page.

Go Back

Parameters

OFFENSE CODE

SELECTED OFFENSES

14-15-11-11 Natural Resource- Operate A Motorboat While License Suspended

ORIGINATING AGENCY

Indiana State Police

INCIDENT STATUS

-All Statuses-

Show Routes

Results

Send	Notification	Destination Agency
<input type="checkbox"/>	INCIDENT APPROVED - FOLLOW UP CASE DECISION NEEDED	(Can Modify)

Check the **Send** box and modify the text in the **Destination Agency** field as needed.






## Mapping Types

From the **RMS Tables** tab of the *Tables* page, click the Manage External Mappings link to display the *Mapping Types* table as shown in the following example:


RMS Tables / Mapping Types

Show 10 entries Go Back

Search:

Code	Description	Mapping	Actions
MOBILE_ETH	Mobile Ethnicity Codes	4	
MOBILE_EYES	Mobile Eye Codes	25	
MOBILE_HAIR	Mobile Hair Codes	24	
MOBILE_RACE	Mobile Race Codes	24	
MOBILE_SEX	Mobile Sex Codes	9	

Showing 1 to 5 of 5 entries Previous 1 Next

Click the **Select** icon  in the **Actions** column to the far right of any code listing to open a *Mapping for Type* page as shown in the following example.

RMS Tables / Mapping Types / Mappings For Type

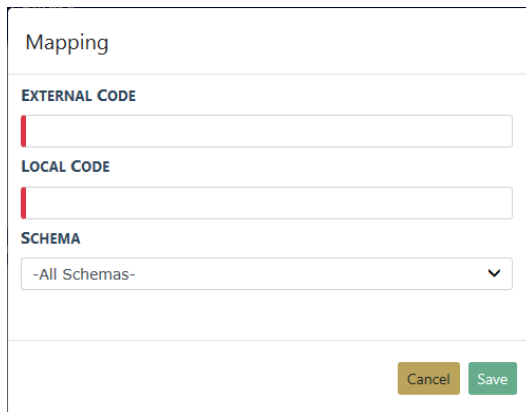
Show 10 entries Go Back Add Mapping

Search:

Schema Name	External Code	Local Code	Actions
[All Schemas]	BR	BRO	 
[All Schemas]	BROWN	BRO	 
[All Schemas]	BLK	BLK	 
[All Schemas]	BRO	BRO	 
[All Schemas]	GRN	GRN	 
[All Schemas]	MAR	MAR	 
[All Schemas]	PNK	PNK	 
[All Schemas]	BLU	BLU	 
[All Schemas]	GRY	GRY	 
[All Schemas]	HAZ	HAZ	 

Showing 1 to 10 of 25 entries Previous 1 2 3 Next

- To add a mapping, click the **Add Mapping** button to open the **Mapping** window as shown below.

A screenshot of a 'Mapping' form. It has three input fields: 'EXTERNAL CODE', 'LOCAL CODE', and 'SCHEMA'. The 'EXTERNAL CODE' and 'LOCAL CODE' fields have a red vertical bar on the left. The 'SCHEMA' field is a dropdown menu with '-All Schemas-' selected. At the bottom right are 'Cancel' and 'Save' buttons.

Mapping

EXTERNAL CODE

LOCAL CODE


SCHEMA

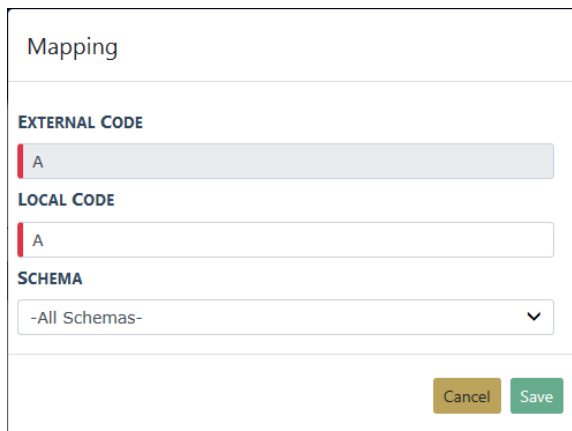
-All Schemas-

Cancel Save

Complete required fields and select the **Schema** if applicable.

Click **Save**. Click **OK** to return to the previous page with the new mapping listed at the bottom of the list. (You may need to navigate to another page to see it.)

- To edit a mapping, click  in the **Actions** column to the far right of the listing to open the **Mapping** window as shown below.

A screenshot of the 'Mapping' form, similar to the first one, but with the 'EXTERNAL CODE' and 'LOCAL CODE' fields populated with the letter 'A'. The 'SCHEMA' dropdown remains at '-All Schemas-'. The 'Cancel' and 'Save' buttons are at the bottom right.

Mapping

EXTERNAL CODE

A

LOCAL CODE

A

SCHEMA

-All Schemas-

Cancel Save

Edit the value in the **Local Code** field and select a difference schema as needed.

Click **Save**.





# Chapter 15. Custom Forms

The Custom Forms feature must be enabled by Caliber Public Safety personnel in order for an agency to use it. In addition, only administrative user who have been assigned the appropriate role with the custom forms privileges can create or edit custom forms, and only users who have been assigned roles with the custom forms privileges can use the forms.

- "Set Up Agency" below for more information on enabling the feature.
- "Set Up Roles" on the next page for information on setting up roles with custom form privileges.

**Community Reporting**, a new Online RMS 11.3.2 feature (for minor crime, tips, and other police-related events), leverages the power of Online RMS Custom Forms, allowing agencies to create and manage their publicly available forms.

- See "Community Reporting with Custom Forms" on page 270 for information on Community Reporting.

## Set Up Agency

Caliber Public Safety personnel has the ability to enable the Custom Forms feature for an agency; once it is enabled, agency users with the proper permissions can give appropriate access to other agency users.

The Agency Profile displays available and enabled features in a read-only format.

Agency Information - Indiana State Police | Sub Agency | Agency Organization | Quick Links | Agency Settings

### Agency Information

AGENCY INTERNAL CODE IPSC	ORI NUMBER 123456789
AGENCY DISPLAY CODE IPSC	WEBSITE www.in.gov/isp/
AGENCY CODE DISPLAY TEXT Indiana State Police	PHONE 317-899-8293
AGENCY TYPE Police Agency	FAX 317-233-3057
TIME ZONE (GMT-05:00) Eastern Time(US and Canada)	POINT OF CONTACT

### External Authentication

Enabled	Type	Host	Port	Shared Secret	Enable Level	Action
<input type="checkbox"/>	SAFENET	radius-public-safety-cloud.com	1812	*****	USER	<a href="#">Update</a> <a href="#">Delete</a>

### Agency Administrators

Add User

--Select User-- [Add](#)

### Agency User Subscriptions

Subscription Type	Allocated	Actual	Difference
Full Time	0	129	-129
Part Time	0	1	-1
Reserve	0	1	-1
Full Time Non-Sworn	0	1	-1
Part Time Non-Sworn	0	1	-1
View Only	0	1	-1

### Features

SELECTED	NOT SELECTED
<ul style="list-style-type: none"> <li>Arrest Signature Capture</li> <li>Field Arrest Property</li> <li>Basic CAD</li> <li><b>Custom Forms</b></li> <li>Calls For Service</li> </ul>	<ul style="list-style-type: none"> <li>Fleet Management</li> <li>LEADRS DWI Interface</li> <li>LIMS Evidence XML Data Extract</li> <li>Lost And Found</li> <li>Scheduling</li> </ul>

**This section is read-only.**

**Note:** For instructions on accessing the Agency Profile refer to "Manage Agencies" on page 17.


## Set Up Roles

An administrator with the appropriate permissions must set up specific roles with permission to use Custom Forms. It is up to the agency as to which roles are assigned Custom Form privileges.

The administrator uses the following procedure to add Custom Forms rights to a role.

1. Access the Roles page and locate the Role you want to give Custom Forms rights to.

**Note:** For details on accessing the Roles page refer to "Roles" on page 77.

2. Click  in the **Actions** column in the same row as the role to open the *Edit Role* page.

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

Go Back Add Role Compare

Show 10 entries

Search: copy

Compare:	Role Name	Role Description	Actions
<input type="checkbox"/>	COPY_DL_TEST	IA-52785	
<input type="checkbox"/>	COPY_USER_ADMIN	Role for User Admins	

Showing 1 to 2 of 2 entries (filtered from 45 total entries)

Go Back Previous 1 Next

- Click the **Role Permission Categories** tab to open the *Role Permission Categories* page where you can add or remove permissions for the selected role.

Role Role Permission Categories

Click on the + sign on all applicable permissions to add to the role

Role Name: Copy\_User\_Admin

4 items selected Remove all Add all

Administration - Show The Main Administration Menu	Training - Schema level management.	+
Administration - Users	User External Authentication Configuration	+
Basic Access	User Fields Admin - Add And Edit Fields	+
EJS Support - submit tickets	User Form Admin - Add And Edit Fields	+
	User Form Admin - Add And Edit Forms	+
	User Form Admin - Add New Form Fields	+
	User Form Admin - Delete A Form Design	+
	User Form Admin - Edit Form Routing	+
	User Form Admin - Edit Form Script	+
	User Form Admin - Export Form Template	+
	User Form Admin - Form Designer	+
	User Form Admin - Manage All Code Tables	+
	User Form Admin - Manage Code Tables	+
	User Form Admin - Manage Form Reports	+
	User Form Admin - Manage Forms	+
	User Form Admin - Preview Form	+
	User Form Admin - Show Admin Main Screen	+
	User Form Admin - Show Delete Log	+

Go Back Save

Role Role Permission Categories



Custom Forms permissions added to the Copy\_User\_Admin Role

Role Name: Copy\_User\_Admin

23 items selected Remove all Add all

Administration - Show The Main Administration Menu	Training - Schema level management.	+
Administration - Users	User External Authentication Configuration	+
Basic Access	User Fields Admin - Add And Edit Fields	+
EJS Support - submit tickets	User Forms - Add And Edit	+
User Form Admin - Add And Edit Fields	User Forms - Add a Comment	+
User Form Admin - Add And Edit Forms	User Forms - Delete A Filled Form	+
User Form Admin - Add New Form Fields	User Forms - Export Forms to Excel	+
User Form Admin - Delete A Form Design	User Forms - Open Any Form For Edit	+
User Form Admin - Edit Form Routing	User Forms - Open a Form For Edit at Agency Level	+
User Form Admin - Edit Form Script	User Forms - Open a Form For Edit at Org Level	+
User Form Admin - Export Form Template	User Forms - Reject a Form	+
User Form Admin - Form Designer	User Forms - Review a Form	+
User Form Admin - Manage All Code Tables	User Forms - Search And View	+
User Form Admin - Manage Code Tables	User Forms - Search Integration	+
User Form Admin - Manage Form Reports	User Forms - Show Comment And Route Log	+
User Form Admin - Manage Forms	User Forms - View Form Audit Log	+
User Form Admin - Preview Form	Vehicle - Add New Models	+
	Vehicle - Add and Edit	+

Go Back Save

- Click  to add permissions from the available list on the right, or click  to remove permissions from that role on the left.

**Note:** Custom Forms permissions include anything with the prefix *User Form Admin*.

- Click **Save** to save changes.
- When changes are complete for this role, click **Go Back** to return to the *Roles* page.
- Log out or continue working in the Roles module as needed.

## Form Administration

Click the **Administration** label to display the *Administration Home* page. From the *Administration Home* page, click the **Custom Forms** icon to open the *Form Administration* page.

Form Administration	
Create New Form	Create and design a new form
Upload a Form Design	Create a new form by uploading an XML design file. The layout of the fields will be determined by this XML.
Manage Forms	Preview / Edit / Download or Delete Forms.
Manage Custom Fields	Manage custom fields for various application screens.
Manage Sub Forms	View / Modify Sub Forms
Add Sub Form	Create a new Sub Form.
Manage Form Code Tables	Manage Form Code Tables Used By All Forms.
Form Delete Log	Show log of deleted forms, custom fields, and sub forms.

From here, an administrator can create a new custom form, upload a form design, manage forms, manage custom fields, manage sub forms, add sub form, manage code tables, and show the form delete log. When an administrator adds a new form, certain information is required, such as Name, Title, Default Security Level, Officer Entry, Roles, and Form Types. The agency administrator decides how to fill out the required fields. This information may be changed later if the administrator chooses to edit the forms.

## Create (Add) New Form

Use the following procedure to create a new form.

1. From the *Form Administration* page, click the Create New Form link to open the *Add Form* page as shown.

The screenshot shows the 'Form Administration' page in the Caliber Public Safety system. The navigation bar at the top includes links for Administration, Incidents, Master Indices, Records Management, Forms And Reports, and Help. The breadcrumb trail indicates the current location is 'Administration / Form Administration'. A table lists various form management options:

Create New Form	Create and design a new form
Upload a Form Design	Create a new form by uploading an XML design file. The layout of the fields will be determined by this XML.
Manage Forms	Preview / Edit / Download or Delete Forms.
Manage Custom Fields	Manage custom fields for various application screens.
Manage Sub Forms	View / Modify Sub Forms
Add Sub Form	Create a new Sub Form.
Manage Form Code Tables	Manage Form Code Tables Used By All Forms.
Form Delete Log	Show log of deleted forms, custom fields, and sub forms.

The screenshot shows the 'Add Form' page. At the top right are 'Go Back' and 'Save' buttons. A message box states: 'Please start by entering basic form information. Once the form is saved, you will be able to design the forms fields. Note that the form will not be available to users until you publish and activate it.' The form fields are as follows:

- TITLE**: A required text field (indicated by a red vertical bar) with a yellow highlight.
- DESCRIPTION**: A text area.
- PRINT HEADER**: A text area.
- RESTRICT TO AGENCY**: A dropdown menu with 'Click To Select'.
- DEFAULT SECURITY LEVEL**: A dropdown menu with 'Patrol Supervisor' selected.
- OFFICER ENTRY**: A dropdown menu with '-Select-' selected.
- REVIEW REQUIRED**: A checkbox, currently unchecked.
- RESTRICT EDIT**: A checkbox, currently unchecked.
- ROLES**: A dropdown menu with 'Click To Select'.
- FORM TYPES**: A dropdown menu with 'Click To Select'.

A 'Save' button is located at the bottom center of the form.

2. Type a name for the form in the required **Title** field. This should be a name easily related to the form's function because it is what the user sees when searching for a form.

3. Type a brief description of the form in the optional **Description** field, including information for intended users about the forms purpose. The title is visible on the custom form within RMS but not on the printed form.
4. Type a header for the printed form in the optional **Print Header** field. The Printer Header appears only on the printed form.
5. Click in the **Restrict to Agency** field then select one or more agencies to give them the ability to view and edit the form. Usually this field is not used.
6. Click ▼ in the **Default Security Level** field and select to change the security level so that only users with a security level as high or higher than the selected security level can view and edit the form. The person who created the form can always view the form regardless of security level.
7. Click ▼ in the **Officer Entry** field and select the appropriate option. This selection determines whether an officer entry is required, optional, or unspecified when completing the form.
8. Check the **Review Required** box, if appropriate. A notification appears in a yellow box at the top of the *Submit for Review* page requesting a user review a PDF copy of the form before the creator submits it.
9. Check the **Restrict Edit** box, if appropriate.
10. Click in the **Roles** field and select one or more Roles to limit use of this form to those specific Roles.
11. Click in the **Form Types** field and select one or more Form Types to limit this form to specific Form Types.
12. Click **Save** to save.

The designer opens the new form in the Form Editor. "Form Editor" on page 250 for more information.)

The screenshot shows the 'Form Details' tab in the 'Form Administration' interface. At the top right are 'Exit Form Editor' and 'Preview' buttons. The 'Form Details' tab is highlighted. Below the tabs, the 'PUBLISH STATUS' is 'Not Published' (in red text) and 'ACTIVE STATUS' is 'Inactive'. The 'TITLE' field contains 'Ang Test Custom Form 3'. The 'DESCRIPTION' field also contains 'Ang Test Custom Form 3'. The 'PRINT HEADER' field contains 'Ang Test Custom Form 3'. The 'RESTRICT TO AGENCY' field has a 'Click To Select' dropdown. The 'DEFAULT SECURITY LEVEL' is 'Patrol Supervisor' and 'OFFICER ENTRY' is 'Officer is Required'. 'REVIEW REQUIRED' and 'RESTRICT EDIT' are both checked. The 'ROLES' field contains 'CASE\_SUPERVISOR'. The 'FORM TYPES' field contains 'Vehicles'. The 'FORM ADMINS' field is empty. Below it, 'SELECTED FORM ADMINS' is empty with a 'Double Click To Remove' instruction. The 'RESTRICT VIEW ACCESS USERS' field is empty. Below it, 'SELECTED USERS' is empty with a 'Double Click To Remove' instruction. A 'Save' button is at the bottom center.

**Note:** From the *Administration Home* page, you can click on the Custom Forms icon to open the *Form Administration* page then click the Manage Forms link to open the *Manage Forms* page at any time. From the *Manage Forms* page, you can edit, view, print, and/or delete forms.

The **Publish Status** is listed in red text for forms that are not published.

## Upload Form Design

Use the following procedure to upload a form design.

1. From the *Form Administration* page, click the Upload a Form Design link to open the *Upload Form* page as shown.

Form Administration

Go Back

SELECT A FILE

Choose File No file chosen

Upload

2. Click the **Choose File** button in the **Select a File** field to open the *File Explorer* window listing your local directories.
3. Navigate to the folder containing form design documents.
4. Click to select a file then click the **Open** button to pull the path into the **Select a File** field.
5. Click **Upload** to upload the file.

## Manage Forms

Use the following procedure to manage forms.

1. From the *Form Administration* page, click the Manage Forms link to open the *Manage Forms* page as shown.

Form Administration / Manage Forms

Go Back

**Forms Created By Your Agency**





Name	Creator	Agencies	Date Created	# of Instances	Publish Status	Active Status	Actions
A New Form	Some Guy	District 42, Versailles	11/10/2014 1235	5	Yes	Active	
A Simple Custom Form	Sgt. Collins		11/07/2014 0831	4	Yes	Inactive	
Ang Test Custom Form	Homer Simpson		03/02/2017 0934	22	Yes	Inactive	
Ang Test Custom Form 3	Homer Simpson	All Agencies	02/26/2019 1058	0	No	Inactive	
Another Test Form	Derek Livangood	District 42, Versailles	11/05/2014 1224	0	Yes	View Only	
D42 Test Form	Joe Friday	District 42, Versailles	11/17/2014 1350	0	Yes	Inactive	
Derek Test Form	Joe Friday	District 42, Versailles	11/05/2014 1054	9	Yes	Active	
Derek Test Form 2	Joe Friday		11/05/2014 1147	4	Yes	Inactive	
New Form	Christine Saur	District 42, Versailles	03/29/2018 1346	0	No	Inactive	
New Form	Christine Saur	District 42, Versailles	02/28/2019 1206	0	No	Inactive	

**Other Forms**

Name	Agencies	Date Created	# of Instances	Publish Status	Active Status	Actions
1 Custom Form to Rule Them All	All Agencies	03/28/2013 1038	93	Yes	Inactive	
11.0 Custom Form Test	District 42, Versailles	02/25/2019 0906	1	Yes	Active	
Ann Test		07/06/2015 1427	0	No	Inactive	



2. Using the icons in the **Action** column in the same row as the form, continue as follows:



















- To delete a form, click .
- Note:** You may not delete a form that is active. You must first deactivate it.
- To download a form (in XML format), click .
- To open the *Form Preview* page with an example of a form, click .
- To edit a form, click . ("Form Editor" on page 250 for instructions.)

## Manage Custom Fields










At the top of each section of the Custom Fields form, you have the option to add fields from existing forms or upload custom fields.

Form Administration / Custom Fields Go Back

**Incident Offender Fields** Add Incident Offender Fields Upload Custom Fields































Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
ANGTESTAGENCY	No	Inactive	No	0	  
District 16, Peru - GA	Yes	Active	Yes	6	  
- All Agencies -	Yes	Active	Yes	196	  
District 42, Versailles	Yes	Inactive	Yes	396	  
A_standalone Pd	No	Inactive	No	0	  
All Other	No	Inactive	No	0	  

**Incident Victim Person Fields** Add Incident Victim Person Fields Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
District 42, Versailles	Yes	Active	Yes	317	  
- All Agencies -	Yes	Active	Yes	144	  
Indiana State Police	No	Inactive	No	0	  

### Add Fields from Existing Forms


- From the *Form Administration* page, click the Manage Custom Fields link to open the *Custom Fields* page.

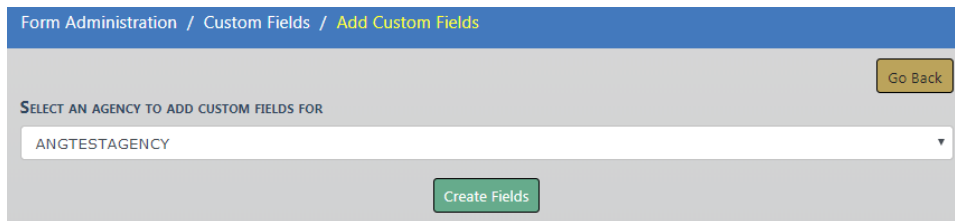
Form Administration / Custom Fields					
Incident Offender Fields					
Add Incident Offender Fields Upload Custom Fields					
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
ANGTESTAGENCY	No	Inactive	No	0	  
District 16, Peru - GA	Yes	Active	Yes	6	  
- All Agencies -	Yes	Active	Yes	196	  
District 42, Versailles	Yes	Inactive	Yes	396	  
A_standalone Pd	No	Inactive	No	0	  
All Other	No	Inactive	No	0	  
Incident Victim Person Fields					
Add Incident Victim Person Fields Upload Custom Fields					
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
District 42, Versailles	Yes	Active	Yes	317	  
- All Agencies -	Yes	Active	Yes	144	  
Indiana State Police	No	Inactive	No	0	  
Incident Offense Fields					
Add Incident Offense Fields Upload Custom Fields					
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
All Other	Yes	Active	Yes	19	  
Indiana State Police	Yes	Active	Yes	380	  
- All Agencies -	Yes	Active	Yes	10	  

You can

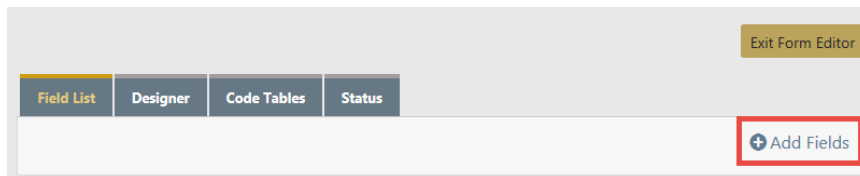
If you choose to add fields from existing forms, the following forms are available:


- Incident Offender
- Incident Victim Person
- Incident Offense
- Field Arrest
- Field Contact
- Case
- Warrant
- Citation
- Field Arrest Vehicle
- Incident Header
- Calls For Service
- Impound
- Court Paper

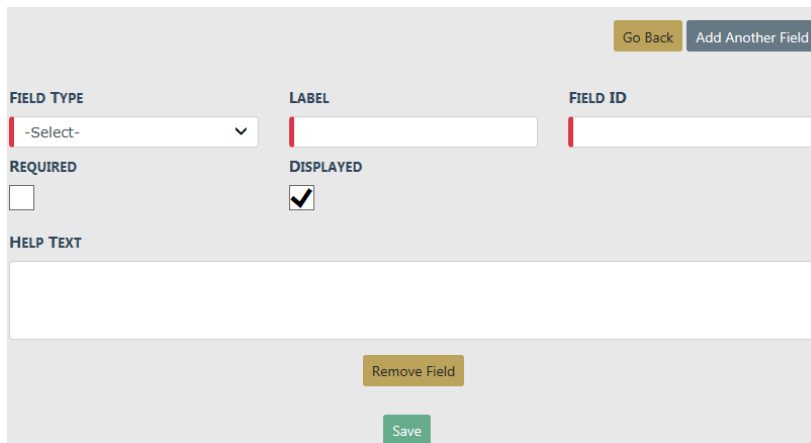
- Fleet Vehicle
  - Case Activity
  - Criminal Complaint
2. Click the appropriate  Add...Fields link to open a page similar to the one shown.



3. Select an agency from the drop-down list if not already populated.
4. Click **Create Fields** to display a page similar to the one shown.



5. Click the  Add Fields link to open the *Add Fields* page as shown.




6. Complete the fields and select appropriate buttons and click **Save**.
7. Click **Add Another Field** to add another field, if needed.

**Note:** If you want to remove the newly added field, click the **Remove Field** button.

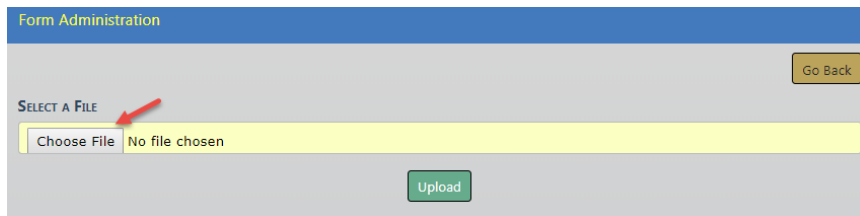
8. Repeat Steps 6 and 7 until you have added all the fields needed.
9. Click **Go Back** to return to the previous page and click **Exit from Editor**.
10. Optionally click the **Designer** tab to open the Form Designer. This is used to position the fields on the form. For more information on the Form Designer, refer to "Designer Tab" on page 258.
11. Optionally click on the **Code Tables** tab to add a code table.
12. Click on the **Status** tab to activate or inactivate the form.
13. Click **Exit form Editor** to return to the *Custom Fields* home page.
14. Click **Go Back** to return to the *Form Administration* page.

## Upload Custom Fields

1. From the *Form Administration* page, click the Manage Custom Fields link to open the *Custom Fields* page.

Form Administration / Custom Fields					
Incident Offender Fields <span>➕ Add Incident Offender Fields</span> <span>➕ Upload Custom Fields</span>					
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
ANGTESTAGENCY	No	Inactive	No	0	  
District 16, Peru - GA	Yes	Active	Yes	6	  
- All Agencies -	Yes	Active	Yes	196	  
District 42, Versailles	Yes	Inactive	Yes	396	  
A_standalone Pd	No	Inactive	No	0	  
All Other	No	Inactive	No	0	  
Incident Victim Person Fields <span>➕ Add Incident Victim Person Fields</span> <span>➕ Upload Custom Fields</span>					
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
District 42, Versailles	Yes	Active	Yes	317	  
- All Agencies -	Yes	Active	Yes	144	  
Indiana State Police	No	Inactive	No	0	  
Incident Offense Fields <span>➕ Add Incident Offense Fields</span> <span>➕ Upload Custom Fields</span>					
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
All Other	Yes	Active	Yes	19	  
Indiana State Police	Yes	Active	Yes	380	  
- All Agencies -	Yes	Active	Yes	10	  

2. Click the ➕ Upload Custom Fields link to open the *Upload Form*.



The screenshot shows a web interface titled "Form Administration". Below the title bar, there is a "Go Back" button in the top right corner. The main section is labeled "SELECT A FILE". Under this label, there is a yellow box containing a "Choose File" button and the text "No file chosen". A red arrow points to the "Choose File" button. Below the yellow box is a green "Upload" button.

3. Click **Browse** to the right of the **Select a File** field to open the *File Upload* window with your local directories.
4. Navigate to the folder containing form design documents.
5. Click to select a file and pull the path into the **Select a File** field.
6. Click **Upload** to upload the file and open the *Form Resource Review* page. Fleet Vehicle fields are used for illustration purposes, but the same general process applies to other areas.
  - a. If the Field IDs in the uploaded document match fields that already exist, then enter new **Field IDs** by entering new **Updated Value** values.
  - b. If no duplicate Field IDs are found in the uploaded document, a *No Duplicate Field Values Found* message appears.
7. Click the **Continue to Preview** button to open the *Add Fields* page
8. Select an **Agency** then click the **Create Fields** button to open the normal *Field List* screen.
9. Add more fields or click on the *Designer* tab to place the new fields on the form. For more information on the *Designer* tab refer to "Designer Tab" on page 258.

## Manage Form Code Tables

Use the following procedure to manage form code tables.

1. From the *Form Administration* page, click the Manage Form Code Tables link to open the *Code Tables* page as shown.

Form Administration / Form Code Tables

Go Back

[+ Add Code Table](#)

Show 10 entries Search:

Table	Description	Actions
_CS_AIRCRAFT_OWNER_CODES		
_CS_AIRCRAFT_TYPE_CODES		
_CS_ANGTESTCODE		
_CS_ANIMAL_DEST_CODES		
_CS_ANIMAL_DOMEST_CODES		
_CS_AREA_SUB_TYPE_CODES		
_CS_AREA_TYPE_CODES		
_CS_ATTN_LIST		
_CS_BACKSTOP_TYPE_CODES		
_CS_CHECK_FLAG	Check for flag	

Showing 1 to 10 of 152 entries

Previous 1 2 3 4 5 ... 16 Next

Go Back

## 2. Add a Code Table.

- Click the [Add Code Table](#) link to open the *Code Table* page as shown.

Form Administration / Form Code Tables / Code Table

Go Back

**Code Table Details**

TABLE IDENTIFIER

DESCRIPTION

☐ SORT ALPHABETICALLY When checked, the codes will be sorted alphabetically regardless of how you enter them.


**Codes** [+ Add New Code](#)

Save

- Complete the fields and select the **Sort Alphabetically** button if applicable.
- Click the [Add New Code](#) link to open fields to enter a new code and its label.
- Complete the **Code** and **Label** fields then repeat until you have added all the codes you want for this table.
- Click **Save** to save the new table and return to the *Code Tables* page.

- To locate a code table, use the page buttons at the bottom of the page, or use the Search text box.

Previous 1 2 3 4 5 ... 16 Next

- To edit a code table, click the edit icon  in the **Actions** column.

[Go Back](#)

### Code Table Details

**TABLE IDENTIFIER** ⓘ





\_CS\_AIRCRAFT\_OWNER\_CODES

**DESCRIPTION**

**SORT ALPHABETICALLY** When checked, the codes will be sorted alphabetically regardless of how you enter them.

☐

**Codes** [+ Add New Code](#)

CODE	LABEL	ACTIVE	
ST	State	<input checked="" type="checkbox"/>	
CAP	CAP	<input checked="" type="checkbox"/>	
DEA	DEA/Customs	<input checked="" type="checkbox"/>	
OTH	Other	<input checked="" type="checkbox"/>	

[Save](#)

- Make changes to existing codes or add new codes (refer to "Add a Code Table." on the previous page)
  - Click **Save** to save changes.
  - Click **Go Back** to return to the *Code Tables* page.
- Click **Go Back** to return to the *Form Administration* page.

## Form Delete Log

Deleted form activity is written to the **Form Delete Log** table automatically with the form title, date it was deleted, comments, and the user who deleted the form.

**Note:** This table is read-only.

Use the following procedure to access the **Form Delete Log** table.

1. From the *Form Administration* page, click the Form Delete Log link to open the *Form Delete Log* page as shown.

Form Administration / Form Delete Log

Go Back

**Form Delete Audit**

Show 10 entries Search:

Title	# of Instances	Date Deleted	Comment	User
Fleet Vehicle Fields	0	07/02/2018 1732	i	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1642	i	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1639	i	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1636	i	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1630	i	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1630	i	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1630	i	Joe Friday
SuperHeroes	1	03/06/2017 1600	i	Homer Simpson
Ang Test	0	03/06/2017 1600	i	Homer Simpson
SuperHeroes2	0	03/07/2016 1324	i	Homer Simpson

Showing 1 to 10 of 17 entries

Previous 1 2 Next

2. Hover over or click on the blue information bubble for addition information.

07/02/2018 1630	i	Joe Friday
07/02/2018 1630	i	Joe Friday
test	i	Joe Friday
Click to view Entire Entry	i	Homer Simpson

## Form Editor

The Form Editor opens as shown below, displaying the **Form Details** tab, when you save a new form.



The screenshot displays the 'Form Editor' interface with the 'Form Details' tab selected. The interface is organized into a top navigation bar, a right-hand action bar, and a main configuration area. The 'Form Details' tab is highlighted in red. The main configuration area contains several sections: 'PUBLISH STATUS' (Not Published), 'ACTIVE STATUS' (Inactive), 'TITLE' (Ang Test Custom Form 3), 'DESCRIPTION' (Ang Test Custom Form 3), 'PRINT HEADER' (Ang Test Custom Form 3), 'RESTRICT TO AGENCY' (Click To Select), 'DEFAULT SECURITY LEVEL' (Patrol Supervisor), 'OFFICER ENTRY' (Officer is Required), 'REVIEW REQUIRED' (checked), 'RESTRICT EDIT' (checked), 'ROLES' (CASE\_SUPERVISOR), 'FORM TYPES' (Vehicles), 'FORM ADMINS' (empty), 'SELECTED FORM ADMINS' (empty), 'RESTRICT VIEW ACCESS USERS' (empty), and 'SELECTED USERS' (empty). A 'Save' button is located at the bottom center of the form.

The Form Editor also displays when you select a form to edit from the *Manage Forms* page after accessing it from the *Form Administration* page.

**Note:** The only field that cannot be changed once a custom form is published is the **Restrict to Agency** field. All other fields may be modified as long as the form's status is set to *Inactive*.

The Form Editor has seven tabs:

- The **Forms Details** is shown above. It opens upon initial creation of a form when a user saves a new form from the *Add Form* page. It also allows users to change form details after a form has been created.

- The **Number Generation** tab allows the user to configure number generation formats much like the number generation in other modules in Edit Agency. It also allows the user to enable or disable automatic number generation for custom forms. When enabled, a new Instance Number field containing the generated number displays on the view and edit screens. This number is unique to each customer form.
- The **Field List** tab displays a list of custom fields to be used on the form. From this tab, you can add additional fields and edit existing fields.
- The **Designer** tab is used to position the fields on the form.
- The **Reports** tab is used to specify a report for a form type with which the form is associated, including Incidents, Field Arrests, and Contacts.
- The **Code Tables** tab displays a list of Code Tables that the form uses.
- The **Routing** tab is used to specify the who, what, where, and when of form routing details.
- The **Status** tab is used to publish and activate/deactivate forms. The current status of a form is always displayed on this tab.

Click on the **Exit Form Editor** button on the top right to exit the form editor at any time.

## Form Details Tab

The **Form Details** tab of the Form Editor is used to manage the form title, define what prints as the header on the printed copy, manage form security, require review, and more.

Use the following procedure to complete the information on the Form Details tab.

1. Enter a unique **Title** for the custom form.
2. Optionally, enter a **Description**. This displays to users who are viewing or editing an instance of this form.
3. Optionally, enter the **Printer Header**. This appears on the top of the first page when printing this form.
4. Optionally, **Restrict To Agency**. Leave blank, or select as many as needed.
5. Select the **Default Security Level** from the list provided.
6. Select the **Officer Entry** from the list provided.

7. Optionally, check the **Review Required** box. A notification appears in a yellow box at the top of the *Submit for Review* page requesting a user review a PDF copy of the form before the creator submits it.
8. Optionally, check the **Restrict Edit** box to restrict the creator of an instance of this form from putting it back into edit mode once it has been approved and finalized. Only a user with special permissions is allowed to do so.
9. Select one or more **Roles**.
10. Select one or more **Form Types**.

**Note:** If you wish to use this form without having to attach it to a specific record, select **Freestanding Forms** from this list. This allows users to add new instances of this form in the Forms & Report page.

11. Optionally, select **Form Admins**. Users added to this list can administer this form regardless of agency.
12. Optionally, select **Restrict View Access Users**. Only users added to this list can view, print, and search on this form.
13. Click **Save**.

## Number Generation Tab

The **Number Generation** tab of the Form Editor is used to configure number generation formats (a unique number) much like the number generation in other modules in Edit Agency, or to enable or disable automatic number generation. When enabled, a new Instance Number field containing the generated number displays on the view and edit screens.

### ***Enable Number Generation***

Use the following procedure to enable number generation.

1. From the Form Editor, click on the **Number Generation** tab.

Form Details **Number Generation** Field List Designer Reports Code Tables Routing Status

Enable Number Generation for this form

☐

Save

2. Check **Enable number Generation for this Form** to display additional fields.

Form Details **Number Generation** Field List Designer Reports Code Tables Routing Status

Enable Number Generation for this form

☒

**FORMAT**  
YYYYIR000

**PLACE HOLDER**  
CF

**END DATE**

**NEXT NUMBER**  
1

**EFFECTIVE DATE**  
10/21/2020

Save

- a. Select a **Format** from this list.

**Note:** If the format you want is not listed, refer to the Number Generation tab of "Agency Profile" on page 17.

- b. Enter the **Next Number**; the beginning number of this series of number. For example, if you want the beginning number to be 1, enter 1.
- c. Enter the **Place Holder**. It could be letters or perhaps a hyphen (-). For example, if the number format you are using is YYIR000 and place holder is CF, then CF replaces the IR in the format.
- d. Select the **Effective Date**.
- e. Select the **End Date**, if applicable.
- f. Click **Save**.

**Note:** When Number Generation is enabled, a read-only field with the name **Instance Number** appears on the form containing the auto-generated number upon saving the form.

**Note:** The **Instance Number** also prints on standard Custom Form printouts.

## ***Disable Number Generation***

Use the following procedure to disable number generation.

1. From the Form Editor, click on the **Number Generation** tab.
2. Uncheck **Enable Number Generation for this form**.
3. All formatting fields no longer appear.
4. Click **Save**.

## **Field List Tab**

The **Field List** tab of the Form Editor is used to create fields to be used on a custom form.

*Public facing forms* support the following *Custom Form Field Types*:

- Date
- Date & Time
- Text - Single Line
- Text - Multiple Line
- Checkbox
- Radio Buttons
- Select LOV - Single Value
- Auto Complete

For more information on *Public facing forms*, refer to “Community Reporting with Custom Forms” on page 270.

Use the following procedure to set up fields for a form. Keep the above in mind if you are creating a *Public facing form*.

1. From the Form Editor, click on the **Field List** tab to display the **Name Form**.

Field ID	Label	Field Type	Positioned	Required	Displayed	Comment	Actions
RANDOM_FIELD	Random Field	Text - Single Line	Yes	No	Yes	Don't Specify Comment	[Edit] [Delete]

**Note:** You also open this page when you save a new form on the *Add Form* page, but the list is empty for a new form.

- Click the Add Fields link to open the *Add Fields* page as shown in the following examples.

Go Back Add Another Field

**FIELD TYPE**  
-Select-

**LABEL**

**FIELD ID**

**REQUIRED**  
☐

**DISPLAYED**  
☒

**COMMENT**  
Don't Specify Comment

**HELP TEXT**

Remove Field

Save

- Type values in the **Label** field and select to complete the **Field Type** field.

**Note:** Additional parameters may appear based on the chosen Field Type. For example, if you select the Field Type *LOV*, the required field **Field Code Type** appears and the user must select a value.

- Enter a value in the **Field ID**.
- Check the **Required** box if this field is to be a required field.
- Check the **Displayed** box if this field is to be displayed on the form on screen.
- Select a **Comment**.
- Add content to the **Help Text** box if you want to provide instructions about completing this field.
- You can also perform the following tasks:

- Click the Add Another Field link to add additional fields so that you can quickly add multiple fields without having to leave the page.

- Click **Remove Field** to remove a field.

10. When the required fields have been filled out and all the information is correct, click **Save** to save the new custom fields.

11. The **Field List** tab displays with the new field listed which has **No** displayed in the **Positioned** column.

Field ID	Label	Field Type	Positioned	Required	Displayed	Comment	Actions
ADDCOMMENT	Additional Comment	Text - Single Line	No	No	Yes	Comment Optional	
RANDOM_FIELD	Random Field	Text - Single Line	Yes	No	Yes	Don't Specify Comment	

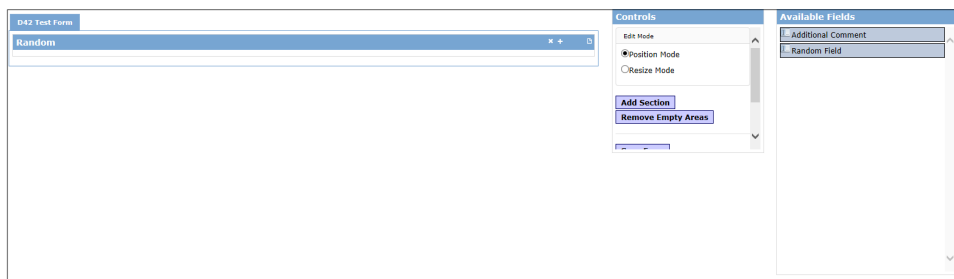
## Designer Tab

The fields that were set up on the **Field List** tab are positioned and sized on a form using the **Designer** tab of the Form Editor. The **Designer** tab allows you to layout a form using a drag/drop user interface.

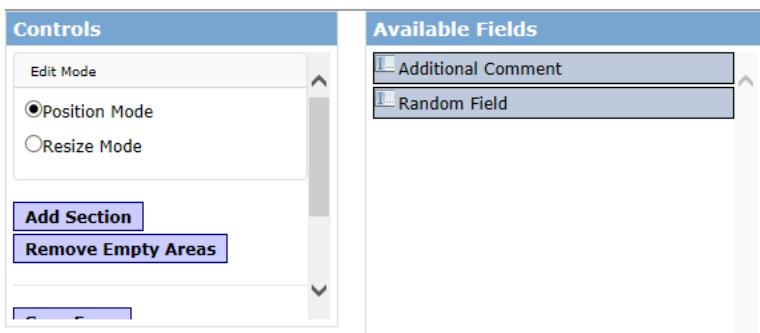
- Use the Position Mode to design the visual layout of a form.
- Use the Resize Mode to adjust the position and size (width) of fields in a row based on a percentage of the total form width.

Use the following procedure to position fields on a form.

1. From the Forms Editor, click the **Designer** tab to open it.
2. Click the Launch Form Designer link to display the form designer page as shown in the example.



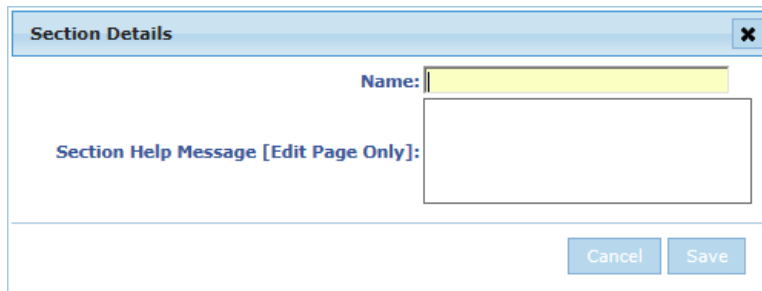
**Note:** This page does not adjust to the size of the browser window. Scroll to the right to see the **Available Fields** list.



You can drag and drop the **Controls** pane and the **Available Fields** list anywhere on the screen. For example, you might want to drag the **Available Fields** list so that it is located below the **Controls** to make it easier to see all the elements of the screen at once. However, should you close the Form Designer then reopen it, the elements appear in their default positions once again.



- Click **Add Section** in the **Controls** pane to display the *Section Details* window as shown.

The image shows a 'Section Details' dialog box. It has a title bar with a close button (X). Inside, there is a 'Name:' label followed by a text input field. Below that is a 'Section Help Message [Edit Page Only]:' label followed by a larger text area. At the bottom right, there are 'Cancel' and 'Save' buttons.

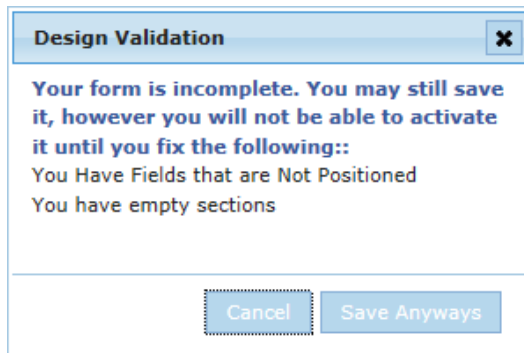
- Type a name for the section in the **Name** field and a **Section Help Message**. Click **Save** to redisplay the page as shown in the example.

The image shows a form design interface. On the left, a form titled 'R12 Test Form' is shown with two sections: 'Test Section' (containing the text 'This section demonstrates how to add a new section.') and 'Random'. On the right, there are two panes. The 'Controls' pane shows 'Edit Mode' and 'Position Mode' selected, with 'Add Section' and 'Remove Empty Areas' buttons. The 'Available Fields' pane shows 'Additional Comment' and 'Random Field'.

- Adjust a section as follows:
  - Click **+** in the far right of the new section to add a row, then drag and drop one or more fields into the row.
  - Click **X** to remove a section.
  - To delete a row from a section, click **X** in to the left of the row in the left margin of the section.
  - Rows can hold multiple fields horizontally; however, if you want to add fields vertically, you must add another row.
  - Both sections and rows can be repositioned. Use the drag and drop method or the up and down arrows.
- Repeat Steps 3 through 5 to add and adjust as many sections as you need for the form.

**Note:** You can remove empty sections if you decide you need fewer sections. You can move sections and/or fields as needed by dragging and dropping, and you can revert at any time to return to the form to the state it was at the time you last saved.

- Click **Save Form** at any time to save the work you have. If the form is not complete, a *Design Validation* box appears giving you the option to save or cancel your design.



- It is important to save often to avoid losing work.
  - If needed, the **Revert** button allows you to return the form as it was the last time you saved.
  - The **Save Form** button label displays in red if any changes have been made since the last save.
8. Click the **Resize Mode** radio button and adjust the horizontal alignment of fields as needed.
- Fields appear where you can enter alignment values. The values in each box represent a percentage of the total form width. To increase the width of a field or label, type a higher number in the box; to decrease the width of a field or label, type a lower number.
9. When you think the form is complete, save and click **Exit Designer** to return to the **Designer** tab of the Forms Editor.
10. Click **Preview** to review your form.
- Use the **Switch to...** button to toggle between **View Mode** and **Edit Mode**.
  - Click the **Print** button to open a pdf version of the form to see it as it will appear when printed.
  - If the form needs changes, click **Exit Preview** then click the Launch Form Designer link to display the form designer page again where you can make changes.

## Reports Tab

The **Reports** tab of the Form Editor is used to specify a report for any Form Type with which a form is associated. Form Types include Incidents, Field Arrests, Field Contacts, and Vehicles. Available options are based on Form Type selections made on the **Form Details** tab. Multiple types may be associated with a form simultaneously.

You have the ability to generate form letters and reports by integrating fillable PDFs.

Use the following procedure to download .jrxml template files.

1. From the Form Editor, click the **Reports** tab to open it.

The screenshot shows the 'Reports' tab selected in the Form Editor. The interface includes a top navigation bar with tabs: 'Form Details', 'Field List', 'Designer', 'Reports' (highlighted), 'Code Tables', 'Routing', and 'Status'. To the right of these tabs are buttons for 'Exit Form Editor' and 'Preview'. Below the tabs, a message states: 'For each type this form is associated to, you may specify reports for it.' followed by a link 'Generate Domain for ALL form types'. The main content area is divided into sections for different form types: 'Cases', 'Citations', 'Court Papers', 'Field Arrests', 'Field Contacts', and 'Freestanding Forms'. Each section contains a list of actions: 'Generate Domain for [Form Type]', 'Get [Form Type] Report Template', 'Create New [Form Type]', and 'Upload Fillable PDF'.

Report Types that were selected on the **Form Details** tab are reflected here.

**Note:** The link titles that appear in blue vary and may not appear exactly as shown in the example.

2. Use the Get...Report Template links to download .jrxml template files of the selected association types. Once they are downloaded you can save the templates then edit them as needed.
3. Optionally use the Upload Fillable PDF link to locate and upload an existing fillable PDF file that has at least one fillable field on it.

**Note:** The agency is responsible for procuring the appropriate PDF license that supports the creation of fillable PDFs.

- Click **Browse** to locate the PDF file, then click **Upload**.

- Enter a report **Name** and select **Default** to display this report on the Custom Form for users to print. Multiple fillable PDFs can be associated to one Custom Form. If only one PDF exists, it prints by default regardless if the **Default** option is checked.
- Click the Add Field link to map the Custom Form fields to the Fillable PDF fields.

A Format String (Token) can be entered for how the data should print, or leave it blank for the default.

For example, for a person the string {FULLNAME} {DOB} could be specified. Labels may also be included by entering the string {TOKEN| Optional label}.

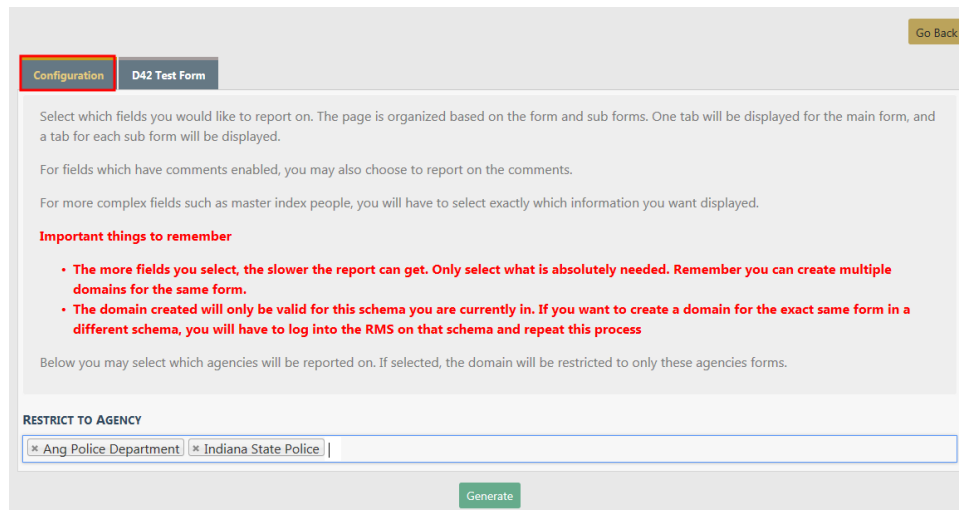
Click on the Blue Info Bubble to view available format options.

**Note:** Tokens are case sensitive.

- Optionally use the individual Generate Domain for... links to select the fields on which to report.

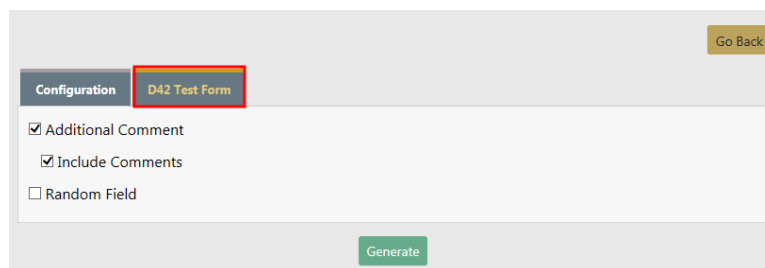
**Note:** Click the Generate Domain for ALL Form Types link to generate them all at once.

- Optionally select agencies on the Configuration tab to include in the report. If no agencies are selected, the report includes all agencies.



The screenshot shows the 'Configuration' tab selected. It contains instructions on how to select fields for reporting, a 'Go Back' button, and a 'Generate' button. Below the instructions, there is a section titled 'RESTRICT TO AGENCY' with a list of agencies: 'Ang Police Department' and 'Indiana State Police'. The 'Generate' button is at the bottom right.

- Click on the second tab and select the fields to include. The title of the second tab is the title you gave the report.



The screenshot shows the 'D42 Test Form' tab selected. It contains three checkboxes: 'Additional Comment' (checked), 'Include Comments' (checked), and 'Random Field' (unchecked). There is a 'Go Back' button at the top right and a 'Generate' button at the bottom right.

- Click **Generate** to generate and download an XML file.
  - In the pop-up window click **Save** to save the XML file to your computer or network, or click **Open** to view the file.
  - Click **Go Back** to return to the previous window.
5. Use any Create New... link to open the *Add Report* page as shown.

**Add Report** Go Back

Report Details

**Report Type:**\* Custom Form Report

**Report Name:**\*

**Description:**

Report Association Details

This report will be associated with the **D42 Test Form** custom form.

Save Go Back

- The **Report Type** field always has the value *Custom Form Report*. This field value cannot be changed.
  - The **Report Name** field is for a name of your choosing used to differentiate between multiple reports of the same report type.
  - The **Description** field allows you to add a description to define the report's purpose.
  - At the bottom of the page is a reminder of the form with which this report is associated.
6. When you have completed the fields, click **Save** to open the *Edit Report* page as shown in the following example.

**Add Report** Go Back

Report Details

**Report Type:**\* Custom Form Report

**Report Name:**\*

**Description:**

Report Association Details

This report will be associated with the **D42 Test Form** custom form.

Save Go Back

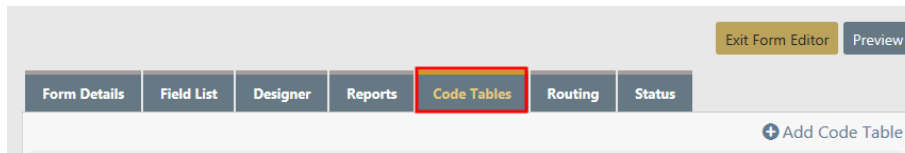
7. If needed, make changes and click **Save**.
8. Click **Exit** to return to the Form Editor as shown in Step 1 with the new report listed in the appropriate grid.


## Code Tables Tab

The **Code Tables** tab of the Form Editor is used to list code tables used by the form for specified lists of values (LOV) fields, or pick lists, fields and to add code tables.

Use the following procedure to add and edit code tables associated with a form.

1. From the Form Editor, click the **Code Tables** tab to open it.



If the form has been set up to use one or more code tables for LOVs fields, the tables are listed here. The **Code Table ID** and, if entered, the **Description** of each table display, and the edit icon  in the **Actions** column provides the ability to edit the table.

2. To add a custom code table, continue as follows:

- Click the [Add Code Table](#) link to open the *Code Table* page as shown.

A screenshot of the 'Code Table Details' form. At the top right is a 'Go Back' button. The form has a title 'Code Table Details'. Below the title is a section labeled 'TABLE IDENTIFIER' with a red vertical bar to its left and an information icon. Below that is a 'DESCRIPTION' section with a text input field. Below the description is a checkbox labeled 'SORT ALPHABETICALLY' with a red note: 'When checked, the codes will be sorted alphabetically regardless of how you enter them.' Below the checkbox is a section labeled 'Codes' with a text input field. At the bottom right is a 'Save' button.

- Complete fields as follows:
  - **Table Identifier** – Enter a label to assign to the code table to differentiate it from other code tables. This label must be all upper case alpha-numeric characters with no spaces. Underscores are allowed. **\_CS\_** must be added to the label as a prefix to conform to the naming convention for code tables. **Note:** This is a required field, and the record is not saved properly without a valid label.
  - **Description** – Enter a description of the custom code table.

- **Sort Alphabetically** – Check the box if you want codes to be sorted alphabetically regardless of how they are entered.
  - Click **Save**.
3. To add a code to the table, continue as follows:
- Click Add New Code to open a **Code** field, a **Label** field, an **Active** box and a delete icon across the bottom of the page as shown.

**Code Table Details**

TABLE IDENTIFIER ⓘ

DESCRIPTION

**SORT ALPHABETICALLY** When checked, the codes will be sorted alphabetically regardless of how you enter them.


☐

**Codes**

CODE	LABEL	ACTIVE	
		<input checked="" type="checkbox"/>	

[Add New Code](#)

**Save**

- Complete the **Code** and **Label** fields.
  - Click **Save**.
4. To edit a code table, click  in the **Actions** column (see example in Step 1 above) to display the *Code Table* page.

**Note:** Code tables can be used by more than one form. A list of forms that use this code table display in the yellow banner in the middle of the page.

5. Continue as follows:
- Make changes to any field or box except the **Table Identifier** field. To change this value, you must delete the table and start over.
  - Use the delete icon to delete any unneeded codes.
  - Click Add New Code to add a new code. (See Step 3.)
  - When changes are complete, click **Save**.

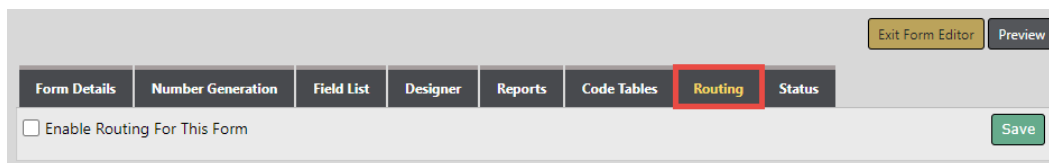


## Routing Tab

Custom forms can be routed in a way similar to Incident Report routing. Notifications are sent to designated users, roles, and/or – in a statewide organization – agencies. From the Form Editor, the administrator can set up one or more levels of routing as needed, entering comments that are included in the notifications sent to routing recipients.

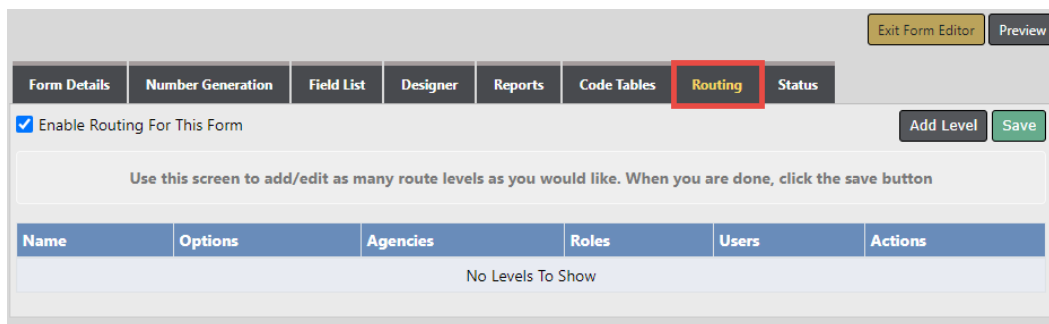
Use the following procedure to set up routing for a custom form.

1. From the Form Editor, click the **Routing** tab to open the tab as shown.



The screenshot shows the Form Editor interface. At the top right are buttons for 'Exit Form Editor' and 'Preview'. Below these is a horizontal tab bar with the following tabs: 'Form Details', 'Number Generation', 'Field List', 'Designer', 'Reports', 'Code Tables', 'Routing' (which is highlighted with a red border), and 'Status'. Below the tabs is a checkbox labeled 'Enable Routing For This Form' which is currently unchecked. To the right of the checkbox is a 'Save' button.

2. Check the **Enable routing for this form** box to enable and display the tab as shown.



The screenshot shows the Form Editor interface with the 'Routing' tab selected and highlighted with a red border. The 'Enable Routing For This Form' checkbox is now checked. To the right of the checkbox are buttons for 'Add Level' and 'Save'. Below the checkbox is a text instruction: 'Use this screen to add/edit as many route levels as you would like. When you are done, click the save button'. Below this instruction is a table with the following columns: 'Name', 'Options', 'Agencies', 'Roles', 'Users', and 'Actions'. The table is currently empty, and below it, the text 'No Levels To Show' is displayed.

**Note:** If routing is not enabled for a form, review submission is not required.

**Note:** With Online RMS11.5 and higher, multi-tier routing has been added to route a form through multiple levels of review.

3. Select the **Add Level** button on the right to open the *Route Level* form.

Route Level

**General Route Options**

**NOTIFICATION TEXT**

Level 2

☐ Require Comment On Submission

☐ Disable Addition of Users

☐ Disable Removal of Users

☐ Disable Addition of Roles

☐ Disable Removal of Roles

☐ Require One User

☐ User may cancel next level (Does not apply to first level)

**User Route Options**

**ADD USER**

**SELECTED USERS** Double Click To Remove

**Role Route Options**

**ROLES**

Search...

Select All Select None

AGENCY\_AD\_HOC\_REPORTING\_TOOL

AGENCY\_ADMIN

CAL\_ADMIN

Cancel Ok

4. In the **General Route Options** section:
  - a. Check the **Require Comment On Submission** box if you want to require a comment when the user submits it.
  - b. Check the **Disable Addition of Users** box if you want to prevent users from adding additional users.
  - c. Check the **Disable Removal of Users** box if you want to prevent users from removing users.
  - d. Check the **Disable Addition of Roles** box if you want to prevent users from adding additional roles.
  - e. Check the **Disable Removal of Roles** box if you want to prevent users from removing roles.
  - f. Check the **Require One User** box to require the selection of a user at time of route generation.
  - g. Check the **User may not cancel next level (Does not apply to first level)** box if you do not want users to cancel the next level.
5. In the **User Route Options** section, specify which users are to receive notifications. Click into the **Add User** box and begin typing a user's name, then select the appropriate user from the list. The selected user appears in the **Selected Users** box

automatically. **Double-click** on a **Selected User** to remove them from the selected list.

6. In the **Role Route Options** section establish which users are to receive notification by role.
  - a. Choose **Roles**.
  - a. Choose **Agencies**.

**Note:** Statewide organizations also have the ability to choose route to specific agencies. If no agency is selected, the form automatically routes to the form creator's agency.

7. Click **Ok** to add the route to the Routing tab.

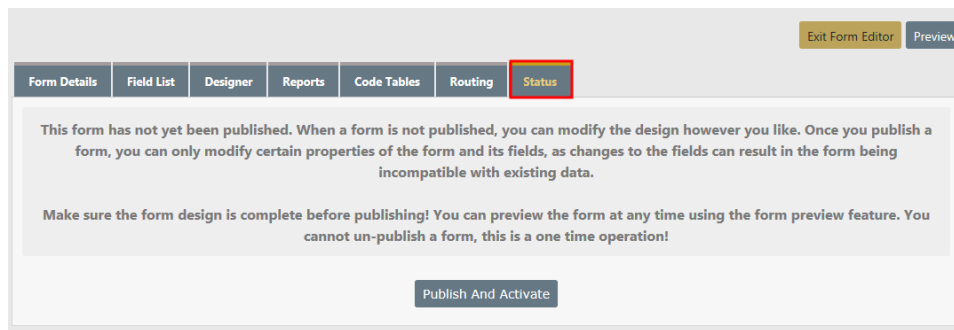
Name	Options	Agencies	Roles	Users	Actions
Level 1	<b>Comment Required:</b> Yes <b>Disable Add:</b> No <b>Disable Remove:</b> No <b>Can Cancel:</b> No	District 21, Toll Road - SC District 42, Versailles	LEA_CLERK OFFICER OFFICER_SUPERVISOR	Benjamin (cid) Harrison Ralph Lauren	

**Note:** Clicking **Ok** creates your route level only. To save your changes to the database, you must also click the **Save** button when finished adding route levels.

8. Optionally, click the **Add Level** button again to add an additional level, and repeat until all desired levels are complete.
9. Click **Save** to commit your changes to the database.

## Status Tab

From the Form Editor, click the **Status** tab to open it. The **Status** tab is used to publish and activate the form. Current status of the form is always displayed on this tab. It is important that the form is 100% complete and ready to be used before publishing it because some details cannot be changed after the form has been published.



The screenshot shows the 'Status' tab selected in the Custom Forms editor. The tab bar includes 'Form Details', 'Field List', 'Designer', 'Reports', 'Code Tables', 'Routing', and 'Status'. The 'Status' tab is highlighted with a red border. The main content area contains the following text:

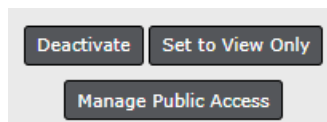
This form has not yet been published. When a form is not published, you can modify the design however you like. Once you publish a form, you can only modify certain properties of the form and its fields, as changes to the fields can result in the form being incompatible with existing data.

Make sure the form design is complete before publishing! You can preview the form at any time using the form preview feature. You cannot un-publish a form, this is a one time operation!

At the bottom of the content area is a button labeled 'Publish And Activate'.

The **Publish and Activate Form** button is available only if the form has not yet been published. Click it to set the Published Status to *Published* and the Active Status to *Active*.

The following buttons appear once the form has been published:



The screenshot shows three buttons arranged in a light gray box:

- Deactivate
- Set to View Only
- Manage Public Access

## Community Reporting with Custom Forms

In response to COVID-19, Caliber Public Safety is offering a new product feature with Online RMS 11.3.2 to support **Community Reporting** of minor crimes, tips, and other police-related events. The **Community Reporting** feature leverages the power of Online RMS *Custom Forms* for your agency to embed a public form in an existing website using only a couple lines of HTML code.

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

### Benefits of **Community Reporting**:

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

This section provides instructions on how authorized Caliber Online RMS users administer and configure the **Community Reporting** feature.

## Agency Responsibilities

The following are the responsibilities of the agency when requesting the **Community Reporting** feature and implementing *Public Custom Forms*:

- Contact your *Caliber Customer Success Manager (CSM)* or enter a support request to sign-up for **Community Reporting**.
  - Caliber will add the **Community Reporting** (*Public Custom Form*) feature to your agency setup.
- Agency administrators are responsible for creating and managing *Custom Forms* or assigning privileges to other agency personnel to create and manage *Custom Forms* for public availability.
- Maintain and manage your agency's existing public-facing agency website.
- Modifications to your agency's website to add **Community Reporting**.
  - Caliber recommends that a system or website administrator perform the modifications.

Once your agency has access to the **Community Reporting** feature, follow these steps to implement *Public Custom Forms*:

1. "Permissions and Settings" on page 272.
2. "Number Generation" on page 273.
3. "Maintenance Values" on page 275.
4. "Make Custom Forms Publicly Available" on page 277.
5. "Add Publicly Available Forms To Your Website" on page 282.

For an example of what the implemented *Public Custom Form* looks like on the website, refer to "Sample Public Custom Form Website Display" on page 284.

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

## Permissions and Settings

There are two permission categories for public form access and management:

- *User Form Admin - Make Publicly Available*
- *User Forms - Create Incident Form From*

### ***User Form Admin - Make Publicly Available***

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

The screenshot displays the 'Permissions' section of the Online RMS interface. It features a 'Permission Description' header and a 'Status' tab. Below the tab, there is a message: 'This form is published and active. If you wish to make changes to the forms fields or layout, you must first deactivate it. The form will not be deleted, rather it will be made unavailable to users while you make changes to it. Once you are done making changes, you can activate the form once again. You can also set the form to view only mode, which means forms already entered can be viewed and printed, but new forms cannot be added.' At the bottom, there are three buttons: 'Deactivate', 'Set to View Only', and 'Manage Public Access'.

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

**Note:** For more information on Permission Categories, refer to “Permission Categories” on page 173.

**Note:** For more information on Roles, see “Roles” on page 77 .

### ***User Forms - Create Incident From Form***

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

public.

The screenshot shows a web interface with two main sections. The top section, titled 'Permissions', has a blue header 'Permission Description' and a light blue box containing the text 'User Forms - Create Incident From Form'. The bottom section is a form with a grey header bar containing three buttons: 'Approve Form' (with a thumbs up icon), 'View Form' (with an eye icon), and 'Attachments' (with a paperclip icon). Below the header is a 'COMMENT' text area. At the bottom of the form is a 'CREATE INCIDENT' button, which is highlighted with a red rectangle and has a small square icon next to it. A green 'Save' button is located in the bottom right corner of the form.

## Number Generation

The **Create Incident** option from publicly available *Custom Forms* requires that your agency has an active *Number Generation format* configured.

**Note:** For more information on the **Create Incident** option, refer to “Permissions and Settings” on page 272.

If your agency does not have an active *Number Generation format* configured, select one of the following options to generate an incident report from a publicly available custom form:

### ***Generate Incident Number from Online RMS (Recommended)***

1. On the Number Generation tab of the *Agency Profile*, create a *Number Generation format* with **Incident** as the *Type*.

**Note:** For detailed instructions on creating a *Number Generation format*, refer to “Add Number Generation” on page 23.

2. Once configured, users see that the Report Number auto-generates when selecting **Create Incident** from a publicly available custom form.

### ***Manually enter Incident Number from CAD***

This option is for agencies that use a CAD System to generate Incident and Case Report numbers for Online RMS.

**Note:** With this option, you need to request a case number from CAD or self-generate from Caliber Mobile.

1. An additional setup is required to configure Online RMS to avoid the creation of an RMS incident report from a CAD spill. This prevents the Case number from generating an incident report in Online RMS before the officer has a chance to generate the incident report from the publicly available *Custom Form*.
  - a. In *Caliber CAD*, create a **Tracking Number Generator** for **Community Reports Submitted by the public** and configure a **Type Code**.
  - b. In *Online RMS*, update **XML Doc Options** for the **CAD Interface** to ignore the **Case Tracking Number** generator **Type** configure for *Community Reports*. Option code of IGNORE\_INCIDENT\_TYPES.

**Note:** If you need assistance, please call *Caliber Customer Support*.

2. In *Online RMS*, create a **Number Generation format** on the Number Generation tab of the *Agency Profile*, following [#GenerateIncidentNumberFromRMS](#) with two exceptions:
  - a. Select a **Format** that matches the **Tracking Number** format configured in *Caliber CAD*.
  - b. Enter **0** (zero) in the **Next Number** field.
3. Once configured, users are required to type the number provided from *Caliber CAD* when selecting **Create Incident** from a publicly available custom form to generate the incident report in *Online RMS*.



The screenshot shows a web interface with three tabs: 'Approve Form', 'View Form', and 'Attachments'. Below the tabs is a 'COMMENT' section with a text area containing 'Reviewed community submission and creating incident report to document offense reported.' Below the comment is a 'CREATE INCIDENT' section with a checked checkbox and a note: 'Upon Creation, this form will be associated with the incident. Any information entered here can be changed later.' At the bottom, the 'REPORT NUMBER OPTIONS' section is highlighted with a red box. It contains two radio buttons: 'Enter a # to generate a report number for the current year' (selected) and 'Enter a full # in the format YY-000000'. Below these options is a 'REPORT NUMBER' text input field.

## Maintenance Values

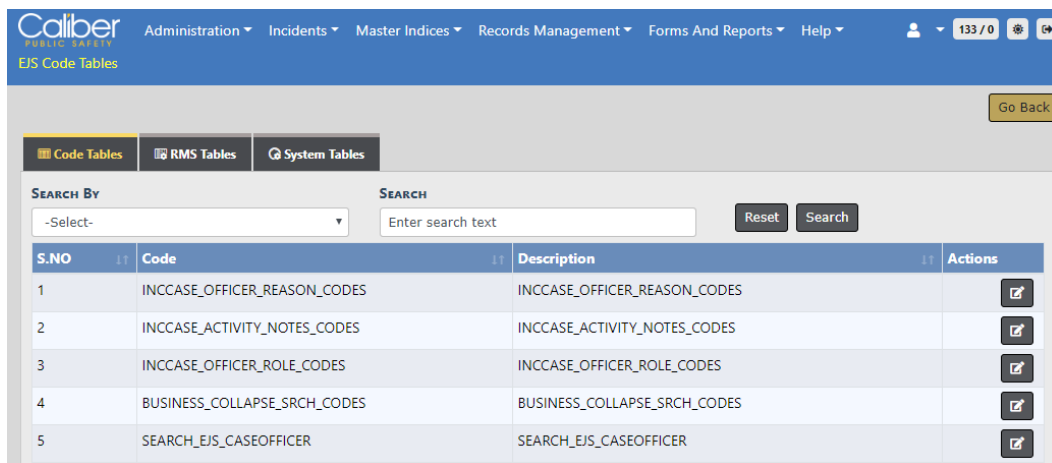
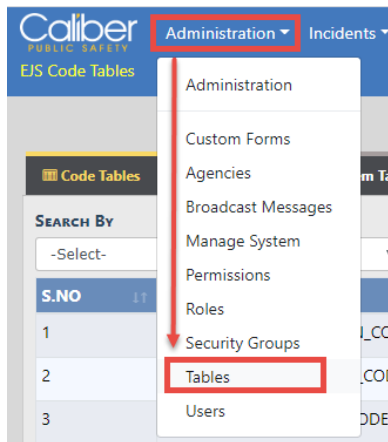
### Set the Default Incident Type for Incident Reports

For agencies using **Incident Report Types**, a new **Agency Maintenance** setting is available to default the **Incident Type** for Incident Reports created from a publicly available *Custom Form*.

Schema Maintenance Values		
Show 10 entries		
Keyword	Value	Description
FORM_INCIDENT_DEFAULT_TYPE	BLANK	Default Incident Type When Creating an Incident from a Custom Form. BLANK is used as a default value when no setting is desired

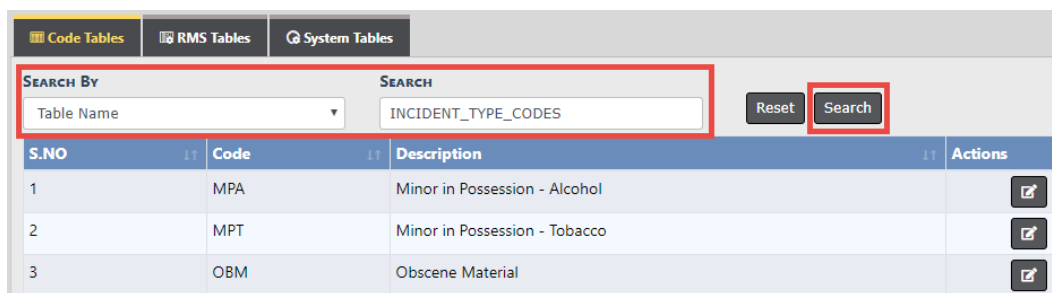
With appropriate permissions, you can apply settings by following these steps:

1. Click on **Administration** on the top menu, then click **Tables** to open *ES Code Tables*.



There are three tabs. The *Code Tables* tab opens by default.

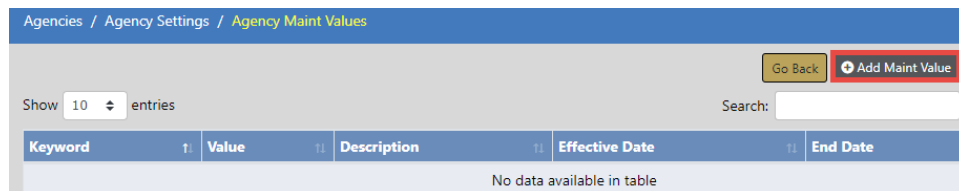
2. Select **Table Name** as *Search By*, enter **INCIDENT\_TYPE\_CODES** in the *Search text box*, then click the **Search** button to display the INCIDENT\_TYPE\_CODES list.



3. Locate the **Incident Type** or **Code** you want to associate with the *Public Custom Form*.
  - a. If the **Incident Type** *exists*, make note of the Code and proceed to the next step.
  - b. If the **Incident Type** *does not exist*, and you have the proper permissions, add a new **Incident Type**, then proceed to the next step.

4. Enter the **Code** as a *Maintenance Value*.

- a. Access the *Maintenance Value* table through the Agency Profile.  
For instructions, refer to “Access Maintenance Values” on page 340.
- b. Click the **Add Maint Value** button to open the *Add Maintenance Value* dialog box.



- c. In the *Add Maintenance Value* dialog box, select the **Keyword** *FORM\_INCIDENT\_DEFAULT\_TYPE* and enter the Code as the **Value**.

- d. Click **Save**.

## Make Custom Forms Publicly Available

**Community Reporting** leverages the power of Online RMS *Custom Forms*, allowing agencies to create and manage their publicly available forms.

Follow these steps to make *Custom Forms* publicly available:

1. Create a *Custom Form* containing fields you wish to present to the public.

For more information on *Custom Forms*, refer to “Custom Forms” on page 235.

### Publicly Displayed Data

In addition to *Custom Form* data fields, the following appears on the agency's web page when the *Custom Form* displays to the public:

- Custom Form **Title** and **Description** fields from the *Form Details* tab.

- **Help Text** for each Field Type.

- Form **Section Groups** from the *Designer* tab.

## 2. Configure **Default Security Level**, **Roles**, and **Form Types** on *Form Details* tab.

- Set the **Default Security Level** at a level equal to the lowest level of the user security you want to access the form.

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

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

FORM TYPES  ?

× Freestanding Forms × Incidents

3. Configure **Routing** on the *Routing* tab.

- a. Check the **Enable Routing for this form** checkbox.

Form Details Field List Designer Reports Code Tables **Routing** Status

Enable routing for this form ☒

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

**Routing Options**

**REQUIRE COMMENT ON SUBMISSION**  
☐

**MANDATORY - USER MAY NOT REMOVE THE SELECTED USERS/ROLES**  
☐

**USER MAY NOT ADD ADDITIONAL USERS/ROLES**  
☐

- c. Select **User Routing Options**. Select individual users to notify when a public form is submitted.

**User Routing Options**

**ADD USER**

**SELECTED USERS** Double Click To Remove

- Benjamin (cid) Harrison
- Ralph Lauren

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

**Role Routing Options**

**ROLES**

- × LEA\_CLERK
- × LEA\_RECORDS\_MGMT
- × OFFICER
- × OFFICER\_SUPERVISOR

- e. Select **Agencies**.

Leave blank to route to the agency defined on the Token for the public available *Custom Form* (**recommended**).

Add an agency if you wish to route to a different agency than designated on the Token for the public available *Custom Form*.

**AGENCIES** No Agency Selection will route the form to the agency it was created in.

Click To Select

4. Configure **Manage Public Access** on the *Status* tab.

- a. Select the **Manage Public Access** button.

**Note:** This button only appears for users having a role with the *User Form Admin - Make Publicly Available* permission.

Form Details | Field List | Designer | Reports | Code Tables | Routing | **Status**

This form is published and active. If you wish to make changes to the forms fields or layout, you must first deactivate it. The form will not be deleted, rather it will be made unavailable to users while you make changes to it. Once you are done making changes, you can activate the form once again. You can also set the form to view only mode, which means forms already entered can be viewed and printed, but new forms cannot be added.

Deactivate Set to View Only

**Manage Public Access**

- b. Select the **Create Token** button on the upper right.
- c. Select the **Agency** as the agency to **Save** for this *Custom Form*.

The form routes to this agency, unless a different agency is specified on the *Routing Options* tab.

- d. Enter **Allowed Domain(s)**.

This is the domain of the agency's website, where the public form is available. For example, if your website is [www.myagency.com](http://www.myagency.com), you would enter *www.my-agency.com* for **Allowed Domains**.

Create Public Access Token

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

**SELECT AN AGENCY**

City Police Department

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

myagency.com

Cancel Save

- e. Click **Save**.
- f. A unique **Token ID Number** generates for the agency and form combination upon saving.
- g. **Copy** the Token by **using your mouse to highlight the Token**, then pressing **Ctrl + C** keys on your keyboard at the same time.

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

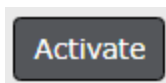
- h. For **multi-tenant sites or agencies** configured as an Organization with sub-agencies, the same *Custom Form* can be made publicly available on different websites or web pages within the same website to route public submissions of the form to various agencies.

Select the **Create Token** button and enter the information to generate a unique Token for each agency and website/page combination, then enter the Token on the appropriate web page.

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

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

5. When finished with the *Custom Form*, click on the *Status* tab and select the **Activate** button.



**Note:** *Public Custom Forms* are not accessible from your website until the form is activated.

**Note:** If a *Public Custom Form* is not activated, the public will see the below error when navigating to the web page you configured to display the Public Form:



#### ERROR RETRIEVING FORM: 404

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

Environment: demo

Is the form active for Public Access?

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

## Add Publicly Available Forms To Your Website

**Community Reporting** easily displays within your agency's existing website, creating a consistent online experience for your community to submit report online. **Publicly Available Custom Forms** inherit the look and feel of its surroundings on your website, making it appear as if it were an original part of your web page.

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

### Web Page Modifications

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

Below is a simplified example of a web page and how it should be modified to enable **Community Reporting**.

- The **id** is the **Token ID** generated for the *Custom Form* in Online RMS.
- The **id="12345678-abcd-1234-abcd-1234567890ab"** in the **<caliber-custom-form** section must be changed to use the **Token** generated for your *Custom Form* in Online RMS.

For more information on the generated **Token ID**, refer to “Make Custom Forms Publicly Available” on page 277.

- The yellow highlighted lines must be added to your existing website.



```
<html>
  <head>
    <!-- (Existing content) -->
    <!-- ... -->
    <!-- Add the following line for Caliber Community Reporting -->
    1 <script src="https://community.public-safety-cloud.com/assets/custom-form-bundle.js"
      crossorigin="" > </script>
  </head>
  <body>
    <!-- (Existing content) -->
    <!-- ... -->
    <!-- In the desired location, add the following line for Caliber Community Reporting -->
    2 <caliber-custom-form id="12345678-abcd-1234-abcd-1234567890ab">
      </caliber-custom-form>
    <!-- ... -->
  </body>
</html>
```

1. Modification labeled **1** tells the internet browser where to find the JavaScript that displays the *Custom Form* from Online RMS.

**Note:** Do not modify the contents of this line. Any changes to this line may cause the *Custom Form* not to display and may break other functionality of your web page.

2. Modification labeled **2** identifies the location in your existing website where the *Custom Form* should display.

**Note:** You **MUST** update the `id="12345678-abcd-1234-abcd-1234567890ab"` to use the **Token** generated for your *Custom Form*. For more information on the generated **Token**, refer to “Make Custom Forms Publicly Available” on page 277.

## Display Configuration Options

There are four (4) *optional* configuration settings that can be added to the `<caliber-custom-form...></caliber-custom-form>` line.

Configuration options with their default values:

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

If you desire different display options than the default values, you can override the default values by adding the appropriate configuration option to the `<caliber-custom-form...></caliber-custom-form>` line and setting the value to `"true"`.

### Example 1

If you do not want to display the **Custom Form Title** on the web page, use `hide-title="true"`. The **id** is the **Token ID** generated for your *Custom Form*.

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

### Example 2

Example of all available configuration options. The **id** is the **Token ID** generated for your *Custom Form*.

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

For more information on the generated **Token**, refer to “Make Custom Forms Publicly Available” on page 277.

For an example of how a *Public Custom Form* display on your agency website, refer to “Sample Public Custom Form Website Display” on page 284.

## Sample Public Custom Form Website Display

*Publicly Available Custom Forms* inherit the look and feel of its surroundings on your website, making it appear as if it were an original part of your web page.

Below is an example of how a *Public Custom Form* displays on your agency website:

The screenshot shows a web browser window displaying the 'Online Police Self-Reporting Form' on the Caliber Public Safety website. The browser's address bar shows 'Community Reporting | Caliber'. The website's navigation bar includes links for 'Solutions', 'Services', 'About Caliber', 'Contact', and a 'Request A Demo' button. The form itself has a title 'Online Police Self-Reporting Form' and a detailed description. Below the description is a section titled 'Questions' containing several yes/no questions and a text input field for suspect information. Annotations with red boxes and arrows point to the 'Title', 'Description', 'Section Headers', and 'Questions' sections of the form. A right-hand sidebar contains contact support information, including a phone number, email, and a 'CONTACT SALES' button.

**Title** → **Online Police Self-Reporting Form**

**Description** → IF THIS IS AN EMERGENCY PLEASE DIAL 911 NOTE: In the event that this involves shoplifting, you may be asked to come to the Police Department at a later date to file charges and you may also be asked to provide additional documentation regarding the statement or receipt of the stolen items. Once submitted, you will be contacted by a representative of the Police Department within 5 business days. If you have not heard from someone within 5 business days, please call 662-393-8652 to check the status of your report.

**Section Headers** → **Questions**

**Questions** →

(\* Denotes Required Fields)

Do you know that filing a false police report is a crime? \* ☐ Yes ☐ No

Are you eighteen (18) years of age or older? \* ☐ Yes ☐ No

Did the incident occur within the City limits? \* ☐ Yes ☐ No

Do you know who committed this crime? \* ☐ Yes ☐ No

If yes, provide any known suspect information

**CONTACT SUPPORT**  
1-800-274-2911  
Get online support and explore the tips, tricks and helpful documents in the Caliber Wiki.  
**Requests for Proposals**  
We look forward to the opportunity to earn your business. Please forward all requests for bids to our Bid Group.  
info@caliberpublicsafety.com  
**CONTACT SALES**  
Looking for a career?

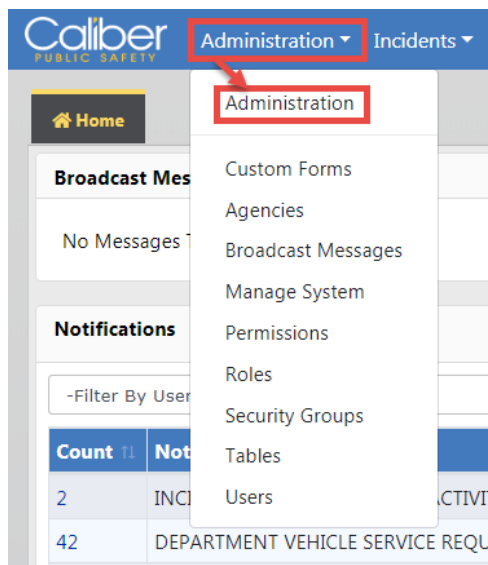


# Chapter 16. Module Admin

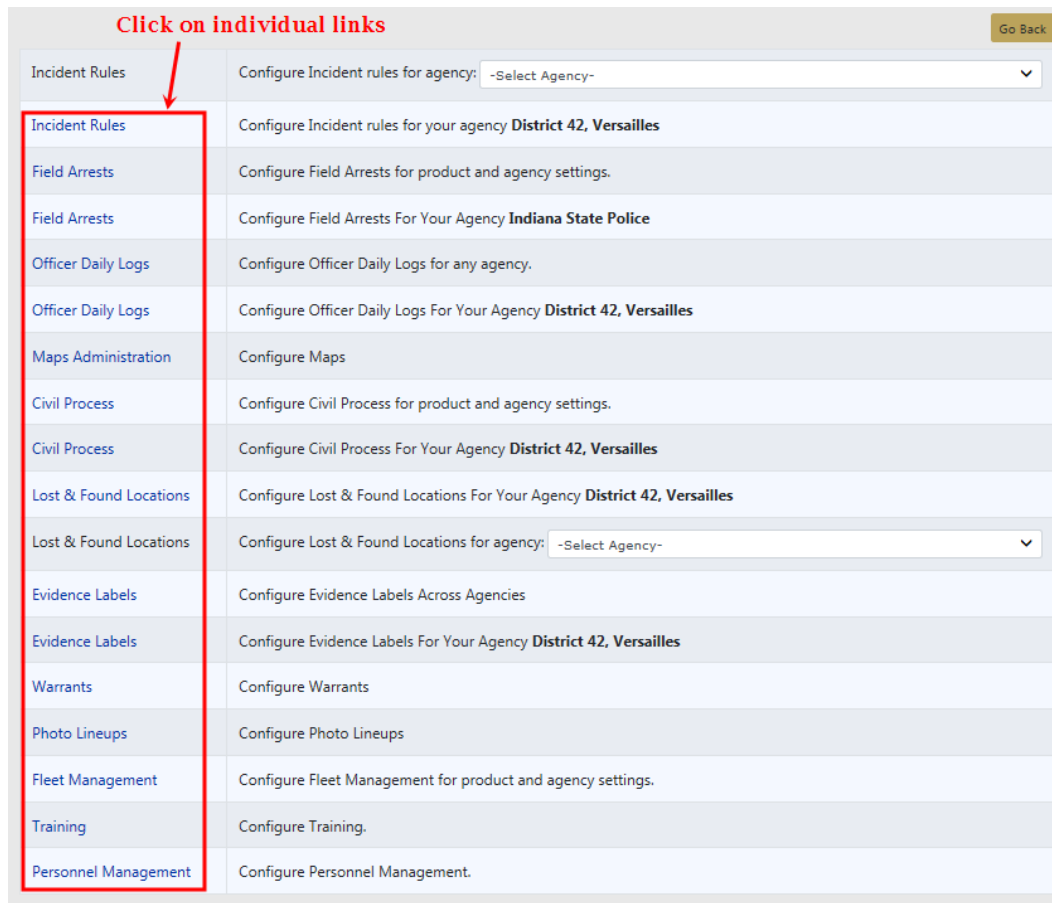
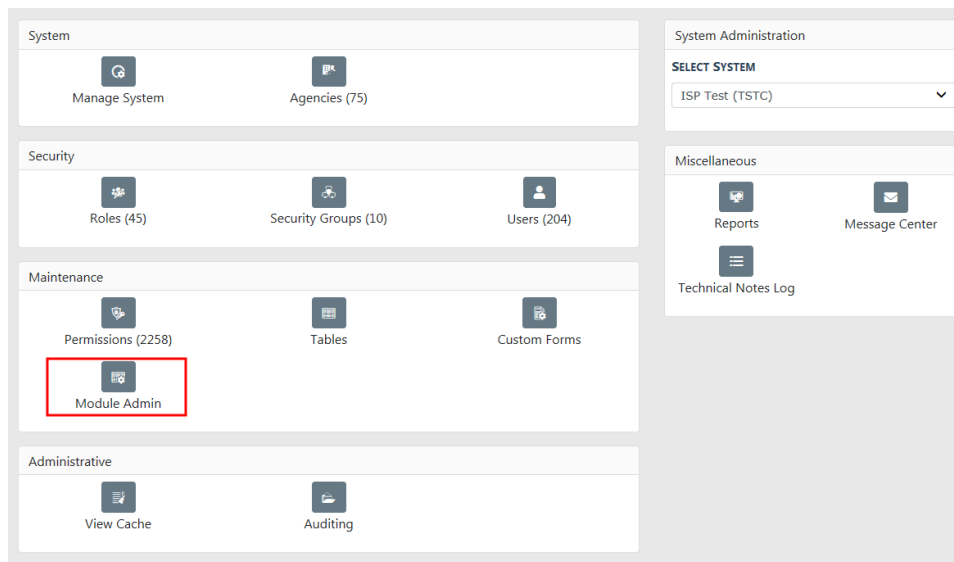
The Module Admin feature must be enabled by Caliber Public Safety personnel in order for an agency to use it. In addition, only administrative users who have been assigned the appropriate role can access and manage the Module Configuration page.

## Access Module Admin

Click on the **Administration** label, then **Administration** again, to access the *Administration Home* page.



Click the **Module Admin** link to open the *Module Configuration* page.



The column on the left of the *Module Configuration* page contains links to individual topics. Click on an individual link to open a unique configuration page for that topic.

**Note:** For multi-level agencies, administrators with appropriate permissions can choose a specific agency within their organization when managing *Incident Rules* and *Lost & Found Locations* configurations.

*Civil Process*, *Fleet Management*, and *Training* are used for illustration purposes; the remaining configuration setting options follow a similar process only with different data requirements.

## Civil Process Product Settings

Product configuration options include the following:

- Court Paper Types
- Court Paper Sub-Types
- Reference Types
- Other Party Roles
- Party/Org Roles
- Payment Types
- Log Action Types

To manage these options from the *Module Confirmation* page, click the Civil Process link with *product and agency settings* in the description. For instructions on accessing the *Module Confirmation* page refer to "Access Module Admin" on page 287.

Civil Process	Configure Civil Process for product and agency settings.
Civil Process	Configure Civil Process For Your Agency <b>District 42, Versailles</b>

The *Product Config* table opens with the seven configuration options in separate tabs across the top, resting on the **Court Paper Types** tab by default.







Administration / Module Configuration / Civil Process Configuration

**Civil Process Product Administration** Go Back

Seven Tabs

[Court Paper Types](#)
[Court Paper Sub-Types](#)
[Reference Types](#)
["Other" Party Roles](#)
[Party/Org Roles](#)
[Payment Types](#)
[Log Action Types](#)

+ Add Court Paper Type Code

Code	Description	Active	Details	Actions
OP	Civil Protection Order	Yes	<ul style="list-style-type: none"> <li>Child Support</li> <li>Civil</li> <li>Criminal</li> <li>Domestic Violence</li> <li>Emergency Order</li> <li>Interim Order</li> <li>Juvenile</li> <li>Petition to Revoke Probation</li> <li>Preliminary</li> </ul>	 
NTA	Notice to Appear	Yes	<ul style="list-style-type: none"> <li>Child Support</li> <li>Civil</li> <li>Criminal</li> <li>Domestic Violence</li> <li>Emergency Order</li> <li>Extradition</li> <li>Interim Order</li> <li>Jury Trial</li> <li>Juvenile</li> </ul>	 
ORD	Order	Yes	<ul style="list-style-type: none"> <li>Child Support</li> <li>Civil</li> <li>Criminal</li> <li>Domestic Violence</li> </ul>	 

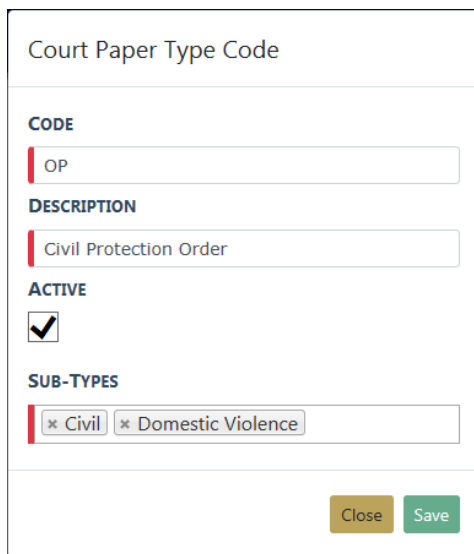
Click on the individual tabs to access the different options. With the appropriate permissions, you can add, edit, and delete settings within each tab. While the data differs with each configuration option, the functionality remains consistent.

The **Court Paper Types** option is used for illustration purposes.

### Add Court Paper Type Code

1. Click on the Add Court Paper Type Code link to display the *Court Paper Type Code* entry form.





Court Paper Type Code

**CODE**

OP

**DESCRIPTION**

Civil Protection Order

**ACTIVE**

☒


**SUB-TYPES**

× Civil × Domestic Violence

Close Save


2. Enter the **Code** and **Description**.
3. The **Active** box is checked by default. Deselecting this button allows you to save the information entered and activate the Court Paper Type at a later date.
4. Select all **Sub-Types** that apply.
5. Click **Save** to save the record and return to the *Product Config* table., or click **Close** to cancel without saving.

### ***Edit Court Paper Type Code***

1. Locate the record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Court Paper Type Code* page.
3. Make changes as needed.
4. Click **Save** to save changes and return to the *Product Config* table.

### ***Delete Court Paper Type Code***

1. Locate the record you need to delete from the table.

2. Click  in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Product Config* table.

## Civil Process Agency Settings

On the *Module Confirmation* page click the Civil Process link with your agency's name in the description. For instructions on accessing the *Module Confirmation* page refer to "Access Module Admin" on page 287.

Civil Process	Configure Civil Process for product and agency settings.
Civil Process	Configure Civil Process For Your Agency <b>District 42, Versailles</b>

The Configuration page appears.



Check the **Fee**

**Collections** box to enable, or uncheck to disable, then click **Save**.

Click **Zero Fees** to zero out existing court paper fees.

Click **Manage Court Locations** to manage Court Locations. For detailed instructions refer to "Court Locations" on page 218.

Click the **Go Back** button on the upper right of the page to return to the *Module Configuration* page.

## Fleet Management Settings

Configuration options include the following:

- Equipment Types
- Vehicle Status, Vehicle Category, Vehicle Assignments, Vehicle Groups, Vehicle Repairs, and Vehicle Ratings
- Category Roles
- Misc IDs
- Vendors and Funding Vendors
- Service Request Types and Service Request Status
- Storage Locations
- Budget Codes
- Fuel Types and Fuel Payments
- Fluid Types
- Inspection Types and Inspection Status
- Insurance Claim Types
- Crash Hours Groups
- Crash Damage Codes
- Crash Cause Codes
- Crash Reference Types
- Crash Types Codes

To manage these options from the *Module Confirmation* page, click the Fleet Management link. For instructions on accessing the *Module Confirmation* page refer to "Access Module Admin" on page 287.

Fleet Management	Configure Fleet Management for product and agency settings.
Training	Configure Training.

The *Product Config* table opens with the configuration options in separate tabs across the top, resting on the **Equipment Types** tab by default.

Administration / Module Configuration / Fleet Management Configuration

**Fleet Management Administration** Go Back

**Tabs**

Equipment Types | Vehicle Status | Vehicle Category | Category Roles | Vehicle Assignments | Vehicle Groups | Misc IDs | Vendors

Funding Vendors | Vehicle Repairs | Service Request Types | Service Request Status | Storage Locations | Budget Codes | Vehicle Ratings

Fuel Types | Fluid Types | Fuel Payments | Inspection Types | Inspection Status | Insurance Claim Types | Crash Hours Groups

Crash Damage Codes | Crash Cause Codes | Crash Reference Types | Crash Type Codes

[Add Equipment Type](#)

Code	Description	Active	Actions
EQTYPE_3	FIRST_AID_KIT	Yes	
EQTYPE_5	HANDCUFFS	Yes	
EQTYPE_1	RADAR	Yes	
EQTYPE_2	RADAR_GUN	Yes	
EQTYPE_4	SHOTGUN	Yes	
STAND_EQUIP	standalone equipment	Yes	

Click on the individual tabs to access the different options. With the appropriate permissions, you can add, edit, and delete settings within each tab. While the data differs with each configuration option, the functionality remains consistent.

The **Equipment Types** option is used for illustration purposes.

## Add Equipment Types

1. Click on the Add Equipment Type button to display the *Equipment Type* entry form.

Equipment Type

CODE

DESCRIPTION

ACTIVE


☒

Close Save


2. Enter the **Code** and **Description**.

3. The **Active** box is active by default. Deselecting this button allows you to save the information entered and activate the Equipment Type at a later date.
4. Click **Save** to save the record and return to the *Product Config* table., or click **Close** to cancel without saving.

### ***Edit Equipment Types***

1. Locate the record you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Equipment Type* page.
3. Make changes as needed.
4. Click **Save** to save changes and return to the *Product Config* table.

### ***Delete Equipment Types***

1. Locate the record you need to delete from the table.
2. Click  in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Product Config* table.

## **Training Settings and Configuration**

Configuration options include the following:

- Course Templates
- Maintenance Settings (List courses and certifications that are about to expire within a set number of days)
- Course Types
- Course Classifications

To manage these options from the *Module Confirmation* page, click the Training link. For instructions on accessing the *Module Confirmation* page refer to "Access Module Admin" on page 287.

Fleet Management	Configure Fleet Management for product and agency settings.
Training	Configure Training.

For details on settings and configurations refer to "Training Module" on page 149.

# Chapter 17. Collapse Duplicate Master Indices

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

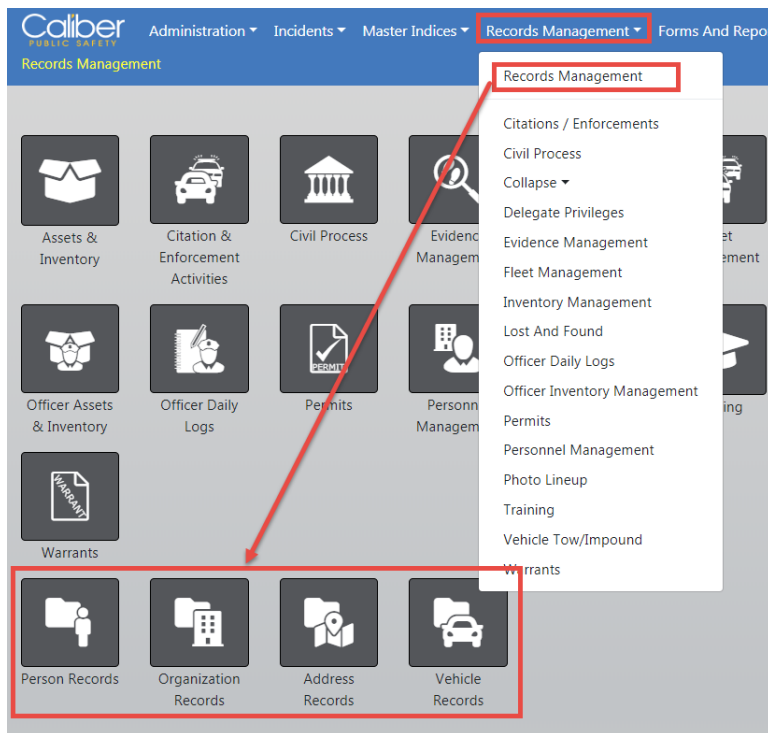
There may be times when users inadvertently create a duplicate master person, address, vehicle, or organization in Caliber Public Safety Online RMS. The agency administrator, with proper permissions, can identify and collapse duplicates records, creating one master person, address, or organization record.

## Access Collapse Process

There are two ways to access the **Collapse** process.

### Option 1

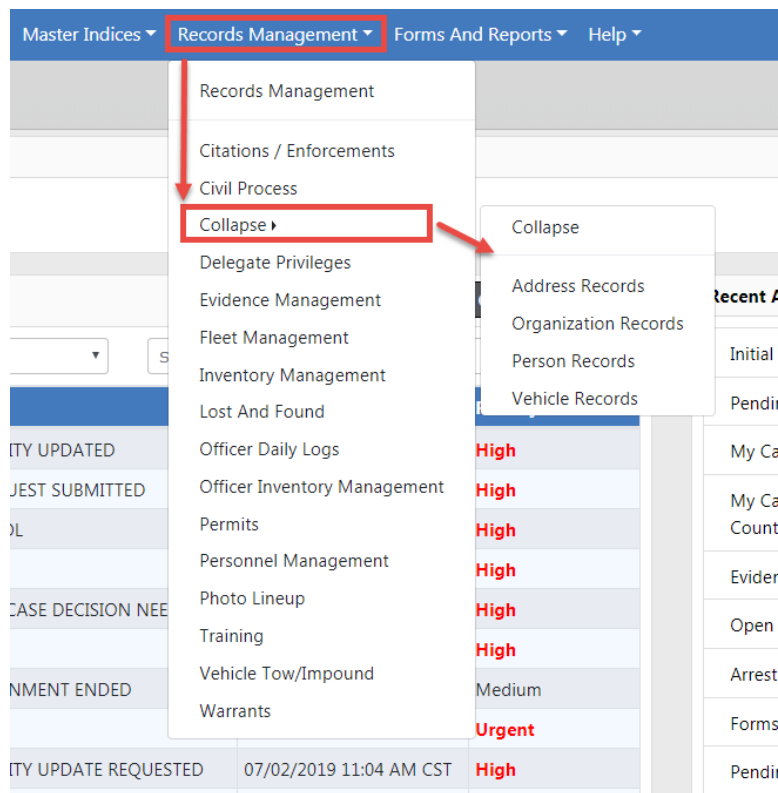
Click on the *Records Management* label and *Records Management* again, then click the appropriate icon that corresponds to the Master Index you want to collapse.



### Option 2

Select **Person Records**, **Address Records**, **Organization Records**, or **Vehicle Records** from the **Records Management** drop down menu.





## Search for Duplicate Master Indices

Use the following procedure to search for potential Master Index duplicate records. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization using different search criteria.

1. Access **Person Records** to open the *Select - Collapse Criteria* page to search for potential duplicates. (See "Access Collapse Process" on page 297, if needed.)

A screenshot of the 'People Collapse' form in the software. The form has a title bar 'People Collapse' and a 'Collapse Log' button in the top right. Below the title bar is a section titled 'SELECT A CRITERIA TO PROCESS COLLAPSE'. This section contains two radio button options: 'Select a Person' (which is selected) and 'Specify Person Details to search for potential duplicates'. At the bottom of the form are two buttons: 'Go Back' and 'Continue'.

2. You must select one Master Person record as the *primary* record, and at least one Master Person record as the *duplicate*.

You can either manually search for and identify the duplicates, or you can let the system search for potential duplicates based on the search criteria you enter.

Select one option then follow the applicable steps below:

### Select a Person

- Select this option to manually search for and identify duplicates, then click **Continue** to open the *Master Index Search* page.

The screenshot shows a web-based search form for a person. At the top right, there are two buttons: "Mug Shot Search - By Physical Description" and "Add Person". Below these is a tab labeled "Person". The form is organized into several sections:

- Personal Information:** LAST NAME (text input with "Clark" and a clear button), FIRST NAME (text input), MIDDLE NAME (text input).
- Identification:** TITLE (dropdown menu), DOB (text input with a calendar icon), AGE (text input with "To" and a text input).
- Demographics:** RACE (dropdown menu), SEX (dropdown menu), INDEX ID (text input).
- License Information:** DRIVERS LICENSE (text input), DRIVERS LICENSE STATE (dropdown menu), SSN (text input).
- Administrative:** NAME TYPE (dropdown menu), CREATOR (text input with a user icon).
- Date Range:** CREATION DATE FROM (text input with a calendar icon), CREATION DATE TO (text input with a calendar icon).
- Search Options:** PHONETIC (checkbox), SOUNDINDEX (checkbox), STATEWIDE SEARCH (checkbox with a funnel icon), SEARCH PREFERENCE (ALL, ANY buttons).
- Additional Search Criteria:** A dropdown menu labeled "ADDITIONAL SEARCH CRITERIA" with "- Select -".

At the bottom left is a button "Search External Systems". At the bottom right are three buttons: "Go Back", "Reset", and "Search".







- Enter your search criteria then click **Search** to display the *Person Search Results*, then select the *Master Person* you want to use as the *primary* record.

Refine Search New Search Add Person Online RMS Statewide Search

Person Search Results

Select one

3 / 3

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	 


Refine Search New Search

- c. The *Person Collapse* page opens with the selected Master Person record listed as the *Primary Person*. Click the **two-arrow** icon in the *Actions* column to select a different primary person record if necessary.

Go Back Exit

Person Collapse

Primary Person Details

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State Police	

Click to change primary person

Primary Filters

LAST NAME FIRST NAME MIDDLE NAME

Optional Filters

RACE SEX DOB SSN DL # CREATOR AGENCY

Search Matches

Duplicates To Be Collapsed

Add Duplicate Person

Any undesired records should be removed from this list before collapse.

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
No data available in table											


Showing 0 to 0 of 0 entries

Next

Hover your mouse over the **blue information bubble** to view detailed information about the Master Person record.

Person Collapse

Primary Person Details

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State	

Primary Person Details

LAST NAME	FIRST NAME	MIDDLE NAME	DOB	SEX	RACE
Clark	Ranelle	Marie	03/16/1959 (Age: 60)	Female	White
SSN	ADDRESS (RESIDENCE)		INDEX ID		
123-99-1234	6081 East 82nd Street #415 INDIANAPOLIS, IN 46250		1080		

- d. You can search for the duplicate Master Person record by selecting specific **Filters** that match with the primary person, or click the **Add Duplicate Person** link to manually search for a specific Master Person record using your own search criteria.

As a **Filter** example, select the **Last Name** and **First Name** filter buttons to search for other Master Person records that share the same last and first name as the Primary Person, then click **Search Matches** to display a list of potential duplicates. Buttons turn green when selected and those that have not been selected are gray.


**Primary Filters**

LAST NAME	FIRST NAME	MIDDLE NAME
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Optional Filters**

RACE	SEX	DOB	SSN	DL #	CREATOR AGENCY
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Search Matches](#)

- e. Click the select icon  in the *Actions* column to select the *New Primary Person Record*.

**Duplicates To Be Collapsed** [Add Duplicate Person](#)

Any undesired records should be removed from this list before collapse.

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
 1082	Clark	Ranelle		White		Female	03/16/2010		T12344AA10	Indiana State Police	  

### Specify Person Details to Search for Potential Duplicates

- a. Select this option to let the system search for potential duplicates based on the selected **Filters**, then click **Continue** to open the *Search Person Matches* page.

Go Back

**Primary Filters**

LAST NAME

FIRST NAME

MIDDLE NAME

☐

☐

☐

**Optional Filters**

RACE

SEX

DOB

☐

☐

☐

SSN

DL #

CREATOR AGENCY

☐

☐

☐

CREATOR DATE FROM

CREATOR DATE TO

Go Back

Search

**Potential Duplicate Groups**

Show 25 entries

Previous

Next

Showing 0 to 0 of 0 entries

Last Name	First Name	Middle Name	Race	Sex	DOB	SSN	DL #	Creator Agency	#Possible Matches	Actions
No data available in table										

Showing 0 to 0 of 0 entries

Previous

Next

- b. Select the **Filters** that apply to your search, then click **Search** to display a list of *Potential Duplicate Groups*.

For example, select **Last Name**, **First Name**, and **Sex** to search for all Master Person records that contain the same last name, first name, and sex.

[Go Back](#)

**Primary Filters**

LAST NAME ☒ FIRST NAME ☒ MIDDLE NAME ☐

**Optional Filters**

RACE ☐ SEX ☒ DOB ☐

SSN ☐ DL # ☐ CREATOR AGENCY ☐

CREATOR DATE FROM  CREATOR DATE TO







[Go Back](#)
[Search](#)

Select criteria then click Search to display matches


**Potential Duplicate Groups**

Show 25 entries Previous 1 2 3 Next

Showing 1 to 25 of 51 entries

Last Name	First Name	Middle Name	Race	Sex	DOB	SSN	DL #	Creator Agency	#Possible Matches	Actions
ALLEN	DONALD			M					2	
BECKER	CHRISTOPHER			M					2	
BECKER	CHRISTOPHER			U					3	
BEERTZER	HANK			M					4	
BUSCHEMY	STEVE			M					6	
CLARK	RANELLE			F					2	

Two records found →

- c. Click the select icon  in the *Actions* column to select the Group you want to collapse.
- d. The *Person Collapse* form appears displaying the two matching Master Person Index records under the *Duplicates To Be Collapsed* section.

Go Back Exit

**Person Collapse**

**Primary Person Details**

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
Please select a primary person from the list of duplicates below.											

**Primary Filters**

LAST NAME FIRST NAME MIDDLE NAME

☐ ☐ ☐

**Optional Filters**





RACE SEX DOB SSN DL # CREATOR AGENCY

☐ ☐ ☐ ☐ ☐ ☐

Search Matches


**Duplicates To Be Collapsed** Add Duplicate Person

Any undesired records should be removed from this list before collapse.

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State Police	 
1133	Clark	Ranelle		White		Female	03/16/2010		T12344AA10	Indiana State Police	 

Showing 1 to 2 of 2 entries

Next

- e. Optionally click the **Add Duplicate Person** link to search for and add another Master Person to the *Duplicates To Be Collapsed* list
  - f. Click the select icon  in the *Actions* column on the record you want to use as the Primary Person. Hover your mouse over the hand icon to display the Make Primary Person message.
- Note:** You must select one Primary Person to continue the collapse process.
- g. The selected duplicate record moves from the *Duplicate To Be Collapsed* section to the *Primary Person Details* section. This primary person record becomes the only Master Person Index record after the collapse process finishes.

Go Back Exit

**Person Collapse**

**Primary Person Details**

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State Police	

**Primary Filters**

LAST NAME FIRST NAME MIDDLE NAME

☐ ☐ ☐

**Optional Filters**

RACE SEX DOB SSN DL # CREATOR AGENCY

☐ ☐ ☐ ☐ ☐ ☐

Search Matches

**Duplicates To Be Collapsed** [Add Duplicate Person](#)

Any undesired records should be removed from this list before collapse.

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1133	Clark	Ranelle		White		Female	03/16/2010		T12344AA10	Indiana State Police	

Showing 1 to 1 of 1 entries

Next

- h. Click on the delete icon to remove records from the *Duplicates To Be Collapsed* list that should not be included in the collapse process, or click the not duplicate icon to flag the record as *Not Duplicate* and enter a comment as to why it is not considered a duplicate. Both methods remove the record from the *Duplicates To Be Collapsed* list.
3. Click **Next** to run the collapse process. For more information about running the collapse process refer to "Run Collapse Process" below for instructions on collapsing Primary and Duplicate Master Index Records into one Master Record.

**Note:** Before running the collapse process, double check the *Duplicates To Be Collapsed* list to ensure the only records that appear are those you want to collapse with the *Primary Person* record

## Run Collapse Process

Use the following procedure to collapse Primary and Duplicate Master Index records into one Master Record. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization using different criteria.



1. Select the Primary and Duplicate Master Person Index records to collapse. (For more information on accessing the collapse process and searching for duplicates see "Access Collapse Process" on page 297 and "Search for Duplicate Master Indices" on page 299, respectively.)

**Person Collapse**

**Primary Person Details**

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State Police	[Edit] [Delete]

**Primary Filters**

LAST NAME: ☒ FIRST NAME: ☒ MIDDLE NAME: ☐

**Optional Filters**

RACE: ☐ SEX: ☐ DOB: ☐ SSN: ☐ DL #: ☐ CREATOR AGENCY: ☐

[Search Matches]

**Duplicates To Be Collapsed**

Any undesired records should be removed from this list before collapse.

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1082	Clark	Ranelle		White		Female	03/16/2010		T12344AA10	Indiana State Police	[Edit] [Delete] [Add]

Showing 1 to 1 of 1 entries

[Next]

**Note:** You must select one Primary Person and at least one Duplicate to run the collapse process.

2. Double check the *Duplicates To Be Collapsed* list to ensure the only records that appear are those you want to collapse with the *Primary Person* record; remove any that should not be included.
3. Click **Next**
4. A warning message appears when the duplicate record is associated with other records in the system such as, incidents, arrests, etc. Hover the mouse over the **red triangle** for a summary of the associations.

In the example below, the duplicate person is associated with one incident.

Person Collapse

Go Back Exit

**Primary Person Details**

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State Police	

**Warning:** Names that have a warning icon next to them, are directly associated to system records. If you do not choose to keep these names, the names will be replaced by the primary person's name. The changes to these system records can NOT be undone by un-collapsing.

Select the Aliases you want to transfer to the primary person.

**Aliases**

	Last Name	First Name	Middle Name	Title	DOB	SSN	Date Of Info
<input type="checkbox"/>	Association Count				03/16/2010		03/16/2018

Association Count  
Incidents: 1  
Click to view Entire Entry

Collapse

5. Select the box to the left of the person you want to transfer to the primary person.



6. Click the **Collapse** button to continue with the collapse process, click **Exit** to abort without collapsing, or click **Go Back** to return to the *Person Collapse* screen.

By choosing **Collapse**, the name on the associated records becomes the primary person name.

7. A warning and comment box appears. Enter a **Comment** and click **Save** to continue the collapse process, or click **Cancel** to abort without collapsing.

Collapse People

**Warning: All Duplicates selected will be collapsed into the selected primary Person.**

**COMMENTS**

Cancel Save

8. The *Person Collapse* screen appears when the Collapse process is complete.

Perform Another Task Exit

Person Collapse

**Primary Person Details**
Edit Person

<b>LAST NAME</b> Clark	<b>FIRST NAME</b> Ranelle	<b>MIDDLE NAME</b> Marie	<b>DOB</b> 03/16/1959 (Age: 59)	<b>SEX</b> Female	<b>RACE</b> White
<b>DRIVER'S LICENSE #</b> T12344AA10	<b>DRIVER'S LICENSE STATE</b> Indiana	<b>SSN</b> 123-99-1234	<b>ALIASES</b> Ranelle Clark(Alias)		
<b>ADDRESS (RESIDENCE)</b> 6081 East 82nd Street #415 INDIANAPOLIS, IN 46250			<b>INDEX ID</b> 1080		

Click **Perform Another Task** to Collapse other records, click the **Edit Person** link to edit the person details, or click **Exit**.

- Data is collected and logged during the collapse process for auditing and tracking purposes. The *Collapse Log* also provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

For more information about the *Collapse Log* or the *UnCollapse* process, refer to "Collapse Log" below.

## Collapse Log

Basic Master Index data is collected and logged during the collapse process for auditing and tracking purposes. The *Collapse Log* also provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

The Collapse Date, Collapsed By, Master Index Name and other information depending on the Master Index are tracked in the *Collapse Log*. For example, for the Master Person Index, Race, Sex, DOB, SSN, and Driver's License Number of both the Primary and Duplicate Person records are logged.

Use the following procedure to access the *Collapse Log*. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization.

- Access the **Collapse** process through the *Records Management* menu, then select *Person Records* for Master Person. For more information on accessing the **Collapse** process refer to "Access Collapse Process" on page 297.

- Click the **Collapse Log** button to open the *Person Collapse Log*.

**People Collapse** Collapse Log

SELECT A CRITERIA TO PROCESS COLLAPSE

☒ Select a Person  
☐ Specify Person Details to search for potential duplicates

Go Back Continue

Go Back

SEARCH SEARCH BY

Enter search text Search By

Reset Search

Collapse Date/Time	Collapse By	Index ID	Person Summary	Actions
2019-03-04 12:30:53.0	CSAUR	1080	CLARK RANELLE MARIE <b>RACE:</b> White <b>DOB:</b> 1959-03-16 00:00:00.0 <b>SSN:</b> 123991234 <b>DL #:</b> T12344AA10	
2018-03-07 11:55:36.0	STATE_OFFICER11	1070	HARRIS AVERY MARIE <b>RACE:</b> White <b>DL #:</b> 12345	
2018-02-26 16:07:51.0	STATE_OFFICER11	740	BRANSON ROBERT <b>RACE:</b> White <b>DOB:</b> 1972-10-24 00:00:00.0 <b>SSN:</b> 123456789 <b>DL #:</b> CO111111	
2017-08-24 11:15:24.0	STATE_OFFICER11	932	WHITE SAM PERSON01 <b>RACE:</b> Asian <b>DOB:</b> 1980-06-01 00:00:00.0	
2017-06-29 12:59:03.0	STATE_OFFICER11	908	BROWN CHARLIE SNOOPS <b>RACE:</b> White	
2017-06-06 13:34:23.0	STATE_OFFICER11	910	ZEDILLO REALLY REALLY REALLY LONG LAST NAME ERNESTO EXTREMELY MUCHO LONG FIRST NAME LONG MIDDLE NAME <b>RACE:</b> Native Hawaiian or Other Pacific Islander <b>DOB:</b> 1980-10-10 00:00:00.0 <b>SSN:</b> 222444556 <b>DL #:</b> MX1234568	
2016-10-31 13:11:03.0	TSTC	719	KID BILL TEH <b>RACE:</b> White	

- Optionally click the **Index ID** link to open the *View Person* screen.


Collapse Date/Time	Collapse By	Index ID	Person Summary	Actions
2019-03-04 12:30:53.0	CSAUR	1080	CLARK RANELLE MARIE <b>RACE:</b> White <b>DOB:</b> 1959-03-16 00:00:00.0 <b>SSN:</b> 123991234 <b>DL #:</b> T12344AA10	


For instructions on using the *View Person* screen refer to the *Caliber Online RMS User Guide*.

Click the **Go Back** button to return to the *Person Collapse Log*.

- Optionally search for specific records.

Enter your search criteria in the **Search** text box and select the type of data you want to **Search By**, then click the **Search** button.

- Optionally click the **Select** icon  in the *Actions* column to open the *Person Collapse* screen to view the details of the collapsed data.

Collapse Date/Time	Collapse By	Index ID	Person Summary	Actions
2019-03-04 12:30:53.0	CSAUR	1080	CLARK RANELLE MARIE <b>RACE</b> White <b>DOB</b> :1959-03-16 00:00:00.0 <b>SSN</b> :123991234 <b>DL</b> #T12344AA10	

Go Back

**Primary Person Details**

Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
Clark	Ranelle	Marie	W	F	03/16/1959	123-99-1234	

**Collapsed Records**

<input type="checkbox"/>	Index ID	Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
<input type="checkbox"/>	1082	Clark	Ranelle		W	F	03/16/2010		T12344AA10

**COMMENTS**

Go Back UnCollapse

**Note:** The **UnCollapse** button provides a way to reverse the results of the collapse process. For instructions on using the UnCollapse button refer to "UnCollapse Master Index" below.


- Click **Go Back** to return to the *Person Collapse Log*.

## UnCollapse Master Index

The *Collapse Log* provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

Use the following procedure to uncollapse a Master Index record. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization.

- Access the **Collapse Log** through the *Records Management* menu, then select *Person Records* for Master Person. For more information on accessing the **Collapse Log** refer to "Collapse Log" on page 309.
- Identify the collapsed record you want to uncollapse, then click on the **View** icon in the *Actions* column to open the *Person Collapse* screen.

Collapse Date/Time	Collapse By	Index ID	Person Summary	Actions
2019-03-04 12:30:53.0	CSAUR	1080	CLARK RANELLE MARIE <b>RACE</b> White <b>DOB</b> :1959-03-16 00:00:00.0 <b>SSN</b> :123991234 <b>DL</b> #T12344AA10	

Go Back

**Primary Person Details**

Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
Clark	Ranelle	Marie	W	F	03/16/1959	123-99-1234	

**Collapsed Records**

<input type="checkbox"/>	Index ID	Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
<input type="checkbox"/>	1082	Clark	Ranelle		W	F	03/16/2010		T12344AA10

**COMMENTS**

Go Back UnCollapse

3. Select the **Collapsed Records** you want to uncollapse from the Primary Person and enter any **Comments**.

Go Back

**Primary Person Details**

Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
Clark	Ranelle	Marie	W	F	03/16/1959	123-99-1234	

**Collapsed Records**

<input type="checkbox"/>	Index ID	Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
<input checked="" type="checkbox"/>	1082	Clark	Ranelle		W	F	03/16/2010		T12344AA10

**COMMENTS**

Collapsed in error.

Go Back UnCollapse

4. Click the **UnCollapse** button to process your request.

Several events occurred as a result of the uncollapse process:

- The primary and duplicate persons are once again separate Master Person records.
- The name on all associated records (i.e., incidents, arrests, etc.) are back to the original pre-collapse state.
- The *Person Collapse Log* entry has been removed.

Go Back

**SEARCH**

clark

**SEARCH BY**

Last Name

Reset Search

No Collapse Logs Found



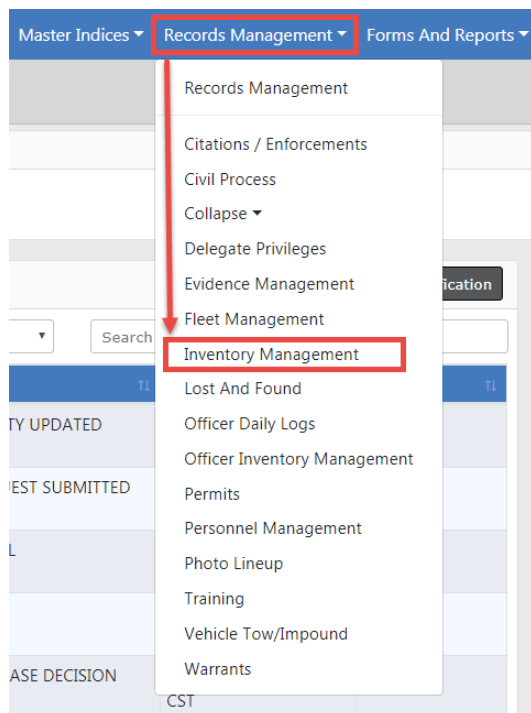


# Chapter 18. Inventory Administration

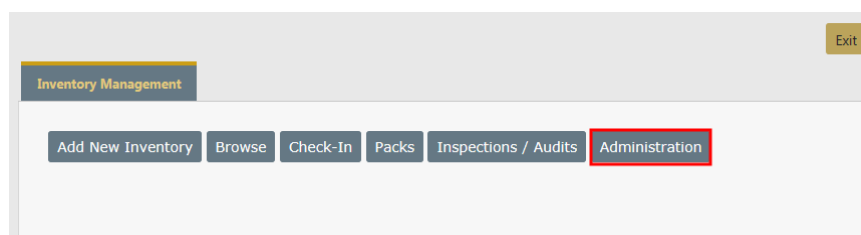
**Inventory Administration** allows users with proper permissions to configure and maintain settings for office supplies, fixed assets, weapons, equipment, vendor list, locations with assigned managers, clothing, and others.

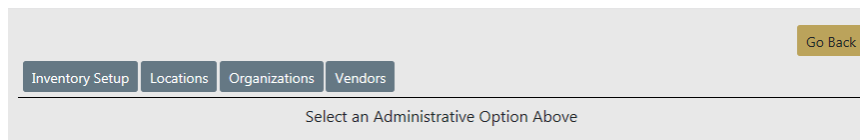
## Access Inventory Administration

Click on the **Records Management** label then click on **Inventory Management**.



Click the **Administration** button to open the **Inventory Administration** page containing up to four tabs depending on your agency setup.

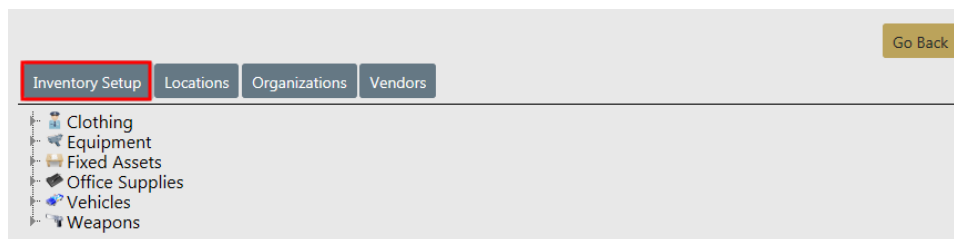




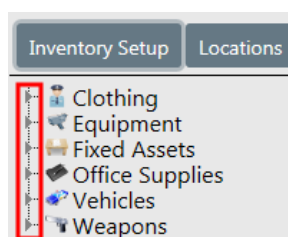
- Inventory Setup
- Locations
- Organizations
- Vendors

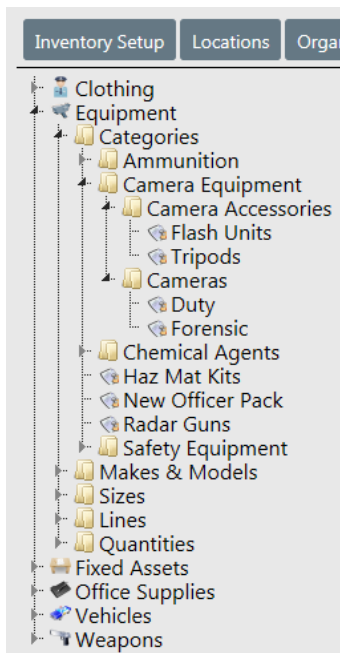
## Inventory Setup

The *Inventory Setup* tab of the **Inventory Administration** page contains configuration settings of clothing, equipment, fixed assets, office supplies, vehicles, and weapons.



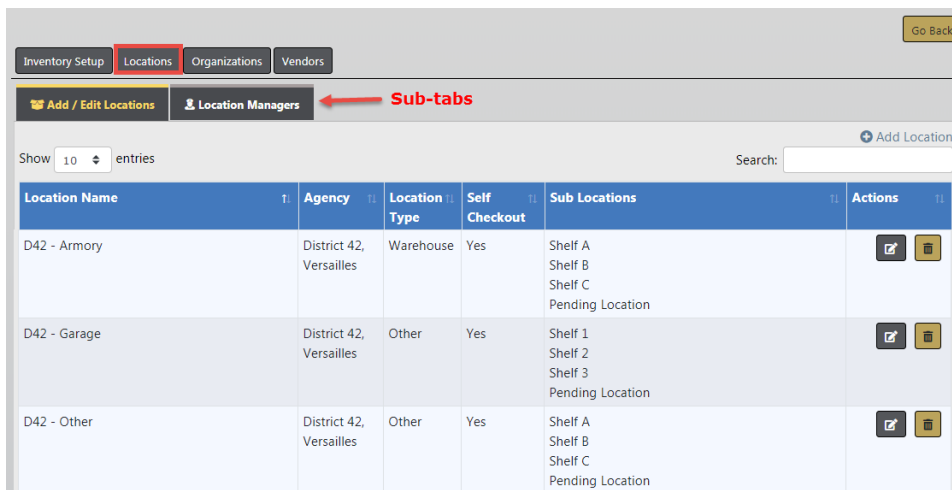
To the left of each category is a sideways **funnel**. Click on the **funnel** to drill-down for sub-categories, and sub-categories may also have funnels. You can keep drilling-down until no more funnels appear.





## Locations

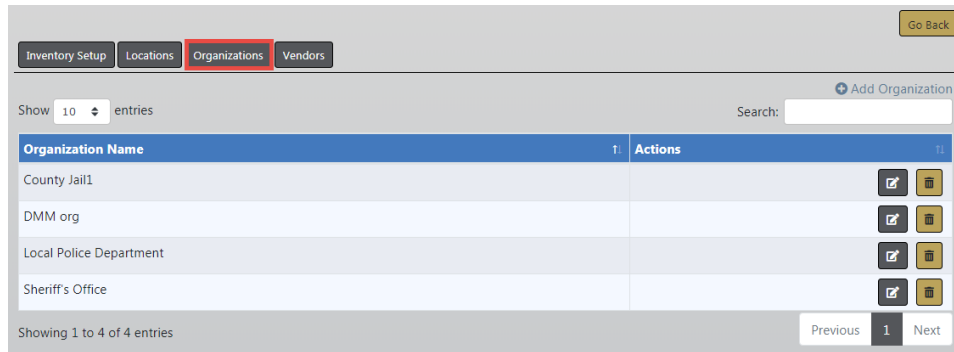
The *Locations* tab of the **Inventory Administration** page contains configuration settings for various types of locations such as a warehouse, closets, rooms, parking lots, and managers assigned to the locations.



There are two sub-tabs, *Add/Edit Locations* and *Location Managers*. Locations are configured and managed through the *Add/Edit Locations* tab and managers are assigned to locations through the *Location Managers* tab.

## Organizations

The *Organizations* tab of the **Inventory Administration** page contains organization configuration settings, particularly useful for multi-agency users.

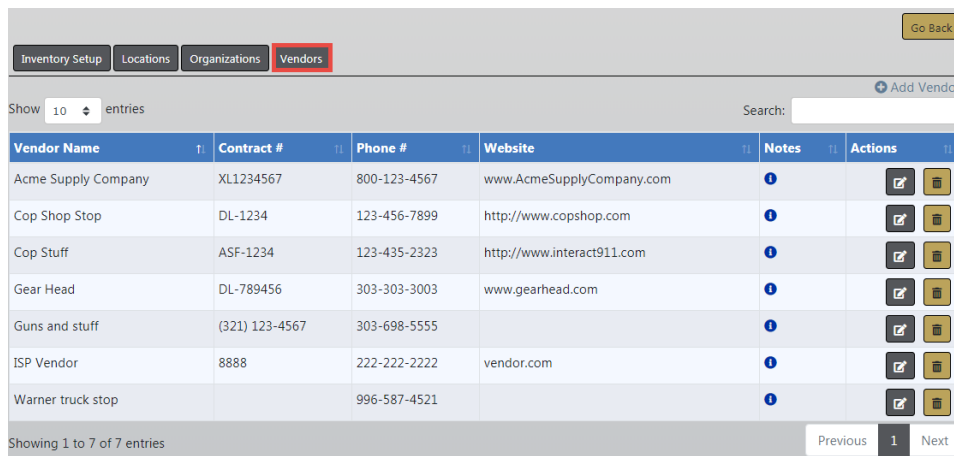


Organization Name	Actions
County Jail1	
DMM org	
Local Police Department	
Sheriff's Office	

Showing 1 to 4 of 4 entries

## Vendors

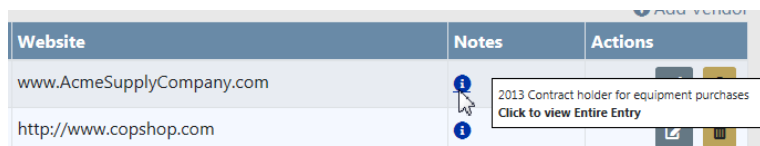
The *Vendors* tab of the **Inventory Administration** page contains vendor configuration settings.



Vendor Name	Contract #	Phone #	Website	Notes	Actions
Acme Supply Company	XL1234567	800-123-4567	www.AcmeSupplyCompany.com		
Cop Shop Stop	DL-1234	123-456-7899	http://www.copshop.com		
Cop Stuff	ASF-1234	123-435-2323	http://www.interact911.com		
Gear Head	DL-789456	303-303-3003	www.gearhead.com		
Guns and stuff	(321) 123-4567	303-698-5555			
ISP Vendor	8888	222-222-2222	vendor.com		
Warner truck stop		996-587-4521			

Showing 1 to 7 of 7 entries

Hover your mouse over the blue information bubble to view a portion of a note entry that is associated with the vendor record, or click the blue information bubble to view the entire note entry.



Website	Notes	Actions
www.AcmeSupplyCompany.com	2013 Contract holder for equipment purchases Click to view Entire Entry	
http://www.copshop.com		

# Chapter 19. Reports

Online RMS reports consist of five report types: Ad Hoc, Custom Field, Custom Form, and Standard Menu.

- Ad-Hoc reports are created via Jasper Reports or iReports. Once a user with the appropriate permissions has created and saved ad hoc reports, other users within the agency/schema who have been the appropriate roles/permissions, can then use them.

**Note:** iReport allows for a detailed and specific set of design options. A user who wants to alter the form beyond the capabilities of the Custom Form Designer would do so in iReport. They can download the template, make the changes in iReport, then re-upload it here. This will require the user to know how to use iReport.

- Custom field reports are built from user-defined fields that have custom labels.
- Custom forms reports are based on an agency's needs and are designed to gather specific information to meet those needs.
- Standard menu reports are those that are delivered with the system. They are basic, out-of-the-box reports for statistics and such.

For information on how basic users access and use the various RMS reports, refer to the *Caliber Online RMS*.

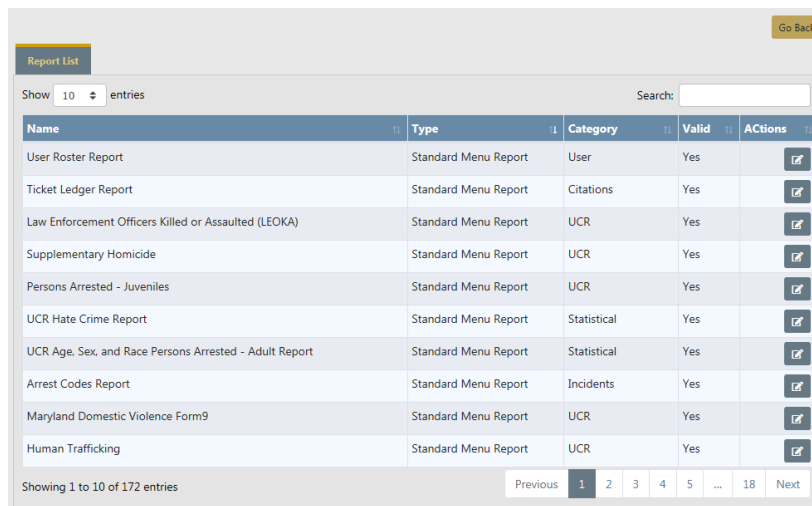
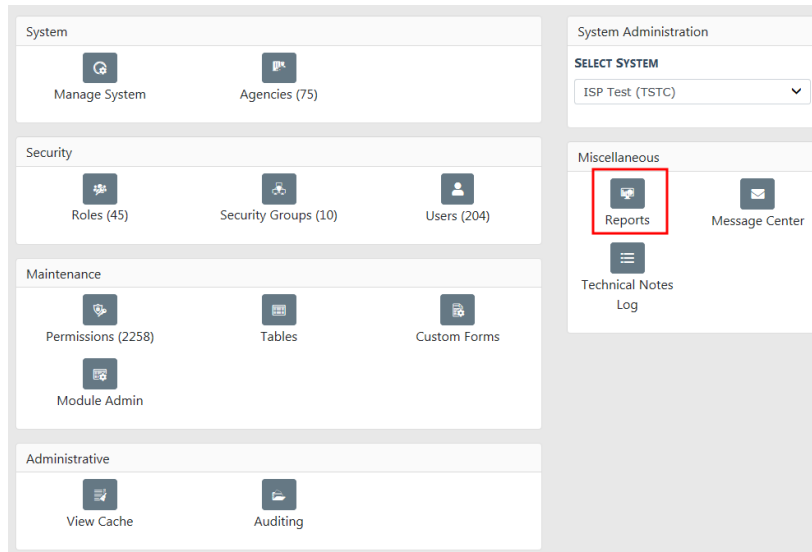
## Report Administration

The *Report Administration* page provides administrators ways to manage the various reports.

**Note:** For information on how basic users access and use the various RMS reports, refer to the *Caliber Online RMS User Guide*. The **Forms And Reports** menu provides access to existing reports.

You can access, add, and update reports from the *Report Administration* page.

From the *Home* page, click the **Administration** menu label to open the *Administration Home* page, then click on the **Reports** icon to display the *Report Administration* page. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.



This page displays both custom created reports and product reports.

To edit a product report, click the edit icon to display an *Edit Report* page. Here, you can change the report name, category, description, agencies if applicable, and roles. In addition, Operations can control who has access to which reports.

## Ad Hoc Reports

As the name implies, an ad hoc report is one created for a specific purpose. Online RMS agencies can create reports that perform specific functions within their agencies. To create ad hoc reports, a user (sometimes referred to as a *superuser*) must have the appropriate permissions and have access to the Jasper Server.

## Ad Hoc Tool Access

For a user to access the Open Ad Hoc Tool, an agency administrator must set up that user with the appropriate access permissions.

Use the following procedure to set up ad hoc tool access.

1. From the *Home* page, open the **Administration** menu then click on **Users** to open the *Manage Users* page. The page opens to the *User Accounts* tab by default. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.
2. Use the **Search** fields to locate the user by typing a search parameter in the **Search** field, in the **Status** field select *Active*, then click the **Search** button to display a list of users that match your criteria.

The screenshot shows the 'User Accounts' management page. At the top, there are 'Go Back' and 'Add User' buttons. Below them is a navigation bar with 'User Accounts' (highlighted with a red box) and 'Log' buttons. The search section includes a 'Search' field with 'hicks' (highlighted with a red box), a 'Status' dropdown set to 'Active' (highlighted with a red box), a 'Subscription Level' dropdown set to '-All-', and 'Reset' and 'Search' buttons. Below the search section is a table with columns: First, Middle, Last, User Name, Status, Subscription Level, Agency, SA, User Role, and Actions. The table contains one entry for Aaron Hicks. The 'Actions' column for this entry contains four icons: a pencil (edit), a plus sign (add), a trash can (delete), and a person icon (profile). The profile icon is highlighted with a red box and a red arrow. At the bottom of the table, it says 'Showing 1 to 1 of 1 entries'. There are 'Previous', '1', and 'Next' pagination buttons. A 'Go Back' button is at the bottom center.

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

Showing 1 to 1 of 1 entries

Previous 1 Next

Go Back

3. Click in the **Actions** column in the same row as the user's name to open the user's profile page as shown.

**Contact Information**

USER ID: ODL\_USER LAST LOGIN DATE: 03/02/2019 04:43:38 PM CST

FIRST NAME: Aaron MIDDLE NAME: LAST NAME: Hicks

JURISDICTION: ISP Test (TSTC) TELEPHONE: EMAIL: test@test.com

SUBSCRIPTION LEVEL: Full Time ENABLE EMAIL: ☒ STATUS: Active

**Jurisdiction Information**

County	Agency	Date Created	Date Disabled	Default	Disabled
ISP Test (TSTC)	District 42, Versailles	03/06/2017		<input checked="" type="radio"/>	<input type="checkbox"/>

- Click the **Security Settings** tab.

**Change Password**

NEW PASSWORD: LAST PASSWORD CHANGE DATE: 12/14/2018 05:49:20 PM CST

CONFIRM PASSWORD: Change Password Reset Via Email

**Security Questions**

QUESTION	ANSWER
Color of your First Car	Test
In what Town was your First Job	Test
Name of the City you Were Born	Test

**Roles, Levels & Security Groups**

INCIDENT SECURITY LEVEL: Animal Control INDEX SECURITY: Level 2 - Conditional Access to Data

ROLES: ☒ OFFICER\_SUPERVISOR ☒ OFFICER

SECURITY GROUPS: Click To Select

- Click into the **Roles** field and select **AGENCY\_AD\_HOC\_REPORTING\_TOOL** from the list.

**Roles, Levels & Security Groups**

INCIDENT SECURITY LEVEL: Animal Control INDEX SECURITY: Level 2 - Conditional Access to Data

ROLES: ☒ OFFICER\_SUPERVISOR ☒ OFFICER ☒ AGENCY\_AD\_HOC\_REPORTING\_TOOL

- Click **Save** to save the change.

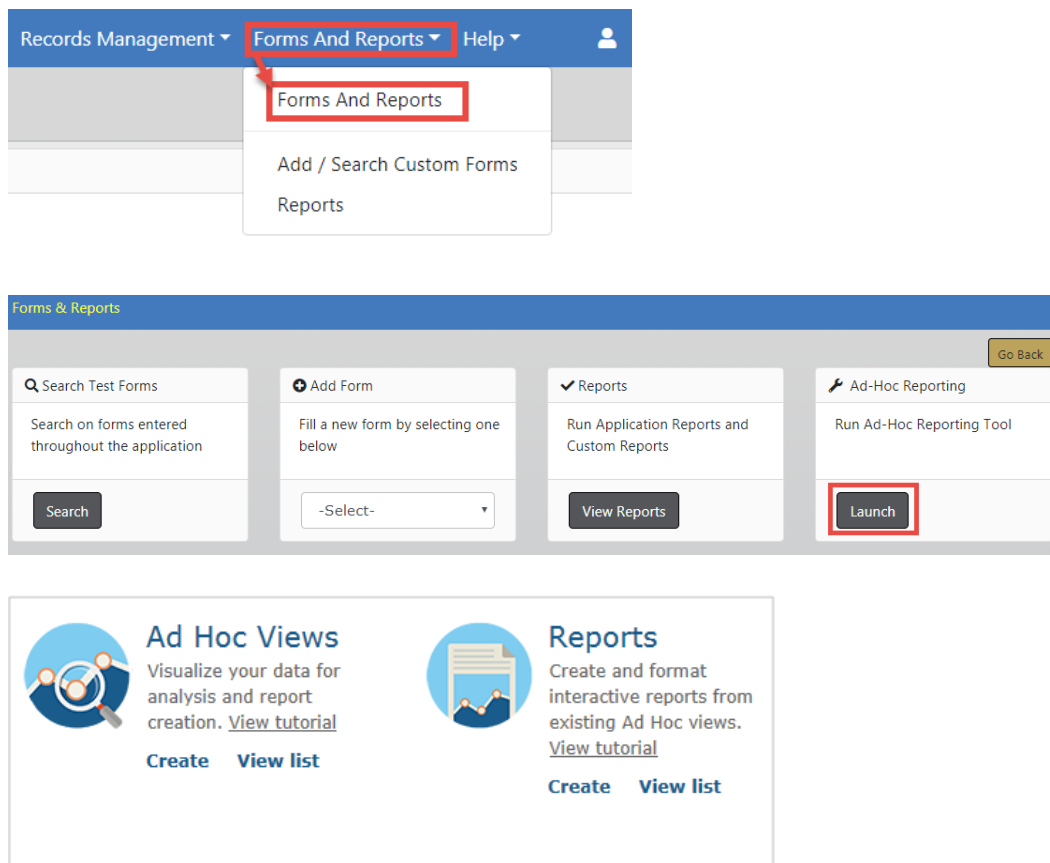


## Ad-Hoc Reporting

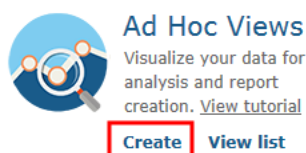
Reporting Area has been added to ad-hoc report topics to allow users to create Ad-Hoc reports then group them by reporting areas.

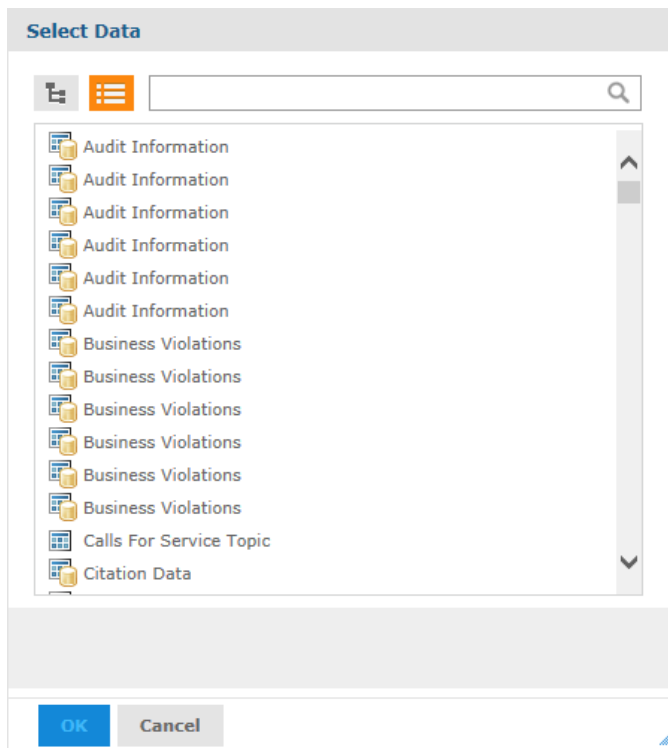
Use the following procedure to select an ad-hoc topic that contains the **Reporting Area** field.

1. From the *Forms and Reports* page, click the **Launch** button under the Ad-Hoc Reporting section to open the following page.

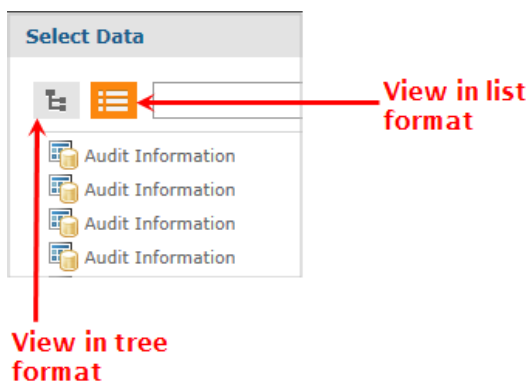


2. Click **Create** under Ad Hoc Views to open the *Select Data* window.





Click on the appropriate icon to view the source in *Tree* format or in *List* format, respectively. The *List* format is selected by default.



3. To choose using the *Tree* format:
  - a. Click **+** to the left of the **Public** folder to open the folder.
  - b. Click **+** to the left of **Ad Hoc Components**.
  - c. Click **+** to the left of **Topics**.
  - d. Select a topic.

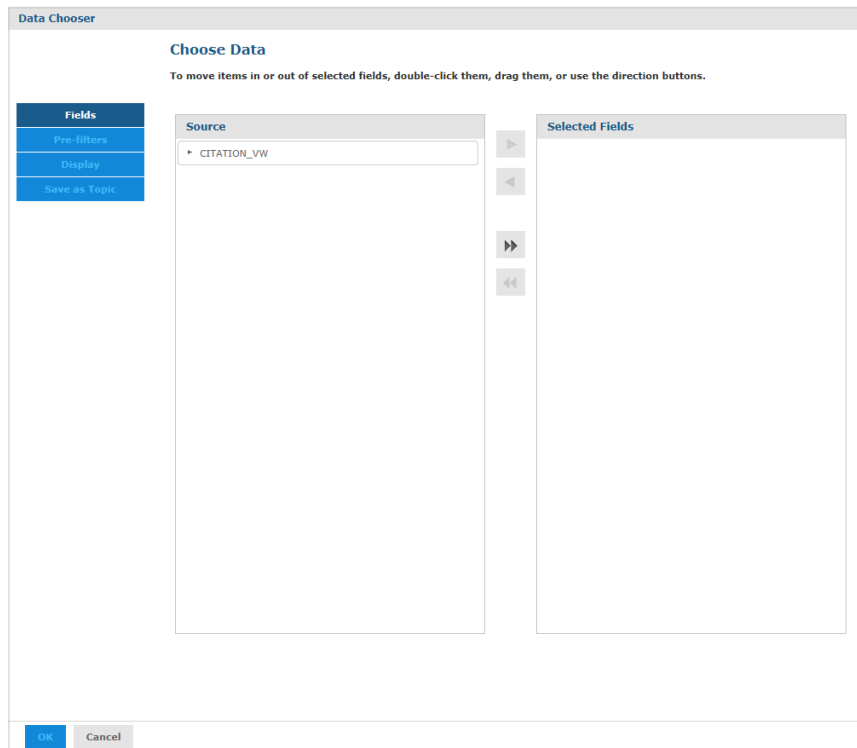
**Note:** The following topics have been modified as follows:

- Calls for Service Topic has been modified as follows:

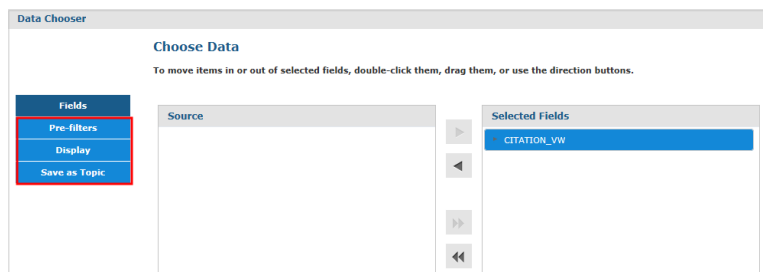
BEAT and SUB\_BEAT is labeled Reporting Area.

Officer Information is labeled Primary Officer.

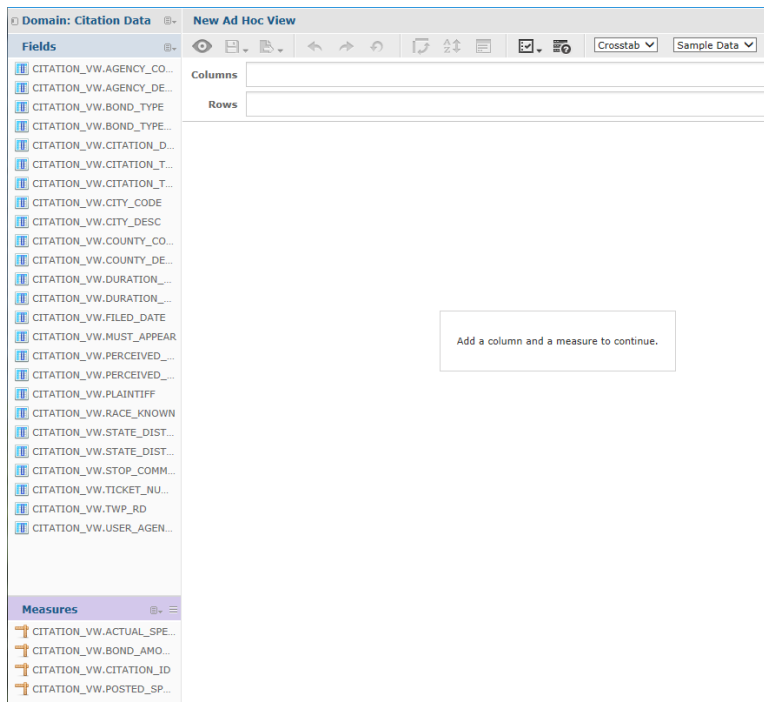
- Evidence Topic has the additional fields: Property Summary, Location Remarks, Reporting Area, and Status description.
  - Field Arrest Charges Topic has the additional fields: Person Summary, Address Summary, Impound ID, Vehicle Seized, Vehicle Stored, Currency Seized, Currency Total, Discharge Date, Status Code, Status (to reference new columns), Case Number, Reporting Area, Longitude, and Latitude.
  - Field Arrest Topic has the same additional fields as the Field Arrest Charges Topic (see above).
  - Field Contact Topic has the additional fields: Notes, Address, Location Reporting Area and general summary information for Officer, Gang, Person, Organization and Vehicle.
  - Incident Topic has the additional fields: Status (description), Address (summary), Reporting Area, Incident NIBR City, Incident County, Incident Township.
  - Incident Offender Evidence Topic has the additional fields: Property Summary, Status (description), Address (summary), Location Remarks, Reporting Area, Location Agency, Incident NIBR City, Incident County, Incident Township.
4. To choose using the *List* format:
- a. Scroll down and click on the source you want, then click the **Choose Data...** button to open the *Data Chooser* page.



- b. Click on items under the *Source* section then click the **right arrow** to move them into the *Selected Fields* section. Or **double-click** on selected *Source* items to move them automatically into the *Selected Fields* section.
- c. The **Pre-Filters**, **Display**, and **Save as Topic** buttons on the left become active. Click through each button to define the report.



- **Pre-Filters:** Create filters to limit the data available in the editor. For example, you can limit the report to list citations with a specific citation type.
  - **Display:** Change the display name for fields, re-order fields, and choose whether the fields are listed in groups or not.
  - **Save as Topic:** Save the topic for later use.
5. Click **OK** to open the *New Ad Hoc View* page.



6. Click on titles on the left and drag and drop them into the Columns and Rows fields on the upper right.
7. Give your report a title in the designated text box.
8. Use the tool bar to apply other functions. Hover your mouse over each icon on the tool bar for a description of its function.

For more information on Ad Hoc Views, click on the [View Tutorial](#) link.



### Ad Hoc Views

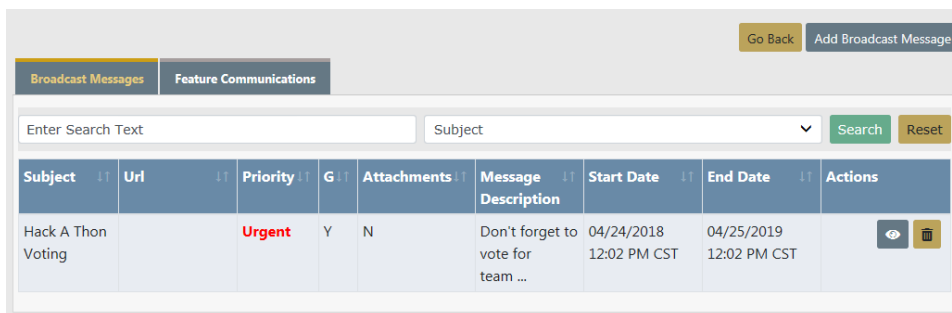
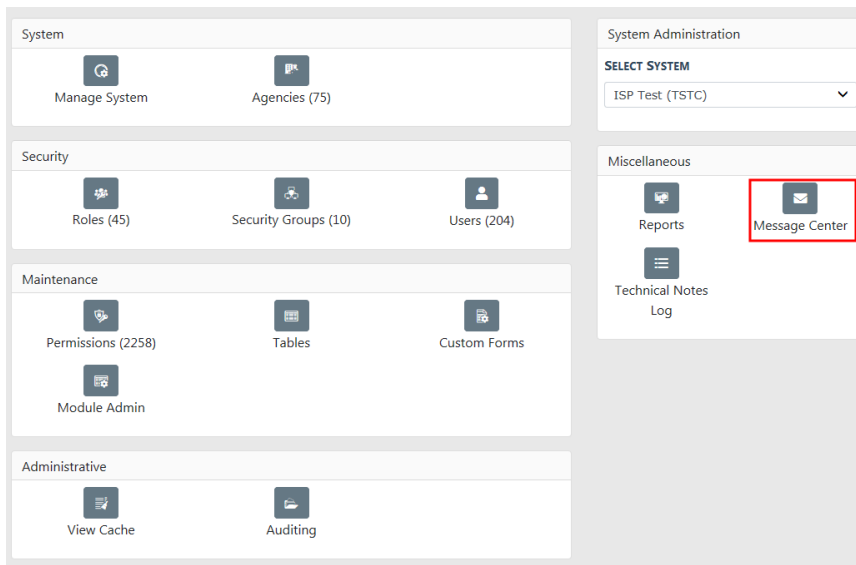
Visualize your data for analysis and report creation. [View tutorial](#)

[Create](#) [View list](#)



## Chapter 20. Message Center

This module allows administrators to setup and maintain broadcast messages for users. From the *Administration Home* page, click the **Message Center** icon to open the *Message Center* page as shown. (Alternatively, select **Broadcast Messages** from the **Administration** drop down menu on the top navigation bar.)



This page has two tabs: **Broadcast Messages** and **Feature Communication**. Depending upon roles, some users see only the **Broadcast Messages** tab; others see both.

- "Broadcast Messages" on the next page for more information and instructions on the first tab.
- "Feature Communications" on page 336 for information and instructions on the second tab.

## Broadcast Messages

The **Broadcast Messages** tab is used to manage administrative messages to users. These messages relay information concerning mandatory meeting or firearms qualification notices as well as time sensitive information such as an Attempt to Locate notice for a stolen vehicle or reckless driver. Administrators set up these messages to be displayed to recipients according to their agency affiliation and/or role designation. Each message includes a start and end date/time. Administrators can select from various message types (informational, web sites, Amber Alerts, warnings, training tips, and so forth) and set a specific priority level for each message.

Use the **Search** fields to search for a specific message as follows:

1. Type a string of characters in the first **Search** text field.
2. Select from the drop-down list in the subject field to specify where the string can be found.
3. Click **Search** to return search results.

## Add Message

Use the following procedure to set up and post a broadcast message.

1. From the **Broadcast Messages** tab on the *Message Center* page, click the **Add Broadcast Message** button in the upper right corner to open the *Add Broadcast Message* page.



Broadcast Messages / Add Broadcast Message

Go Back Save

**Message Details**

**SUBJECT**  **URL**

**MESSAGE**

**MESSAGE TYPE**  **PRIORITY**

**LOGIN NOTIFICATION** ☐

**AGENCY RECIPIENTS** Select All Remove All

**ROLE RECIPIENTS** Select All Remove All

**START DATE / TIME**  **END DATE / TIME**

Go Back Save

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

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

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

**GLOBAL** ☒ **LOGIN NOTIFICATION** ☐

**SCHEMAS** 🔍

✖ ISP Test (TSTC) ✖ Texas County, TX (TSTB) |

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

The screenshot shows the 'Edit Message' interface in the Online RMS system. 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 a message about Online RMS maintenance. The editor includes a toolbar with various formatting options like bold, italic, underline, and text color. The message text reads: '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.'

- a. When you select the **Login Notification** checkbox, a text editor opens, where you can enter a message and format the content.
  - b. Select the **Require Acknowledgment** checkbox if you want to require users to acknowledge the message. If this option is checked, the message appears every time a user logs in, until the user acknowledges the message.
6. Select one or more **Agency Recipients** for your message by selecting from a list.

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

7. Select one or more **Role Recipients**.
8. Edit the **Start Date** and **Time** if needed (default setting is current date and time) and set an **End Date** and **Time**.

The message automatically expires on the specified end date and time, unless you delete it before that time, or you edit the message and extend the date and time.

9. Click **Save** to save the message. The *Edit Message* page opens with two tabs: *Message Details* and *Attachments*.

Broadcast Messages / Edit Broadcast Message

Go Back Save

**Message Details** Attachments

**SUBJECT** **URL**

Scheduled Maintenance

**MESSAGE**

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

**MESSAGE TYPE** **PRIORITY**

Informational Low

**GLOBAL** **LOGIN NOTIFICATION** **REQUIRE ACKNOWLEDGMENT**

☐ ☒ ☒

Images 0/15

**AGENCY RECIPIENTS** Select All Remove All

✖ District 42, Versailles

**ROLE RECIPIENTS** Select All Remove All

✖ CID\_SUPERVISOR

**START DATE / TIME** **END DATE / TIME**

06/15/2020 0957 06/15/2020 1130

Go Back Save

10. Click **Save**.

11. Optionally click on the **Attachments** tab to upload an image file. Click **Add Attachment** to select a file and upload.

**Note:** The **Attachments** tab displays after you click **Save** when adding a new attachment.

Go Back Save

**Message Details** **Attachments**

Add Attachment




For more information on uploading attachments, refer to "Attachments" on page 11.


12. Repeat Steps to broadcast another message or click **Go Back** to return to the *Message Center* page.

## View Message

Use the following procedure to view a broadcast message.

1. Access the *Message Center* page. For more information, refer to "Message Center" on page 329.
2. Use the **Search** feature to display a specific message.
  - a. Type a string of characters in the first **Search** text field.
  - b. Select from the drop-down list in the subject field to specify where the string can be found.
  - c. Click **Search** to return search results.

Subject	Url	Priority	G	Attachments	Message Description	Start Date	End Date	Actions
Reminder		Low	N	N	This is a reminder to turn in ...	03/04/2019 03:48 PM CST	03/05/2019 03:48 PM CST	  

3. Click  to the far right in the same row as the listing of the message to open a window similar to the one shown.

Broadcast Messages / View Broadcast Message Go Back

Message Details

SUBJECT

Test Broadcast Message

URL

MESSAGE

A broadcast message demonstration.

MESSAGE TYPE

Informational

PRIORITY

Low

GLOBAL

☐

AGENCY RECIPIENTS

Ang Police Department

ROLE RECIPIENTS

CID\_SUPERVISOR

START DATE / TIME

12/12/2019 1312

END DATE / TIME


12/13/2019 1312

Go Back

4. Click **Go Back** to return to the *Message Center* page.

## Edit Message

Use the following procedure edit a broadcast message.

1. From the *Message Center* page, click  to the far left in the row listing the message you want to edit to open the *Edit Message* page. For more information on accessing the *Message Center*, refer to "Message Center" on page 329.

Broadcast Messages / Edit Broadcast Message

Go Back Save

Message Details Attachments

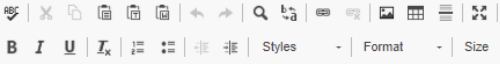
**SUBJECT**  **URL**

**MESSAGE**

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

**MESSAGE TYPE**  **PRIORITY**

**GLOBAL** ☐ **LOGIN NOTIFICATION** ☒ **REQUIRE ACKNOWLEDGMENT** ☒



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.

Images 0/15

**AGENCY RECIPIENTS** Select All Remove All

**ROLE RECIPIENTS** Select All Remove All

**START DATE / TIME**  **END DATE / TIME**

Go Back Save


2. Make changes or upload attachments as needed. ("Add Message" on page 330 for more information.)

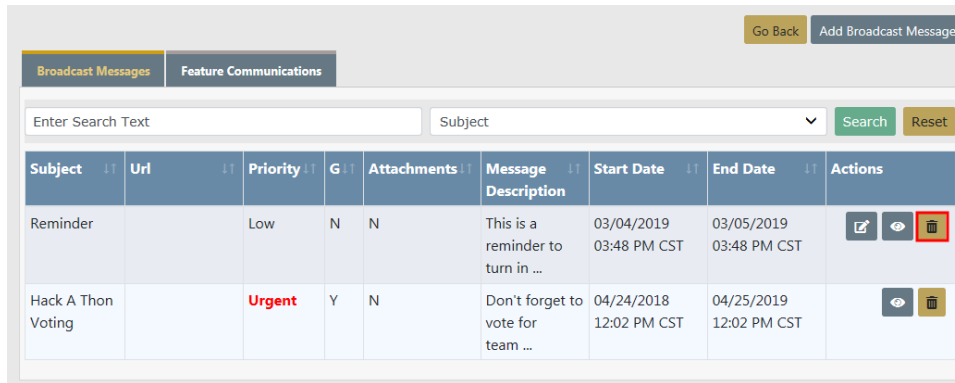
**Note:** To cancel changes, click **Go Back** at any time to return to the *Message Center* page.






3. Click **Save** to save changes and return to the *Message Center* page.

## Delete Message

Use the following procedure to delete a broadcast message.

1. On the **Broadcast Messages** tab of the *Message Center* page, locate the message you want to delete. For more information on access the Message Center, refer to "Message Center" on page 329.
2. Click  to the far right in the same row to delete the message.

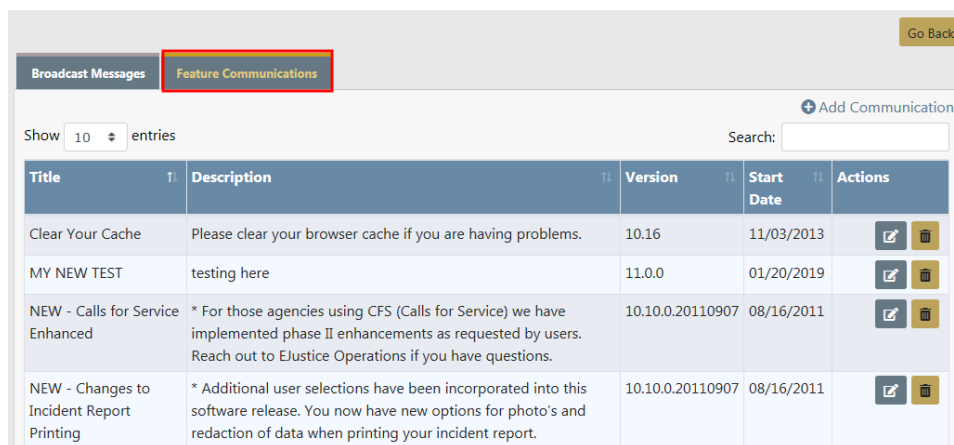










Subject	Url	Priority	G	Attachments	Message Description	Start Date	End Date	Actions
Reminder		Low	N	N	This is a reminder to turn in ...	03/04/2019 03:48 PM CST	03/05/2019 03:48 PM CST	  
Hack A Thon Voting		<b>Urgent</b>	Y	N	Don't forget to vote for team ...	04/24/2018 12:02 PM CST	04/25/2019 12:02 PM CST	 

3. A *Are you sure you want to delete this message?* dialog box appears.
4. Select **OK** to delete or **Cancel** to return to messages without deleting.


## Feature Communications

From the *Message Center* page, click the **Features Communications** tab to open the *Feature Communications* page as shown in the following example. For more information on accessing the *Message Center*, refer to "Message Center" on page 329.



Title	Description	Version	Start Date	Actions
Clear Your Cache	Please clear your browser cache if you are having problems.	10.16	11/03/2013	 
MY NEW TEST	testing here	11.0.0	01/20/2019	 
NEW - Calls for Service Enhanced	* For those agencies using CFS (Calls for Service) we have implemented phase II enhancements as requested by users. Reach out to EJustice Operations if you have questions.	10.10.0.20110907	08/16/2011	 
NEW - Changes to Incident Report Printing	* Additional user selections have been incorporated into this software release. You now have new options for photo's and redaction of data when printing your incident report.	10.10.0.20110907	08/16/2011	 

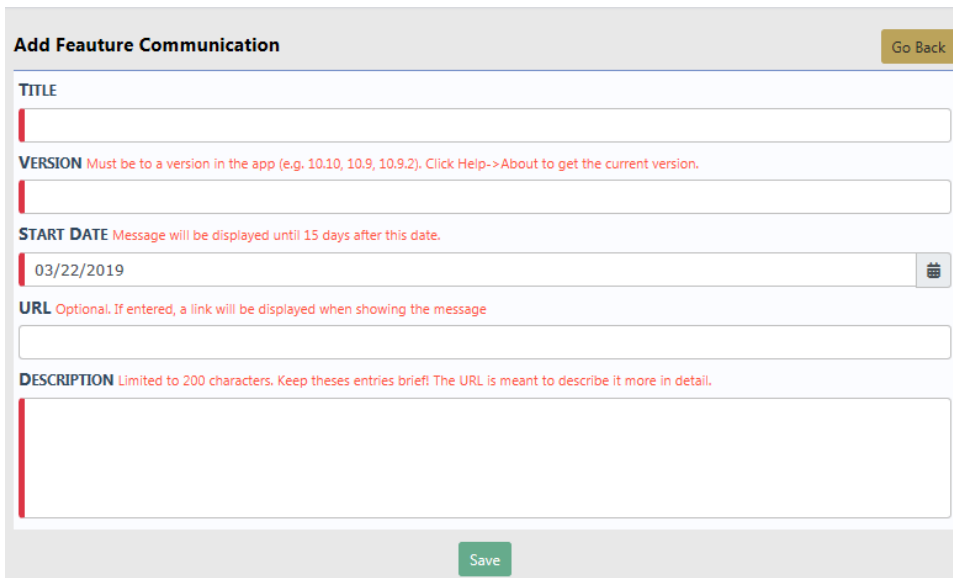
This page is used to manage communications to users about new features and changes to existing features.

- "Add Feature Communication" below for instructions on adding a communication.
- "Edit Feature Communication" on the next page for instructions on editing a communication.
- Click  in the **Actions** column to the far right of a listing to delete, then confirm deletion when prompted. (The listing no longer shows on the *Feature Communications* page.)

## Add Feature Communication

Use the following procedure to add a communication.


1. From the *Feature Communications* page, click the **Add Communications** button to open the *Add Feature Communication* page as shown. For more information on access the Feature Communications page, refer to "Message Center" on page 329.



**Add Feature Communication** Go Back

**TITLE**

**VERSION** Must be to a version in the app (e.g. 10.10, 10.9, 10.9.2). Click Help->About to get the current version.

**START DATE** Message will be displayed until 15 days after this date.  

**URL** Optional. If entered, a link will be displayed when showing the message


**DESCRIPTION** Limited to 200 characters. Keep these entries brief! The URL is meant to describe it more in detail.

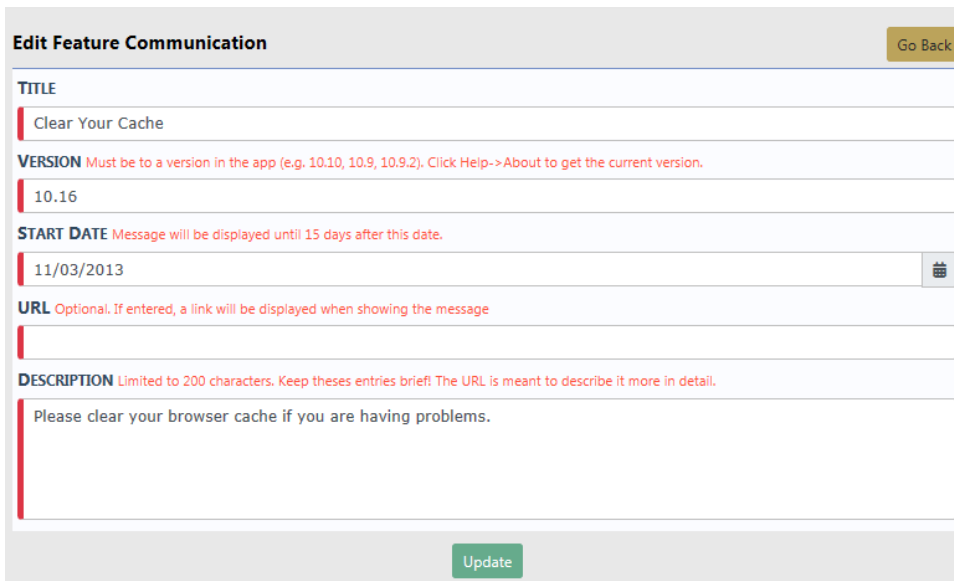
Save

2. After reading all instructions in red text, complete each of the required fields.
3. Click **Save** to save the message and return to the *Feature Communications* page with the new communication shown on the list.

## Edit Feature Communication

Use the following procedure to edit a feature communication.

1. From the *Feature Communications* page, click  in the **Actions** column to the far right of the listing you want to edit to open the *Add Feature Communication* page as shown. For more information on access the Feature Communications page, refer to "Message Center" on page 329.



**Edit Feature Communication** Go Back

**TITLE**  
Clear Your Cache

**VERSION** Must be to a version in the app (e.g. 10.10, 10.9, 10.9.2). Click Help->About to get the current version.  
10.16

**START DATE** Message will be displayed until 15 days after this date.  
11/03/2013

**URL** Optional. If entered, a link will be displayed when showing the message

**DESCRIPTION** Limited to 200 characters. Keep these entries brief! The URL is meant to describe it more in detail.  
Please clear your browser cache if you are having problems.

Update

2. Make changes as need to the content of each field.
3. Click **Update** to save the changes.
4. Click **Go Back** to return to the *Feature Communications* page where your changes will show in the edited listing.



# Chapter 21. Maintenance Values

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

Examples:

- Determine if incidents require approval all the time, regardless if offense exist or not.
- Allow agency to select specific charge violation related to an offense code.
- Enable level 2 approval for criminal complaints.
- Turn email notifications on or off at the application level.
- Set max file size for attachment uploads.
- Set number of days to increment case activity review date.
- CAD IP Address.
- Allow officers to select another agency within their organization when creating evidence.
- Enable fee collections of court papers.
- Require at least one narrative for a field arrest.
- Set a default warrant status when it is added to a field arrest.
- Display criminal complaints under recent activities that were submitted within a specified number of days.
- Require Off Duty and Service Interval when entering fuel/oil.
- Set max number of allowed pinned records users are permitted to have, if different than the default of 50.
- Optionally require at least one evidence processing record, if applicable to your agency.
- Default Chain of Custody to print in ascending order.
- Require Judge on Warrant Creation.

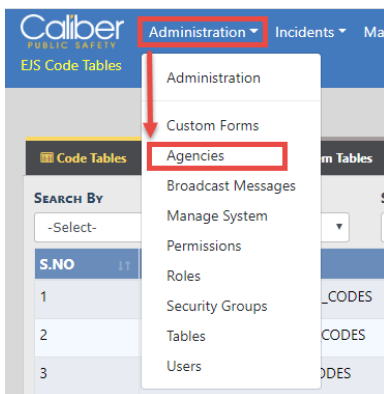
## Access Maintenance Values

There are two ways to access Maintenance Values, depending on your permissions:

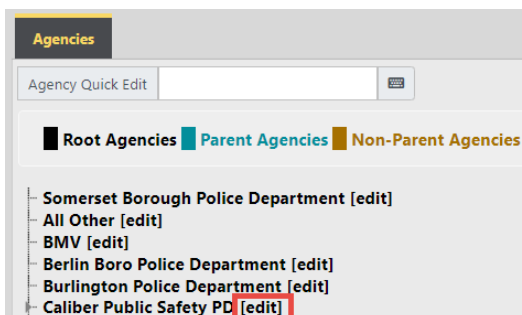
- Agency Profile - Settings Tab.
  - Settings for a specific agency.
- Administration top menu.
  - Schema-level settings (all agencies).

### Agency Profile Settings Tab

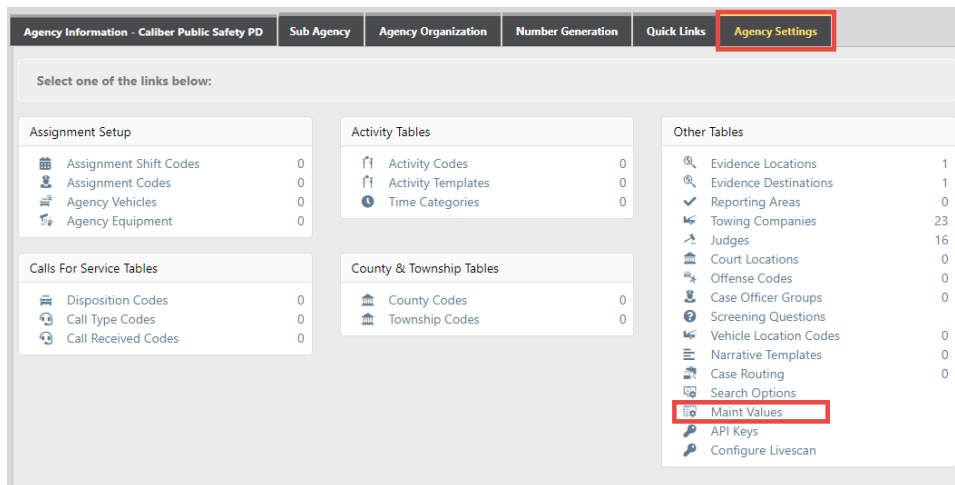
1. Click on the **Administration** top menu, then **Agencies** to open *Agencies*.



2. Click **[edit]** next to the appropriate agency to open the *Agency Profile*.



3. Click on the **Agency Settings** tab to display setting options, then click on **Maint Values** under the *Other Tables* section.



4. The *Agency Maint Values* table opens.

Agencies / Agency Settings / Agency Maint Values

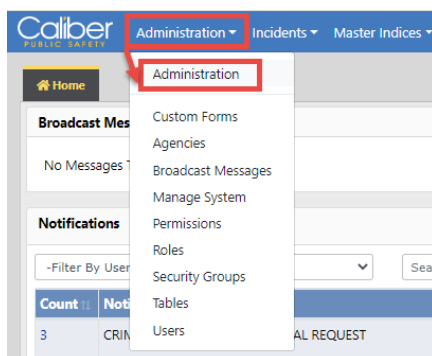
Show 10 entries

Go Back Add Maint Value

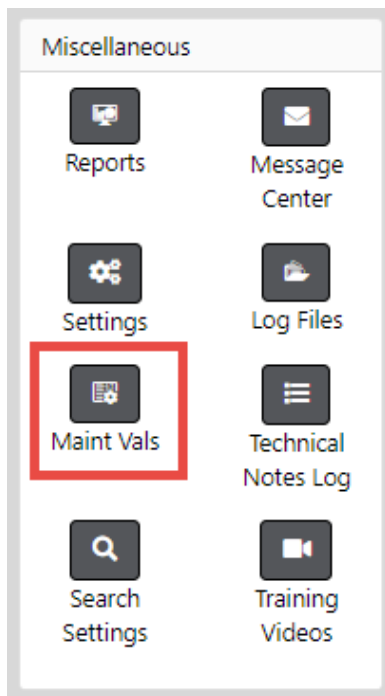
Keyword	Value	Description	Effective Date	End Date	Actions
CID_CASE_ADMIN	Y	Have CID users create cases from approved incidents,	11/21/2011		
CP_PARTY_ROLE_REQUIRED	Y	Whether at least one role is required when adding a person/org to be served on a court paper. Values Y or N Only.	12/18/2014		
ENABLE_INC_LOCATION_CATEGORIES	Y	Y = Enable Common Place Name And Location Category (e.g. Clerly) fields for the incident address page. N= disable	06/25/2015		

## Administration Top Menu

1. Click on the **Administration** top menu, then click **Administration** on the drop-down list.



2. Click the **Maint Vals** button under the *Miscellaneous* section.



3. The *Schema Maintenance Values* table opens.

Schema Maintenance Values						
Show 10 entries		Search:				
Keyword	Value	Description	Effective Date	End Date	Actions	
ADDR_COMMON_NAME_FREE_TEXT	N	Y=Allow free-text entry for common place name on master address, N=Must select from pick list.	06/15/2015			
ADDRESS_COLLAPSE	06/08/2020	Start date used in Address Collapse	09/24/2009			
ALWAYS_REQUIRE_LOC_CATEGORY	Y	Y or N. When enabled, will require a common place category even if no common place names are available. Only applies when ENABLE_INC_LOCATION_CATEGORIES is enabled	08/02/2016			
APPROVAL_REQ	Y	Determines if incidents require approval all the time regardless if offenses exist or not.	01/01/2010			
ARREST_CHARGE_CODES	Y	Allow agency to select specific charge violation related to an Offense code	04/02/2010			

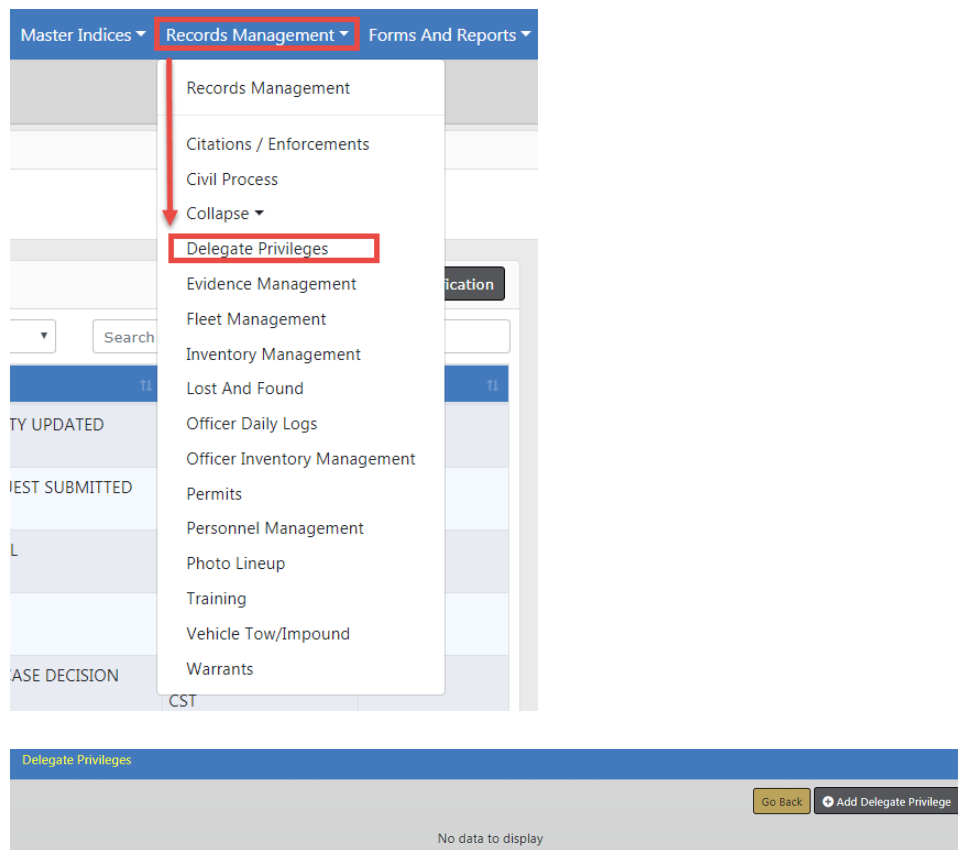
# Chapter 22. Delegate Privileges

The Delegate Privileges feature allows users with certain administrative functions to transfer their privileges (roles) to other RMS users. For example, a user going away on vacation for two weeks might delegate certain of their roles to another user during that period of time. The next time the delegated user logs into the application, he will have the privileges associated with the delegated roles.

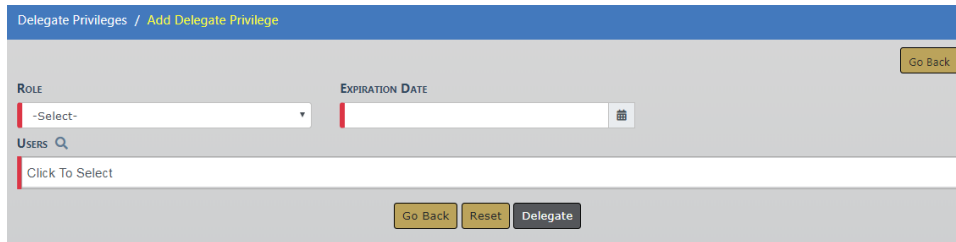
- It is up to the agency to decide whether to use this functionality or not.
- A user is only able to delegate the privileges (roles) that have been assigned to them.


Use the following procedure to delegate privileges.

1. Click the **Records Management** label on the top navigation bar, then click the **Delegate Privileges** option to open the *Delegate Privilege* page as shown.



2. Click the **Add Delegate Privilege** button in the upper right corner to display the *Add Delegate Privilege* page.



3. Select the **Role** for which you wish to delegate privileges. (It may already appear in the field by default, but can be changed.)
4. Enter the **Expiration Date**.
5. Select the **User** by entering in the user's name then selecting the appropriate user(s) from the displayed list, or click on the search icon  to open the search window.
6. Click **Delegate** to delegate the privileges associated with the specified role to the specified users and redisplay the *Delegate Privilege* page with the delegation listed in the grid.

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