Caliber
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Online RMS

11.7

Administrator Guide

August 2021

Caliber Public Safety

Online RMS 11.7

Administrator Guide

August 2021

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www.caliberpublicsafety.com

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Phone (24/7 support line):	800.274.2911
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Email:	TechSupport@caliberpublicsafety.com

Before you call, e-mail or fax, please gather the following information:

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

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

Document Information

Software	Document Type	Technical Writer
Caliber Online RMS 11.7	Administrator Guide	Christine Saur (latest revision)

Abstract or Description:

The Online RMS Administrator Guide contains information and instructions for personnel who provide administrative support to agencies.

Rev #	Date	Comment
1	03/01/2020	Version 11.3.0 Upgrade
2	08/01/2020	Version 11.4.0 Upgrade
3	12/01/2020	Version 11.5.0 Upgrade
4	04/01/2021	Version 11.6.0 Upgrade

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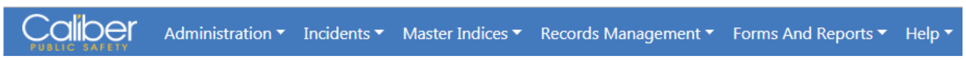
Chapter 1. Introduction

Access Administration

Use the following procedure to access Online RMS Administration.

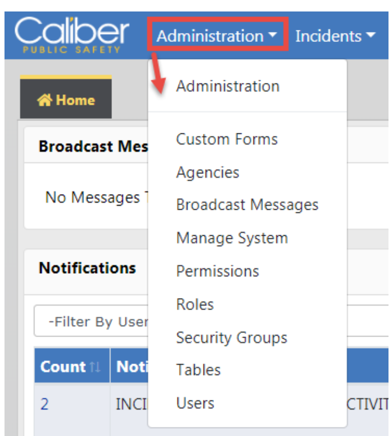
1. Open the RMS application to the *Home* page to display the Navigation bar as shown.



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.

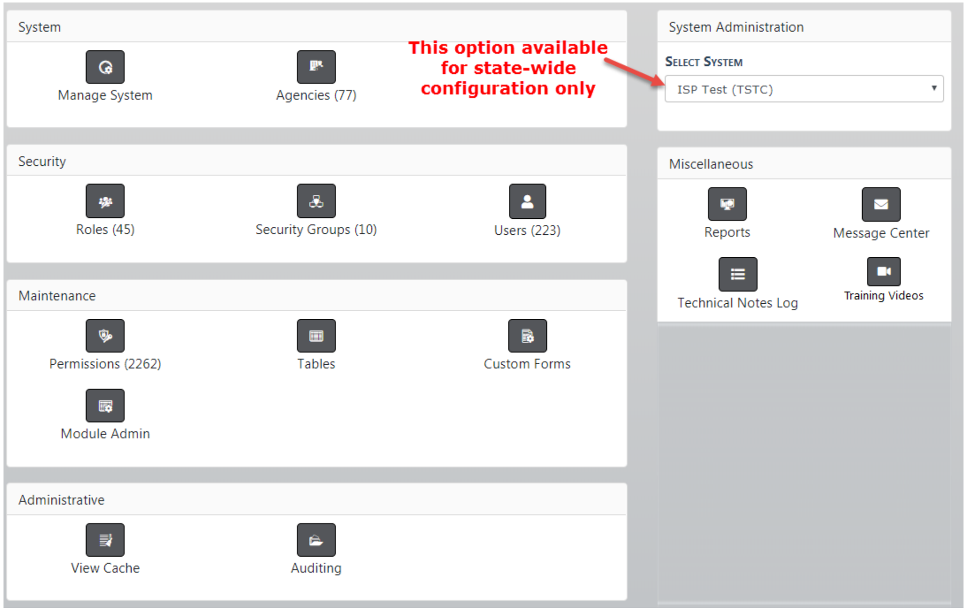
2. Perform one of the following steps:

- 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.



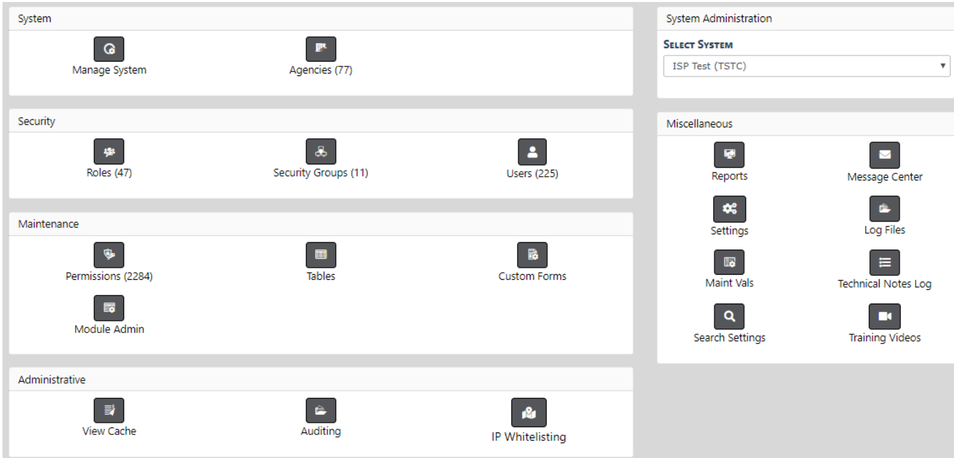
Note: The appearance of the menu and page varies depending upon your agency's set-up.

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

Levels of Administration

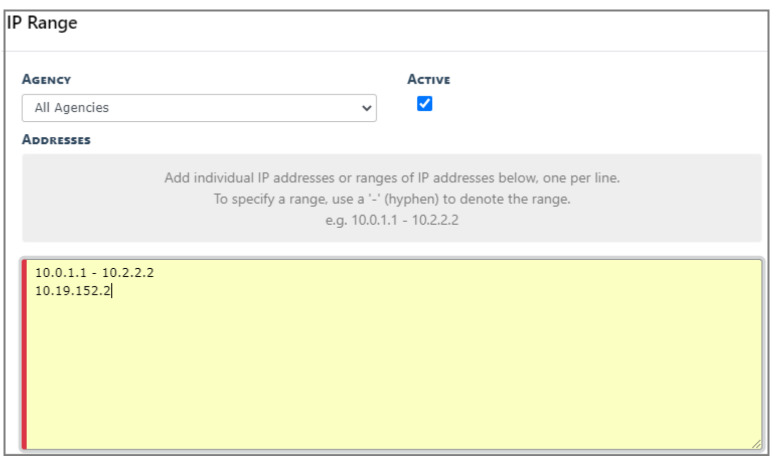
Company Level

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



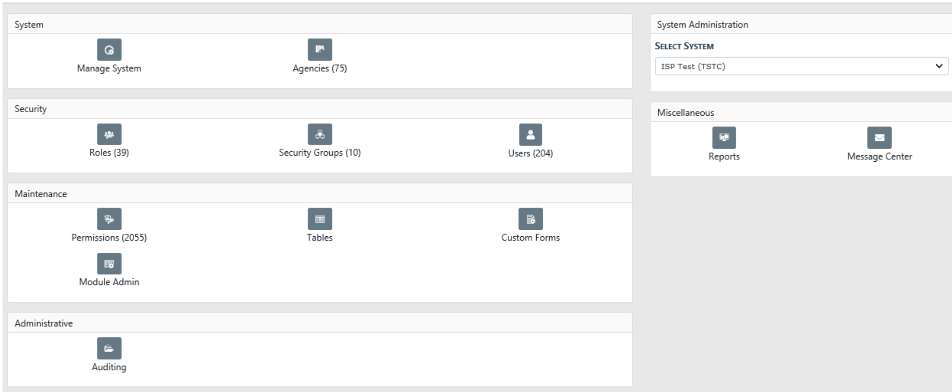
For agencies having security requirements to not allow access to Caliber Online RMS outside of approved networks, Caliber Public Safety personnel can define the following settings via the **IP Whitelisting** icon under the *Administrative* section:

- 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.



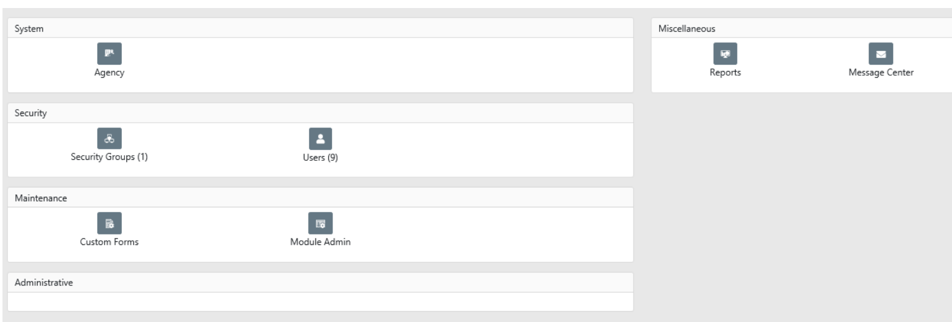
Schema Level

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

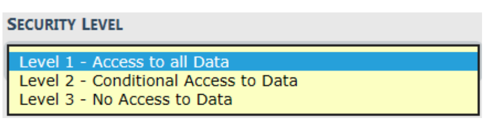
Officer role while other users are given permissions to perform other tasks by the Patrol Supervisor role.

- 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.

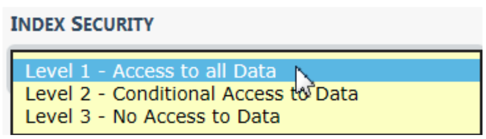
Master Indices Security Levels



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

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

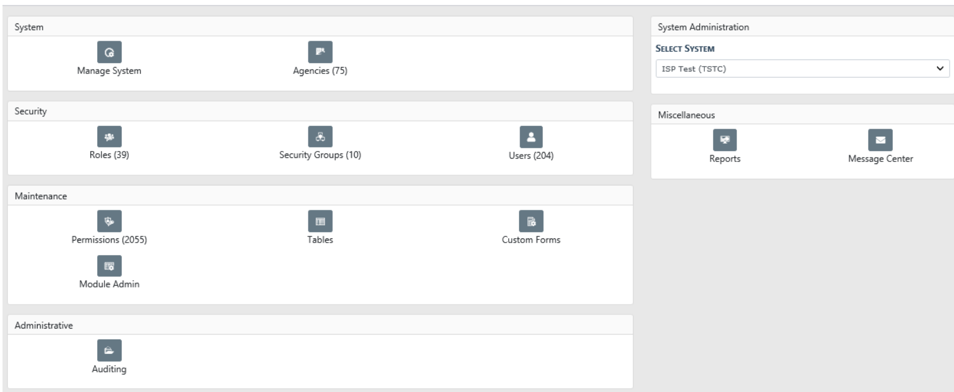
User Account Index Security Levels



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

Chapter 2. System Administration

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



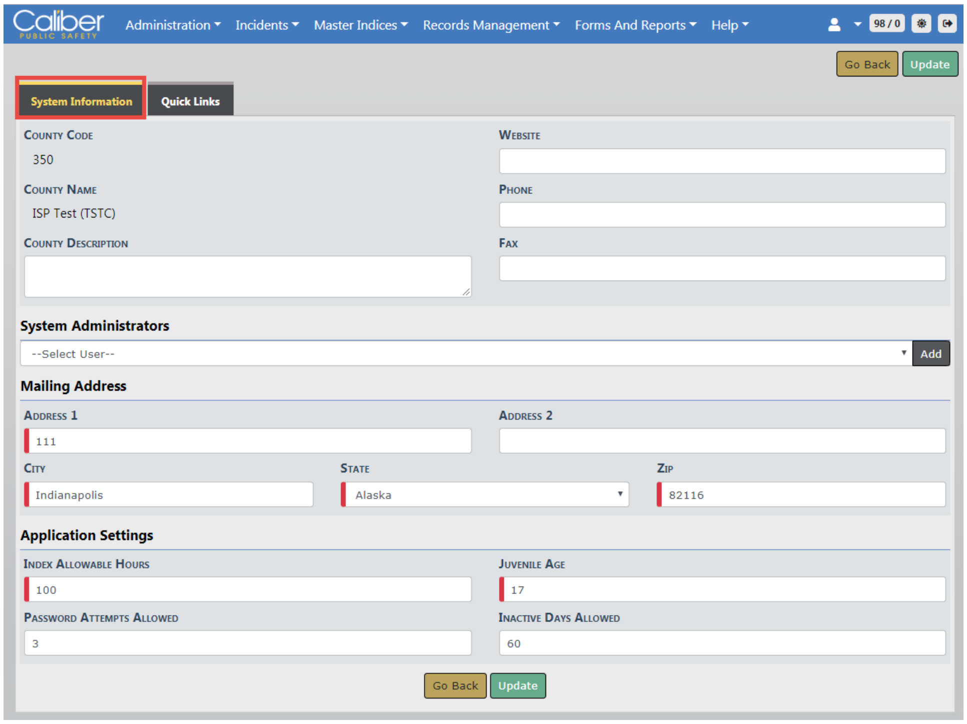
If a particular schema has more than one agency involved, there will be a **Select System** selection list in the upper right corner of the screen. If you are an administrator with permissions for multiple agencies, use this drop-down list to select an agency. Most administrators, however, only have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

System Information

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

1. From the *Administrative Home* page, click the **Manage System** icon to open the *Manage System* page. For details on accessing the Administration Home page, refer to "Access Administration" on page 1

2. If needed, click the **System Information** tab to bring it to the front as shown.



3. Make changes as needed to the fields in the **System Information** section. The County Code and County Name are read-only, they are not modifiable.

4. Select the **System Administrator** from the list.

5. Make changes as needed to the fields in the **Mailing Address** section.

6. Make changes as needed to the fields in the **Application Settings** section.

7. Click **Update** to display the message, *System updated successfully*.

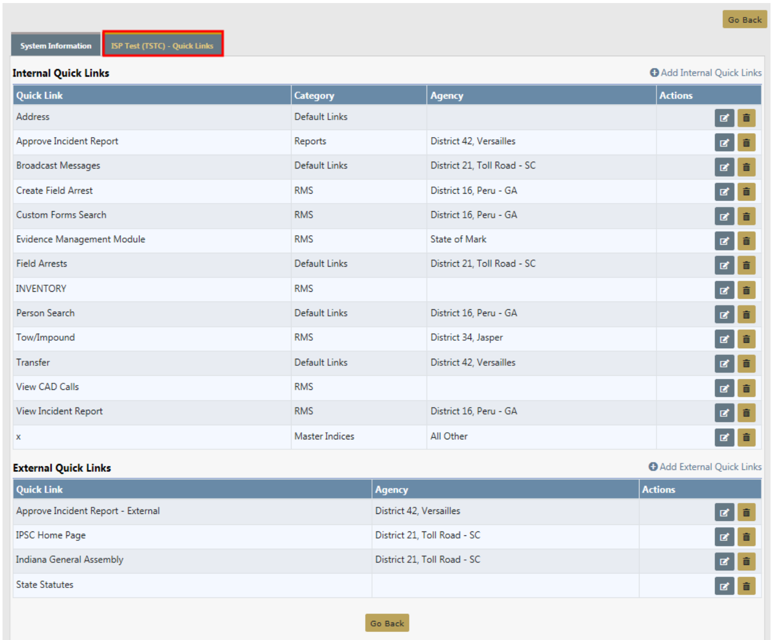
Quick Links

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

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

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

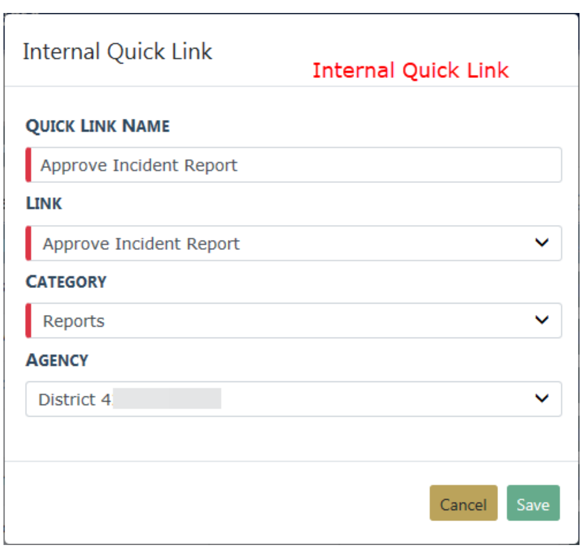
1. Click the **Quick Links** tab to bring it to the front as shown.

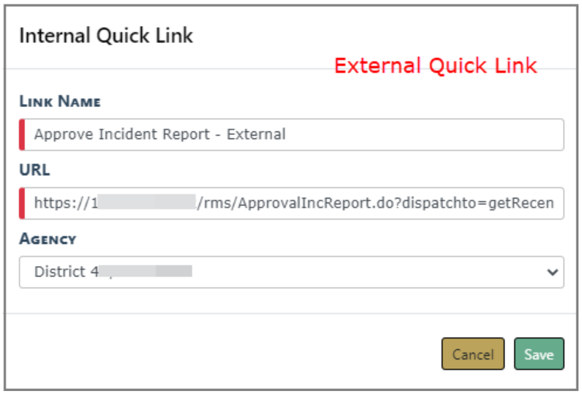


2. You can edit an existing link or add new.

   a. To **Edit**

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





- Select and type changes in the fields as needed.

b. To **Add New**

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

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

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

Chapter 3. Attachments

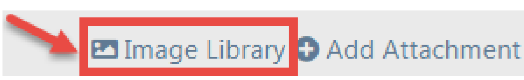
Attachments Overview

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

Attachments appear in a grid, or columnar format.

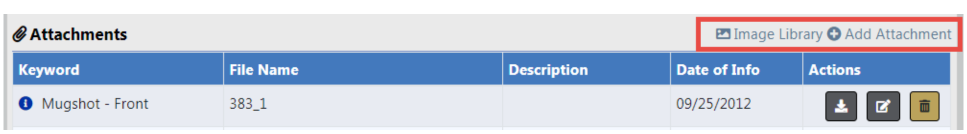
You can edit and delete attachments that were only created by you. Users with administrator privileges have the ability to edit and delete attachments for any user.

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

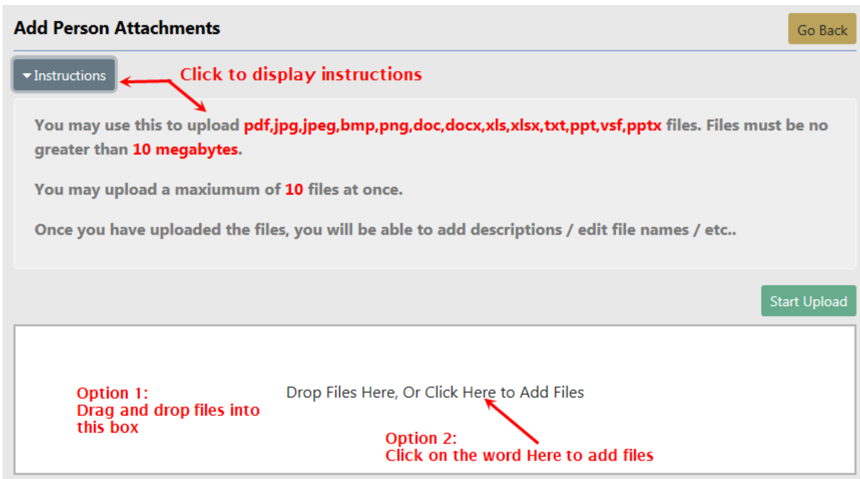
Several Online RMS modules support **Attachments**. Access the module and record that contains the **Attachment** you need to add. For example, to add an Attachment tied to a person, go to that person record and page down to the **Attachment** section, then follow the directions below.



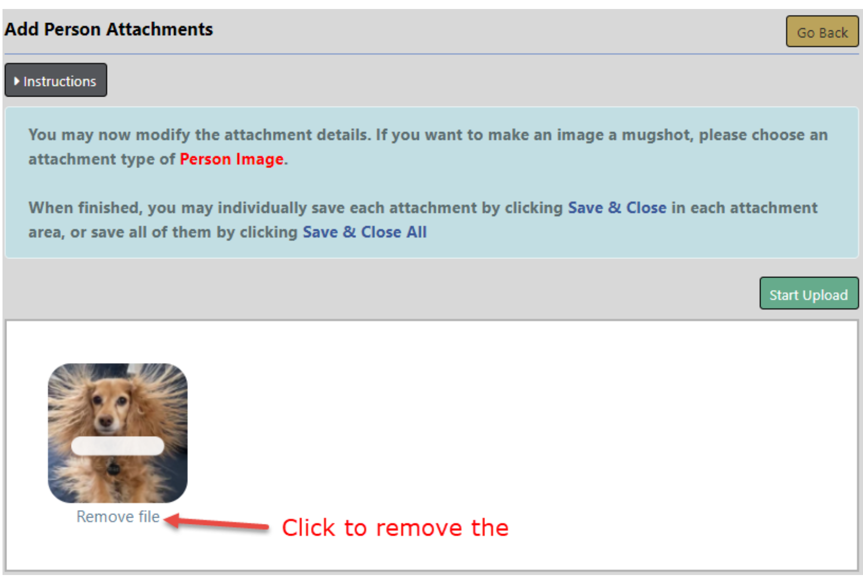
1. Click on the **Add Attachment** link to begin the upload process. For information on the **Image Library** link, refer to "Attachments Overview" on the previous page.

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

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

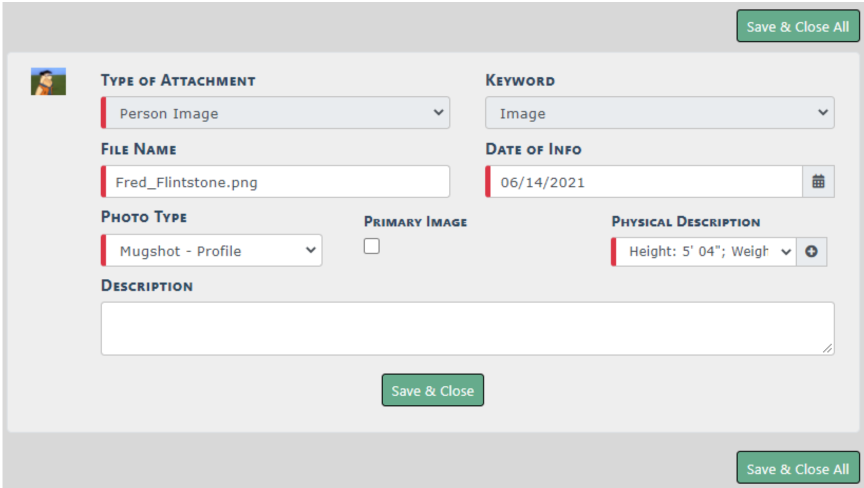


   b. When all the files are in the **Queue**, click **Start Upload** button to add the attachments. Click on **Remove File** to remove from the Queue.



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

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



d. Click **Save & Close** to save each attachment individually, or click **Save & Close All** to save all of them at once.

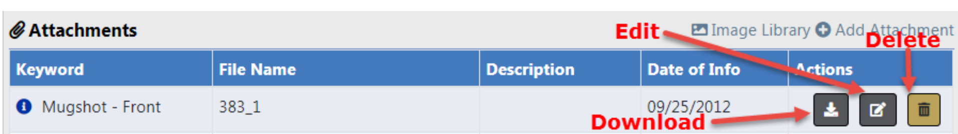
e. The attachments then appear in the **Attachments** grid. You can view additional information, download, edit, or delete the attachment.

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.

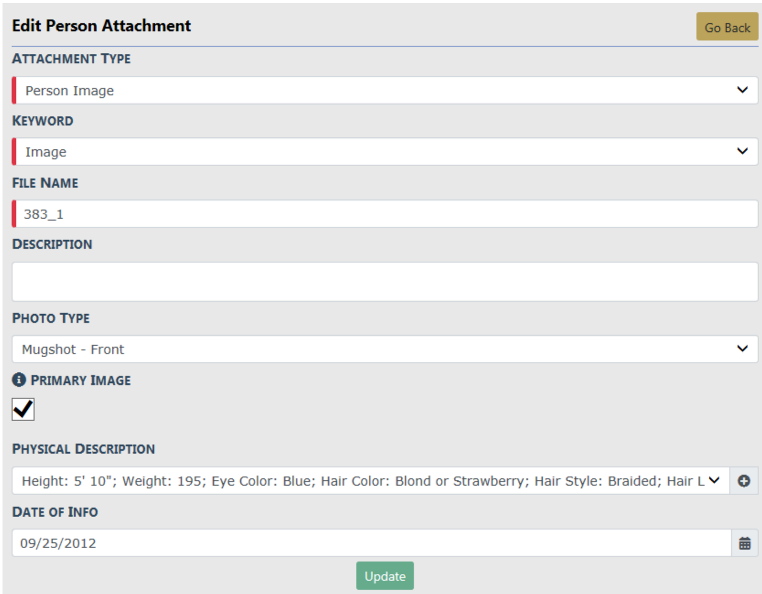
1. Click the edit icon on the record you need to update.



Note: You cannot update attachments created by another user.

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

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

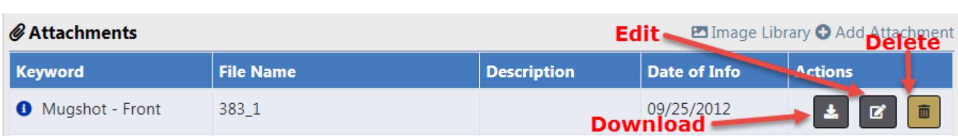


3. Click **Update** to update the record, or click **Go Back** to return to the previous window without saving.

Delete Attachments

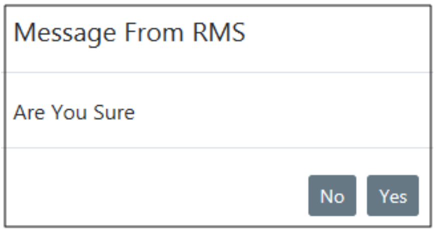
Several Online RMS modules support **Attachments**. Access the module and record that contains the **Attachment** you need to delete. For example, to delete an **Attachment** tied to a person, go to that record and page down to the **Attachment** section, then follow the directions below.

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



NOTE: You cannot delete attachments created by another user.

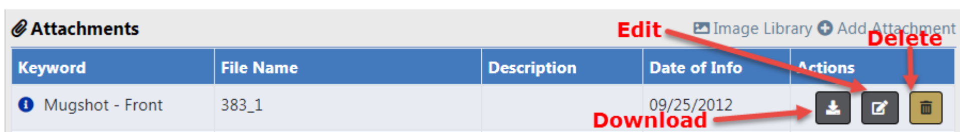
2. A confirmation window appears. Click **Yes** to delete or **No** to return to the previous window without deleting.



Download Attachments

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

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



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

Chapter 4. Manage Agencies

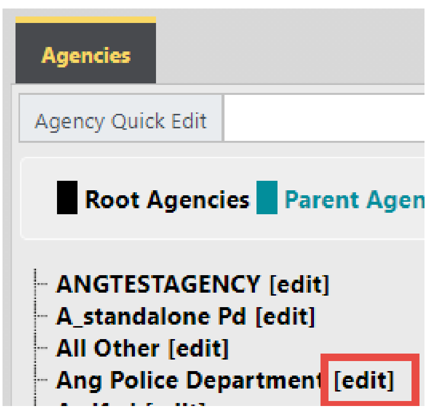
Manage Agencies Overview

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

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

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

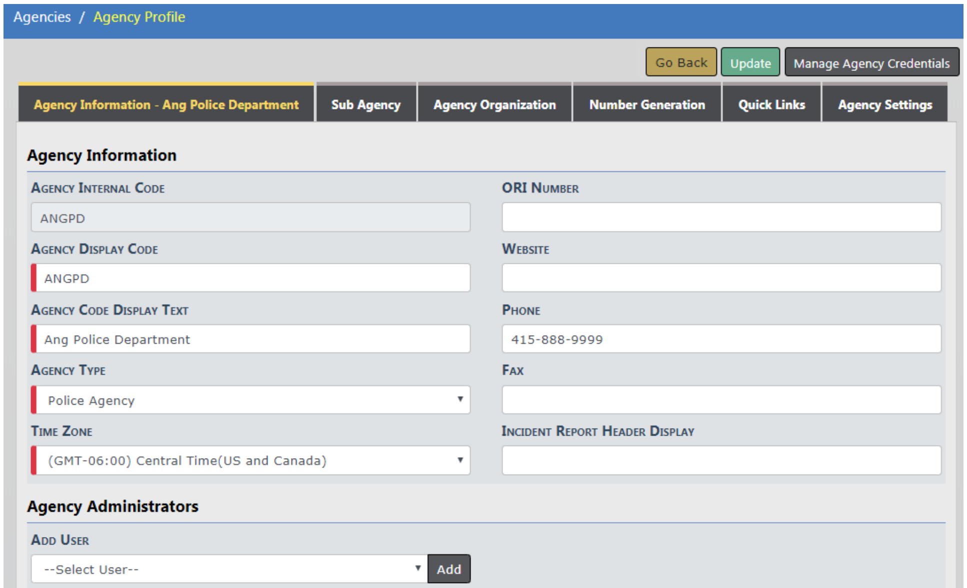
To update an agency, click **[edit]** next to an agency name to open the existing *Agency Profile*.



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

Agency Profile

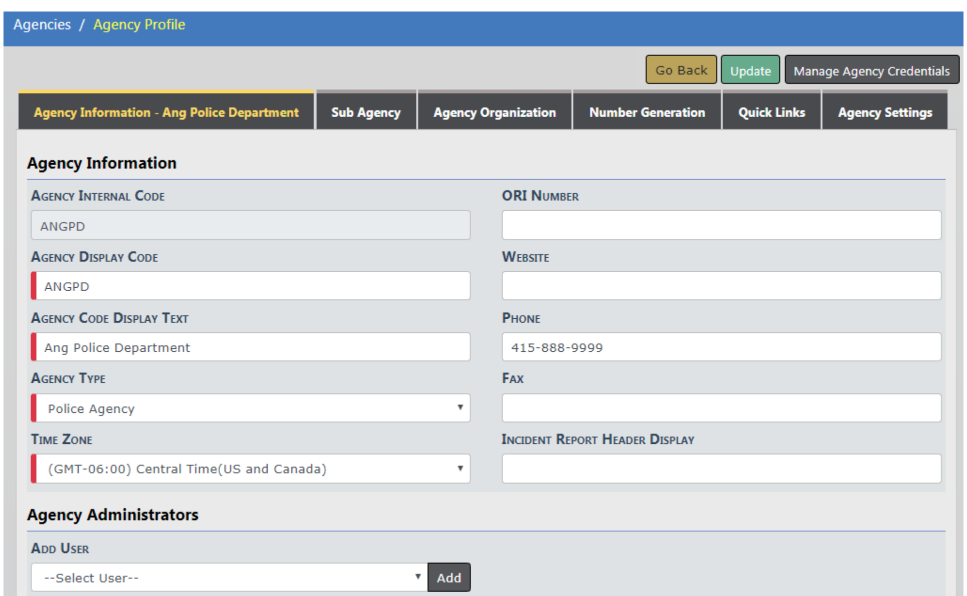
From the *Manage Agencies* page, click **[edit]** next to an agency to open the *Agency Profile* page for that agency. The *Agency Profile* contains up to six tabs. You may or may see all tabs, depending on your permissions.



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

Agency Information Tab

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



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

Agency Information

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

Agency Administrators

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

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

Agency User Subscriptions

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

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

Agency User Subscriptions Manage Subscription Counts

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

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

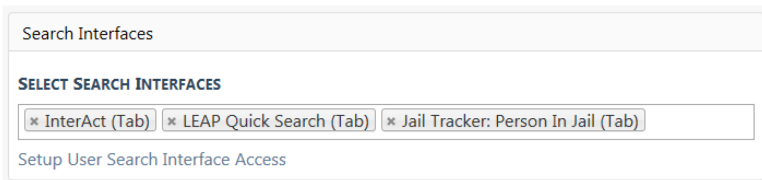
You have reached the maximum number of active named user accounts for your Organization. Please contact support to add additional user accounts or deactivate an existing user account.

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.



Attachment Interfaces

Jail Tracker - Facilities to Search

State Submissions Configuration

Miscellaneous

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

NIBR City Indicator

Address Information

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

Agency Logo

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

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

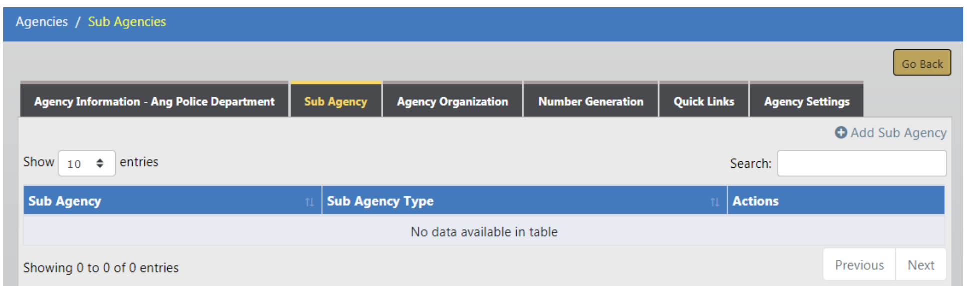
If needed, click the **Manage Agency Credentials** button to add or update *Credentials*; the user name and password for a NIBRS Portal as an example.

Sub Agency Tab

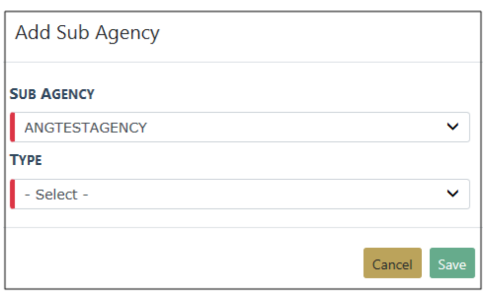
A sub agency is one for which the primary agency dispatches in response to calls for service. The **Sub Agency** tab is used to add sub agencies and to delete them.

Use the following procedure to add a sub agency.

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



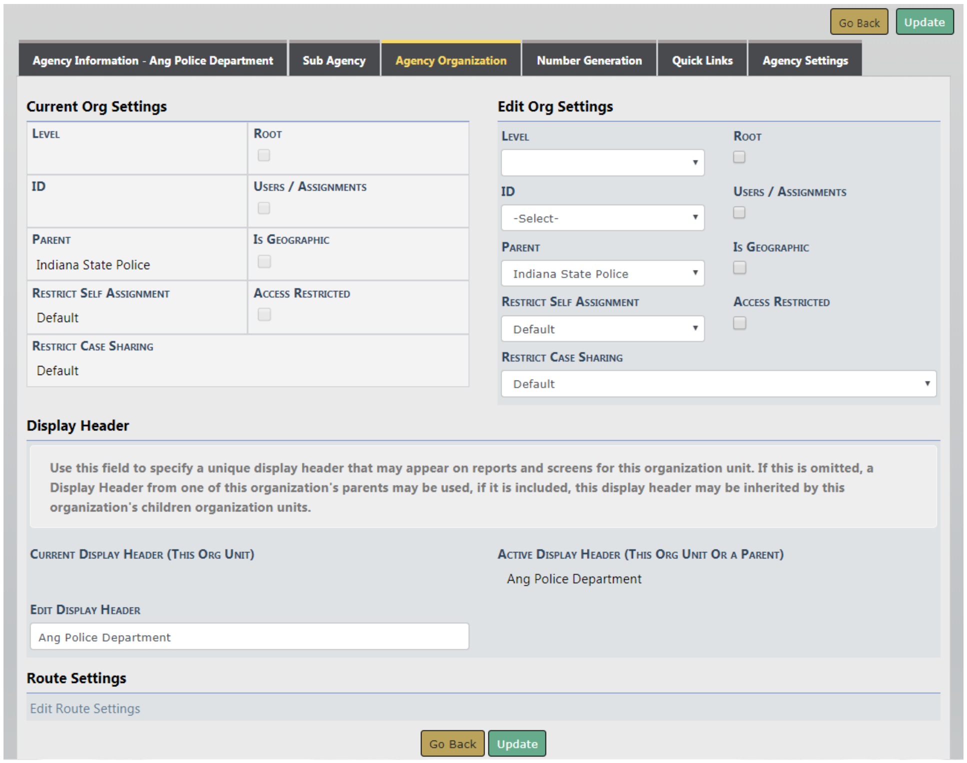
3. Click the Add Sub Agency link to open the *Add Sub Agency* window.



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

Agency Organization Tab

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



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

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

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

Current Org Settings: Display the current settings.

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

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

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

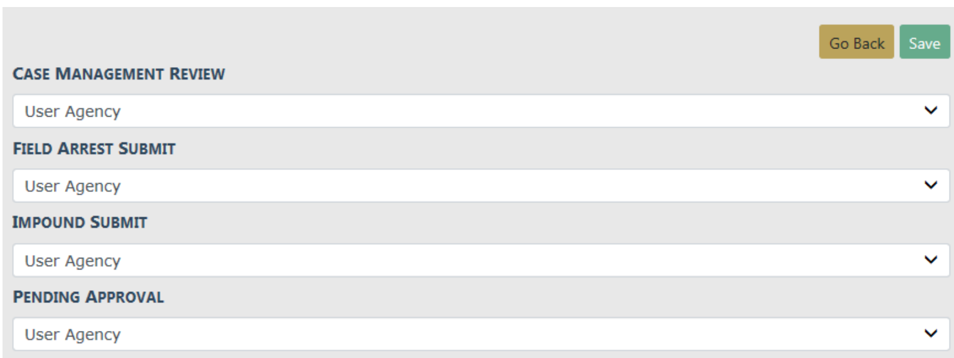
Current Display Header (This Org Unit)

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

Active Display Header (This Org Unit Or a Parent)

Route Settings:

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



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.

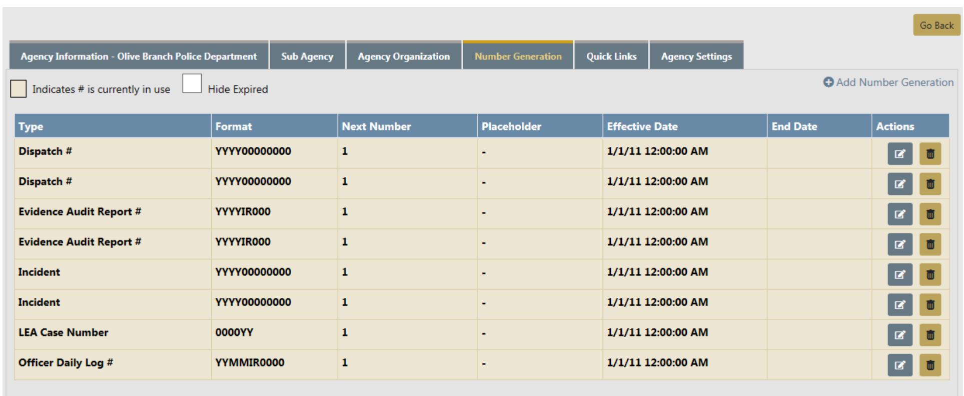
For more information about *Community Reporting* public forms, refer to “Community Reporting with Custom Forms” on page 270.

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

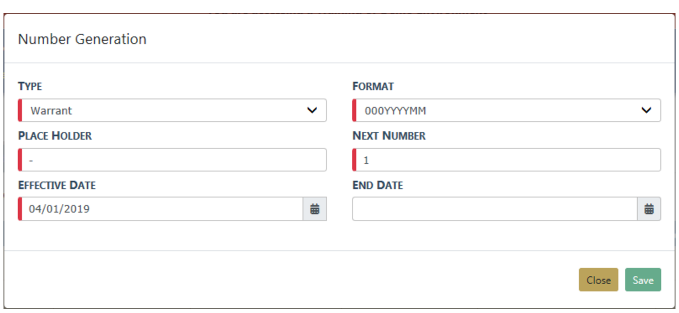
1. On the *Administrative Home* page, click the **Agencies** icon to display the *Manage Agencies* page.

2. Click **[edit]** in the same row as an agency listing to open the *Agency Profile* page for that agency.

3. On the *Agency Profile* page, click the **Number Generation** tab to bring it to the front as shown.



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



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

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

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

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

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

7. Enter the **Place Holder**.

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

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

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

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

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

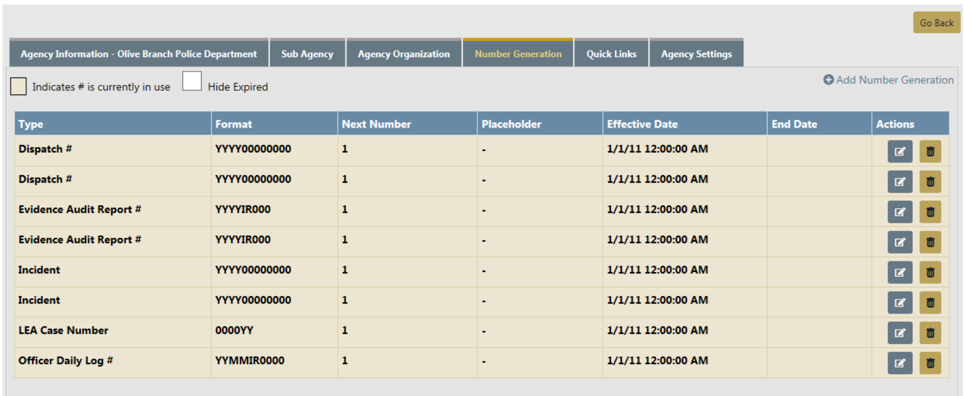
Edit Number Generation

Use the following procedure to edit a number generation.

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

2. Click **[edit]** on the same row as an agency listing to open the *Agency Profile* page for that agency.

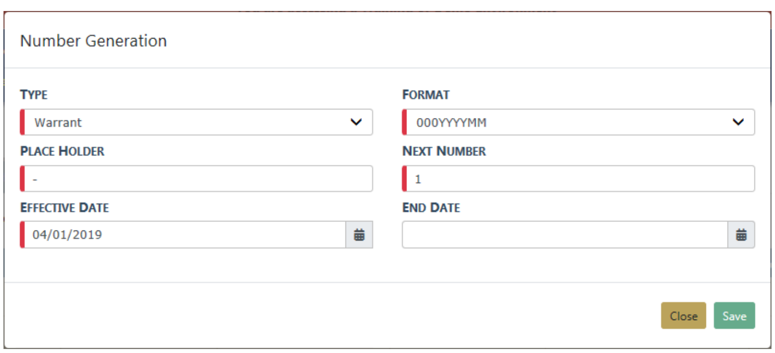
3. On the *Agency Profile* page, click the **Number Generation** tab to bring it to the front as shown.



Type	Format	Next Number	Placeholder	Effective Date	End Date	Actions
Dispatch #	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.



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.

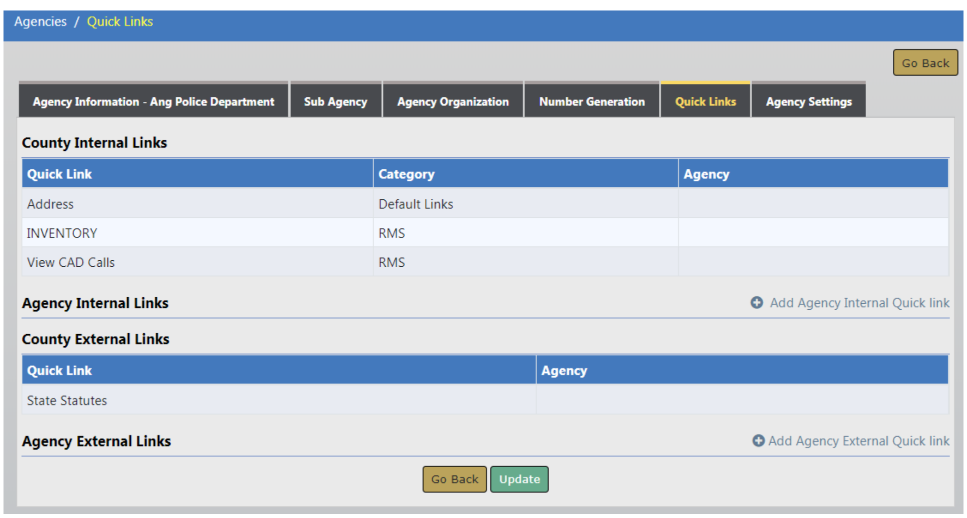
5. Click  to the far left in the same row to display the prompt, *Are you sure?*

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.



- "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.

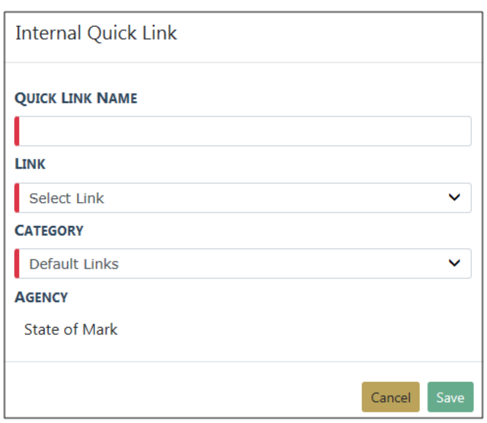
3. Click **Update** to save the changes, close the window, and return to the *Agency Quick Links* page.

Add Quick Link

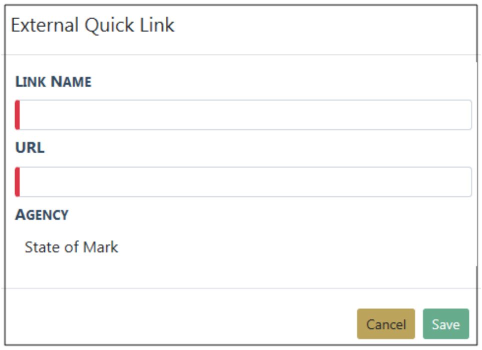
Use the following procedure to add a quick link.

1. Determine if you want to add an internal quick link or an external quick link.

   - Click <u>Add Agency Internal Quick Link</u> to open the *Add Agency Internal Quick Link* window.

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

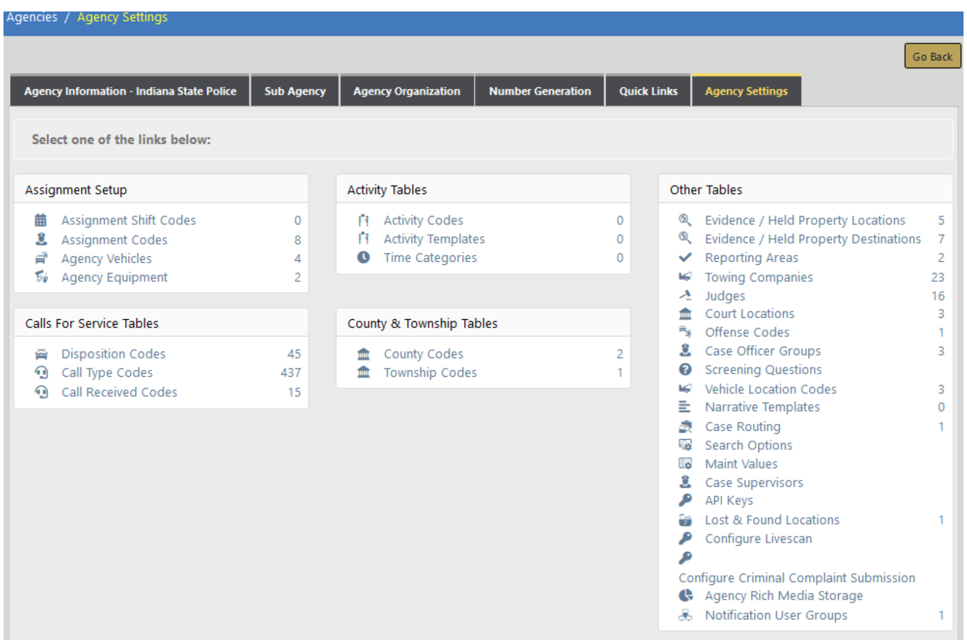


2. Complete all the fields on the window.

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*.



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.

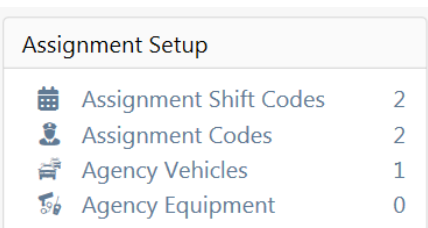
Calls for Service Tables Panel – "Calls for Service Tables" on page 44.

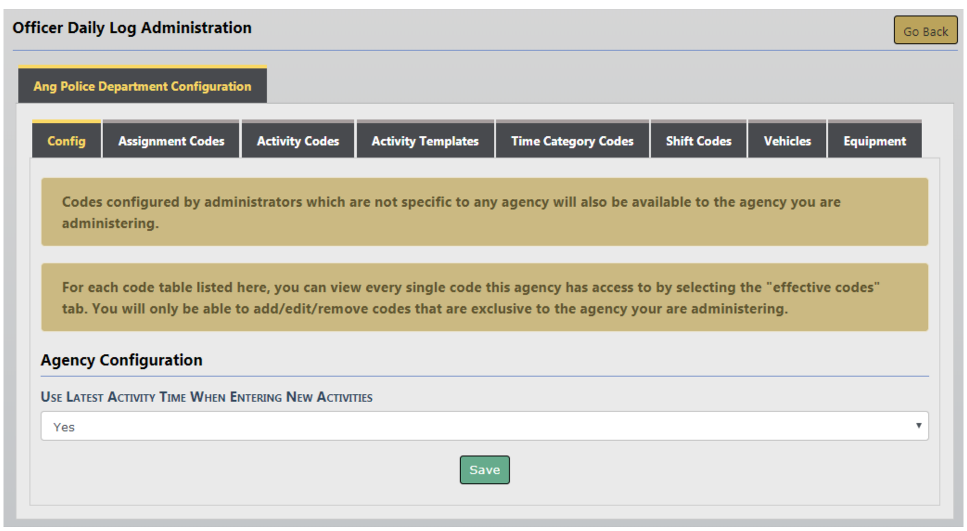
County and Township Tables Panel – "County and Township Tables" on page 48.

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

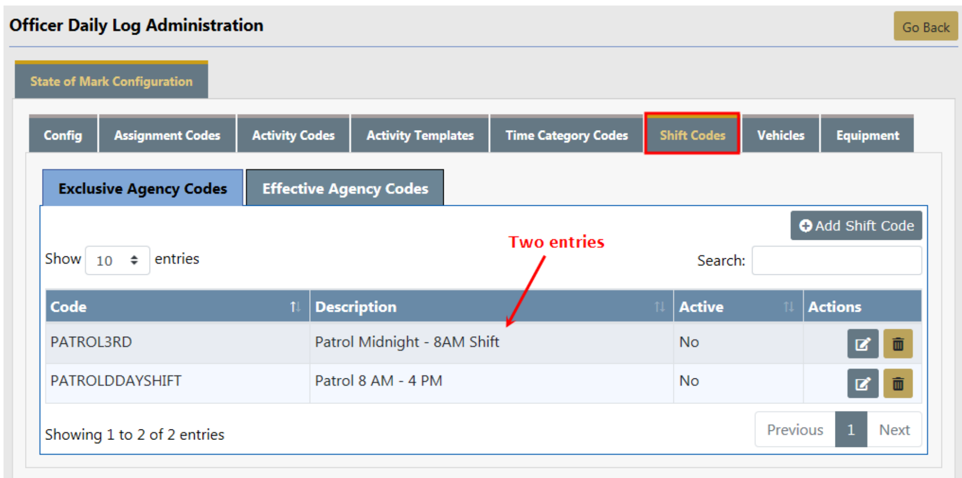
Assignment Set up

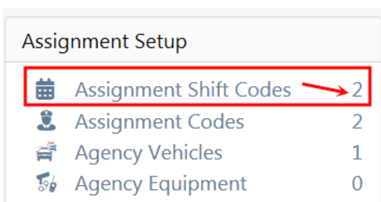
The **Assignment Setup** panel contains four links to the *Officer Daily Log Administration* page which contain several tabs of information. Each link in the **Assignment Setup** panel display a total record count of information that exists in particular tabs of the *Officer Daily Log Administration*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





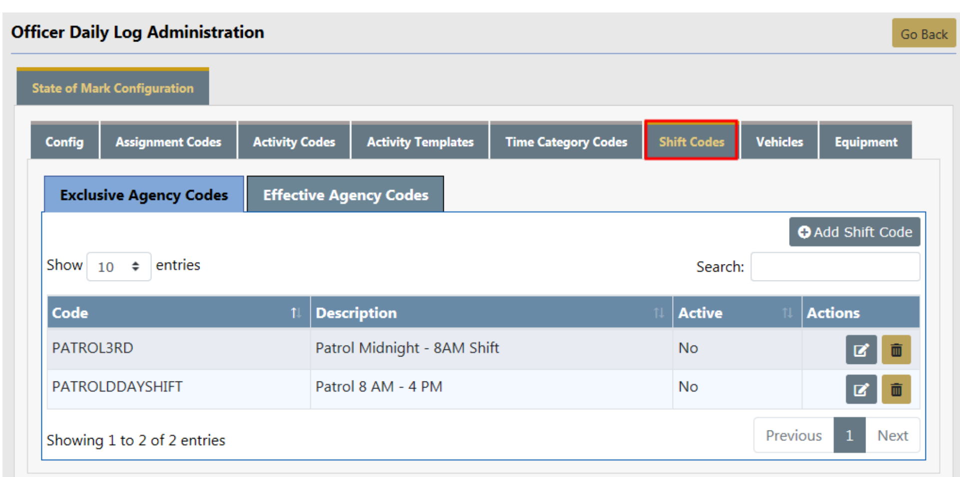
For example, the Assignment Shift Codes in the **Assignment Setup** panel ties to the Shift Codes tab of the *Officer Daily Log Administration* page. If two entries in the Shift Codes tab exist, then the number 2 appears to the right of the Assignment Shift Codes in the **Assignment Setup** panel.



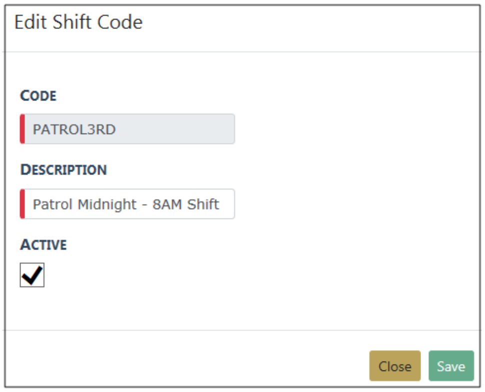


Assignment Shift Codes

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



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



– Change field content as needed.

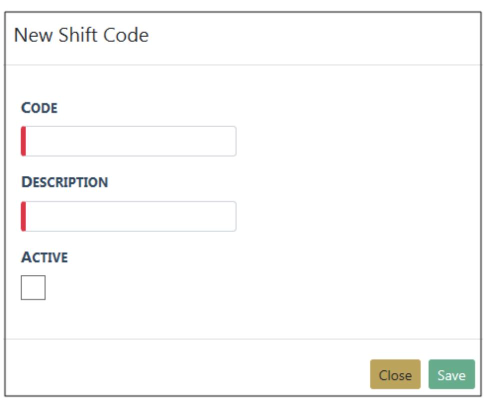
– Check the **Active** box to activate/deactivate the code. (If a code is active, *Yes* displays in the **Active** column to the right of that code listing on the *Assignment Shift Codes* page, if not, *No* displays.)

– Click **Save** to update the assignment shift code and close the window; click **Close** to cancel changes and close the window.

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

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

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



– Complete the **Code** and **Description** fields. Shift Code must be UPPERCASE.

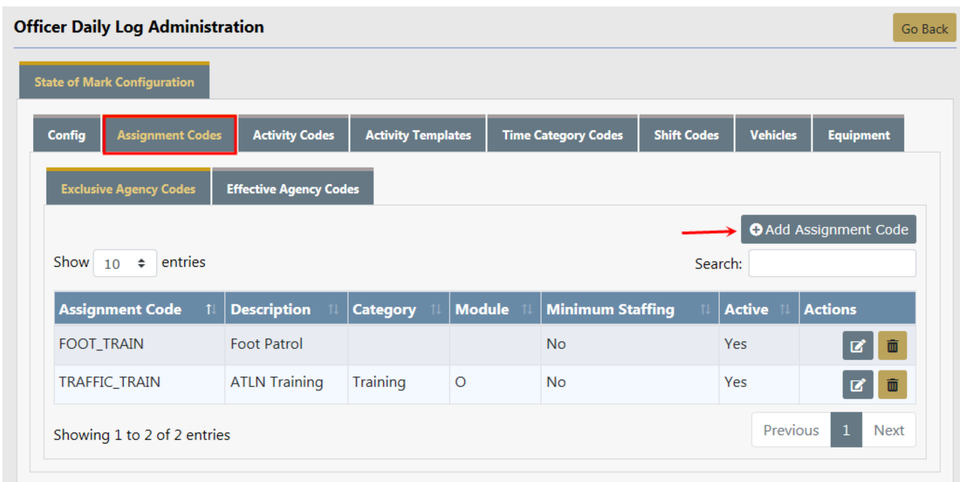
– Check the **Active** box to activate the code. (If a code is active, *Yes* displays in the **Active** column to the right of that code listing on the *Assignment Shift Codes* page, if not, *No* displays.)

– Click **Save** to add the assignment shift code and close the window; click **Close** to cancel and close the window.

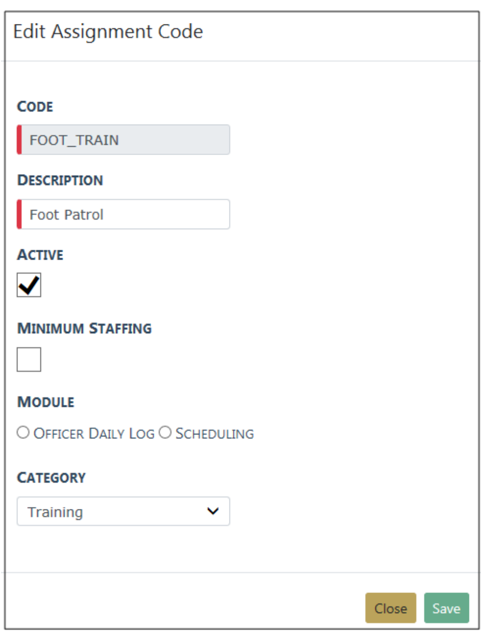
- Click **Go Back** to close the *Assignment Shift Codes* page and return to the *Agency Settings* page.

Assignment Codes

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



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



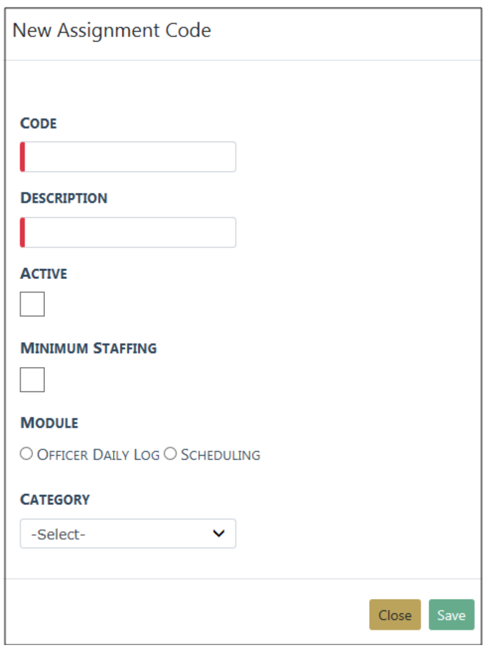
– Change field content as needed.

– 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.



– Complete the **Code**. Enter letters and/or numbers. Letters must be in UPPERCASE.

– Add a **Description**

– Check the **Active** box or leave it blank to make it inactive.

– Optionally click **Minimum Staffing**.

– Optionally select one **Module**.

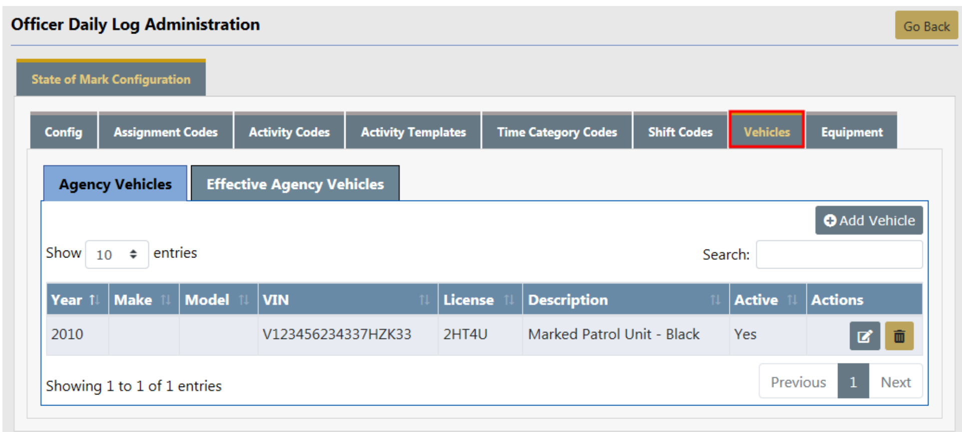
– Optionally select a **Category** from the list.

– Click **Save** to add the assignment code and close the window; or click **Close** to cancel and close the window.

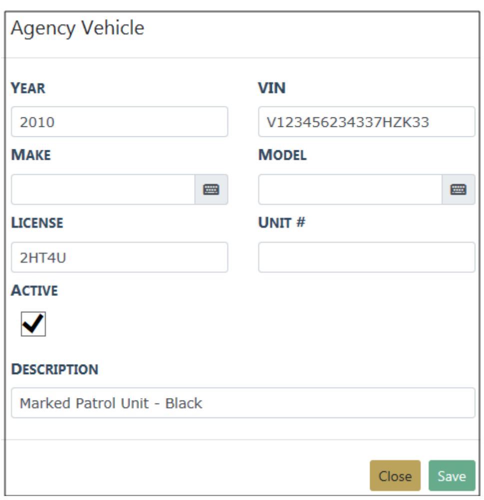
- Click **Go Back** to close the *Assignment Codes* page and return to the *Agency Settings* page.

Agency Vehicles

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



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



  – Change field content as needed.

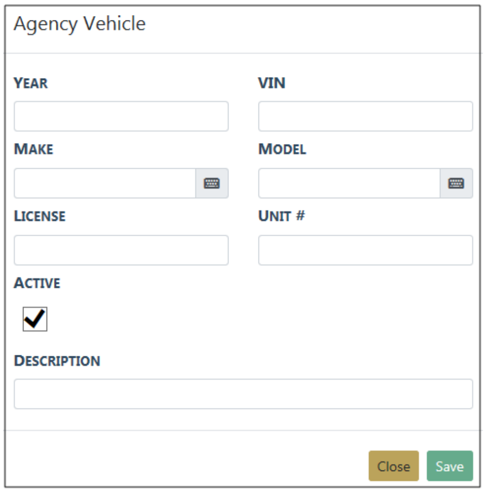
  – Check the **Active** box to activate the vehicle. (If a vehicle is active, *Yes* displays in the **Active** column to the right of that code listing on the *Agency Vehicles* page, if not, *No* displays.)

  – 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.

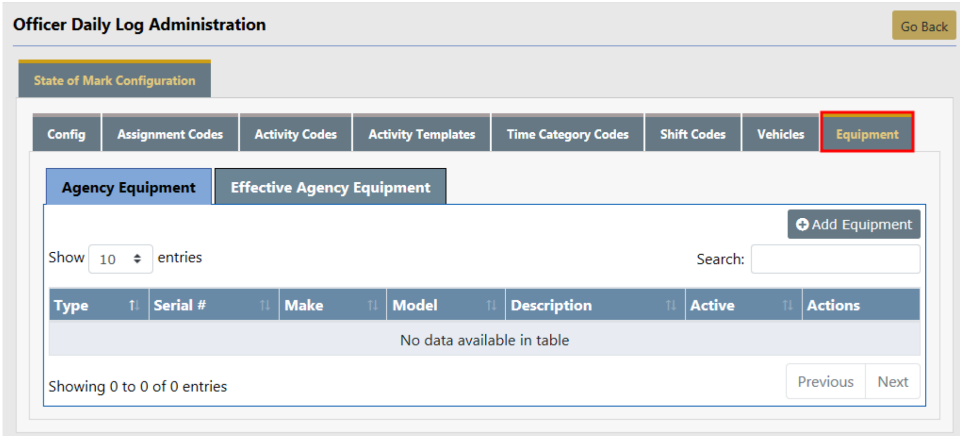
  – Complete fields.

  – 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

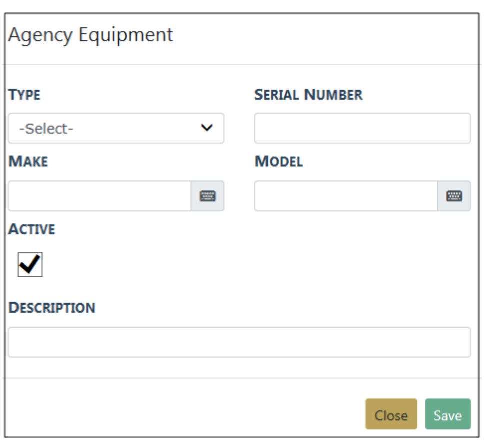
Click the Agency Equipment link to open the *Officer Daily Log Administration* page, then click the **Agency Equipment** tab.



- 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.



  - Complete fields.

– Click **Save** to add the equipment and close the window; click **Close** to cancel and close the window.

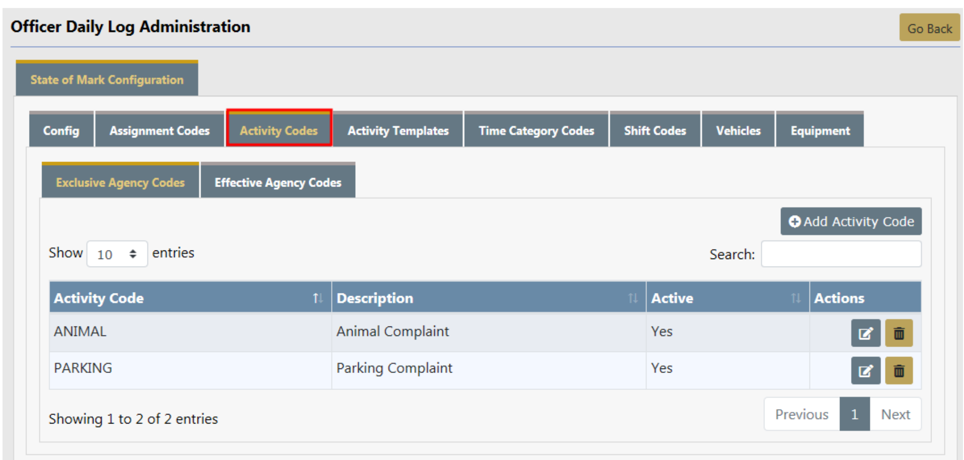
- Click **Go Back** to close the *Agency Equipment* page and return to the *Agency Settings* page.

Activity Tables

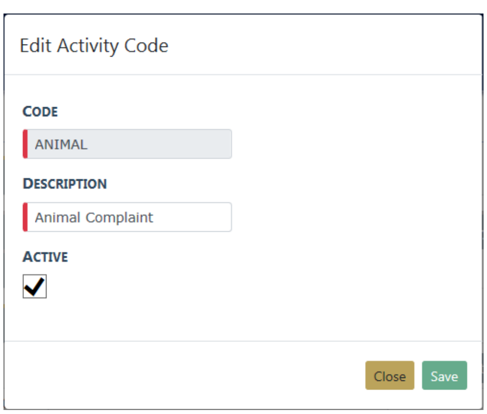
The **Activity Tables** panel contains three links, each of which is described below.

Activity Codes

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



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



– Change field content as needed.

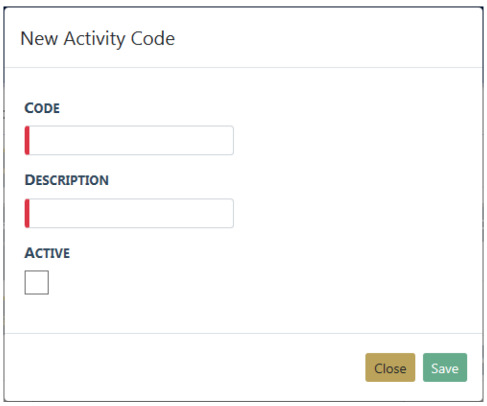
- Check the **Active** box to activate the code. (If a code is active, *Yes* displays in the **Active** column to the right of that code listing on the *Activity Codes* page, if not, *No* displays.)

- 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.



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

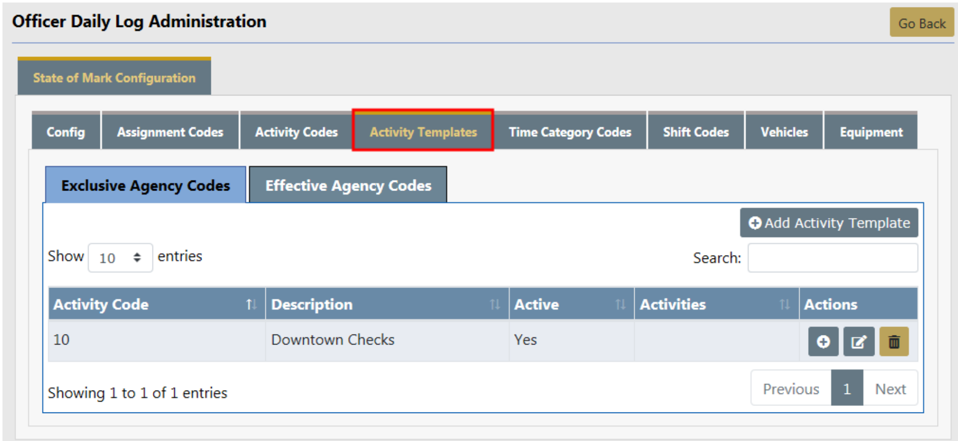
- Check the **Active** box to activate the code. (If a code is active, *Yes* displays in the **Active** column to the right of that code listing on the *Activity Codes* page, if not, *No* displays.)

- Click **Save** to add the activity code and close the window; click **Close** to cancel and close the window.

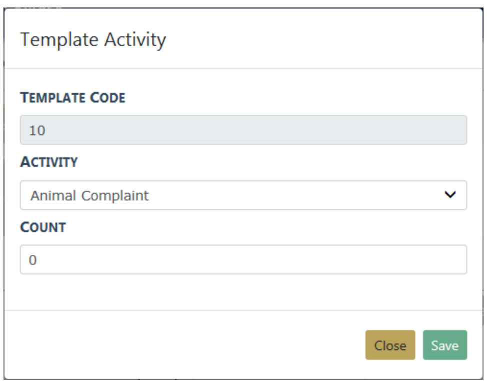
- Click **Go Back** to return to the *Agency Settings* page.

Activity Templates

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



- 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.



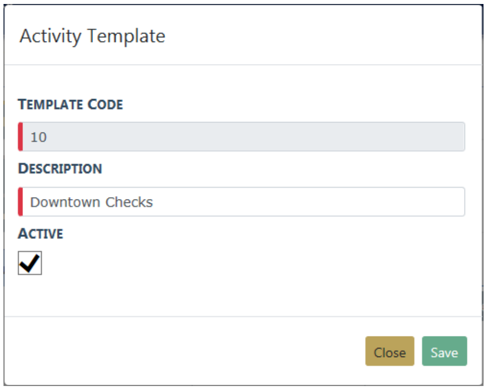
  – Click in the **Activity Code** field to open a selection list of activity codes.

  – 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.

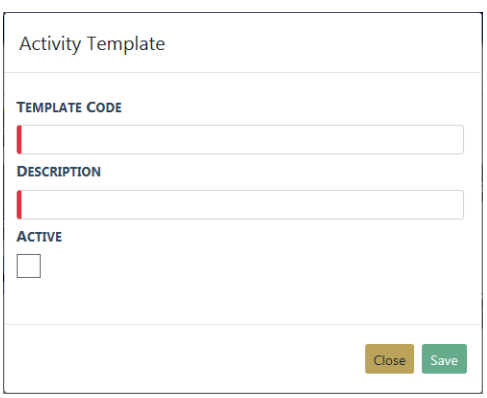
– Check the **Active** box to activate the code. (If a code is active, *Yes* displays in the **Active** column to the right of that code listing on the *Activity Templates* page, if not, *No* displays.)

– 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.

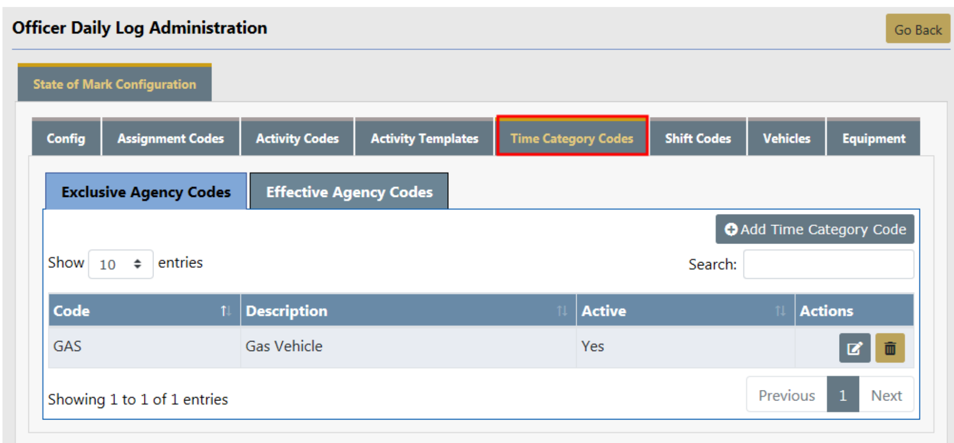
– Check the **Active** box to activate the code. (If a code is active, *Yes* displays in the **Active** column to the right of that code listing on the *Activity Templates* page, if not, *No* displays.)

– Click **Save** to add the template code and close the window; click **Close** to cancel and close the window.

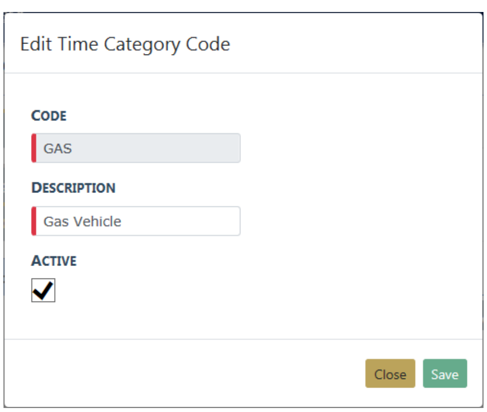
- Click **Go Back** to return to the *Agency Settings* page.

Time Categories

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



- 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.



– Change field content as needed.

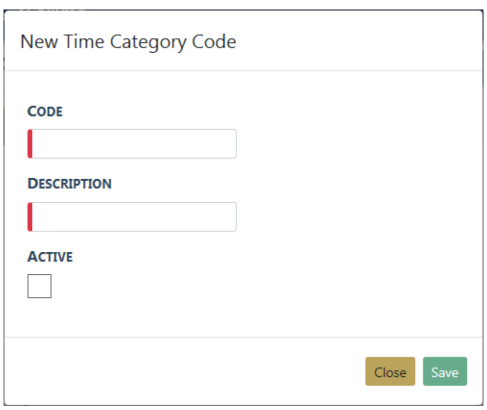
- Check the **Active** box to activate the code. (If a code is active, *Yes* displays in the **Active** column to the right of that code listing on the *Time Category Codes* page, if not, *No* displays.)

- 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.



  - 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.

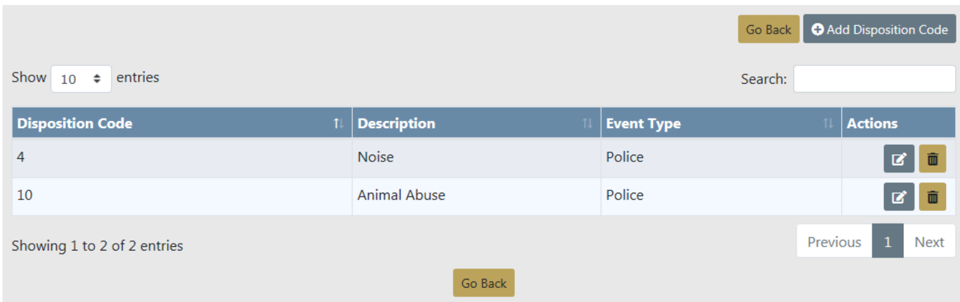
- Click **Go Back** to return to the *Agency Settings* page.

Calls for Service Tables

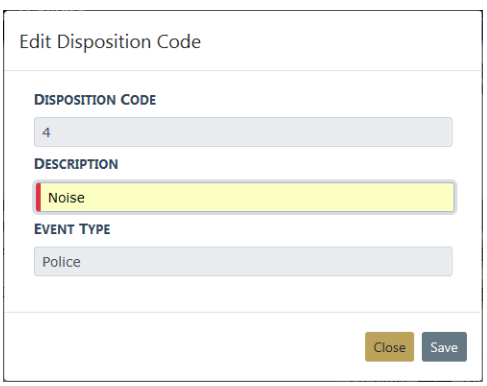
The **Calls for Service Tables** panel contains three links, each of which is described below.

Disposition Codes

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



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



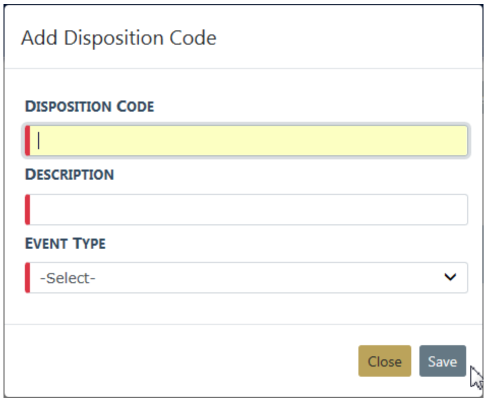
  – Change field content as needed.

  – Click **Save** to update the call disposition code and close the window; click **Close** to cancel changes and close the window.

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

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

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



– Complete the **Disposition Code** and **Description** fields.

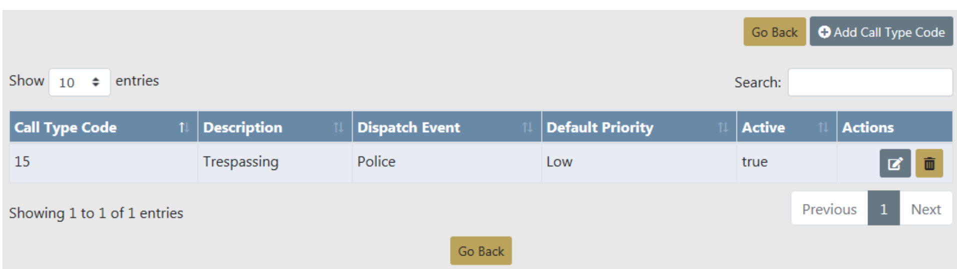
– Select an **Event Type** from the drop-down list.

– Click **Save** to add the call disposition code and close the window; click **Close** to cancel and close the window.

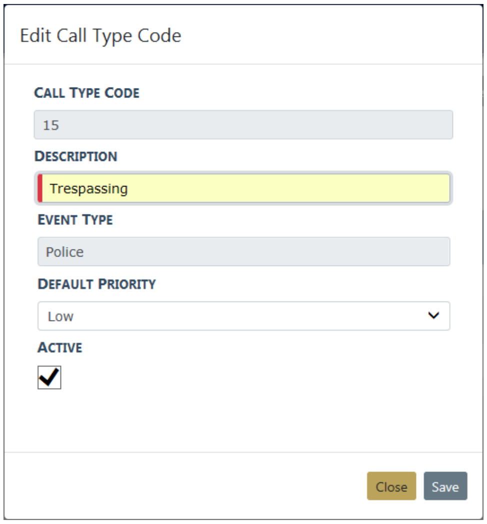
- Click **Go Back** to close the *Activity Codes* page and return to the *Agency Settings* page.

<u>Call Type Codes</u>

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



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



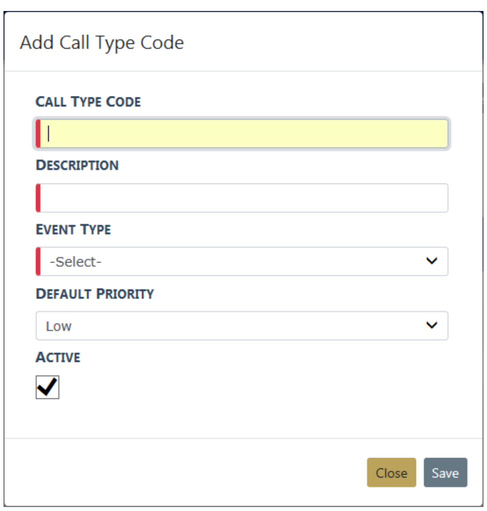
– Change field content as needed.

– 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.

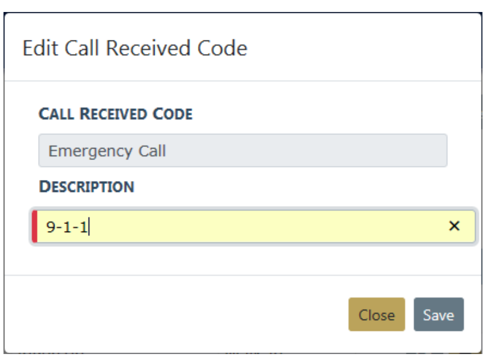
- Select the appropriate **Event Type** from the drop down list.
- Select the appropriate **Default Priority** from the drop down list.
- Check the **Active** box to activate the code. (If a code is active, *true* displays in the **Active** column on the *Call Type Codes* page, if not, *false* displays.)
- 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.

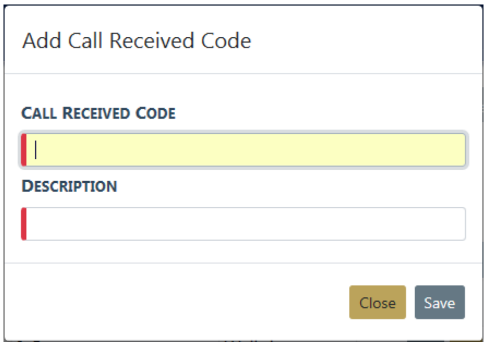
• Click  in the **Actions** column to open the *Edit Call Received Code* window as shown.



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

- Click in the **Actions** column to delete the record listed in the same line. A system message, *Call Received Code Removed Successfully*, confirms the deletion of the code.

- Click the Add Call Received Code link to open the **Add Call Received Code** window to add a call received code.



  – 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.

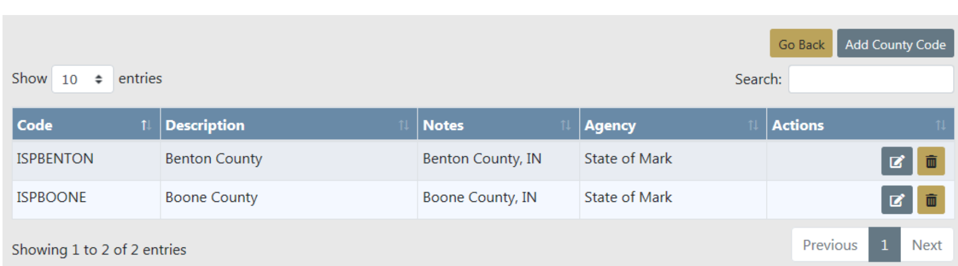
- Click **Go Back** to close the *Call Received Codes* page and return to the *Agency Settings* page.

County and Township Tables

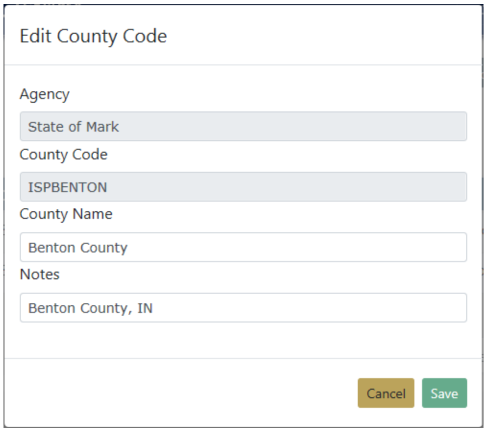
This panel contains two links, each of which is described below.

County Codes

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



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

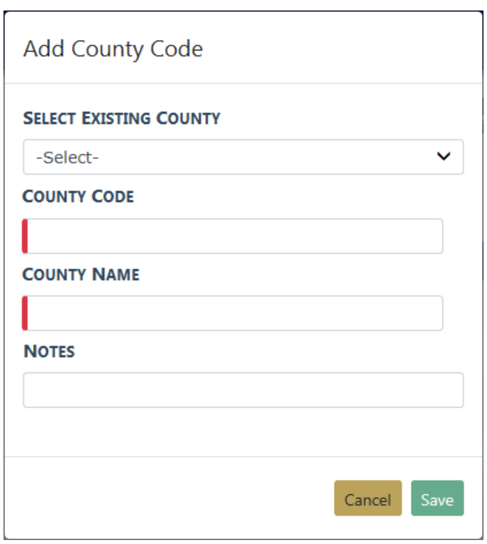


  – Change field content as needed.

  – 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.



  – Select **Existing County** from the drop-down selection list.

  – Complete the **County Code** and **County Name** fields

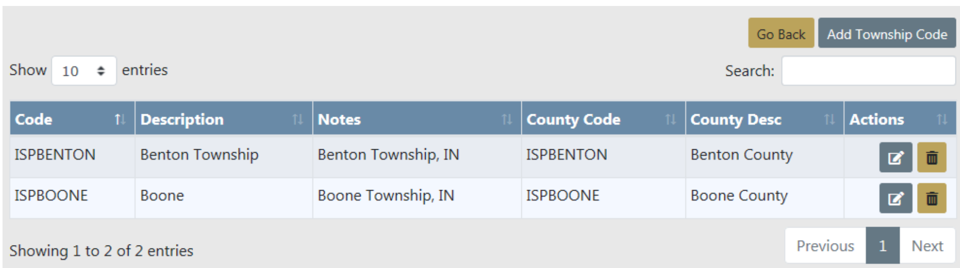
  – Enter notes in the **Notes** field, if needed.

   – Click **Save** to add the county code and close the window; click **Cancel** to cancel and close the window.

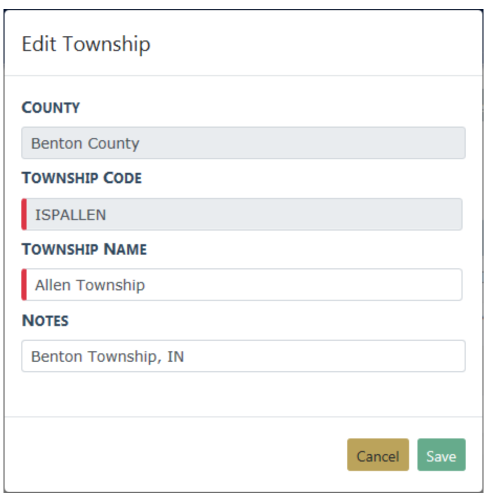
- Click **Go Back** to close the *County Codes* page and return to the *Agency Settings* page.

Township Codes

The Township Codes link opens the Township Codes page.



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

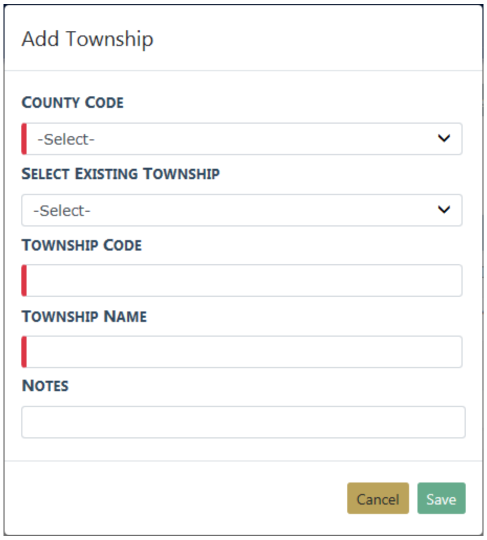


   – Change field content as needed.

   – 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.

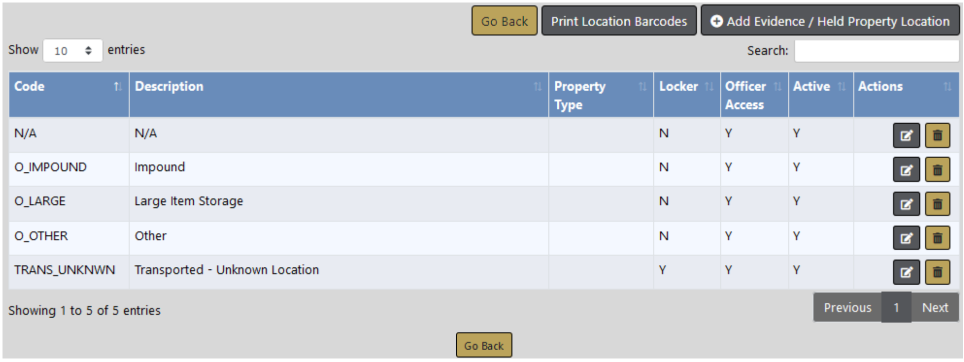
- Click **Go Back** to close the *Township Codes* page and return to the *Agency Settings* page.

Other Tables

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

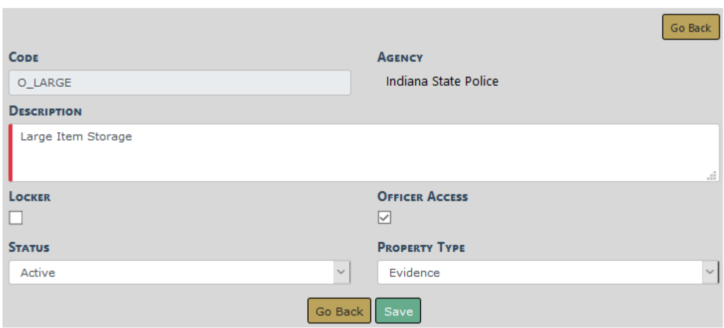
Evidence / Held Property Locations

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



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.



  – Change field content as needed.

  – If needed, check the **Locker** box to indicate that the evidence location is a locker or click to remove the check if the location is not a locker. (If **Locker** is checked, *Y* displays under the **Locker** column for the location on the *Evidence / Held Property Locations* page.)

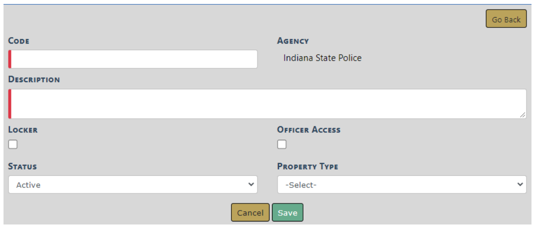
  – Uncheck the **Officer Access** box to prevent access.

  – Select **Active** or **Inactive** from the **Status** field drop-down selection list to indicate whether or not the location is active. (If the location status is active, *Y* displays in the **Active** column on the *Evidence Locations* page, if not, *N* displays.)

  – Click **Save** to save changes to the record and return to the *Evidence / Held Property Locations* page.

- Click in the **Actions** column to delete the record listed in the same line. The message, "Are you sure you want to delete this Property Location?' displays. Click **Yes** to confirm deletion or click **No** to keep the record.

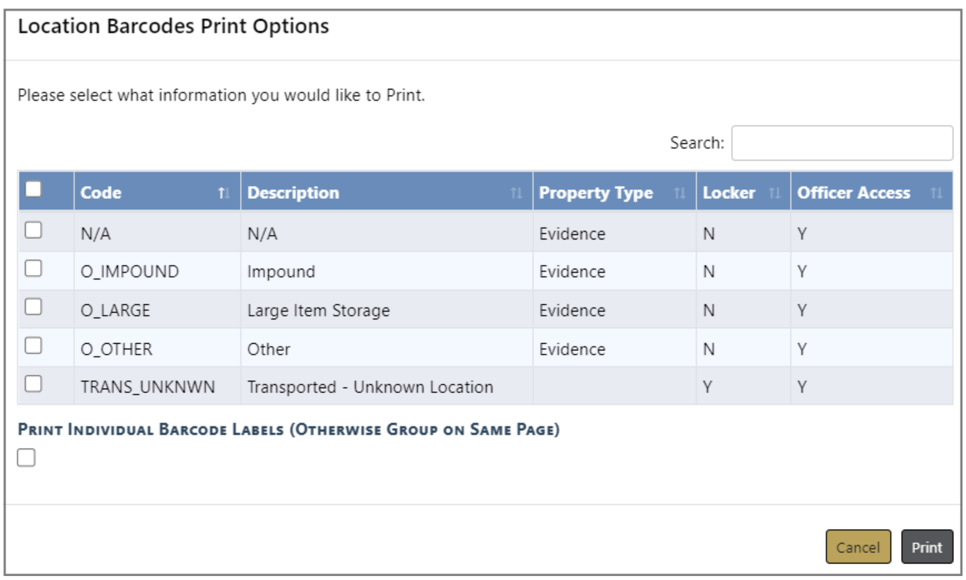
- Click the **Add Evidence/Held Property Locations** button to open the *Add Evidence - Held Property Location* window to add another location record.



  – Complete the fields appropriately.

  – Click **Save** to return to the *Evidence Locations* page where the new evidence location is now listed.

- Click the **Print Location Barcodes** button to print location barcode labels.



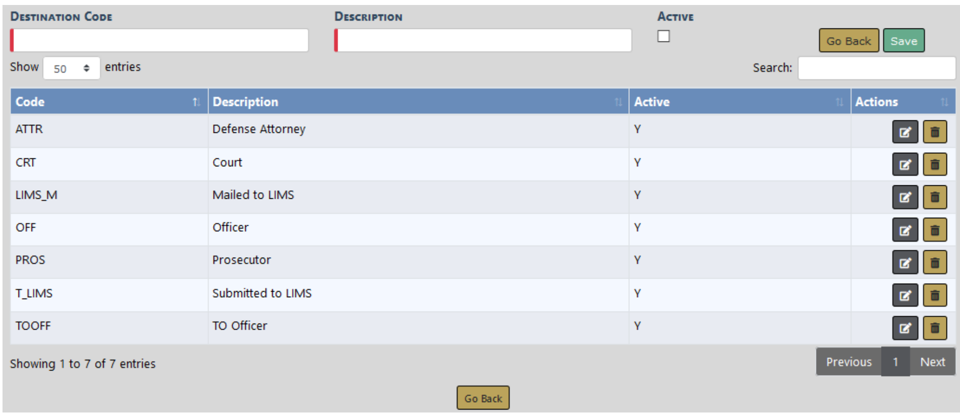
  – Select the items for which you want to print barcodes. Prints on letter sized paper, 20 labels per page.

  – Check the **Print Individual Barcode Labels** box if you wish to print one barcode label per page.

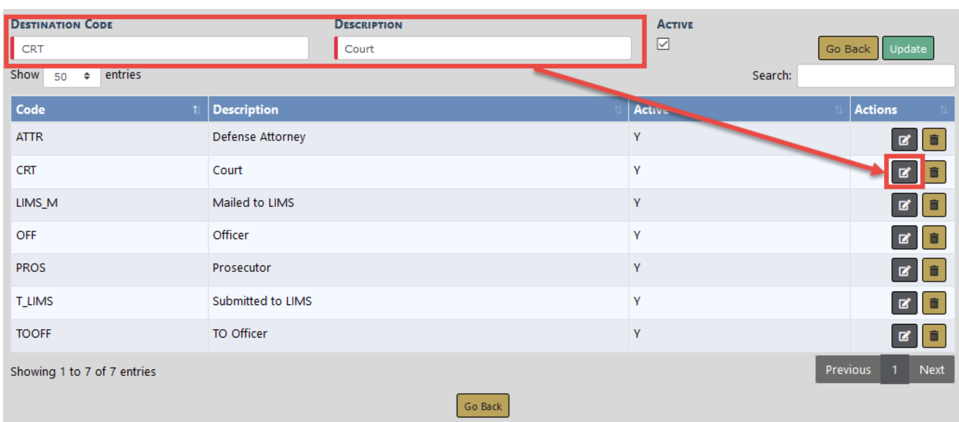
  – Click **Print**.

Evidence / Held Property Destinations

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



- 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:



  – Change the content in the **Destination Code** and the **Description** fields as needed.

  – Check the **Active** box to activate the code. (If a code is active [**Active** check box checked], *Y* displays in the **Active** column on the *Evidence - Held Property Destination* page, if not, *N* displays.)

  – Click **Update** to update the evidence- held property destination record and close the window; click **Cancel** to cancel changes and close the window.

- Click in the **Actions** column to delete the record listed in the same line. The message, "Are you sure you want to delete?",displays. Click **Yes** to confirm deletion or click **No** to keep the record.

- To add another evidence destination, use the three fields near the bottom of the page as follows:

  – Click in the **Destination Code** field and type in a code for the evidence - held property destination.

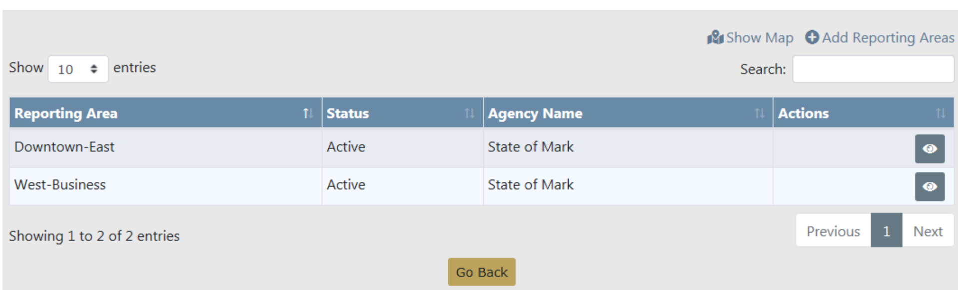
  – Click in the **Description** field and type in a brief description of the evidence - held property destination.

  – Check the **Active** box to activate the code. (If the **Active** check box is checked, *Y* displays in the **Active** column on the *Evidence - Held Property Destination* page, if not, *N* displays.)

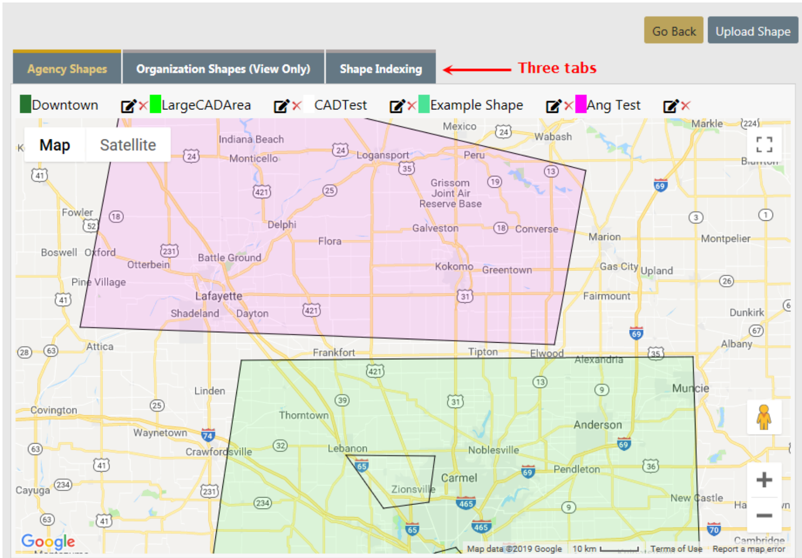
  – Click **Save** to save the new destination code or click **Go Back** to clear the fields and return to the *Agency Settings* page.

Reporting Areas

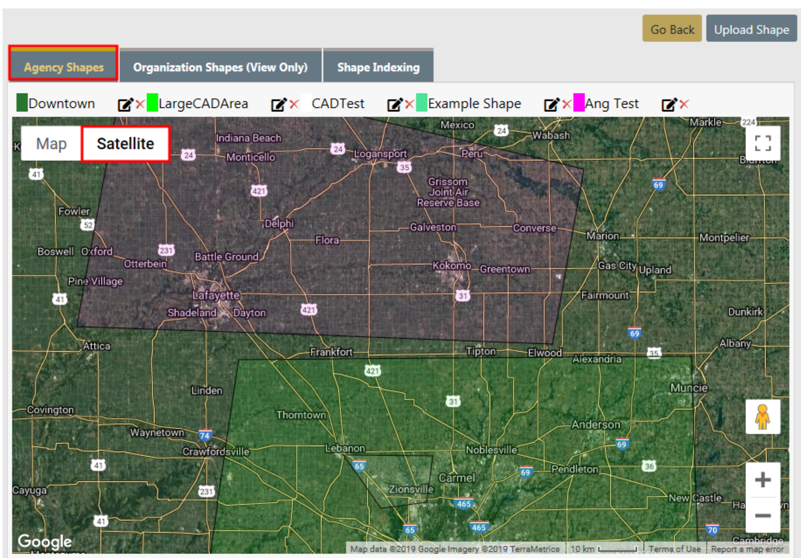
The Reporting Areas link opens the *Reporting Areas* page.



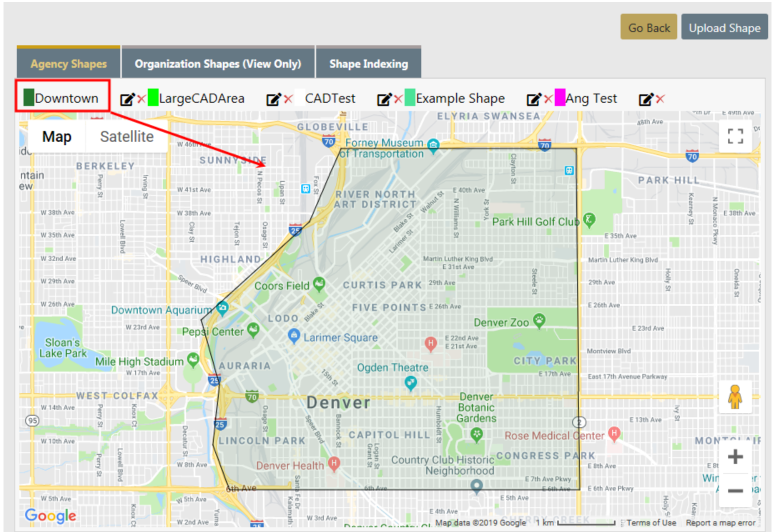
- Click the Show Map link to open the *Mapping Shapes* map as shown in the following example.



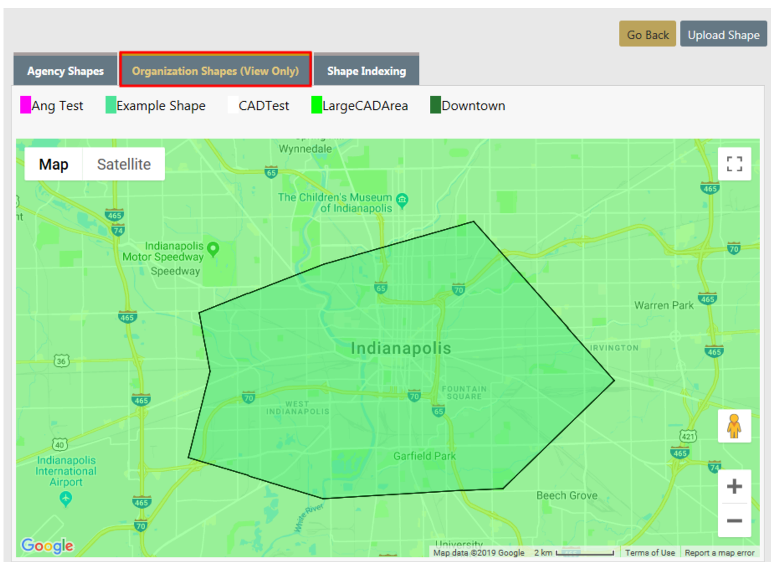
– Click **Satellite** in the upper left corner to change the display as shown in the following example.



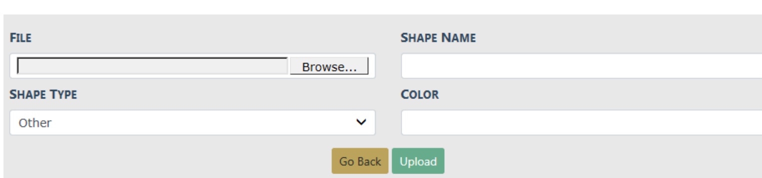
– Click on the different areas to view that area on the map.



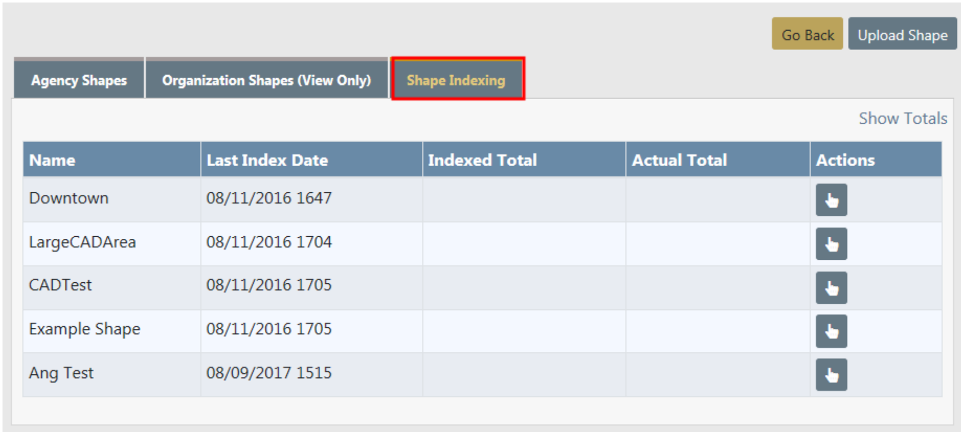
– Click on the **Organization Shapes (View Only)** tab to view for the organization only.



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



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



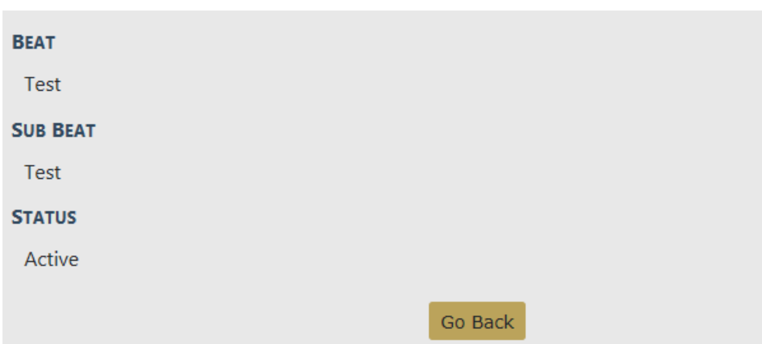
Click on the select icon to index a shape.

– 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.

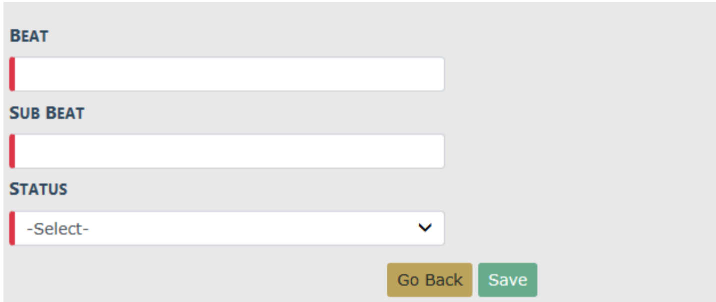
- Click in the **Actions** column to the far right of the listing to open the *View Reporting Areas* page.



– 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.

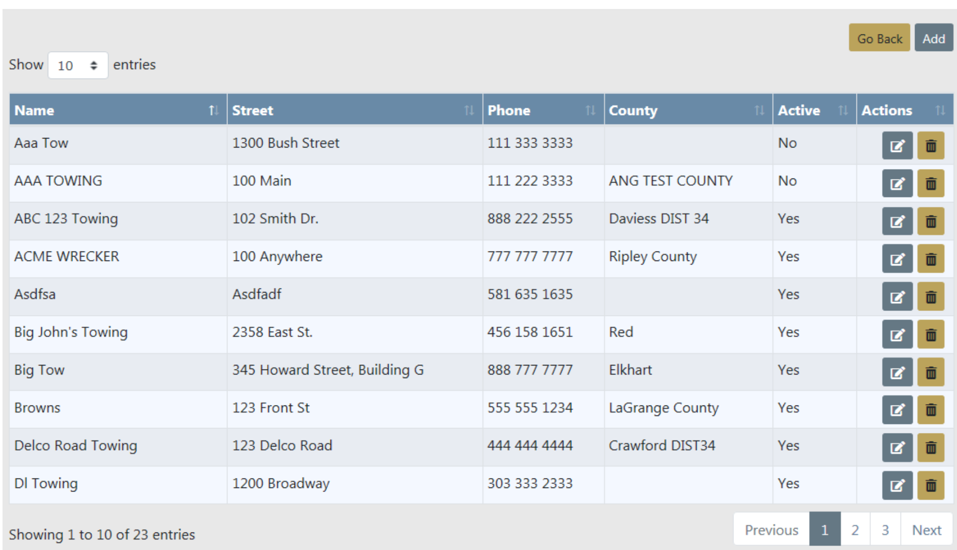


- Complete the fields appropriately.
- Click **Save** to save the new record and return to the *Reporting Areas* page where the new reporting area is listed.
- Click **Go Back** to close the *Add Reporting Areas* window without saving and return to the *Reporting Areas* page.

• On the *Reporting Areas* page, click **Go Back** to return to the *Agency Settings* page.

Towing Companies

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



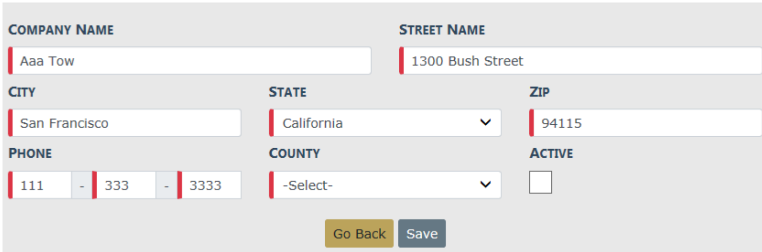
Go Back Add

Show 10 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	
Dl Towing	1200 Broadway	303 333 2333		Yes	

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

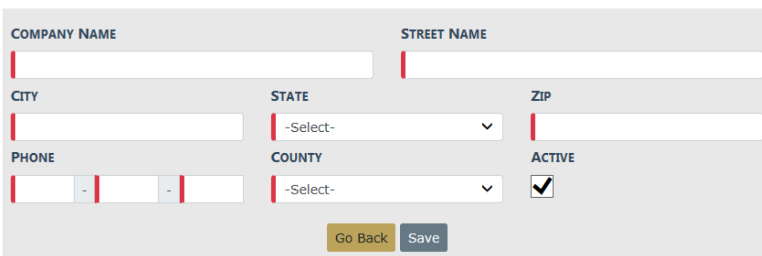
• Click  in the **Actions** column to the far right of the listing to open the *Edit Towing Company* page.



- Change field content as needed.
- Click **Save** to save changes to the record and return to the *Towing Companies* page.

• Click  in the **Actions** column to delete the record listed in the same line. The message, "Are you sure?" displays. Click **Yes** to confirm deletion or click **No** to keep the record.

• Click **Add** in the upper right corner to open the *Add Towing Company* page as shown.

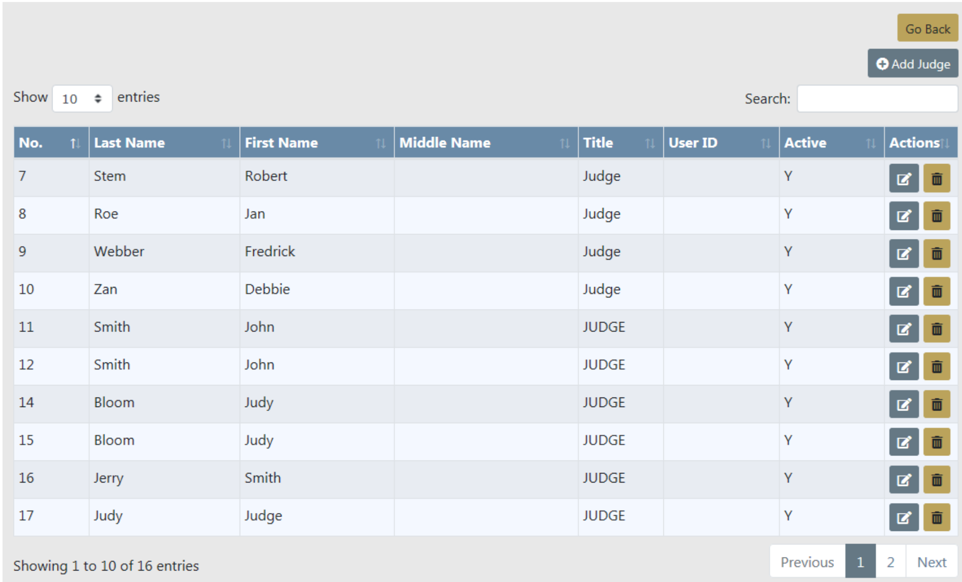


- Complete the fields appropriately.
- Click **Save** to save the new record and return to the *Towing Companies* page where the new towing company is listed.
- Click **Go Back** to close the *Add Towing Company* page without saving and return to the *Towing Companies* page.

• Click **Go Back** to return to the *Agency Settings* page.

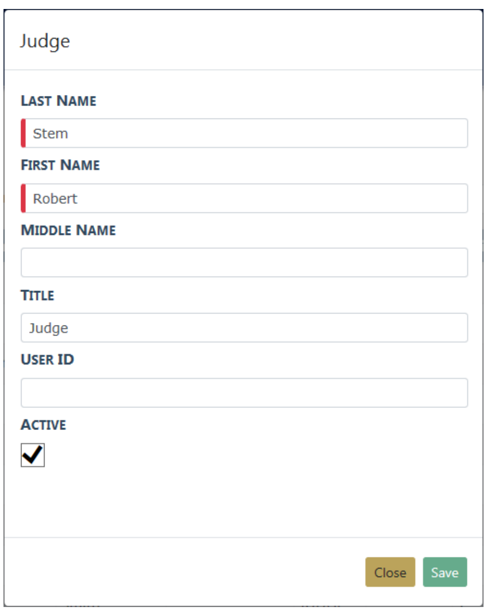
Judges

The Judges link opens the *Judges* page.



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	

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

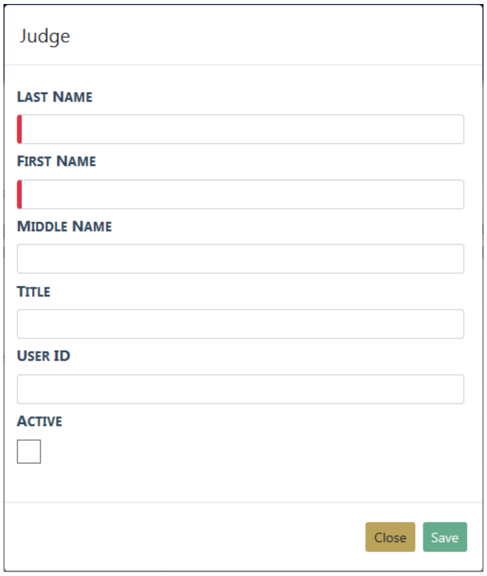


  – Change field content as needed.

  – 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.

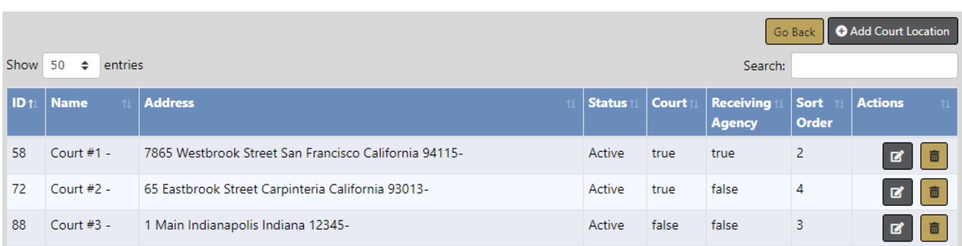


- – Complete the fields appropriately.
- – Click **Save** to save the new record and return to the *Judges* page, or click **Close** to return to the *Judges* listing without saving the new record.

- Click **Go Back** to return to the *Agency Settings* page.

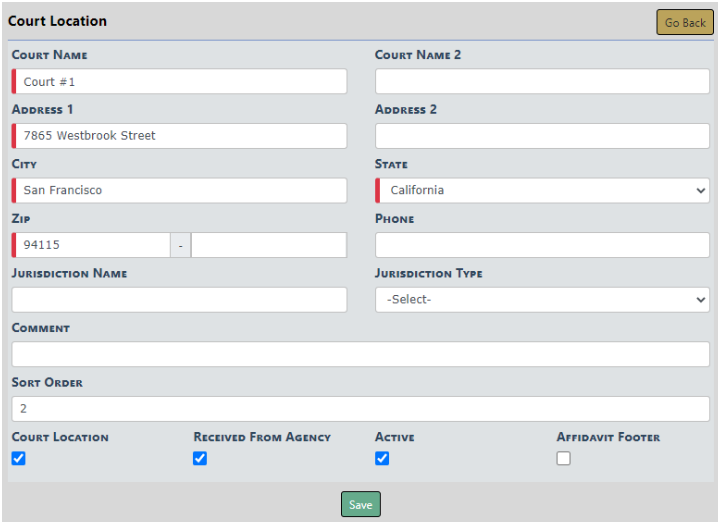
Court Locations

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



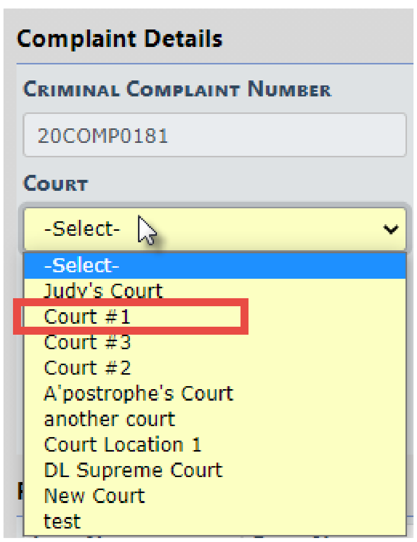
ID	Name	Address	Status	Court	Receiving Agency	Sort Order	Actions
58	Court #1 -	7865 Westbrook Street San Francisco California 94115-	Active	true	true	2	
72	Court #2 -	65 Eastbrook Street Carpinteria California 93013-	Active	true	false	4	
88	Court #3 -	1 Main Indianapolis Indiana 12345-	Active	false	false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

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



– Change field content as needed.

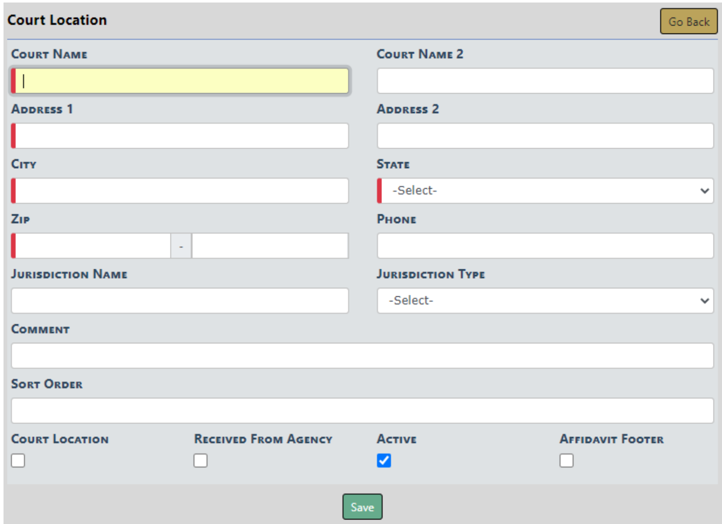
– The **Sort Order** is where this record falls in the Court *List Of Values*. In this example, Court #1 appears as the second option on the list.



– Click **Save** to save changes to the record and return to the *Court Locations* page.

- Click in the **Actions** column to delete the record listed in the same line. The message, "Are you sure?" displays. Click **Yes** to confirm deletion or click **No** to keep the record.

- Click **Add Court Location** in the upper right corner to open the *Court Location* page as shown.



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

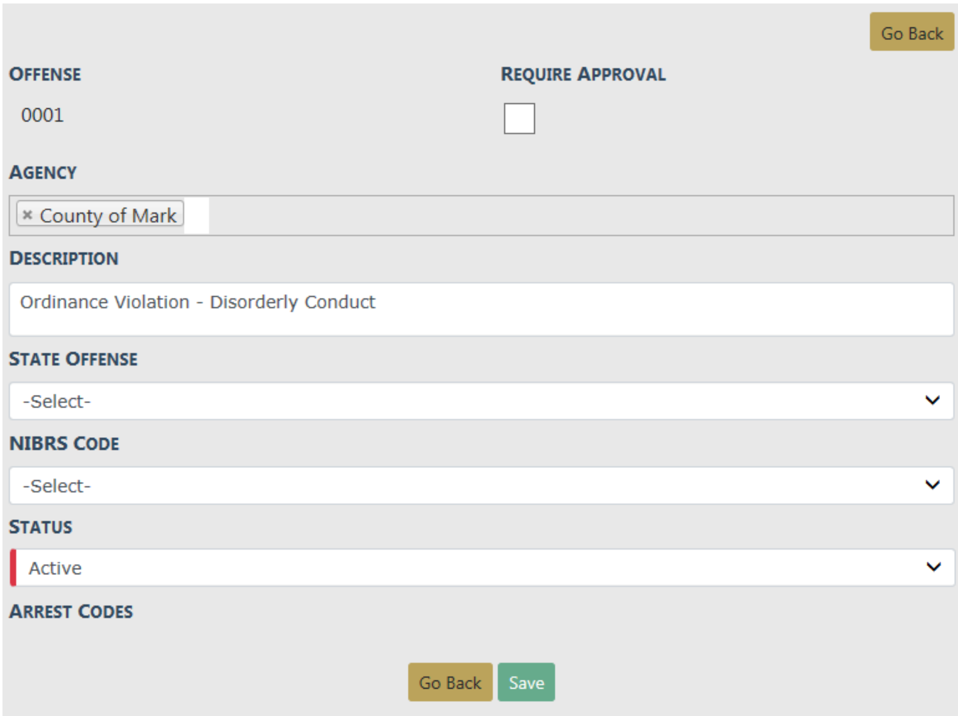
• Click **Go Back** to return to the *Agency Settings* page.

Offense Codes

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

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

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



  – Ensure that the button to the left of the **Require Approval** label is checked, if all incident reports with this offense must be approved.

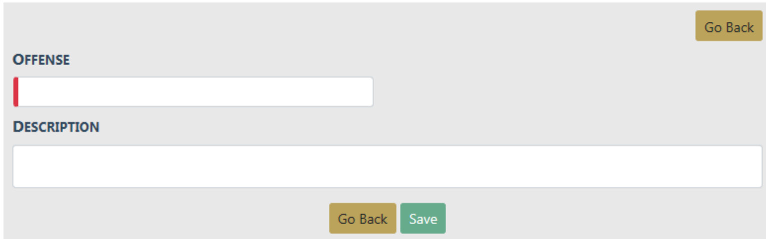
  – Change content in all fields as needed.

  – 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.

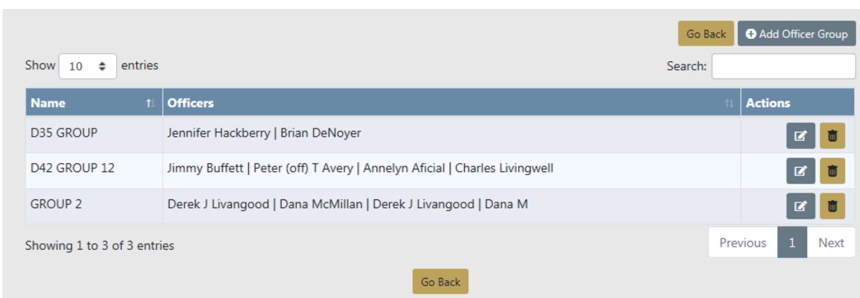


- Complete the fields appropriately.
- Click **Save** to save the new record and return to the *Local Offense Codes* page where the new reporting area is listed.
- Click **Go Back** to close the *Add Local Offense Code* page without saving and return to the *Local Offense Codes* page.

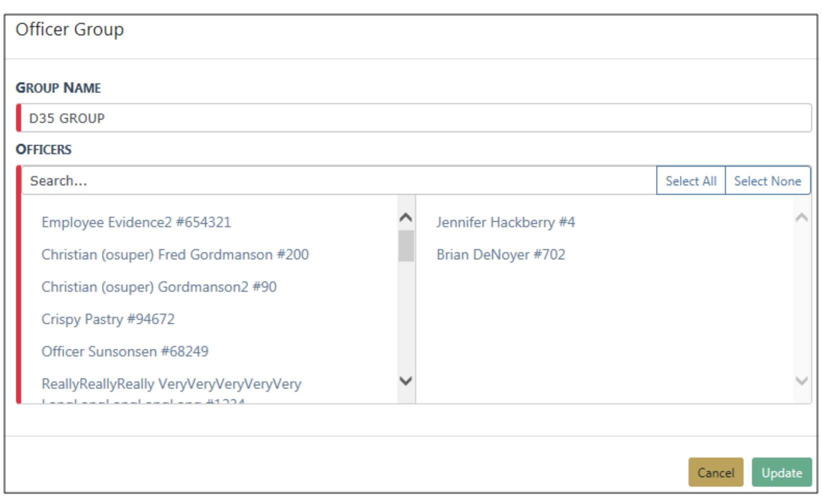
- Click **Go Back** to return to the *Agency Settings* page.

Case Officer Groups

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



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

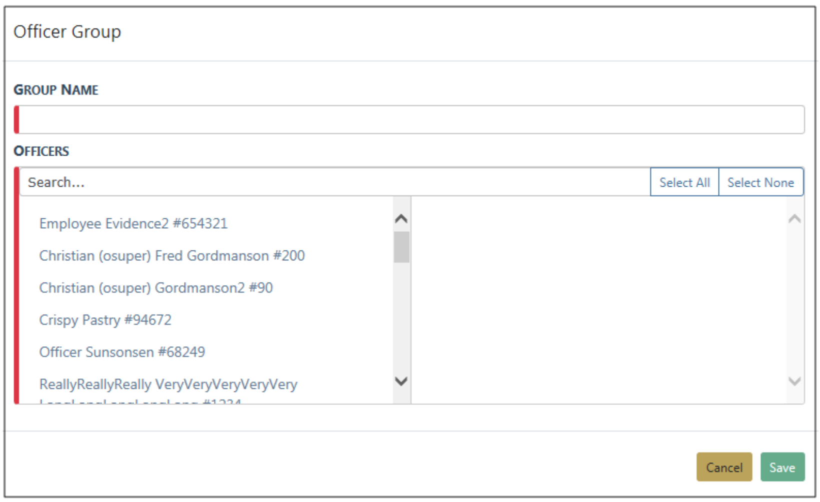


– Click an officer in the left window to move it to the right window. Officers that appear in the right window are included in the group. Click the **Select All** button to include all officers that appear in the left window. Click the **Select None** button to remove all officers from the group.

– 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.

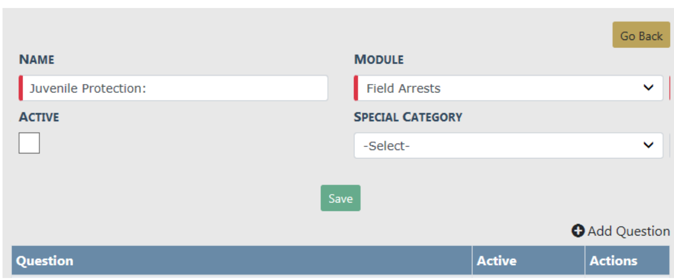
Screening Questions

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.

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.

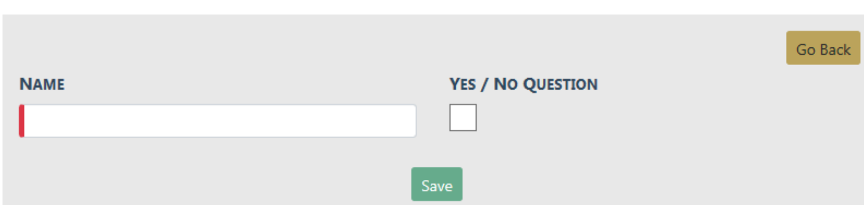


  – Enter a **Name** for the question set, select values for the **Module** and **Special Category**.

  – 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.

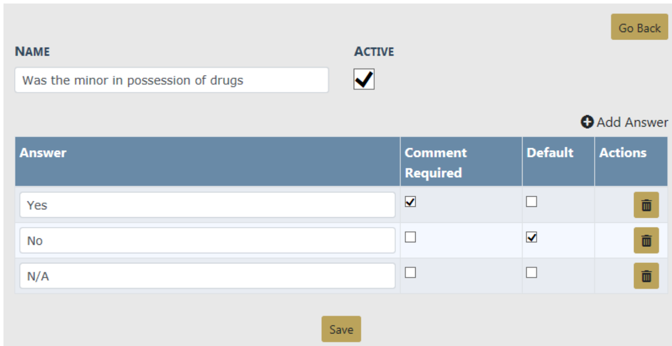
- Once you have created a new question set, click the Add Question link on the bottom right of the page to open the *Screening Questions* page to enter more questions related to the question set.



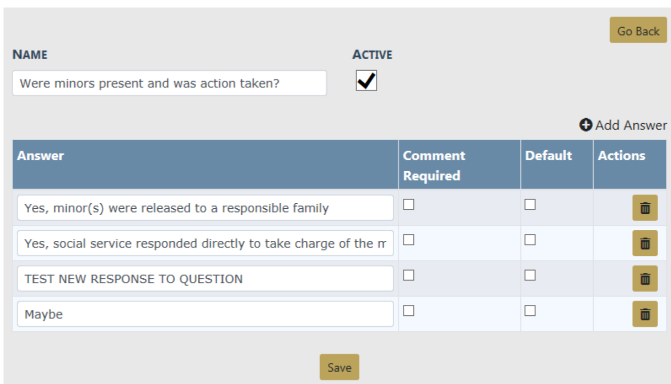
  – Enter the question in the **Name** field.

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

If a Yes/No Question



If not a Yes/No Question



– Check the **Active** box to make it active, or leave the box blank to make it inactive.

– Select appropriate values based on the question type.

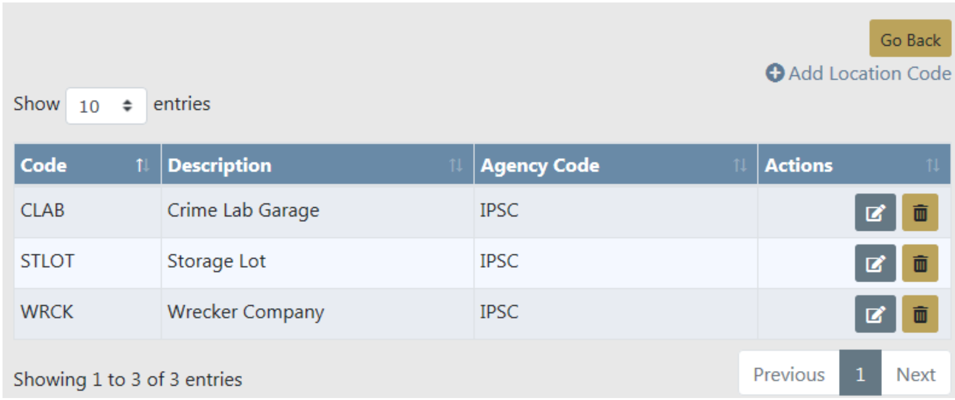
– Click the Add Answer link on the upper right of the window to add additional answers if needed, click **Save**, then click the **Go Back** button to return to the previous page.

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

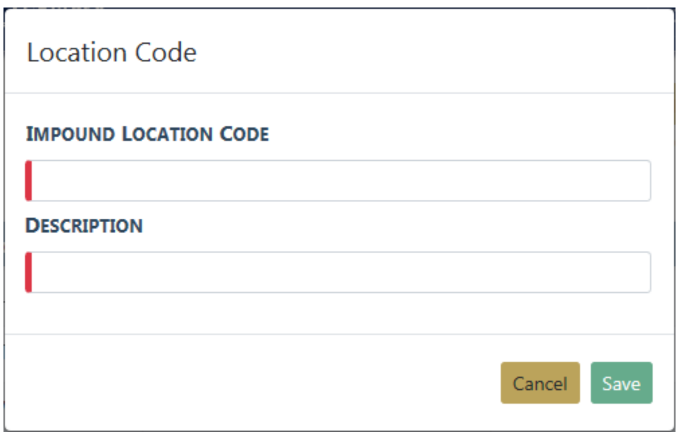
Note: If there are no answers tied to a question, the **Active** checkbox on the Question automatically is unchecked and disabled until at least one answer is added.

Vehicle Location Codes

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



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



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

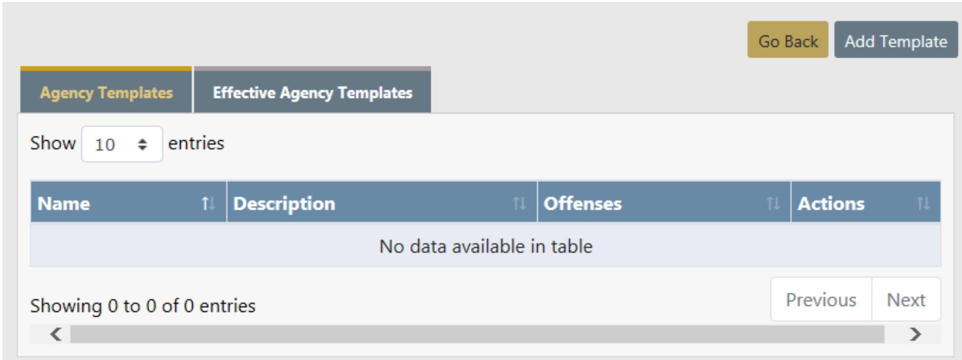
Add as many location codes as needed. The following page example shows four location codes.

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

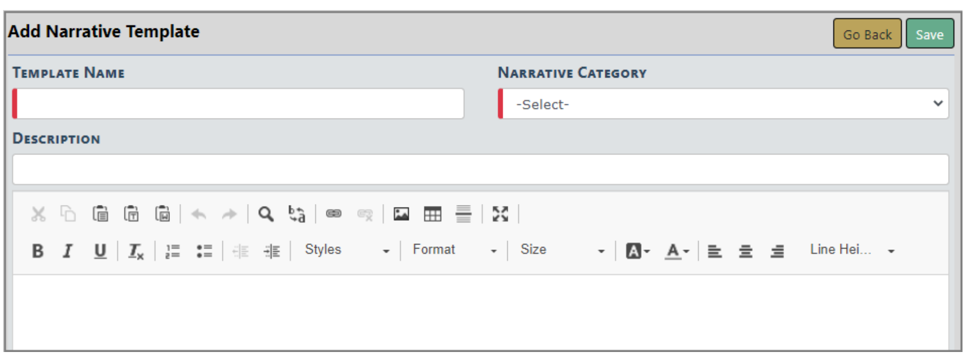
To delete a code click in the **Actions** column to the far right of the code listing to open the message, *Vehicle Impound Code Deleted Successfully*. Click **Yes** to return to the page where the deleted code is no longer listed.

Narrative Templates

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



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

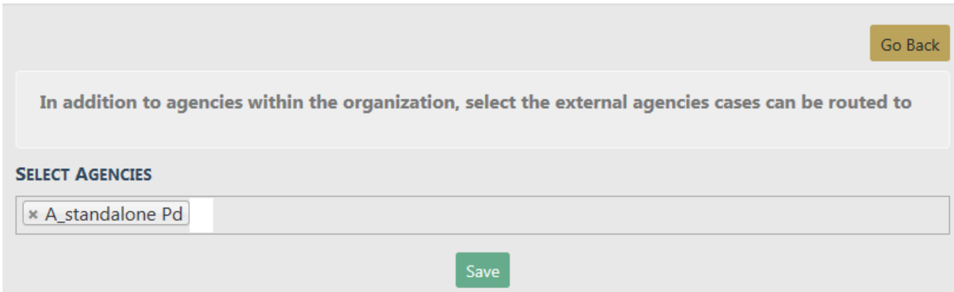


  - Complete the fields at the top of the page appropriately.
  - Type the content of the template in the large pane, using the tool bar at the top of the pane to format the text as needed.
  - Click **Save** to save the new template as often as needed.
  - Click **Go Back** to close the *Add Narrative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

Case Routing

Administrators with appropriate permissions can route cases to external agencies.

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

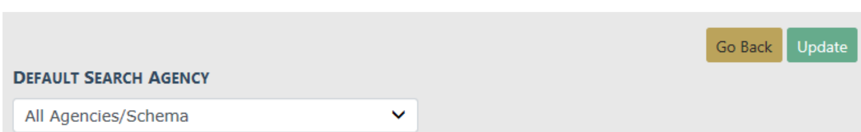


- To *select* an available agency, click in the **Select Agencies** box then select one or more agencies from the list that appears.
  - To *deselect* an agency, click on the X to the left of the agency name to remove it from the **Select Agencies** box.
- Click **Save**. A successful message appears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

Search Options

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

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



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

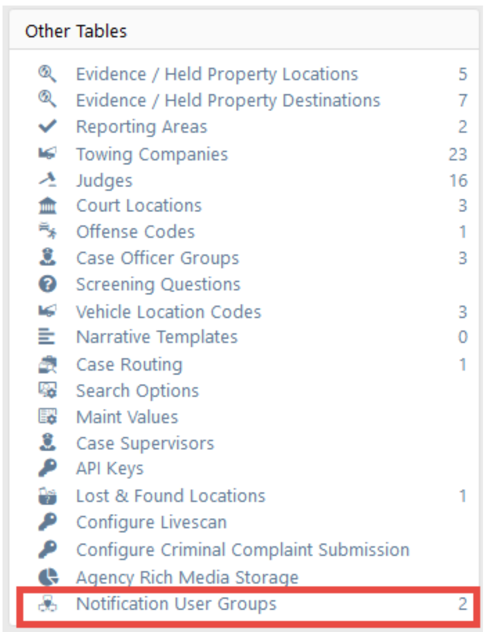
Maint Values

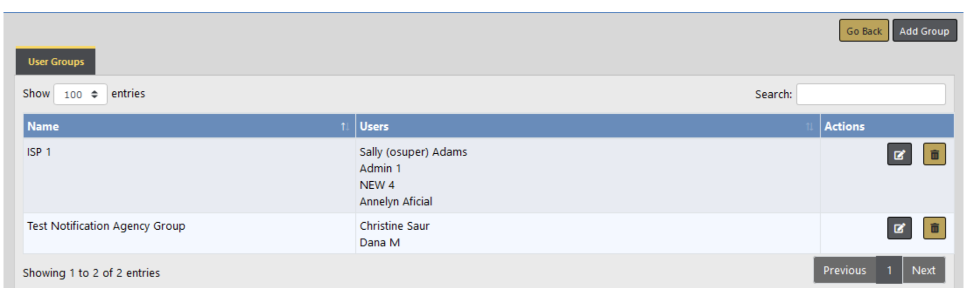
Maintenance Values provides administrators with proper permissions the ability to configure module behavior and restrictions for the agency.

For details, refer to “Maintenance Values” on page 343.

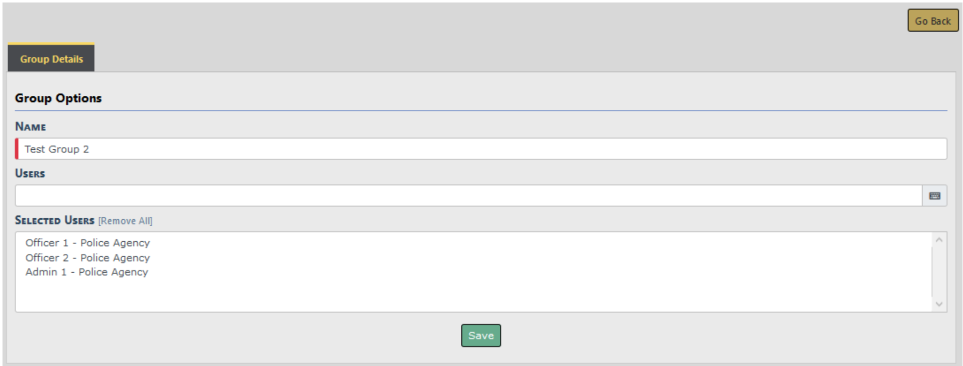
Notification User Groups

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.



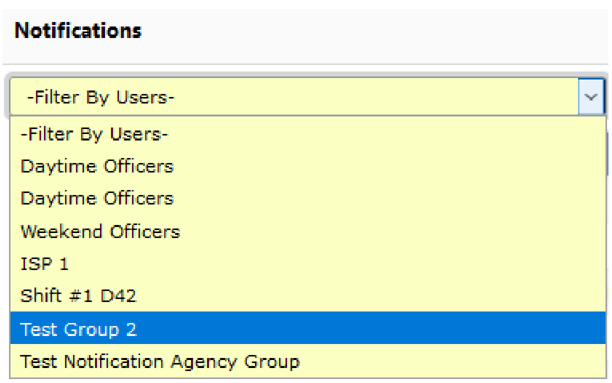


Click the **Add Group** button to add a new group.



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

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

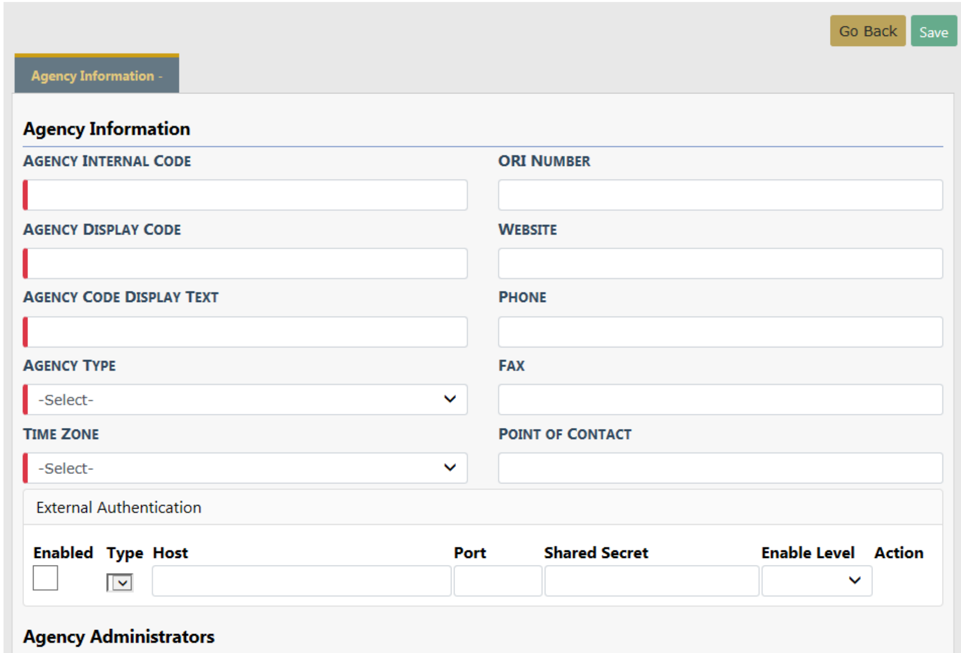


Add Agency

Use the following procedure to add an agency record.

1. On the *Administrative Home* page, click the **Agencies** icon to display the *Manage Agencies* page.
2. Choose one of the following options to add an agency:

   a. Click Add Agency link in the upper right corner to display the *Agency Profile* page.



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

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

- "Agency Information Tab" on page 18 for information on the **Agency Information** tab.
- "Sub Agency Tab" on page 21 for information on the **Sub Agency** tab.
- "Agency Organization Tab" on page 22 for information on the **Agency Organization** tab.
- See "Number Generation Tab" on page 23 for information on the **Number Generation** tab.
- See "Quick Links Tab" on page 27 for information on the **Quick Links** tab.
- "Agency Settings" on page 29 for information on the **Agency Settings** tab.

b. Or, click the AgencySetup Wizard to guide you through the setup process. You can either manually enter data or upload setup data from an Excel spreadsheet using this method.

TO UPLOAD:

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

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

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

Click **Upload**.

TO MANUALLY ENTER DATA:

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

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

Click **Finish**.

Chapter 5. Roles

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

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

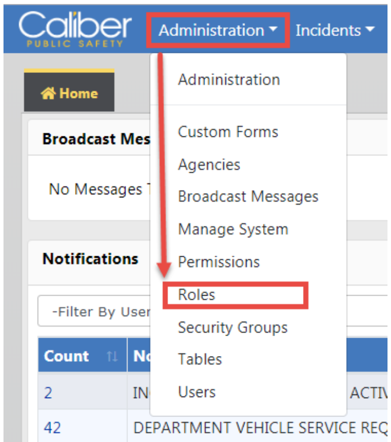
- A user must be assigned at least one role in order to perform tasks within the system.
- A user can be assigned more than one role.
- Two different roles may include one or more of the same permissions, but within a specific agency, each role is unique in its permissions make-up.
- Certain users may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

Access Roles Module

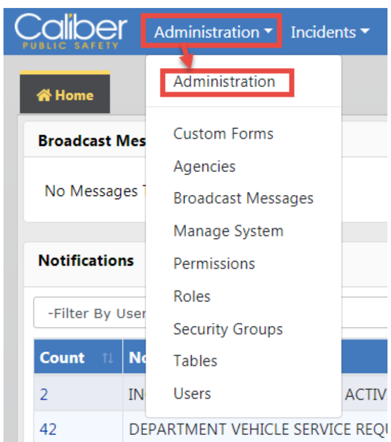
System roles used by an agency can be added and edited via the **Role**s module by certain users with administrative permissions.

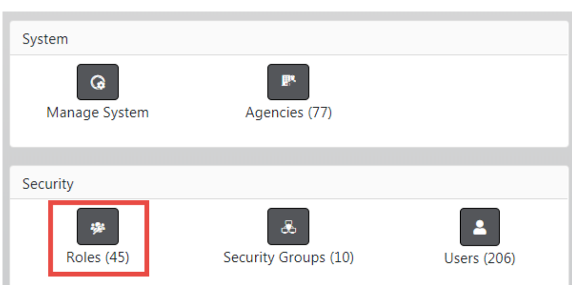
From the *Home* page access the Roles module one of two ways:

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

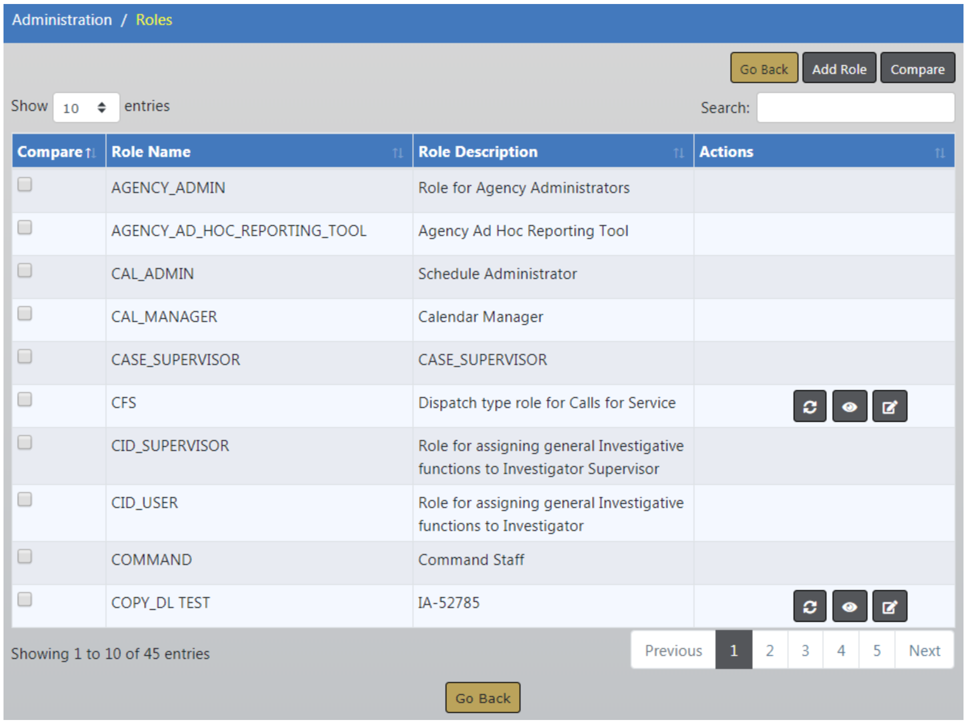


- Click on the Administration menu option, then click again on the Administration drop-down option to display the *Administrative Home* page. On the *Administrative Home* page, click the **Roles** icon located under the Security section.





The *Roles* page displays as shown.



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

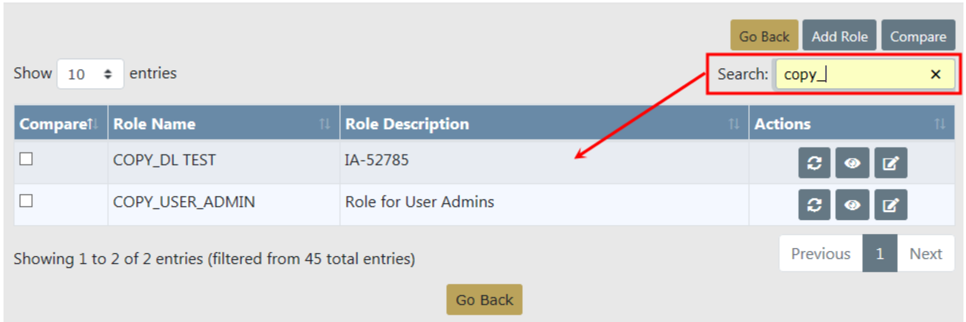
- "Edit Role" below.
- "Add Role" on page 81

Edit Role

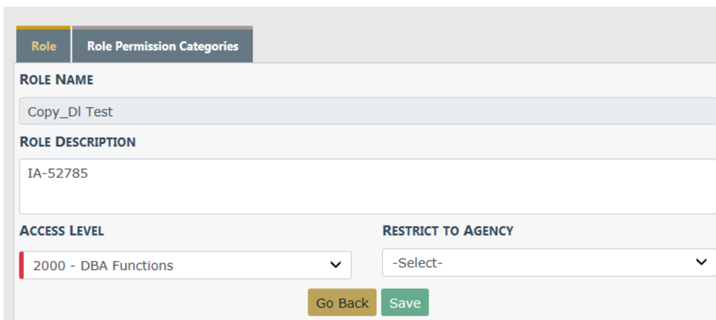
Use the following procedure to edit a role.

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

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



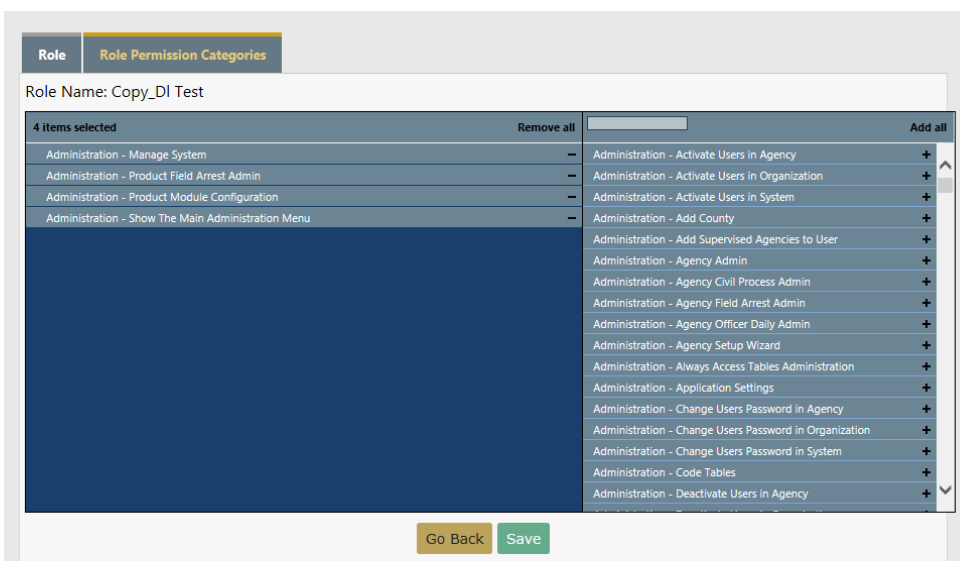
2. Click  in the **Actions** column to display the *Edit Role* page as shown in the example.



3. If needed, make changes to the **Role Description** and **Access Level** fields. (**Role Name** cannot be changed.)

4. Continue with Step 5 or go directly to Step 7, as appropriate.

5. Click **Role Permission Categories** tab to display the *Role Permission Categories* page as shown in the example.



6. Remove or add permissions to this role for your agency as follows:

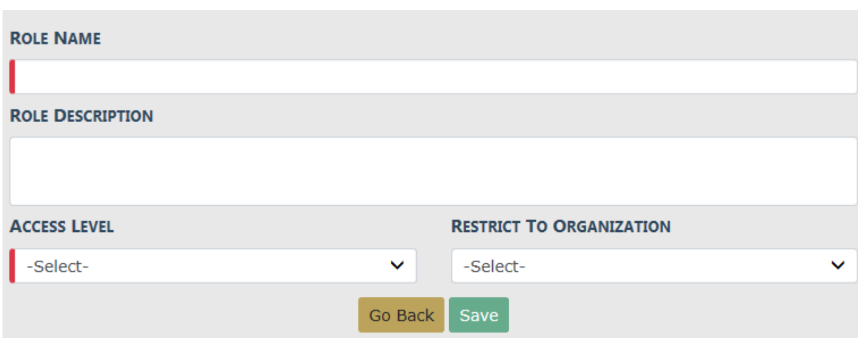
   - In the panel to the left, click (minus sign) to the far right in the same line to remove that permission.
   - In the panel to the right, click (plus sign) to the far right in the same line to add that permission.
   - Repeat as needed until you have removed or added permissions to tailor this role 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.

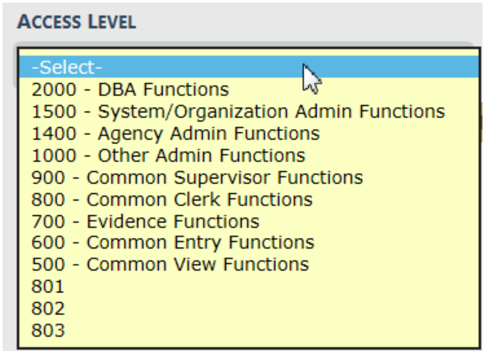
1. From the *Roles* page, click the Add Role button in the upper right corner to display the *Add Role* page as shown.



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.

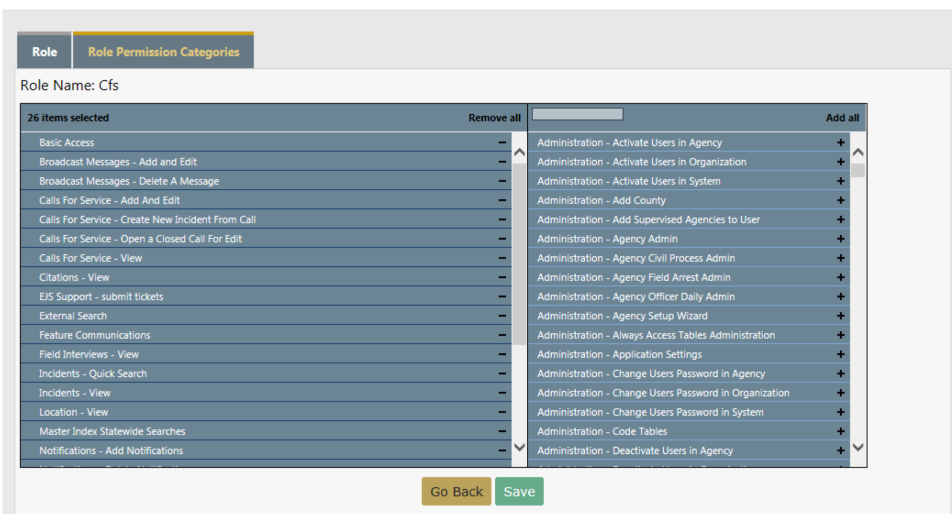


5. Select the appropriate level of access for this role.

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) in the left panel to the far right to remove that permission.

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

11. Review permissions and continue as follows:

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

12. Continue as follows:

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

Copy Role

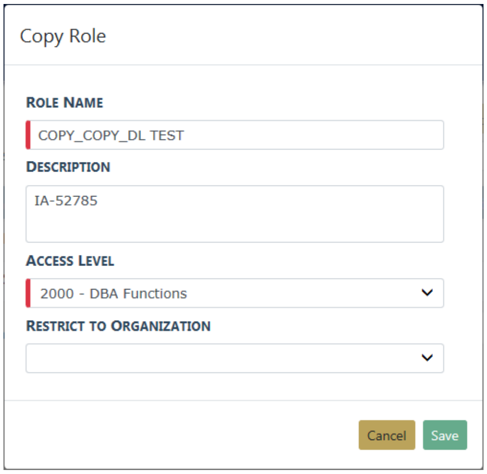
To save time setting up a new role, you have the ability to copy one role to another role if they have similar traits. During the copy process, you can update the new role as needed.

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

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

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

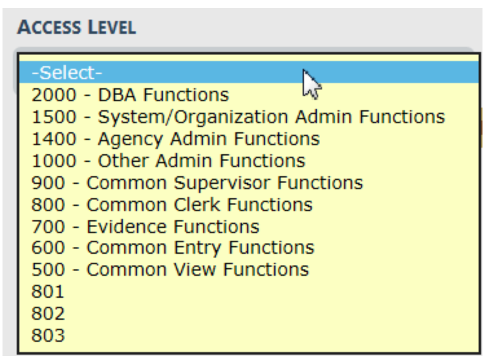
Compare	Role Name	Role Description	Actions
☐	COPY_DL TEST	IA-52785	



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.

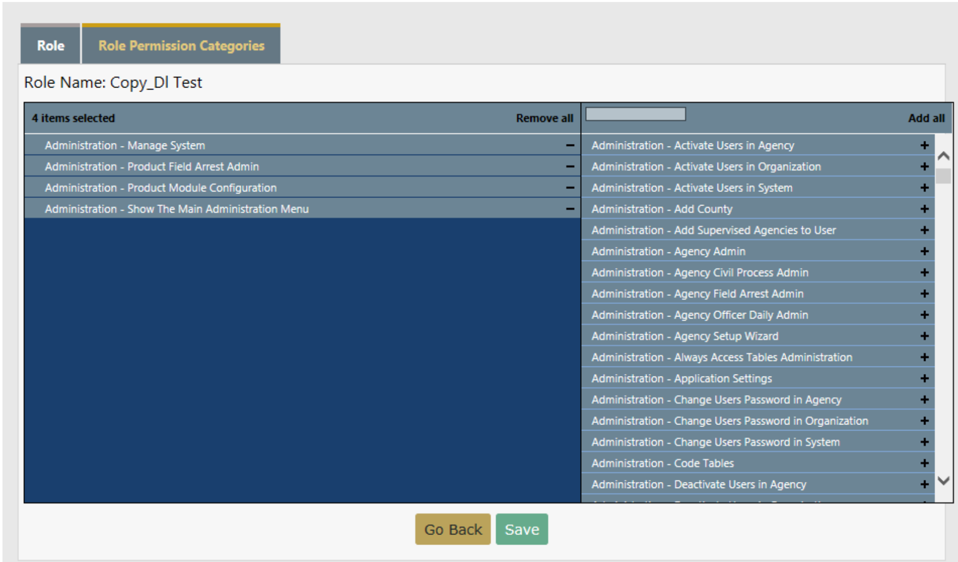


5. Select the appropriate level of access for this role.

6. If applicable, click to the far right in the **Restrict to Organization** field to display a list of selections, and select the appropriate option.

7. Click **Save** to save this record and display the system message, *Role details added successfully.*

8. Click **Role Permission Categories** tab to display the *Role Permission Categories* page as shown in the example.



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

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

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

11. Review permissions and continue as follows:

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

12. Continue as follows:

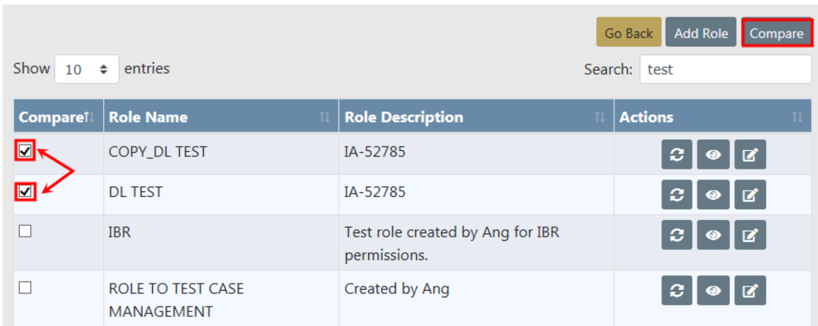
- If needed, make changes and click **Save** to return to the *Roles* page.
- If changes are not needed, click **Go Back** to return to the *Roles* page.

Compare Role

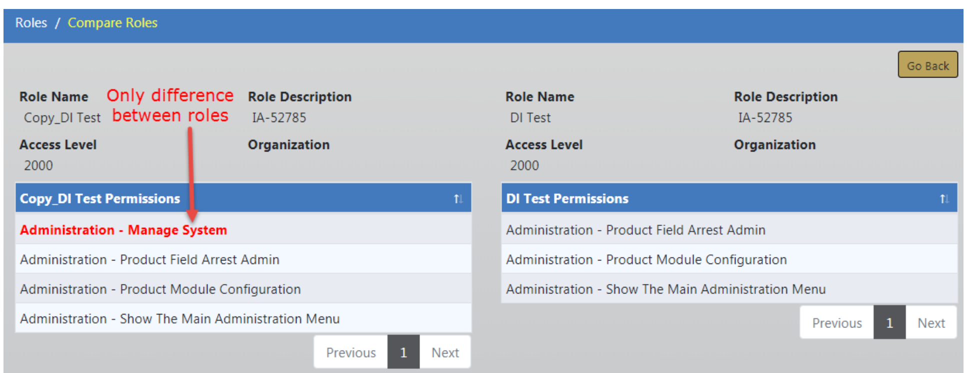
Compare two or more roles to understand permission differences between them, and to identify potential duplicates.

Use the following procedure to compare roles for your agency.

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



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



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

Chapter 6. Security Groups

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

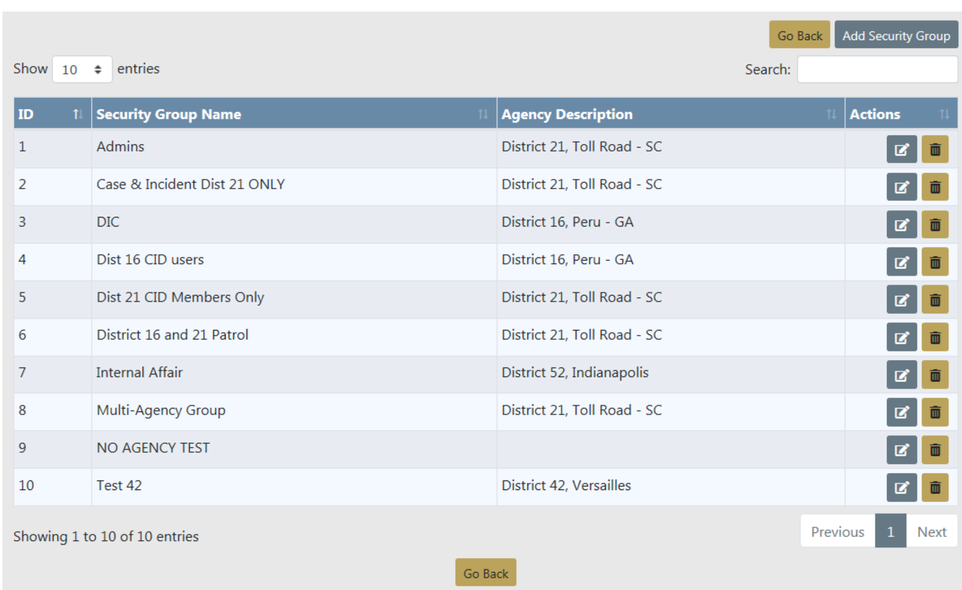
Access Security Groups Module

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

From the *Home* page,

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

The *Security Groups* page displays as shown.



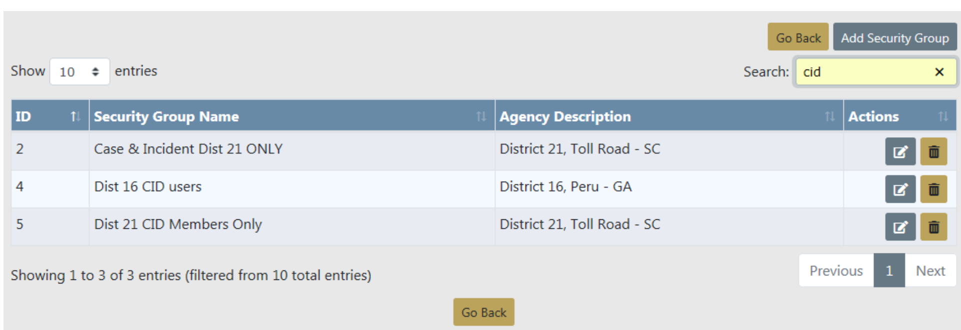
From this page, administrative users with the appropriate roles/permissions can edit existing security groups, delete security groups, and add new security groups for the agency.

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

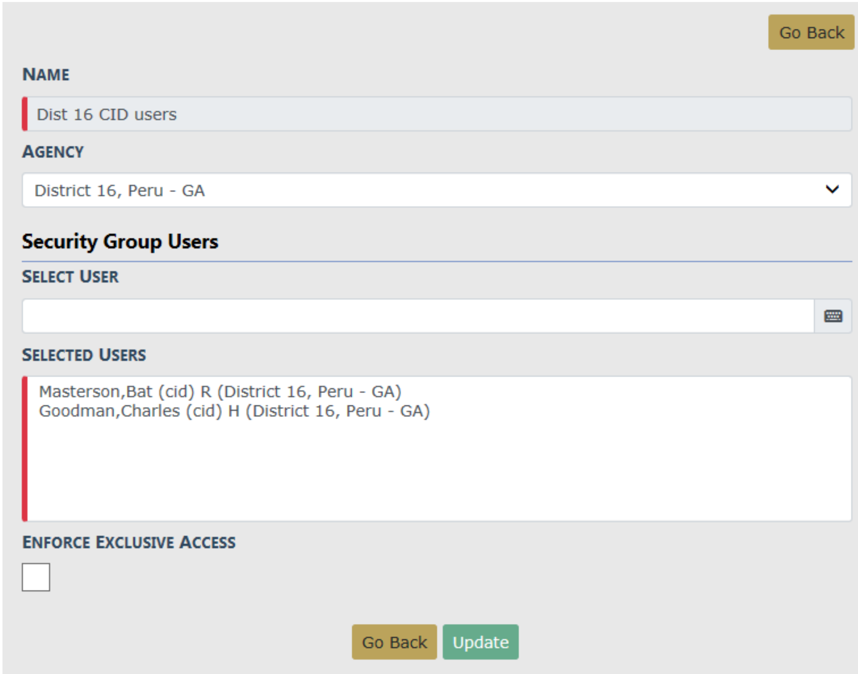
Edit Security Group

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.



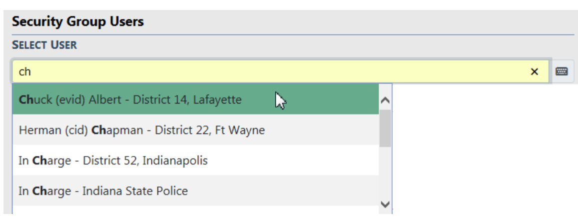
2. Click in the **Actions** column to display the *Edit Security Group* page as shown in the example.



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.

   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.

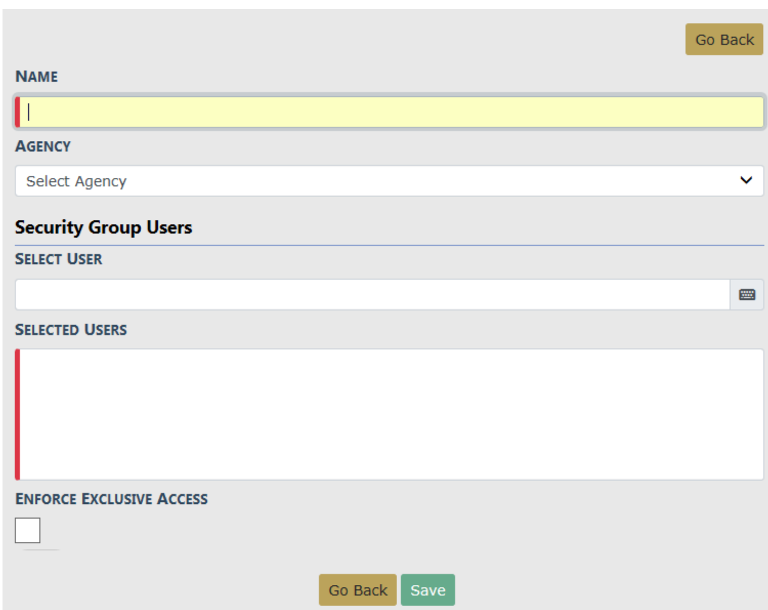
1. On the *Administrative Home* page, click the **Security Groups** icon to display the *Security Groups* page.
2. In the **Action** column, click in the same row as a security group listing to display the prompt, *Are you sure you want to delete this Work Group?*
3. Click **Yes** to confirm deletion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

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

Add Security Group

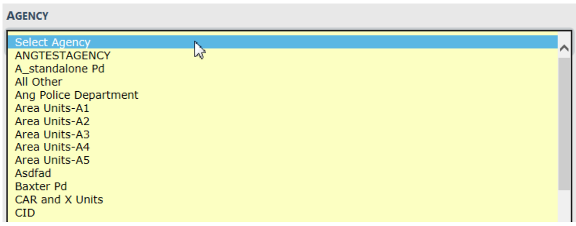
Use the following procedure to add a security group for your agency.

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.



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

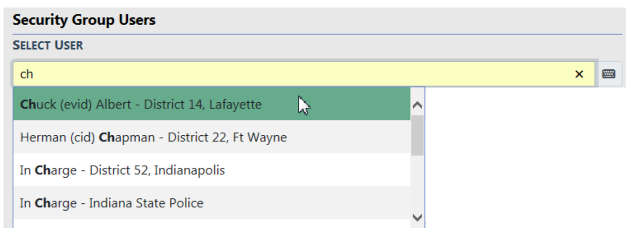
3. Click into the **Agency** field to display a list of selections as shown in the following example.



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

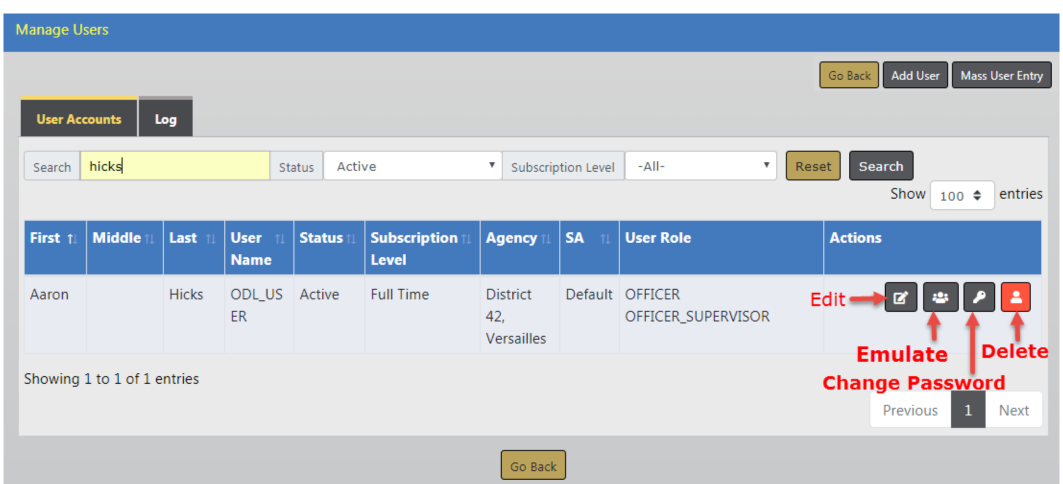
Users Overview

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 *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.

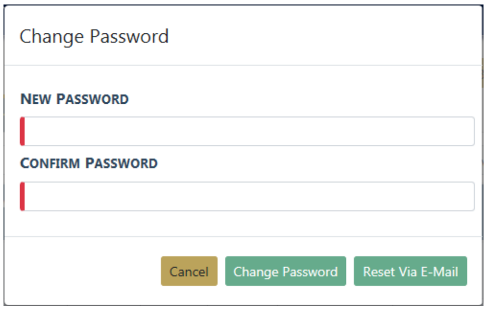
- Edit  icon
  - Click the **Edit icon** under the *Actions* column to open the *User Details* page to update user roles, employee information, security settings, etc. See "User Details" on page 97 for more information.
- Emulate users  icon
  - Click the Emulate icon under the *Actions* column.
  -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

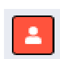
  Click the **Change Password icon** under the *Actions* column to display the *Change Password* window.

  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

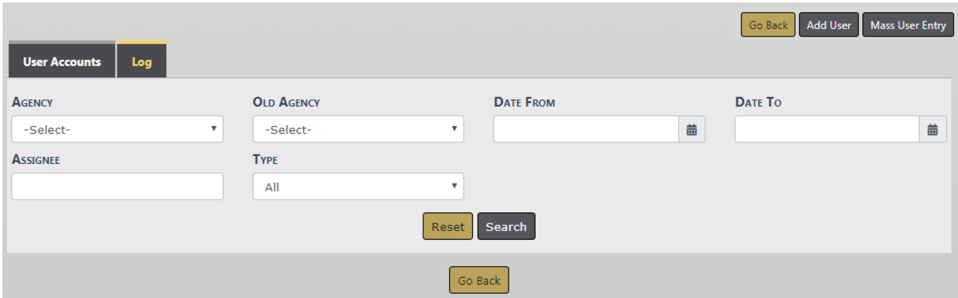
  – Click on the red or green person icon under the *Actions* column, whichever applies. (The example displays a red icon.)

  – 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.

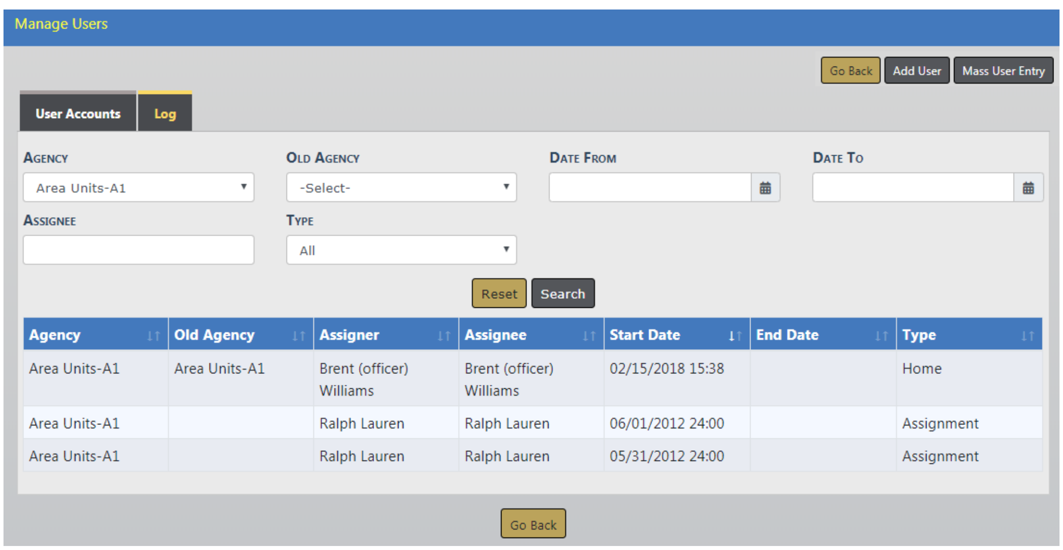
Click on the *Log* tab to open the search screen.



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

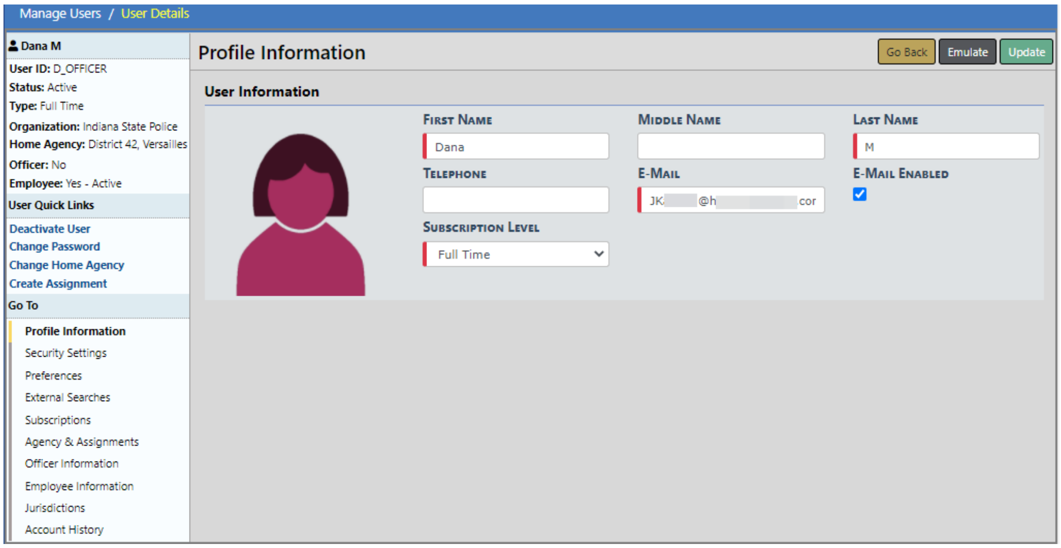
- Select a specific **Agency**. To select all, leave the choice as **-Select-**.
- Select a specific **Old Agency**. To select all, leave the choice as **-Select-**.
- Select the **Date From** and **Date To**, or leave them blank to select all dates.
- Enter all or part of the **Assignee** name, or leave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

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



User Details

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

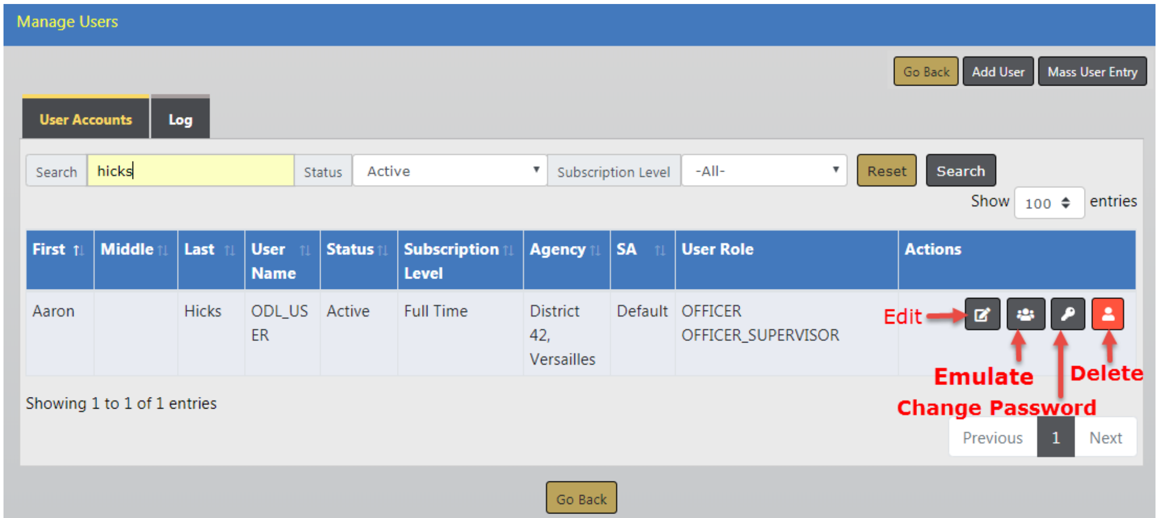


A photo of the employee can be uploaded via the Employee Management page. For details, refer to "Manage an Employee" on page 133.

Access User Details

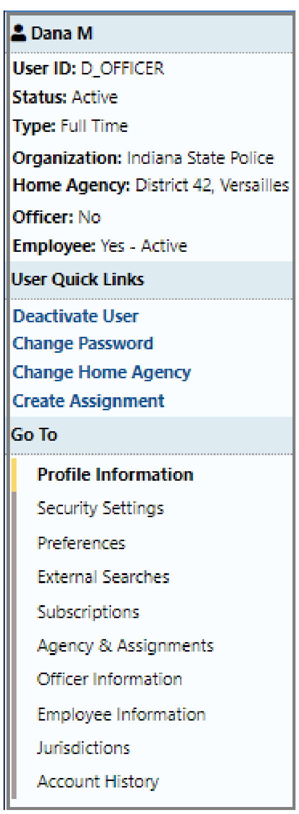
1. Access the *Manage Users* page from the *Administration* menu on the top menu bar. For instructions, refer to "Manage Users" on page 93.

2. Access the *User Details* page from the *Manage Users* page by editing or adding new users.



User Details Page Layout

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



- **User Information**.

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

  - This section is read-only.

- **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

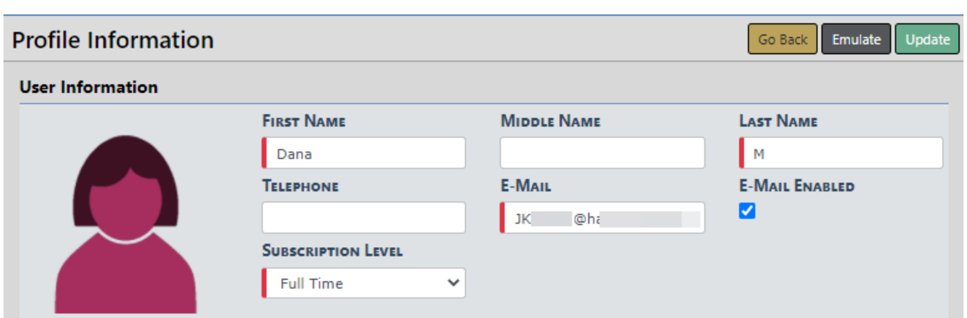
- **Go To**.

  - 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.



Refer to the following for tab details:

"Profile Information Tab" on page 106

"Security Settings Tab" on page 106

"Preferences Tab" on page 108

"Subscriptions Tab" on page 110

"Agency & Assignments Tab" on page 110

"Officer Information Tab" on page 112

"Employee Information Tab" on page 114

"Jurisdictions" on page 116

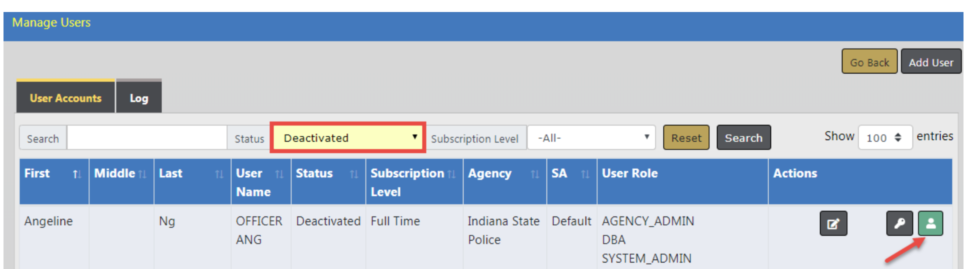
"Account History" on page 119

Activate a User

Use the following procedure to activate a user.

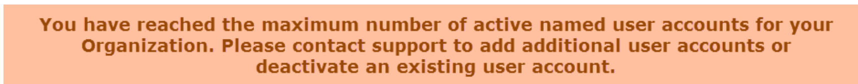
1. Access the *Manage Users* page. For more information, refer to "Manage Users" on page 93.

2. Locate the user to *Activate* and click on the **green person** icon in the *Actions* column on the user record.

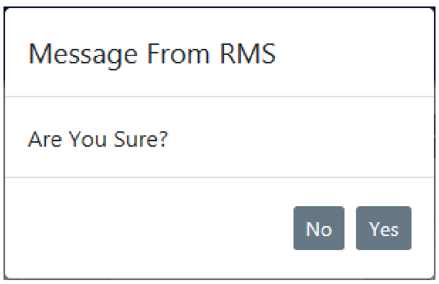


Note: The system does not allow you to create or reactivate an RMS user with a duplicate badge number.

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.



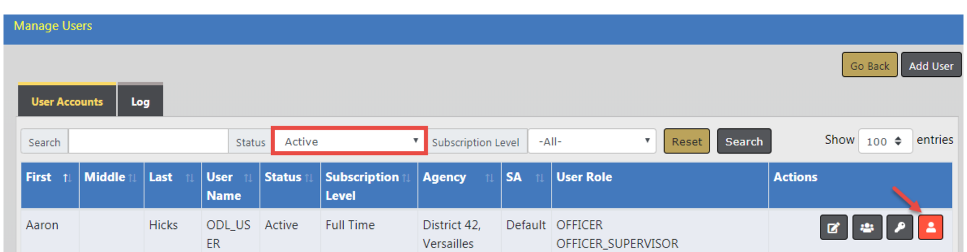
3. Click **Yes** to confirm, or **No** to return to the *Users Lookup* page.



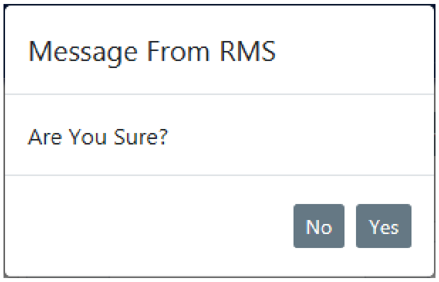
Deactivate a User

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.



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



Change Password

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

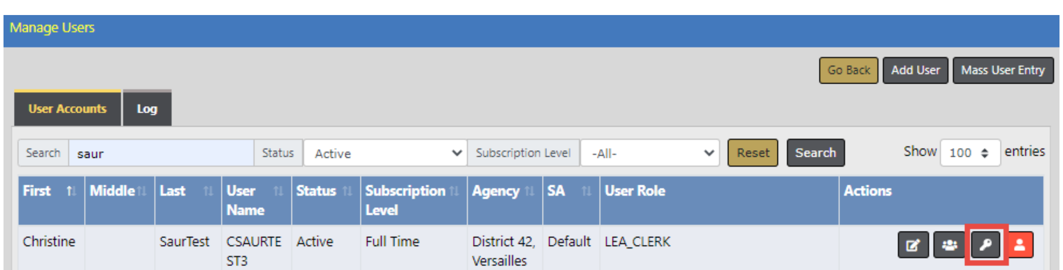
However, users are encouraged to reset their own password using the **forgot password** link on the login page. Refer to the *Forgotten Password Procedure* section in the *Online RMS User Guide* for instructions.

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

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

Reset from Manage Users Page

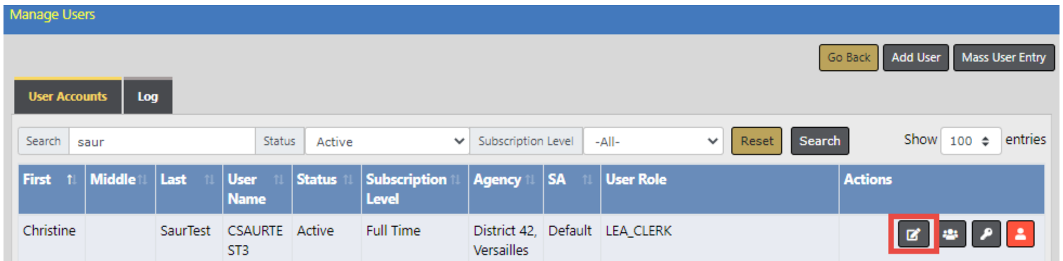
1. Access the *Manage Users* page from the Administration top menu bar and search for the user account. For instructions, refer to "Manage Users" on page 93.
2. Click on the **Change Password** icon.



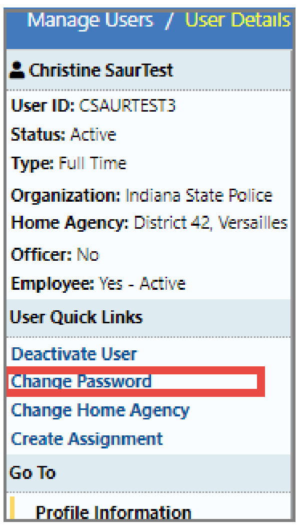
Reset from Users Detail Page

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

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



3. Click **Change Password**.

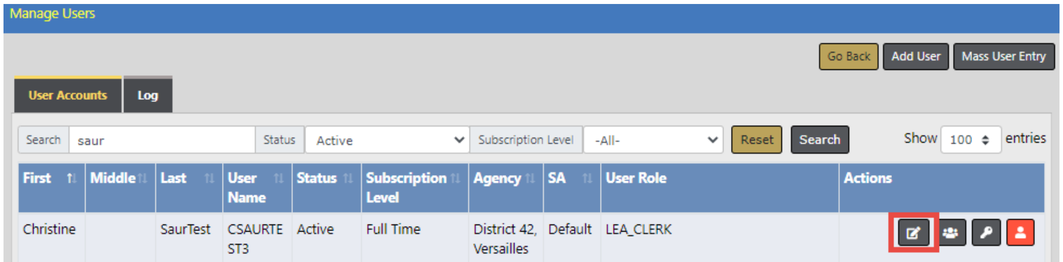


Change Home Agency

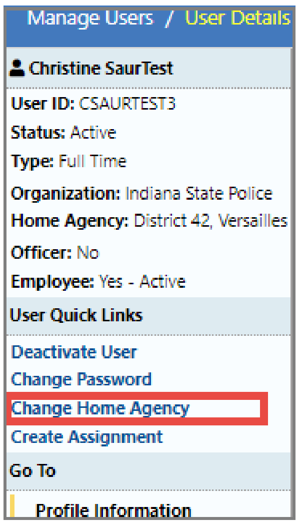
Administrators can change a user's home agency from the *User Details* page.

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.

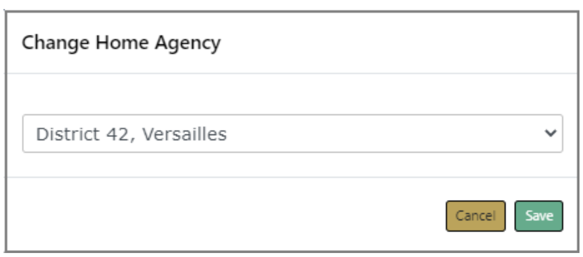
2. Click on the **Edit** icon to open the *Users Detail* page.



3. Click **Change Home Agency**.



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



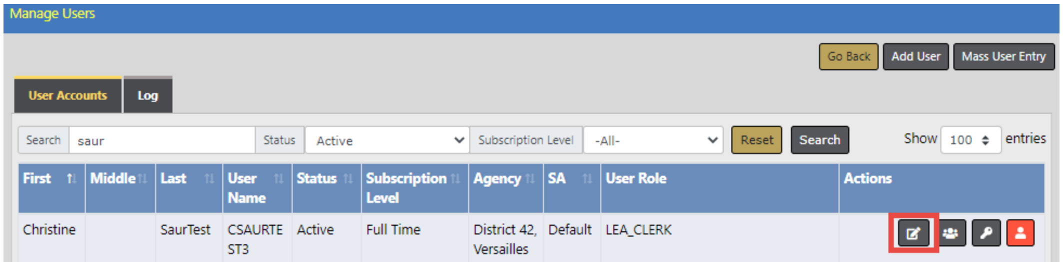
5. Click **Save**.

Create Assignment

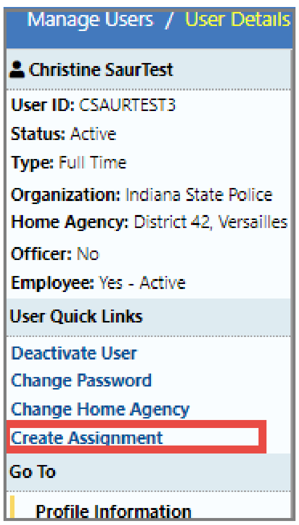
Administrators can create a user's assignment from the *User Details* page.

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

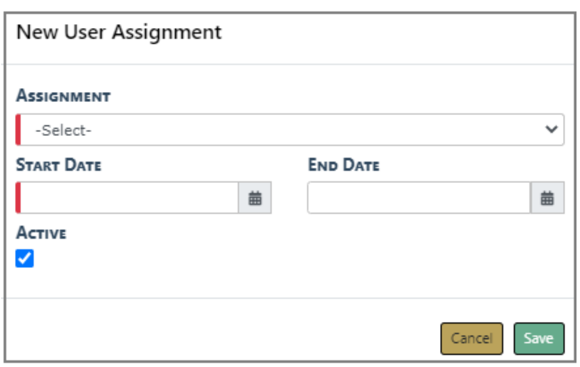
2. Click on the **Edit** icon on the *Manage Users* page to open the *Users Detail* page.



3. Click **Create Assignment**.



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



5. Select the **Assignment** from the drop-down list.

6. Select the **Start Date**.

7. Optionally, select an **End Date**.

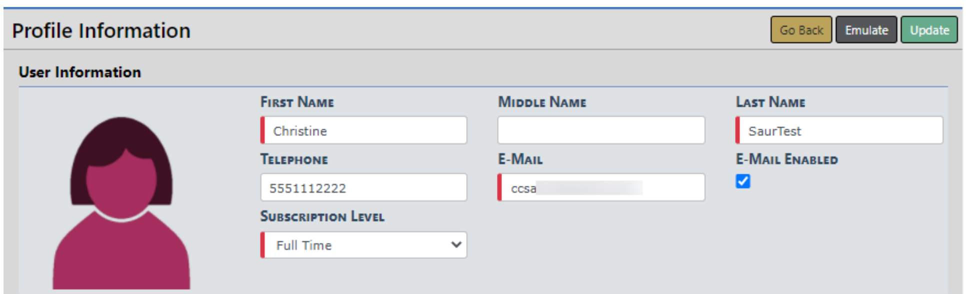
8. Deselect **Active** if you do not want enable this setting at this time, otherwise, keep it checked.

9. Click **Save**.

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

Profile Information Tab

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



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, mobile integration, and Team Support login id.

Roles and Security Levels

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

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

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

3. Check the **Is Caliber Employee System Admin** box if this employee is an agency admin, or leave it blank.

4. Click on one or more **Roles** to *select* from the list of roles that appear on the left.

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

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

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

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

Two Factor Authentication

1. Check the box to Enable.

2. Optionally, type the User Name.

Mobile Integration

1. Enter the **Mobile User Name**, if applicable.

2. Enter a **Terminal ID**, if applicable.

3. Enter the **Unit ID**, if applicable.

4. Enter the **One Time Password User Name**, if applicable

Team Support

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

The following criteria must be met to utilize this feature:

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

– Permission category *Support - Access Team Support SSO* assigned to their role.

– Permission category *EJS Support - submit tickets* assigned to their role.

– Team Support Login ID.

Follow these steps to grant access to user:

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

   - Suppose a login id exists and the user chooses to submit a ticket from within Online RMS. In that case, a new browser window opens, logging the user into the Team Support website automatically, where they can submit a ticket.

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

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

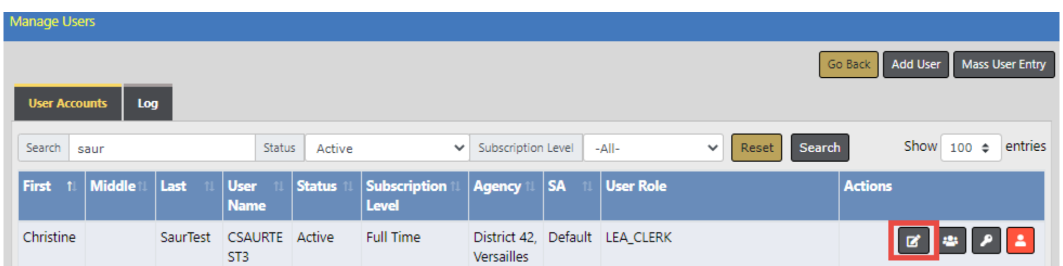
When finished updating the User, click **Update** on the top right of the window.

Preferences Tab

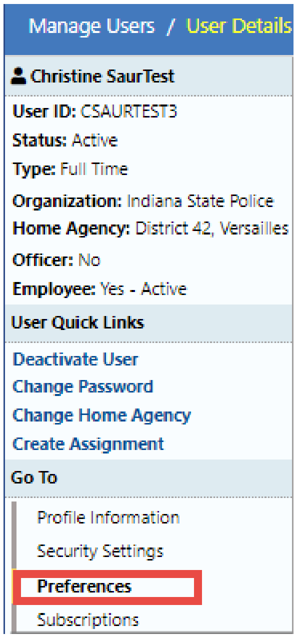
Administrators can update the user's preferences from the *User Details* page.

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

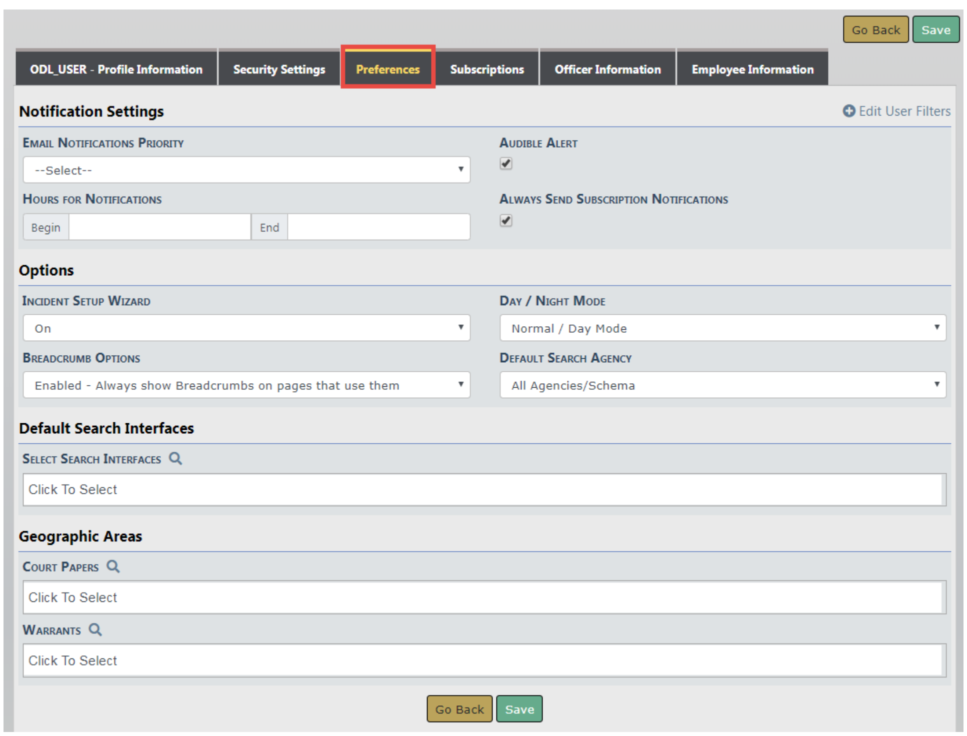
2. Click the **Edit** icon on the *Manage Users* page.



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



4. *Preferences* opens.



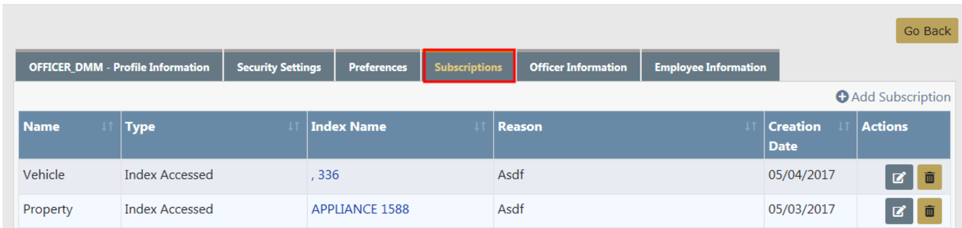
5. Complete the form as needed.

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.



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.

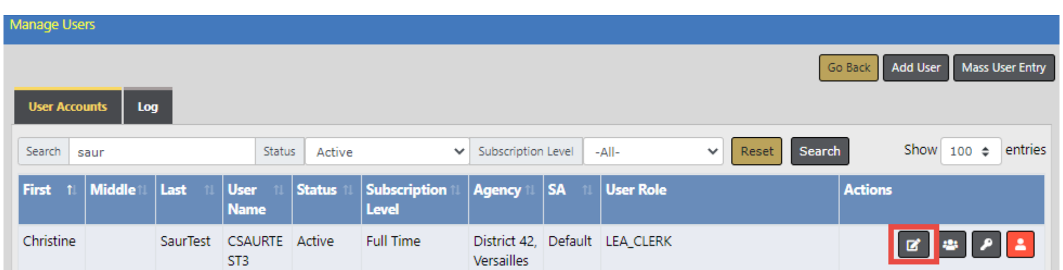
For more information on creating a new subscription, refer to the Master Indices chapter in the *Caliber Online RMS User Guide*.

Agency & Assignments Tab

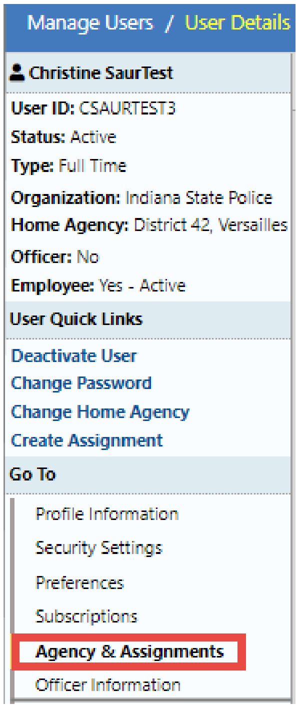
Administrators can update the user's agency and assignments from the *User Details* page.

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.

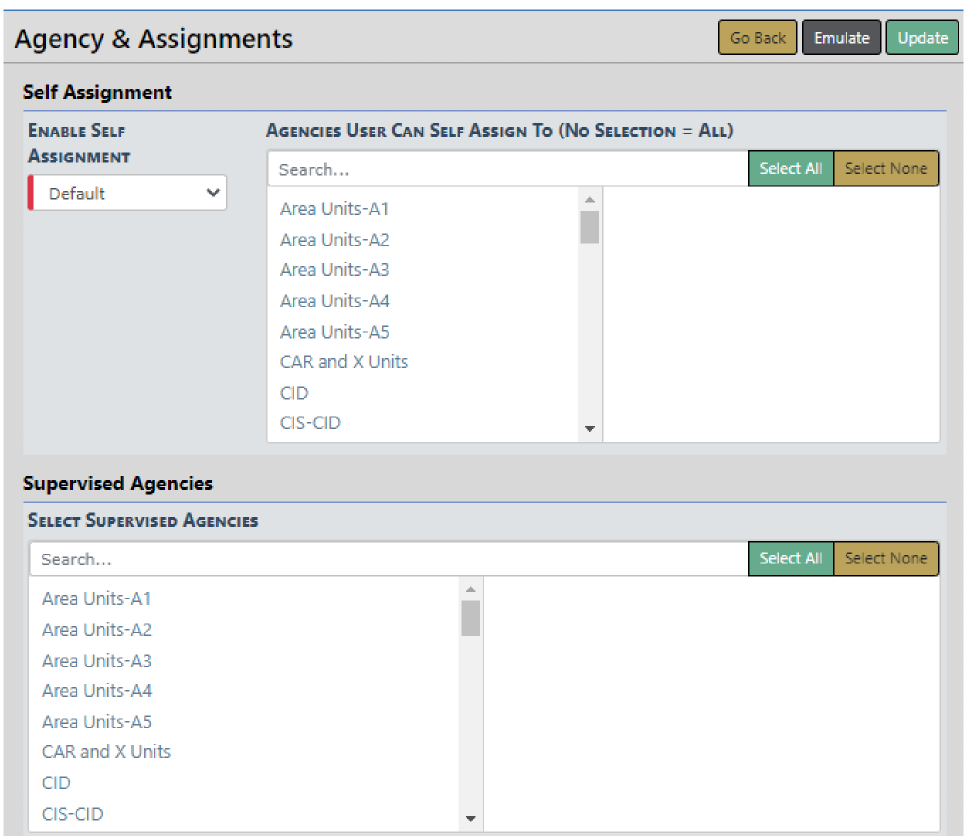
2. Click the **Edit** icon on the *Manage Users* page.



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



4. *Agency & Assignments* opens.



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**.

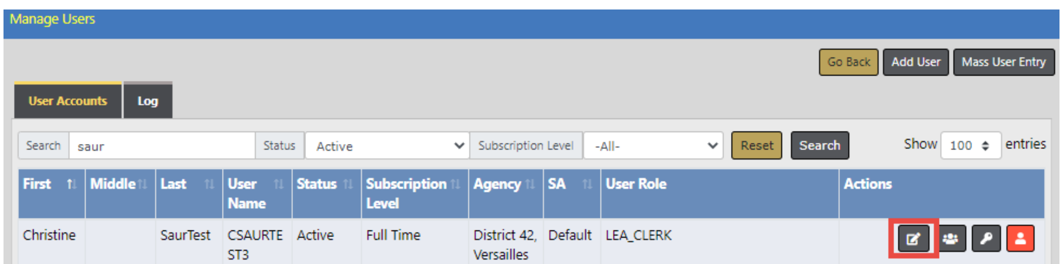
8. Click the **Update** button.

Officer Information Tab

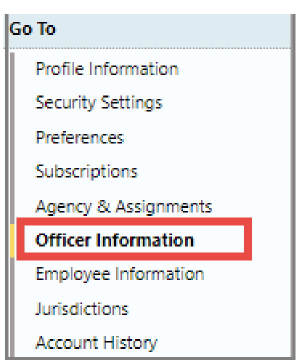
Administrators can update the user's officer information from the *User Details* page.

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.

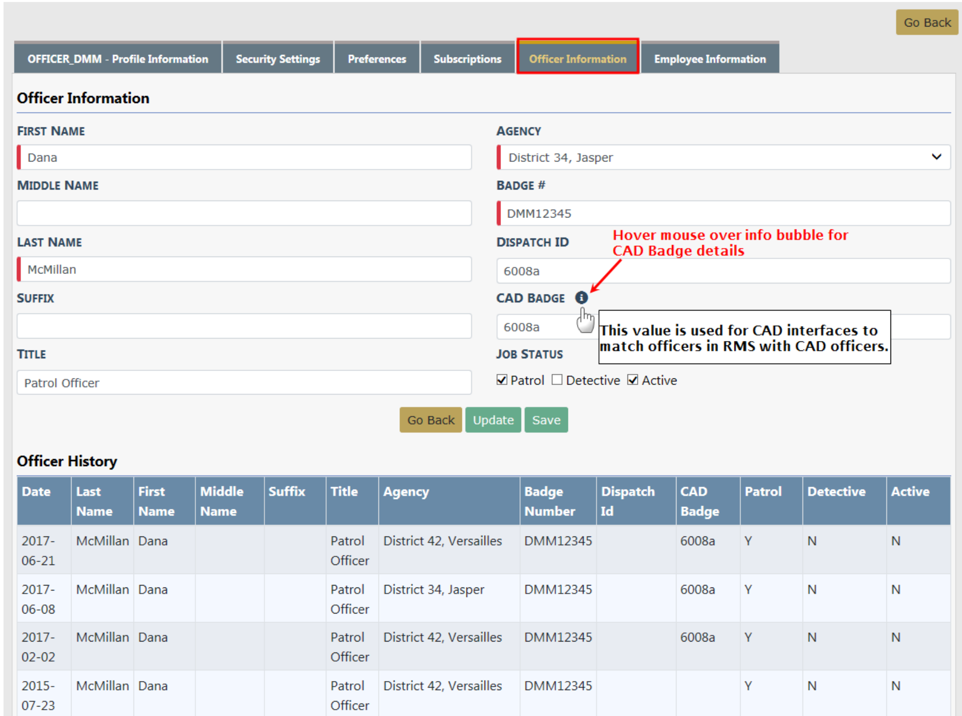
2. Click the **Edit** icon on the *Manage Users* page.



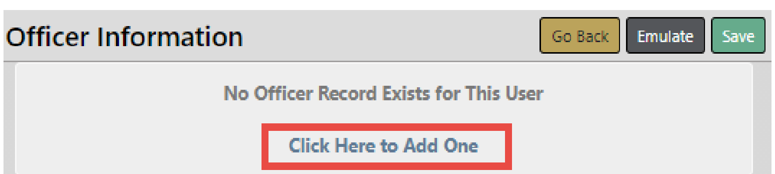
3. Click **Officer Information** on the *User Details* page.



4. *Officer Information* opens.



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



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

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

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

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

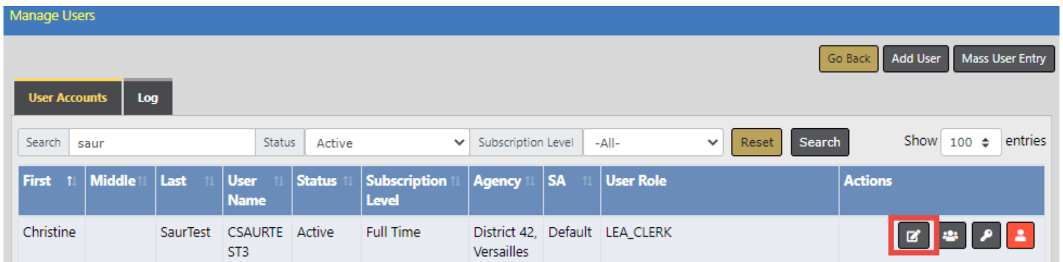
6. Click the **Update** button on the top right of the form to save.

Employee Information Tab

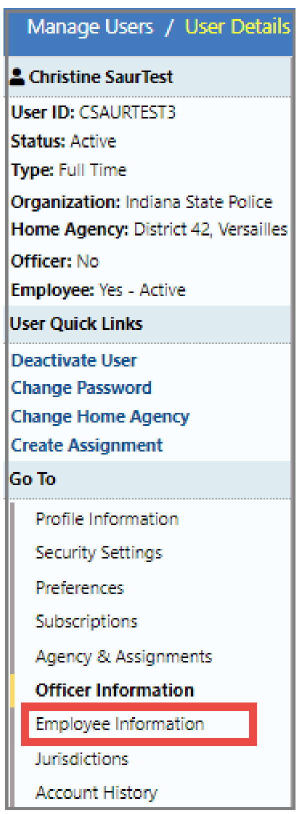
Administrators can update employee information from the *User Details* page.

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

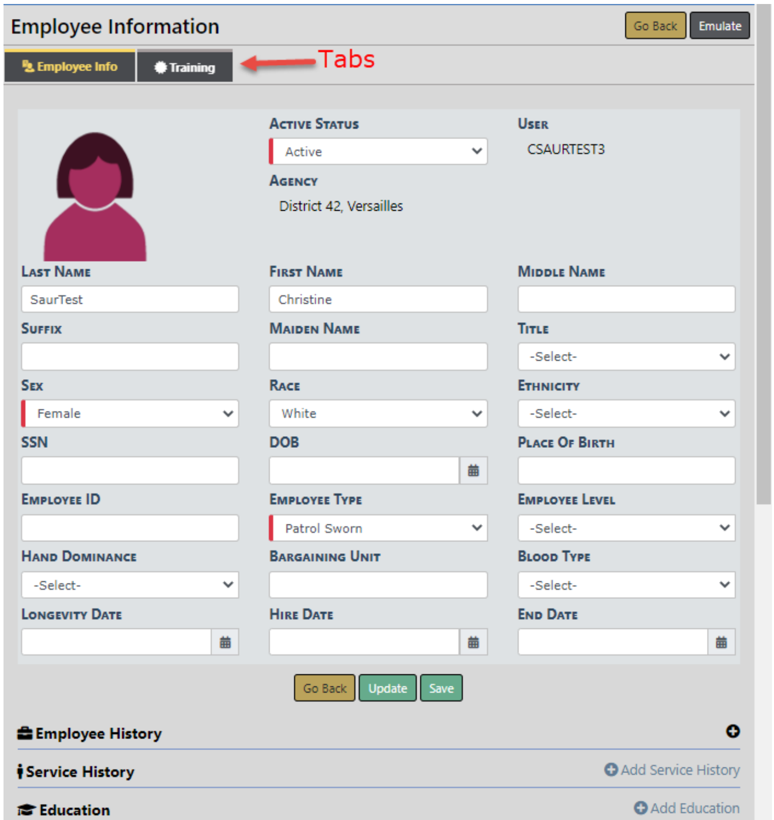
2. Click the **Edit** icon on the *Manage Users* page.



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



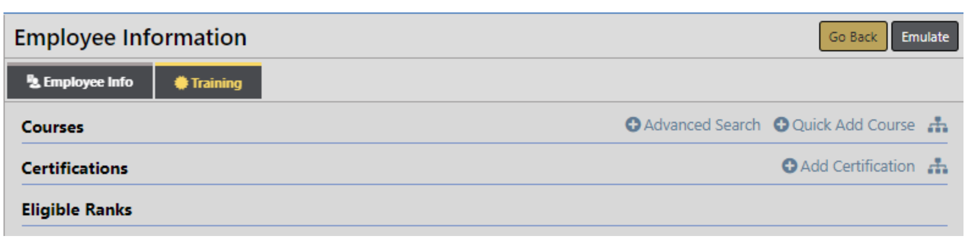
4. *Employee Info* sub-tab opens.



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.

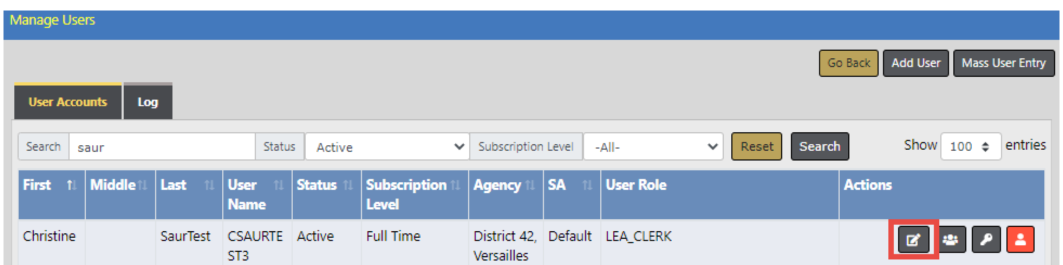
Jurisdictions

You can update, add, enable or disable Jurisdictions.

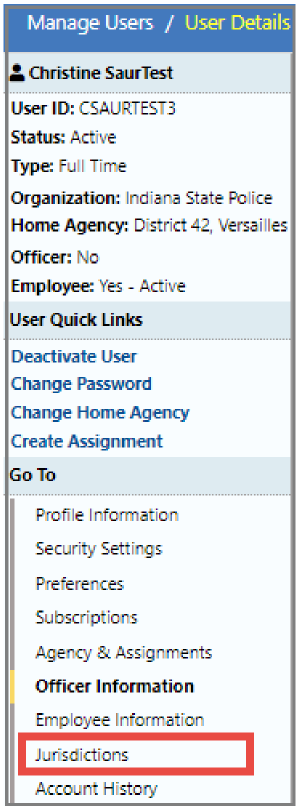
Update or Add Jurisdiction

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.

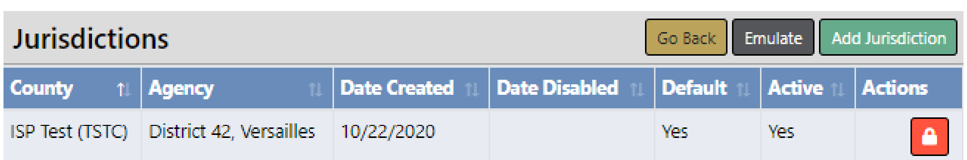
2. Click the **Edit** icon on the *Manage Users* page.



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



4. *Jurisdictions* opens.



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.

   a. Select a **Jurisdiction** from the drop-down list.

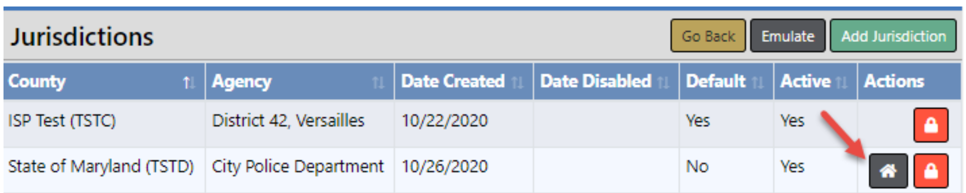
   b. If applicable, select an **Agency** from drop drop-down list.

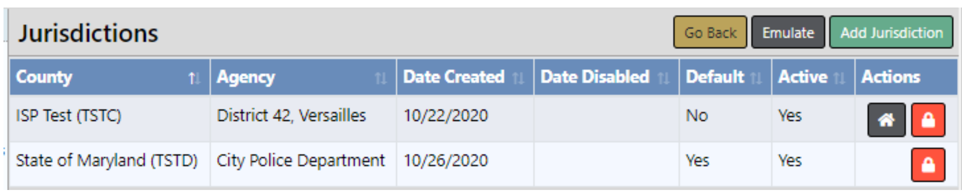
   c. Click **Save**.

Change the Default Jurisdiction

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

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



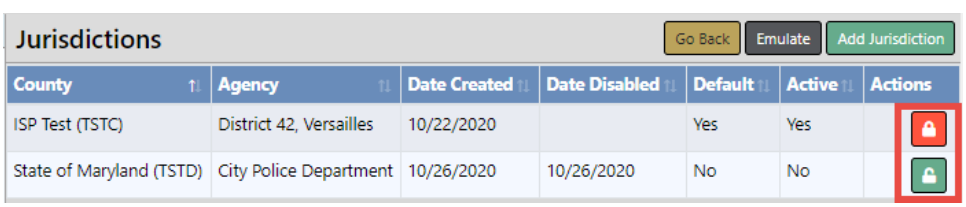


- Hover your mouse over the icon to see a description of the icon.

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**.



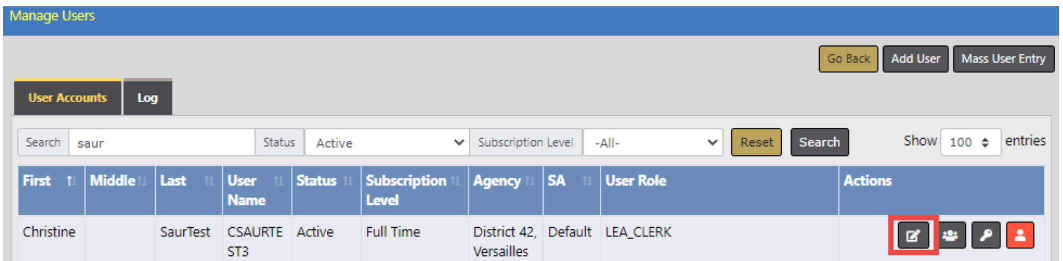
2. Click **Yes** to confirm, or **No** to return to Jurisdictions without performing the requested change.

Account History

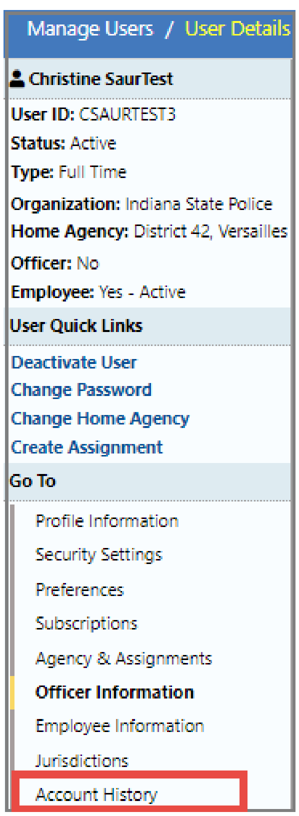
Caliber Public Safety Online RMS automatically captures and logs when users log in or out of the application and whenever user account statuses change.

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.



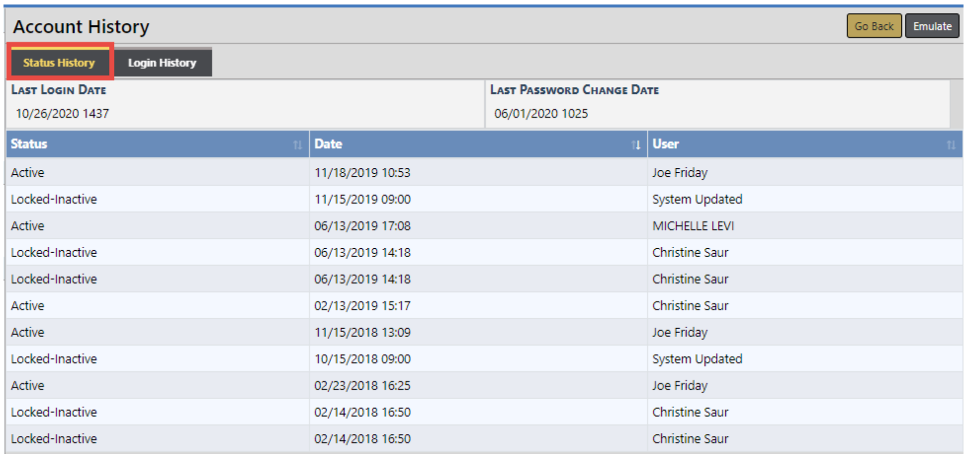
3. Click **Account History** on the *User Details* page.



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:

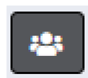
- From the *Manage Users* page.

- 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.

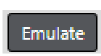
2. Click on the emulate icon  in the Actions column to display that user's Home page.

User Details Page

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

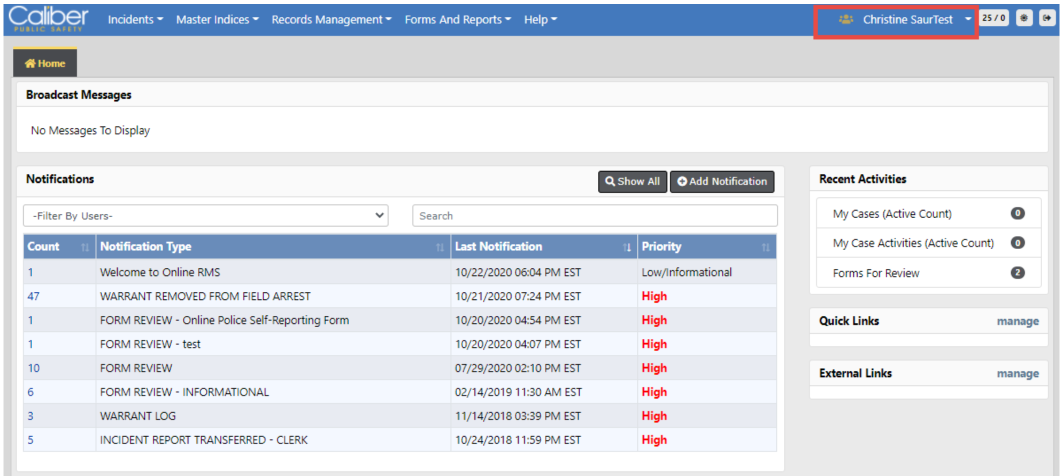
1. Access the *User Details* page for that user. For more information, refer to "User Details" on page 97.

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.

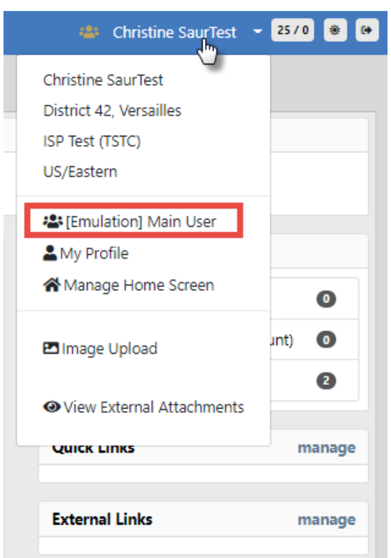
2. Navigate through Online RMS as if you were the user to locate the information you need.

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.



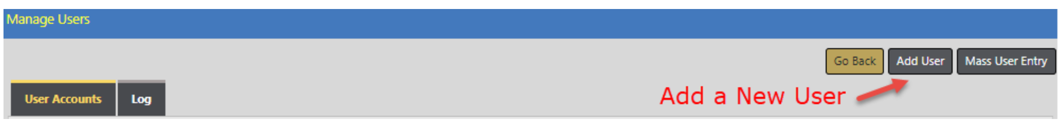
2. Your own **Home Page** appears and your name displays on the top right of the window.

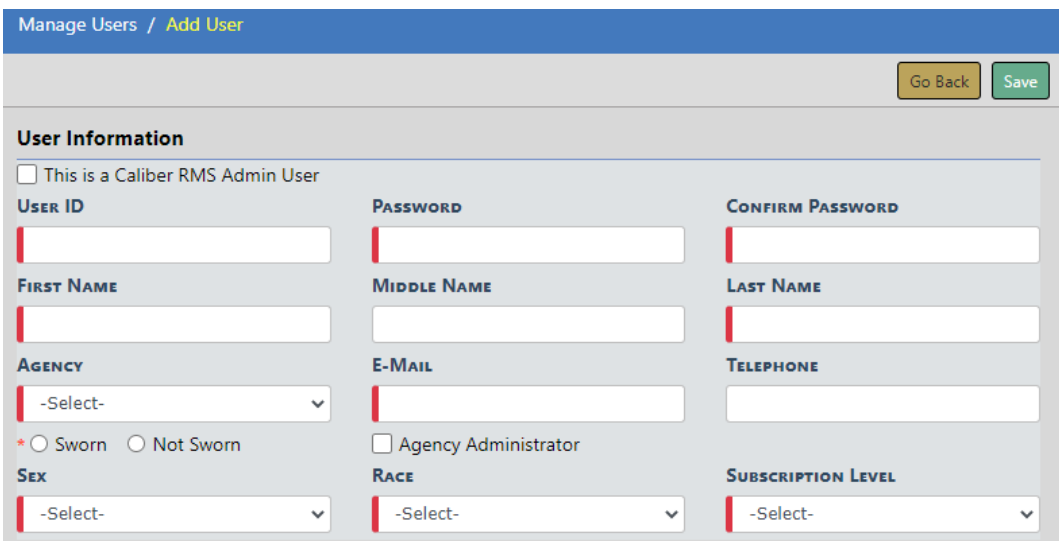
Add a User

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.





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.

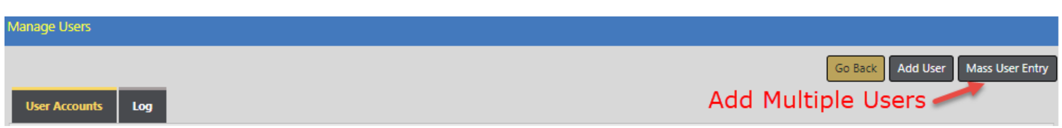
Add Mass Users

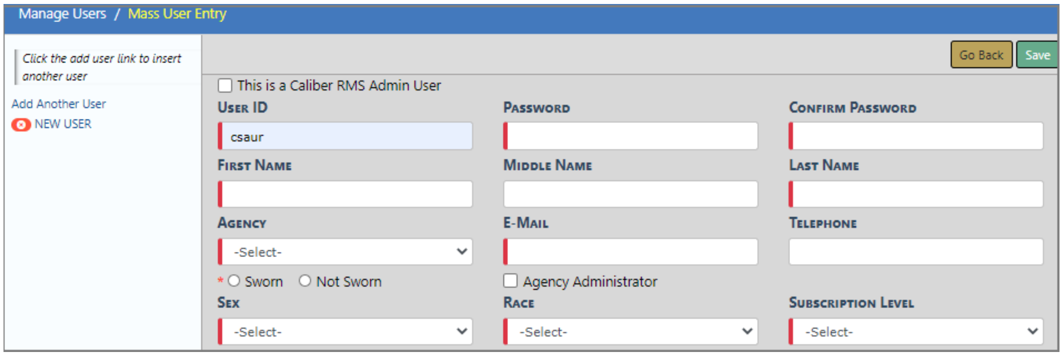
Use the following procedure to add multiple user records at once.

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.





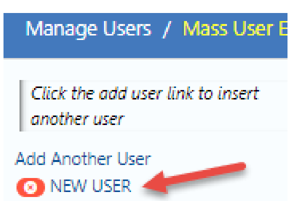
Note: Agency administrators can easily track end-user subscriptions by monitoring the allocation and usage of **User Subscriptions**. If your agency's user subscription allowed limit has been reached, you receive a warning stating the maximum number has been reached and to contact support to add additional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

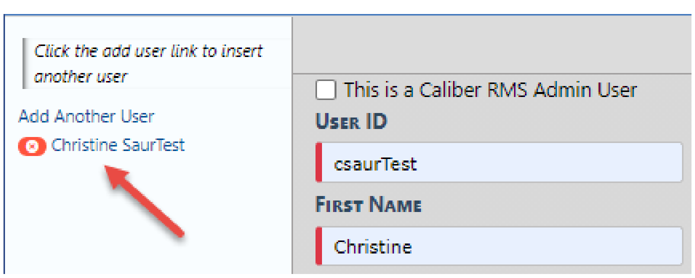
You have reached the maximum number of active named user accounts for your Organization. Please contact support to add additional user accounts or deactivate an existing user account.

3. Check **This is a Caliber RMS Admin User** if an admin user, otherwise leave it blank.

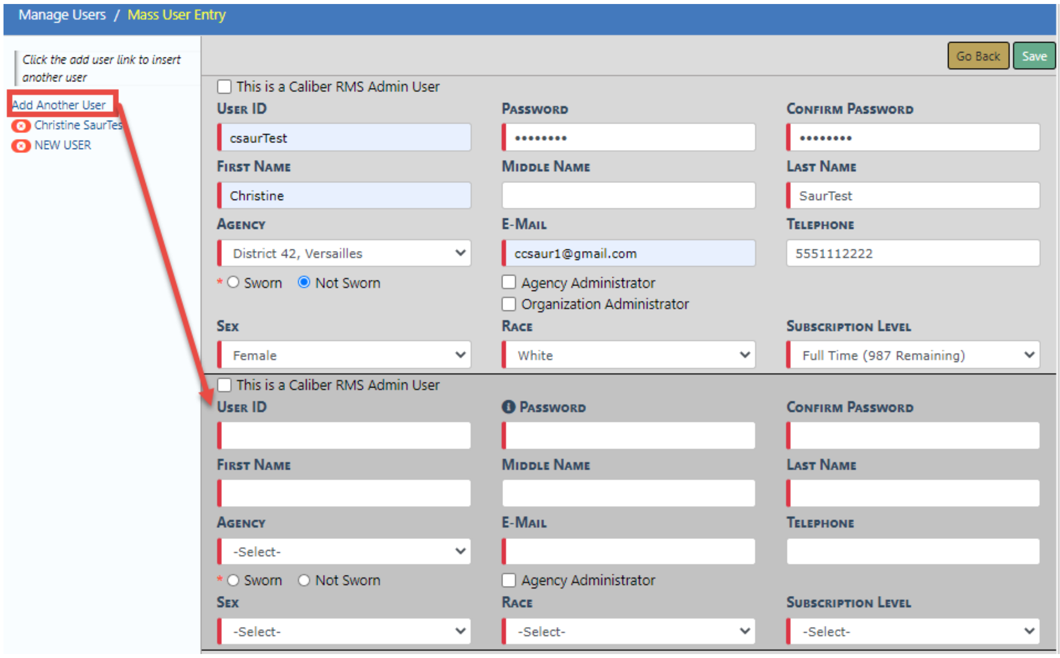
4. Complete the form with the appropriate information.

   - 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.





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



6. Repeat steps 3 and 4.

7. Repeat steps 5 and 6 until all the new users have been entered.

8. Click **Save** to save all new entries.

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

10. On the *Manage Users* page, search for the newly added records to update the roles, preferences, subscriptions.

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

Chapter 8. Personnel Management

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

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

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

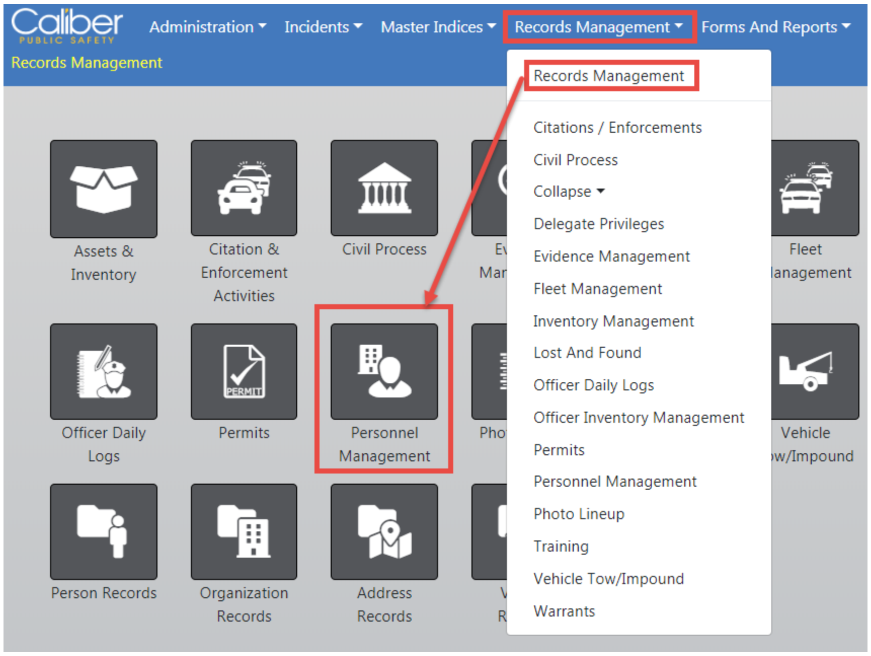
  Note: The new permission categories are assigned to the *System_Admin*, *Organization_Admin*, and *Agency_Admin* roles, respectively, for the initial 10.30 release.

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

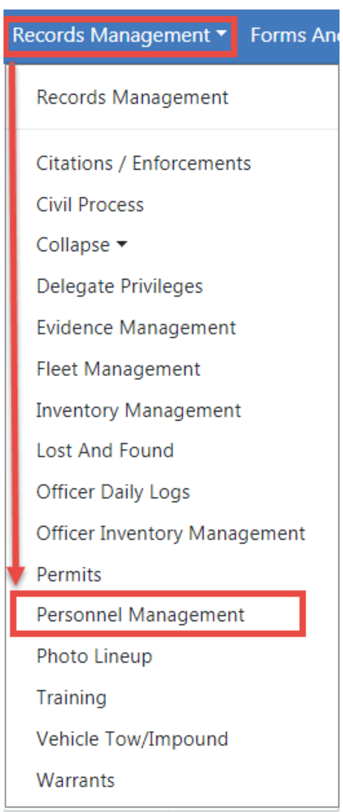
Access Personnel Management

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.

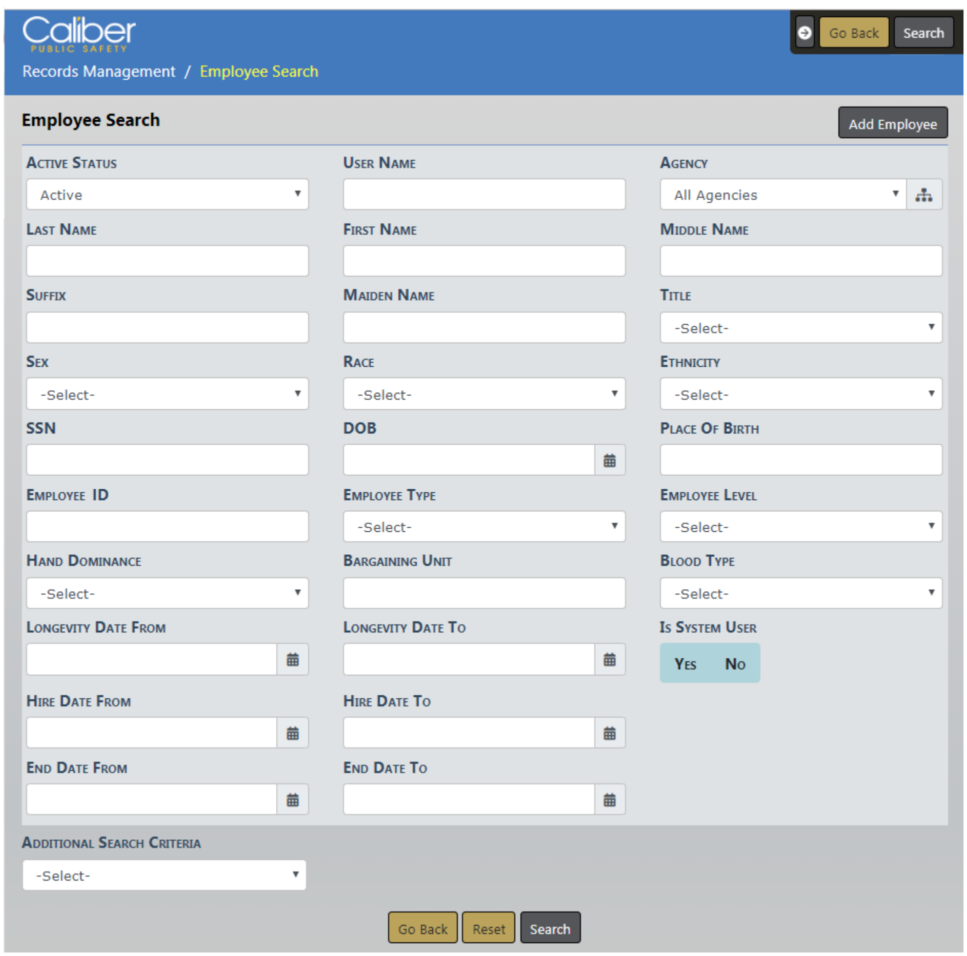
See "Employee Search" below and "Add an Employee" on page 131 for instructions on searching and adding employees, respectively.

Employee Search

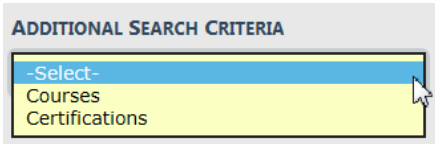
Use the following procedure to search for specific employee records.

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.



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

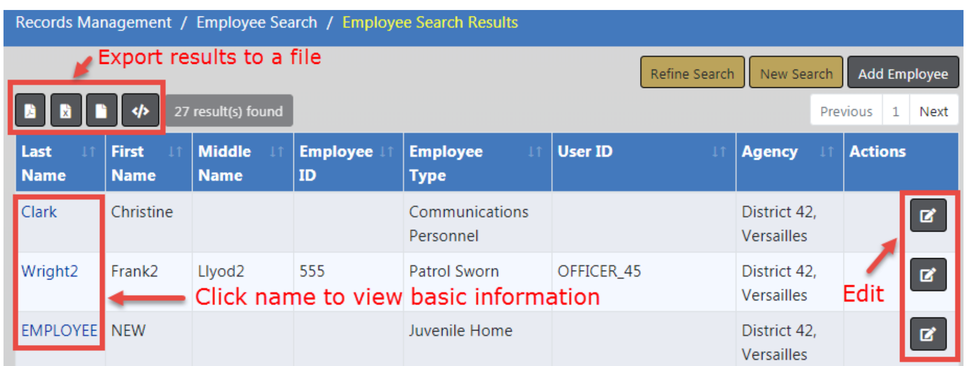


Note: Leave the **Is System User** Yes and No options **blank** to return a list of employees that match the search criteria, regardless of whether or not they are Online RMS users. Click **Yes** to return a list of employees that *are* only Online RMS users. Click **No** to return a list of only employees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

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

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

   Employee Search Results Example



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

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

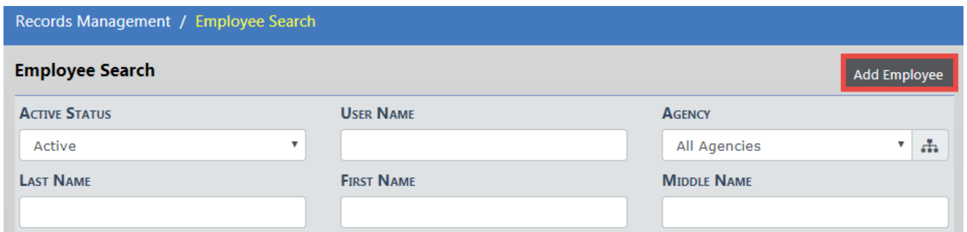
   Refer to "Manage an Employee" on page 133 for instructions on editing employee records.

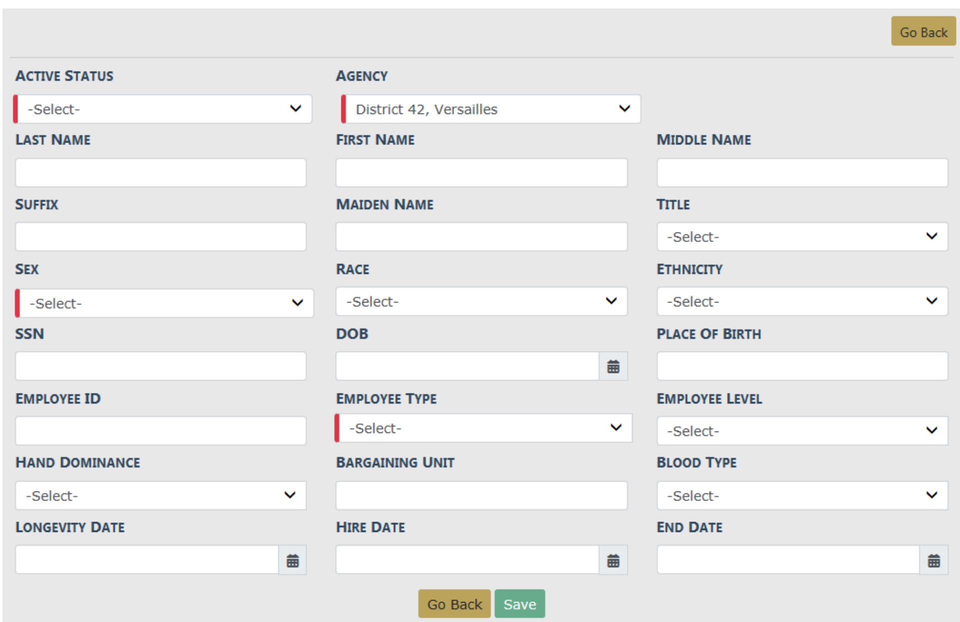
Add an Employee

Use the following procedure to add an employee record.

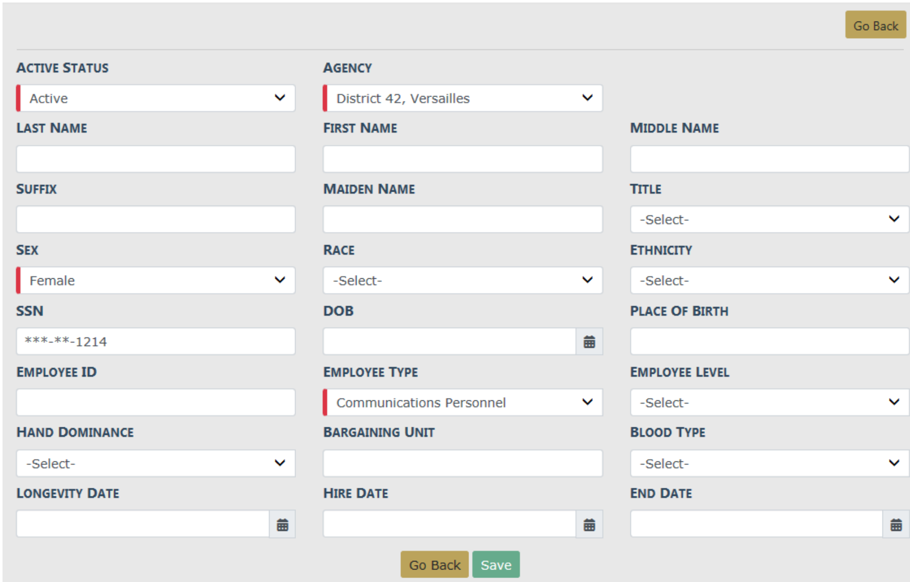
1. Access the *Personnel Management* page. (See "Access Personnel Management" on page 127, if needed.)

2. Click the **Add Employee** button on the top right of the *Employee Search* page to open the *Employee* page.



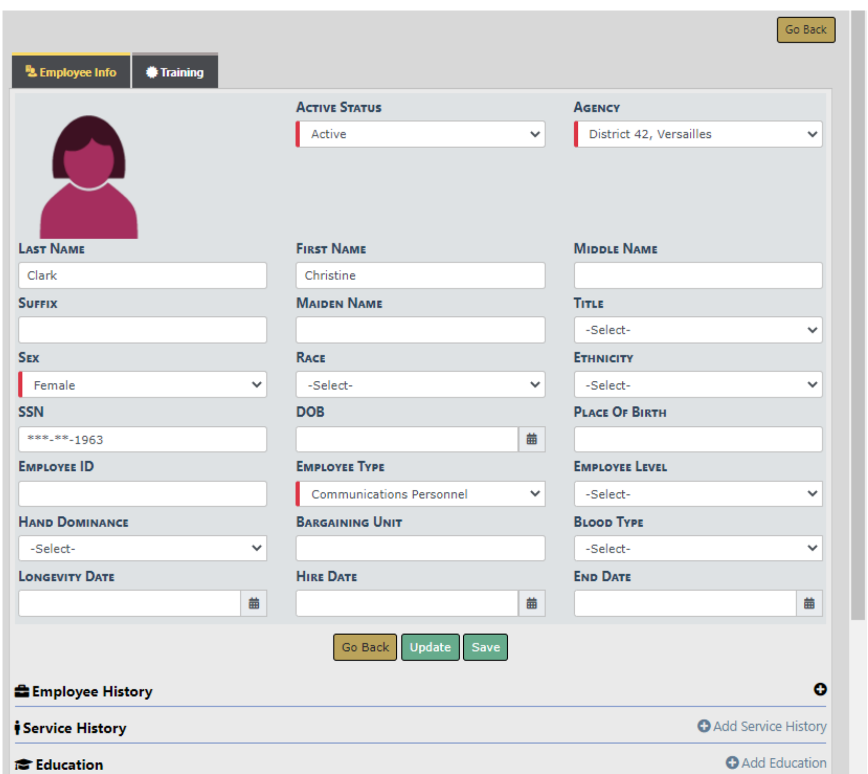


3. Enter the applicable information in the fields provided.



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

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



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

Additional Data

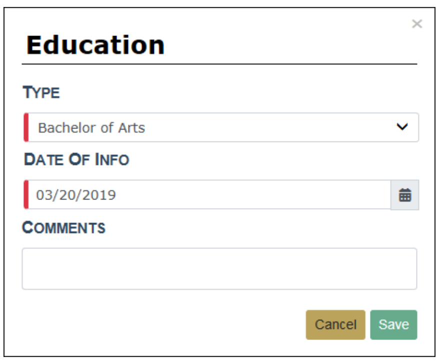
This area is used to capture other employee data such as, Service History, Education, Languages, Addresses, etc. You can also attach documents or photos, and add a picture of the employee.

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

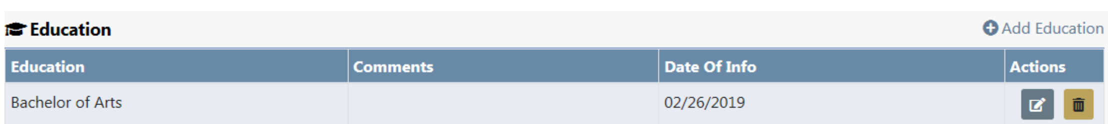
Example:

a. Click on the **Add Education** link to display the **Education** entry form.

b. Enter the appropriate data and click **Save**.



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



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.

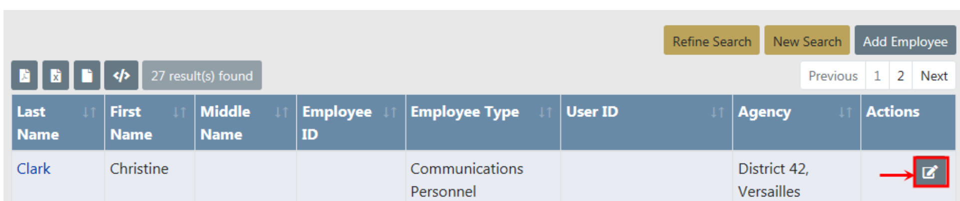
Update Existing Employee Record

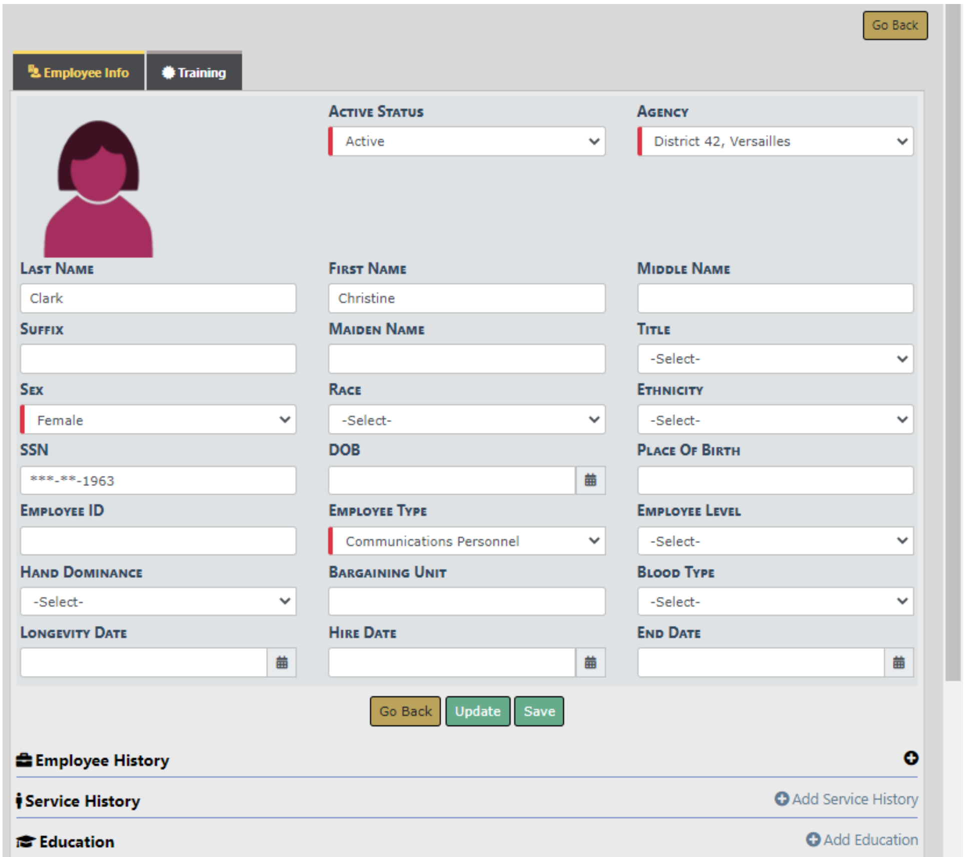
Use the following procedure to update an employee record.

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.

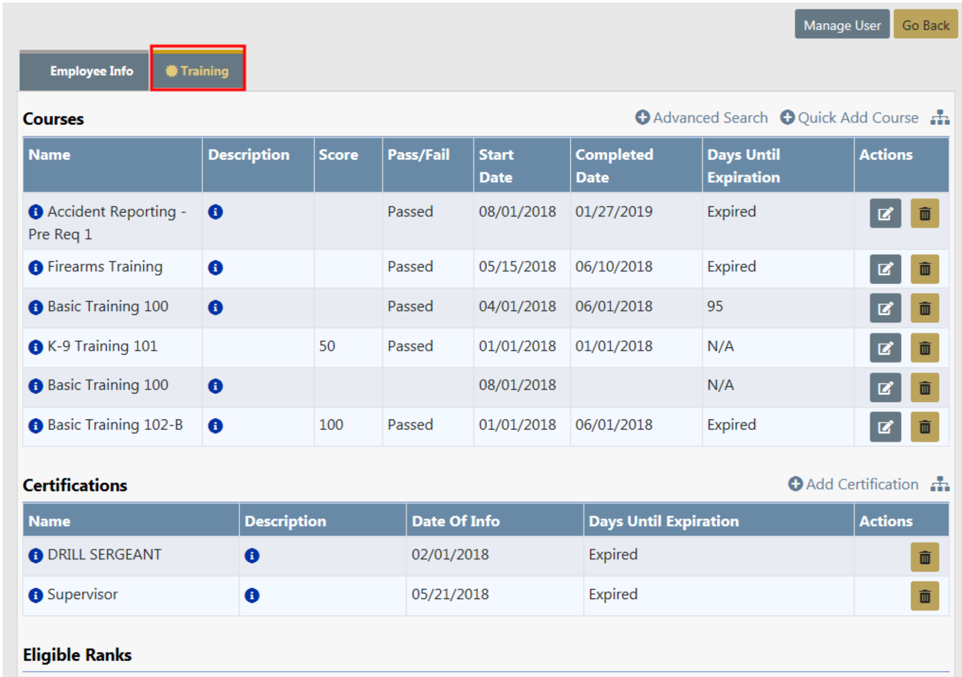




4. To add an employee picture, page down while on the *Employee Info* tab then click the **Add Attachment** link, upload the photo, then choose **Employee Photo** as the image type.

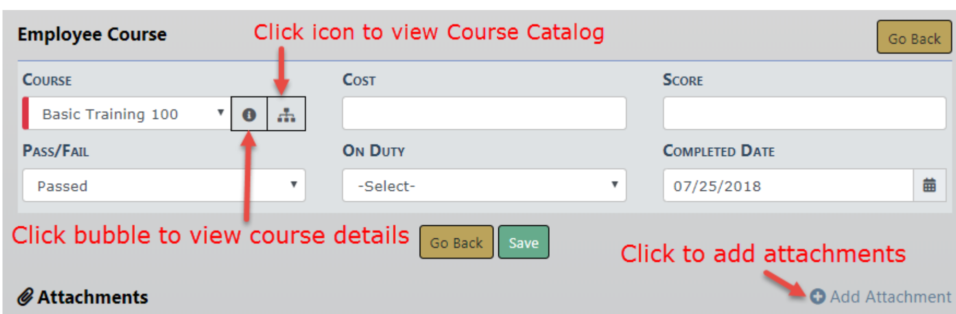
5. Make other changes as needed on the *Employee Info* tab. Refer to "Add an Employee" on page 131 for instructions on adding additional data options.

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



Courses

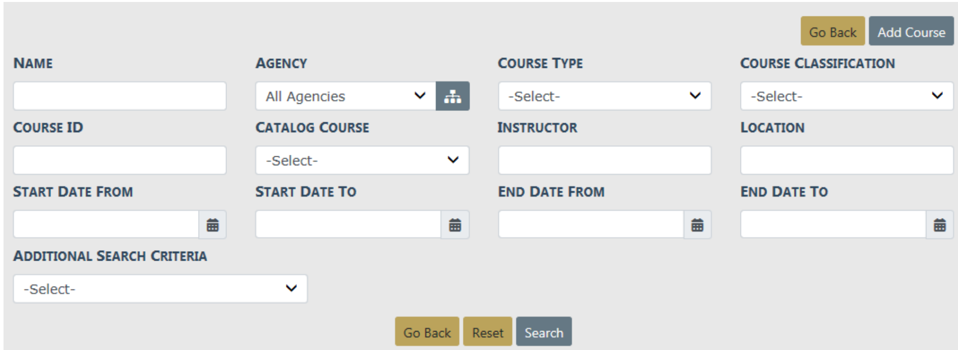
a. Click **Quick Add Course** to add a course without first searching for an existing course, then click **Add Attachments** to add attachments, or click **Save** to add the course to the employee record without attachments. For more information on attachments, refer to "Attachments" on page 11.



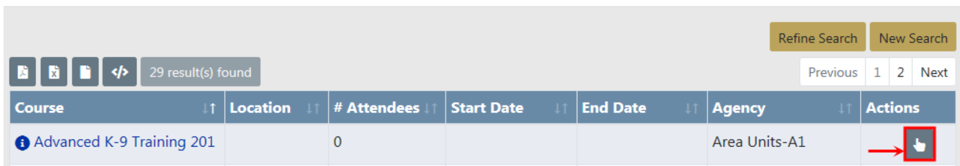
Click on the information bubble to view course details without leaving the page.

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

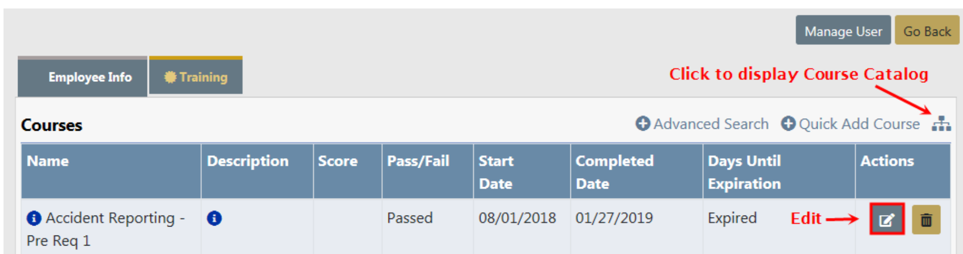
b. Optionally, click **Advanced Search** link to search for and select an existing course. Enter search criteria then click **Search** to display the *Course Search Results*.



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

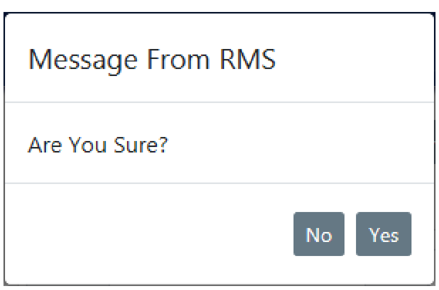


c. Click the **Edit** icon on the search results screen to open *Employee Course Information*. Make necessary changes then click **Save**.



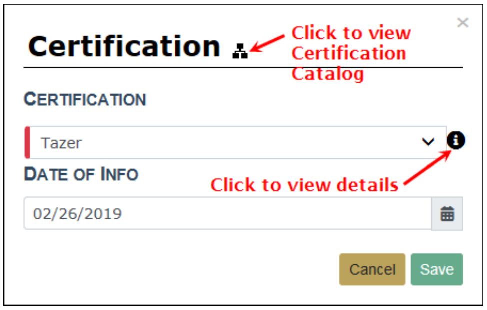
d. Click the **Delete** icon to delete a *Employee Course Information* record.

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



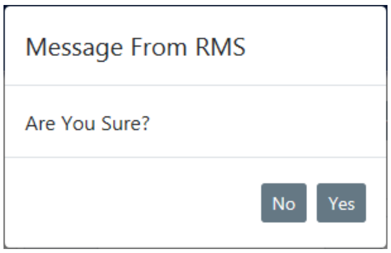
Certifications

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 arching (saving) a copy prior to the update.

Save

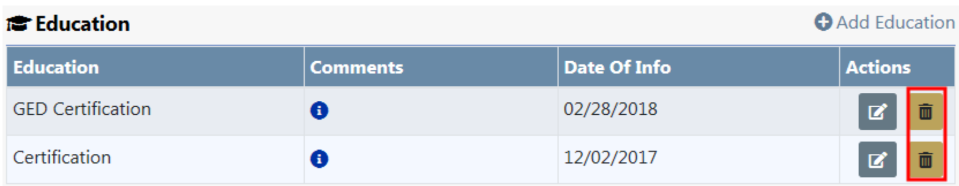
This option creates a new *Master Employee* record with your changes, and archives (saves) a copy of the master record before the update. *Archived* data is an accumulation of historical information that can be viewed later. Archived data is not changeable; it is meant to be a snapshot in time.

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

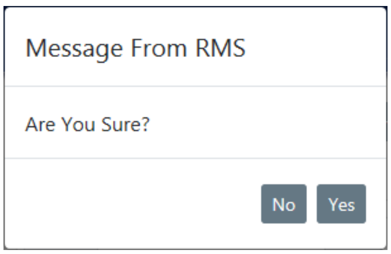
Delete Additional Options

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

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



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

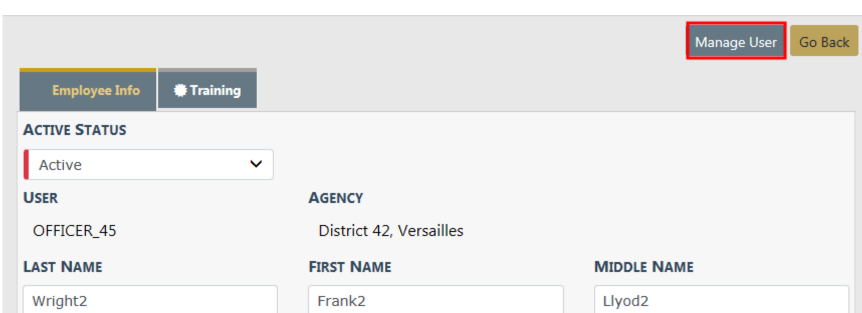


If you chose to click **Yes**, then the *Additional Option* record is permanently removed and cannot be retrieved or viewed later.

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

Navigate to the User Record

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



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.

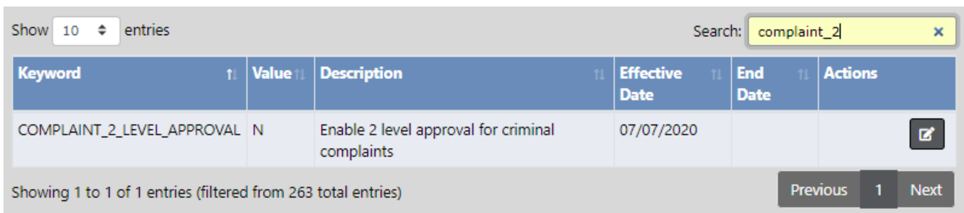
Level 1 is the default setting. Your agency administrator can elect to turn on the 2-Level Approval Process using the **Maint Value** settings under the Administration menu.

Turn on Criminal Complaint Approval Level 2

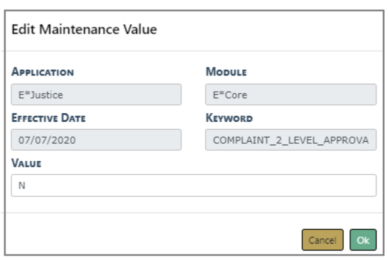
With appropriate permissions, you can turn on 2-Level Approval for your agency using **Maint Value** settings:

1. Access the **Maint Value** table. For instructions, refer to “Access Maintenance Values” on page 344.

2. In the Search field, type **complaint_2** to display the record.



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



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

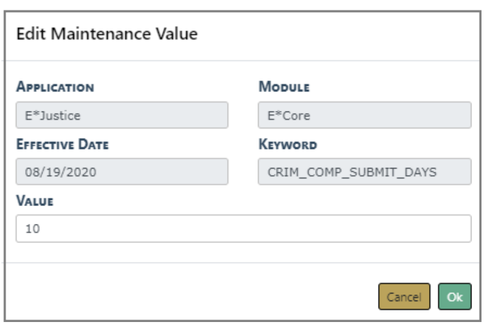
- Criminal Complaint Ready to be Submitted

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 344.
2. In the Search field, type **crim_comp** to display the record.

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



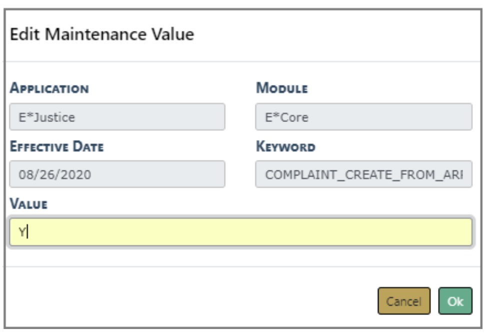
4. Enter the number of days in the **Value** field.
5. Click **OK**.

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 344.
2. In the Search field, type **complaint_create** to display the record.

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



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, CWOF, Guilty, Not Guilty

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

Notification Types

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

Chapter 11. Training Module

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

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

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

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

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

    Template

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

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

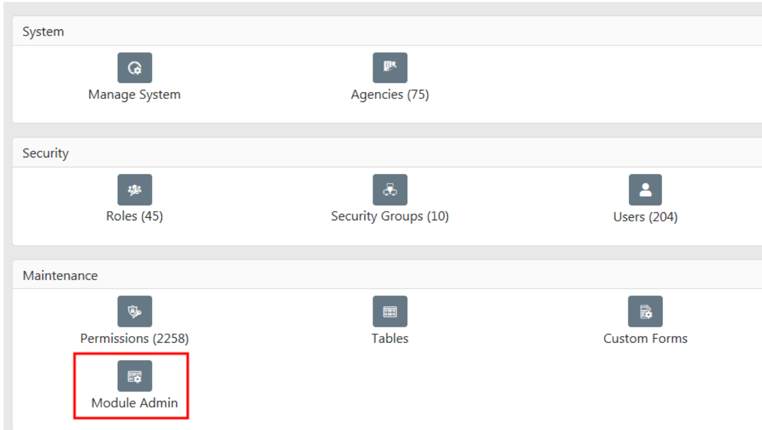
There are three new permissions categories beginning with the Online RMS 10.31 release:

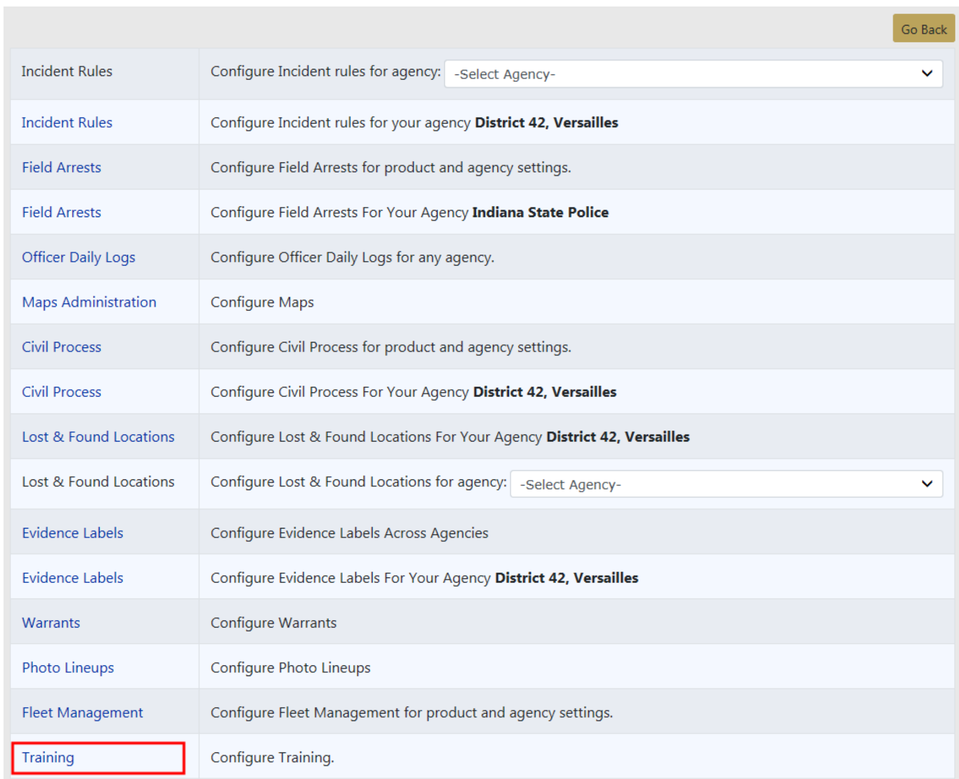
- Training - Schema Level Management (System Level)
- Training - Organization Level Management (Multi-tier Agency Level)
- Training - Agency Level Management

Note: The new permission categories are assigned to the *System_Admin*, *Organization_Admin*, and *Agency_Admin* roles, respectively, for the initial 10.31 release.

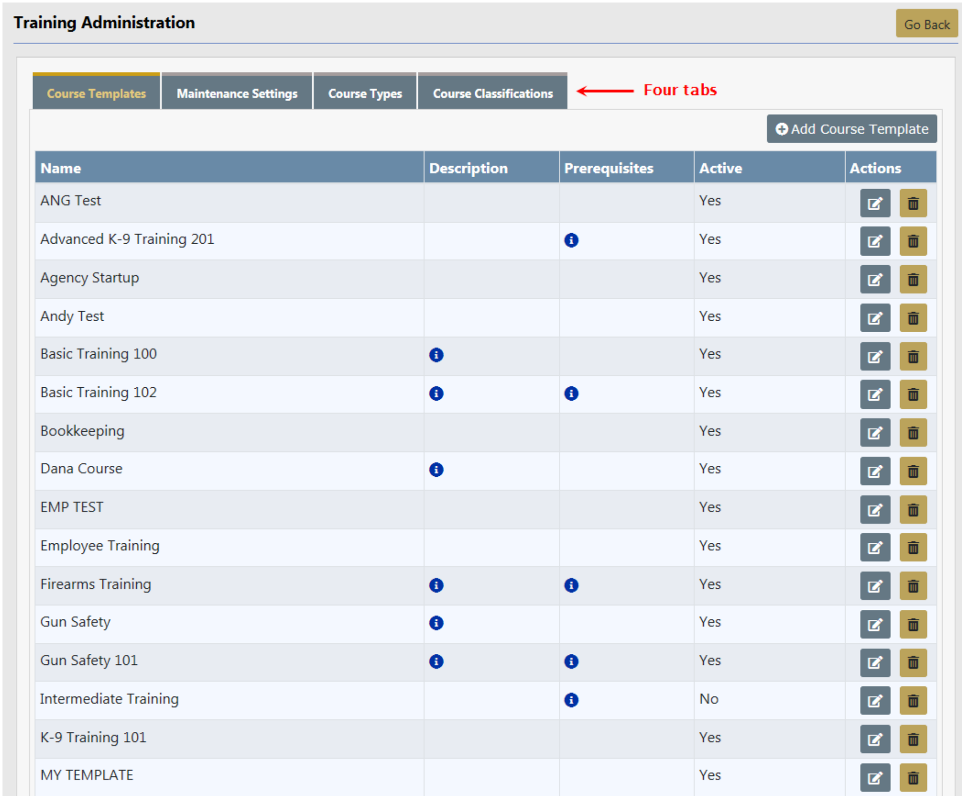
Access Course Configuration

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.





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



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.

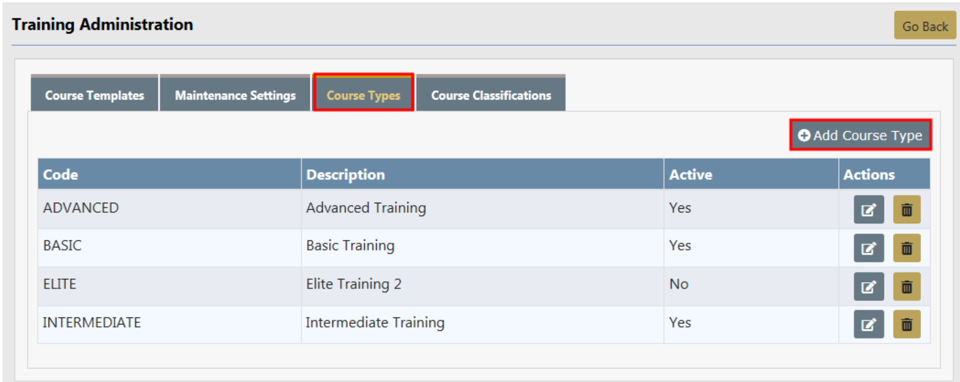
Note: The *Training Course Dashboard* and *Training Certification Dashboard* displays a list of Courses and Certifications that are due to expire within a specified number of days. For more information on the Training Dashboard refer to the *Training Module* section of the *Caliber Public Safety Online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

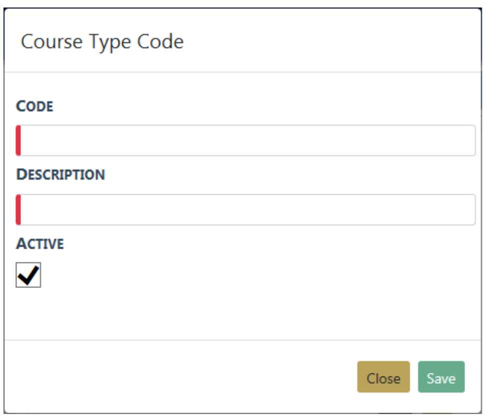
Add Course Type

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.



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.

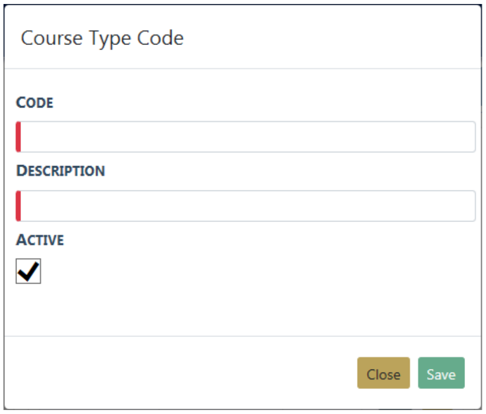
Note: The **Code** and **Description** fields are required.



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

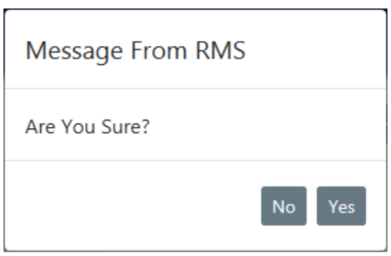
Update Course Type

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.



Delete Course Type

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

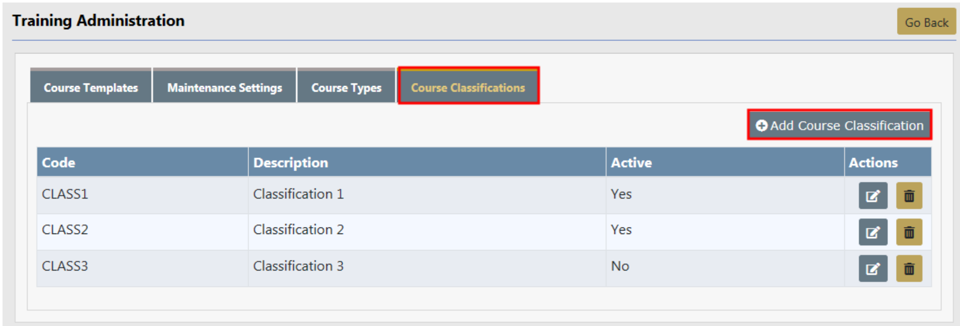


   a. If the *Course Type* is associated with a *Course Template* a message appears at the top of the screen stating it cannot be deleted. For more information on associating a Course Type with a Course Template refer to #CourseTemplates.

Course Classifications

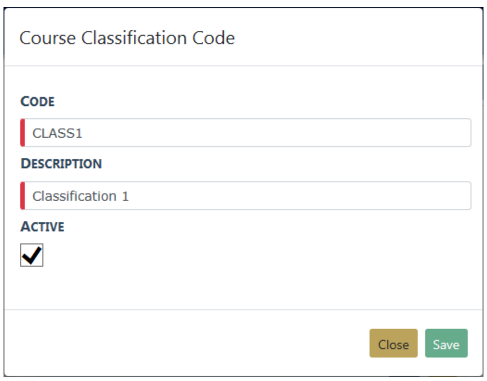
Add Course Classification

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.



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.

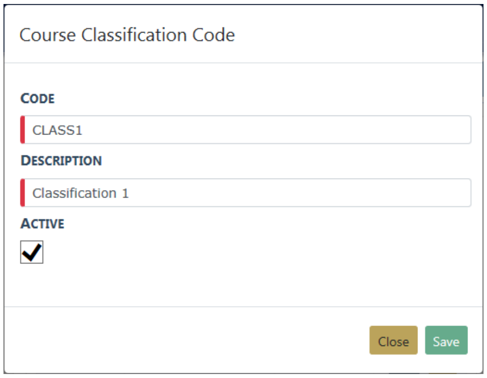


4. Click **Save** to create the *Course Classification Code*, or click **Close** to return to *Training Administration* without saving the new code.

Update Course Classification

1. Click the **Edit** icon  in the Action column on the *Course Classification* you want to update.

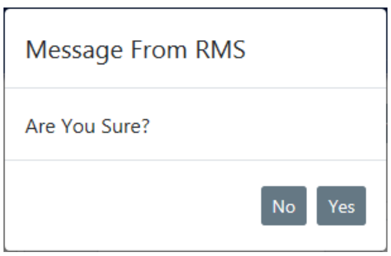
2. Make the necessary changes then click **Save**, or click **Close** to return to Training Administration without saving your changes.



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.



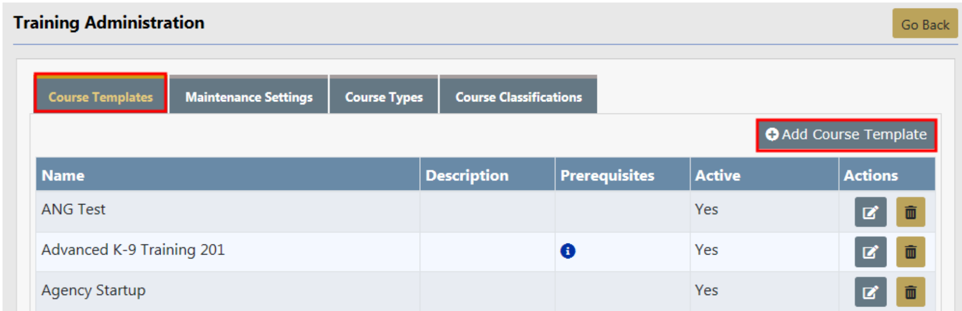
   a. If the *Course Classification* is associated with a *Course Template*, a message appears at the top of the screen stating it cannot be deleted. For more information on associating a Course Classification with a Course Template refer to #CourseTemplates.

Course Templates

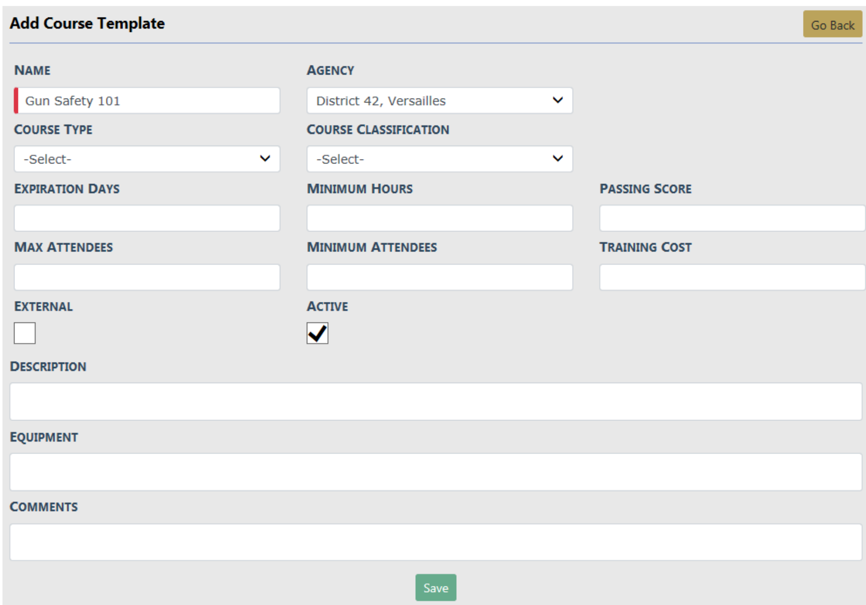
Add Template

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.

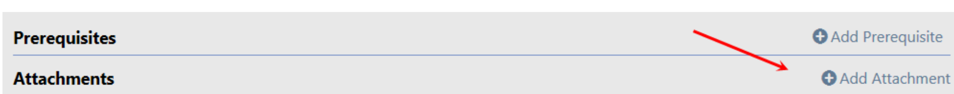
2. Click the **Add Course Template** link. to open the *Add Course Template* window.



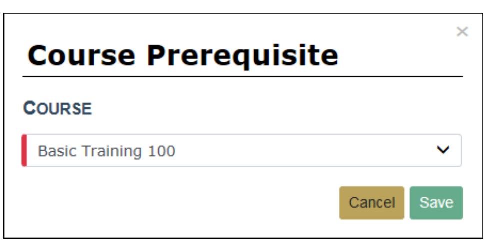
3. Enter the appropriate information in the fields provided then click **Save** to create the Course Template, or click **Back** to return to *Training Administration*.



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



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



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

a. The added prerequisites appear in the *Prerequisites* section of the *Edit Course Template*.

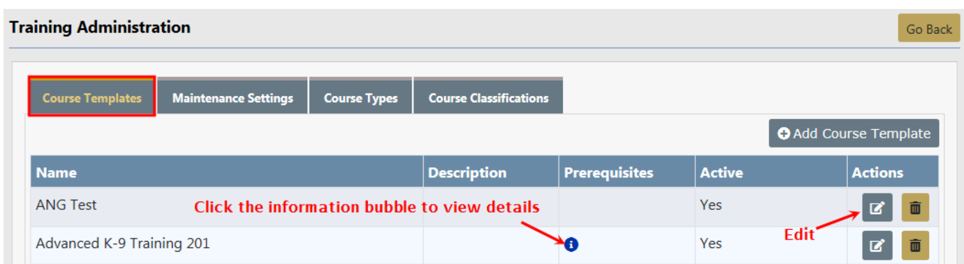
6. Optionally click **Add Attachment** to add course documents such as an outline and handouts. For more information on attachments, refer to "Attachments" on page 11.

Update Template

1. Click on the **Course Templates** tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 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 *Prerequisites* columns when details have been entered into these fields. Hover over the bubble to view a portion of the data, or click on the blue bubble to view the entire entry.



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.

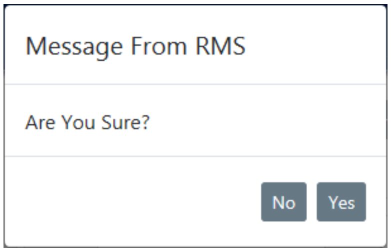
4. Click the **Back** button to return to the *Module Configuration* page.

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.



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.*

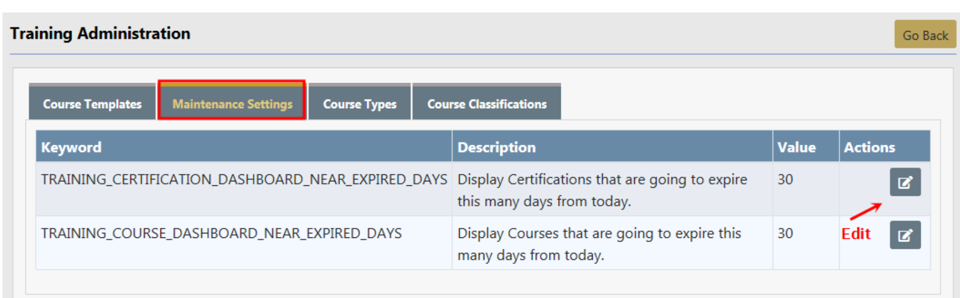
Maintenance Settings

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.

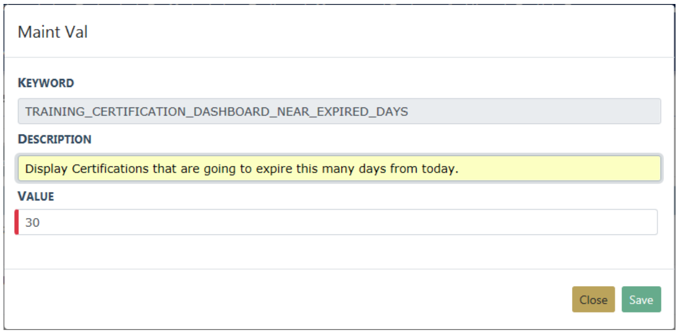
Set Number of Days Nearing Expiration

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.



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.



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.

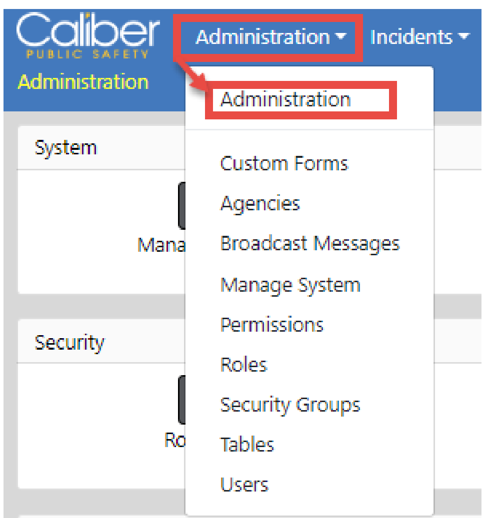
  Note: For more information on the **Training Video Library**, refer to the *Online RMS User Guide*.

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

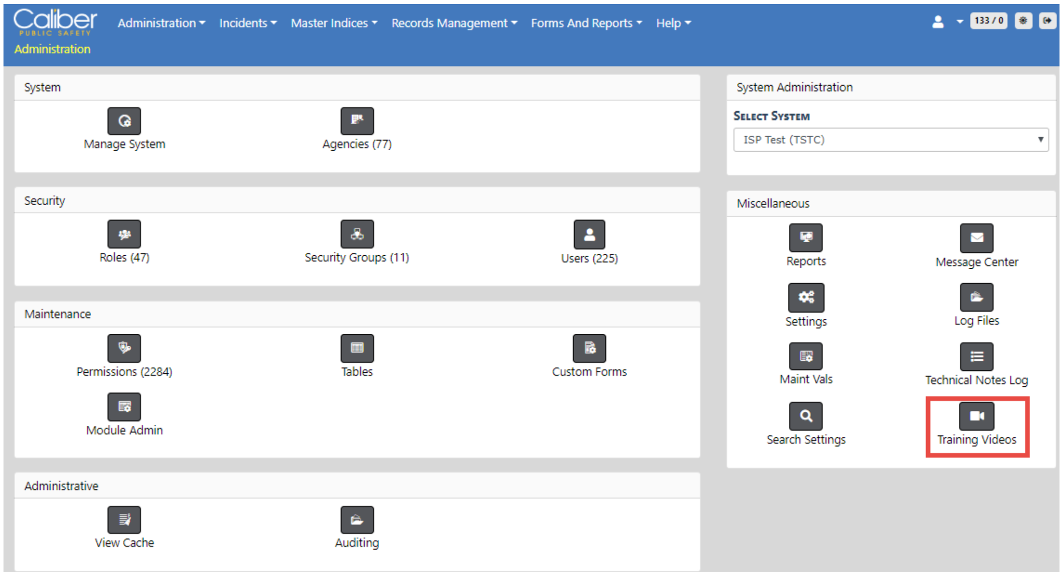
Access Training Videos

Follow these steps to access the **Training Videos** admin link:

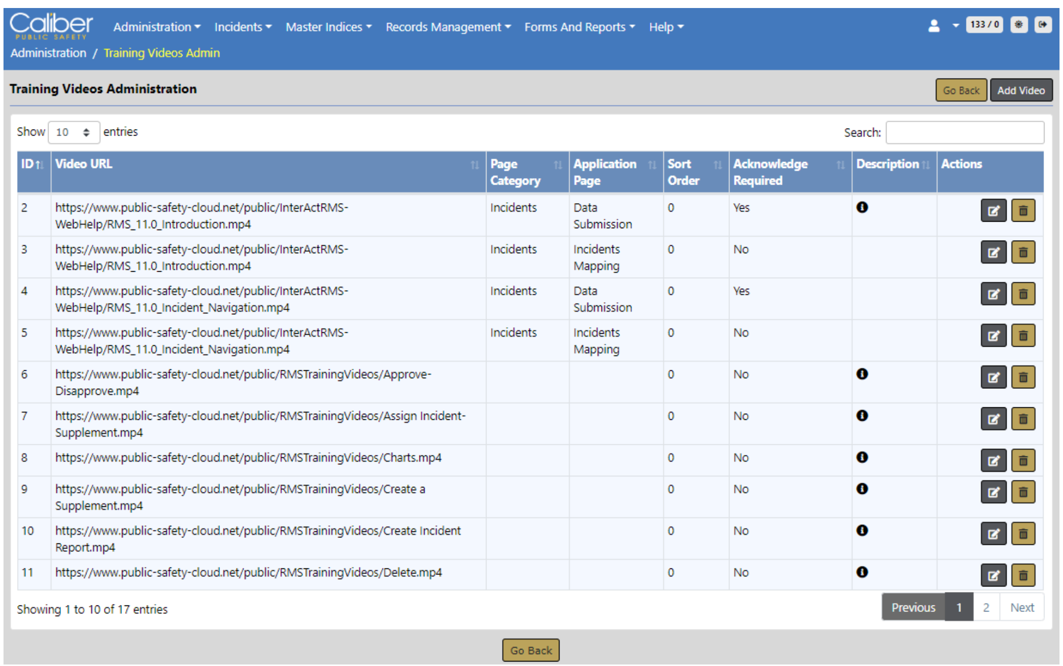
1. Click on the **Administration** label on the top menu bar then click **Administration** again.



2. Click on **Training Videos** under *Miscellaneous*.



3. The *Training Videos Administration* grid appears.

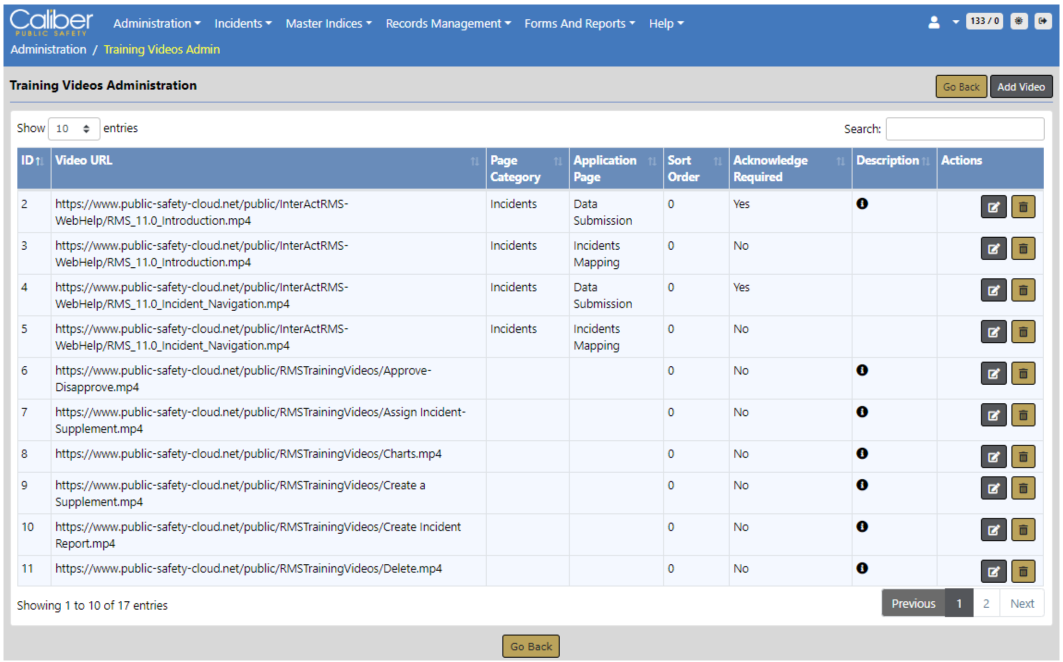


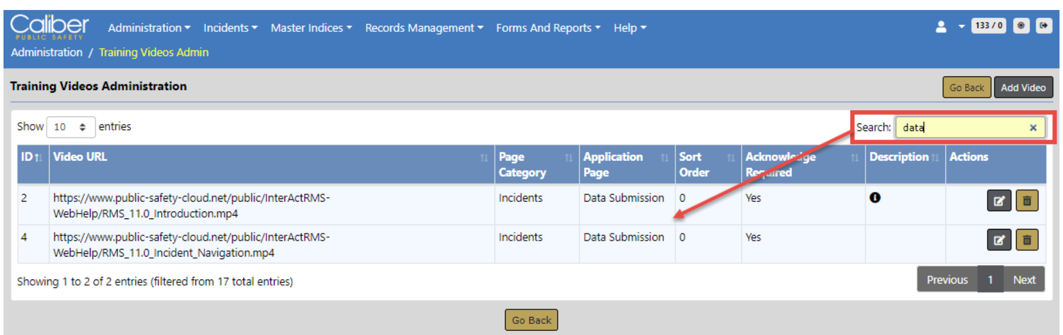
Search Training Videos

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.





Add Training Videos

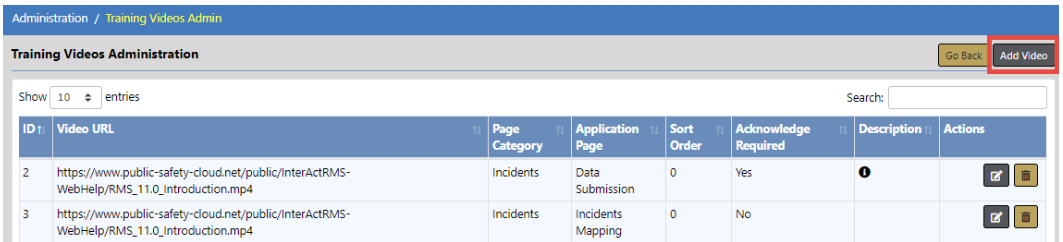
Follow these steps to add **Training Videos** to Online RMS:

Note: Contact Caliber Public Safety for video uploads.

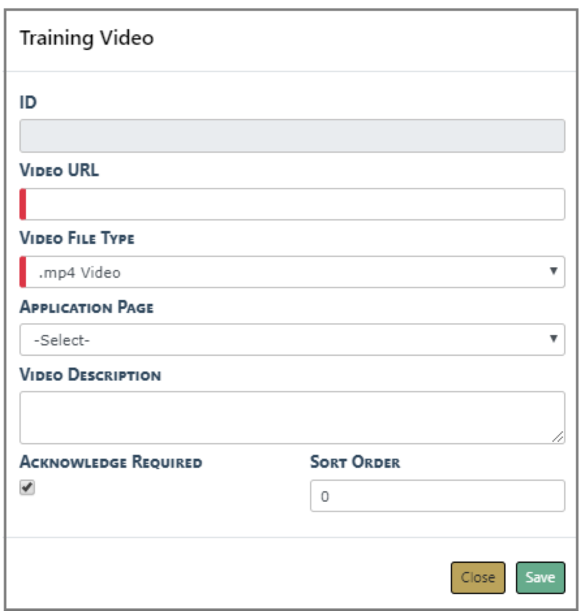
1. Access *Training Videos Administration*. For instructions, refer to “Access Training Videos” on page 164.

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.



4. The *Training Video* dialog box appears.



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

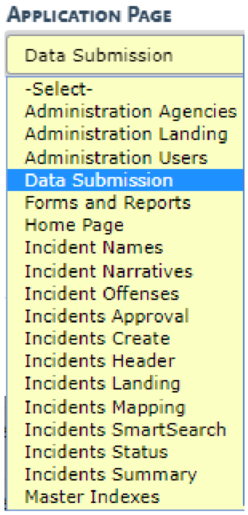
The URL to the video file. Contact Caliber Public Safety to add videos.

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.



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**.

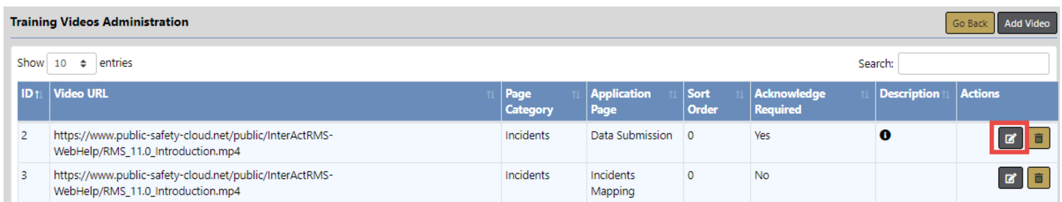
Edit Training Video

Follow these steps to add **Training Videos** to Online RMS:

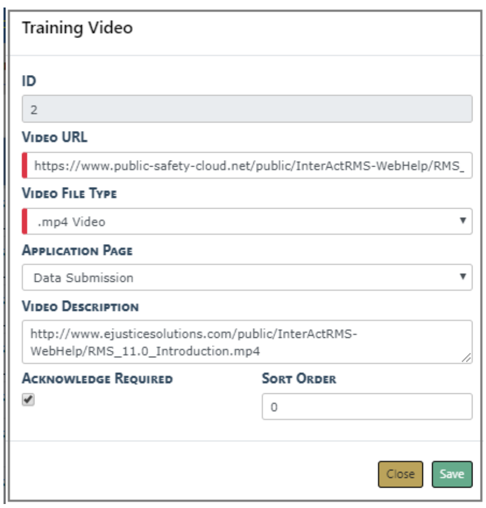
1. Access *Training Videos Administration*. For instructions, refer to “Access Training Videos” on page 164.

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.



4. The *Training Video* dialog box appears.



5. Update the values in the fields as needed:

ID

The ID is read-only. This number uniquely identifies the video and is generated automatically when you click the Save button.

Video URL

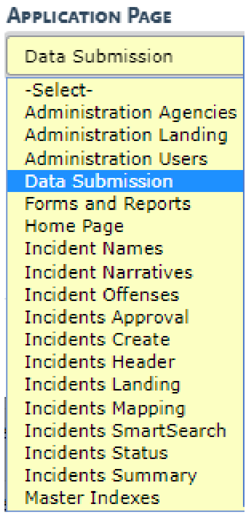
The URL to the video file. Contact Caliber Public Safety to add videos.

Video File Type

Online RMS supports only MP4 files at this time.

Application Page

Select the appropriate **Application Page** from the drop-down list provided.



Video Description

Enter a description for the video.

Acknowledge Required

Keep the box checked to require users to acknowledge having watched the video. The video continues to pop-up automatically each time you log into Online RMS and access a page to which the video is associated until you acknowledge having watched it. The date and time watched by the user is saved to the database on videos that are required.

Uncheck the box if users are not required to acknowledge having watched the video.

Sort Order

Enter the Sort Order if you want to sort the video list in a particular order. It sorts by ID by default.

6. Click **Save**.

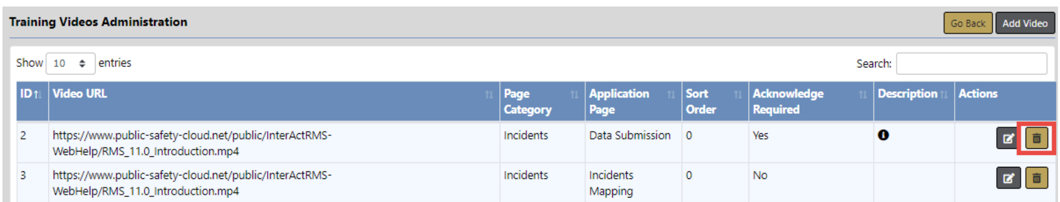
Delete Training Videos

Follow these steps to delete **Training Videos** from Online RMS:

1. Access *Training Videos Administration*. For instructions, refer to "Access Training Videos" on page 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.



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

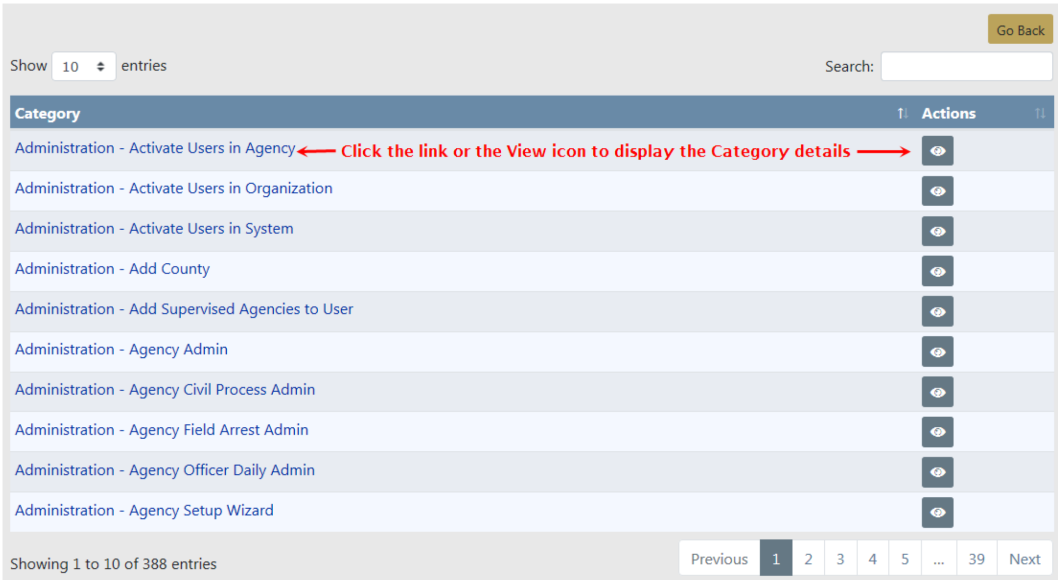
Permission Categories are assigned certain Roles, and Roles are assigned specific Permissions.

Click the **Permissions** icon on the *Administration Home* page to open the *Permission Categories* page. Alternatively, click the **Permissions** option on the **Administration** menu.

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

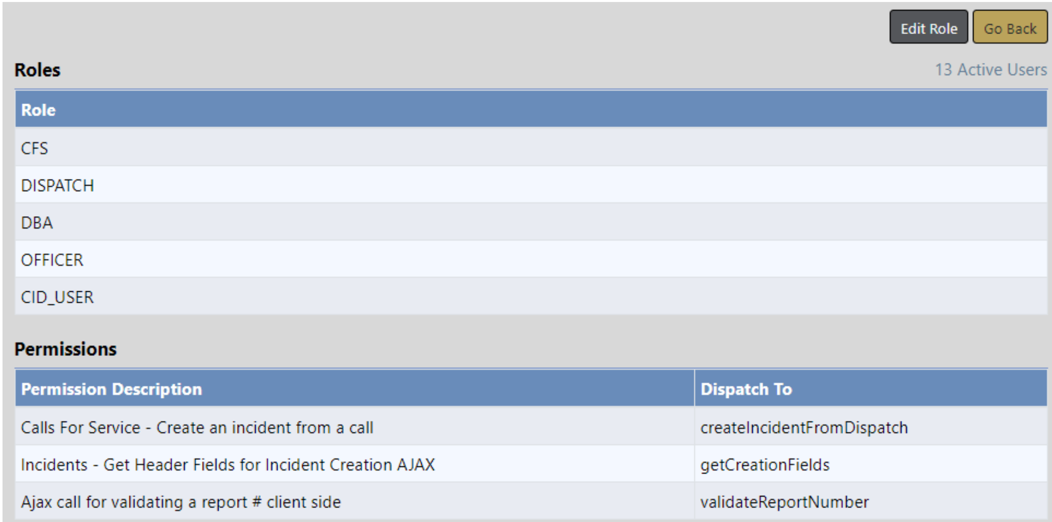
 in the **Actions** column or on the Category link to open the *Permission Category Details* page. With appropriate permissions you can also add one or more roles directly to a Permission Category.



Note: See "Permission Categories Details" below for more information.

Permission Categories Details

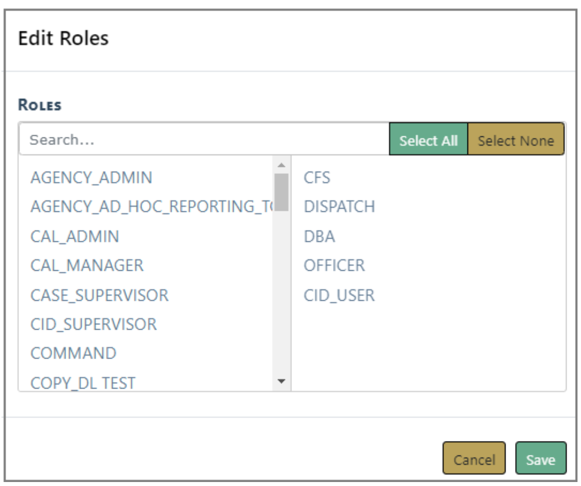
To view the Roles and Permission details associated with a particular **Permission Category**, locate the category to view, then either click the view icon in the **Actions** column or the Category link to open the *Permission Category Details*.



From this page, you can:

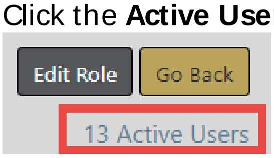
- View the Roles associated with this **Permission Category**.
- View a list of permissions that are associated with the Roles.
- Add one or more Roles directly to a permission category.

  Click the **Edit Role** button then select one or more Roles.



- View a list of active users that have one or more of the Roles listed.

  Click the **Active Users** link to view the active user list.



Note: For more information on Roles, see “Roles” on page 77 .

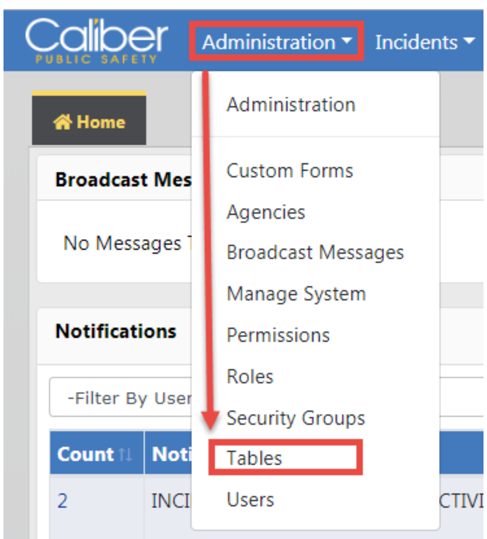
Chapter 14. Tables

Code Tables and RMS Tables are used throughout the Online RMS application by users with proper permissions and are maintained from the Tables page. Additional System Tables are available to Caliber Public Safety personnel only and are not available for general use.

Access Tables

Click the **Tables** icon on the *Administration Home* page to access the *Tables* page. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.

Alternatively, click on the **Administration** option on the top navigation bar to display the drop-down menu, then click **Tables**.



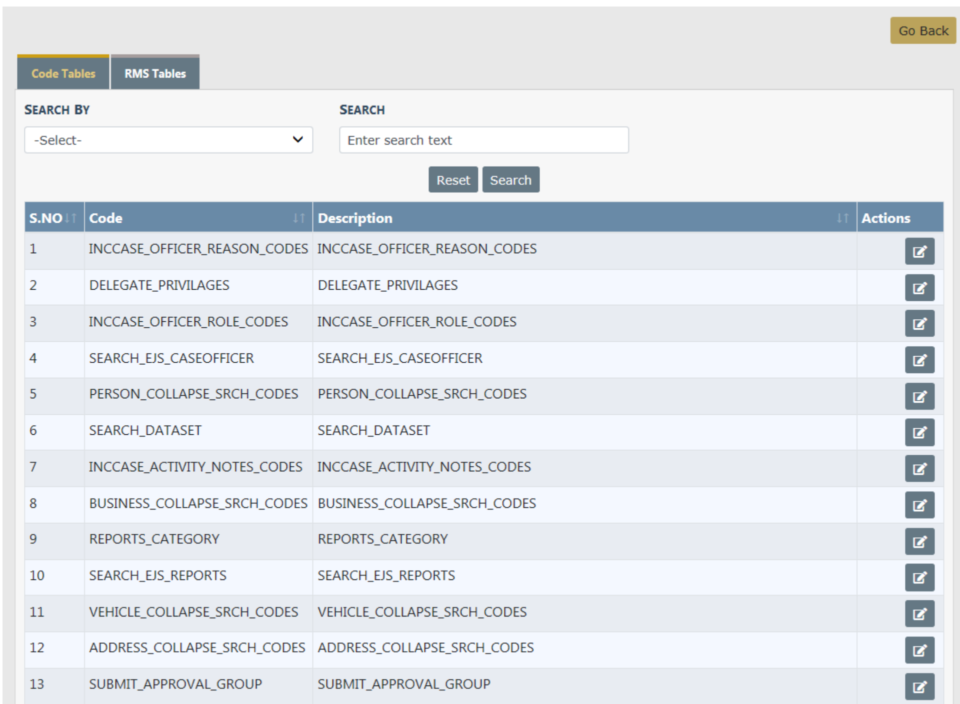
The **Tables** page opens with two tabs: *Code Tables* and *RMS Tables*.

Note: A *System Tables* tab is also available to Caliber Public Safety personnel only, for agency setup purposes.

- For information on **Code Tables** "Code Tables" below.
- For information on **RMS Tables** tab is the second tab. "RMS Tables" on page 182.

Code Tables

The **Code Tables** tab is open upon access of the *Tables* page.



The **Code Tables** tab displays a list of code tables that RMS uses to populate Lists of Values (LOV), or pick lists.

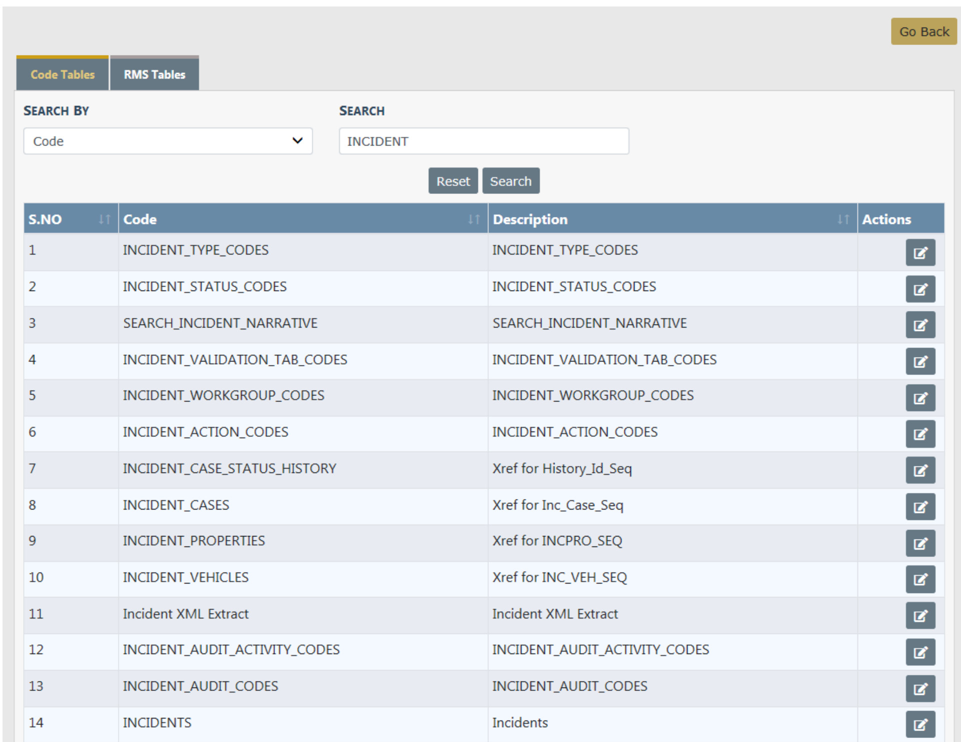
From this tab, administrative users with the appropriate roles/permissions can perform the following tasks:

- Search existing code tables. "Search Code Tables" on the facing page for instructions.
- Edit a code in a code table. For more information, refer to "Edit a Code Table" on the facing page for instructions.

Search Code Tables

Use the following procedure to search the **Code Tables**.

1. Click in the **Search By** field.
2. Select from the drop-down. (Available options include: Code, Description, and Table Name.)
3. Click in the **Search** text field and type in a keyword.
4. Click the **Search** button to redisplay the table as shown below for a search for *codes* with the key word *INCIDENT*.



S.NO	Code	Description	Actions
1	INCIDENT_TYPE_CODES	INCIDENT_TYPE_CODES	
2	INCIDENT_STATUS_CODES	INCIDENT_STATUS_CODES	
3	SEARCH_INCIDENT_NARRATIVE	SEARCH_INCIDENT_NARRATIVE	
4	INCIDENT_VALIDATION_TAB_CODES	INCIDENT_VALIDATION_TAB_CODES	
5	INCIDENT_WORKGROUP_CODES	INCIDENT_WORKGROUP_CODES	
6	INCIDENT_ACTION_CODES	INCIDENT_ACTION_CODES	
7	INCIDENT_CASE_STATUS_HISTORY	Xref for History_Id_Seq	
8	INCIDENT_CASES	Xref for Inc_Case_Seq	
9	INCIDENT_PROPERTIES	Xref for INCPRO_SEQ	
10	INCIDENT_VEHICLES	Xref for INC_VEH_SEQ	
11	Incident XML Extract	Incident XML Extract	
12	INCIDENT_AUDIT_ACTIVITY_CODES	INCIDENT_AUDIT_ACTIVITY_CODES	
13	INCIDENT_AUDIT_CODES	INCIDENT_AUDIT_CODES	
14	INCIDENTS	Incidents	

Codes containing the keyword display.

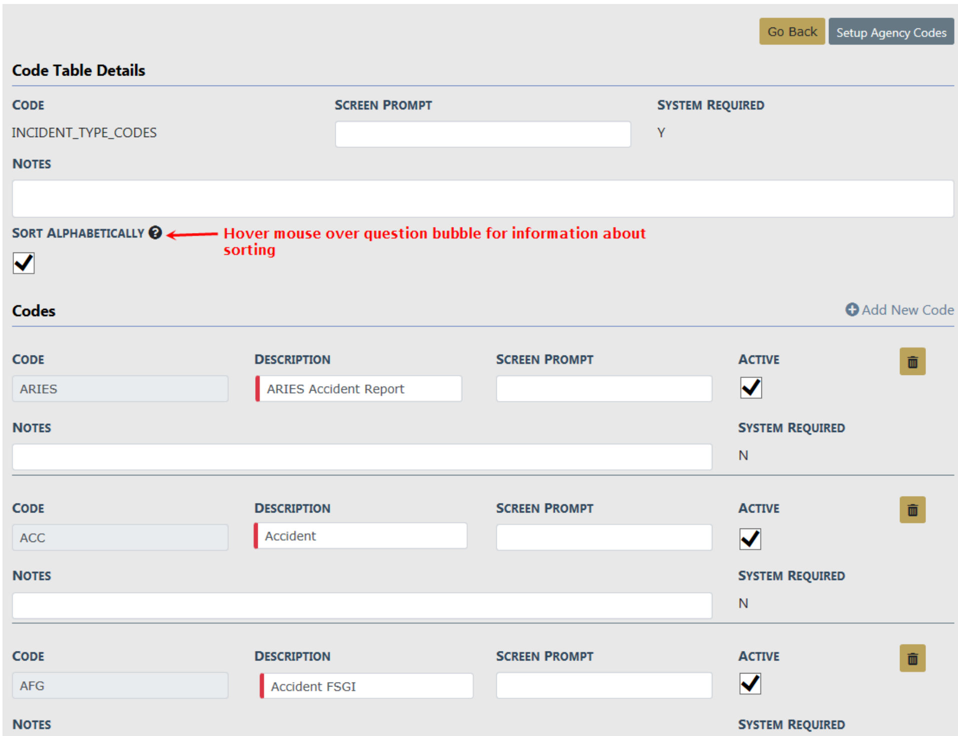
5. Navigate to the Next page as needed until you locate the specific code.

Edit a Code Table

Use the following procedure to edit a code table.

1. Locate the code table on the *Tables* page. Refer to "Code Tables" on page 178 for details.

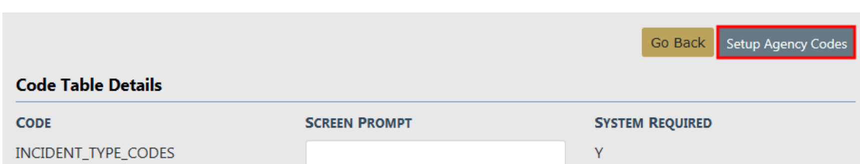
2. Click in the **Actions** column to display *Code Table Details*.

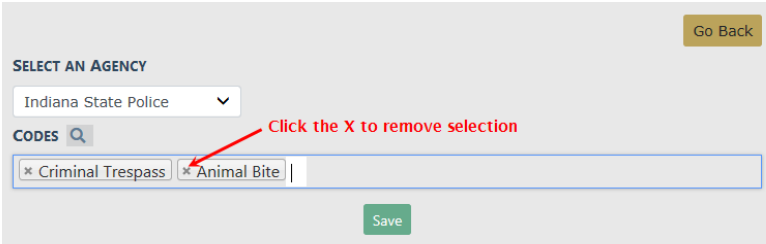


3. Click the **Add New Code** link to add a code that has been setup, or update existing entries as needed.

4. Click on the **Delete** icon to remove a code from the list.

5. Click the **Setup Agency Codes**s button on the top right of the page to include Agency Codes. **Select an Agency** from the list, then click into the **Codes** field and select one or more codes to add them to the **Codes** field.





Click **Save**, then click **Go Back** to return to the *Code Table Details* page.

6. To delete a code from the code table, refer to "Delete a Code" below.

7. Click **Save** at the bottom of the page to save changes and return to the *Tables* page.

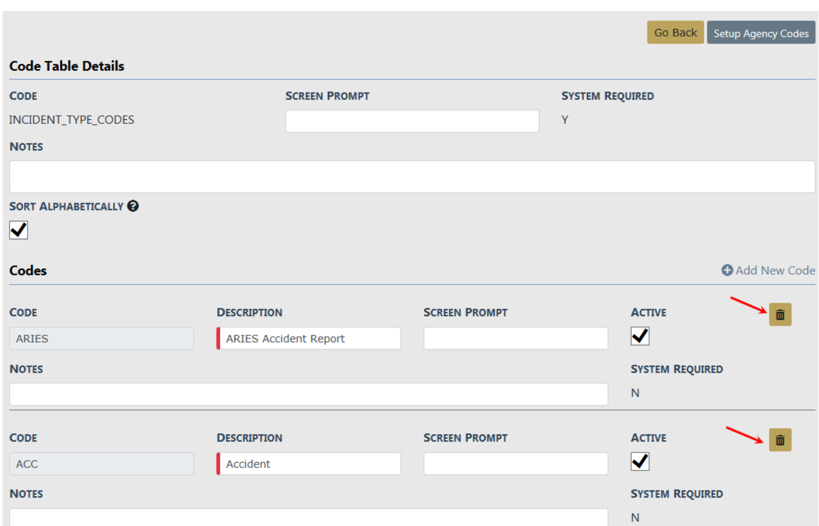
Delete a Code

Use the following procedure to delete a code from a code table.

1. Locate the code table on the *Tables* page. Refer to "Code Tables" on page 178 for details.

2. Click  in the **Actions** column to display the *Edit Code Table*. Refer to "Edit a Code Table" on page 179 for details.

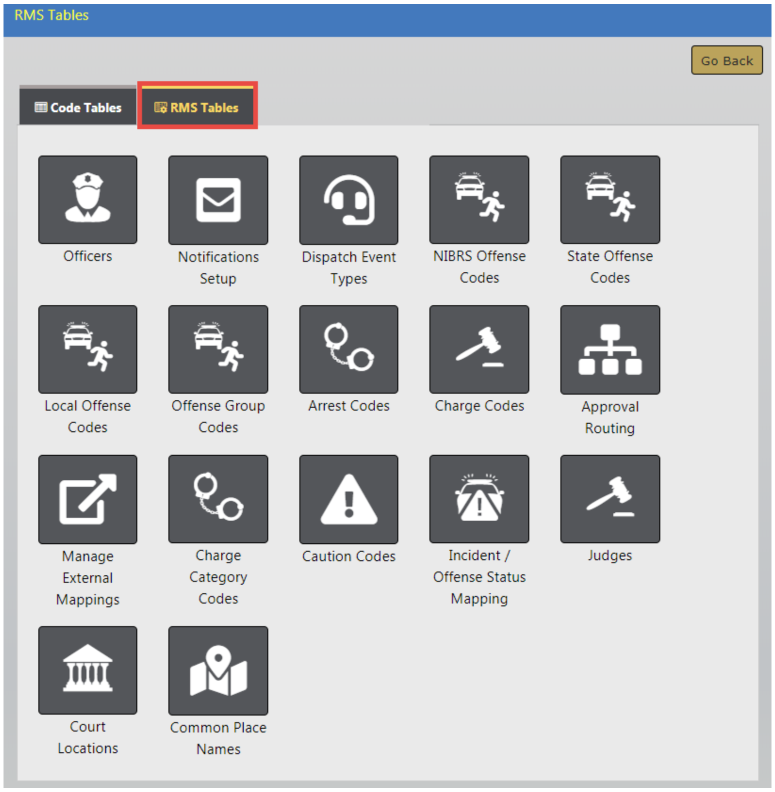
3. Locate the code you want to delete then click  to the right of the code.



4. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Tables* page.

RMS Tables

From the *Tables* page, click the **RMS Tables** tab to display the *Tables* page. For details on how to access the Tables page refer to "Access Tables" on page 177.



Each icon on this page provides links to an **RMS Table**.

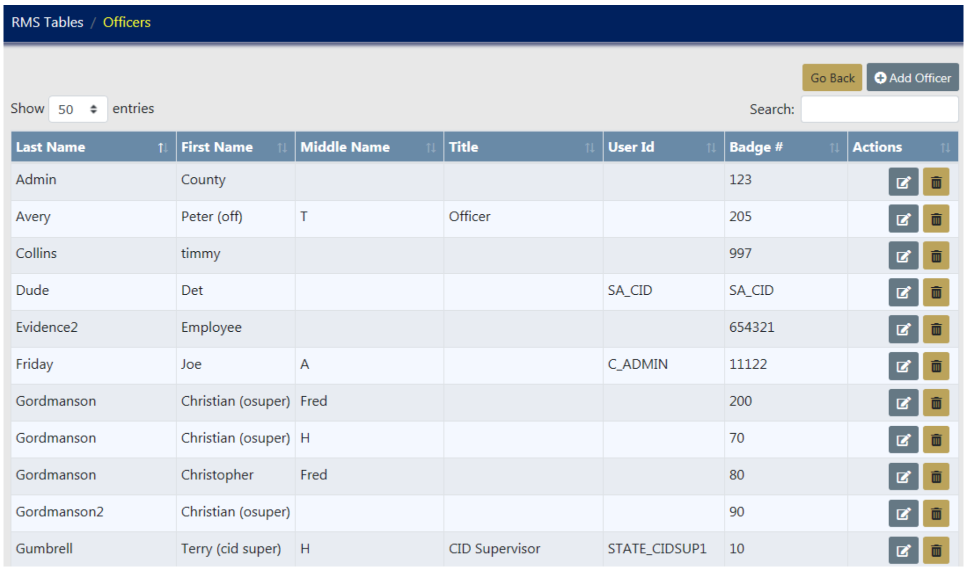
Note: Links are permission-based, so the list varies by user. If you do not see a particular link on the **RMS Tables** tab, it is likely because your user account is not configured to access that item.

- 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.



Last Name	First Name	Middle Name	Title	User Id	Badge #	Actions
Admin	County				123	
Avery	Peter (off)	T	Officer		205	
Collins	timmy				997	
Dude	Det			SA_CID	SA_CID	
Evidence2	Employee				654321	
Friday	Joe	A		C_ADMIN	11122	
Gordmanson	Christian (osuper)	Fred			200	
Gordmanson	Christian (osuper)	H			70	
Gordmanson	Christopher	Fred			80	
Gordmanson2	Christian (osuper)				90	
Gumbrell	Terry (cid super)	H	CID Supervisor	STATE_CIDSUP1	10	

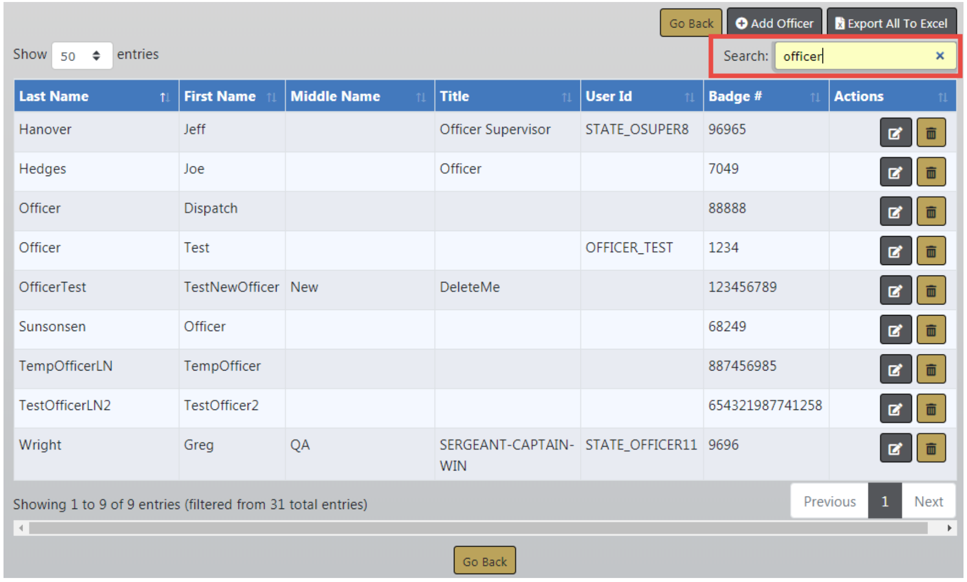
Export Officer List to Excel

You can export the contents of the Officer Table to Excel. Click on the **Export All To Excel** button to download the Excel file to your local machine.

Search Officers

Use the following procedure to search the *Officers* table.

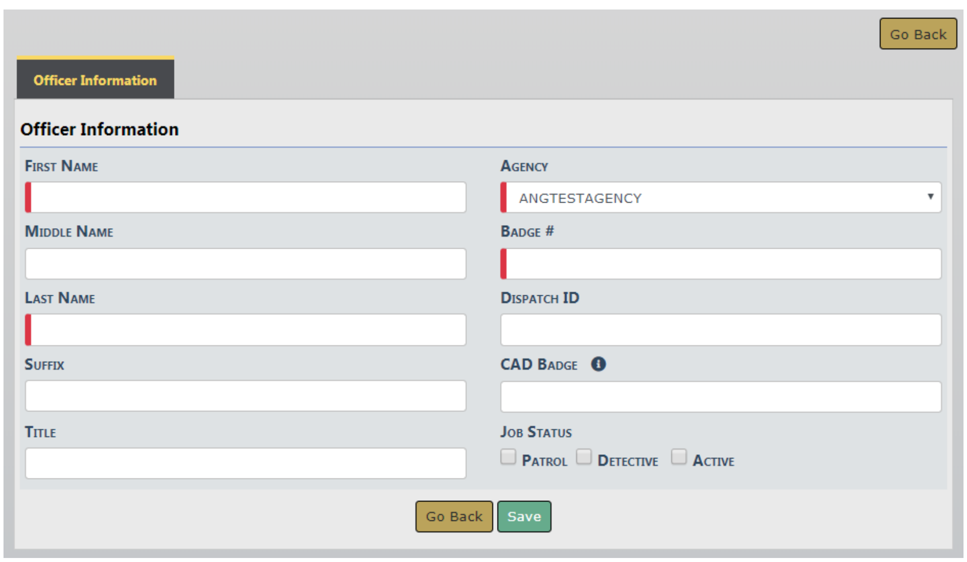
1. Click in the **Search** text field and type in a keyword.
2. The search results automatically return records where data matches the text you typed in the Search field.



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.



2. Complete all required fields and optional fields as applicable.

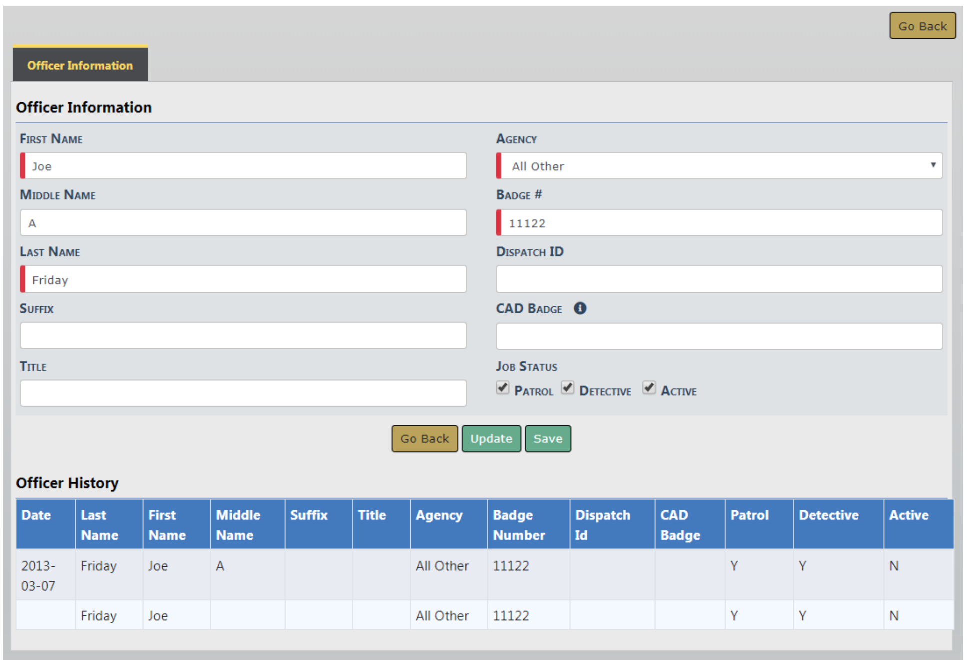
3. Click all **Job Status** check boxes that apply to this officer.

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 History appears on the bottom portion of the screen showing updates that have occurred to that particular record. Officer History does not appear if updates to the record have not yet occurred.

3. Make changes as needed, clicking **Save** as needed to prevent loss of changes.
4. When changes are complete, click **Update** to save the record and return to the *Officers* table.

Delete an Officer

Use the following procedure to delete an officer record from the *Officers* table.

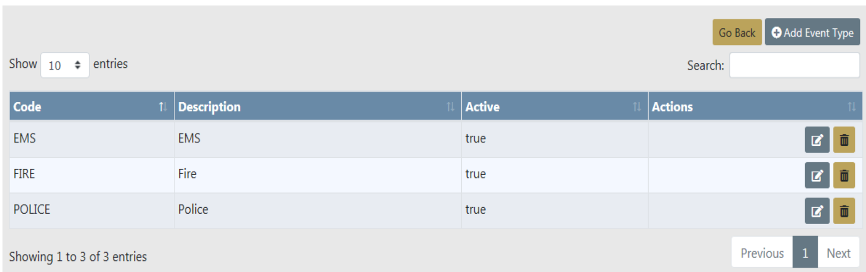
1. Locate the officer record you need to delete from the table.

2. Click in the **Actions** column in the same row as the record listing to display the confirm deletion prompt.

3. Confirm deletion and return to the *Officers* table.

Dispatch Event Types

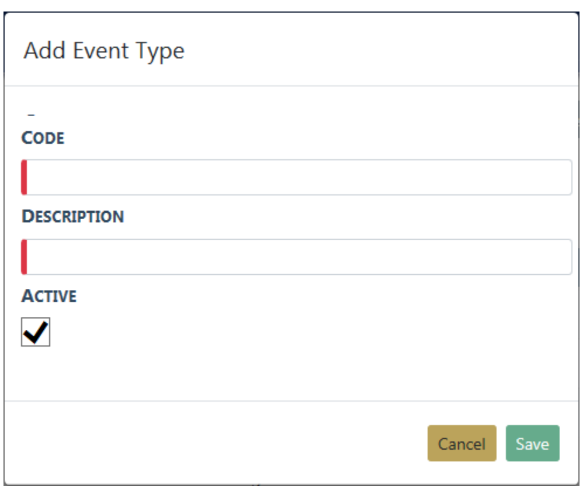
From the **RMS Tables** tab of the *Tables* page, click the Dispatch Event Types link to display the *Dispatch Event Types* table. For details on how to access the *Tables* page refer to "Access Tables" on page 177.



Add a Dispatch Event Type

Use the following procedure to add a dispatch event type record to the *Dispatch Events Types* table.

1. Click the **Add Event Type** button to display an *Add Event Type* prompt as shown.



2. Click in the **Code** field and type a code for the new dispatch event type.

3. Click in the **Description** field and type a brief description of the new dispatch event type.

4. Leave the **Active** button checked.

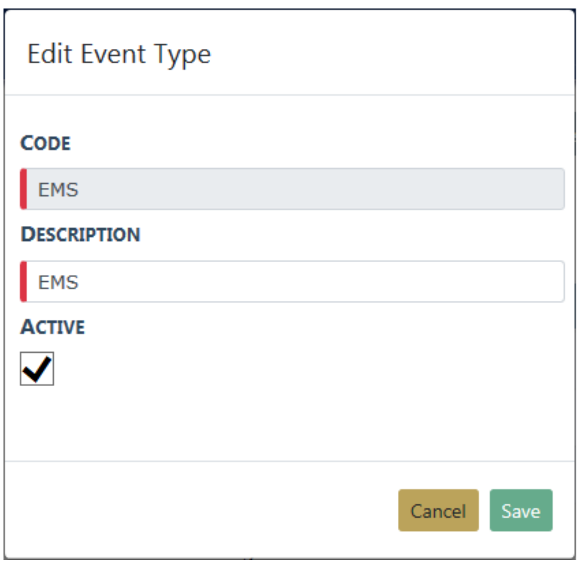
5. Click **Save** to save the record and return to the *Dispatch Events Types* table, or click **Cancel** to return without saving.

Edit a Dispatch Event Type

Use the following procedure to edit a dispatch event type record in the *Dispatch Event Types* table.

1. Locate the record you need to edit in the table.

2. Click  in the **Actions** column in the same row as the record listing to display the *Add Event Type* prompt as shown with values in the fields and check box.



3. Make changes as needed, then click **Save** to save the changes,and return to the *Dispatch Event Types* table.

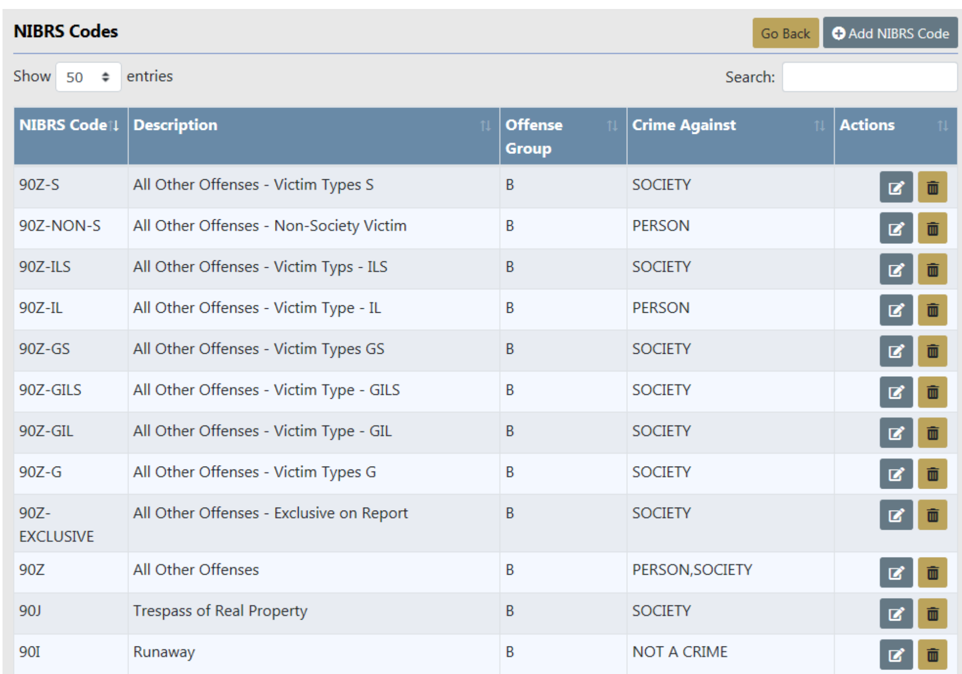
Delete a Dispatch Event Type

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.

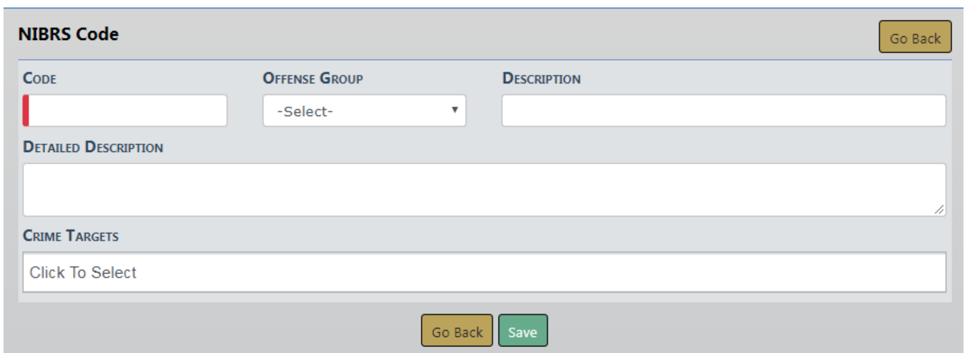
1. Click in the **Search** text field and type in a keyword.

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.



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.

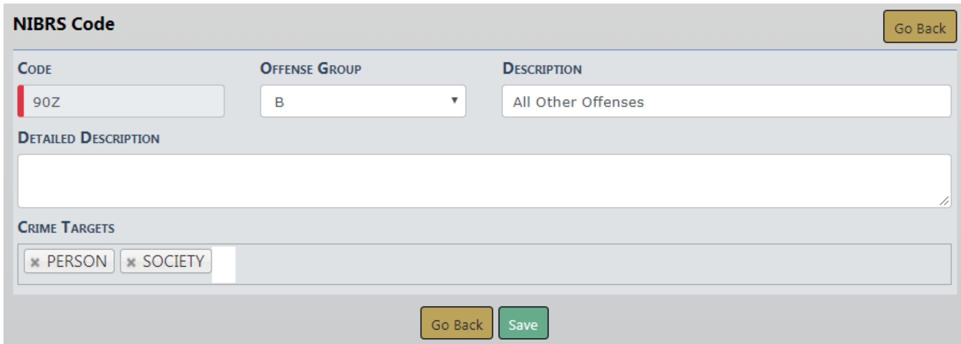
7. Click **Save** to save the record and return to the *NIBRS Codes* table.

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.

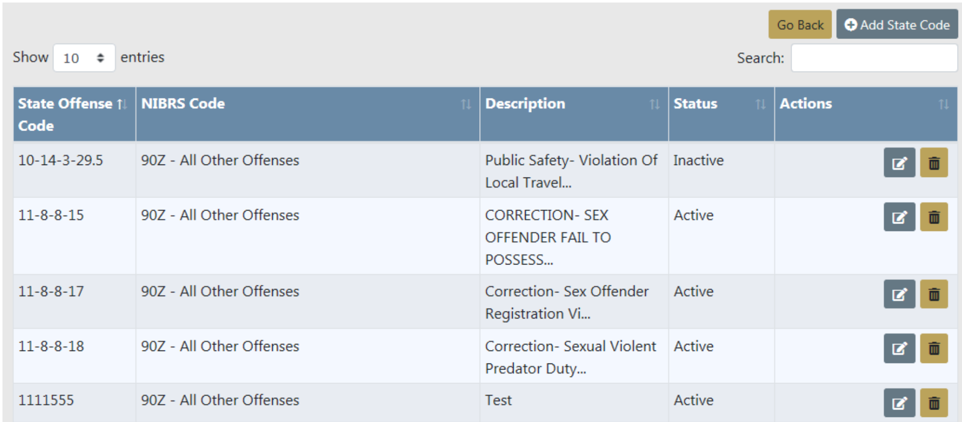
1. Locate the NIBRS code record you need to delete from the table.

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.



Search State Offense Codes

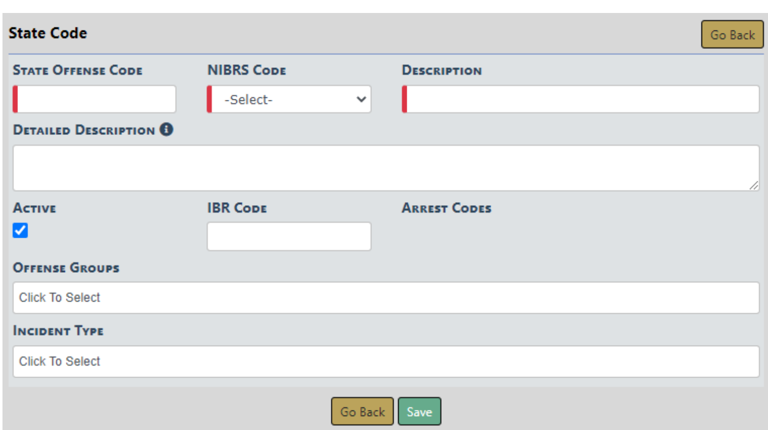
Use the following procedure to search the *State Offense Codes* table.

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.



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.

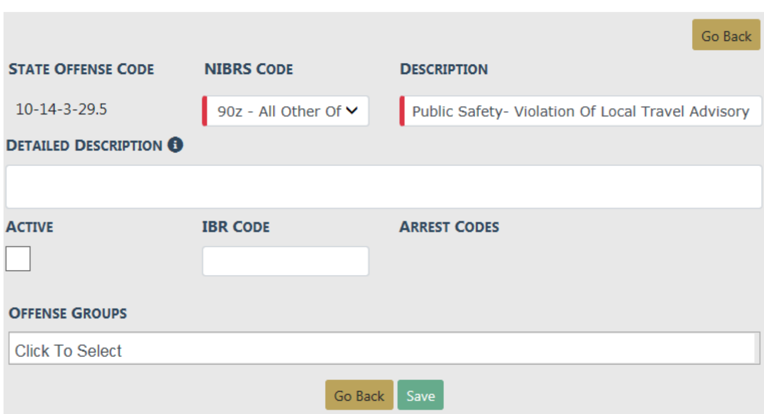
7. Click **Save** to save the record and return to the *State Offense Codes* table.

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.



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.

Go Back | Add Local Offense Code | Print

Show 10 entries Search:

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

Showing 1 to 9 of 9 entries Previous 1 Next

Search Local Offense Codes

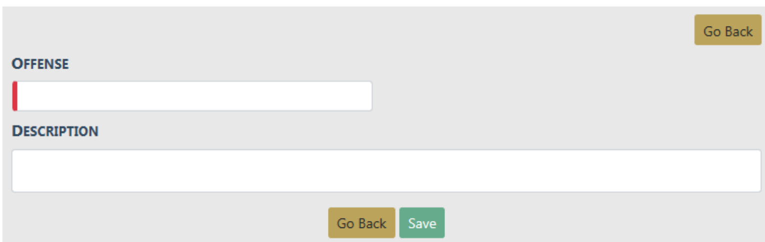
Use the following procedure to search the *Local Offense Codes* table.

1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

Add a Local Offense Code

Use the following procedure to add a local offense code to the *Local Offense Codes* table.

1. Click the **Add Local Offense Code** button to display the *Add Local Offense Code* page as shown below.

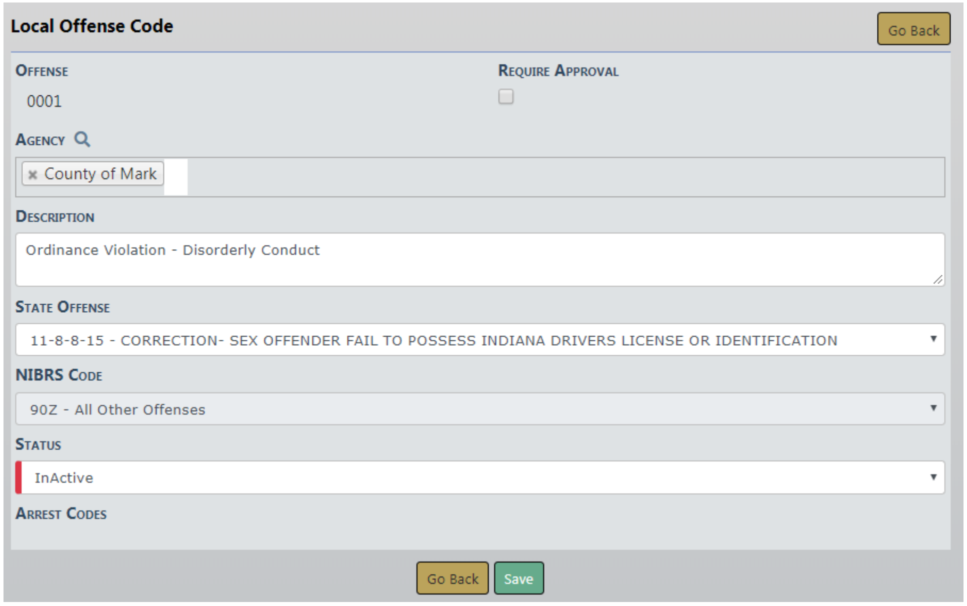


2. Complete fields.
3. Click **Save** to save the record and return to the *Local Offense Codes* table.

Edit a Local Offense Code

Use the following procedure to edit a local offense code in the *Local Offense Codes* table.

1. Locate the code you need to edit in the table.
2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Local Offense Code* page as shown.



3. Make changes as needed.
4. Click **Save** to save changes and return to the *Local Offense Codes* table.

Delete a Local Offense Code

Use the following procedure to delete a local offense code from the *Local Offense Codes* table.

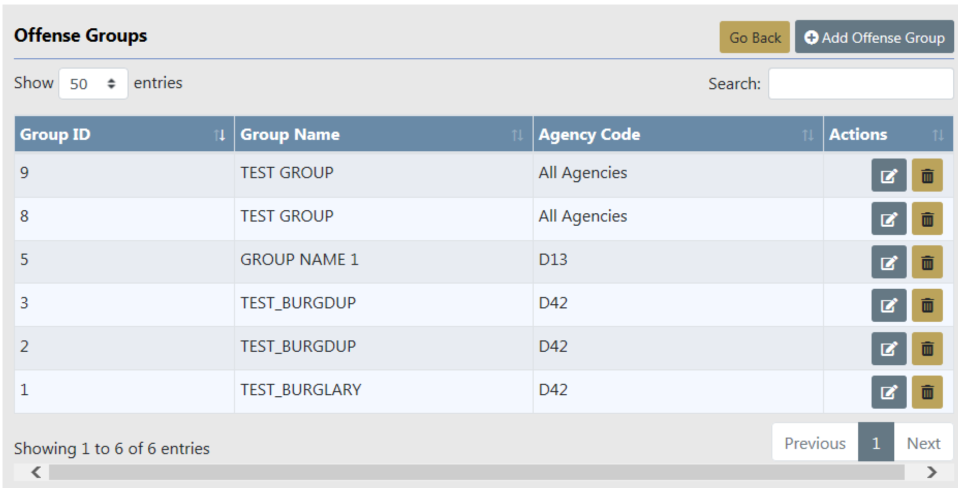
1. Locate the code you need to delete from the table.
2. Click in the **Actions** column to display a confirmation prompt.

   Note: A confirmation prompt displays only if the code is not associated with an incident report. Otherwise, the following message displays: This offense cannot be removed because it is associated with one or more incident reports. You may edit this offense and set it to inactive. To inactivate the code, access the *Edit Local Offense Code* page and select **Inactive** from the drop-down menu in the **Status** field, then click **Save**.

3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Local Offense Codes* table.

Offense Group

From the **RMS Tables** tab of the *Tables* page, click the Offense Group Code link to display the *Offense Group Codes* table. For instructions on accessing the *Tables* page refer to AccessTables.htm.



Search Offense Groups

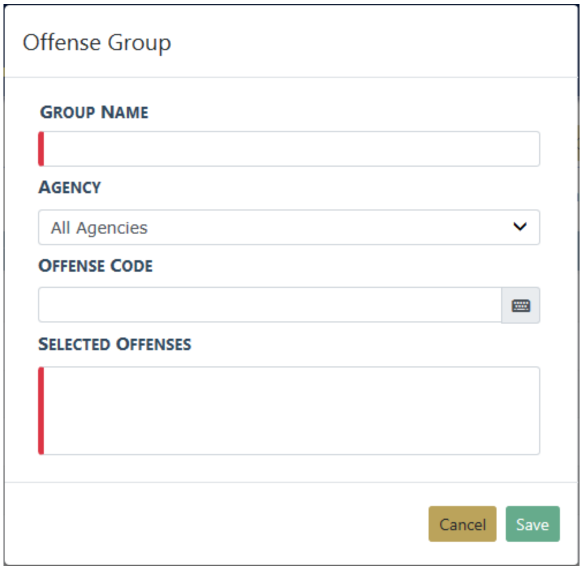
Use the following procedure to search the *Offense Groups* table.

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.



2. Complete fields.

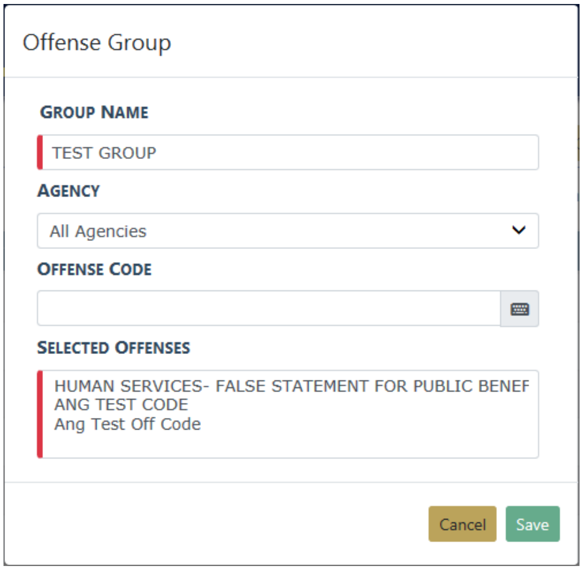
3. Click **Save** to save the record and return to the *Offense Groups* table.

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.



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.

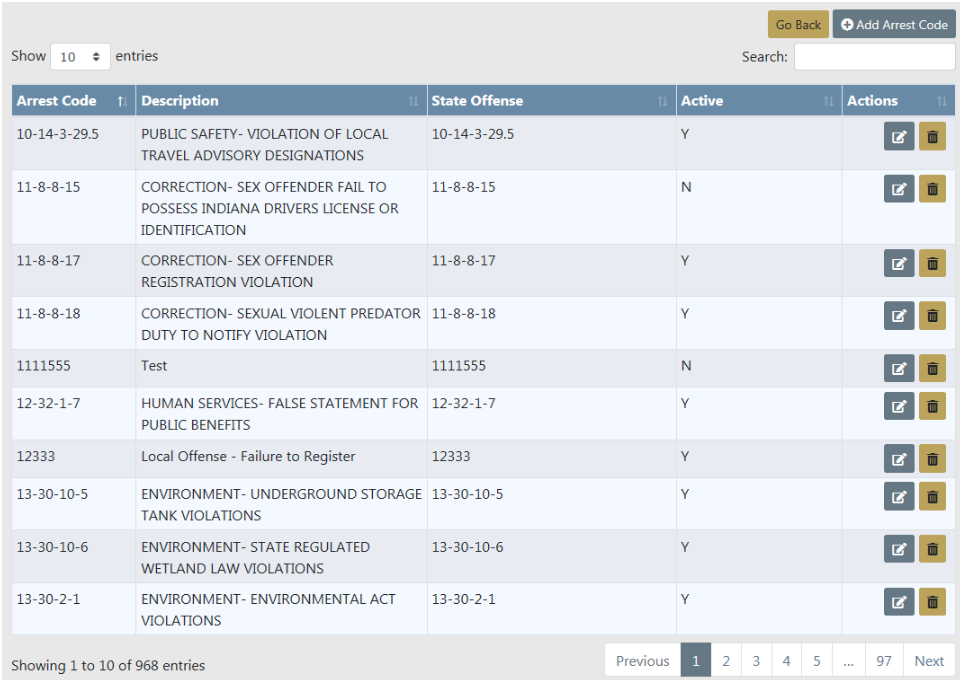
1. Locate the code you need to delete from the table.

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.



Go Back | Add Arrest Code

Show 10 entries Search:

Arrest Code	Description	State Offense	Active	Actions
10-14-3-29.5	PUBLIC SAFETY- VIOLATION OF LOCAL TRAVEL ADVISORY DESIGNATIONS	10-14-3-29.5	Y	
11-8-8-15	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15	N	
11-8-8-17	CORRECTION- SEX OFFENDER REGISTRATION VIOLATION	11-8-8-17	Y	
11-8-8-18	CORRECTION- SEXUAL VIOLENT PREDATOR DUTY TO NOTIFY VIOLATION	11-8-8-18	Y	
1111555	Test	1111555	N	
12-32-1-7	HUMAN SERVICES- FALSE STATEMENT FOR PUBLIC BENEFITS	12-32-1-7	Y	
12333	Local Offense - Failure to Register	12333	Y	
13-30-10-5	ENVIRONMENT- UNDERGROUND STORAGE TANK VIOLATIONS	13-30-10-5	Y	
13-30-10-6	ENVIRONMENT- STATE REGULATED WETLAND LAW VIOLATIONS	13-30-10-6	Y	
13-30-2-1	ENVIRONMENT- ENVIRONMENTAL ACT VIOLATIONS	13-30-2-1	Y	

Showing 1 to 10 of 968 entries Previous 1 2 3 4 5 ... 97 Next

Search Arrest Charge Codes

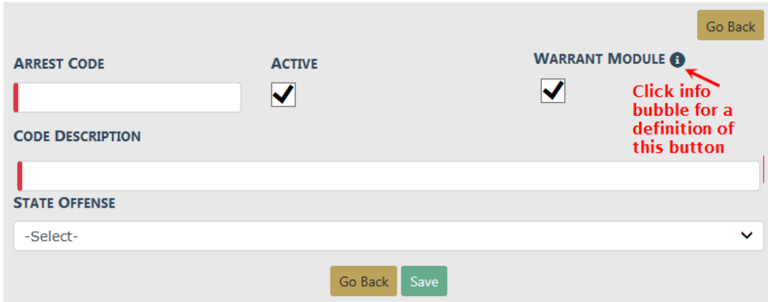
Use the following procedure to search the *Arrest Charge Codes* table.

1. Click in the **Search** text field and type in a keyword.
2. Click **Search** to redisplay the table with the search results.

Add an Arrest Charge Code

Use the following procedure to add an arrest charge code to the *Arrest Charge Codes* table.

1. Click the **Add Arrest Code** button in the upper right corner of the *Arrest Charge Codes* table to display an *Add Arrest Charge Code* page as shown below.



2. Complete required fields and applicable optional fields. Any field with a red left-hand border is a required field. You must complete required fields to continue.

3. Select the Warrant Module button to allow this arrest code to be used in the Warrant module. The button is green when selected, or gray when deselected.

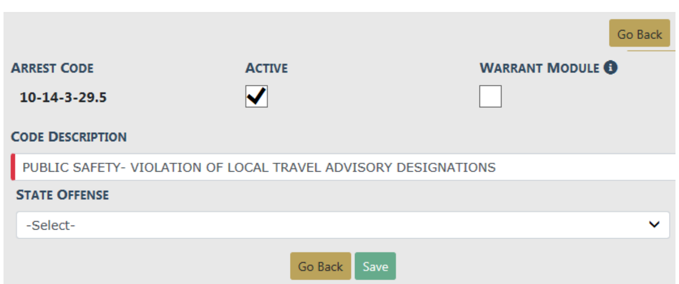
4. Click **Save** to save the record and return to the *Arrest Charge Codes* table.

Edit an Arrest Charge Code

Use the following procedure to edit an arrest charge code in the *Arrest Charge Codes* table.

1. Locate the arrest charge code you need to edit in the table.

2. Click  in the **Actions** column in the same row as the record listing to display the *Edit Arrest Charge Code* page as shown.



3. Make changes as needed.

4. Click **Save** to save the record and return to the *Arrest Charge Codes* table.

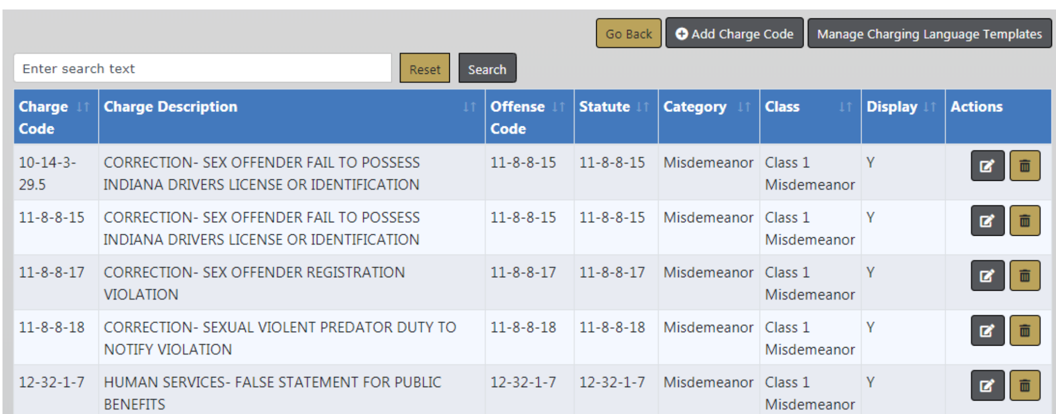
Delete an Arrest Charge Code

Use the following procedure to delete an arrest charge code from the *Arrest Charge Codes* table.

1. Locate the record you need to delete from the table.
2. Click in the **Actions** column.
3. Click **Yes** to confirm deletion, or click **No** to return to the *Arrest Charge Codes* table without deleting.

Charge Codes

From the **RMS Tables** tab of the *Tables* page, click the Charge Codes link to display the *Charge Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 177.



Charge Code	Charge Description	Offense Code	Statute	Category	Class	Display	Actions
10-14-3-29.5	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15	11-8-8-15	Misdemeanor	Class 1 Misdemeanor	Y	
11-8-8-15	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15	11-8-8-15	Misdemeanor	Class 1 Misdemeanor	Y	
11-8-8-17	CORRECTION- SEX OFFENDER REGISTRATION VIOLATION	11-8-8-17	11-8-8-17	Misdemeanor	Class 1 Misdemeanor	Y	
11-8-8-18	CORRECTION- SEXUAL VIOLENT PREDATOR DUTY TO NOTIFY VIOLATION	11-8-8-18	11-8-8-18	Misdemeanor	Class 1 Misdemeanor	Y	
12-32-1-7	HUMAN SERVICES- FALSE STATEMENT FOR PUBLIC BENEFITS	12-32-1-7	12-32-1-7	Misdemeanor	Class 1 Misdemeanor	Y	

Search Charge Codes

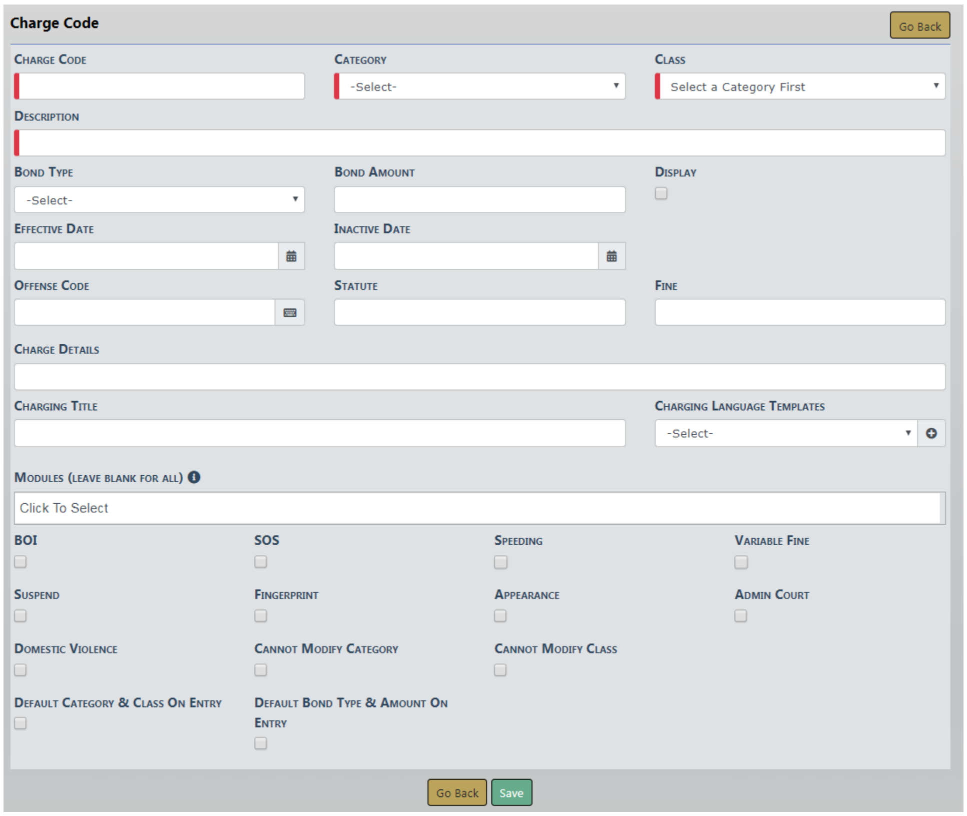
Use the following procedure to search the *Charge Codes* table.

1. Type a keyword in the **Search** text box in the upper right of the form.
2. Click **Search** to redisplay the table with the search results that match your entered text.

Add a Charge Code

Use the following procedure to add a charge code to the *Charge Codes* table.

1. Click the **Add Charge Code** button in the upper right of the *Charge Codes* table to display a *Add Charge Code* page as shown below.



2. Complete all required fields and any applicable optional fields.

3. Check all boxes that apply to this charge code.

   Note: The **Display** check box must be checked for the charge code to display throughout areas of Online RMS where charge codes pulled-in.

4. Click **Save** to save the record and return to the *Charge Codes* table.

Edit a Charge Code

Use the following procedure to edit a charge code in the *Charge Codes* table.

1. Locate the record you need to edit in the table.

2. Click in the **Actions** column in the same row as the record listing to display the *Edit Charge Code* page.

3. Make changes as needed.

4. Click **Save** to save changes and return to the *Charge 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.

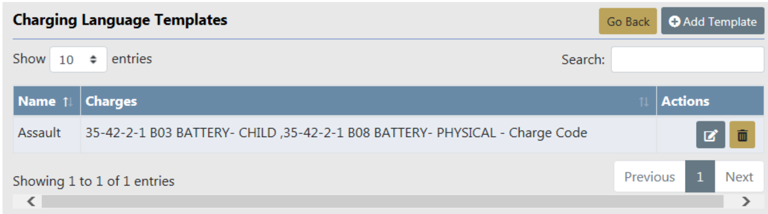
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Charge Codes* table.

Manage Charging Language Templates

Use the following procedure to manage charging language templates.

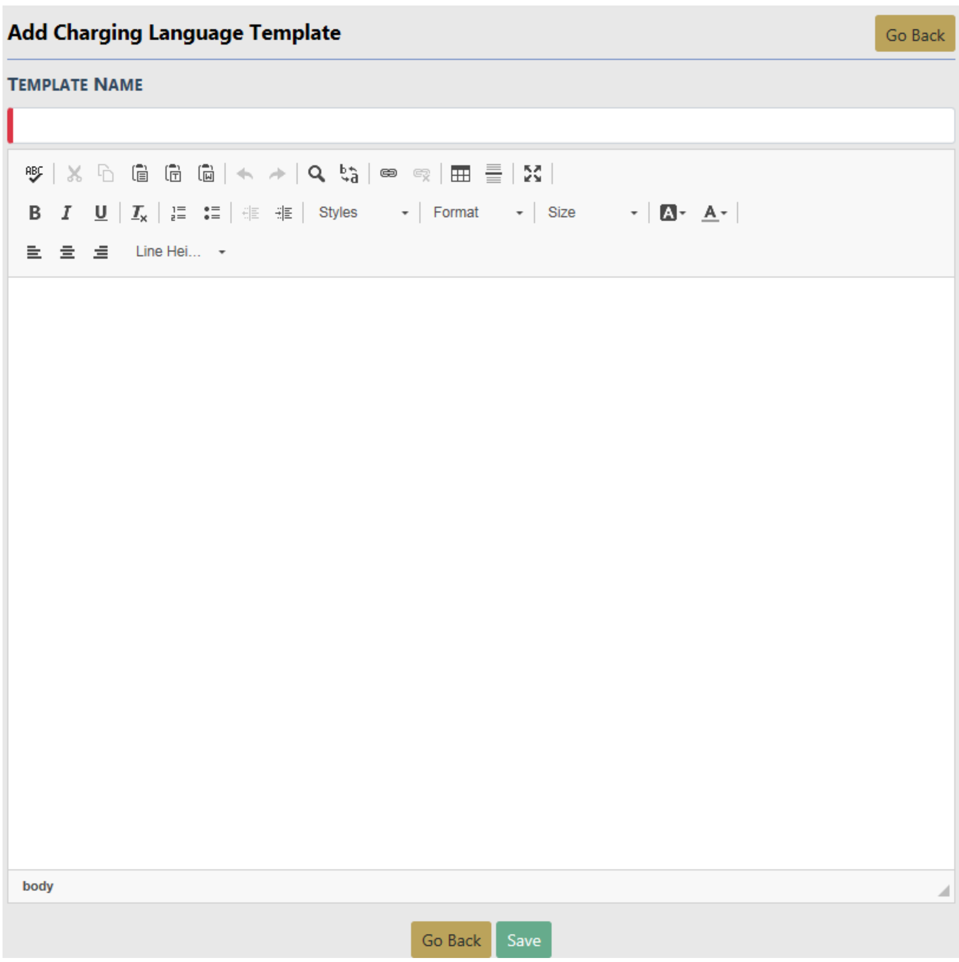
> **Note:** You must have appropriate permissions to perform this function.

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.



Add Template

1. Click the **Add Template** button to open the *Add Charging Language Template* form.



2. Enter a unique **Template Name**.

3. Enter text into the body area of the template, optionally using the standard formatting options.

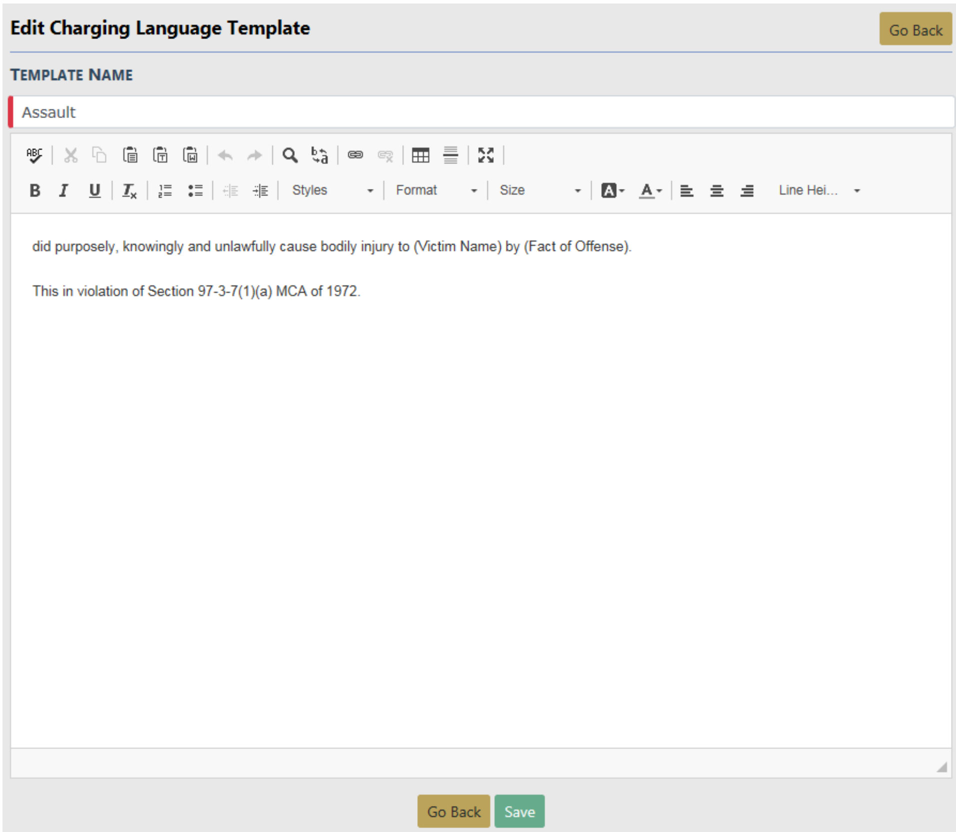
4. Click **Save** to create the template and return to *Charging Language Template*.

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.

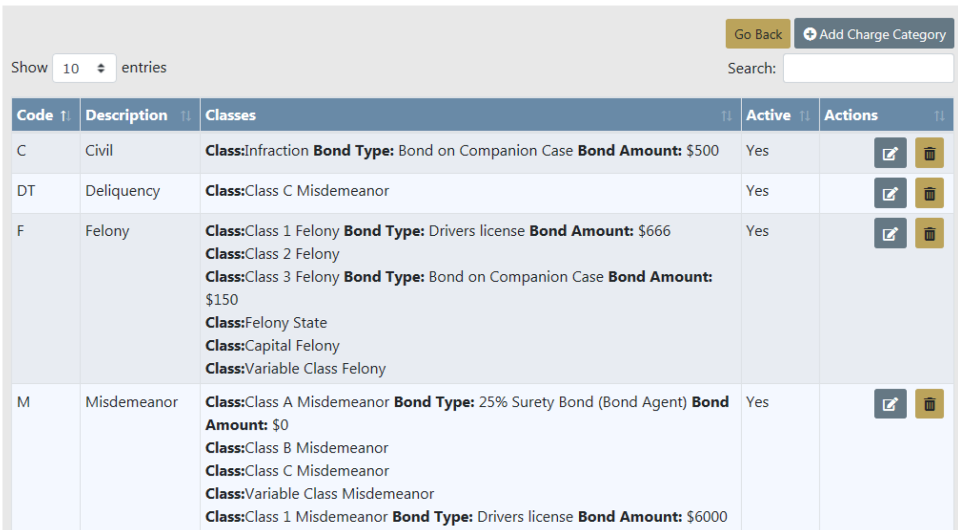
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Charging Language Template*.

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.


Go Back | Add Charge Category

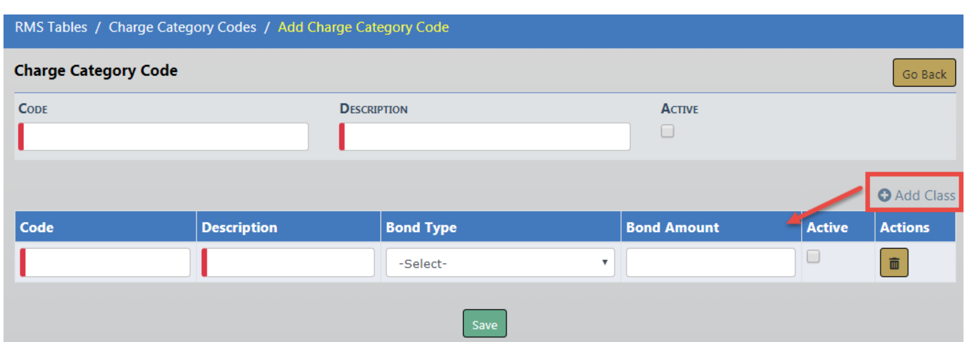
Show 10 entries Search:

Code	Description	Classes	Active	Actions
C	Civil	**Class:**Infraction **Bond Type:** Bond on Companion Case **Bond Amount:** $500	Yes	
DT	Deliquency	**Class:**Class C Misdemeanor	Yes	
F	Felony	**Class:**Class 1 Felony **Bond Type:** Drivers license **Bond Amount:** $666 **Class:**Class 2 Felony **Class:**Class 3 Felony **Bond Type:** Bond on Companion Case **Bond Amount:** $150 **Class:**Felony State **Class:**Capital Felony **Class:**Variable Class Felony	Yes	
M	Misdemeanor	**Class:**Class A Misdemeanor **Bond Type:** 25% Surety Bond (Bond Agent) **Bond Amount:** $0 **Class:**Class B Misdemeanor **Class:**Class C Misdemeanor **Class:**Variable Class Misdemeanor **Class:**Class 1 Misdemeanor **Bond Type:** Drivers license **Bond Amount:** $6000	Yes	

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.



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.

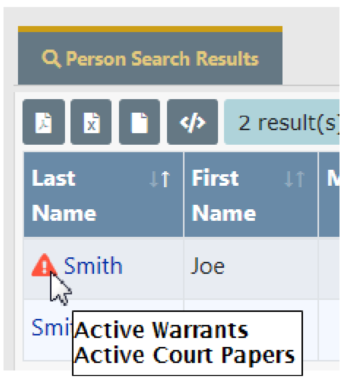
Note: You cannot delete a charge category that has been used in Online RMS. To disable the charge category, uncheck the **Active** check box.

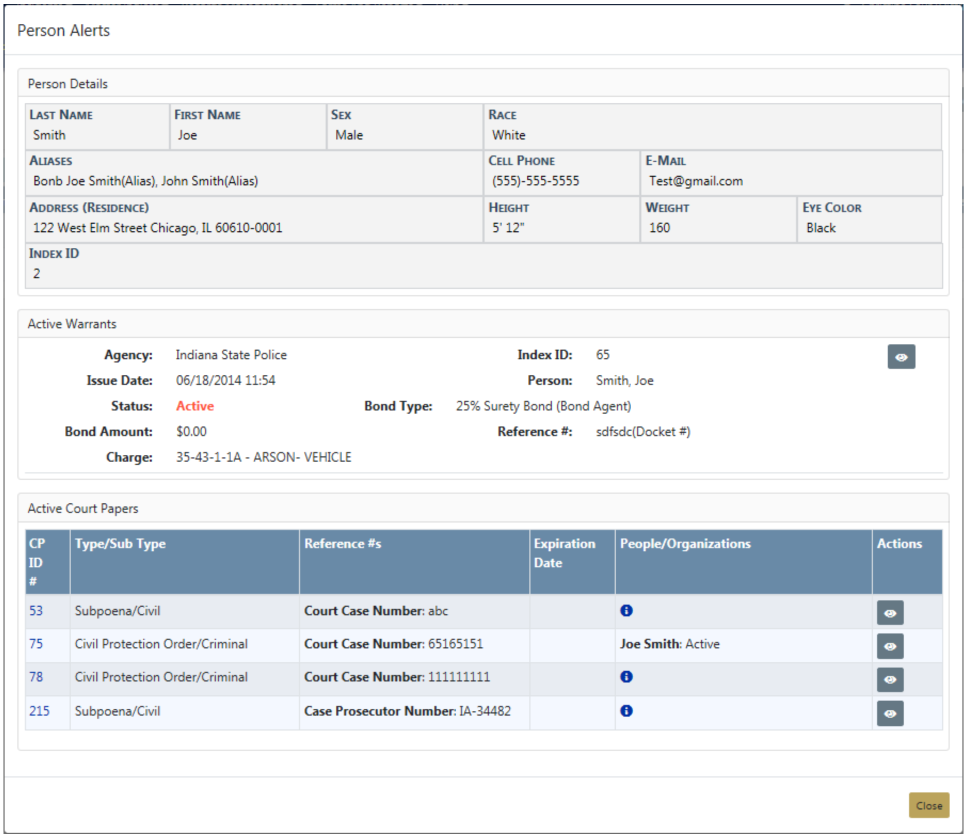
1. Locate the record you need to delete from the table.
2. Click in the **Actions** column in the same row as the record listing. If the delete icon is not available to you, then you are not able to delete the charge category. To disable the charge category, uncheck the **Action** check box.
3. If a 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.

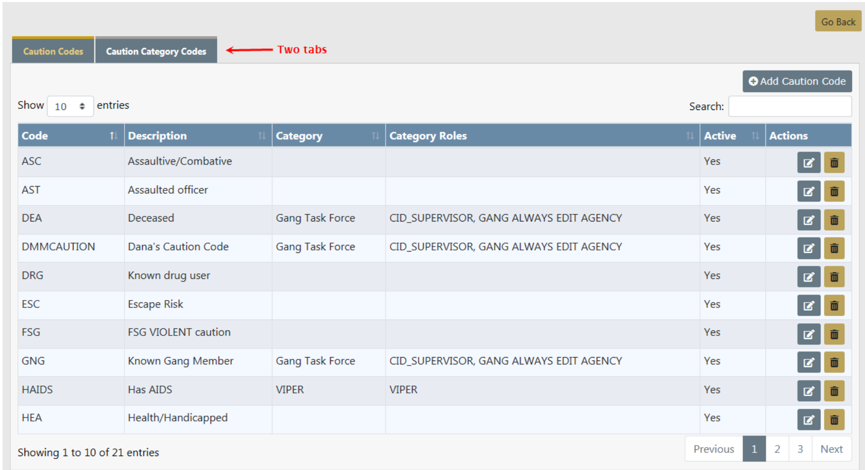




You may also search person records by Caution Code and date range. Refer to the *Caliber Public Safety Online RMS User Guide* for details.

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.



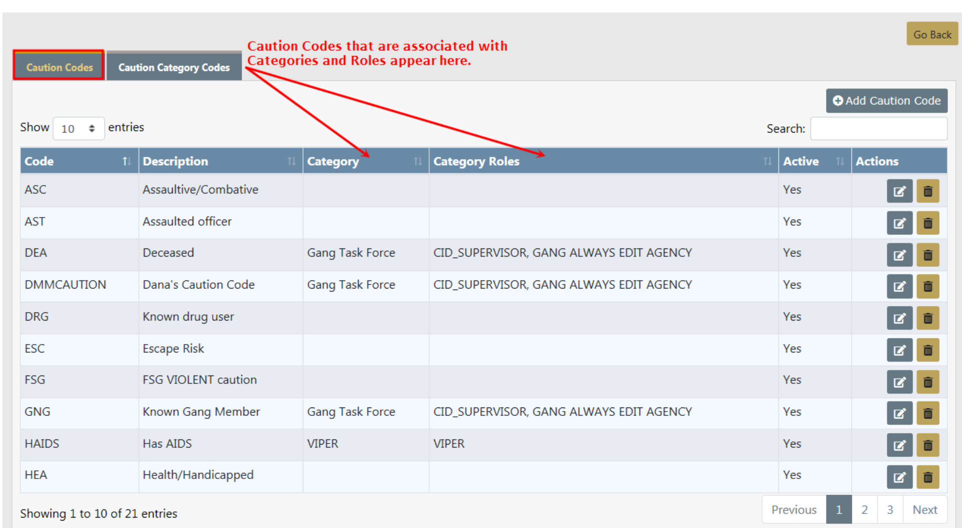
Code	Description	Category	Category Roles	Active	Actions
ASC	Assaultive/Combative			Yes	
AST	Assaulted officer			Yes	
DEA	Deceased	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
DMMCAUTION	Dana's Caution Code	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
DRG	Known drug user			Yes	
ESC	Escape Risk			Yes	
FSG	FSG VIOLENT caution			Yes	
GNG	Known Gang Member	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	
HAIDS	Has AIDS	VIPER	VIPER	Yes	
HEA	Health/Handicapped			Yes	

Two tabs are associated with the **Caution Codes** page: *Caution Codes* and *Caution Category Codes*.

Caution Codes Tab

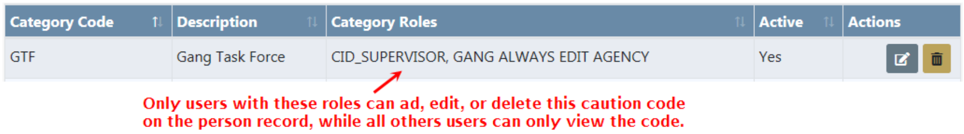
The *Caution Codes* tab lists the Category Codes and associated Caution Category Codes and Roles, if any.

Note: Caution Category Codes are optional. Refer to the "Caution Category Codes Tab" on page 214 section for more information.



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	

Associating a Category Code and Role to a Caution Code allows designated users exclusive access to administer the Category Code on a person record.

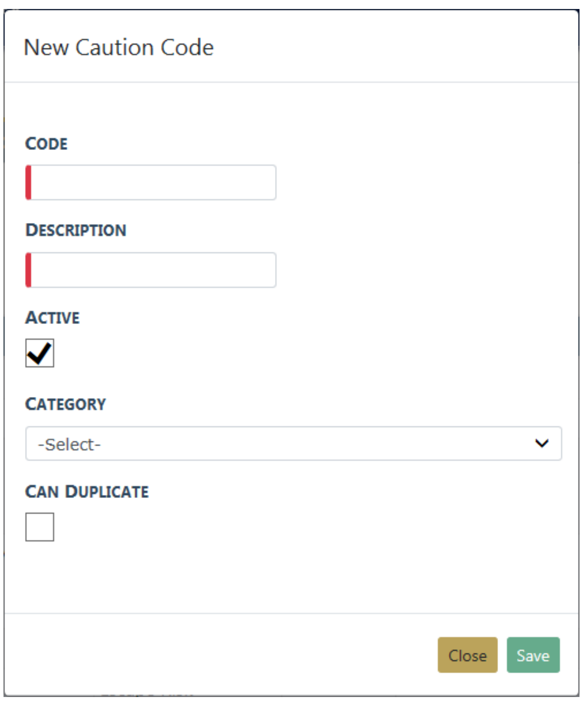


Note: If a Caution Category Role is not associated with a Role, or a Caution Category Code is not associated with a Caution category, then every user has access.

Add Caution Codes

Use the following procedure to add a caution code to the *Caution Codes* tab of the Caution Codes table.

1. Click the **Add Caution Code** button in the upper right corner of the *Caution Codes* table to display a *New Caution Code* page.



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.

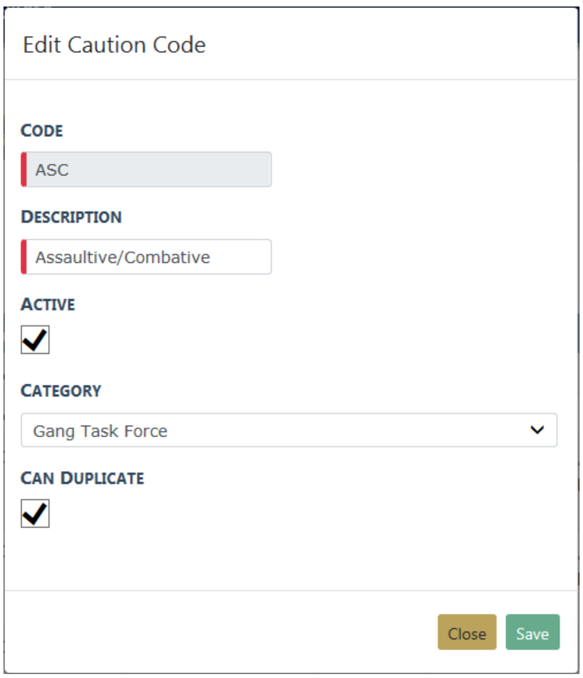
5. Click **Save** to save the record and return to the *Caution Codes* table.

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.



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.

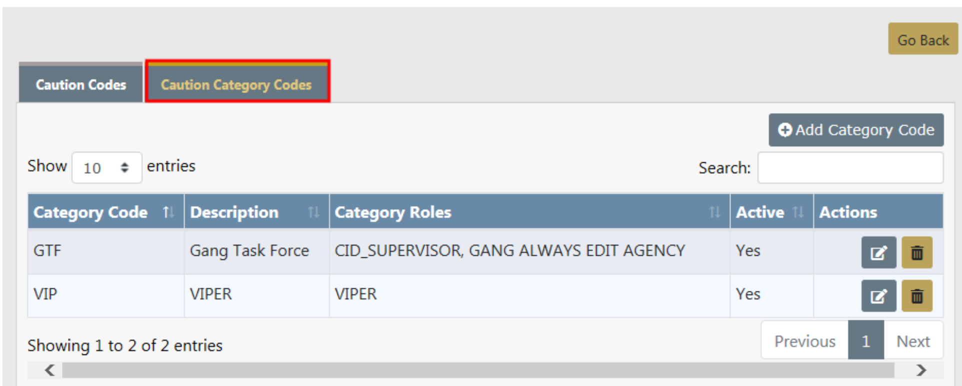
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Caution Codes* table.

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.

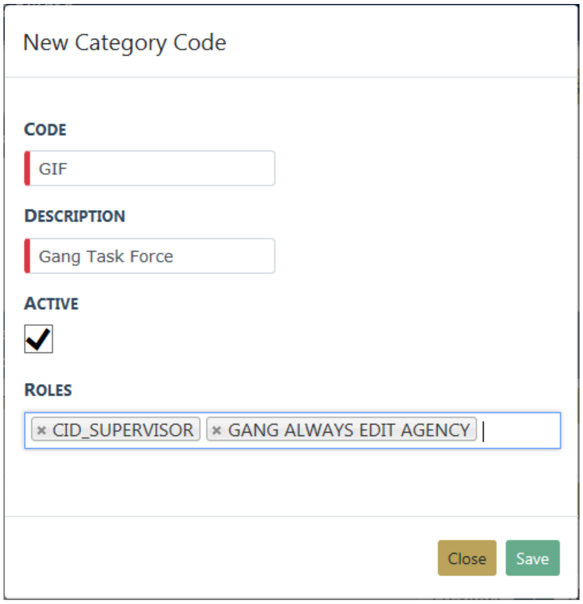
Caution Categories are optional. You can have a few or as many that makes sense for your agency.



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.



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**.

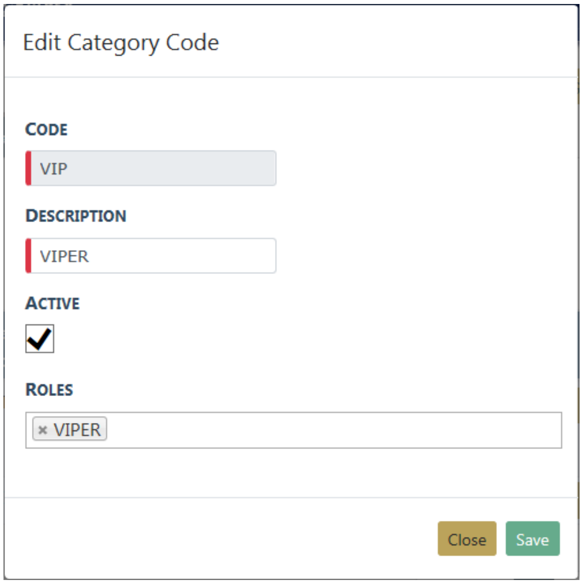
5. Click **Save** to save the record and return to the *Caution Category Codes* tab.

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.



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.

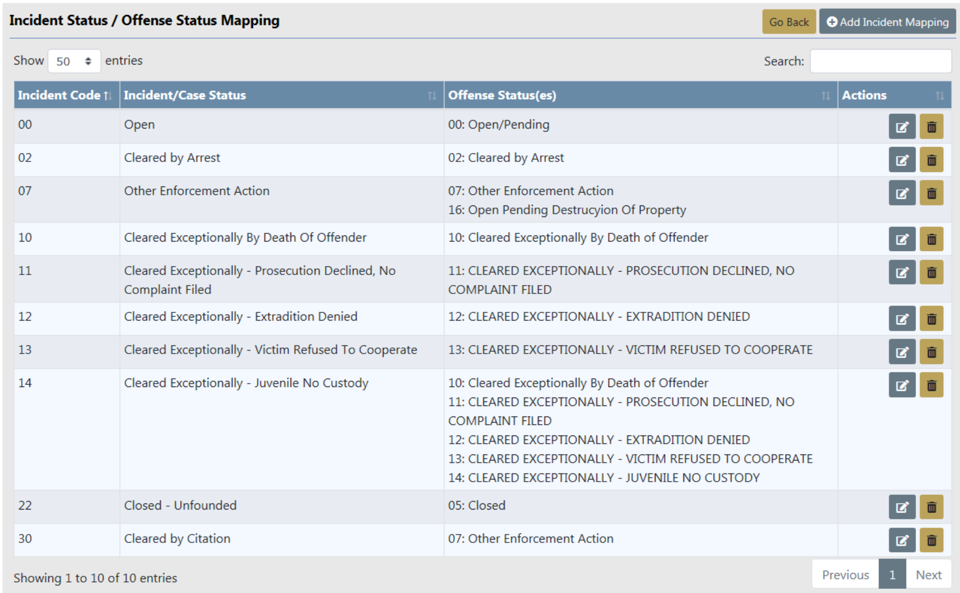
1. Locate the record you need to delete from the table.
2. Click in the **Actions** column in the same row as the record listing.
3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Caution Category Codes* tab.

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

Go Back | Add Incident Mapping

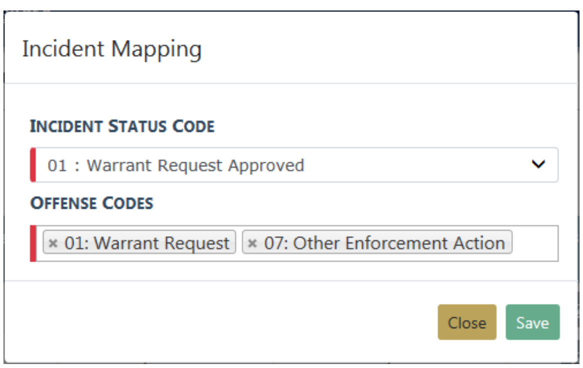
Show 50 entries Search:

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 Destrucyion 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.



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.

2. Click in the **Actions** column in the same row as the record to display the *Incident Mapping* page.

3. Make changes as needed.

4. Click **Save** to save changes and return to the *Mappings* table.

Delete Incident and Offense Status Mapping

1. Locate the record you need to delete from the table.

2. Click in the **Actions** column in the same row as the record listing.

3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Mappings* table.

Court Locations

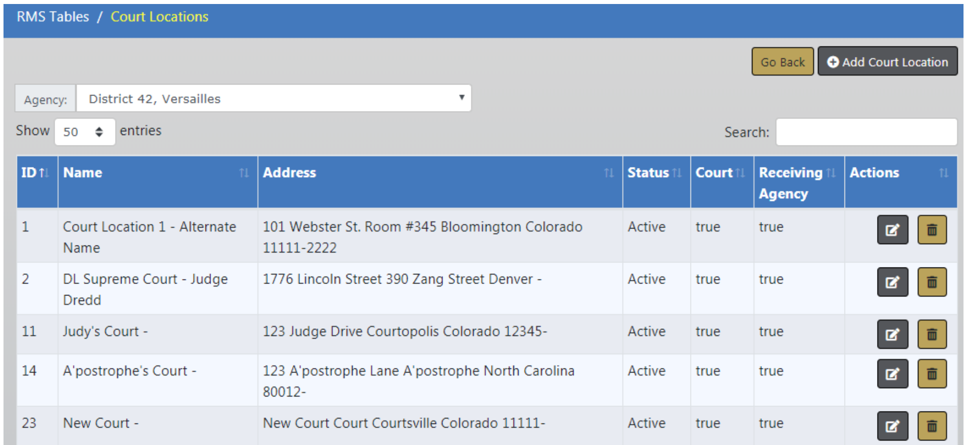
Agencies using the *Civil Process* and *Warrant* modules have the ability to manage Court Locations. Only agency administrators with proper permissions can add, edit, and delete *Court Locations*. The *Civil* and *Warrant* modules display the *Court Locations* as a list of values when adding court papers 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.

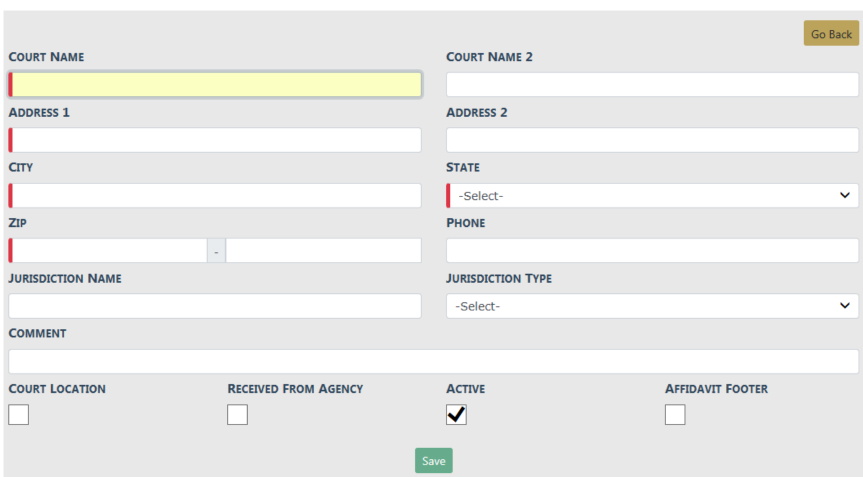


Follow the same procedure to add, edit, and delete *Court Locations*, regardless of which access option you use.

Add Court Locations

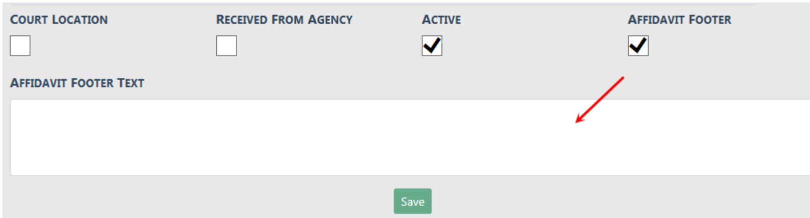
Use the following procedure to add a court location to the *Court Locations* table.

1. Click the **Add Court Location** button in the upper right corner of the *Court Locations* table to open a blank entry form.



2. Complete all required fields and optionally complete others.

3. Check all boxes that apply. If you select Affidavit Footer, enter the appropriate information in the additional text box that appears below the buttons.



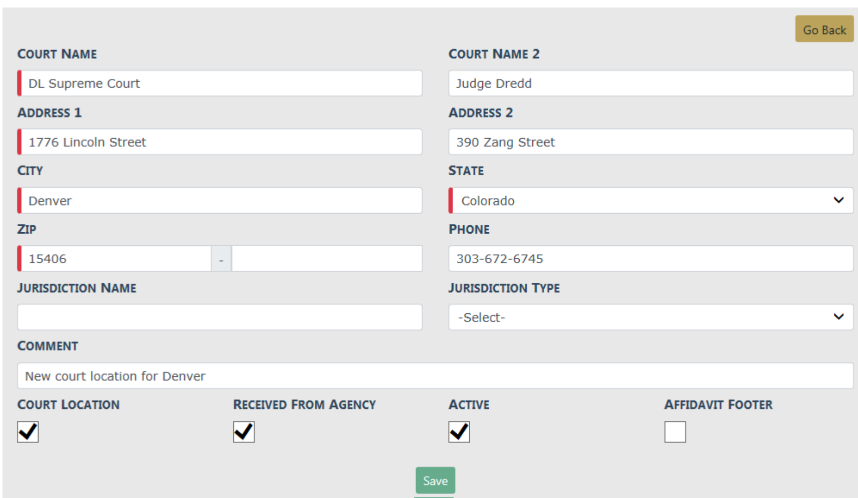
4. Click **Save** to save the record and return to the *Court Locations* table.

Edit Court Locations

Use the following procedure to edit a caution code in the *Court Locations* table.

1. Locate the record you need to edit.

2. Click in the **Actions** column in the same row as the record to open the record for editing.



3. Make changes as needed.

4. Click **Save** to save changes and return to the *Court Locations* table.

Delete Court Locations

Use the following procedure to delete a court location from the *Court Locations* table.

1. Locate the record you need to delete from the table.

2. Click in the **Actions** column in the same row as the record listing.

3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Court Locations* table.

Judges

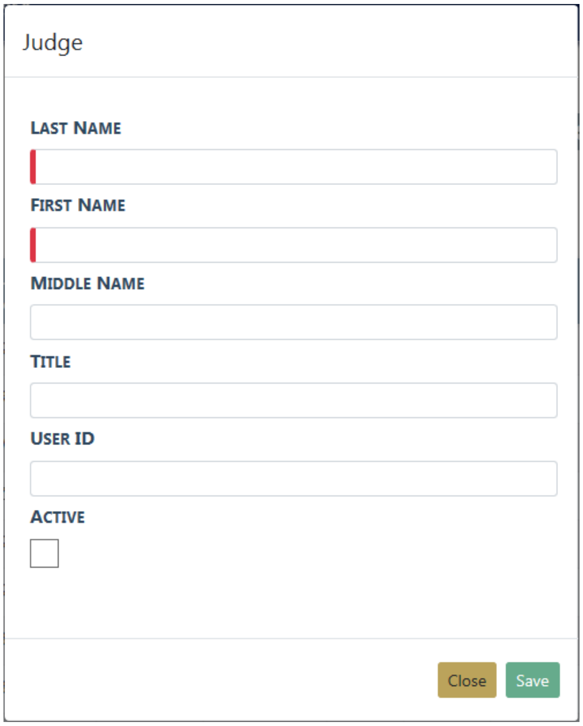
To setup judges, click the Judges link on the **RMS Tables** tab of the *Tables* page. For instructions on accessing the *Tables* page refer to AccessTables.htm.

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

Add Judge

Use the following procedure to add a judge to the *Judges* table.

1. Click the **Add Judge** button in the upper right corner of the *Judges* table to open a blank entry form.



2. Complete all required fields and optionally complete others.

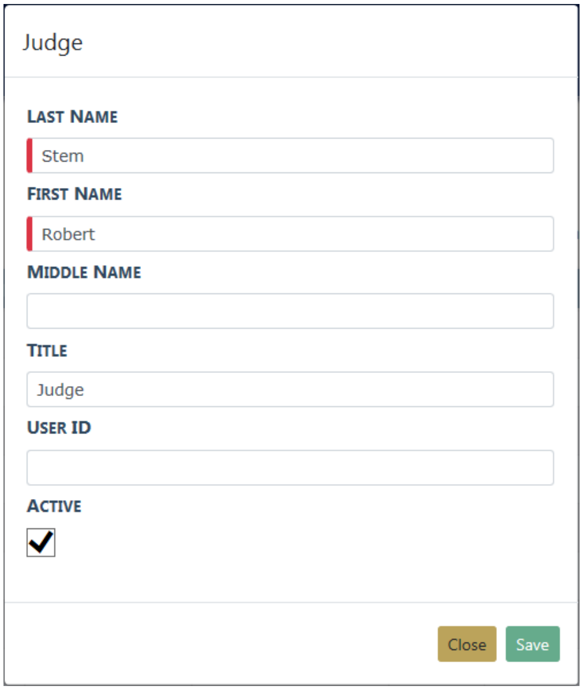
3. Click **Save** to save the record and return to the *Judges* table.

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.



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.

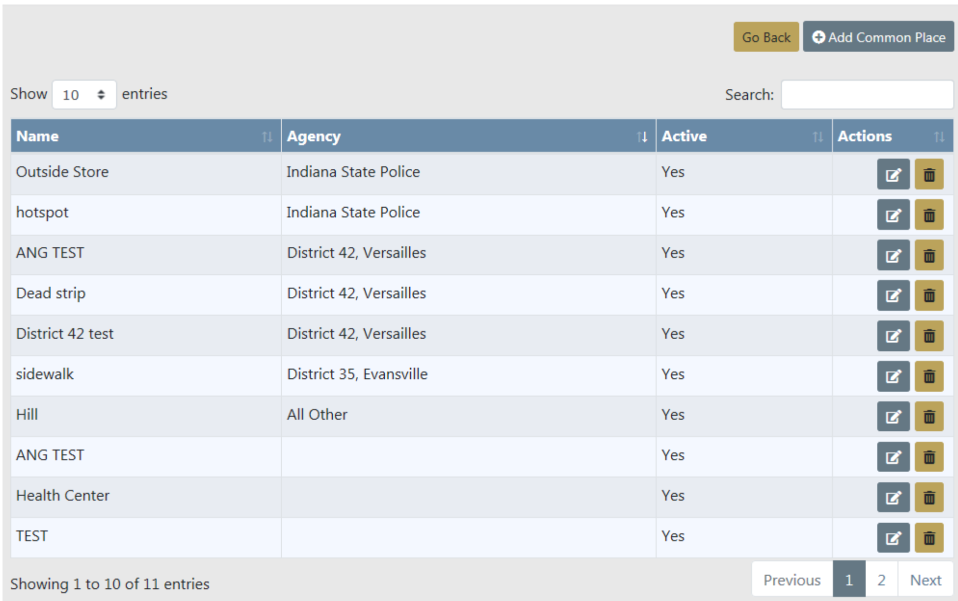
1. Locate the record you need to delete from the table.
2. Click in the **Actions** column in the same row as the record listing.
3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Judges* table.

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.


Go Back | Add Common Place

Show 10 entries Search:

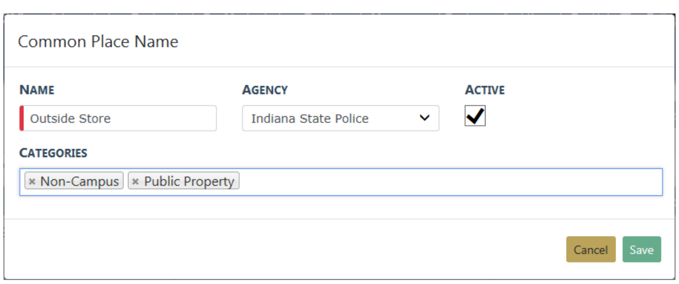
Name	Agency	Active	Actions
Outside Store	Indiana State Police	Yes	
hotspot	Indiana State Police	Yes	
ANG TEST	District 42, Versailles	Yes	
Dead strip	District 42, Versailles	Yes	
District 42 test	District 42, Versailles	Yes	
sidewalk	District 35, Evansville	Yes	
Hill	All Other	Yes	
ANG TEST		Yes	
Health 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.



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

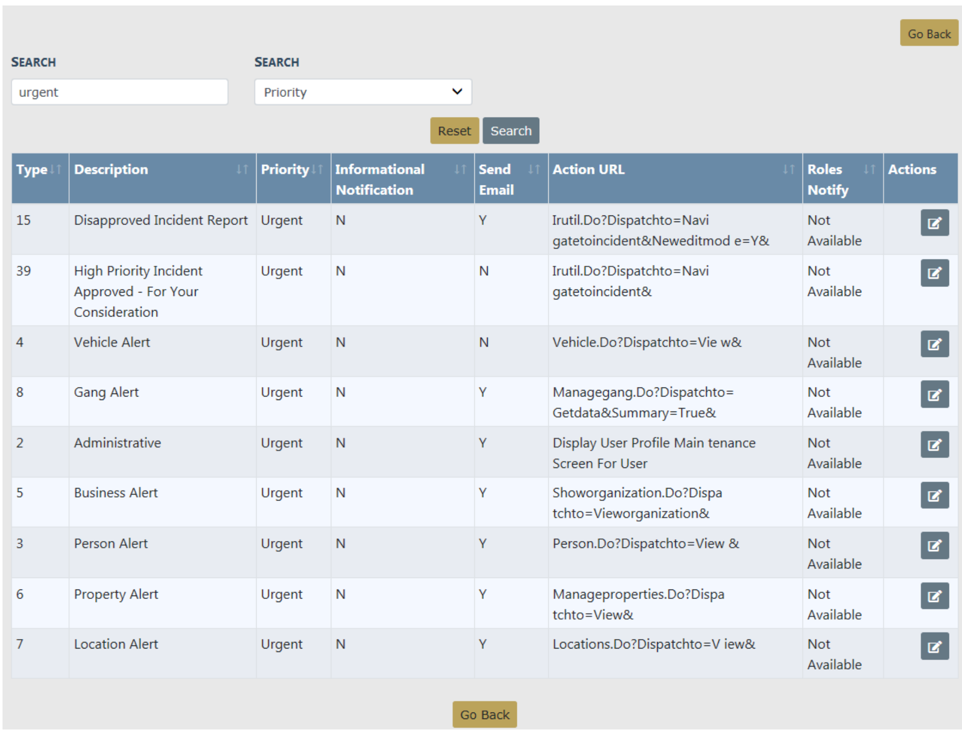
Use the following procedure to search the *Notifications Types* table.

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.



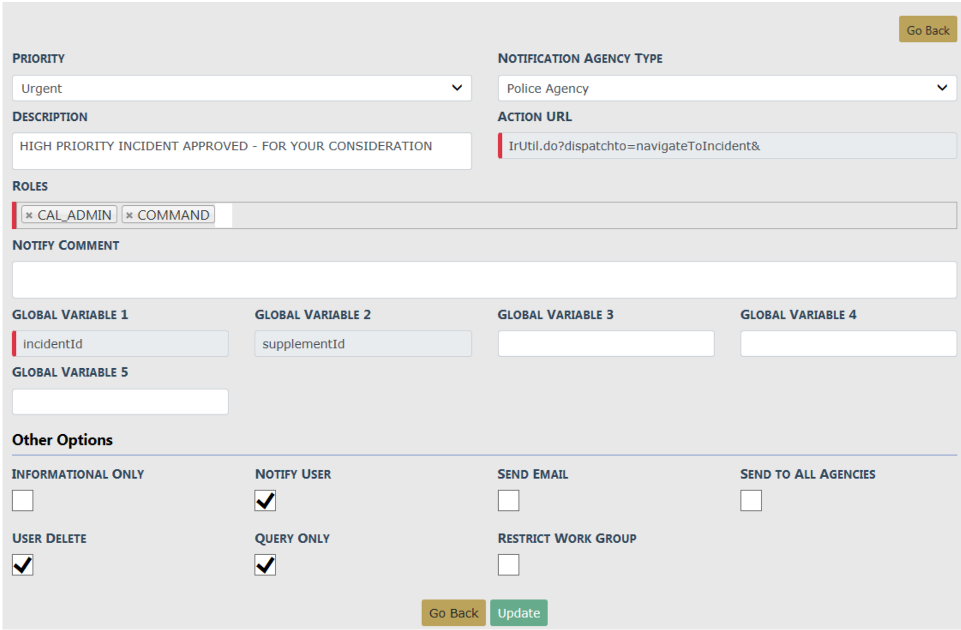
Type	Description	Priority	Informational Notification	Send Email	Action URL	Roles Notify	Actions
15	Disapproved Incident Report	Urgent	N	Y	Irutil.Do?Dispatchto=Navi gatetoincident&Neweditmod e=Y&	Not Available	
39	High Priority Incident Approved - For Your Consideration	Urgent	N	N	Irutil.Do?Dispatchto=Navi gatetoincident&	Not Available	
4	Vehicle Alert	Urgent	N	N	Vehicle.Do?Dispatchto=Vie w&	Not Available	
8	Gang Alert	Urgent	N	Y	Managegang.Do?Dispatchto= Getdata&Summary=True&	Not Available	
2	Administrative	Urgent	N	Y	Display User Profile Main tenance Screen For User	Not Available	
5	Business Alert	Urgent	N	Y	Showorganization.Do?Dispa tchto=Vieworganization&	Not Available	
3	Person Alert	Urgent	N	Y	Person.Do?Dispatchto=View &	Not Available	
6	Property Alert	Urgent	N	Y	Manageproperties.Do?Dispa tchto=View&	Not Available	
7	Location Alert	Urgent	N	Y	Locations.Do?Dispatchto=V iew&	Not Available	

The example is the result of a search for *Priority* with the key word *Urgent*.

Add a Notification Type

Use the following procedure to add a notification type to the *Notification Types* table.

1. Click the **Add Notification Type** button in the upper right corner to display an *Add Notification Type* page as shown below.



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**.

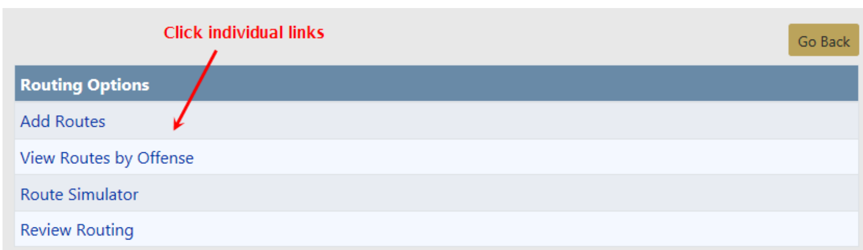
Delete a Notification Type

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.

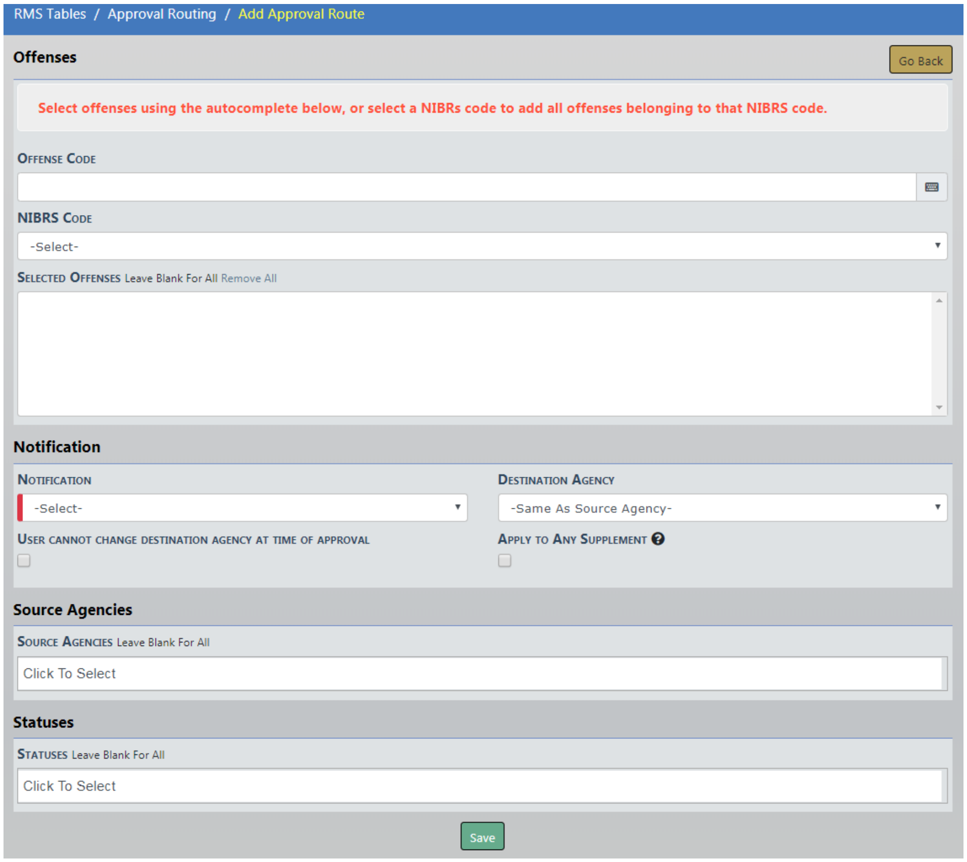
Approval Routes

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.

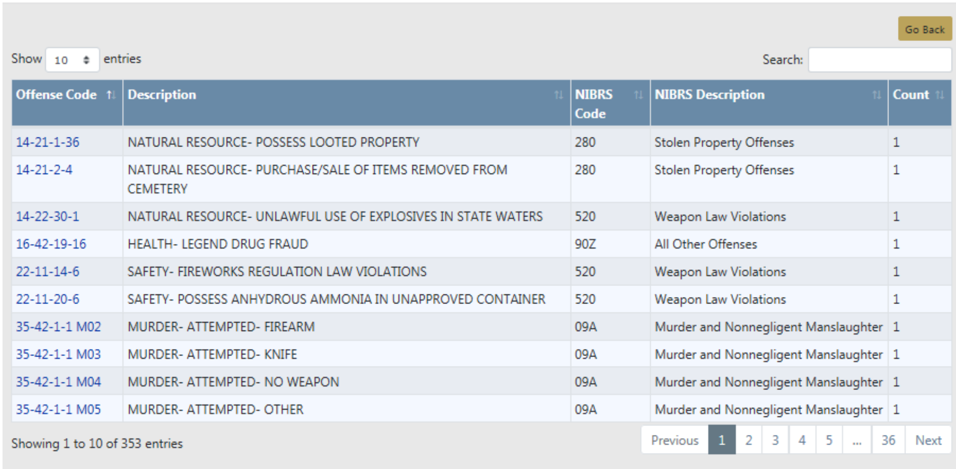


Complete all required fields and as many others as are applicable.

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

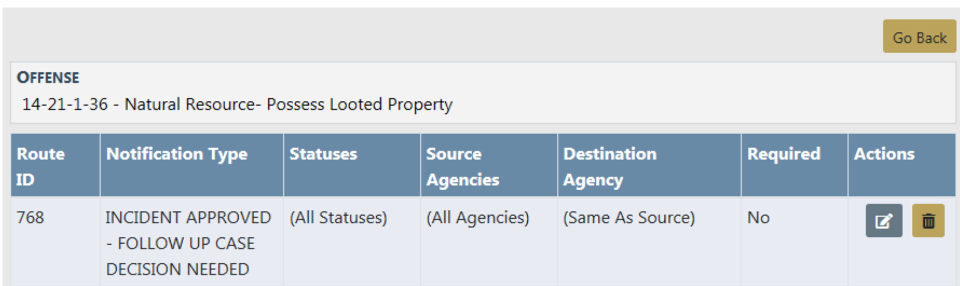
Show 10 entries Search:

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.



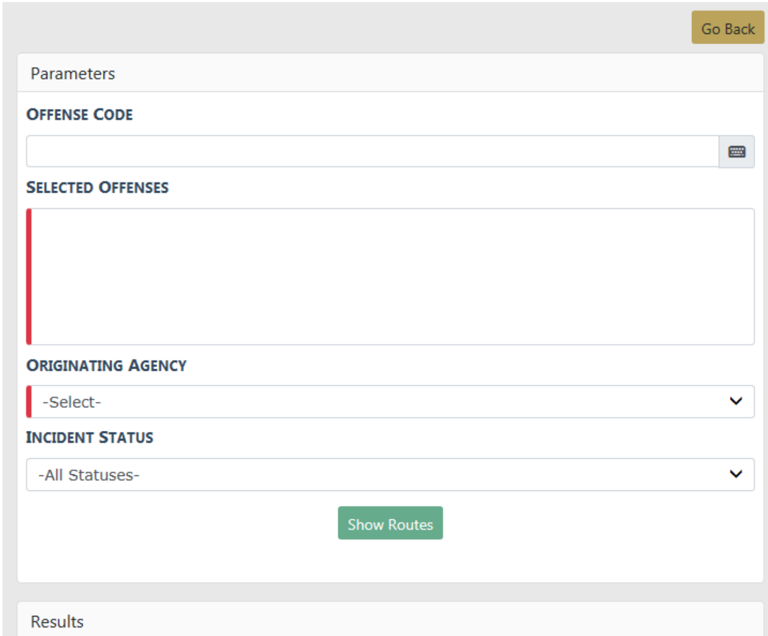
Go Back

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	

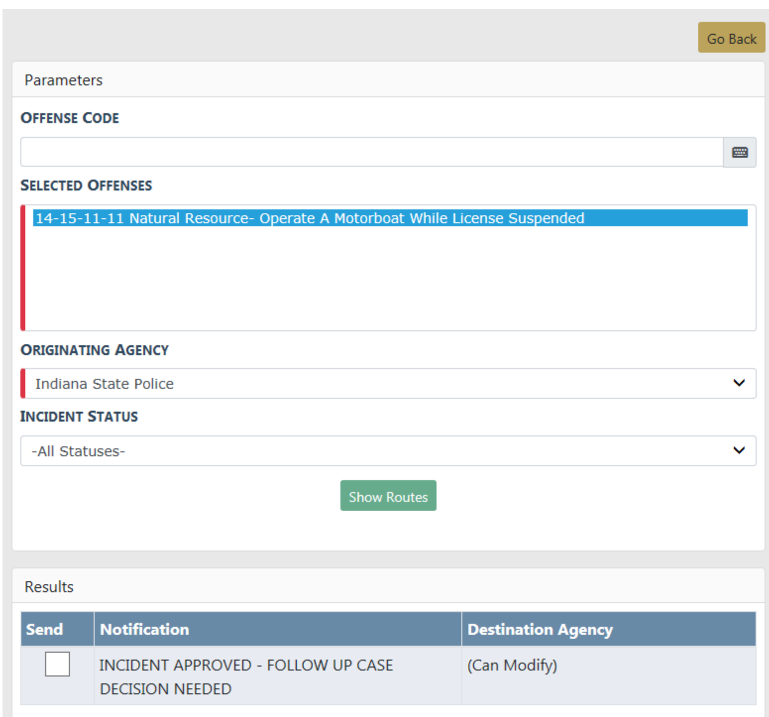
Route Simulator

Click <u>Route Simulator</u> to open the *Route Simulator* page as shown.



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.

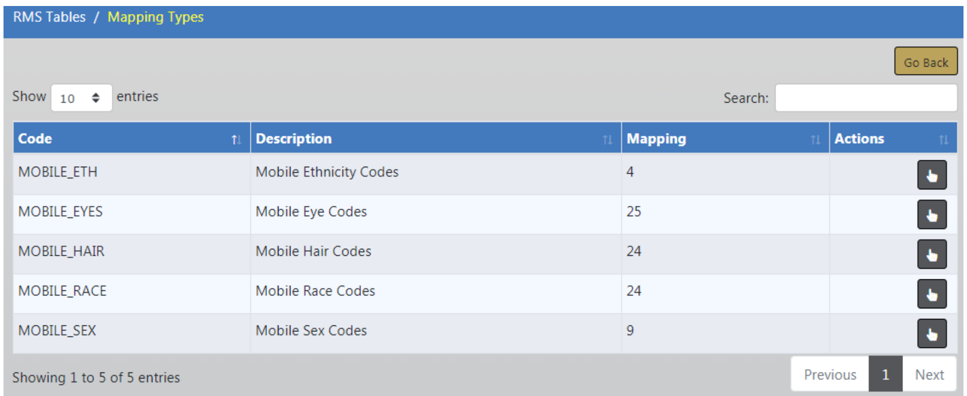
Complete required fields and others as needed, then click **Show Routes** to display the results at the bottom of the *Route Simulator* page.



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

Go Back

Show 10 entries 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

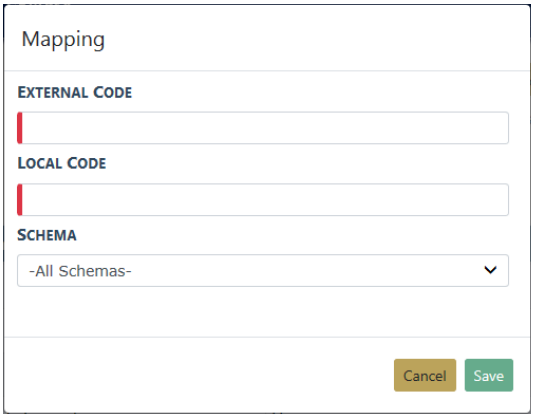
Go Back Add Mapping

Show 10 entries 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

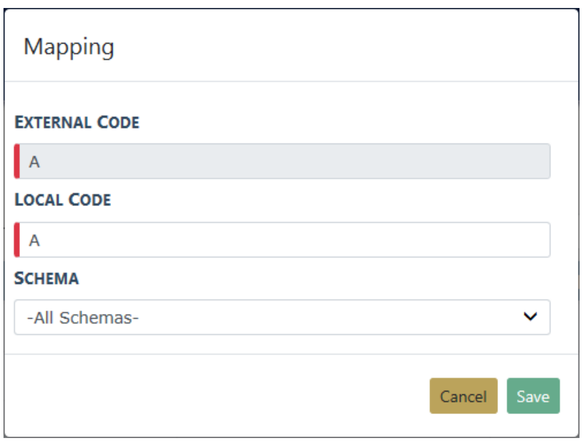
- To add a mapping, click the **Add Mapping** button to open the **Mapping** window as shown below.



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.



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.

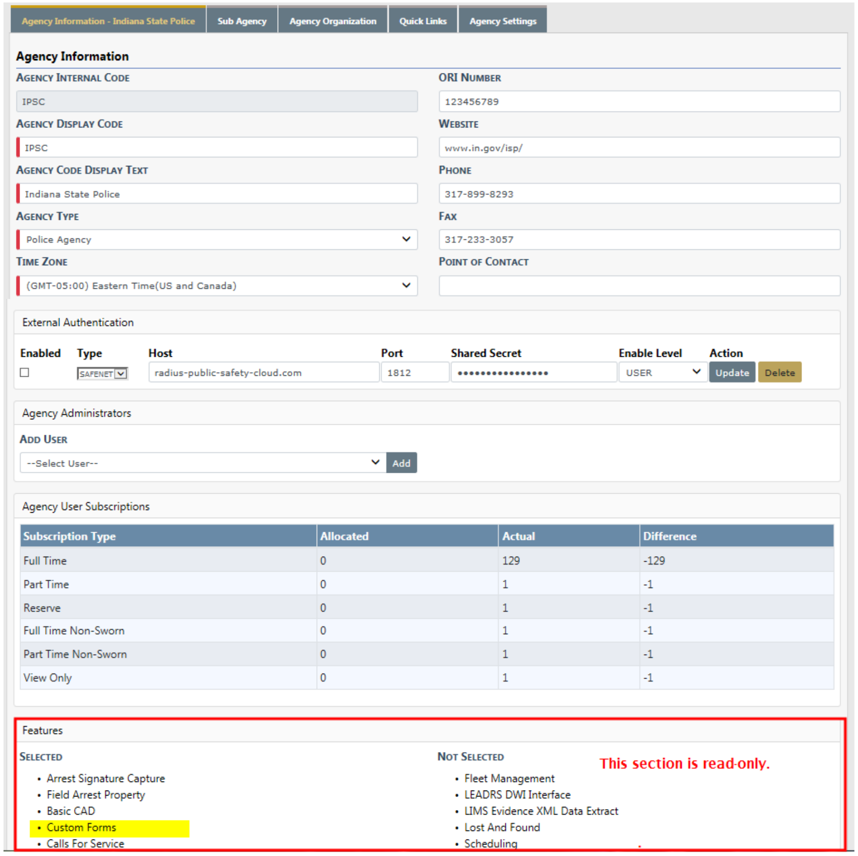
Community Reporting, a new Online RMS 11.3.2 feature (for minor crime, tips, and other police-related events), leverages the power of Online RMS Custom Forms, allowing agencies to create and manage their publicly available forms.

- 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.



Note: For instructions on accessing the Agency Profile refer to "Manage Agencies" on page 17.

Set Up Roles

An administrator with the appropriate permissions must set up specific roles with permission to use Custom Forms. It is up to the agency as to which roles are assigned Custom Form privileges.

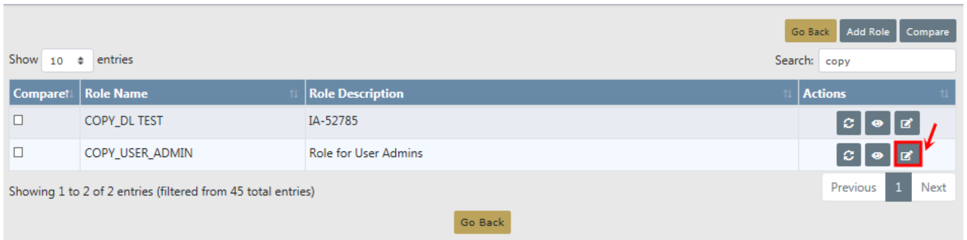
The administrator uses the following procedure to add Custom Forms rights to a role.

1. Access the Roles page and locate the Role you want to give Custom Forms rights to.

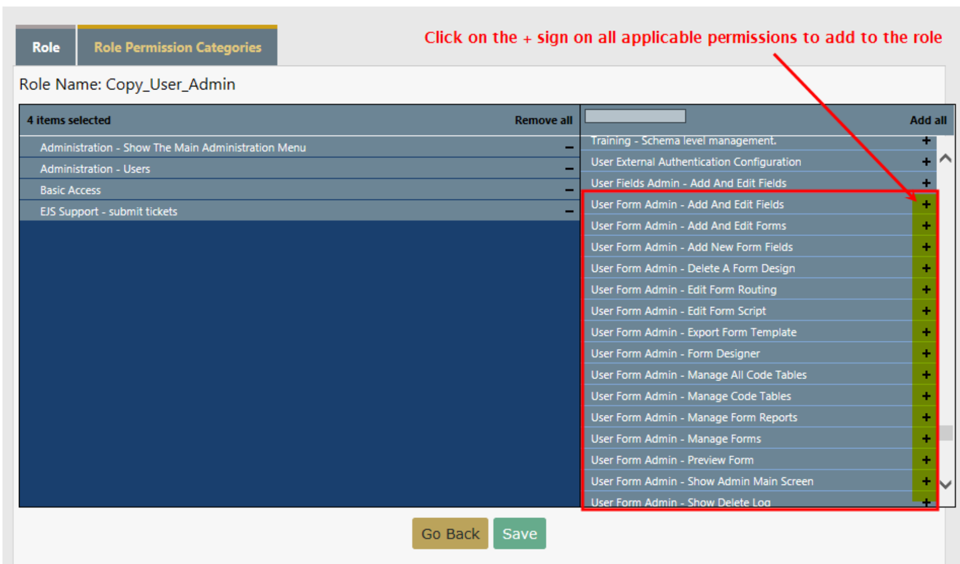
   Note: For details on accessing the Roles page refer to "Roles" on page 77.

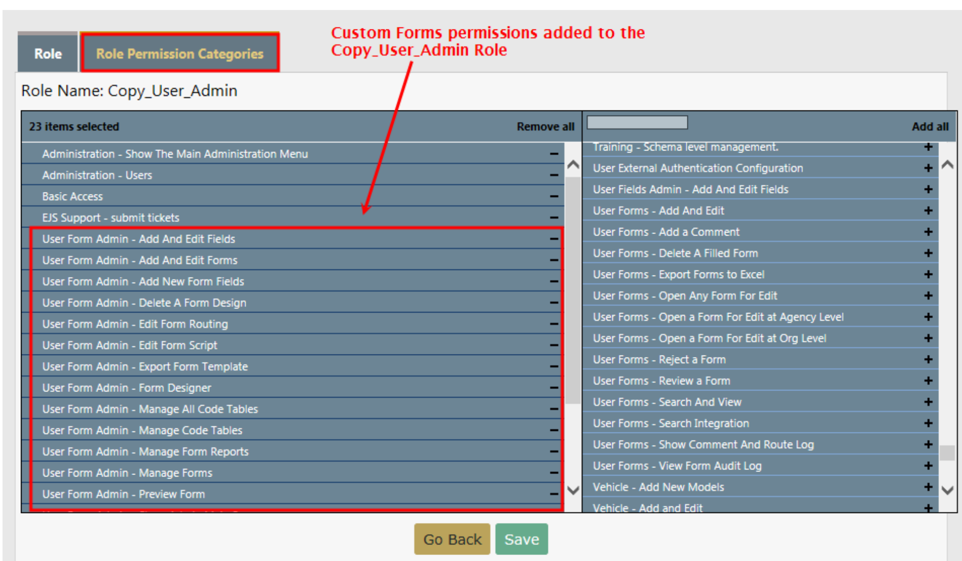
2. Click  in the **Actions** column in the same row as the role to open the *Edit Role* page.

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



3. Click the **Role Permission Categories** tab to open the *Role Permission Categories* page where you can add or remove permissions for the selected role.





4. 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*.

5. Click **Save** to save changes.

6. When changes are complete for this role, click **Go Back** to return to the *Roles* page.

7. Log out or continue working in the Roles module as needed.

Form Administration

Click the **Administration** label to display the *Administration Home* page. From the *Administration Home* page, click the **Custom Forms** icon to open the *Form Administration* page.

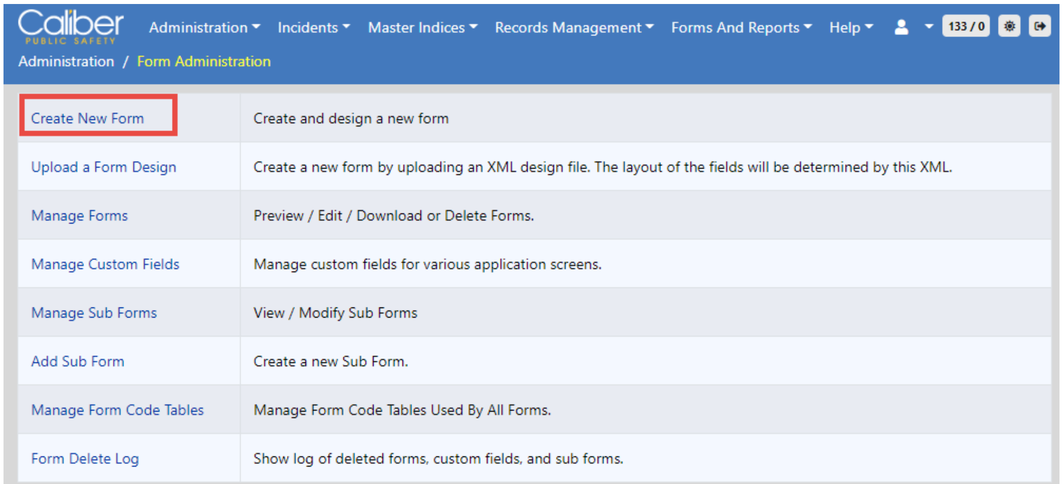
Form Administration	
Create New Form	Create and design a new form
Upload a Form Design	Create a new form by uploading an XML design file. The layout of the fields will be determined by this XML.
Manage Forms	Preview / Edit / Download or Delete Forms.
Manage Custom Fields	Manage custom fields for various application screens.
Manage Sub Forms	View / Modify Sub Forms
Add Sub Form	Create a new Sub Form.
Manage Form Code Tables	Manage Form Code Tables Used By All Forms.
Form Delete Log	Show log of deleted forms, custom fields, and sub forms.

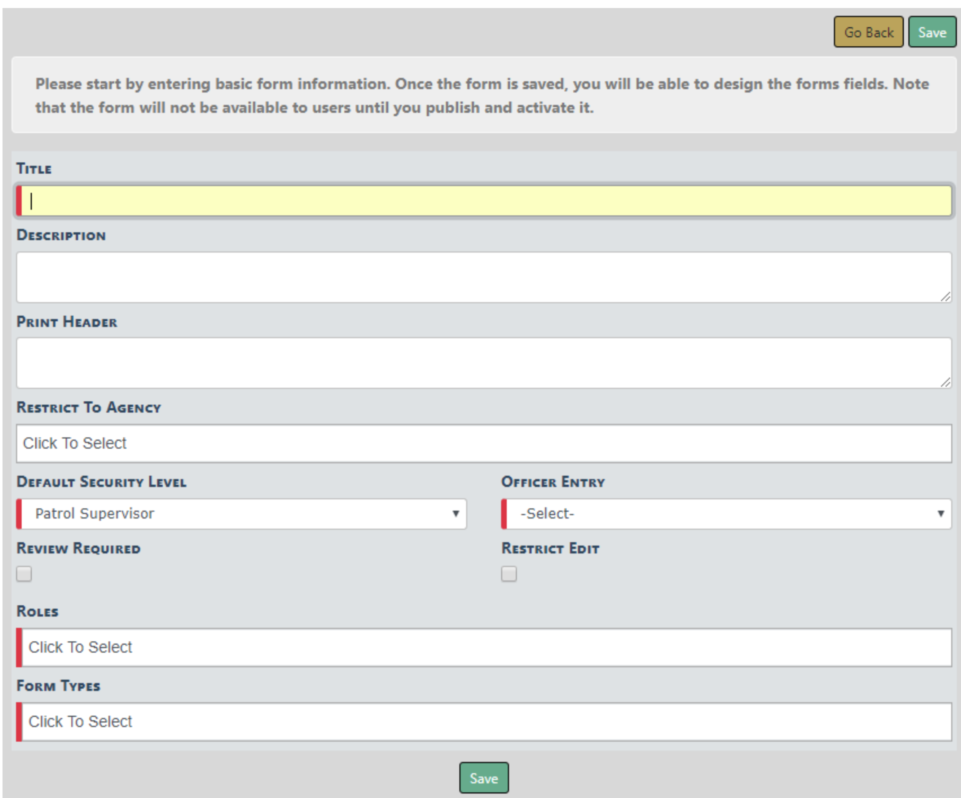
From here, an administrator can create a new custom form, upload a form design, manage forms, manage custom fields, manage sub forms, add sub form, manage code tables, and show the form delete log. When an administrator adds a new form, certain information is required, such as Name, Title, Default Security Level, Officer Entry, Roles, and Form Types. The agency administrator decides how to fill out the required fields. This information may be changed later if the administrator chooses to edit the forms.

Create (Add) New Form

Use the following procedure to create a new form.

1. From the *Form Administration* page, click the Create New Form link to open the *Add Form* page as shown.





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.

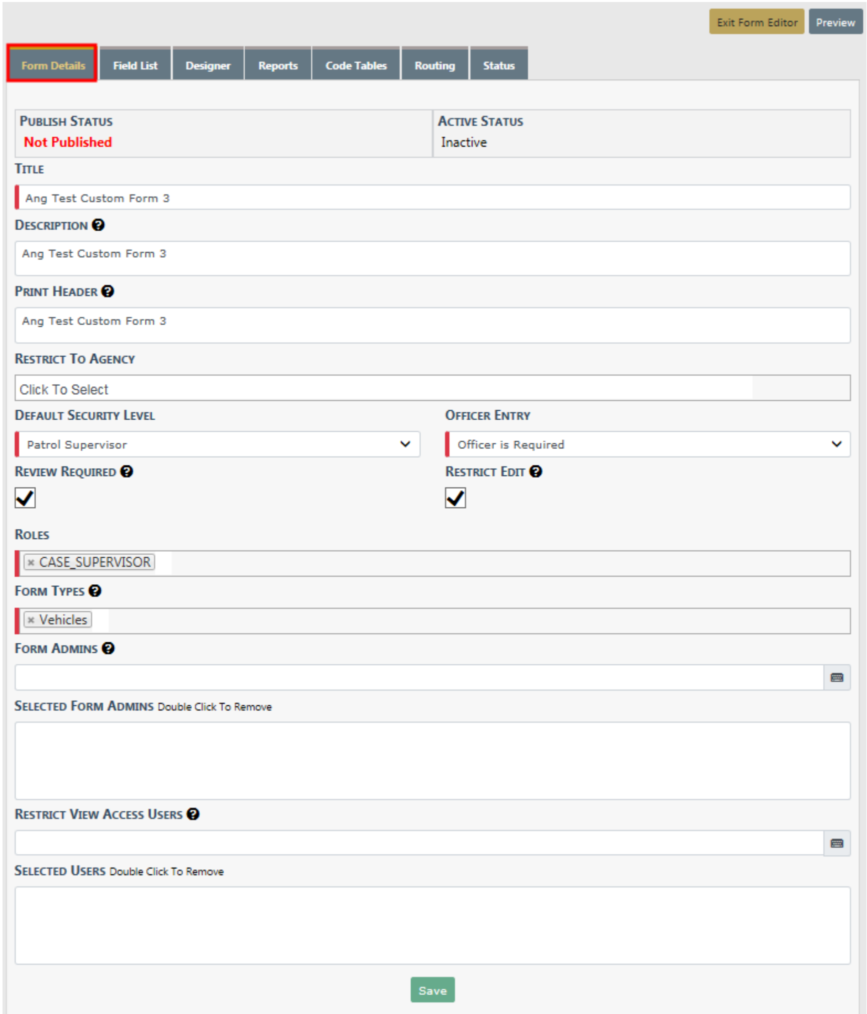
9. Check the **Restrict Edit** box, if appropriate.

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.)



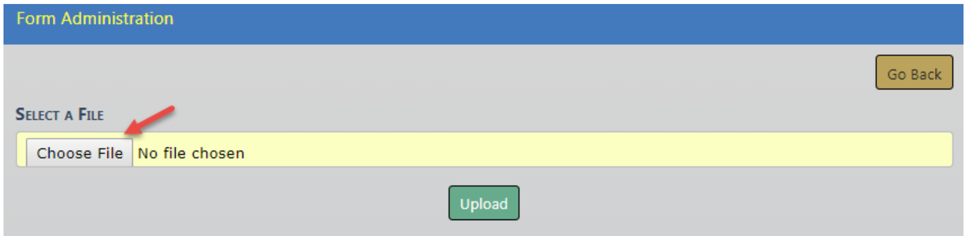
Note: From the *Administration Home* page, you can click on the Custom Forms icon to open the *Form Administration* page then click the Manage Forms link to open the *Manage Forms* page at any time. From the *Manage Forms* page, you can edit, view, print, and/or delete forms.

The **Publish Status** is listed in red text for forms that are not published.

Upload Form Design

Use the following procedure to upload a form design.

1. From the *Form Administration* page, click the Upload a Form Design link to open the *Upload Form* page as shown.



2. Click the **Choose File** button in the **Select a File** field to open the *File Explorer* window listing your local directories.

3. Navigate to the folder containing form design documents.

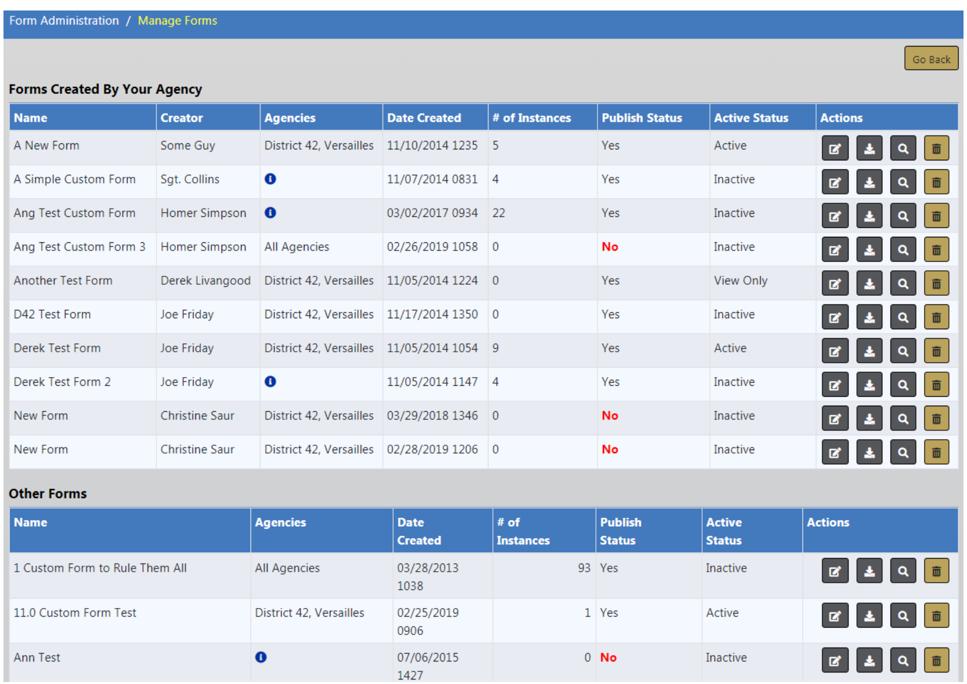
4. Click to select a file then click the **Open** button to pull the path into the **Select a File** field.

5. Click **Upload** to upload the file.

Manage Forms

Use the following procedure to manage forms.

1. From the *Form Administration* page, click the Manage Forms link to open the *Manage Forms* page as shown.


Form Administration / Manage Forms

Go Back

Forms Created By Your Agency

Name	Creator	Agencies	Date Created	# of Instances	Publish Status	Active Status	Actions
A New Form	Some Guy	District 42, Versailles	11/10/2014 1235	5	Yes	Active	
A Simple Custom Form	Sgt. Collins		11/07/2014 0831	4	Yes	Inactive	
Ang Test Custom Form	Homer Simpson		03/02/2017 0934	22	Yes	Inactive	
Ang Test Custom Form 3	Homer Simpson	All Agencies	02/26/2019 1058	0	No	Inactive	
Another Test Form	Derek Livangood	District 42, Versailles	11/05/2014 1224	0	Yes	View Only	
D42 Test Form	Joe Friday	District 42, Versailles	11/17/2014 1350	0	Yes	Inactive	
Derek Test Form	Joe Friday	District 42, Versailles	11/05/2014 1054	9	Yes	Active	
Derek Test Form 2	Joe Friday		11/05/2014 1147	4	Yes	Inactive	
New Form	Christine Saur	District 42, Versailles	03/29/2018 1346	0	No	Inactive	
New Form	Christine Saur	District 42, Versailles	02/28/2019 1206	0	No	Inactive	

Other Forms

Name	Agencies	Date Created	# of Instances	Publish Status	Active Status	Actions
1 Custom Form to Rule Them All	All Agencies	03/28/2013 1038	93	Yes	Inactive	
11.0 Custom Form Test	District 42, Versailles	02/25/2019 0906	1	Yes	Active	
Ann Test		07/06/2015 1427	0	No	Inactive	

2. Using the icons in the **Action** column in the same row as the form, continue as follows:

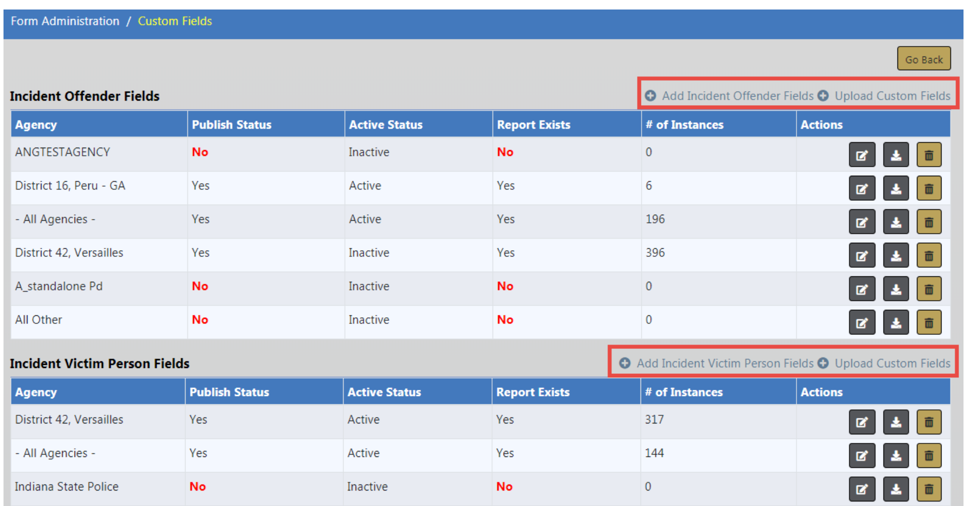
- To delete a form, click .

  Note: You may not delete a form that is active. You must first deactivated 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

1. From the *Form Administration* page, click the Manage Custom Fields link to open the *Custom Fields* page.

Form Administration / Custom Fields

Go Back

Incident Offender Fields

Add Incident Offender Fields Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
ANGTESTAGENCY	No	Inactive	No	0	
District 16, Peru - GA	Yes	Active	Yes	6	
- All Agencies -	Yes	Active	Yes	196	
District 42, Versailles	Yes	Inactive	Yes	396	
A_standalone Pd	No	Inactive	No	0	
All Other	No	Inactive	No	0	

Incident Victim Person Fields

Add Incident Victim Person Fields Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
District 42, Versailles	Yes	Active	Yes	317	
- All Agencies -	Yes	Active	Yes	144	
Indiana State Police	No	Inactive	No	0	

Incident Offense Fields

Add Incident Offense Fields Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
All Other	Yes	Active	Yes	19	
Indiana State Police	Yes	Active	Yes	380	
- All Agencies -	Yes	Active	Yes	10	

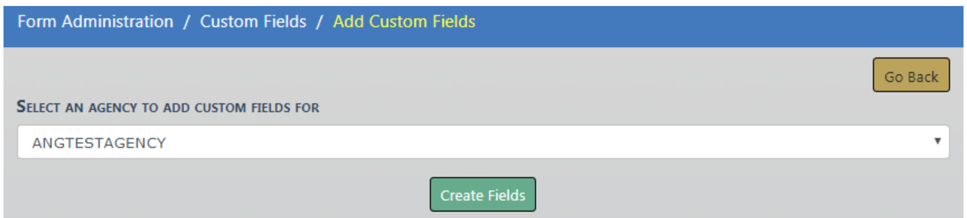
You can

If you choose to add fields from existing forms, the following forms are available:

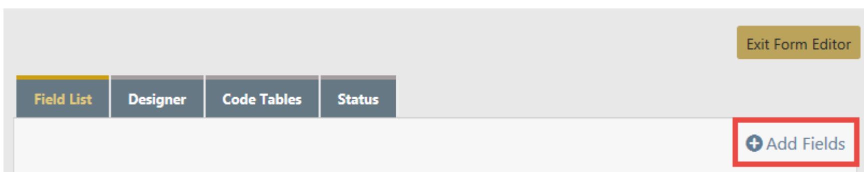
- Incident Offender
- Incident Victim Person
- Incident Offense
- Field Arrest
- Field Contact
- Case
- Warrant
- Citation
- Field Arrest Vehicle
- Incident Header
- Calls For Service
- Impound
- Court Paper

- Fleet Vehicle
- Case Activity
- Criminal Complaint

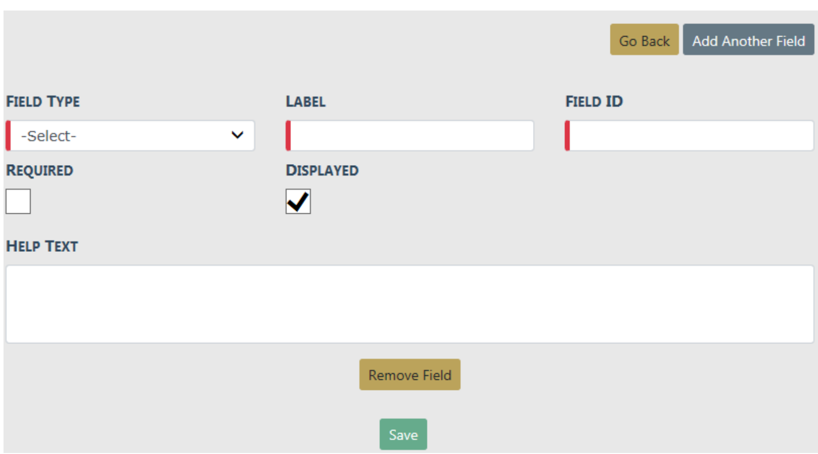
2. Click the appropriate Add...Fields link to open a page similar to the one shown.



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

Go Back

Incident Offender Fields — Add Incident Offender Fields · Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
ANGTESTAGENCY	No	Inactive	No	0	
District 16, Peru - GA	Yes	Active	Yes	6	
- All Agencies -	Yes	Active	Yes	196	
District 42, Versailles	Yes	Inactive	Yes	396	
A_standalone Pd	No	Inactive	No	0	
All Other	No	Inactive	No	0	

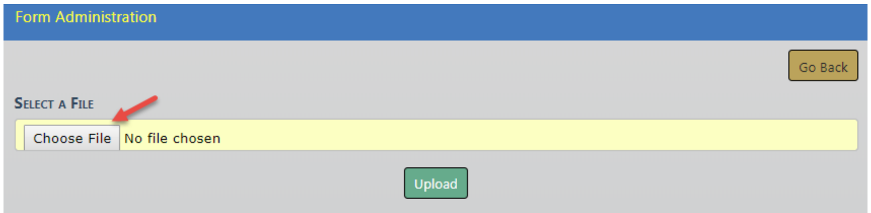
Incident Victim Person Fields — Add Incident Victim Person Fields · Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
District 42, Versailles	Yes	Active	Yes	317	
- All Agencies -	Yes	Active	Yes	144	
Indiana State Police	No	Inactive	No	0	

Incident Offense Fields — Add Incident Offense Fields · Upload Custom Fields

Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
All Other	Yes	Active	Yes	19	
Indiana State Police	Yes	Active	Yes	380	
- All Agencies -	Yes	Active	Yes	10	

2. Click the Upload Custom Fields link to open the *Upload Form*.



3. Click **Browse** to the right of the **Select a File** field to open the *File Upload* window with your local directories.

4. Navigate to the folder containing form design documents.

5. Click to select a file and pull the path into the **Select a File** field.

6. Click **Upload** to upload the file and open the *Form Resource Review* page. Fleet Vehicle fields are used for illustration purposes, but the same general process applies to other areas.

   a. If the Field IDs in the uploaded document match fields that already exist, then enter new **Field IDs** by entering new **Updated Value** values.

   b. If no duplicate Field IDs are found in the uploaded document, a *No Duplicate Field Values Found* message appears.

7. Click the **Continue to Preview** button to open the *Add Fields* page

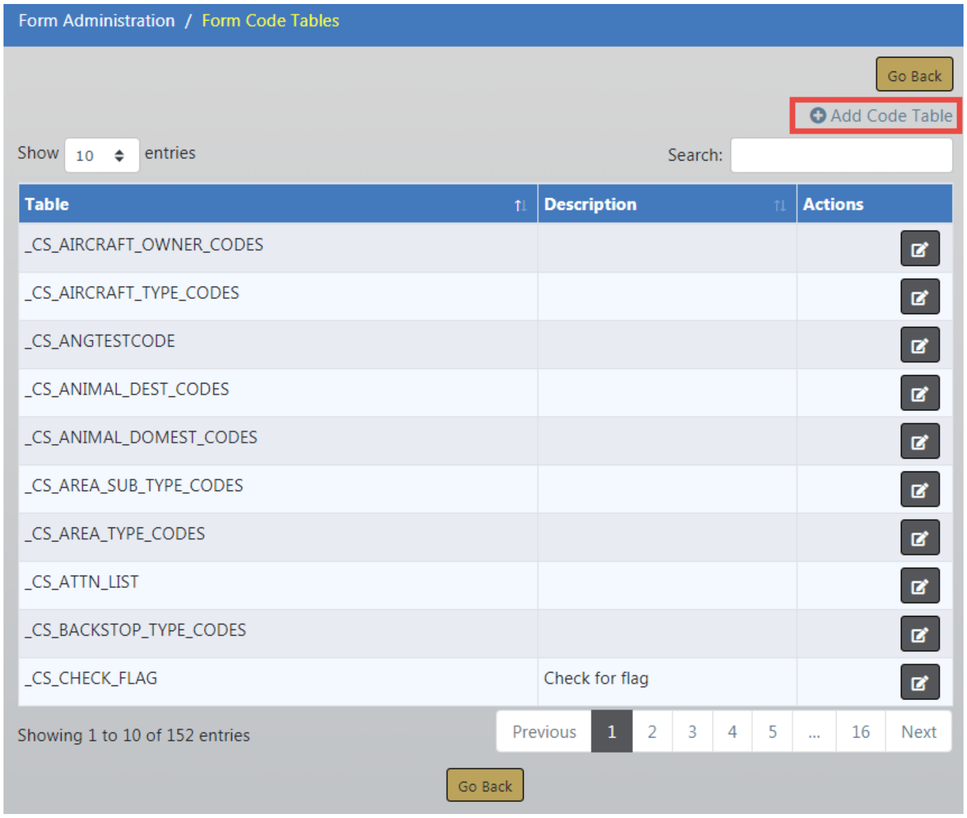
8. Select an **Agency** then click the **Create Fields** button to open the normal *Field List* screen.

9. Add more fields or click on the *Designer* tab to place the new fields on the form. For more information on the *Designer* tab refer to "Designer Tab" on page 258.

Manage Form Code Tables

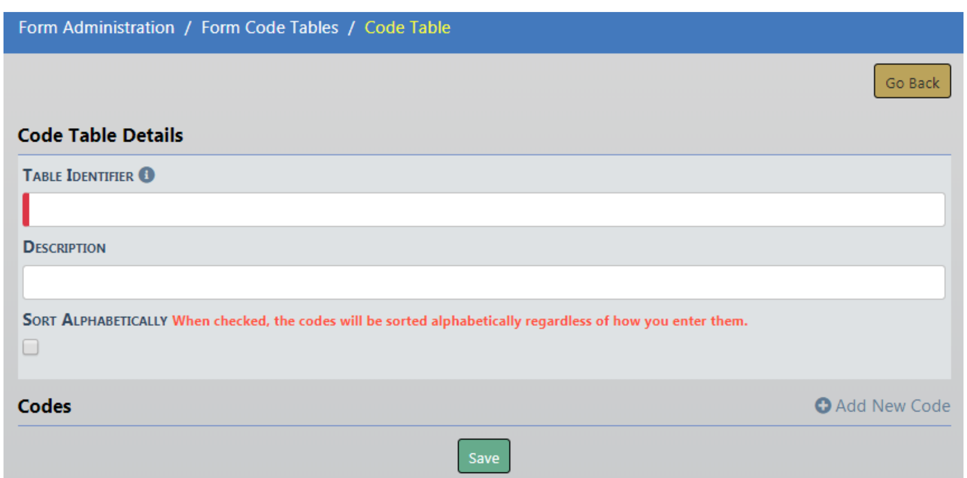
Use the following procedure to manage form code tables.

1. From the *Form Administration* page, click the Manage Form Code Tables link to open the *Code Tables* page as shown.



2. Add a Code Table.

   a. Click the Add Code Table link to open the *Code Table* page as shown.



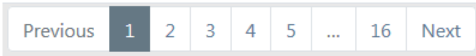
   b. Complete the fields and select the **Sort Alphabetically** button if applicable.

   c. Click the Add New Code link to open fields to enter a new code and its label.

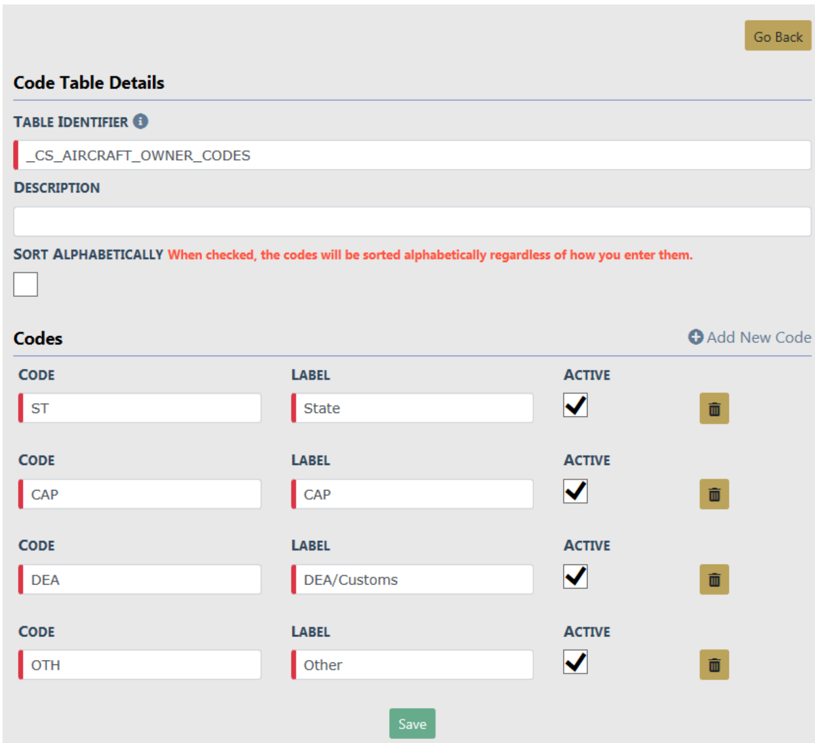
   d. Complete the **Code** and **Label** fields then repeat until you have added all the codes you want for this table.

   e. Click **Save** to save the new table and return to the *Code Tables* page.

3. To locate a code table, use the page buttons at the bottom of the page, or use the Search text box.



4. To edit a code table, click the edit icon  in the **Actions** column.



a. Make changes to existing codes or add new codes (refer to "Add a Code Table. " on the previous page)

b. Click **Save** to save changes.

c. Click **Go Back** to return to the *Code Tables* page.

5. Click **Go Back** to return to the *Form Administration* page.

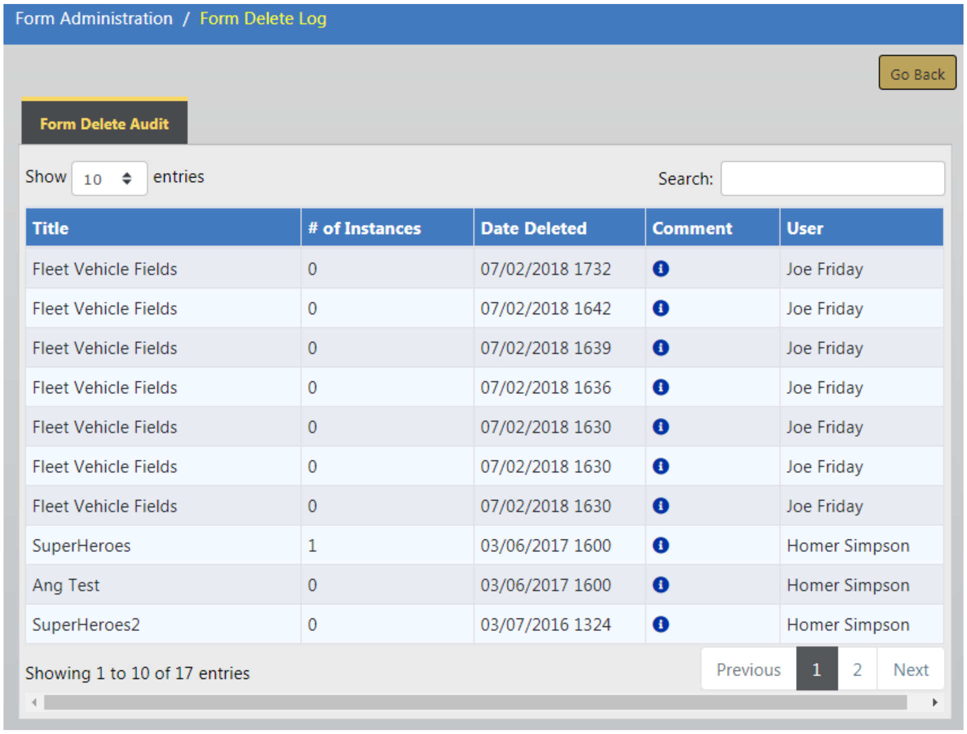
Form Delete Log

Deleted form activity is written to the **Form Delete Log** table automatically with the form title, date it was deleted, comments, and the user who deleted the form.

Note: This table is read-only.

Use the following procedure to access the **Form Delete Log** table.

1. From the *Form Administration* page, click the Form Delete Log link to open the *Form Delete Log* page as shown.

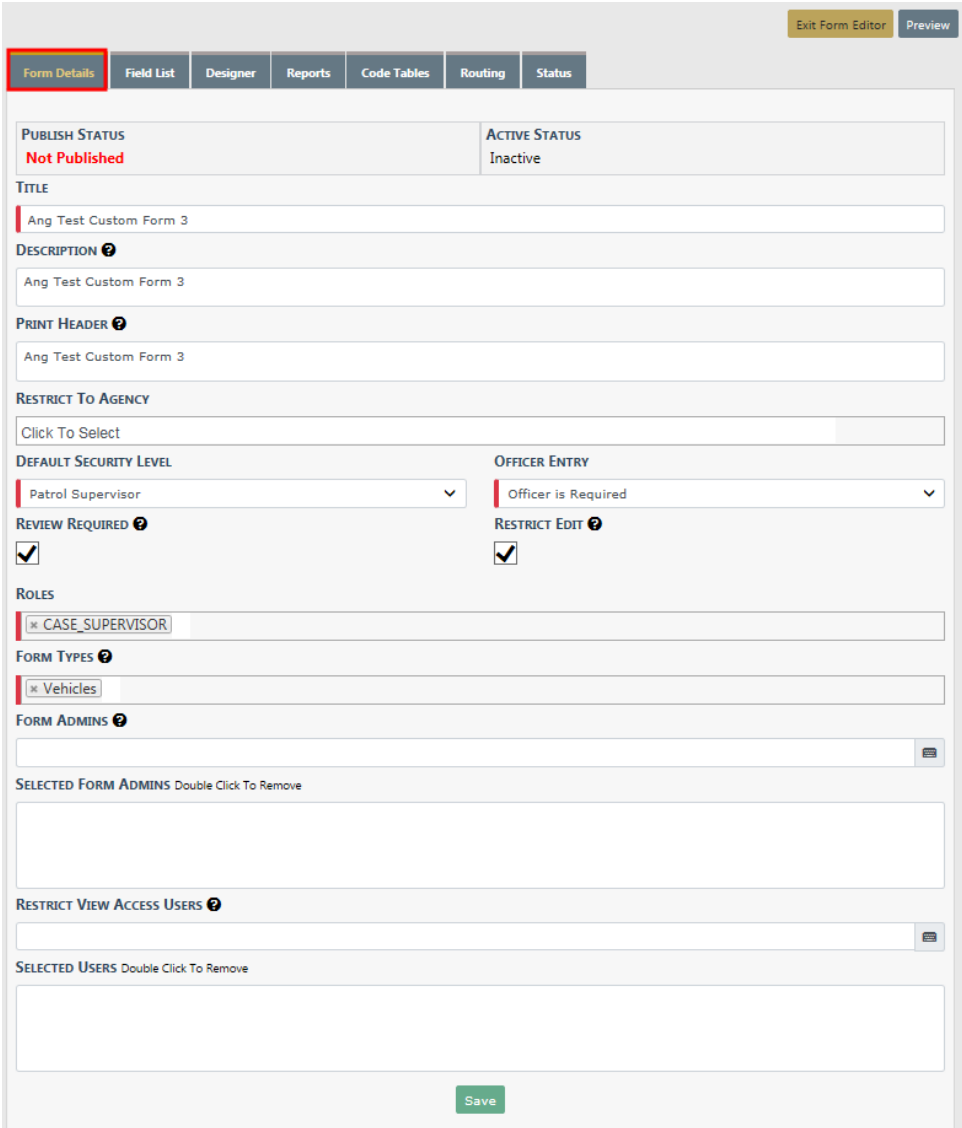


Title	# of Instances	Date Deleted	Comment	User
Fleet Vehicle Fields	0	07/02/2018 1732		Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1642		Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1639		Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1636		Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1630		Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1630		Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1630		Joe Friday
SuperHeroes	1	03/06/2017 1600		Homer Simpson
Ang Test	0	03/06/2017 1600		Homer Simpson
SuperHeroes2	0	03/07/2016 1324		Homer Simpson

2. Hover over or click on the blue information bubble for addition information.

Form Editor

The Form Editor opens as shown below, displaying the **Form Details** tab, when you save a new form.



The Form Editor also displays when you select a form to edit from the *Manage Forms* page after accessing it from the *Form Administration* page.

Note: The only field that cannot be changed once a custom form is published is the **Restrict to Agency** field. All other fields may be modified as long as the form's status is set to *Inactive*.

The Form Editor has seven tabs:

- The **Forms Details** is shown above. It opens upon initial creation of a form when a user saves a new form from the *Add Form* page. It also allows users to change form details after a form has been created.

- The **Number Generation** tab allows the user to configure number generation formats much like the number generation in other modules in Edit Agency. It also allows the user to enable or disable automatic number generation for custom forms. When enabled, a new Instance Number field containing the generated number displays on the view and edit screens. This number is unique to each customer form.

- The **Field List** tab displays a list of custom fields to be used on the form. From this tab, you can add additional fields and edit existing fields.

- The **Designer** tab is used to position the fields on the form.

- The **Reports** tab is used to specify a report for a form type with which the form is associated, including Incidents, Field Arrests, and Contacts.

- The **Code Tables** tab displays a list of Code Tables that the form uses.

- The **Routing** tab is used to specify the who, what, where, and when of form routing details. It also has a setting to allow the creation of an incident during the review process.

- The **Status** tab is used to publish and activate/deactivate forms. The current status of a form is always displayed on this tab.

Click on the **Exit Form Editor** button on the top right to exit the form editor at any time.

Form Details Tab

The **Form Details** tab of the Form Editor is used to manage the form title, define what prints as the header on the printed copy, manage form security, require review, and more.

Use the following procedure to complete the information on the Form Details tab.

1. Enter a unique **Title** for the custom form.
2. Optionally, enter a **Description**. This displays to users who are viewing or editing an instance of this form.
3. Optionally, enter the **Printer Header**. This appears on the top of the first page when printing this form.
4. Optionally, **Restrict To Agency**. Leave blank, or select as many as needed.
5. Select the **Default Security Level** from the list provided.

6. Select the **Officer Entry** from the list provided.
7. Optionally, check the **Review Required** box. A notification appears in a yellow box at the top of the *Submit for Review* page requesting a user review a PDF copy of the form before the creator submits it.
8. Optionally, check the **Restrict Edit** box to restrict the creator of an instance of this form from putting it back into edit mode once it has been approved and finalized. Only a user with special permissions is allowed to do so.
9. Select one or more **Roles**.
10. Select one or more **Form Types**.

Note: If you wish to use this form without having to attach it to a specific record, select **Freestanding Forms** from this list. This allows users to add new instances of this form in the Forms & Report page.

11. Optionally, select **Form Admins**. Users added to this list can administer this form regardless of agency.
12. Optionally, select **Restrict View Access Users**. Only users added to this list can view, print, and search on this form.
13. Click **Save**.

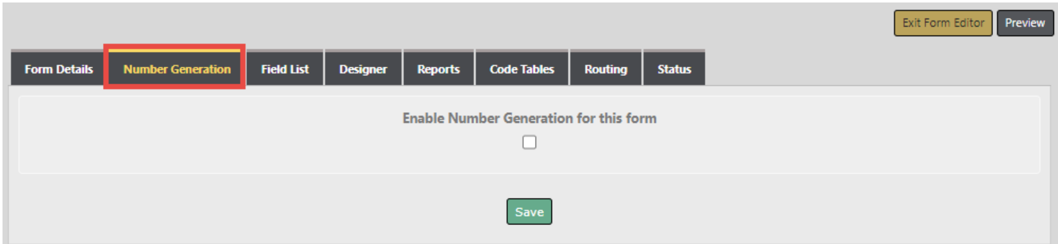
Number Generation Tab

The **Number Generation** tab of the Form Editor is used to configure number generation formats (a unique number) much like the number generation in other modules in Edit Agency, or to enable or disable automatic number generation. When enabled, a new Instance Number field containing the generated number displays on the view and edit screens.

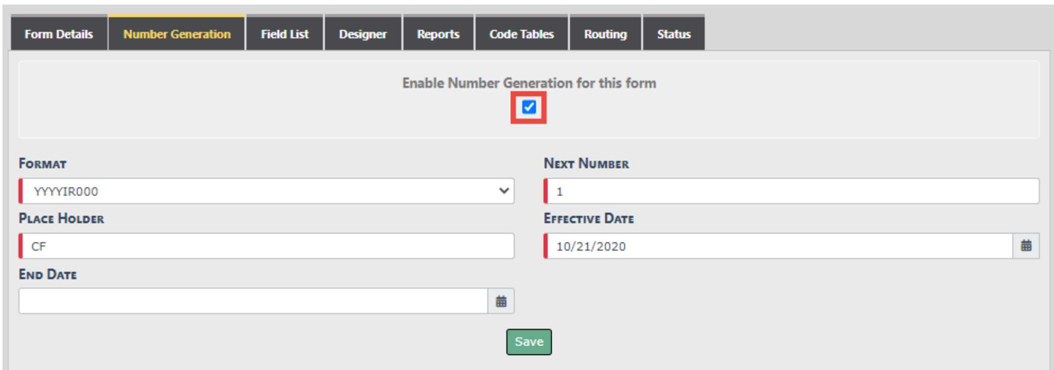
Enable Number Generation

Use the following procedure to enable number generation.

1. From the Form Editor, click on the **Number Generation** tab.



2. Check **Enable number Generation for this Form** to display additional fields.



a. Select a **Format** from this list.

Note: If the format you want is not listed, refer to the Number Generation tab of "Agency Profile" on page 17.

b. Enter the **Next Number**; the beginning number of this series of number. For example, if you want the beginning number to be 1, enter 1.

c. Enter the **Place Holder**. It could be letters or perhaps a hyphen (-). For example, if the number format you are using is YYYIR000 and place holder is CF, then CF replaces the IR in the format.

d. Select the **Effective Date**.

e. Select the **End Date**, if applicable.

f. Click **Save**.

Note: When Number Generation is enabled, a read-only field with the name **Instance Number** appears on the form containing the auto-generated number upon saving the form.

Note: The **Instance Number** also prints on standard Custom Form printouts.

Disable Number Generation

Use the following procedure to disable number generation.

1. From the Form Editor, click on the **Number Generation** tab.
2. Uncheck **Enable Number Generation for this form**.
3. All formatting fields no longer appear.
4. Click **Save**.

Field List Tab

The **Field List** tab of the Form Editor is used to create fields to be used on a custom form.

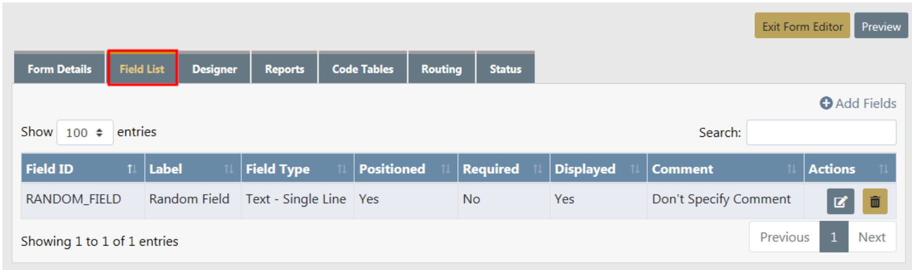
Public facing forms support the following *Custom Form Field Types*:

- Date
- Date & Time
- Text - Single Line
- Text - Multiple Line
- Checkbox
- Radio Buttons
- Select LOV - Single Value
- Auto Complete

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

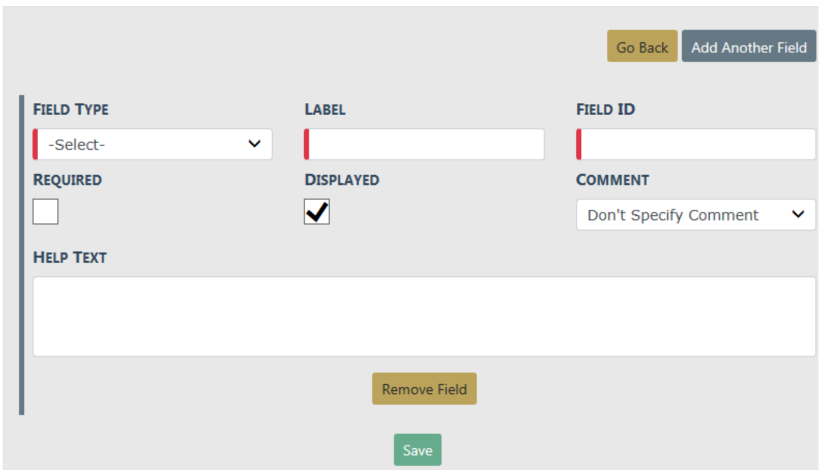
Use the following procedure to set up fields for a form. Keep the above in mind if you are creating a *Public facing form*.

1. From the Form Editor, click on the **Field List** tab to display the **Name Form**.



Note: You also open this page when you save a new form on the *Add Form* page, but the list is empty for a new form.

2. Click the Add Fields link to open the *Add Fields* page as shown in the following examples.

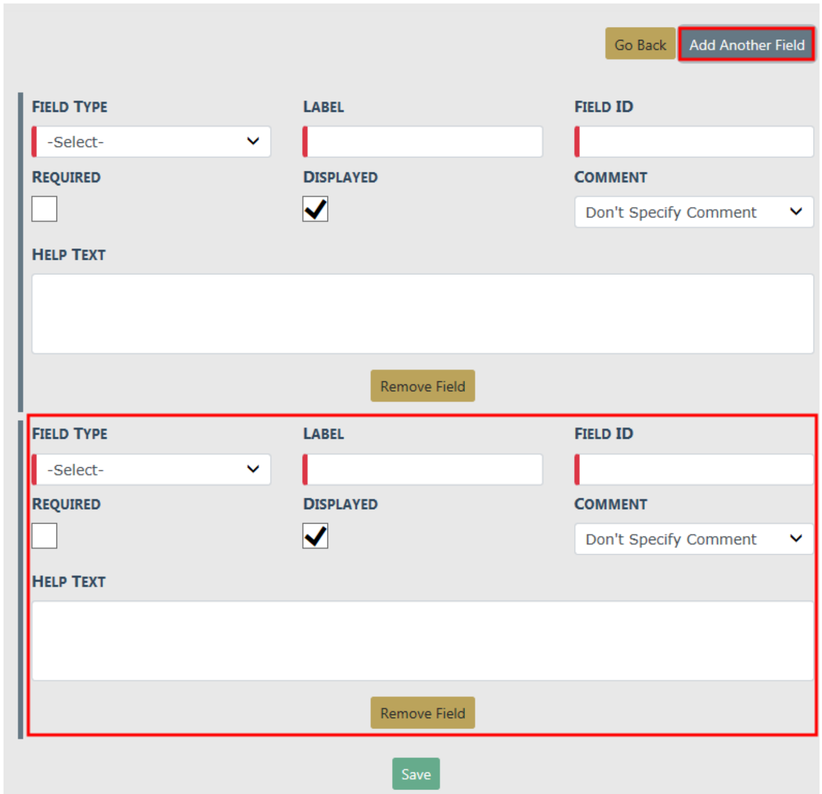


3. Type values in the **Label** field and select to complete the **Field Type** field.

Note: Additional parameters may appear based on the chosen Field Type. For example, if you select the Field Type *LOV*, the required field **Field Code Type** appears and the user must select a value.

4. Enter a value in the **Field ID**.
5. Check the **Required** box if this field is to be a required field.
6. Check the **Displayed** box if this field is to be displayed on the form on screen.
7. Select a **Comment**.
8. Add content to the **Help Text** box if you want to provide instructions about completing this field.
9. You can also perform the following tasks:

- Click the 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.

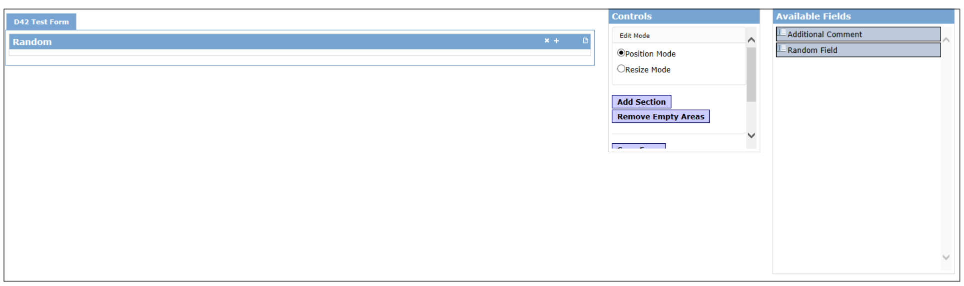
Designer Tab

The fields that were set up on the **Field List** tab are positioned and sized on a form using the **Designer** tab of the Form Editor. The **Designer** tab allows you to layout a form using a drag/drop user interface.

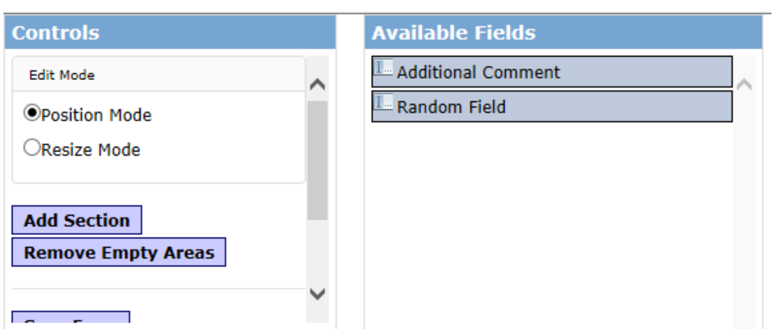
- Use the Position Mode to design the visual layout of a form.
- Use the Resize Mode to adjust the position and size (width) of fields in a row based on a percentage of the total form width.

Use the following procedure to position fields on a form.

1. From the Forms Editor, click the **Designer** tab to open it.
2. Click the Launch Form Designer link to display the form designer page as shown in the example.

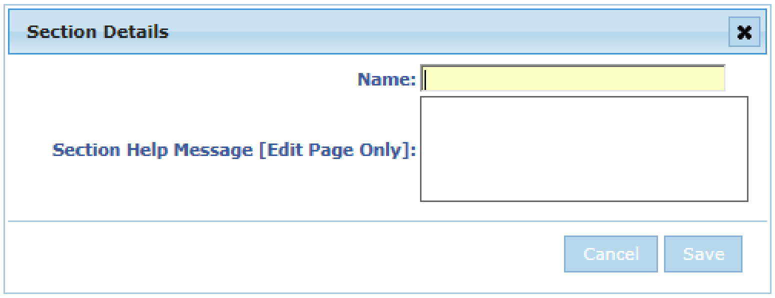


Note: This page does not adjust to the size of the browser window. Scroll to the right to see the **Available Fields** list.

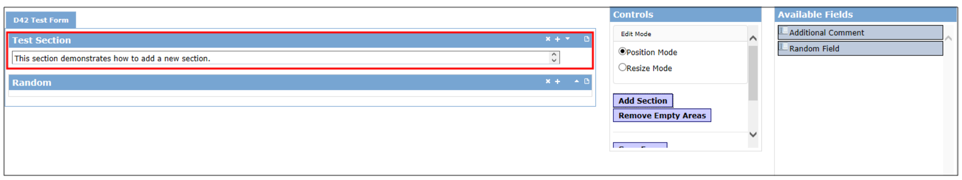


You can drag and drop the **Controls** pane and the **Available Fields** list anywhere on the screen. For example, you might want to drag the **Available Fields** list so that it is located below the **Controls** to make it easier to see all the elements of the screen at once. However, should you close the Form Designer then reopen it, the elements appear in their default positions once again.

3. Click **Add Section** in the **Controls** pane to display the *Section Details* window as shown.



4. Type a name for the section in the **Name** field and a **Section Help Message**. Click **Save** to redisplay the page as shown in the example.



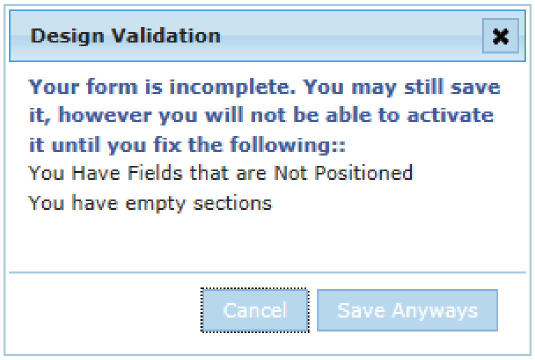
5. Adjust a section as follows:

   - Click **+** in the far right of the new section to add a row, then drag and drop one or more fields into the row.
   - Click **X** to remove a section.
   - To delete a row from a section, click **X** in to the left of the row in the left margin of the section.
   - Rows can hold multiple fields horizontally; however, if you want to add fields vertically, you must add another row.
   - Both sections and rows can be repositioned. Use the drag and drop method or the up and down arrows.

6. Repeat Steps 3 through 5 to add and adjust as many sections as you need for the form.

   Note: You can remove empty sections if you decide you need fewer sections. You can move sections and/or fields as needed by dragging and dropping, and you can revert at any time to return to the form to the state it was at the time you last saved.

7. Click **Save Form** at any time to save the work you have. If the form is not complete, a *Design Validation* box appears giving you the option to save or cancel your design.



- It is important to save often to avoid losing work.
- If needed, the **Revert** button allows you to return the form as it was the last time you saved.
- The **Save Form** button label displays in red if any changes have been made since the last save.

8. Click the **Resize Mode** radio button and adjust the horizontal alignment of fields as needed.

   Fields appear where you can enter alignment values. The values in each box represent a percentage of the total form width. To increase the width of a field or label, type a higher number in the box; to decrease the width of a field or label, type a lower number.

9. When you think the form is complete, save and click **Exit Designer** to return to the **Designer** tab of the Forms Editor.

10. Click **Preview** to review your form.

    - Use the **Switch to...** button to toggle between **View Mode** and **Edit Mode**.
    - Click the **Print** button to open a pdf version of the form to see it as it will appear when printed.
    - If the form needs changes, click **Exit Preview** then click the Launch Form Designer link to display the form designer page again where you can make changes.

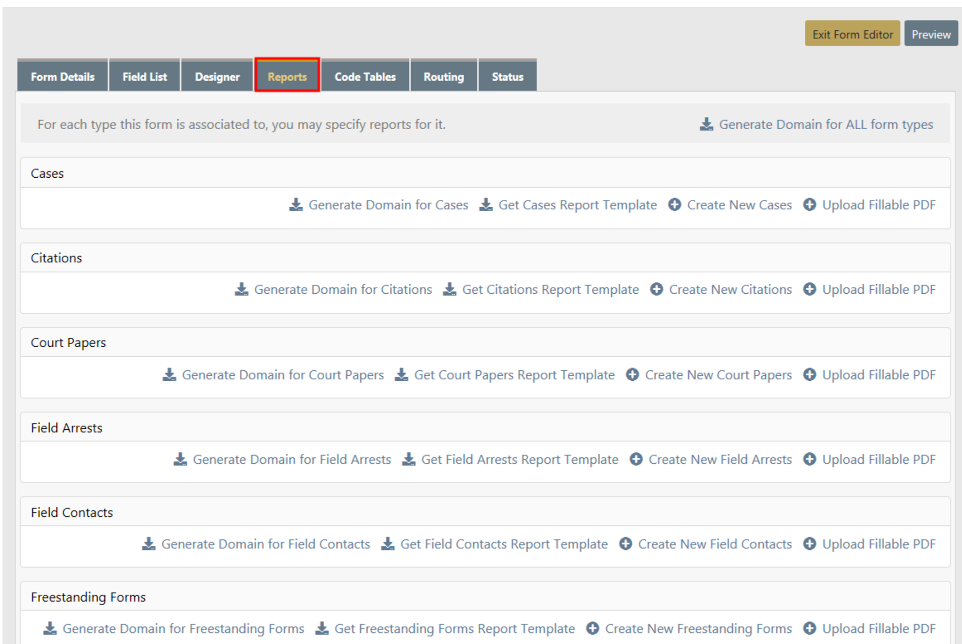
Reports Tab

The **Reports** tab of the Form Editor is used to specify a report for any Form Type with which a form is associated. Form Types include Incidents, Field Arrests, Field Contacts, and Vehicles. Available options are based on Form Type selections made on the **Form Details** tab. Multiple types may be associated with a form simultaneously.

You have the ability to generate form letters and reports by integrating fillable PDFs.

Use the following procedure to download .jrxml template files.

1. From the Form Editor, click the **Reports** tab to open it.



Report Types that were selected on the **Form Details** tab are reflected here.

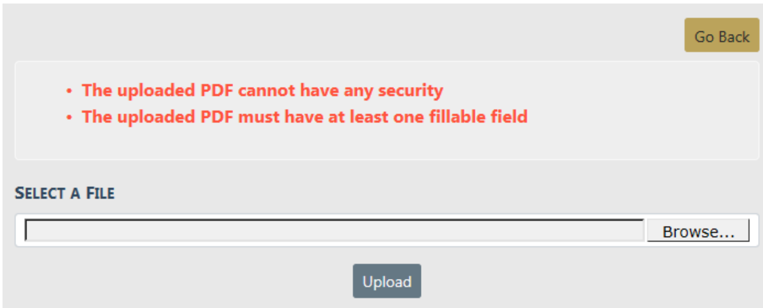
Note: The link titles that appear in blue vary and may not appear exactly as shown in the example.

2. Use the Get...Report Template links to download .jrxml template files of the selected association types. Once they are downloaded you can save the templates then edit them as needed.

3. Optionally use the Upload Fillable PDF link to locate and upload an existing fillable PDF file that has at least one fillable field on it.

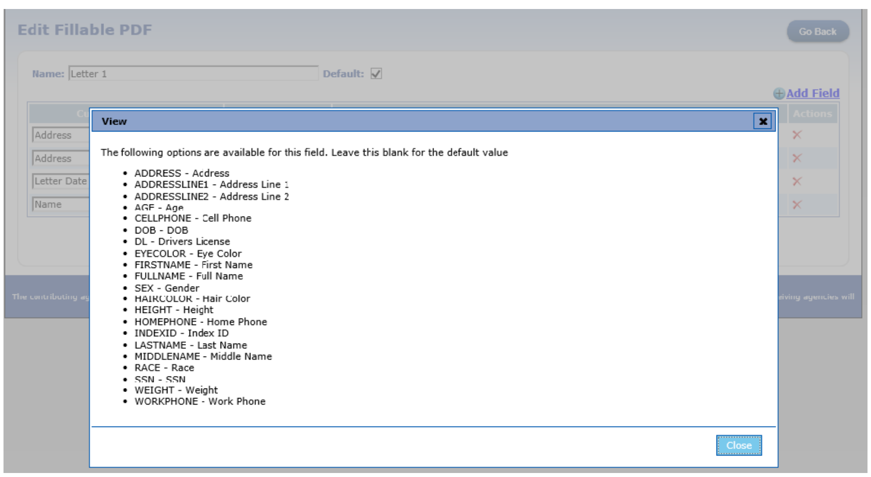
Note: The agency is responsible for procuring the appropriate PDF license that supports the creation of fillable PDFs.

- Click **Browse** to locate the PDF file, then click **Upload**.



- Enter a report **Name** and select **Default** to display this report on the Custom Form for users to print. Multiple fillable PDFs can be associated to one Custom Form. If only one PDF exists, it prints by default regardless if the **Default** option is checked.

- Click the Add Field link to map the Custom Form fields to the Fillable PDF fields.



A Format String (Token) can be entered for how the data should print, or leave it blank for the default.

For example, for a person the string {FULLNAME} {DOB} could be specified. Labels may also be included by entering the string {TOKEN| Optional label}.

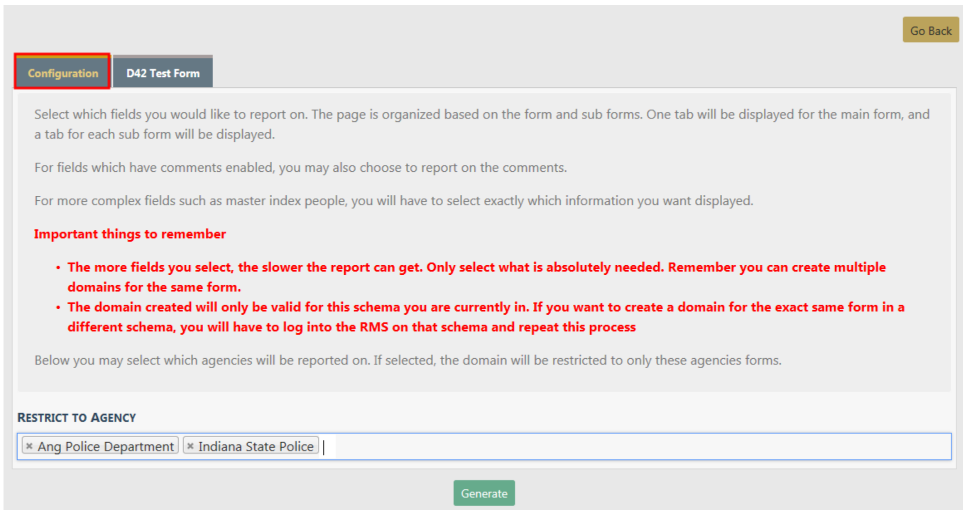
Click on the Blue Info Bubble to view available format options.

Note: Tokens are case sensitive.

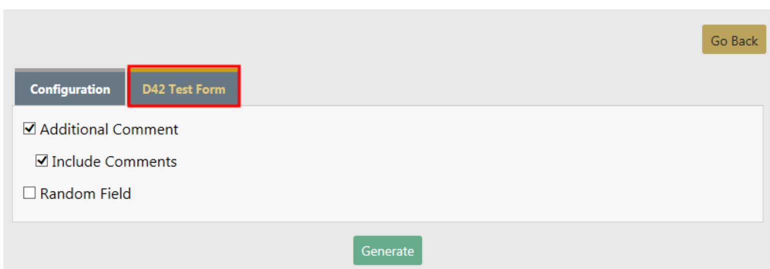
4. Optionally use the individual Generate Domain for... links to select the fields on which to report.

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.

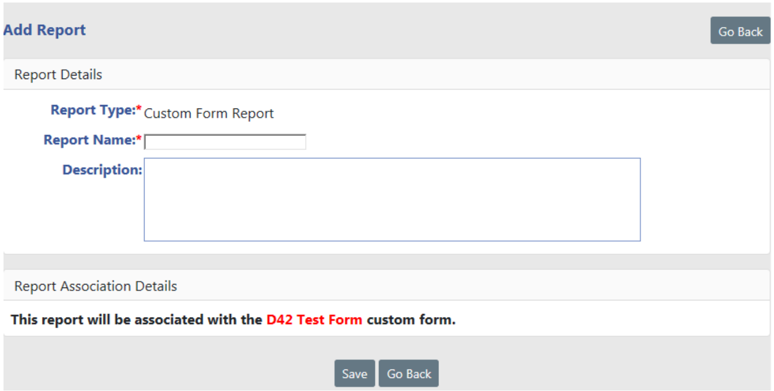


- Click on the second tab and select the fields to include. The title of the second tab is the title you gave the report.



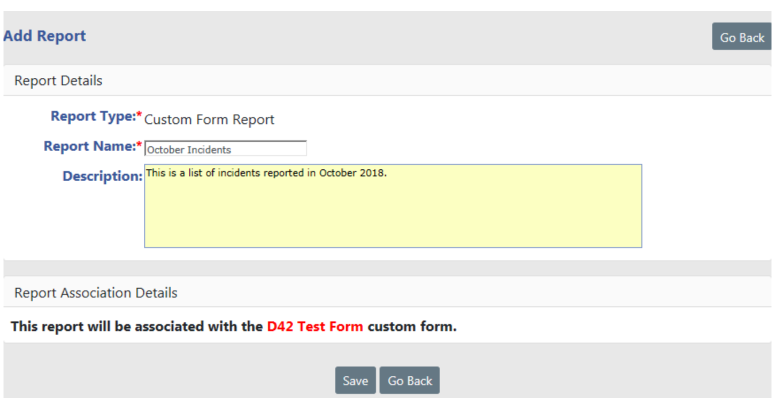
- Click **Generate** to generate and download an XML file.
- In the pop-up window click **Save** to save the XML file to your computer or network, or click **Open** to view the file.
- Click **Go Back** to return to the previous window.

5. Use any Create New... link to open the *Add Report* page as shown.



- 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.



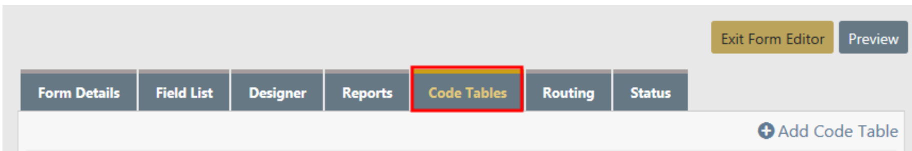
7. If needed, make changes and click **Save**.
8. Click **Exit** to return to the Form Editor as shown in Step 1 with the new report listed in the appropriate grid.

Code Tables Tab

The **Code Tables** tab of the Form Editor is used to list code tables used by the form for specified lists of values (LOV) fields, or pick lists, fields and to add code tables.

Use the following procedure to add and edit code tables associated with a form.

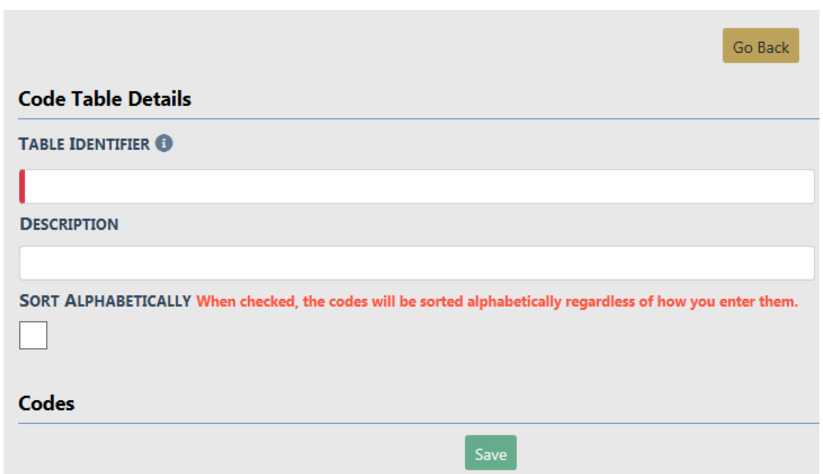
1. From the Form Editor, click the **Code Tables** tab to open it.



If the form has been set up to use one or more code tables for LOVs fields, the tables are listed here. The **Code Table ID** and, if entered, the **Description** of each table display, and the edit icon in the **Actions** column provides the ability to edit the table.

2. To add a custom code table, continue as follows:

- Click the Add Code Table link to open the *Code Table* page as shown.



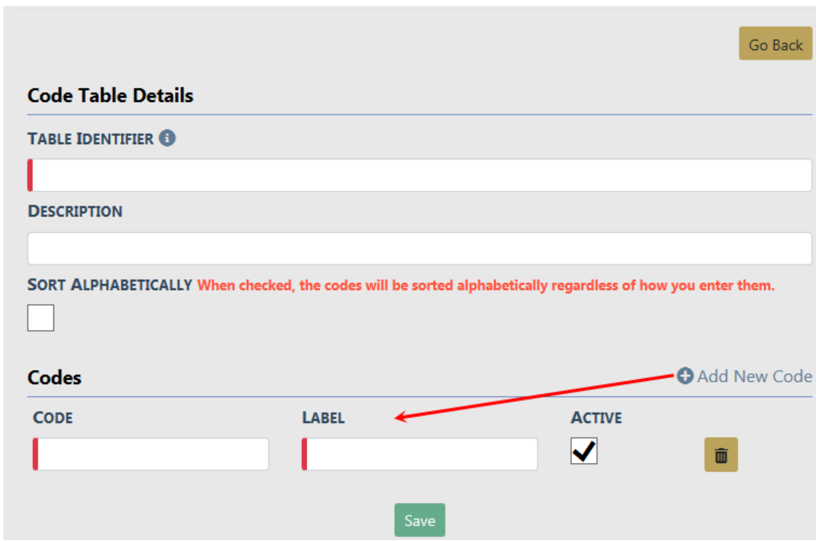
- Complete fields as follows:
  - **Table Identifier** – Enter a label to assign to the code table to differentiate it from other code tables. This label must be all upper case alpha-numeric characters with no spaces. Underscores are allowed. _CS_must be added to the label as a prefix to conform to the naming convention for code tables. **Note:** This is a required field, and the record is not saved properly without a valid label.

- **Description** – Enter a description of the custom code table.
- **Sort Alphabetically** – Check the box if you want codes to be sorted alphabetically regardless of how they are entered.

• Click **Save**.

3. To add a code to the table, continue as follows:

• Click Add New Code to open a **Code** field, a **Label** field, an **Active** box and a delete icon across the bottom of the page as shown.



• Complete the **Code** and **Label** fields.

• Click **Save**.

4. To edit a code table, click  in the **Actions** column (see example in Step 1 above) to display the *Code Table* page.

Note: Code tables can be used by more than one form. A list of forms that use this code table display in the yellow banner in the middle of the page.

5. Continue as follows:

• Make changes to any field or box except the **Table Identifier** field. To change this value, you must delete the table and start over.

• Use the delete icon to delete any unneeded codes.

• Click Add New Code to add a new code. (See Step 3.)

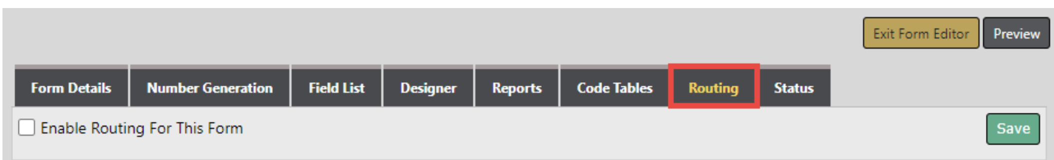
- When changes are complete, click **Save**.

Routing Tab

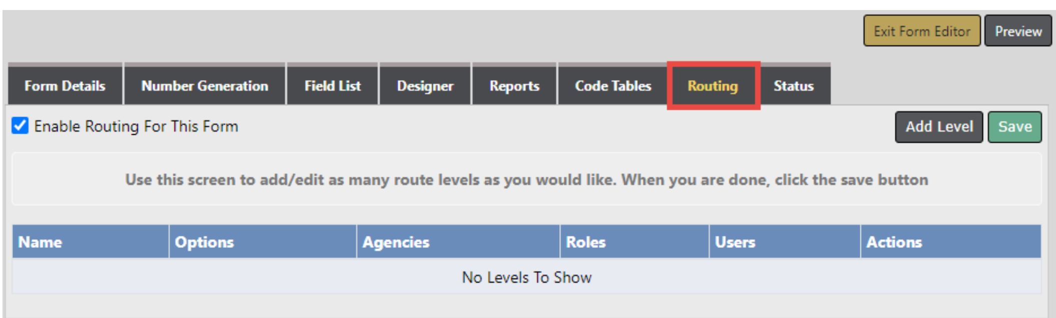
Custom forms can be routed in a way similar to Incident Report routing. Notifications are sent to designated users, roles, and/or – in a statewide organization – agencies. From the Form Editor, the administrator can set up one or more levels of routing as needed, entering comments that are included in the notifications sent to routing recipients.

Use the following procedure to set up routing for a custom form.

1. From the Form Editor, click the **Routing** tab to open the tab as shown.



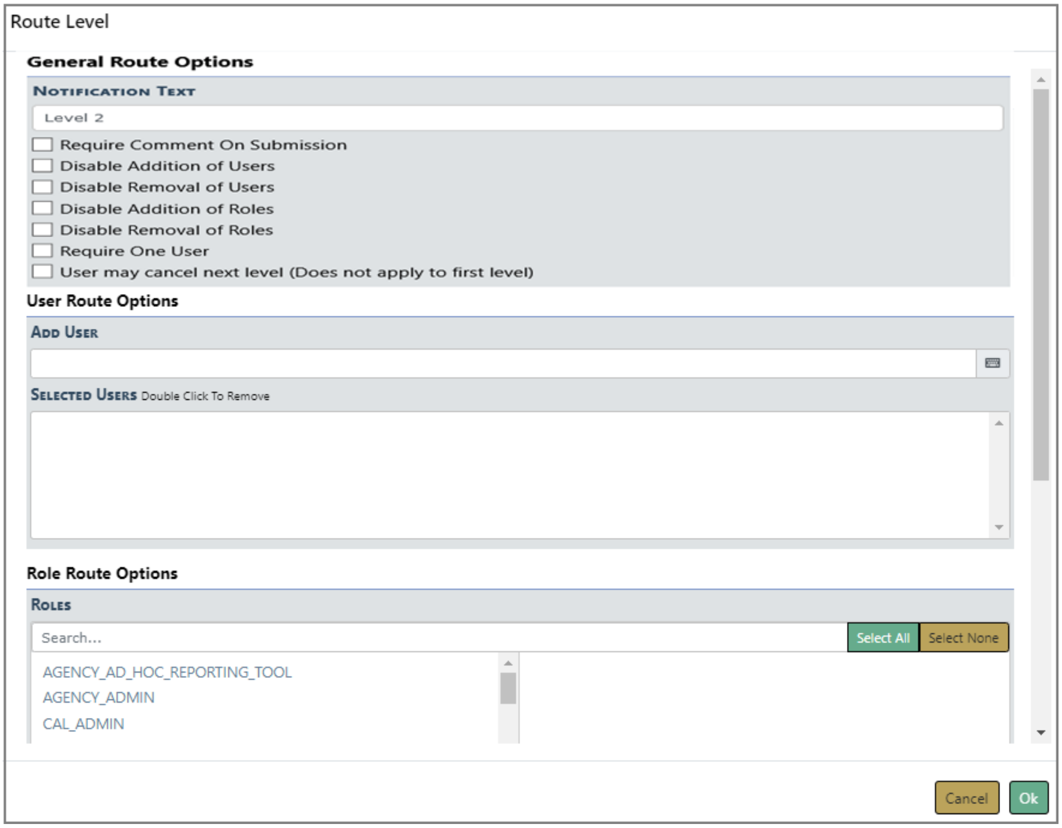
2. Check the **Enable routing for this form** box to enable and display the tab as shown.



Note: If routing is not enabled for a form, review submission is not required.

Note: With Online RMS 11.5 and higher, multi-tier routing has been added to route a form through multiple levels of review.

3. Select the **Add Level** button on the right to open the *Route Level* form.



4. In the **General Route Options** section:

   a. Check the **Require Comment On Submission** box if you want to require a comment when the user summits it.

   b. Check the **Disable Addition of Users** box if you want to prevent users from adding additional users.

   c. Check the **Disable Removal of Users** box if you want to prevent users from removing users.

   d. Check the **Disable Addition of Roles** box if you want to prevent users from adding additional roles.

   e. Check the **Disable Removal of Roles** box if you want to prevent users from removing roles.

   f. Check the **Require One User** box to require the selection of a user at time of route generation.

   g. Check the **User may not cancel next level (Does not apply to first level)** box if you do not want users to cancel the next level.

5. In the **User Route Options** section, specify which users are to receive notifications. Click into the **Add User** box and begin typing a user's name, then select the appropriate user from the list. The selected user appears in the **Selected Users** box

automatically. **Double-click** on a **Selected User** to remove them from the selected list.

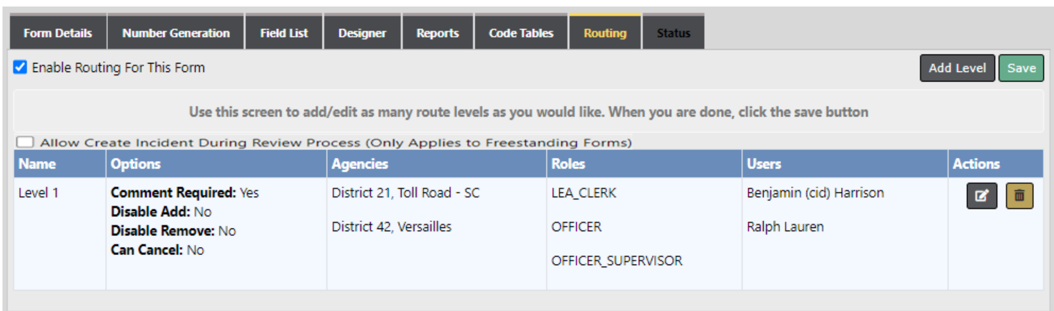
6. In the **Role Route Options** section establish which users are to receive notification by role.

a. Choose **Roles**.

a. Choose **Agencies**.

Note: Statewide organizations also have the ability to choose route to specific agencies. If no agency is selected, the form automatically routes to the form creator's agency.

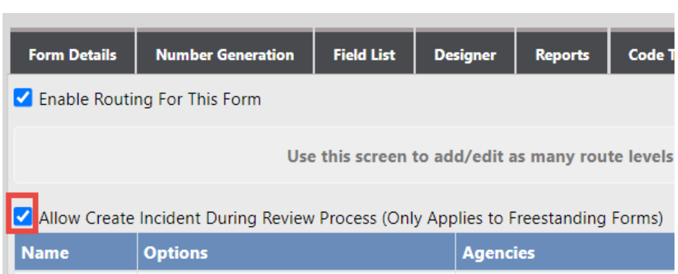
7. Click **Ok** to add the route to the Routing tab.



Note: Clicking **Ok** creates your route level only. To save your changes to the database, you must also click the **Save** button when finished adding route levels.

8. Optionally, click the **Add Level** button again to add an additional level, and repeat until all desired levels are complete.

9. Optionally, check the **Allow Create Incident During Review...** checkbox.

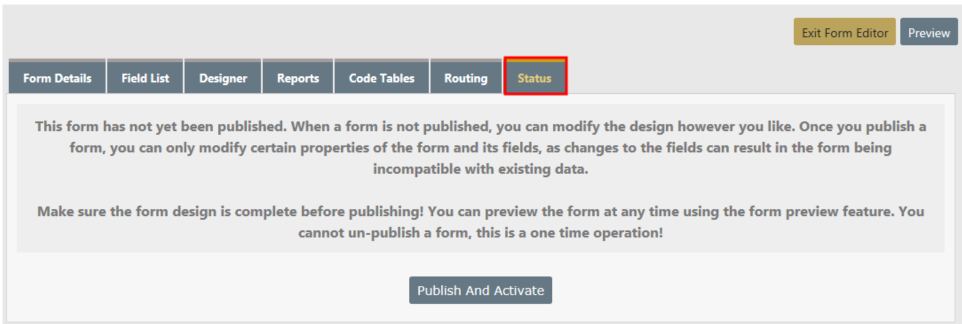


Checking this box allows users with appropriate permissions to create an incident during the form review process.

10. Click **Save** to commit your changes to the database.

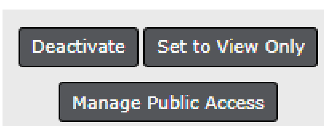
Status Tab

From the Form Editor, click the **Status** tab to open it. The **Status** tab is used to publish and activate the form. Current status of the form is always displayed on this tab. It is important that the form is 100% complete and ready to be used before publishing it because some details cannot be changed after the form has been published.



The **Publish and Activate Form** button is available only if the form has not yet been published. Click it to set the Published Status to *Published* and the Active Status to *Active*.

The following buttons appear once the form has been published:



Community Reporting with Custom Forms

In response to COVID-19, Caliber Public Safety is offering a new product feature with Online RMS 11.3.2 to support **Community Reporting** of minor crimes, tips, and other police-related events. The **Community Reporting** feature leverages the power of Online RMS *Custom Forms* for your agency to embed a public form in an existing website using only a couple lines of HTML code.

With this enhancement, your agency can create their **Community Reporting** public forms using the *Custom Forms* module and make the forms available to the public via your agency's website.

Benefits of **Community Reporting**:

- Promote social distancing by reducing officer to public interactions for minor police reports.

- Better service your community by reducing non-essential contacts to ensure officers are available to provide help when emergencies arise.
- Keep officers on patrol and protecting communities by offering an alternate method for the public to report minor police reports without the need to dispatch an officer.

This section provides instructions on how authorized Caliber Online RMS users administer and configure the **Community Reporting** feature.

Agency Responsibilities

The following are the responsibilities of the agency when requesting the **Community Reporting** feature and implementing *Public Custom Forms*:

- Contact your *Caliber Customer Success Manager (CSM)* or enter a support request to sign-up for **Community Reporting**.
  - Caliber will add the **Community Reporting** (*Public Custom Form*) feature to your agency setup.
- Agency administrators are responsible for creating and managing *Custom Forms* or assigning privileges to other agency personnel to create and manage *Custom Forms* for public availability.
- Maintain and manage your agency's existing public-facing agency website.
- Modifications to your agency's website to add **Community Reporting**.
  - Caliber recommends that a system or website administrator perform the modifications.

Once your agency has access to the **Community Reporting** feature, follow these steps to implement *Public Custom Forms*:

1. “Permissions and Settings” on page 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.

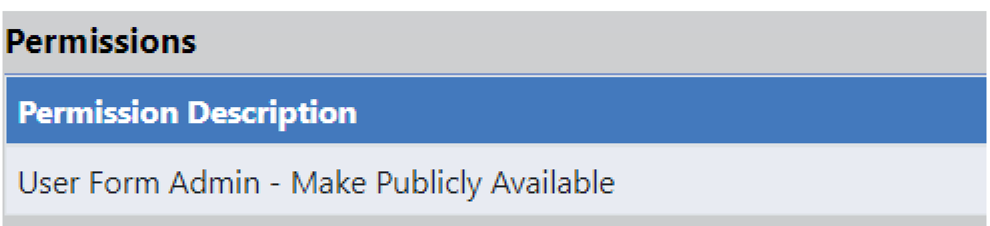
Permissions and Settings

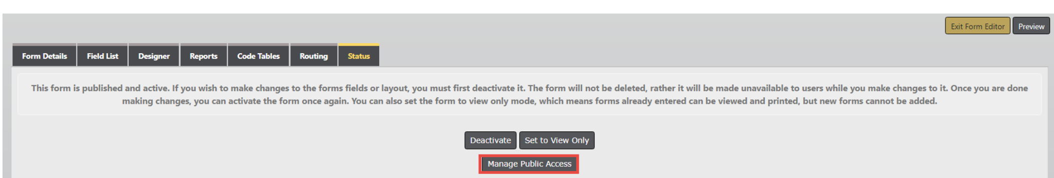
There are two permission categories for public form access and management:

- *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*).





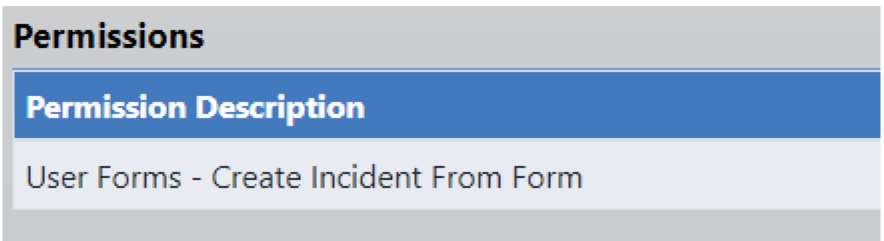
The *Agency Admin* role has this new permission category by default. Assign the **User Form Admin - Make Publicly Available** permission category to other roles as needed.

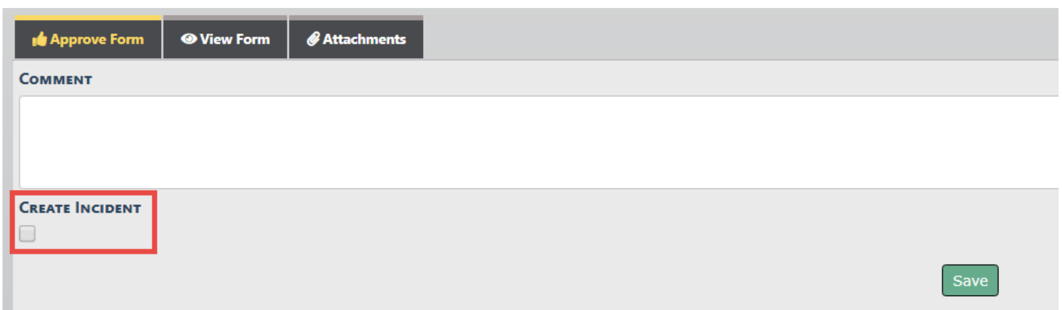
Note: For more information on Permission Categories, refer to “Permission Categories” on page 173.

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.





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.

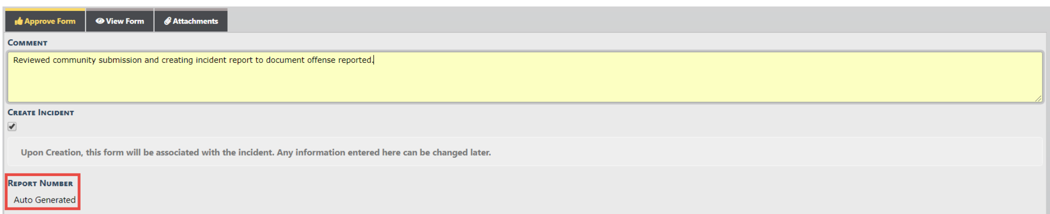
If your agency does not have an active *Number Generation format* configured, select one of the following options to generate an incident report from a publicly available custom form:

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.

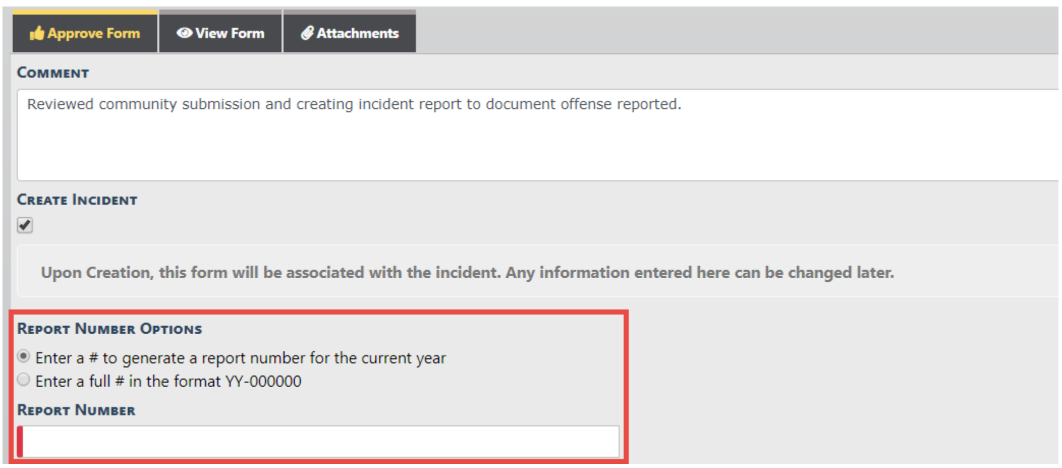
Note: If you need assistance, please call *Caliber Customer Support*.

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.

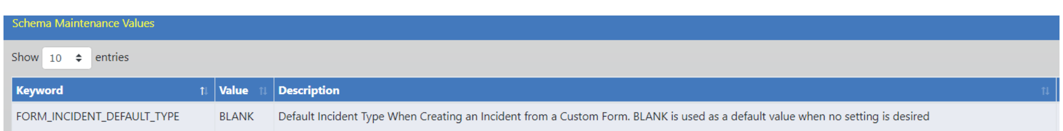
3. Once configured, users are required to type the number provided from *Caliber CAD* when selecting **Create Incident** from a publicly available custom form to generate the incident report in *Online RMS*.



Maintenance Values

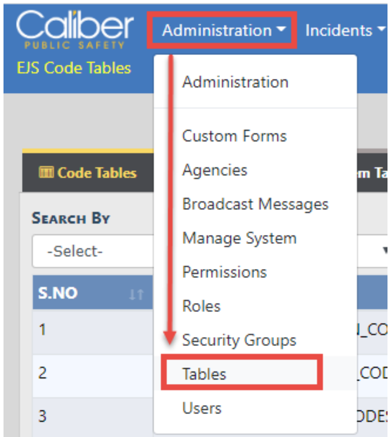
Set the Default Incident Type for Incident Reports

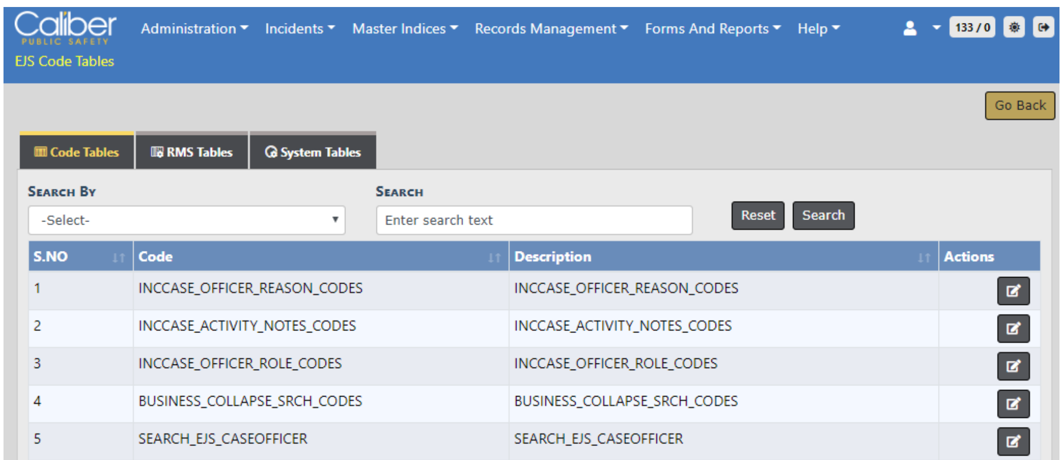
For agencies using **Incident Report Types**, a new **Agency Maintenance** setting is available to default the **Incident Type** for Incident Reports created from a publicly available *Custom Form*.



With appropriate permissions, you can apply settings by following these steps:

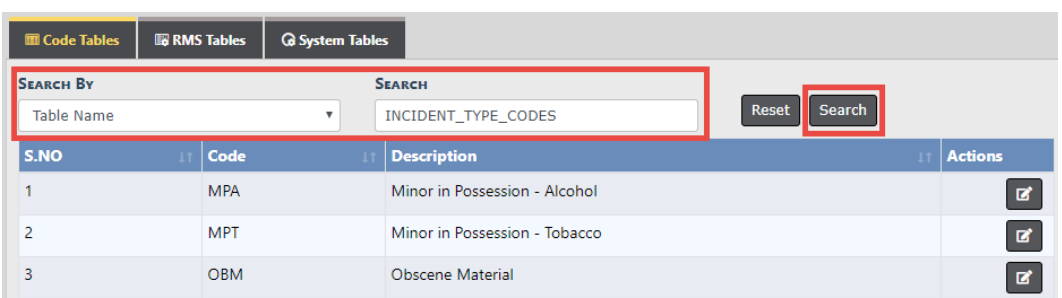
1. Click on **Administration** on the top menu, then click **Tables** to open *EJS Code Tables*.





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.

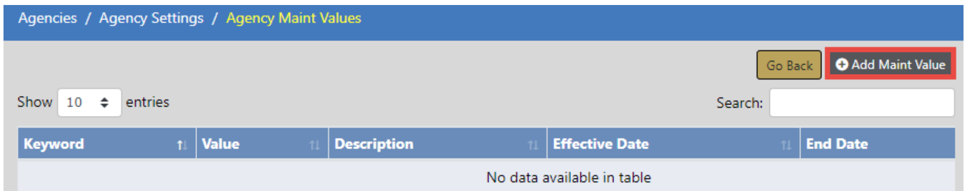
   b. If the **Incident Type** *does not exist*, and you have the proper permissions, add a new **Incident Type**, then proceed to the next step.

4. Enter the **Code** as a *Maintenance Value*.

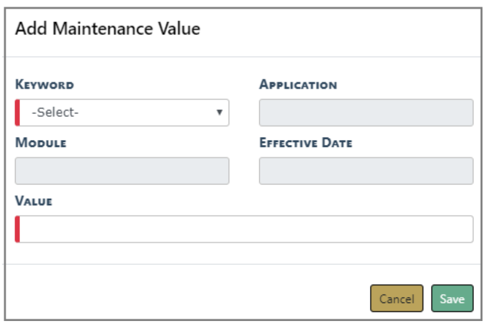
a. Access the *Maintenance Value* table through the Agency Profile.

For instructions, refer to “Access Maintenance Values” on page 344.

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:

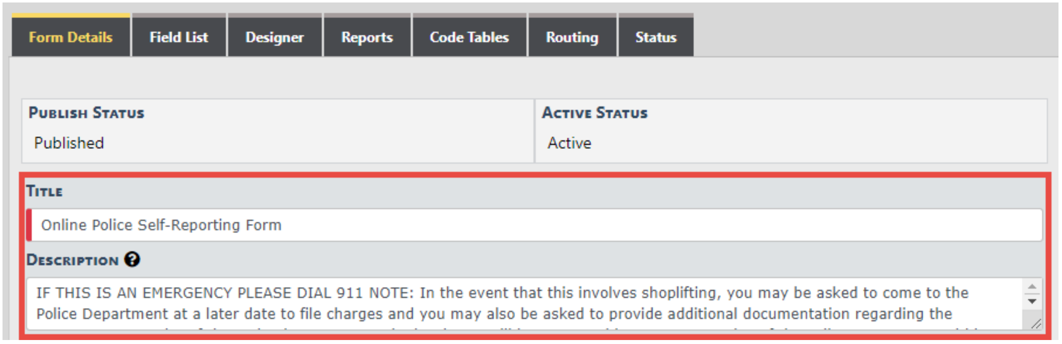
1. Create a *Custom Form* containing fields you wish to present to the public.

For more information on *Custom Forms*, refer to “Custom Forms” on page 235.

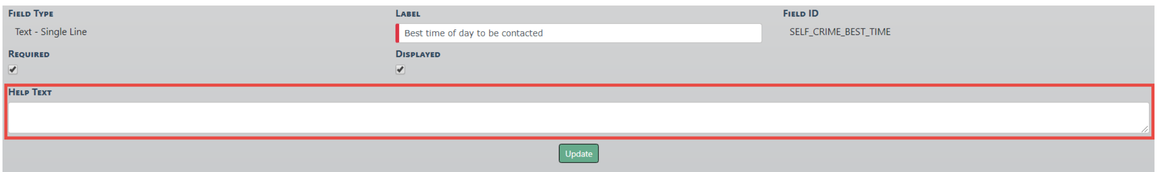
Publicly Displayed Data

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.



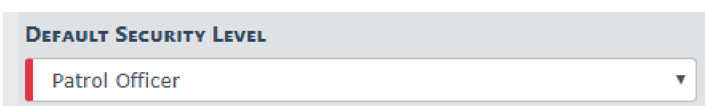
- **Help Text** for each Field Type.



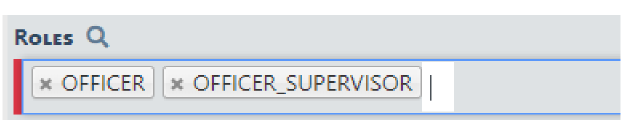
- Form **Section Groups** from the *Designer* tab.

2. Configure **Default Security Level**, **Roles**, and **Form Types** on *Form Details* tab.

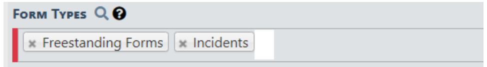
   a. Set the **Default Security Level** at a level equal to the lowest level of the user security you want to access the form.



   b. Set the user **Roles** that will have access to view the *Public Custom Forms* within Online RMS. It is suggested these **Roles** be the same as **Roles** configured on the *Routing tab* to *Review Forms* submitted by the public.

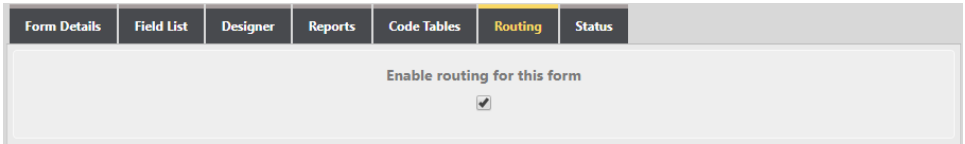


   c. For *Publicly Available* forms that you want to *Create Incidents* from the submission, you must set the **Form Types** to **Freestanding Forms** and **Incidents**.

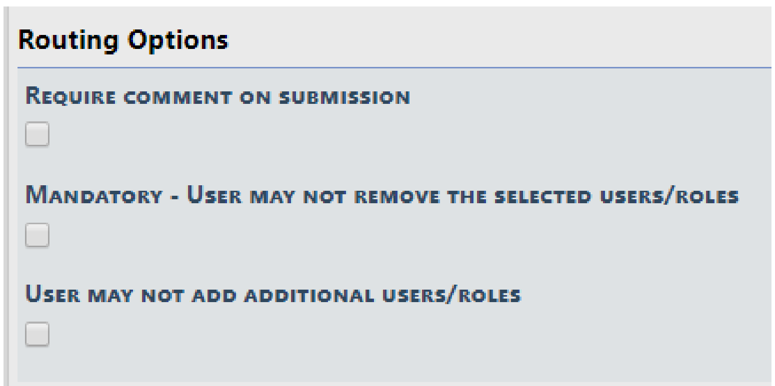


3. Configure **Routing** on the *Routing* tab.

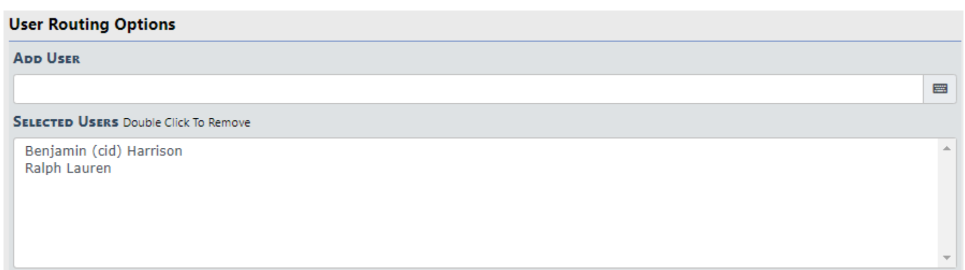
   a. Check the **Enable Routing for this form** checkbox.



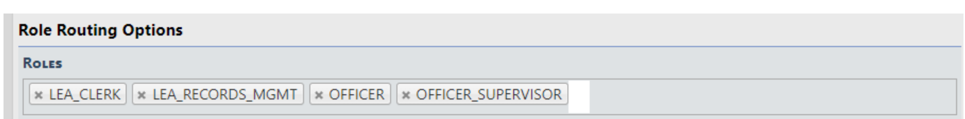
   b. The **Routing Options** checkboxes do not apply to publicly submitted forms. Checking these do not have an impact on publicly available *Custom Forms*.



   c. Select **User Routing Options**. Select individual users to notify when a public form is submitted.



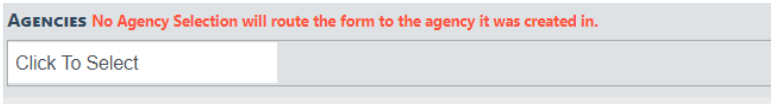
   d. Select **Role Routing Options**. Select user **Roles** to notify when a public form is submitted.



   e. Select **Agencies**.

      Leave blank to route to the agency defined on the Token for the public available *Custom Form* **(recommended)**.

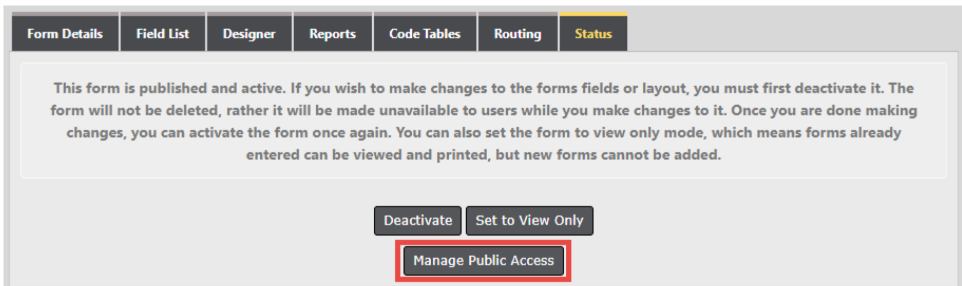
      Add an agency if you wish to route to a different agency than designated on the Token for the public available *Custom Form*.



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.



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, you would enter *www.myagency.com* for **Allowed Domains**.

e. Click **Save**.

f. A unique **Token ID Number** generates for the agency and form combination upon saving.

g. **Copy** the Token by **using your mouse to highlight the Token**, then pressing **Ctrl + C** keys on your keyboard at the same time.

Agency	Token
Caliber Public Safety PD	a21e1d1d-e578-4fe1-a57a-ed7868173b46

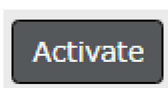
h. For **multi-tenant sites or agencies** configured as an Organization with sub-agencies, the same *Custom Form* can be made publicly available on different websites or web pages within the same website to route public submissions of the form to various agencies.

Select the **Create Token** button and enter the information to generate a unique Token for each agency and website/page combination, then enter the Token on the appropriate web page.

When the public completes and submits the form from your website, a *Custom Form* submission generates for the agency associated to the Token ID used to embed the public form on that web page.

Agency	Token
Burlington Police Department	59c40c00-ea85-40a6-96d6-503ea1549459
Caliber Public Safety PD	b27fdfe7-fecc-4686-97a9-dc6c98c91317
Model County	37acd52f-7ec2-4749-9573-20d7e2ffb95b

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 <u>one line</u> to the end the **<head>** section, and <u>one line</u> within the **<body>** section *where the custom form information should display*.

Below is a simplified example of a web page and how it should be modified to enable **Community Reporting**.

– The **id** is the **Token ID** generated for the *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 -->
    <script src="https://community.public-safety-cloud.com/assets/custom-form-bundle.js"
crossorigin=""></script>
  </head>
  <body>
    <!-- (Existing content) -->
    <!-- ... -->
    <!-- In the desired location, add the following line for Caliber Community Reporting -->
    <caliber-custom-form id="12345678-abcd-1234-abcd-1234567890ab">
    </caliber-custom-form>
    <!-- ... -->
  </body>
</html>
```

1. Modification labeled **1** tells the internet browser where to find the JavaScript that displays the *Custom Form* from Online RMS.

   Note: **Do not modify the contents of this line**. Any changes to this line may cause the *Custom Form* not to display and may break other functionality of your web page.

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
hide-images="false"	Hides the section of the form that allows the end-user to submit a JPEG image which will be attached to the ***Custom Form*** in *Online RMS*.
hide-title="false"	Removes the ***Custom Form's Title*** from the form when displaying on your website. This may be useful if the web page has an existing title/heading that you prefer to use.
hide-description="false"	Removes the ***Custom Form's Description*** from the form when displaying on your website. This may be useful if the web page has an existing description that you prefer to use.
hide-section-headers="false"	Removes the ***Custom Form's* Section** Group label from the ***Custom Form*** 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 <u>not</u> want to display the **Custom Form Title** on the web page, use *hide-title-e="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*.

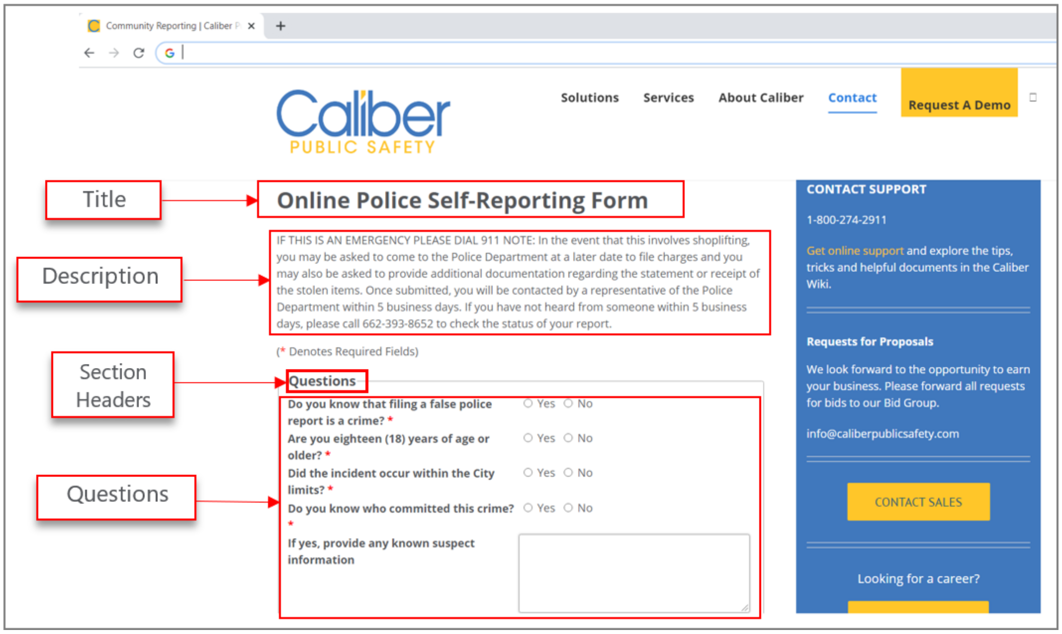
```
<caliber-custom-form
          hide-images="false"
          hide-title="false"
          hide-description="false"
          hide-section-headers="false"
          id="12345678-abcd-1234-abcd-1234567890ab">
</caliber-custom-form>
```

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:



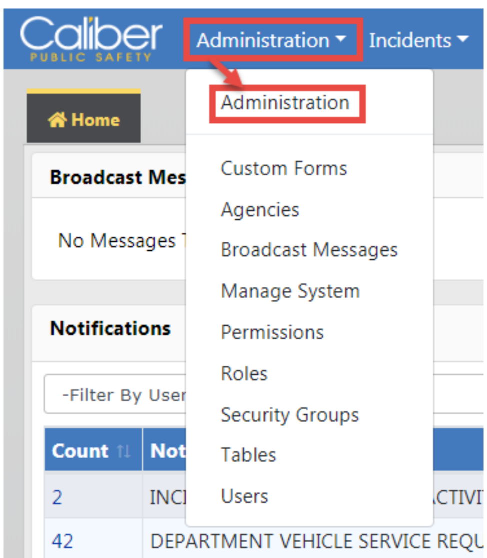
Community Reporting | Caliber P
Solutions
Services
About Caliber
Contact
Request A Demo
Caliber
PUBLIC SAFETY
Title
Online Police Self-Reporting Form
Description
IF THIS IS AN EMERGENCY PLEASE DIAL 911 NOTE: In the event that this involves shoplifting, you may be asked to come to the Police Department 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.
(* Denotes Required Fields)
Section Headers
Questions
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
Questions
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

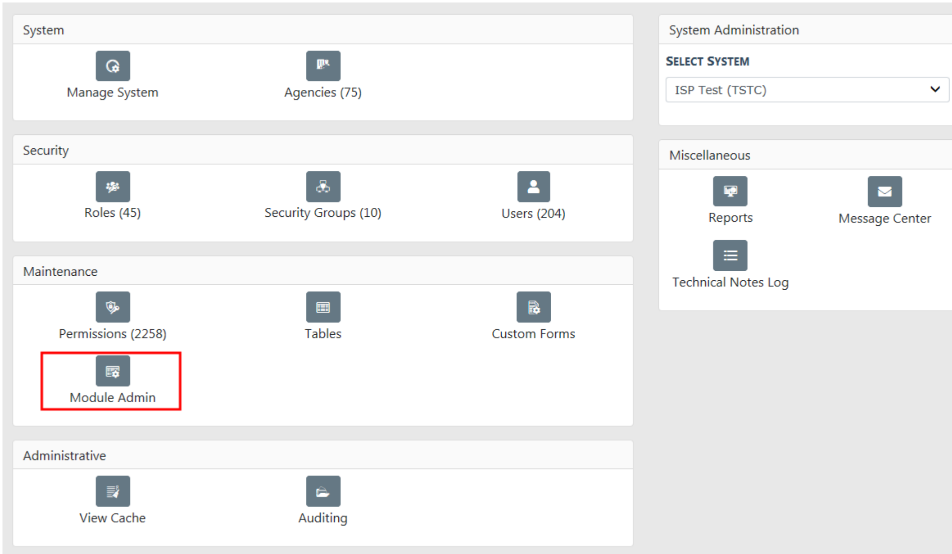
The Module Admin feature must be enabled by Caliber Public Safety personnel in order for an agency to use it. In addition, only administrative users who have been assigned the appropriate role can access and manage the Module Configuration page.

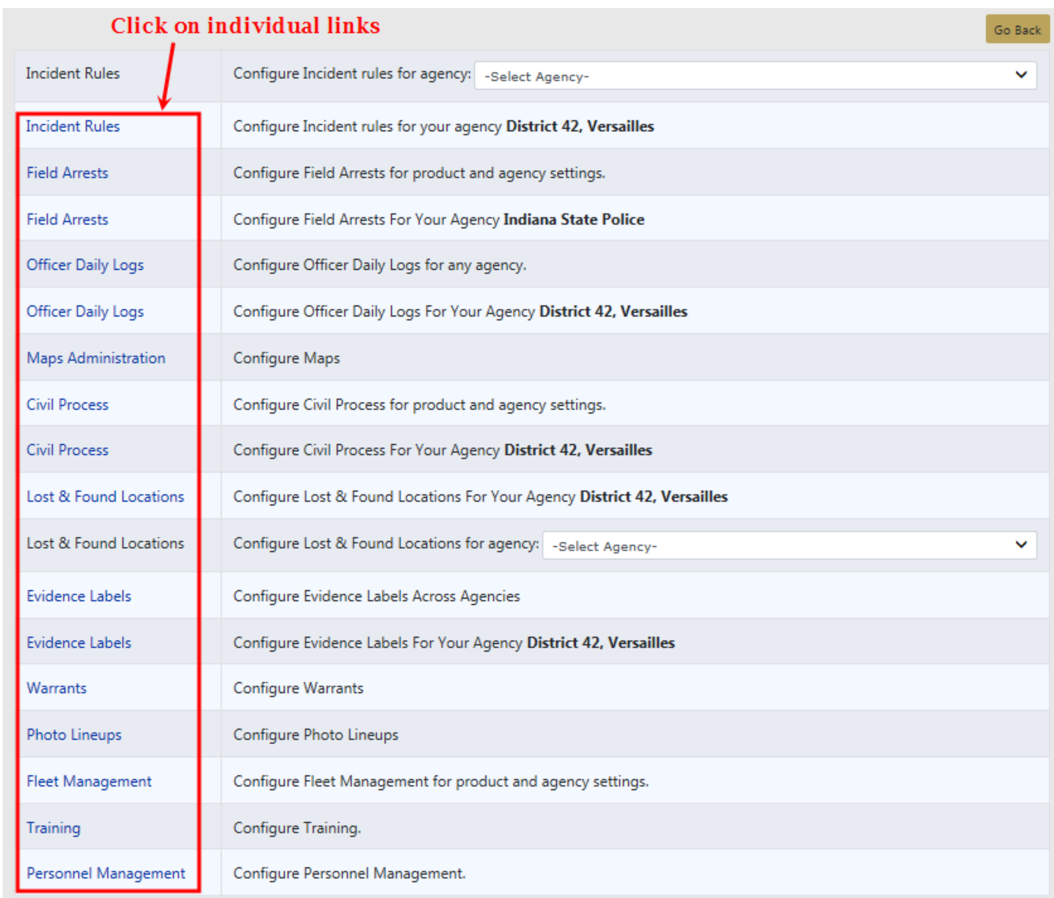
Access Module Admin

Click on the **Administration** label, then **Administratio**n 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

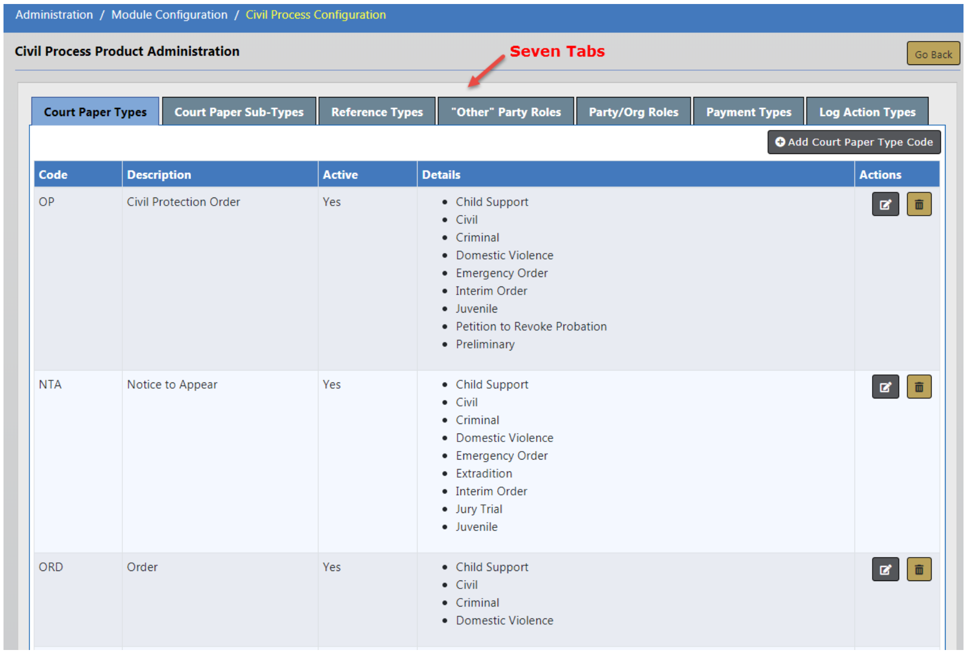
Product configuration options include the following:

- 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 **District 42, Versailles**

The *Product Config* table opens with the seven configuration options in separate tabs across the top, resting on the **Court Paper Types** tab by default.

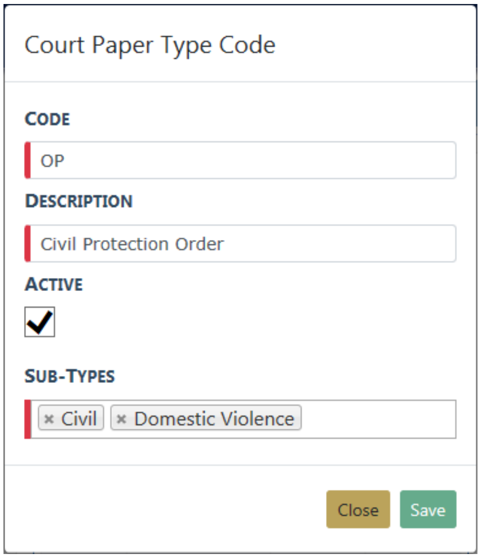


Click on the individual tabs to access the different options. With the appropriate permissions, you can add, edit, and delete settings within each tab. While the data differs with each configuration option, the functionality remains consistent.

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.



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

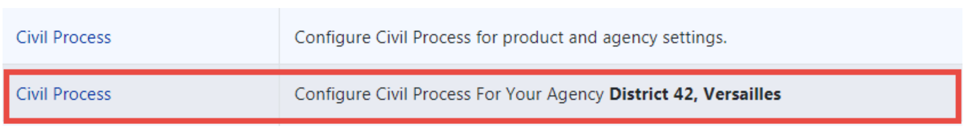
1. Locate the record you need to delete from the table.

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.



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.

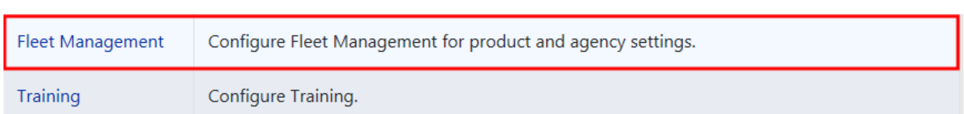
Click the **Go Back** button on the upper right of the page to return to the *Module Configuration* page.

Fleet Management Settings

Configuration options include the following:

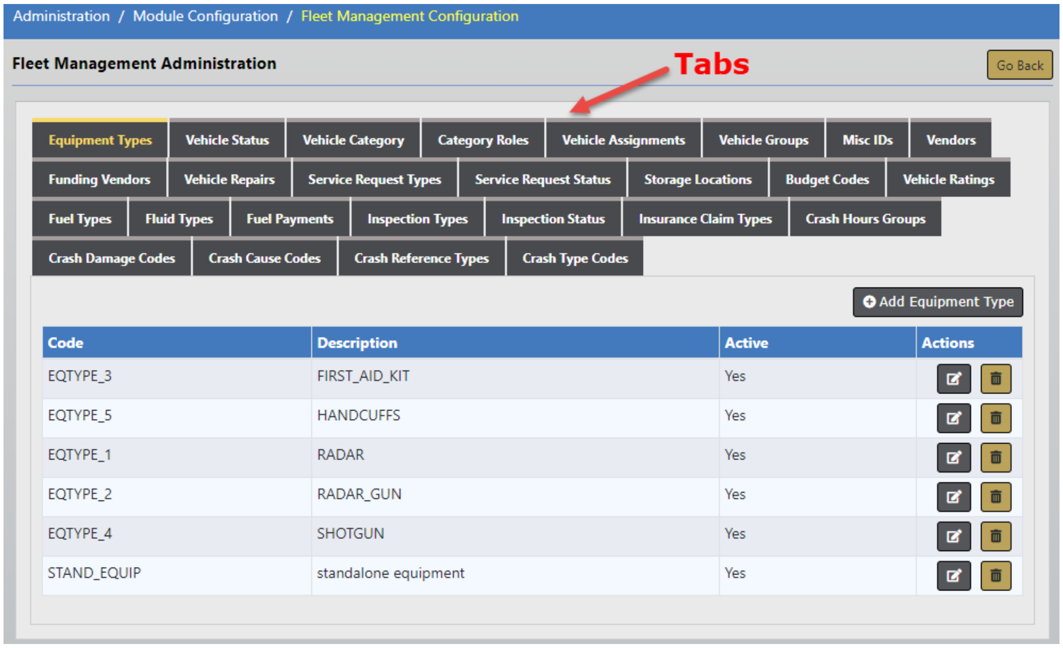
- Equipment Types
- Vehicle Status, Vehicle Category, Vehicle Assignments, Vehicle Groups, Vehicle Repairs, and Vehicle Ratings
- Category Roles
- Misc IDs
- Vendors and Funding Vendors
- Service Request Types and Service Request Status
- Storage Locations
- Budget Codes
- Fuel Types and Fuel Payments
- 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.

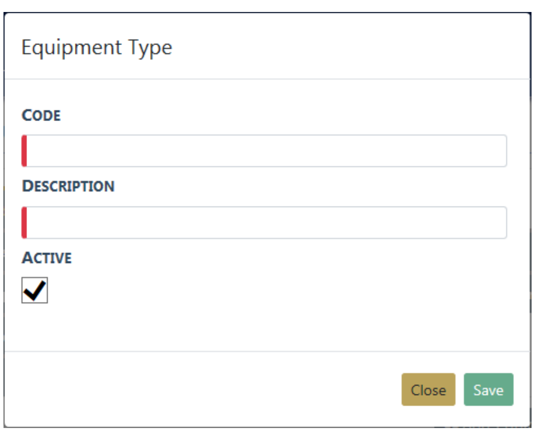


Click on the individual tabs to access the different options. With the appropriate permissions, you can add, edit, and delete settings within each tab. While the data differs with each configuration option, the functionality remains consistent.

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.



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.

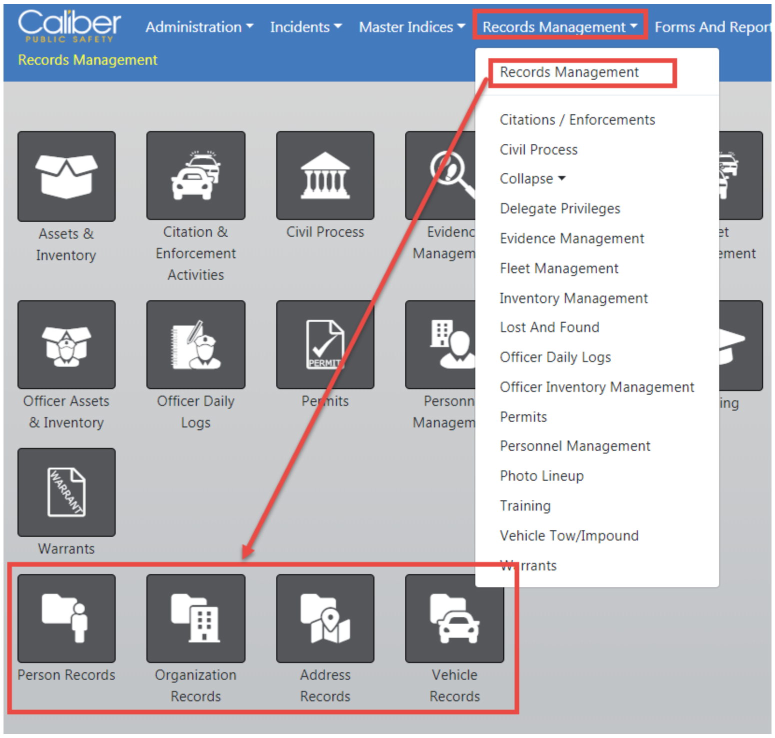
There may be times when users inadvertently create a duplicate master person, address, vehicle, or organization in Caliber Public Safety Online RMS. The agency administrator, with proper permissions, can identify and collapse duplicates records, creating one master person, address, or organization record.

Access Collapse Process

There are two ways to access the **Collapse** process.

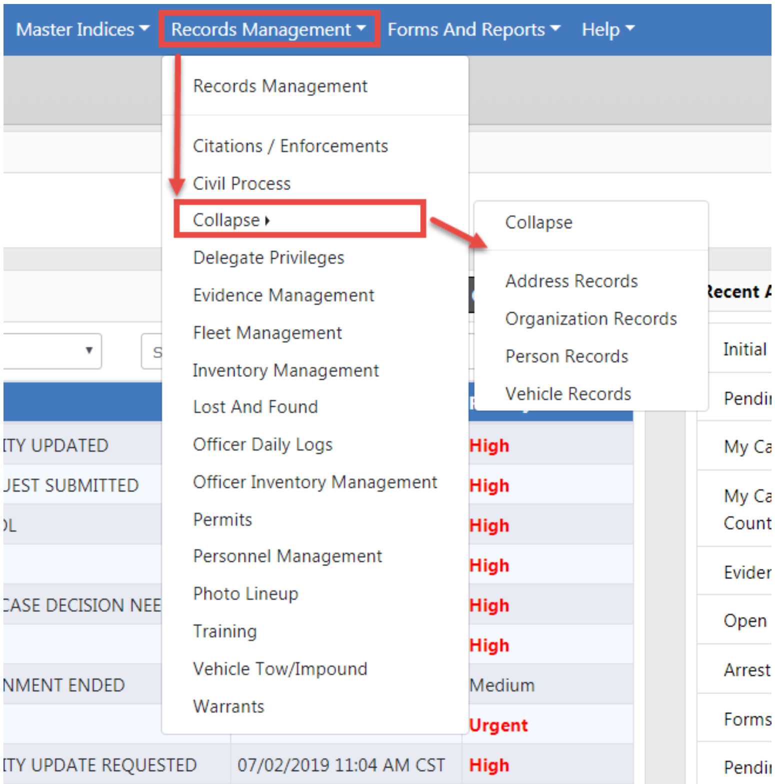
Option 1

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

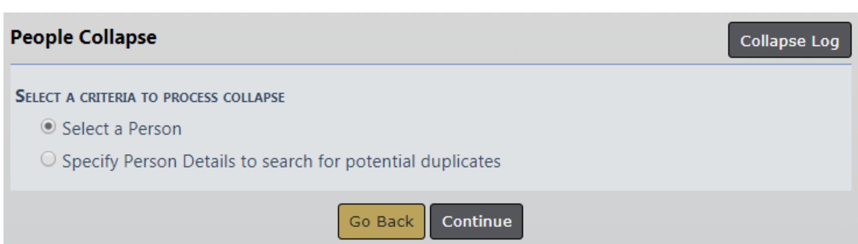
Select **Person Records**, **Address Records**, **Organization Records**, or **Vehicle Records** from the **Records Management** drop down menu.



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.)



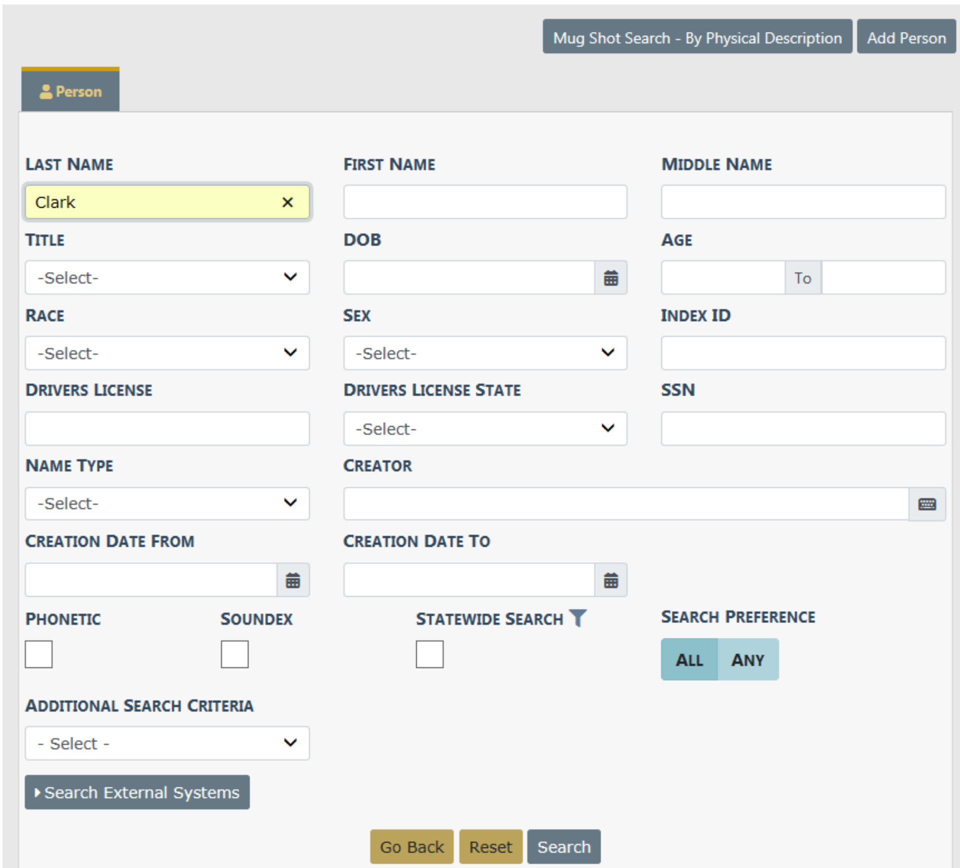
2. You must select one Master Person record as the *primary* record, and at least one Master Person record as the *duplicate*.

You can either manually search for and identify the duplicates, or you can let the system search for potential duplicates based on the search criteria you enter.

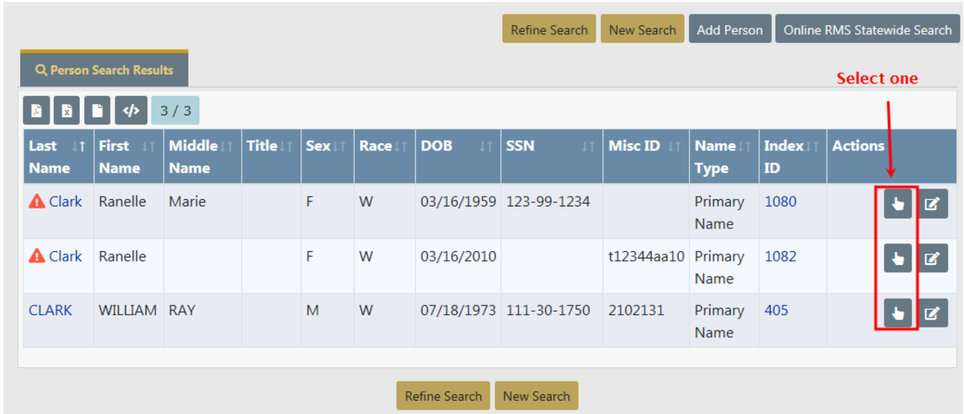
Select one option then follow the applicable steps below:

Select a Person

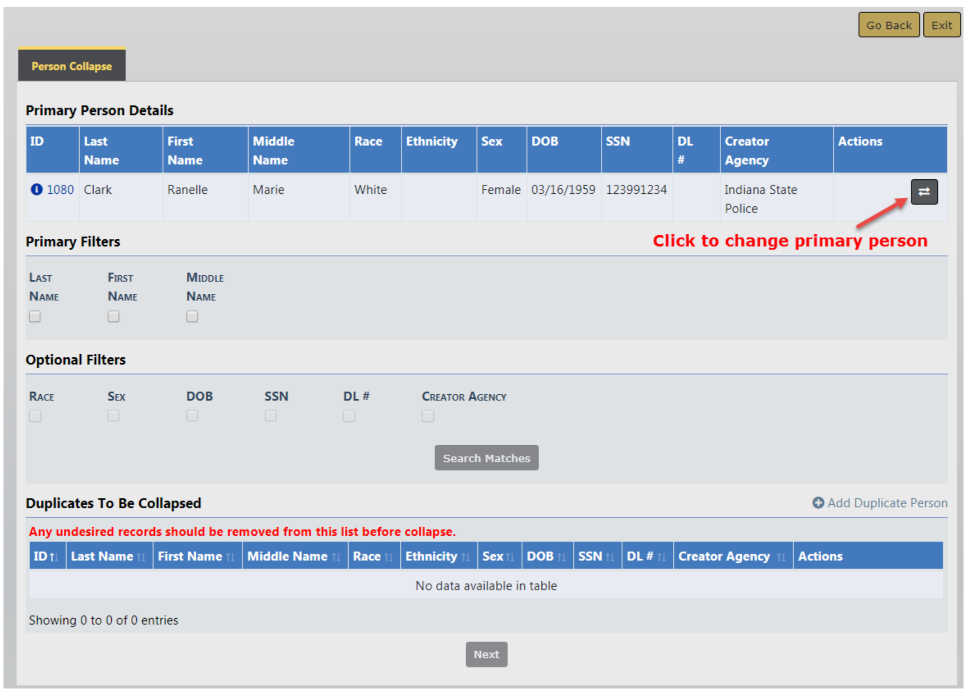
a. Select this option to manually search for and identify duplicates, then click **Continue** to open the *Master Index Search* page.



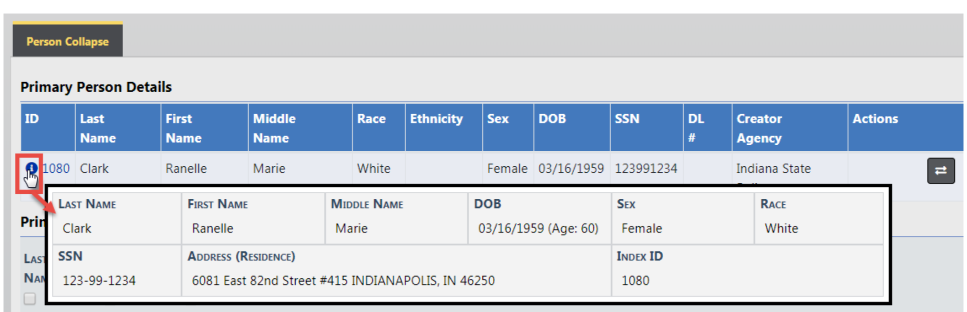
b. Enter your search criteria then click **Search** to display the *Person Search Results*, then select the *Master Person* you want to use as the *primary* record.



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.

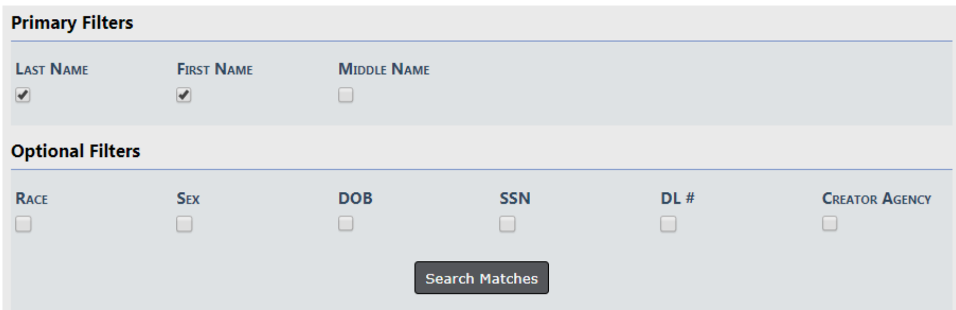


Hover your mouse over the **blue information bubble** to view detailed information about the Master Person record.



d. You can search for the duplicate Master Person record by selecting specific **Filters** that match with the primary person, or click the **Add Duplicate Person** link to manually search for a specific Master Person record using your own search criteria.

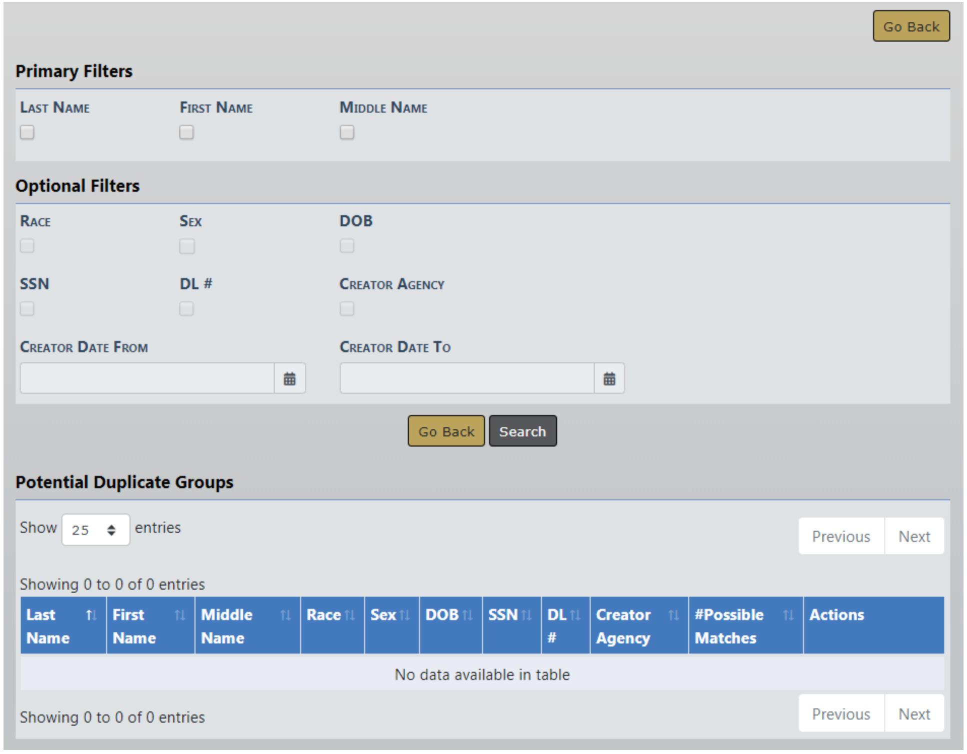
As a **Filter** example, select the **Last Name** and **First Name** filter buttons to search for other Master Person records that share the same last and first name as the Primary Person, then click **Search Matches** to display a list of potential duplicates. Buttons turn green when selected and those that have not been selected are gray.



e. Click the select icon in the *Actions* column to select the *New Primary Person Record*.

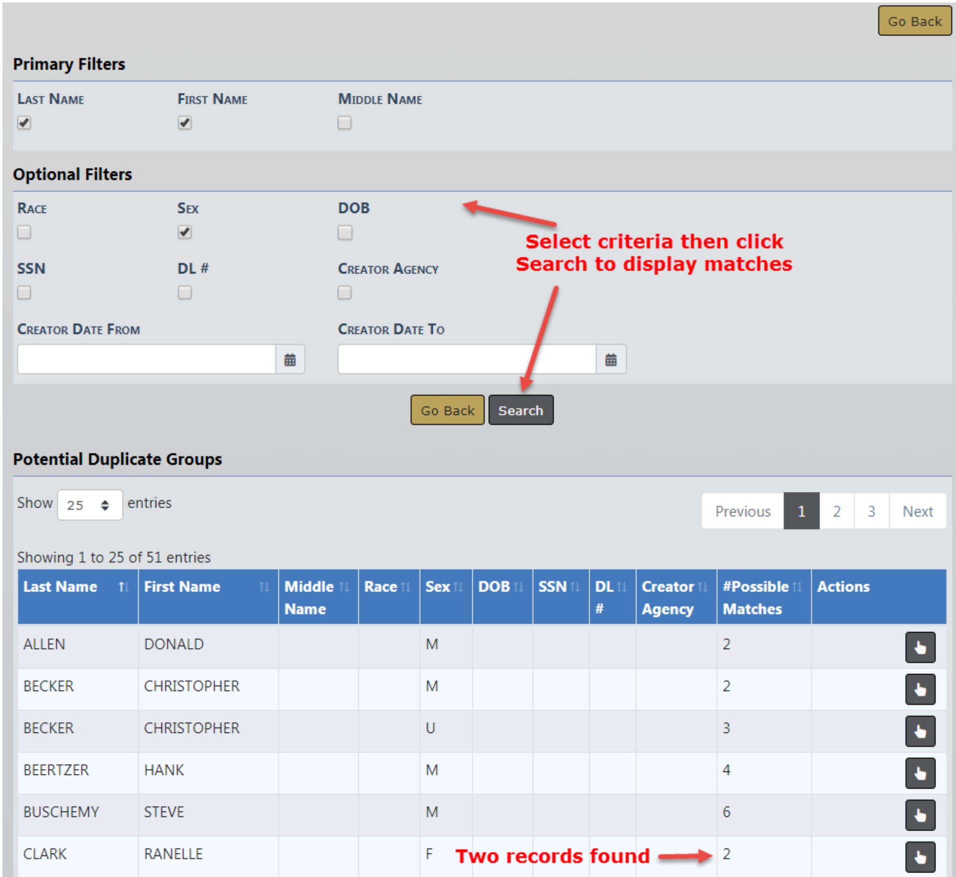
<u>Specify Person Details to Search for Potential Duplicates</u>

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.



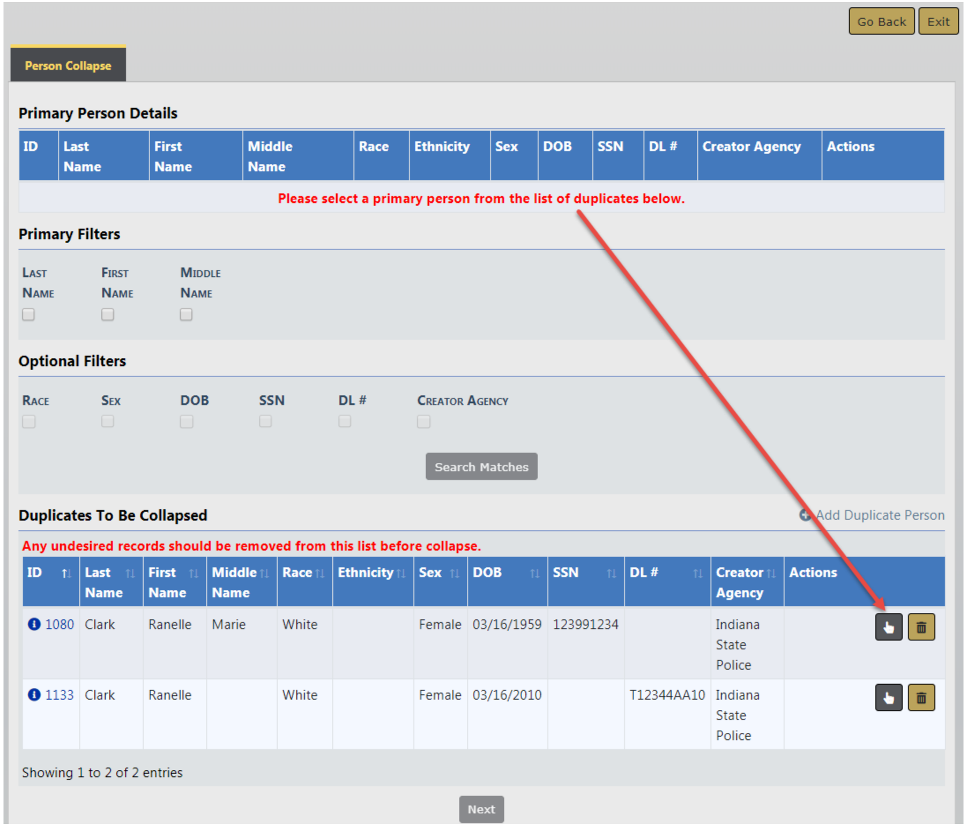
b. Select the **Filters** that apply to your search, then click **Search** to display a list of *Potential Duplicate Groups*.

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.



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.

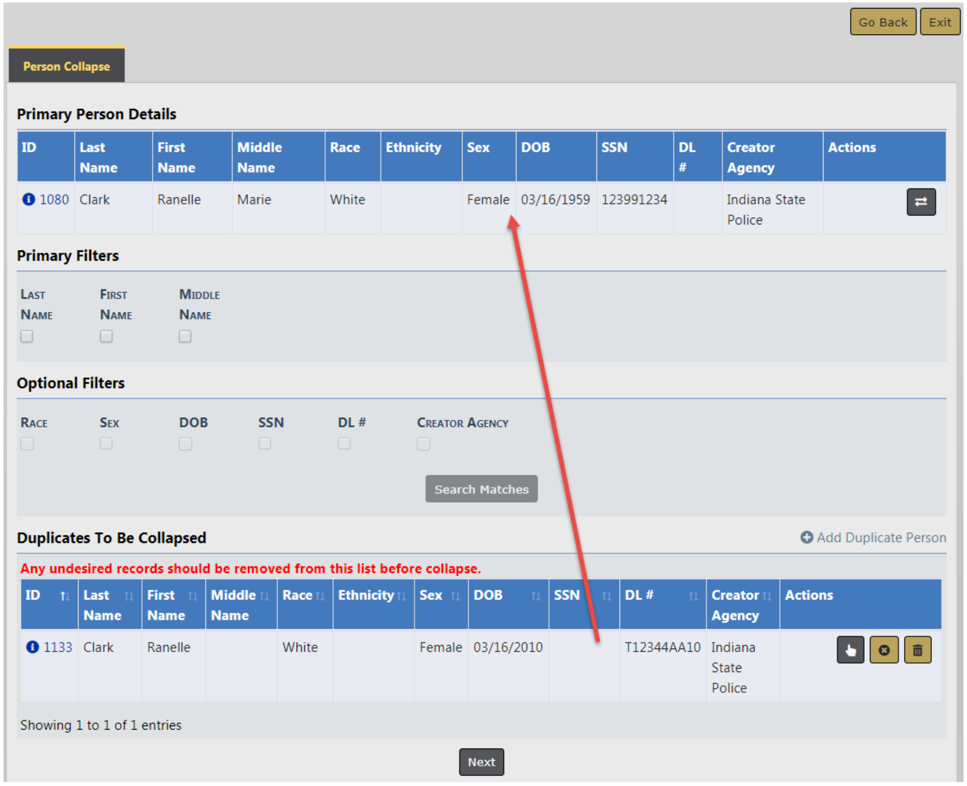


e. Optionally click the **Add Duplicate Person** link to search for and add another Master Person to the *Duplicates To Be Collapsed* list

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.



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.

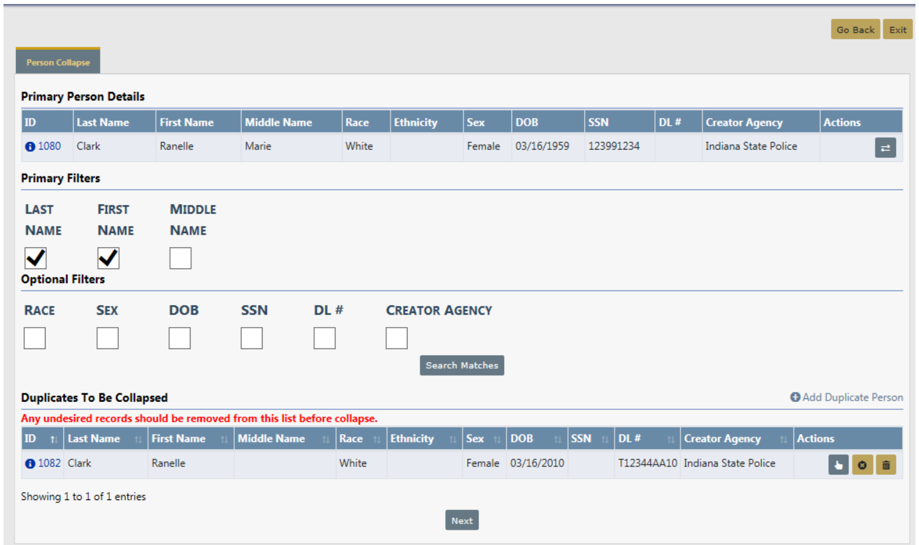
3. Click **Next** to run the collapse process. For more information about running the collapse process refer to "Run Collapse Process" below for instructions on collapsing Primary and Duplicate Master Index Records into one Master Record.

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.)



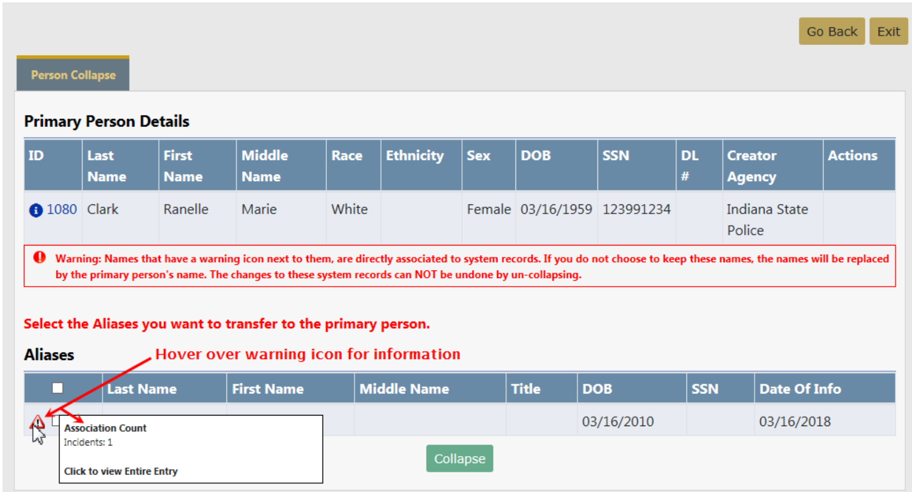
Note: You must select one Primary Person and at least one Duplicate to run the collapse process.

2. Double check the *Duplicates To Be Collapsed* list to ensure the only records that appear are those you want to collapse with the *Primary Person* record; remove any that should not be included.

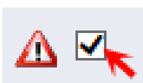
3. Click **Next**

4. A warning message appears when the duplicate record is associated with other records in the system such as, incidents, arrests, etc. Hover the mouse over the **red triangle** for a summary of the associations.

   In the example below, the duplicate person is associated with one incident.



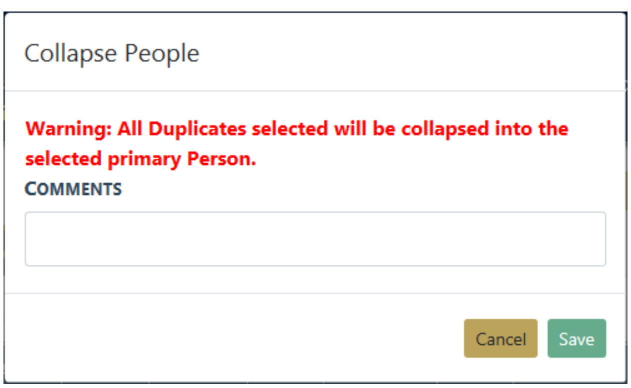
5. **Select** the box to the left of the person you want to transfer to the primary person.



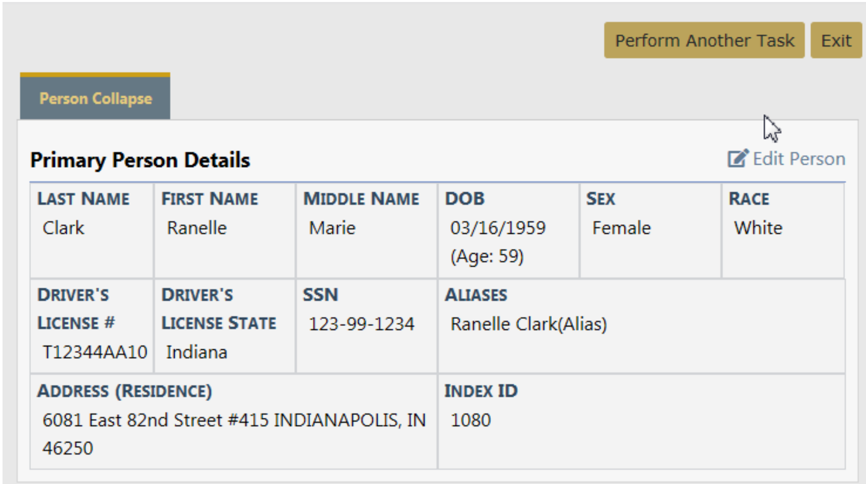
6. Click the **Collapse** button to continue with the collapse process, click **Exit** to abort without collapsing, or click **Go Back** to return to the *Person Collapse* screen.

   By choosing **Collapse**, the name on the associated records becomes the primary person name.

7. A warning and comment box appears. Enter a **Comment** and click **Save** to continue the collapse process, or click **Cancel** to abort without collapsing.



8. The *Person Collapse* screen appears when the Collapse process is complete.



Click **Perform Another Task** to Collapse other records, click the **Edit Person** link to edit the person details, or click **Exit**.

9. Data is collected and logged during the collapse process for auditing and tracking purposes. The *Collapse Log* also provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

   For more information about the *Collapse Log* or the *UnCollapse* process, refer to "Collapse Log" below.

Collapse Log

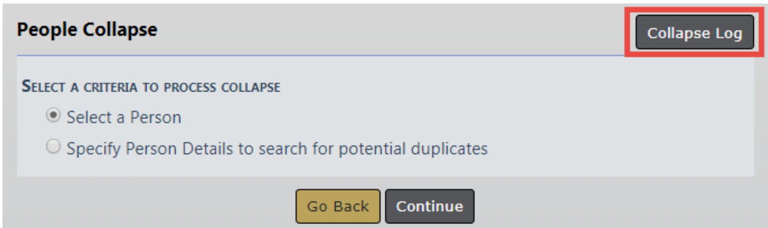
Basic Master Index data is collected and logged during the collapse process for auditing and tracking purposes. The *Collapse Log* also provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

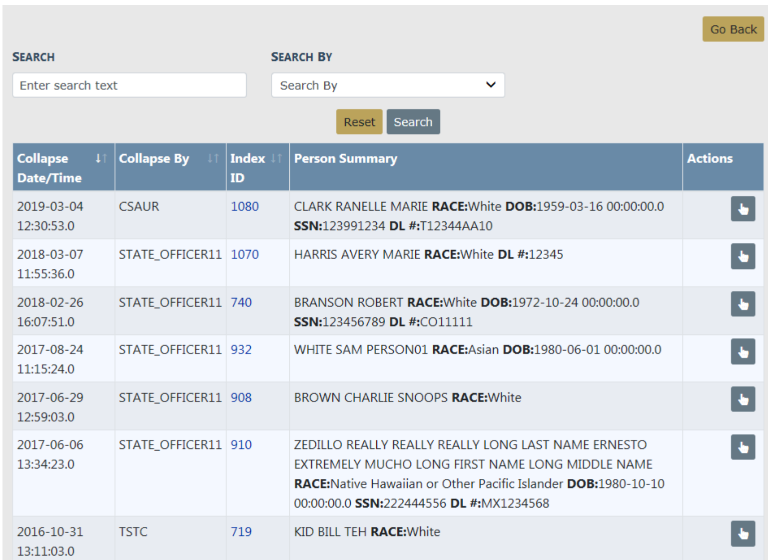
The Collapse Date, Collapsed By, Master Index Name and other information depending on the Master Index are tracked in the *Collapse Log*. For example, for the Master Person Index, Race, Sex, DOB, SSN, and Driver's License Number of both the Primary and Duplicate Person records are logged.

Use the following procedure to access the *Collapse Log*. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization.

1. Access the **Collapse** process through the *Records Management* menu, then select *Person Records* for Master Person. For more information on accessing the **Collapse** process refer to "Access Collapse Process" on page 297.

2. Click the **Collapse Log** button to open the *Person Collapse Log*.

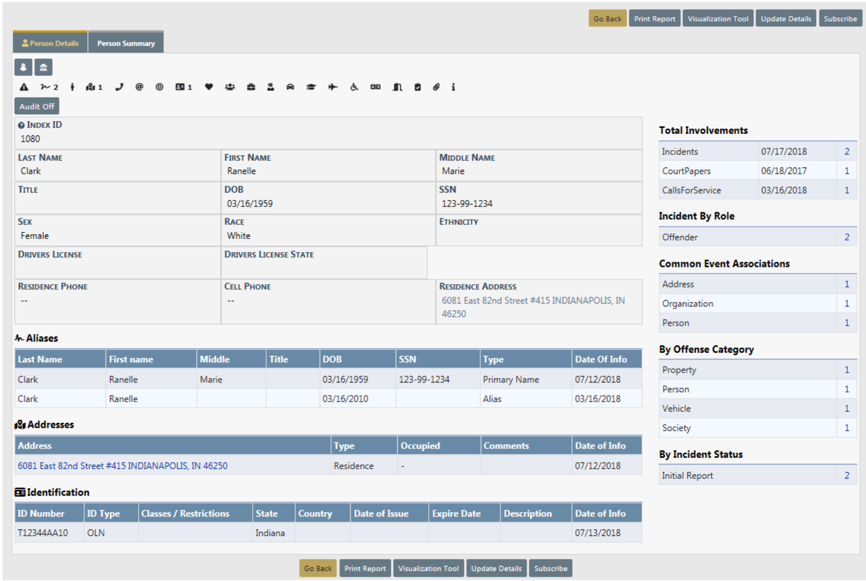




Collapse Date/Time	Collapse By	Index ID	Person Summary	Actions
2019-03-04 12:30:53.0	CSAUR	1080	CLARK RANELLE MARIE **RACE:**White **DOB:**1959-03-16 00:00:00.0 **SSN:**123991234 **DL #:**T12344AA10	
2018-03-07 11:55:36.0	STATE_OFFICER11	1070	HARRIS AVERY MARIE **RACE:**White **DL #:**12345	
2018-02-26 16:07:51.0	STATE_OFFICER11	740	BRANSON ROBERT **RACE:**White **DOB:**1972-10-24 00:00:00.0 **SSN:**123456789 **DL #:**CO11111	
2017-08-24 11:15:24.0	STATE_OFFICER11	932	WHITE SAM PERSON01 **RACE:**Asian **DOB:**1980-06-01 00:00:00.0	
2017-06-29 12:59:03.0	STATE_OFFICER11	908	BROWN CHARLIE SNOOPS **RACE:**White	
2017-06-06 13:34:23.0	STATE_OFFICER11	910	ZEDILLO REALLY REALLY REALLY LONG LAST NAME ERNESTO EXTREMELY MUCHO LONG FIRST NAME LONG MIDDLE NAME **RACE:**Native Hawaiian or Other Pacific Islander **DOB:**1980-10-10 00:00:00.0 **SSN:**222444556 **DL #:**MX1234568	
2016-10-31 13:11:03.0	TSTC	719	KID BILL TEH **RACE:**White	

3. Optionally click the **Index ID** link to open the *View Person* screen.

Collapse Date/Time	Collapse By	Index ID	Person Summary	Actions
2019-03-04 12:30:53.0	CSAUR	1080	CLARK RANELLE MARIE **RACE:**White **DOB:**1959-03-16 00:00:00.0 **SSN:**123991234 **DL #:**T12344AA10	

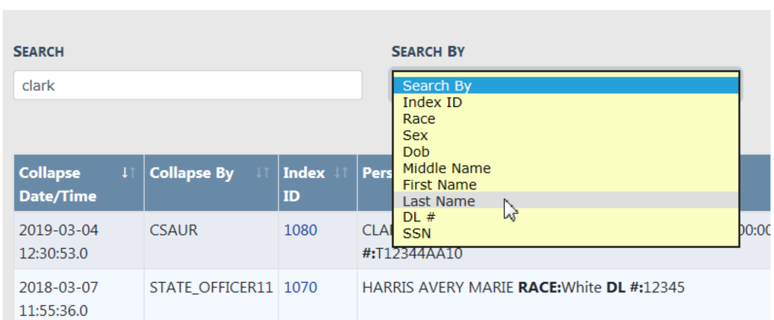


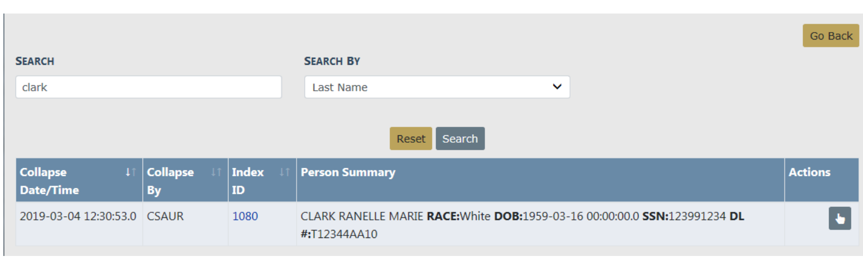
For instructions on using the *View Person* screen refer to the *Caliber Online RMS User Guide*.

Click the **Go Back** button to return to the *Person Collapse Log*.

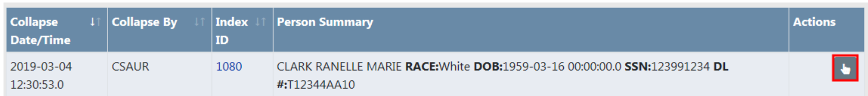
4. Optionally search for specific records.

Enter your search criteria in the **Search** text box and select the type of data you want to **Search By**, then click the **Search** button.





5. 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 **RACE:**White **DOB:**1959-03-16 00:00:00.0 **SSN:**123991234 **DL #:**T12344AA10	

Go Back

Primary Person Details

Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
Clark	Ranelle	Marie	W	F	03/16/1959	123-99-1234	

Collapsed Records

	Index ID	Last Name	First Name	Middle Name	Race	Sex	Date Of Birth	SSN	DL #
☐	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.

6. Click **Go Back** to return to the *Person Collapse Log*.

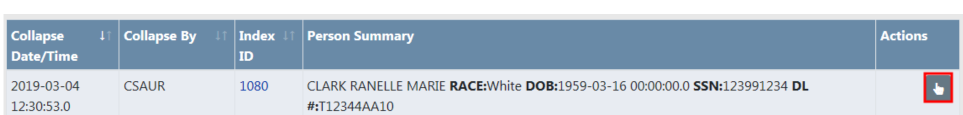
UnCollapse Master Index

The *Collapse Log* provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

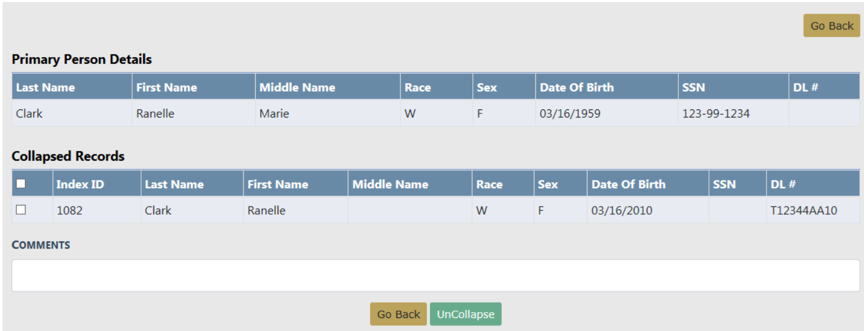
Use the following procedure to uncollapse a Master Index record. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization.

1. Access the **Collapse Log** through the *Records Management* menu, then select *Person Records* for Master Person. For more information on accessing the **Collapse Log** refer to "Collapse Log" on page 309.

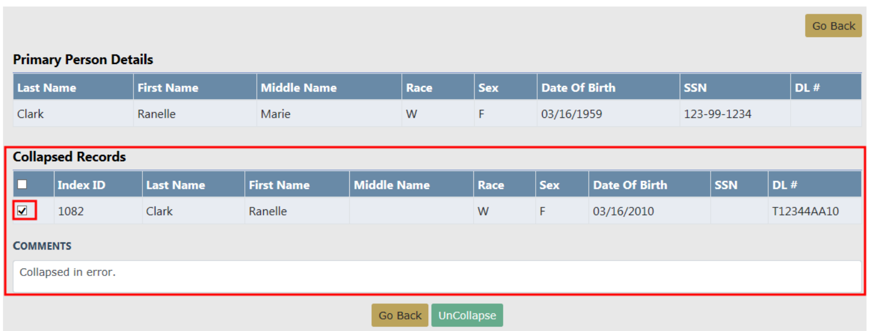
2. Identify the collapsed record you want to uncollapse, then click on the **View** icon in the *Actions* column to open the *Person Collapse* screen.



Collapse Date/Time	Collapse By	Index ID	Person Summary	Actions
2019-03-04 12:30:53.0	CSAUR	1080	CLARK RANELLE MARIE **RACE:**White **DOB:**1959-03-16 00:00:00.0 **SSN:**123991234 **DL #:**T12344AA10	



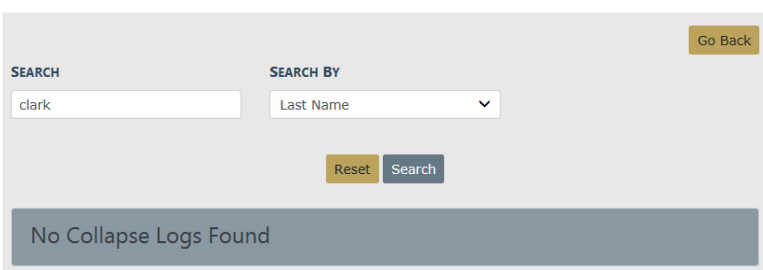
3. Select the **Collapsed Records** you want to uncollapse from the Primary Person and enter any **Comments**.



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.

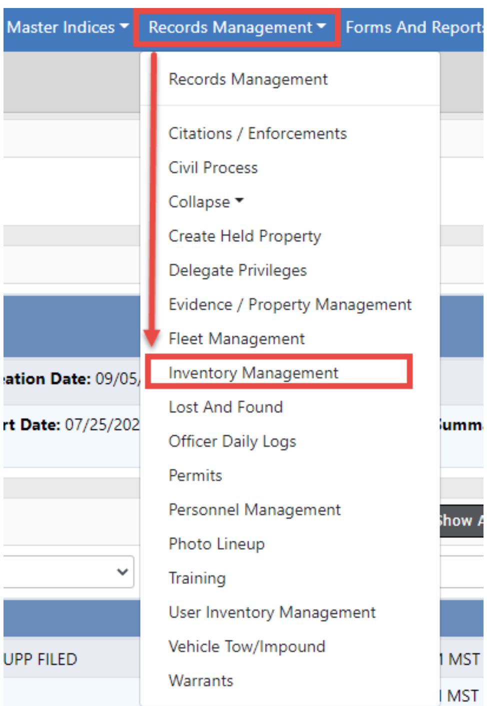


Chapter 18. Inventory Administration

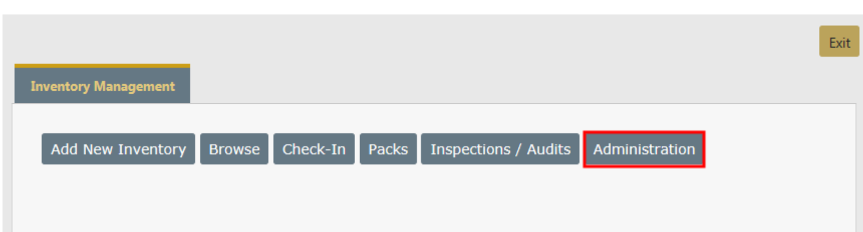
Inventory Administration allows users with proper permissions to configure and maintain settings for office supplies, fixed assets, weapons, equipment, vendor list, locations with assigned managers, clothing, and others.

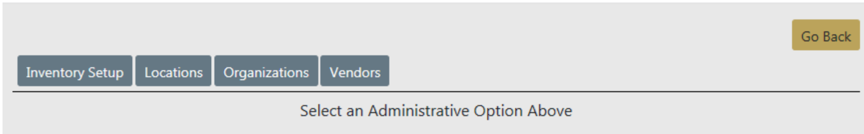
Access Inventory Administration

Click on the **Records Management** label then click on **User Inventory Management**.



Click the **Administration** button to open the **Inventory Administration** page containing up to four tabs depending on your agency setup.

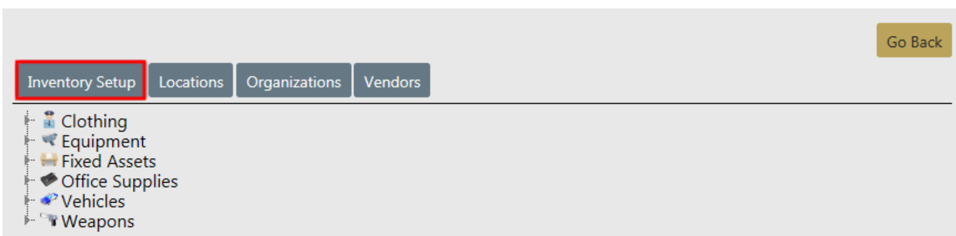




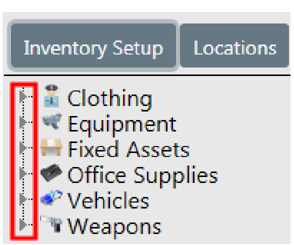
- Inventory Setup
- Locations
- Organizations
- Vendors

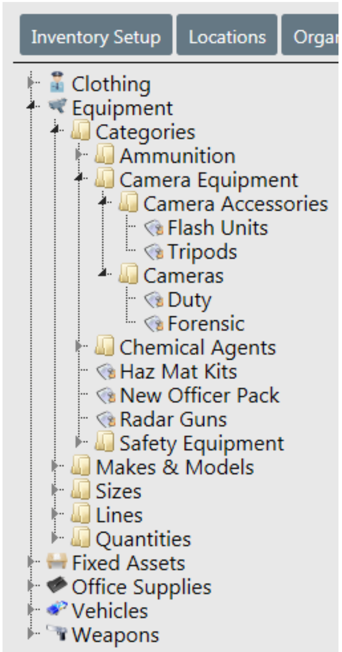
Inventory Setup

The *Inventory Setup* tab of the **Inventory Administration** page contains configuration settings of clothing, equipment, fixed assets, office supplies, vehicles, and weapons.



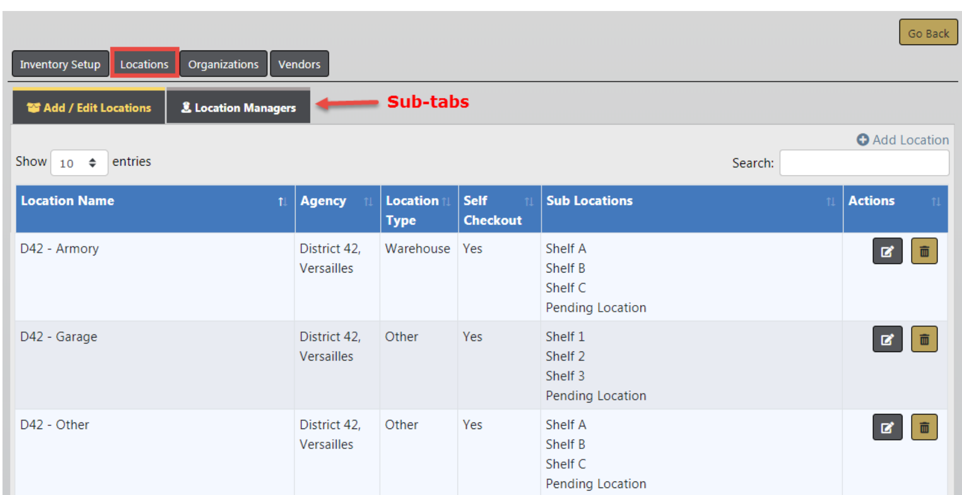
To the left of each category is a sideways **funnel**. Click on the **funnel** to drill-down for sub-categories, and sub-categories may also have funnels. You can keep drilling-down until no more funnels appear.





Locations

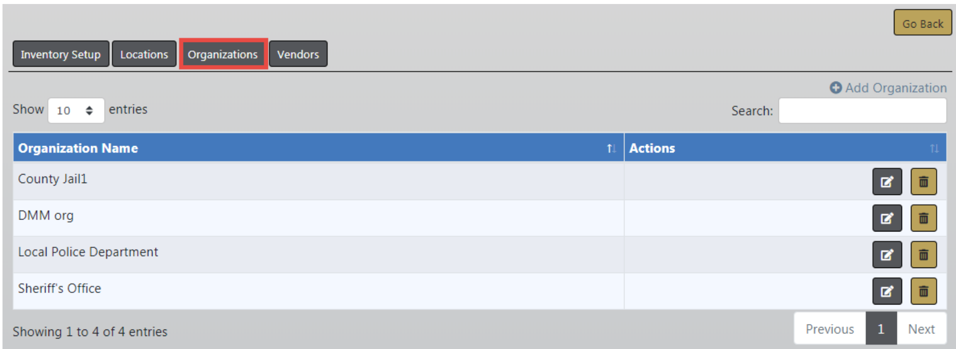
The *Locations* tab of the **Inventory Administration** page contains configuration settings for various types of locations such as a warehouse, closets, rooms, parking lots, and managers assigned to the locations.



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.

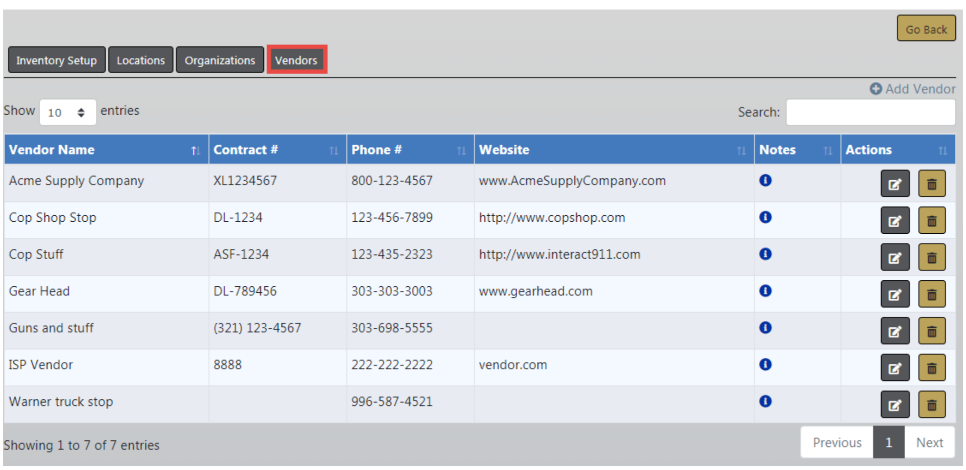
Organizations

The *Organizations* tab of the **Inventory Administration** page contains organization configuration settings, particularly useful for multi-agency users.

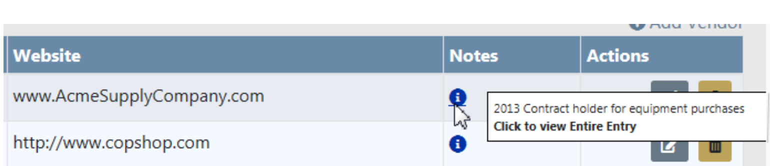


Vendors

The *Vendors* tab of the **Inventory Administration** page contains vendor configuration settings.



Hover your mouse over the blue information bubble to view a portion of a note entry that is associated with the vendor record, or click the blue information bubble to view the entire note entry.



Chapter 19. Reports

Online RMS reports consist of five report types: Ad Hoc, Custom Field, Custom Form, and Standard Menu.

- Ad-Hoc reports are created via Jasper Reports or iReports. Once a user with the appropriate permissions has created and saved ad hoc reports, other users within the agency/schema who have been the appropriate roles/permissions, can then use them.

  Note: iReport allows for a detailed and specific set of design options. A user who wants to alter the form beyond the capabilities of the Custom Form Designer would do so in iReport. They can download the template, make the changes in iReport, then re-upload it here. This will require the user to know how to use iReport.

- Custom field reports are built from user-defined fields that have custom labels.
- Custom forms reports are based on an agency's needs and are designed to gather specific information to meet those needs.
- Standard menu reports are those that are delivered with the system. They are basic, out-of-the-box reports for statistics and such.

For information on how basic users access and use the various RMS reports, refer to the *Caliber Online RMS*.

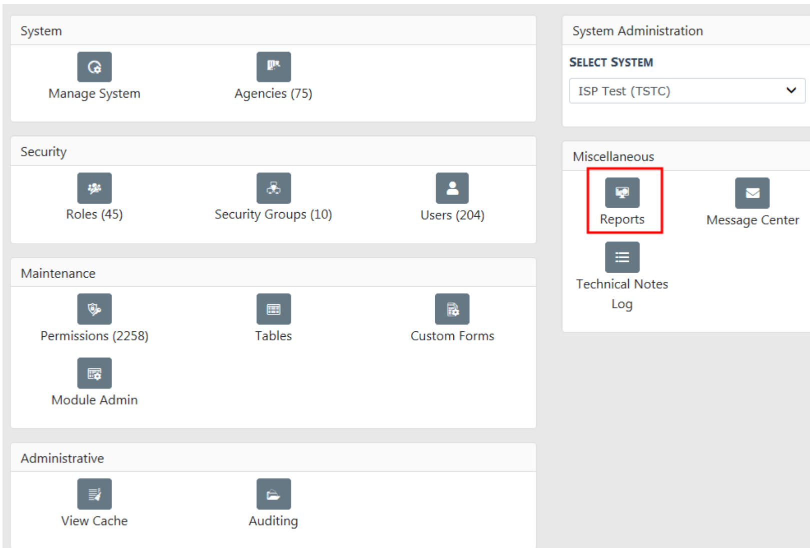
Report Administration

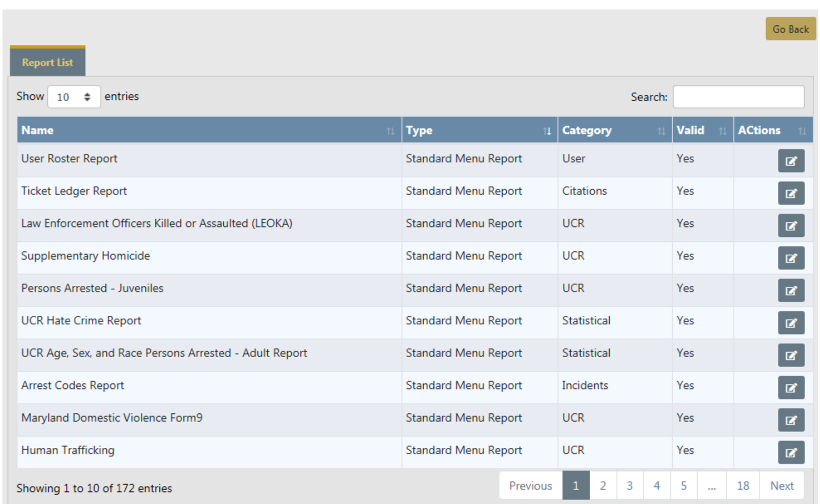
The *Report Administration* page provides administrators ways to manage the various reports.

Note: For information on how basic users access and use the various RMS reports, refer to the *Caliber Online RMS User Guide*. The **Forms And Reports** menu provides access to existing reports.

You can access, add, and update reports from the *Report Administration* page.

From the *Home* page, click the **Administration** menu label to open the *Administration Home* page, then click on the **Reports** icon to display the *Report Administration* page. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.





Name	Type	Category	Valid	ACtions
User Roster Report	Standard Menu Report	User	Yes	
Ticket Ledger Report	Standard Menu Report	Citations	Yes	
Law Enforcement Officers Killed or Assaulted (LEOKA)	Standard Menu Report	UCR	Yes	
Supplementary Homicide	Standard Menu Report	UCR	Yes	
Persons Arrested - Juveniles	Standard Menu Report	UCR	Yes	
UCR Hate Crime Report	Standard Menu Report	Statistical	Yes	
UCR Age, Sex, and Race Persons Arrested - Adult Report	Standard Menu Report	Statistical	Yes	
Arrest Codes Report	Standard Menu Report	Incidents	Yes	
Maryland Domestic Violence Form9	Standard Menu Report	UCR	Yes	
Human Trafficking	Standard Menu Report	UCR	Yes	

This page displays both custom created reports and product reports.

To edit a product report, click the edit icon  to display an *Edit Report* page. Here, you can change the report name, category, description, agencies if applicable, and roles. In addition, Operations can control who has access to which reports.

Ad Hoc Reports

As the name implies, an ad hoc report is one created for a specific purpose. Online RMS agencies can create reports that perform specific functions within their agencies. To create ad hoc reports, a user (sometimes referred to as a *superuser*) must have the appropriate permissions and have access to the Jasper Server.

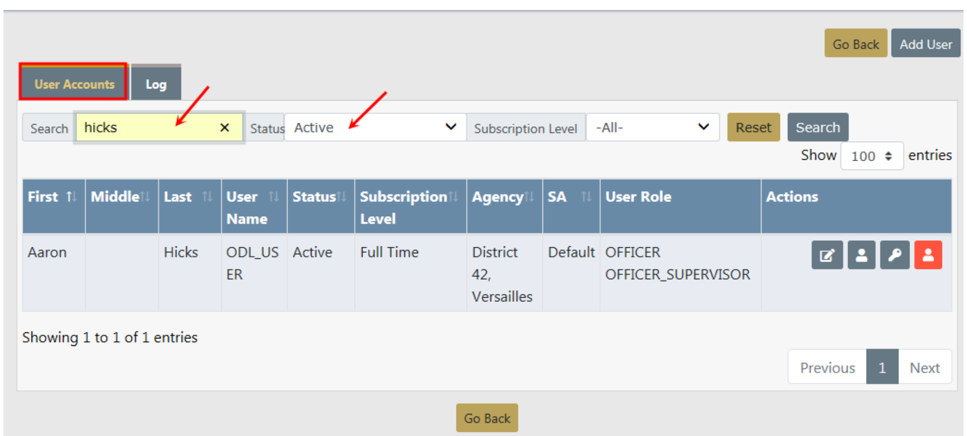
Ad Hoc Tool Access

For a user to access the Open Ad Hoc Tool, an agency administrator must set up that user with the appropriate access permissions.

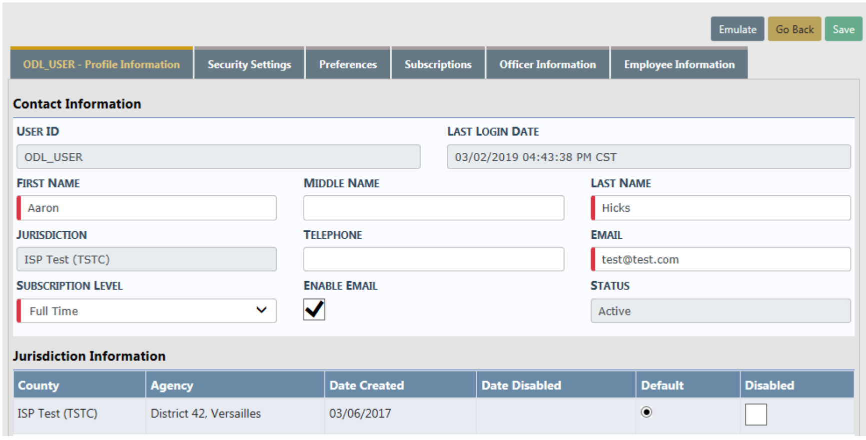
Use the following procedure to set up ad hoc tool access.

1. From the *Home* page, open the **Administration** menu then click on **Users** to open the *Manage Users* page. The page opens to the *User Accounts* tab by default. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.

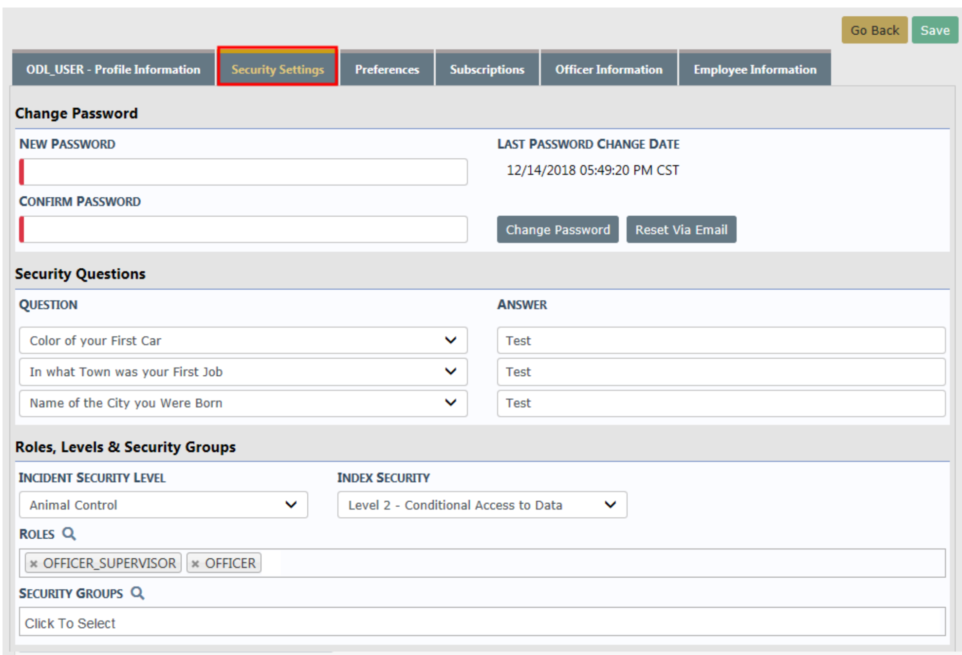
2. Use the **Search** fields to locate the user by typing a search parameter in the **Search** field, in the Status field select *Active*, then click the **Search** button to display a list of users that match your criteria.



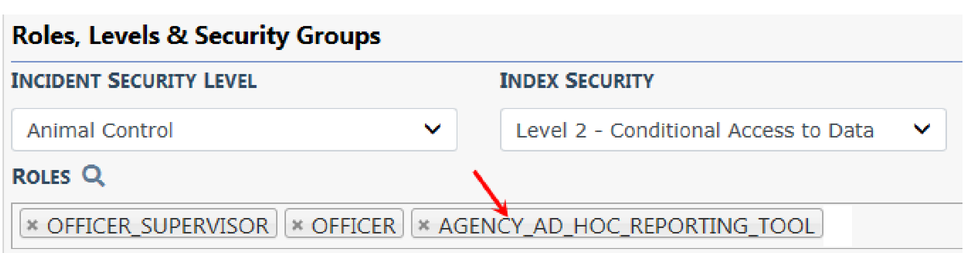
3. Click  in the **Actions** column in the same row as the user's name to open the user's profile page as shown.



4. Click the **Security Settings** tab.



5. Click into the **Roles** field and select *AGENCY_AD_HOC_REPORTING_TOOL* from the list.



6. Click **Save** to save the change.

Ad-Hoc Reporting

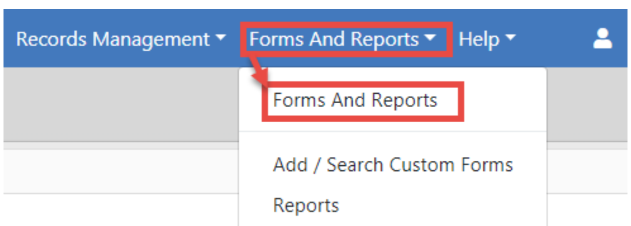
With appropriate permissions you can create Ad-Hoc reports and, using the Repository, you can group them into custom categories or topics.

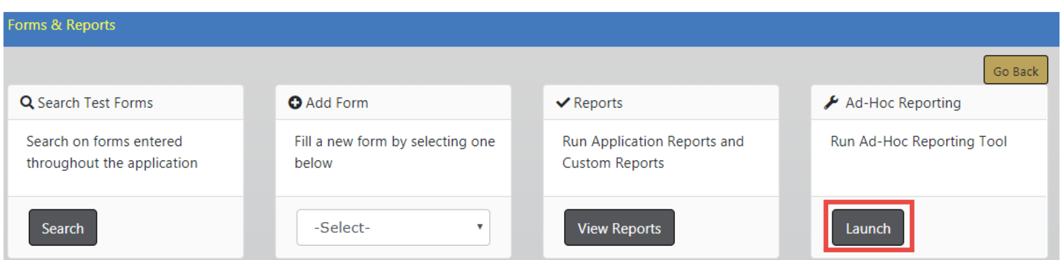
Create an Ad-Hoc Report

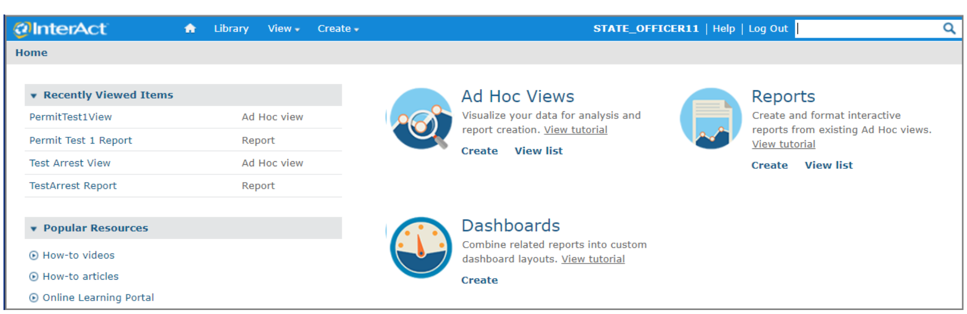
The following example steps you through the process to create an Ad-Hoc report and group by reporting areas.

Use the following procedure to select an ad-hoc topic that contains the **Reporting Area** field.

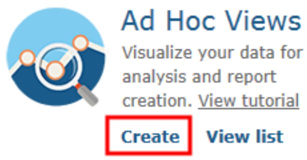
1. From the *Forms and Reports* page, click the **Launch** button under the Ad-Hoc Reporting section.

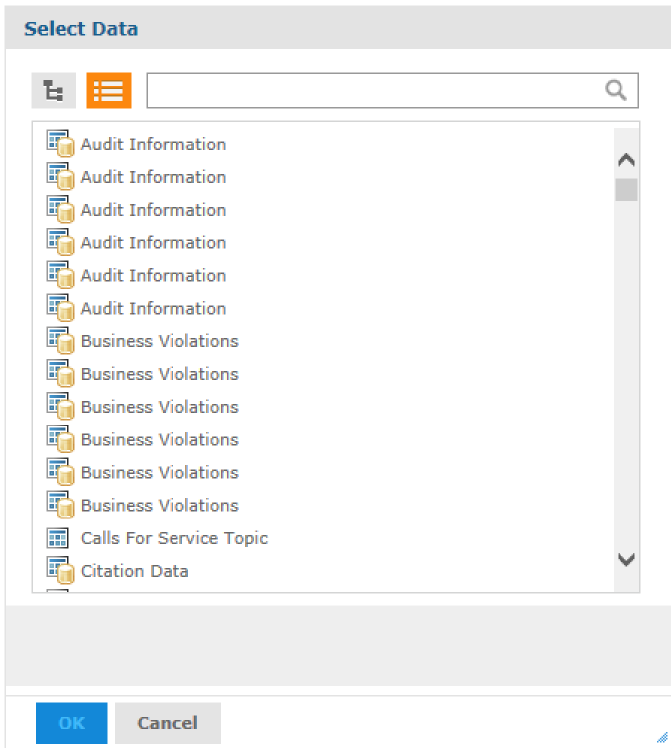




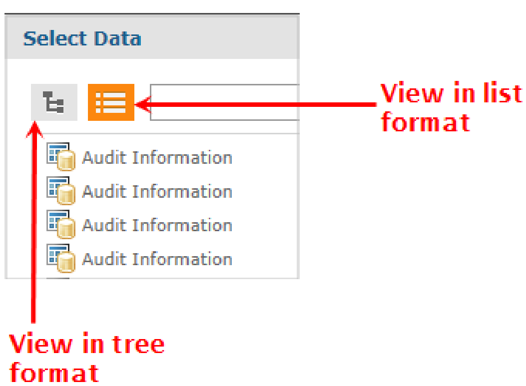


2. Click **Create** under Ad Hoc Views to open the *Select Data* window.





Click on the appropriate icon to view the source in *Tree* format or in *List* format, respectively. The *List* format is selected by default.



3. To choose using the *Tree* format:

   a. Click **+** to the left of the **Public** folder to open the folder.

   b. Click **+** to the left of **Ad Hoc Components**.

c. Click **+** to the left of **Topics**.

d. Select a topic.

Note: The following topics have been modified as follows:

- Calls for Service Topic has been modified as follows:

  BEAT and SUB_BEAT is labeled Reporting Area.

  Officer Information is labeled Primary Officer.

- Evidence Topic has the additional fields: Property Summary, Location Remarks, Reporting Area, and Status description.

- Field Arrest Charges Topic has the additional fields: Person Summary, Address Summary, Impound ID, Vehicle Seized, Vehicle Stored, Currency Seized, Currency Total, Discharge Date, Status Code, Status (to reference new columns), Case Number, Reporting Area, Longitude, and Latitude.

- Field Arrest Topic has the same additional fields as the Field Arrest Charges Topic (see above).

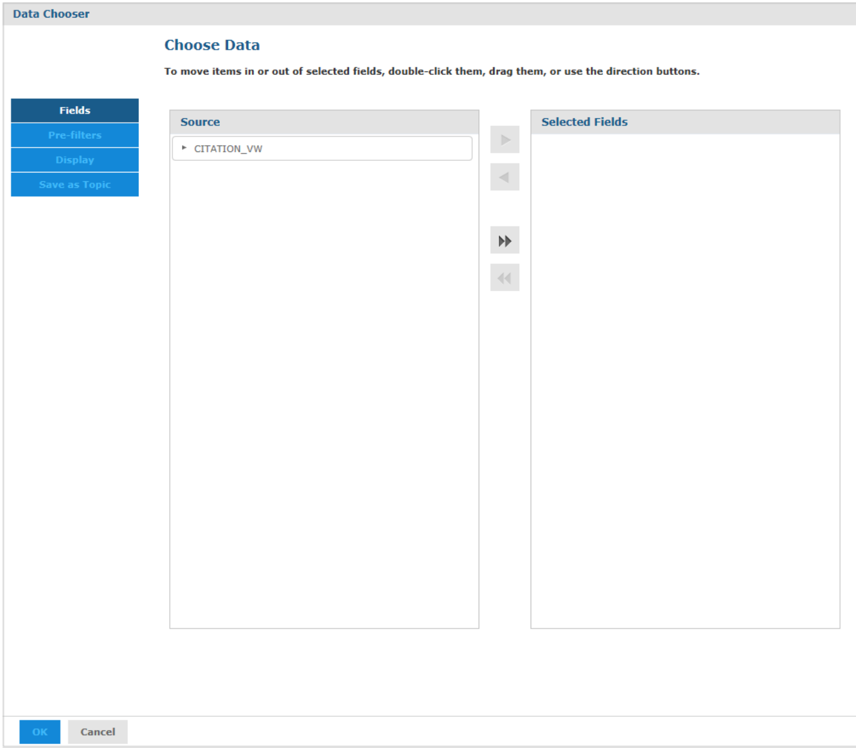
- Field Contact Topic has the additional fields: Notes, Address, Location Reporting Area and general summary information for Officer, Gang, Person, Organization and Vehicle.

- Incident Topic has the additional fields: Status (description), Address (summary), Reporting Area, Incident NIBR City, Incident County, Incident Township.

- Incident Offender Evidence Topic has the additional fields: Property Summary, Status (description), Address (summary), Location Remarks, Reporting Area, Location Agency, Incident NIBR City, Incident County, Incident Township.

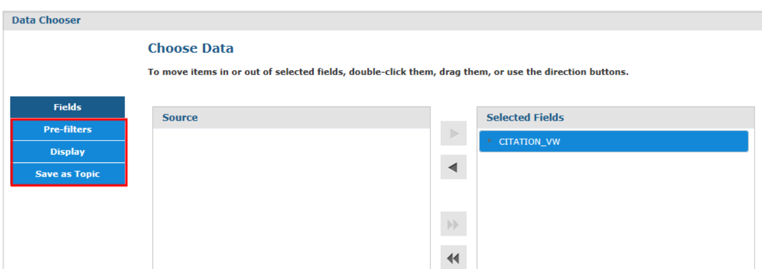
4. To choose using the *List* format:

a. Scroll down and click on the source you want, then click the **Choose Data...** button to open the *Data Chooser* page.



b. Click on items under the *Source* section then click the **right arrow** to move them into the *Selected Fields* section. Or **double-click** on selected *Source* items to move them automatically into the *Selected Fields* section.

c. The **Pre-Filters**, **Display**, and **Save as Topic** buttons on the left become active. Click through each button to define the report.

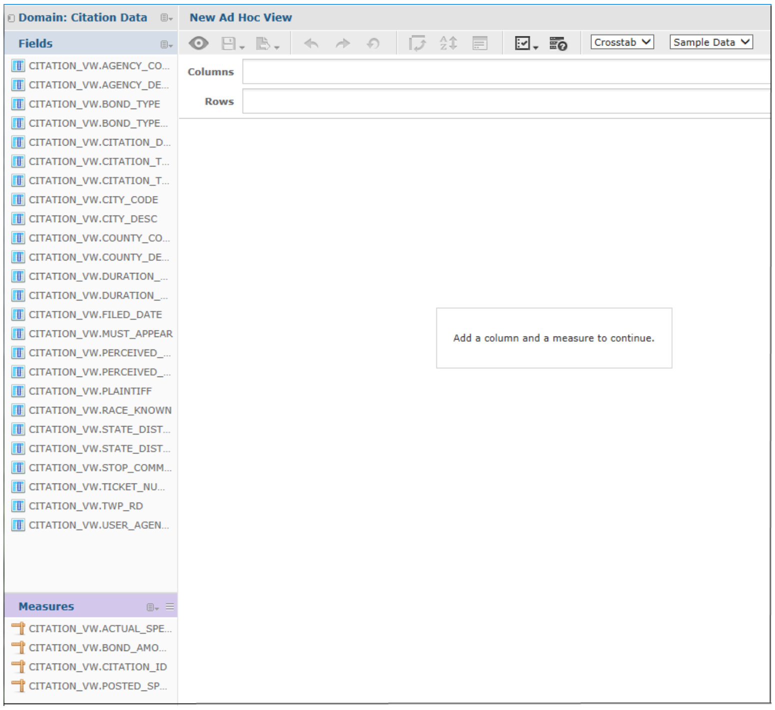


- **Pre-Filters**: Create filters to limit the data available in the editor. For example, you can limit the report to list citations with a specific citation type.

- **Display**: Change the display name for fields, re-order fields, and choose whether the fields are listed in groups or not.

- **Save as Topic**: Save the topic for later use.

5. Click **OK** to open the *New Ad Hoc View* page.

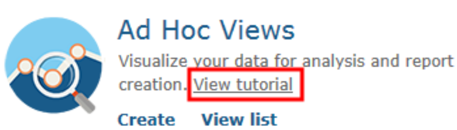


6. Click on titles on the left and drag and drop them into the Columns and Rows fields on the upper right.

7. Give your report a title in the designated text box.

8. Use the tool bar to apply other functions. Hover your mouse over each icon on the tool bar for a description of its function.

For more information on Ad Hoc Views, click on the View Tutorial link.

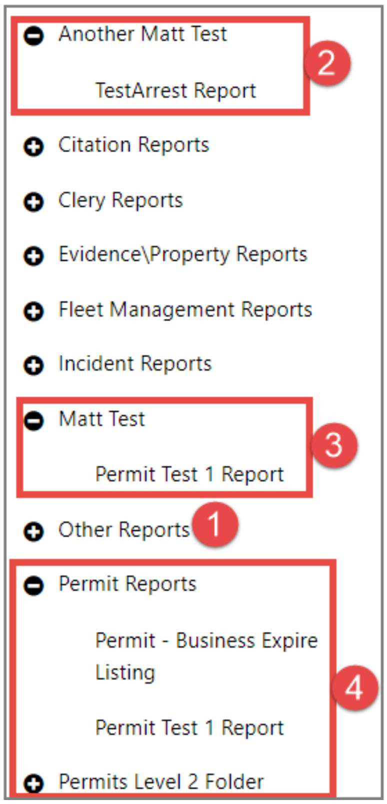


Group Ad-Hoc Reports using the Repository

With Online RMS 11.7.0 and above, you can add folders, or categories, to the report repository to better group your Ad-Hoc reports. Previously, all new Ad-Hoc reports were grouped under *Other Reports* automatically for the users who have permissions to run reports.

The example below illustrates how Ad-Hoc reports can reside in their own categories, separate from *Other Reports*.

Menu for users with permissions to run reports



Numbers 2, 3, 4 in the above example contains Ad-Hoc reports that have been categorized outside of *Other Reports* (number 1).

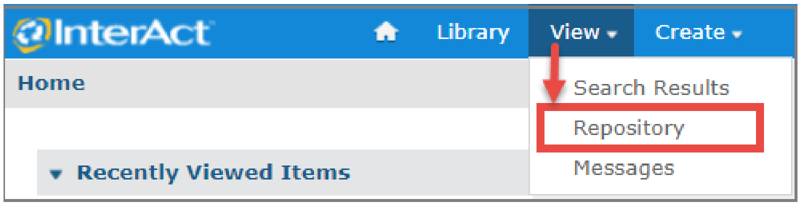
Before Online RMS 11.7.0, Ad-Hoc reports would all reside under the *Other Reports* category. To create new categories, see "To Create new categories" below.

For more information on how users run reports, refer to the *Caliber Online RMS User Guide*.

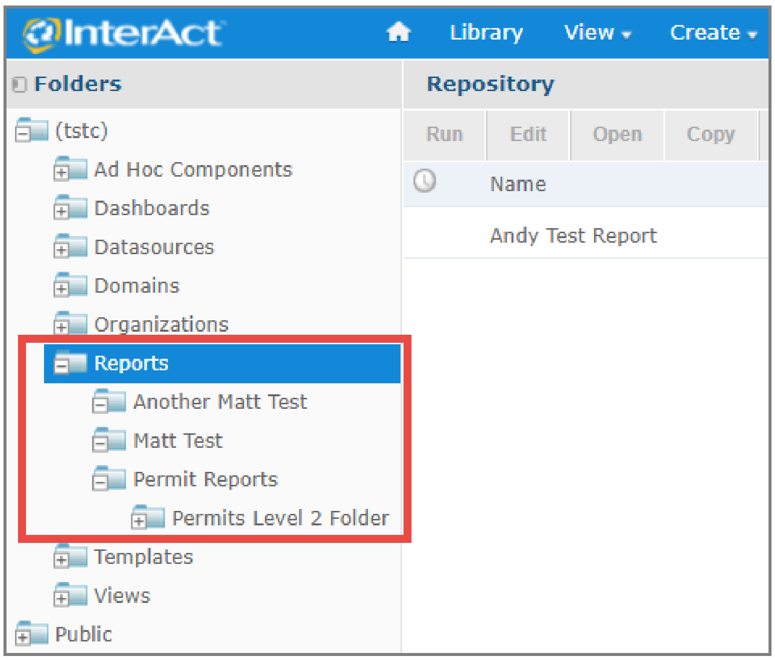
To Create new categories

1. From the *Forms and Reports* page, click the **Launch** button under the Ad-Hoc Reporting section as shown in Step 1 under "Create an Ad-Hoc Report" on page 323.

2. Click **View** on the top menu, then **Repository** to open the Repository.



3. Click **+** next to the **Reports** folder to expand subfolder categories that may exist, and repeat for any subfolders.



4. To create a new subfolder category, **right-click** on a folder then click **Add Folder**.

   a. Enter the folder **Name**.

      - If you enter a unique name that does not exist, that new folder appears as its own category to the user, rather than under *Other Reports*. Refer to numbers 2 and 3 shown under "Menu for users with permissions to run reports " on the previous page.

      - If you wish to add Ad-Hoc reports to a category that already exists, enter that exact category name when creating the subfolder. *Permit Reports* is used in the example. Name the new subfolder *Permit Reports*, then Ad-Hoc reports added to that new subfolder will display under the existing *Permit Reports* category. Refer to number 4 shown under "Menu for users with permissions to run reports " on the previous page.

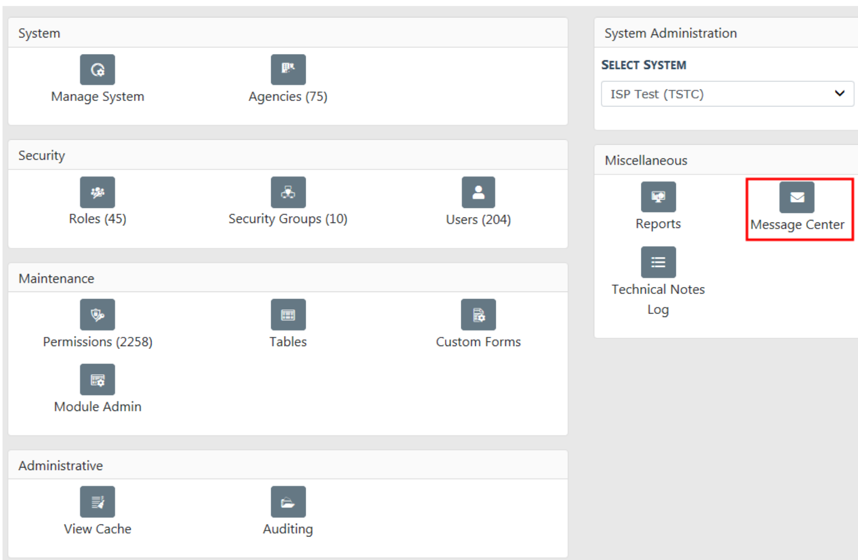
   b. Optionally enter a **Description**.

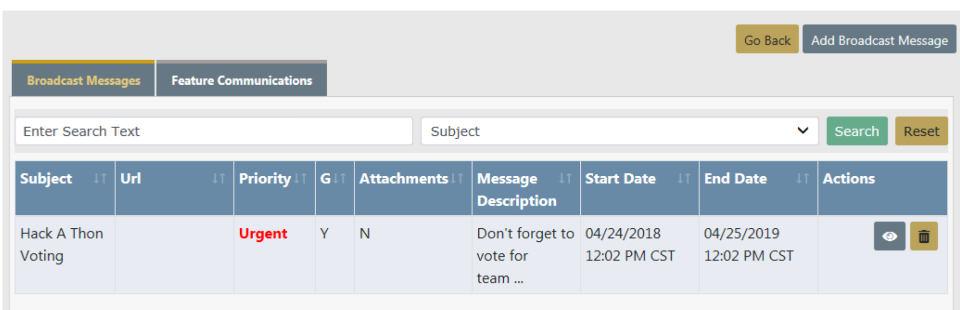
c. Click **Add**.

Note: You cannot delete folders. Submit a support ticket and Caliber staff will delete the folder for you.

Chapter 20. Message Center

This module allows administrators to setup and maintain broadcast messages for users. From the *Administration Home* page, click the **Message Center** icon to open the *Message Center* page as shown. (Alternatively, select **Broadcast Messages** from the **Administration** drop down menu on the top navigation bar.)





This page has two tabs: **Broadcast Messages** and **Feature Communication**. Depending upon roles, some users see only the **Broadcast Messages** tab; others see both.

- "Broadcast Messages" on the next page for more information and instructions on the first tab.
- "Feature Communications" on page 338 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.

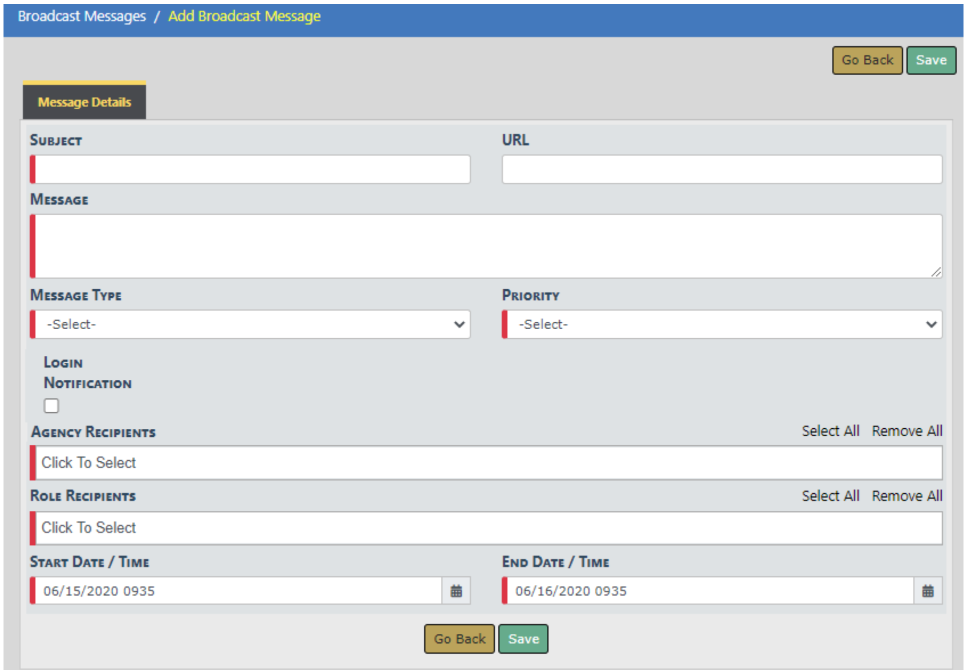
Use the **Search** fields to search for a specific message as follows:

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.



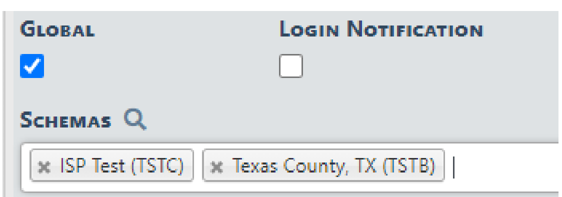
2. Enter a **Subject**.

3. Optionally enter a **URL**.

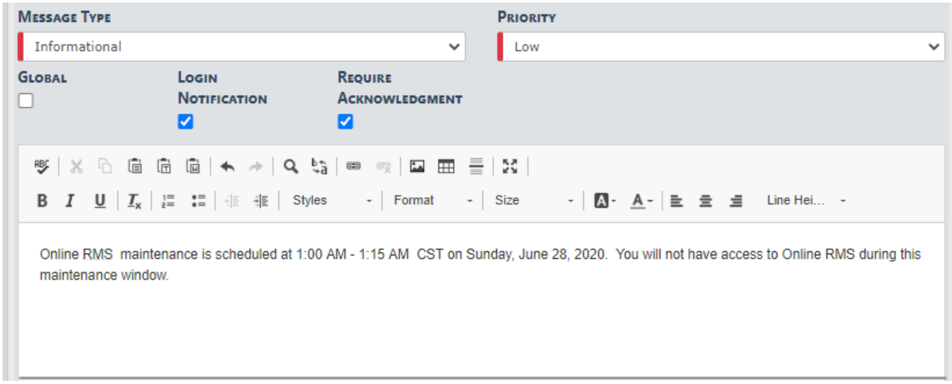
4. Select the **Global** checkbox if you want to send the notification to schemas rather than agency recipients.

   Note: This option is only available to users with *c_admin* permissions.

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



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



a. When you select the **Login Notification** checkbox, a text editor opens, where you can enter a message and format the content.

b. Select the **Require Acknowledgment** checkbox if you want to require users to acknowledge the message. If this option is checked, the message appears every time a user logs in, until the user acknowledges the message.

6. Select one or more **Agency Recipients** for your message by selecting from a list.

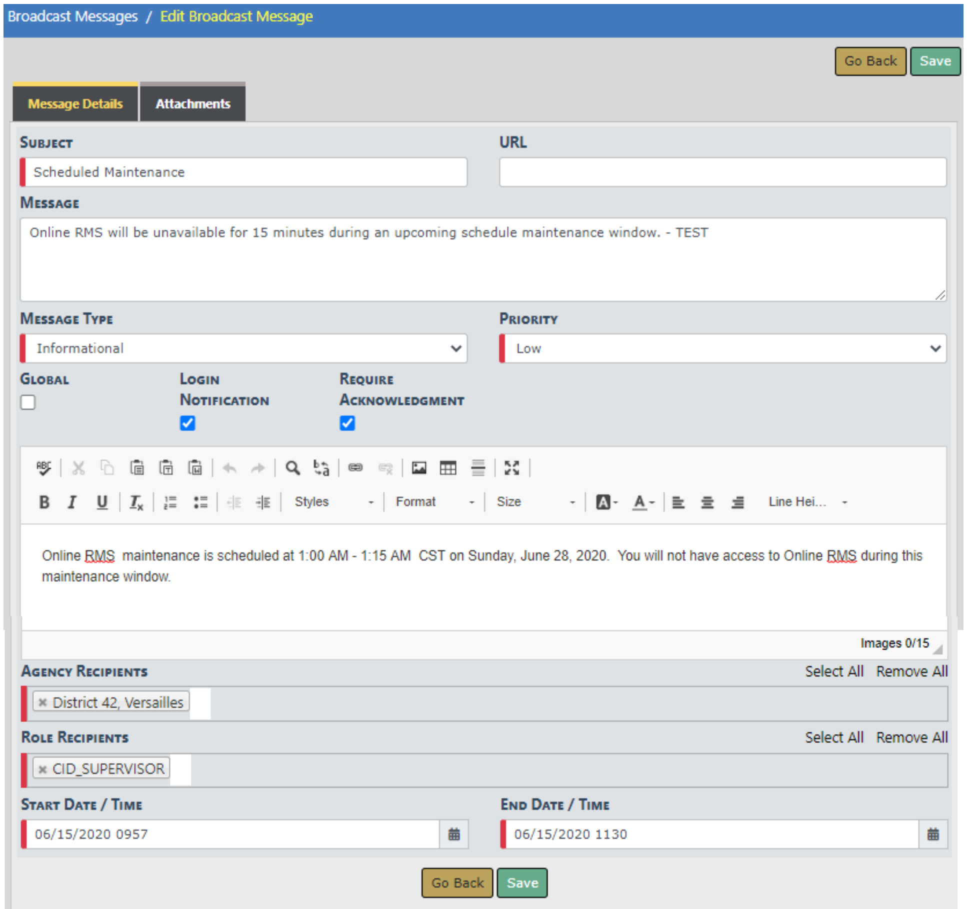
Note: If **Global** is checked, skip this step.

7. Select one or more **Role Recipients**.

8. Edit the **Start Date** and **Time** if needed (default setting is current date and time) and set an **End Date** and **Time**.

The message automatically expires on the specified end date and time, unless you delete it before that time, or you edit the message and extend the date and time.

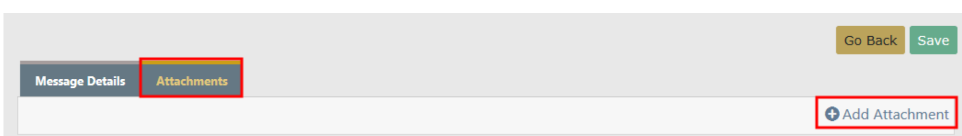
9. Click **Save** to save the message. The *Edit Message* page opens with two tabs: *Message Details* and *Attachments*.



10. Click **Save**.

11. Optionally click on the **Attachments** tab to upload an image file. Click **Add Attachment** to select a file and upload.

    Note: The **Attachments** tab displays after you click **Save** when adding a new attachment.



    For more information on uploading attachments, refer to "Attachments" on page 11.

12. Repeat Steps to broadcast another message or click **Go Back** to return to the *Message Center* page.

View Message

Use the following procedure to view a broadcast message.

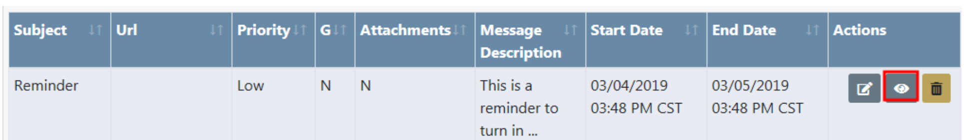
1. Access the *Message Center* page. For more information, refer to " Message Center" on page 331.

2. Use the **Search** feature to display a specific message.

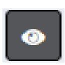
   a. Type a string of characters in the first **Search** text field.

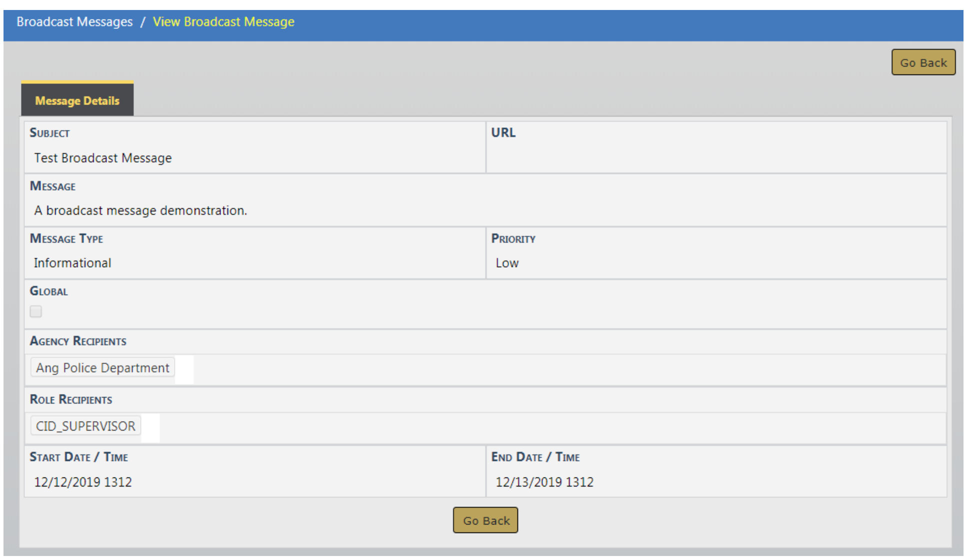
   b. Select from the drop-down list in the subject field to specify where the string can be found.

   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.

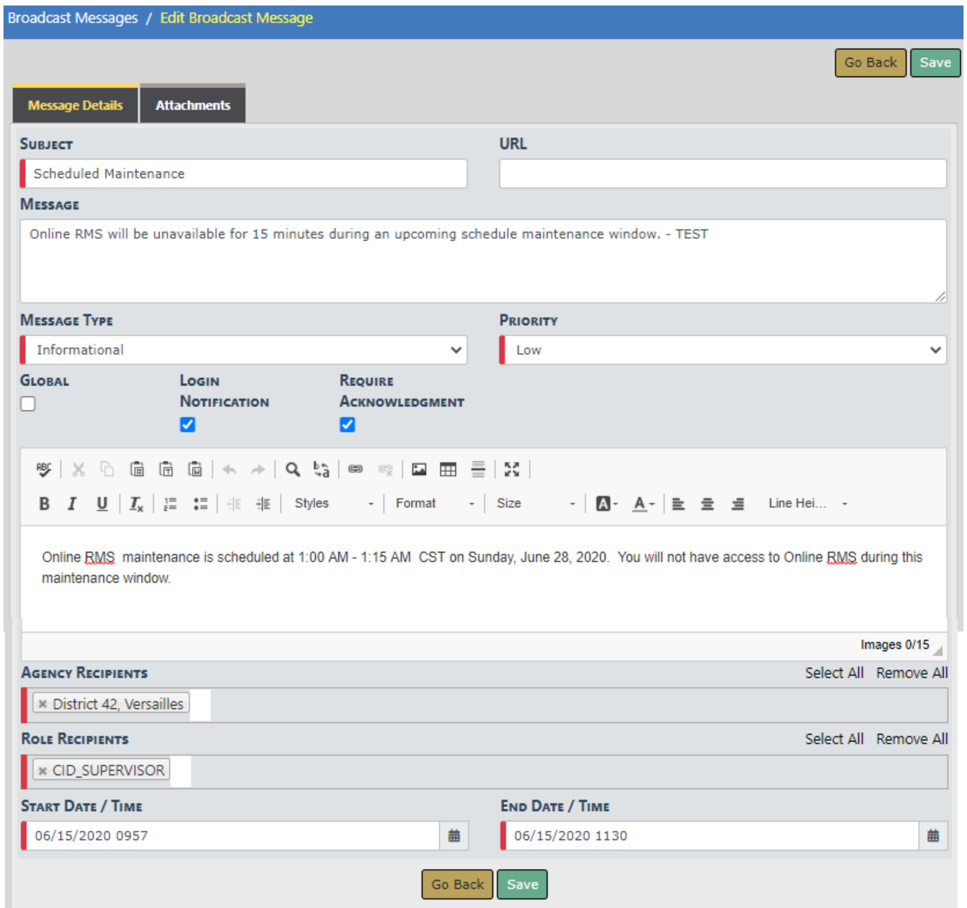


4. Click **Go Back** to return to the *Message Center* page.

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 331.



2. Make changes or upload attachments as needed. ("Add Message" on page 332 for more information.)

   Note: To cancel changes, click **Go Back** at any time to return to the *Message Center* page.

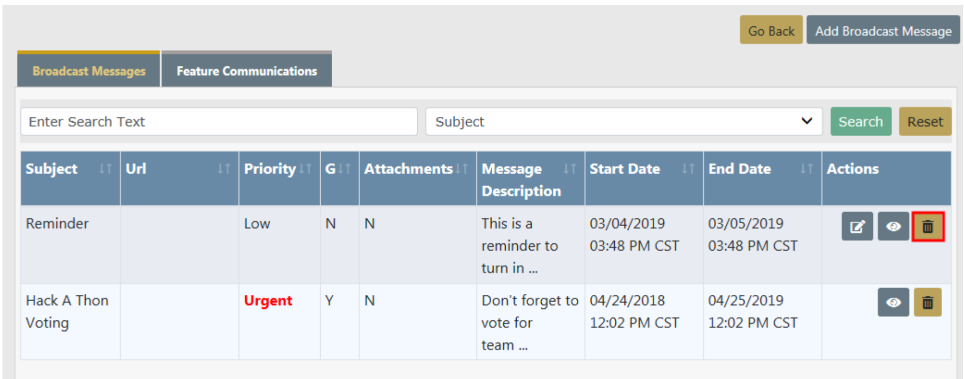
3. Click **Save** to save changes and return to the *Message Center* page.

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 331.

2. Click  to the far right in the same row to delete the message.

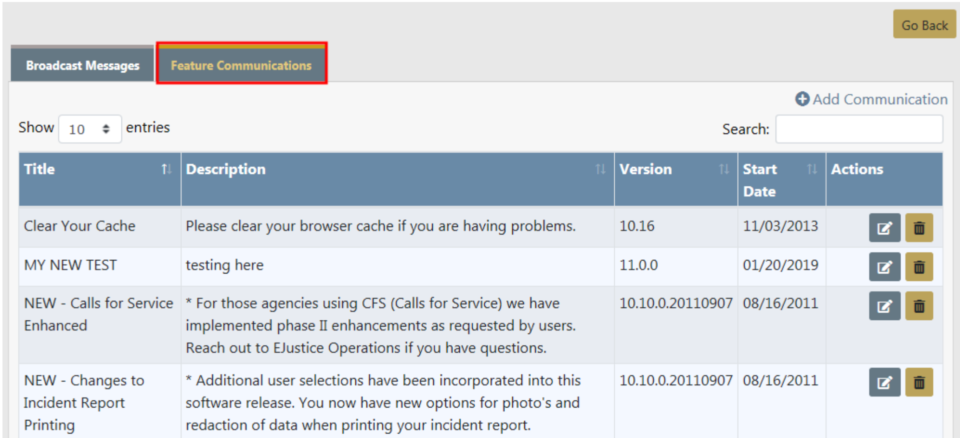


3. A *Are you sure you want to delete this message?* dialog box appears.

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 331.



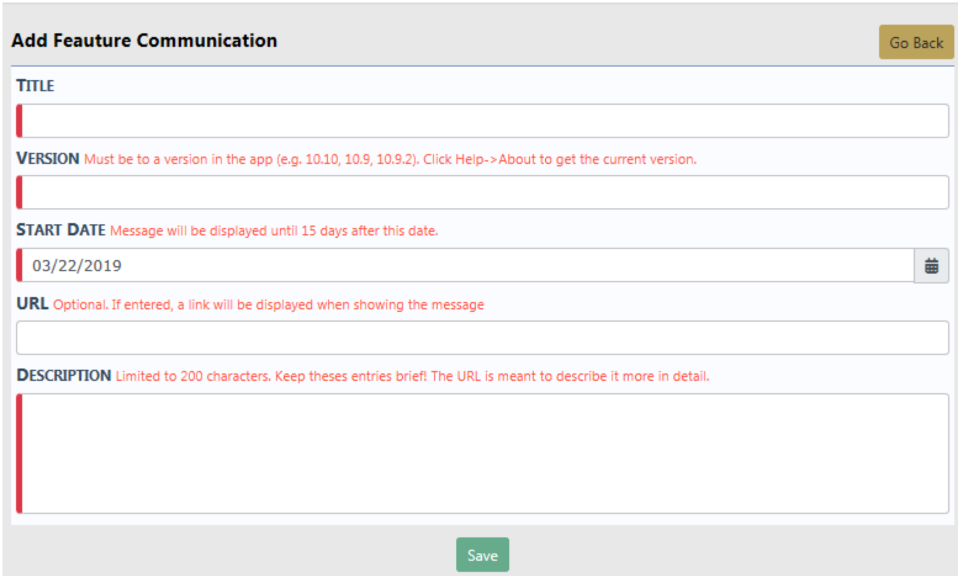
This page is used to manage communications to users about new features and changes to existing features.

- "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 331.



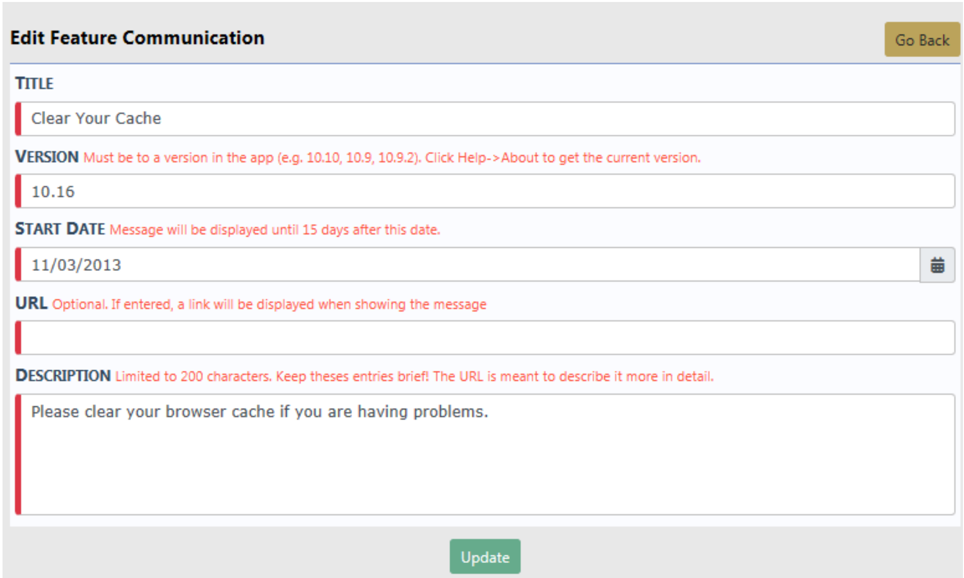
2. After reading all instructions in red text, complete each of the required fields.

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 331.



2. Make changes as need to the content of each field.

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

4. Click **Go Back** to return to the *Feature Communications* page where your changes will show in the edited listing.

Chapter 21. Maintenance Values

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

Examples:

- Determine if incidents always require approval, regardless of whether or not an offense exists.
- Allow agency to select specific charge violation related to an offense code.
- Enable level 2 approval for criminal complaints.
- Turn email notifications on or off at the application level.
- Set max file size for attachment uploads.
- Set number of days to increment case activity review date.
- CAD IP Address.
- Allow officers to select another agency within their organization when creating evidence.
- Enable fee collections of court papers.
- Require at least one narrative for a field arrest.
- Set a default warrant status when it is added to a field arrest.
- Display criminal complaints under recent activities that were submitted within a specified number of days.
- Require Off Duty and Service Interval when entering fuel/oil.
- Set max number of allowed pinned records per user, if different than the default of 50.
- Optionally require at least one evidence processing record, if applicable to your agency.
- Default chain of custody to print in ascending order.
- Require Judge on warrant creation.

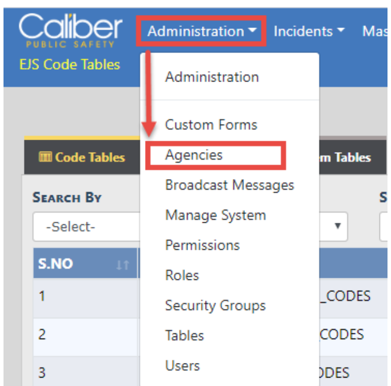
Access Maintenance Values

There are two ways to access Maintenance Values, depending on your permissions:

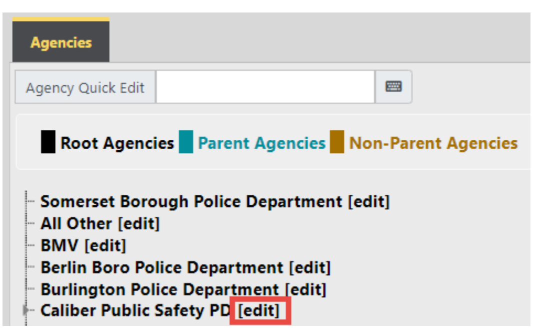
- Agency Profile - Settings Tab.
  - Settings for a specific agency.
- Administration top menu.
  - Schema-level settings (all agencies).

Agency Profile Settings Tab

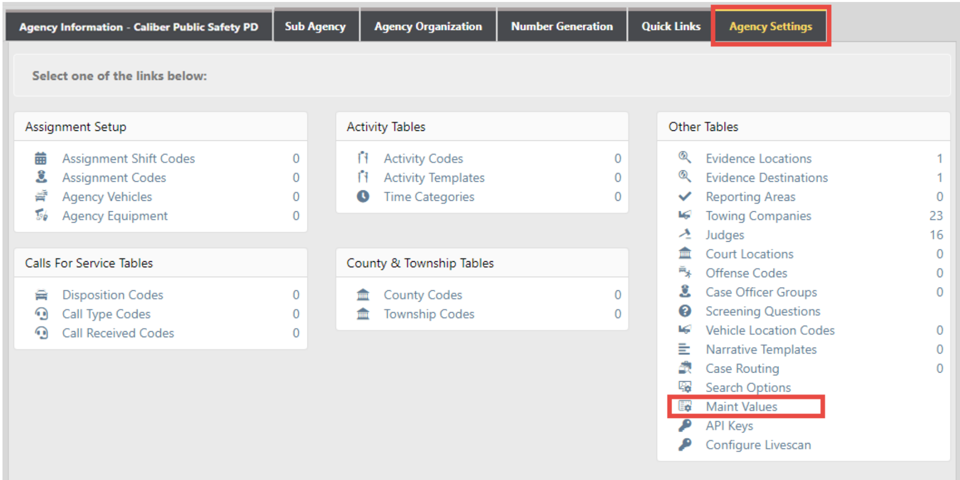
1. Click on the **Administration** top menu, then **Agencies** to open *Agencies*.



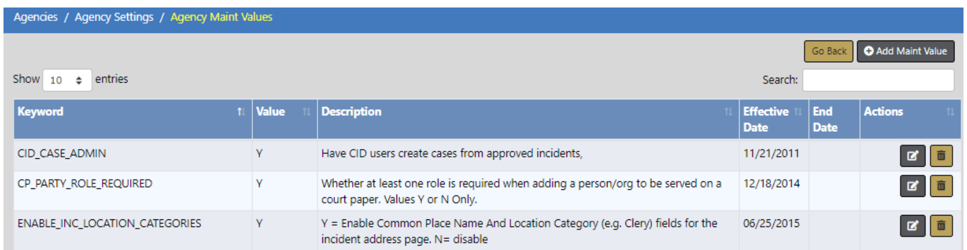
2. Click **[edit]** next to the appropriate agency to open the *Agency Profile*.



3. Click on the **Agency Settings** tab to display setting options, then click on **Maint Values** under the *Other Tables* section.

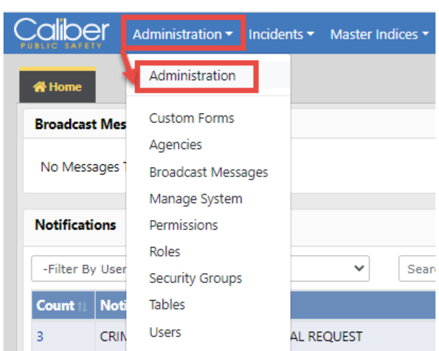


4. The *Agency Maint Values* table opens.

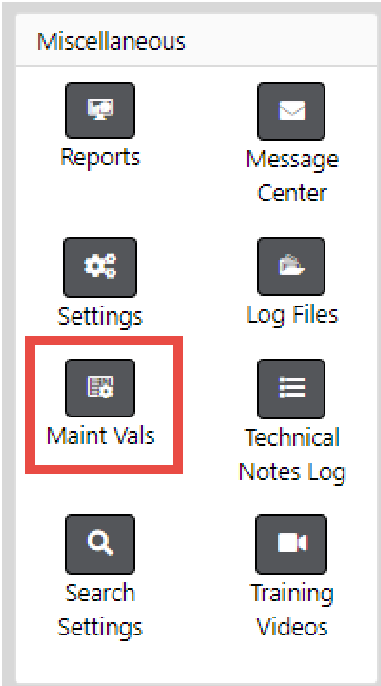


Administration Top Menu

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		

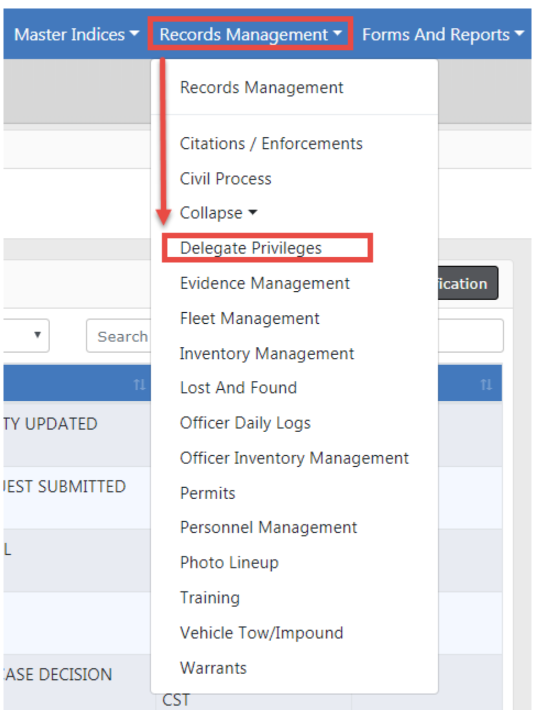
Chapter 22. Delegate Privileges

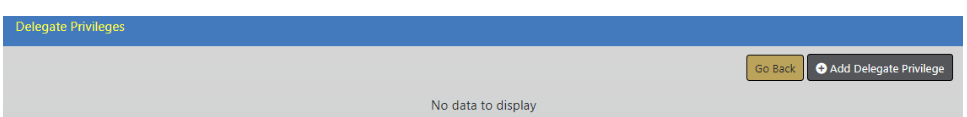
The Delegate Privileges feature allows users with certain administrative functions to transfer their privileges (roles) to other RMS users. For example, a user going away on vacation for two weeks might delegate certain of their roles to another user during that period of time. The next time the delegated 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.

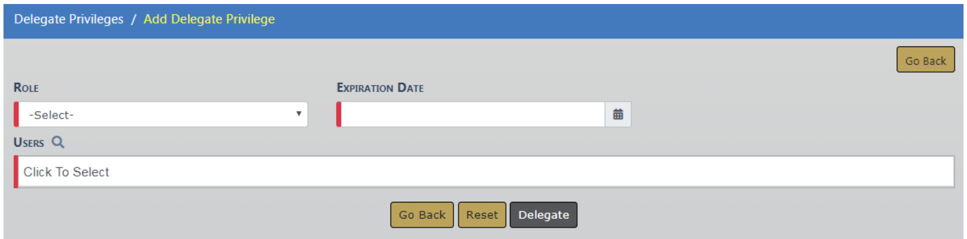
Use the following procedure to delegate privileges.

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 which to delegate privileges. (It may already appear in the field by default, but can be changed.)

4. Enter the **Expiration Date**.

5. Select the **User** by entering in the user's name then selecting the appropriate user(s) from the displayed list, or click on the search icon  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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