Caliber

PUBLIC SAFETY

Protecting Tomorrow–Today.™

Online RMS

11.17.1

User Guide

7 January 2025

Caliber Public Safety

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User Guide

7 January 2025

COLOSSUS, INCORPORATED, 102 West Third Street, Suite 750, Winston-Salem NC 27101.

www.caliberpublicsafety.com

Caliber provides toll-free support to qualified customers. If you have questions, concerns, or would like to send us comments, you can contact us by:

Phone (24/7 support line):	800.274.2911
Fax:	336.722.3479
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
Online RMS11.17.1	User Guide	Phil Elmore

Abstract or Description:

The Online RMS 11.17.1 User Guide contains information and instructions for basic users.

Amendment History

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
5	08/01/2021	Version 11.7.0 Upgrade
6	12/1/2021	Version 11.8.0 Upgrade
7	4/5/2021	Version 11.9.0 Upgrade
8	8/2/2022	Version 11.10.0 Upgrade
9	12/6/2022	Version 11.11.0 Upgrade
10	4/4/2023	Version 11.12.0 Upgrade
11	8/1/2023	Version 11.13.0 Upgrade
12	12/5/2023	Version 11.14.0 Upgrade
13	4/2/2024	Version 11.15.0 Upgrade
14	8/6/2024	Version 11.16.0 Upgrade
15	12/3/2024	Version 11.17.0 Upgrade

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Chapter 1. Introduction

Overview

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

Access to Online RMS begins with the customizable **Home Page**. For more information on the **Home Page** refer to "Home Page - Prior to RMS 11.12" on page 8.

Login Page

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

Production Site

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

Training Site

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

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

Caliber Main Website

https://caliberpublicsafety.com

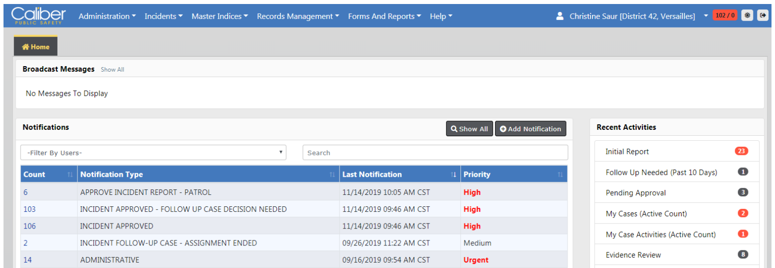
For best performance, Caliber Public Safety recommends using a computer, laptop, or tablet purchased within the last three years; running an industry popular web browser that is actively supported by the browser manufacturer and connects to the internet using DSL, Cable, or 4G cellular. The browser must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

Night Versus Day Mode

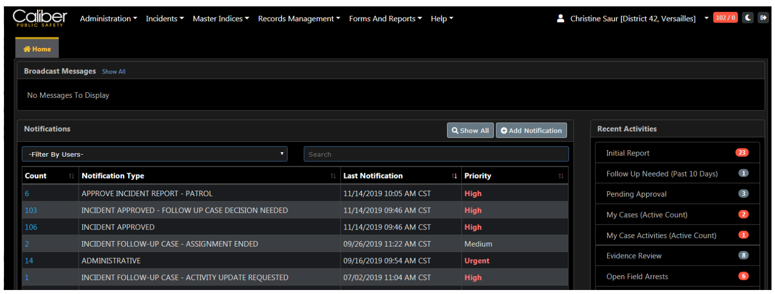
The Online RMS application offers a choice of two background colors: White or Black; **Day Mode** or **Night Mode** respectively. The **Day Mode** background appears by default when the application launches at login; however, you can set your **Mode Preference** to default to **Night Mode** if you wish.

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

Day Mode



Night Mode



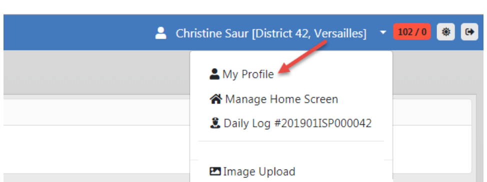
Set Mode Preference

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

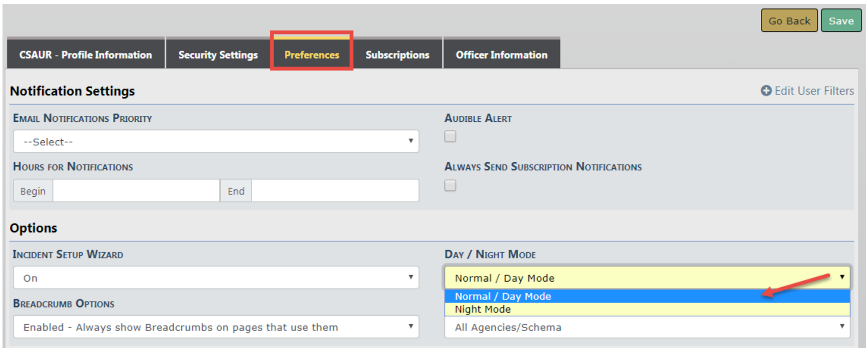
Default Mode

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

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



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



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

Toggle Mode

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

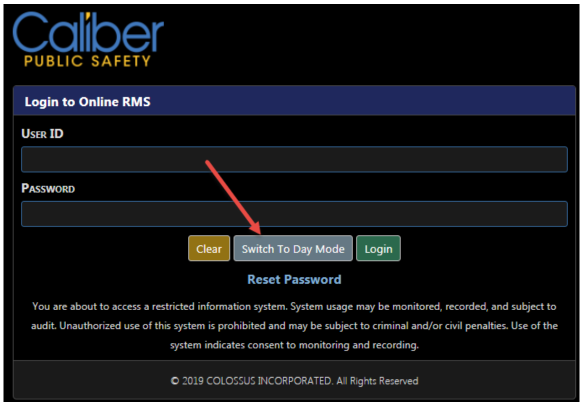
There are two ways to toggle between **Modes**:

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

Login Screen

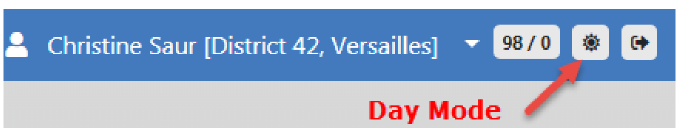
Click the **Switch to Night Mode** button to change the background color from white to black.

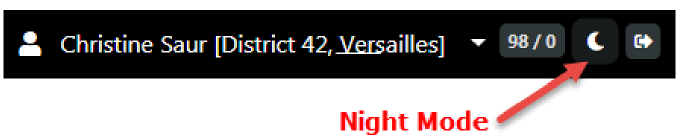
Click the **Switch to Day Mode** button to change the background color from black to white.



Dashboard

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





Password Rules

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

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

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

- This option is configurable at the schema level for sites requiring expiration days different than the default configuration. Contact Caliber Support for assistance in updating this configuration setting.

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

Notes:

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

Password Reset

There are three ways to reset a password:

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

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

Forgotten Password

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

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

Reset Password via Email

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

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

   Note: There is also a **Reset Password via Email** button on the *Change Password* link of My Profile. For information on My Profile, refer to "My Profile Overview" on page 51.

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

Change Password from My Profile

1. Click **Change Password** on My Profile. For more information, refer to "My Profile Overview" on page 51.

Administrator Password Reset

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

User Account Inactivity Deactivation

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

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

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

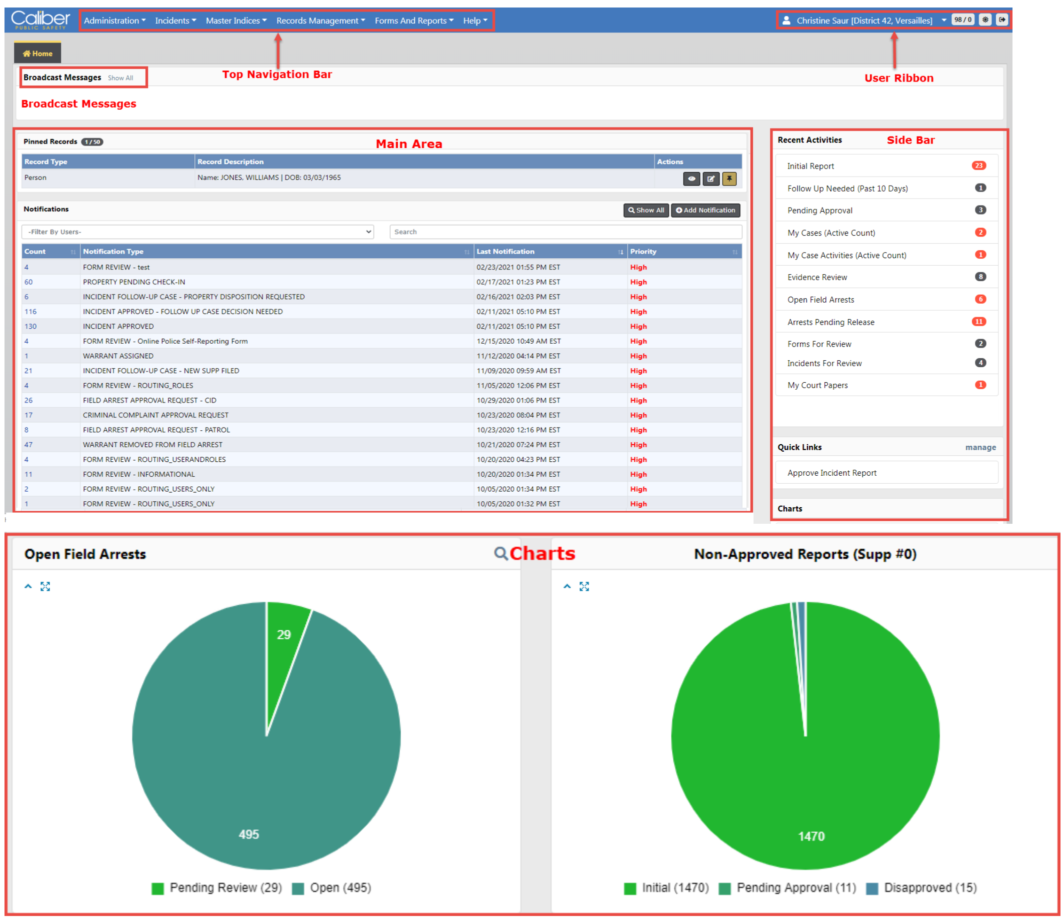
For more information refer to the agency administrator.

Home Page - Prior to RMS 11.12

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

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

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



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

For information on managing the **Home Page** layout, refer to the *Manage Front Screen Layout* section of "User Information Menu" on page 45.

Main Area

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

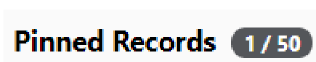
Refer to the *Manage Front Screen Layout* section of "User Information Menu" on page 45 for instructions.

Pinned Records

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

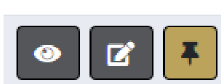
By default, you can pin up to 50 records.

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



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

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



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

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

Notifications

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

For more information on *Notifications*, refer to "Notifications" on page 25.

Top Navigation Bar Area

The Top Navigation Bar provides access to Incidents, Master Indices, Records Management, Forms and Reports, and Help menus.

The Help menu includes a variety of links for submitting a ticket, accessing live and online help and training resources, requesting live assistance, and accessing the Caliber Marketplace (a menu of features and interfaces).

The Administration menu also appears for users with proper permissions.

The Top Navigation Bar adapts to mobile devices by utilizing a Collapsible Menu. For more information, refer to "Mobile Device Friendly" on page 18

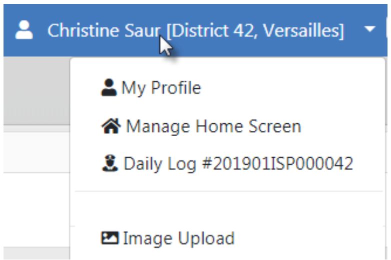
User Ribbon

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

The User Ribbon adapts to mobile devices by utilizing a Collapsible Menu. For more information, refer to "Mobile Device Friendly" on page 18

User Information Menu

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

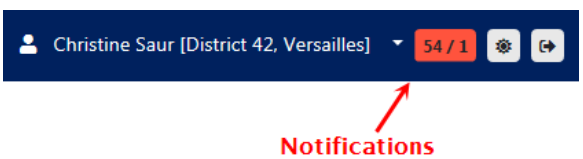


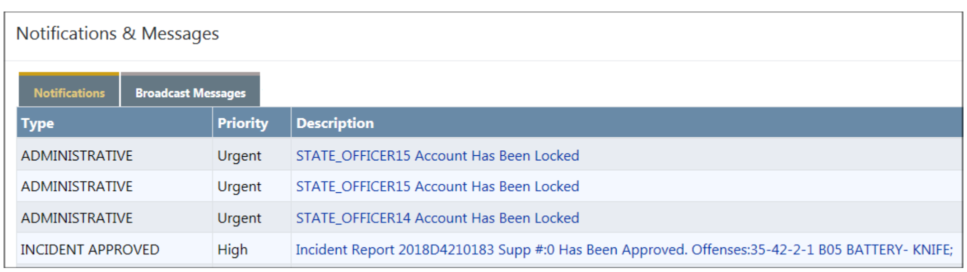
For more information on these options, refer to "User Information Menu" on page 45.

New Notification Alert

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

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





Notifications & Messages

Notifications | Broadcast Messages

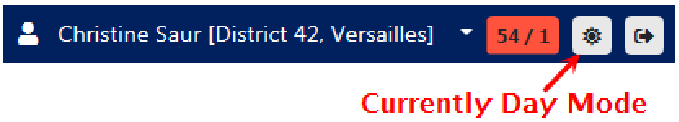
Type	Priority	Description
ADMINISTRATIVE	Urgent	STATE_OFFICER15 Account Has Been Locked
ADMINISTRATIVE	Urgent	STATE_OFFICER15 Account Has Been Locked
ADMINISTRATIVE	Urgent	STATE_OFFICER14 Account Has Been Locked
INCIDENT APPROVED	High	Incident Report 2018D4210183 Supp #:0 Has Been Approved. Offenses:35-42-2-1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

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

For more information on notification alerts, refer to "Notifications" on page 25.

Toggle Night Versus Day Mode

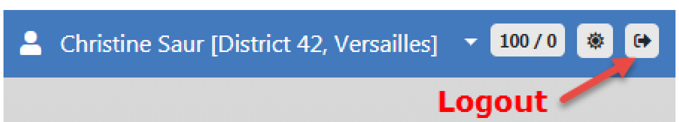
Click on the Night/Day mode icon on the User Ribbon to toggle between the two settings. When Day Mode is active, a sun-like image appears as the icon, and a moon for Night Mode.



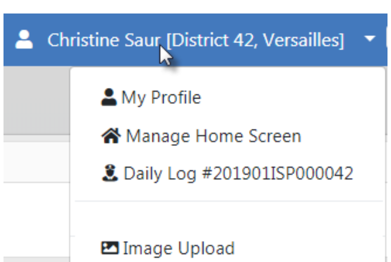
For more information on Night and Day Modes, refer to "Night Versus Day Mode" on page 2.

Logout

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



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



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

For more information on the *User Information Menu*, refer to "User Information Menu" on page 45.

Recent Activities

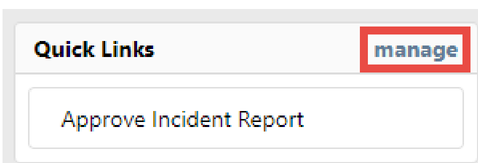
The **Recent Activities** section that appears on the right side of the Home Page allows quick access to edit a user's Incident reports, Cases, Warrants, Open Field Arrests, Open Forms, Evidence Review, My Court Appearances, Forms for Review, and other areas specific to the logged in user.

Quick Links

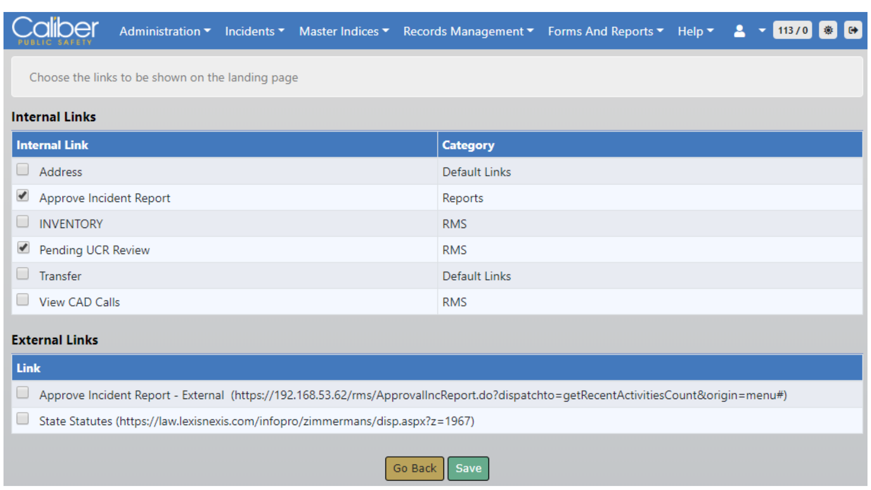
Quick Links that appear on the side bar of the Home Page allows for quick access to different areas and define processes within Online RMS. You can manage which links you want to see here.

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

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



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

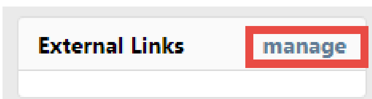


External Links

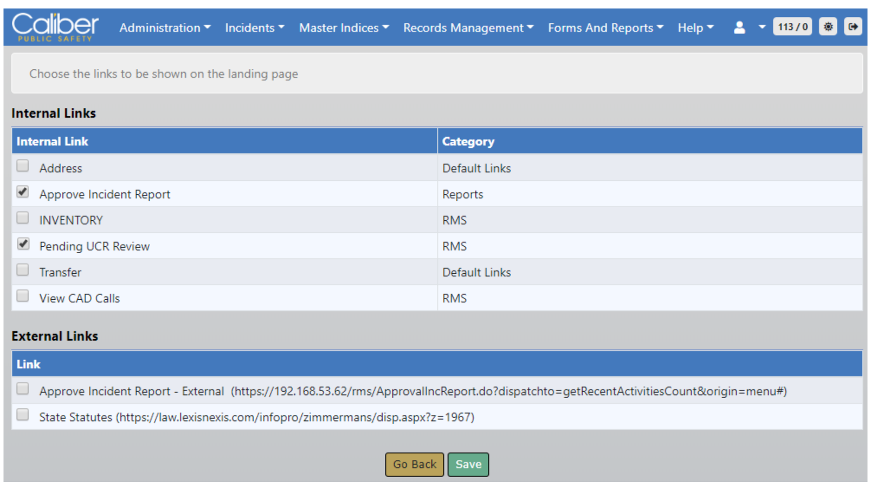
External Links that appear on the side bar of the Home Page allow quick access to external sites which open in a new browser. These are made available by your administrator. You can manage which available links you want to see on your Home Page.

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

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



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



Charts

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

Home Page - RMS 11.12 and Higher

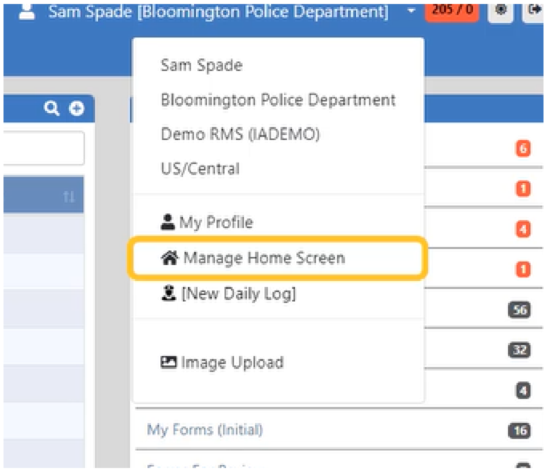
Starting with RMS 11.12.1, select users will have the option to choose a new, optional home screen interface. This new home screen retains all the functionality of the previous home screen in an updated layout.

You may still filter notifications and search notifications, as well as sending notifications by selecting the plus sign in the top-right corner.

Other available features work the same as in previous versions. (Pinned records work the same, for example.) The charts section is permissions based; pie charts can be found under Offense Activity.

Quick links and external links offer the same features and functions; just moved from right to left on the new home screen.

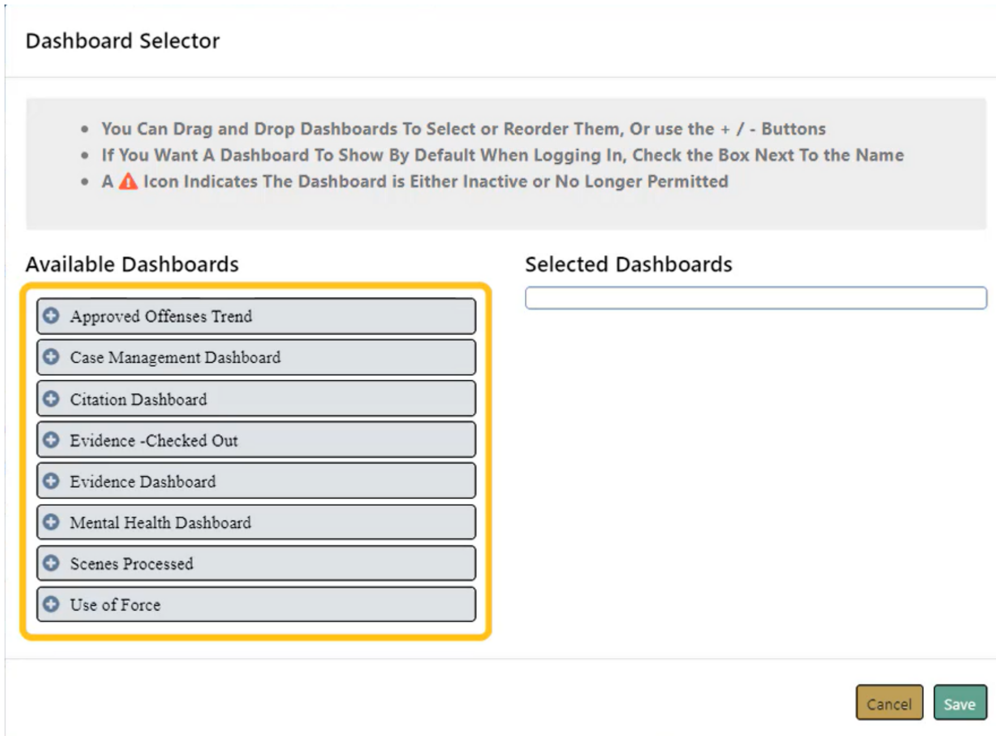
If you decide to use the new home screen, the **Manage Home Screen** section under the **My Profile** tab will not work. This section is for use with the old home screen only as of the release of RMS 11.12.



Additionally, beginning with RMS 11.13.0, Dashboards will be available that can be configured by Caliber in coordination with your agency to better serve your needs. (The dashboards only work with the new home screen, not the previous home screen. The new home screen will become the default in a future release.) Users may select from among the available dashboards by clicking the gear icon next to the **Dashboards** heading on the left side of the screen.

To utilize dashboards, an agency will have to request access. Permissions are assigned by schema and role. The dashboards icon will only be visible if there is a dashboard or dashboards available; Available dashboards will vary based on agency.

The dashboards provide a variety of information (such as case management, evidence, scenes processed, use of force incidents, etc.} that can be selected for optimum user efficiency based on what data is most needed.



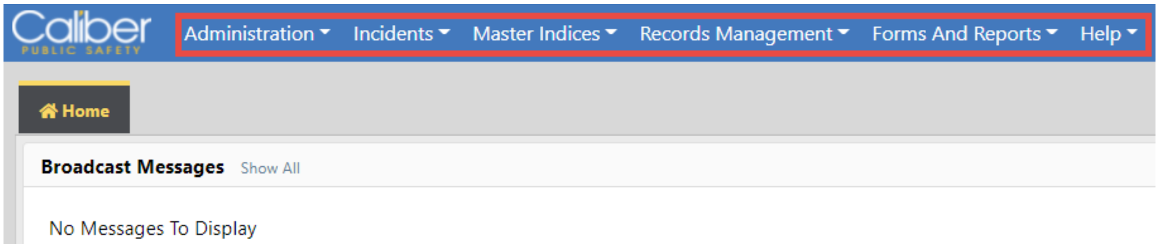
After making changes to displayed dashboards, make sure to refresh (otherwise the new dashboards will not be visible).

This feature is being rolled out starting with RMS 11.12.1. For more information, Contact Caliber or submit a support ticket.

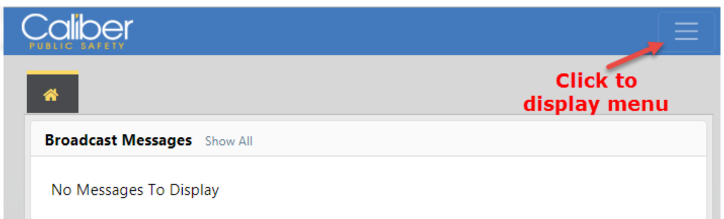
Mobile Device Friendly

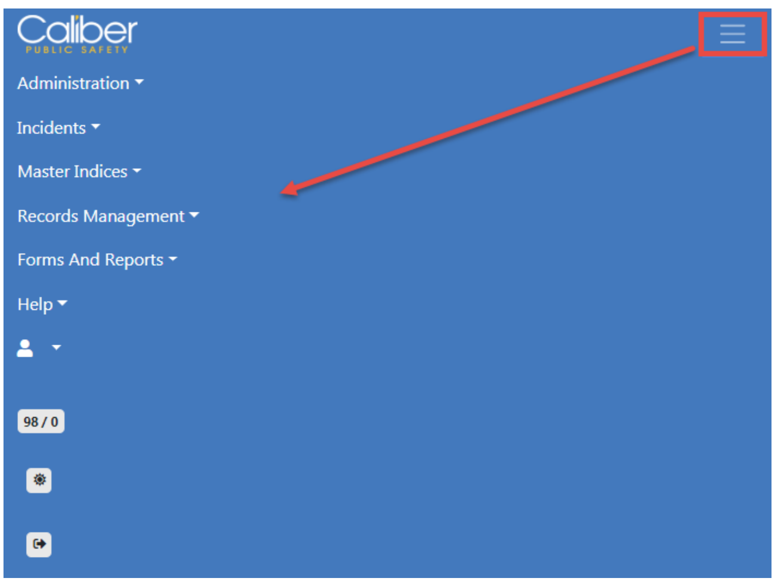
Online RMS content easily adapts to devices of various sizes by leveraging a scalable, responsive web-based design. Online RMS auto-adjusts layout and content according to the screen size, making navigation easy on any mobile device.

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

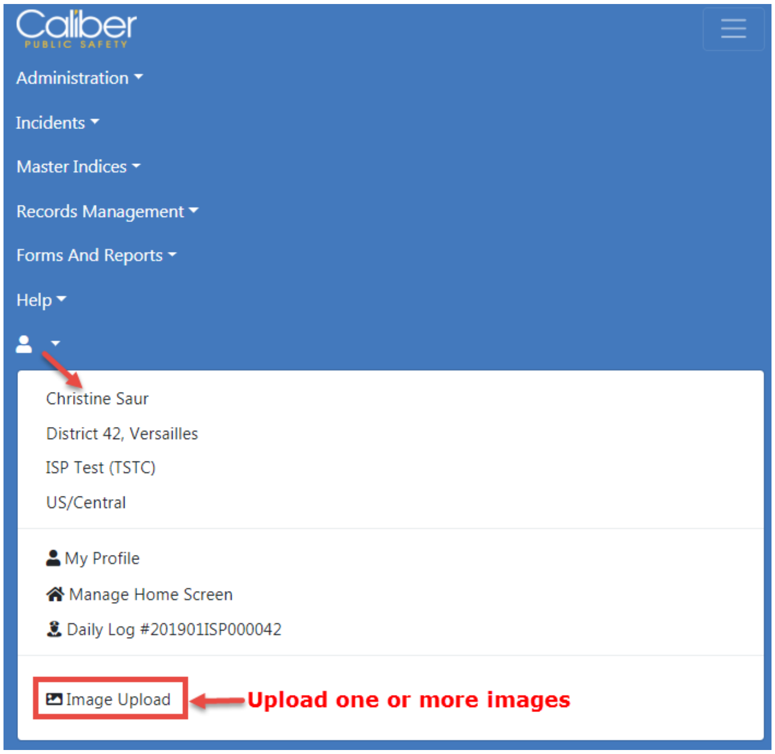


On smaller screens, such as mobile devices, a **Collapsible Menu** appears on the top right. Click on the **Collapsible Menu** to display various drop-down menus on the left of the screen, and click again to close.





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



Upload one or more images directly from your mobile device to your personal RMS Image Library. You can then easily import the images from the Image Library into an incident report, field arrest, or master person record. For more information on uploading images to the Image Library, refer to "Image Library" on page 75.

Broadcast Messages

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

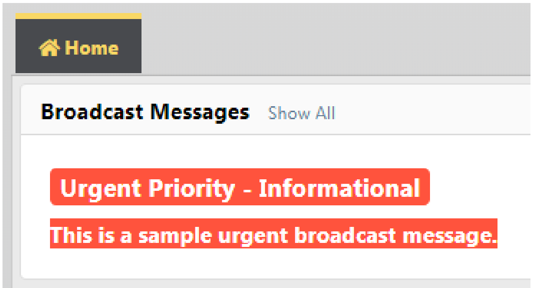
The information can be enforcement related, informational, or administrative in nature. **Broadcast Messages** relay administrative messages to users such as mandatory meeting or firearms qualification notices as well as time sensitive information such as an Attempt to Locate notice for a stolen vehicle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

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

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

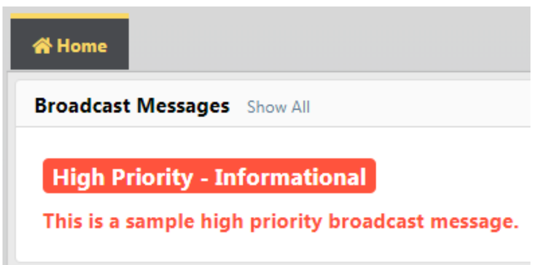
Urgent Priority Message

Full color coding of the message.



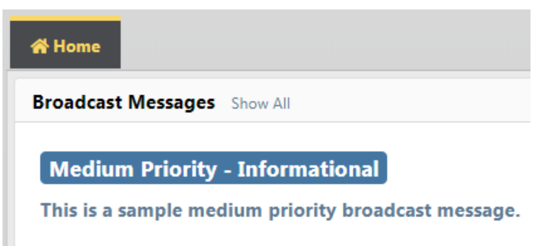
High Priority Message

Color Coding of high priority message.

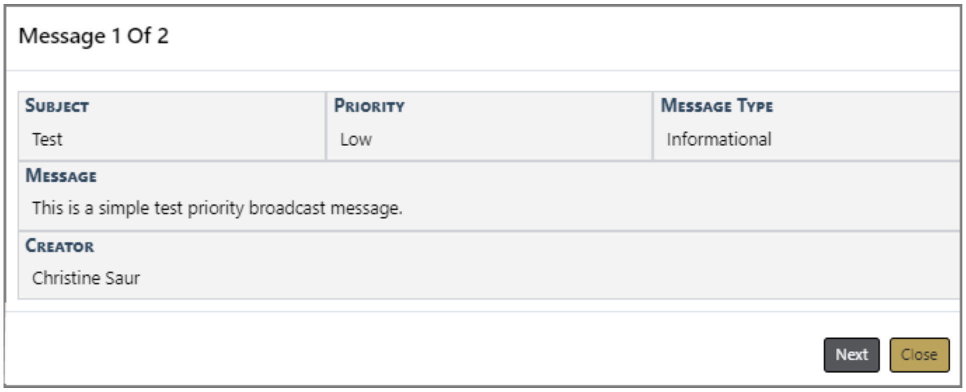


Medium Priority Message

Color coding of medium priority message.

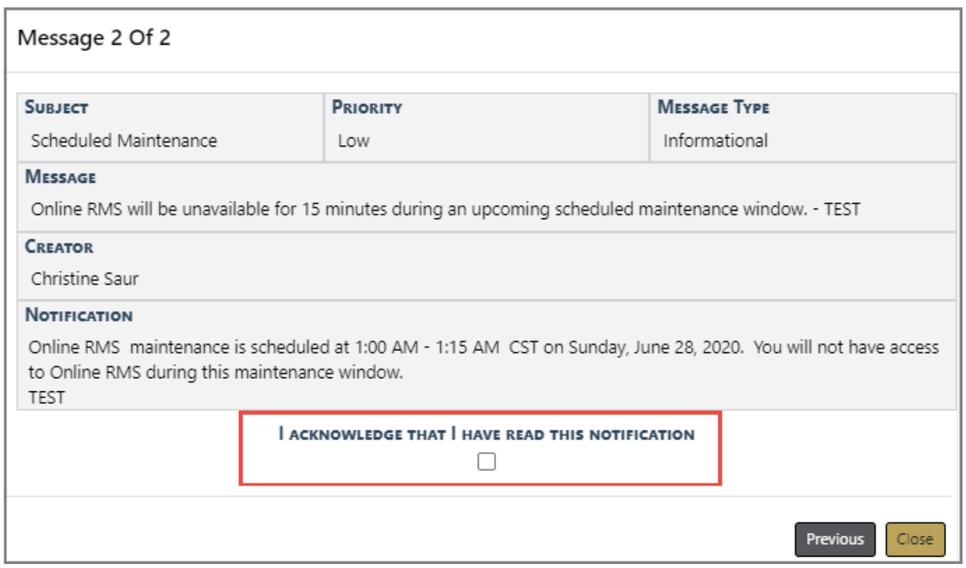


When more than one **Broadcast Message** is in the queue, each message will display for approximately fifteen seconds before transitioning to the next message. This will continue to the last message before starting the sequence again. You can display all messages in the queue by clicking on the message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



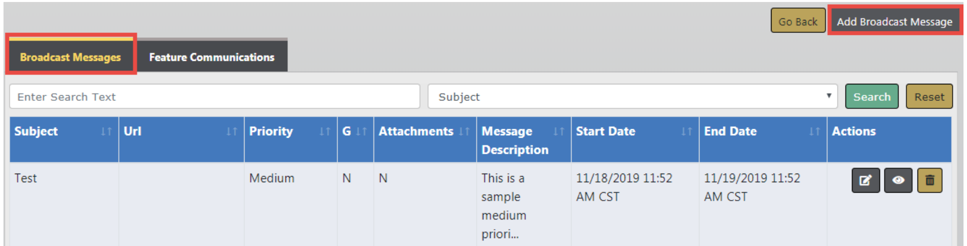
Click on the **Next** button to view the next message, if applicable.

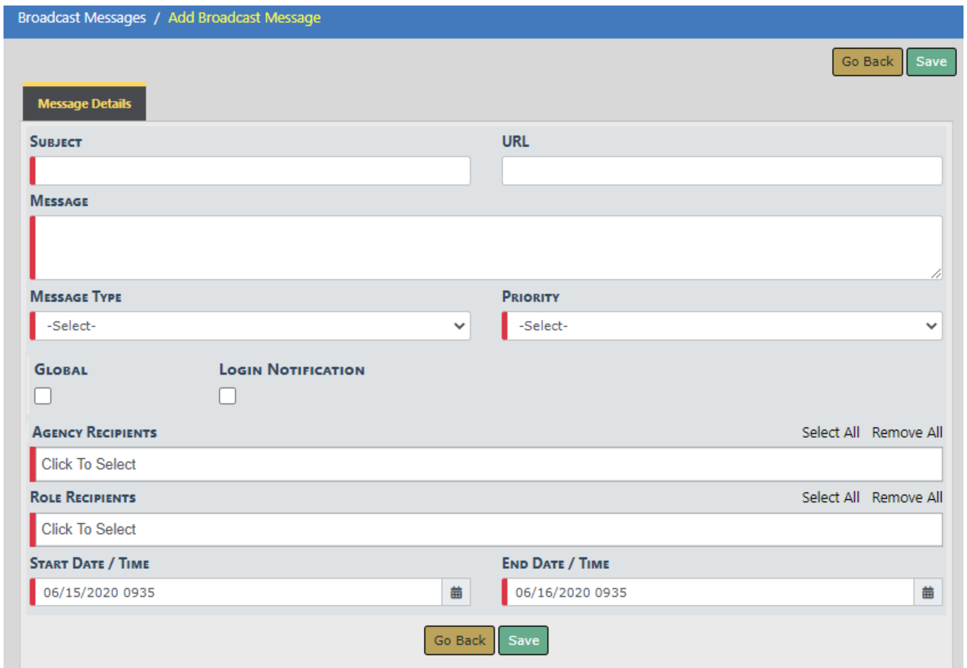
If a message requires acknowledgment, the message appears every time you log in, until you select the **Acknowledgment** checkbox.



Adding a Broadcast Message

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





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

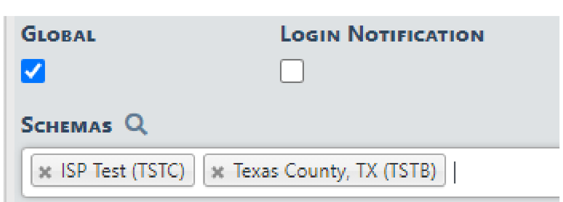
2. Enter a **Subject**.

3. Optionally enter a **URL**.

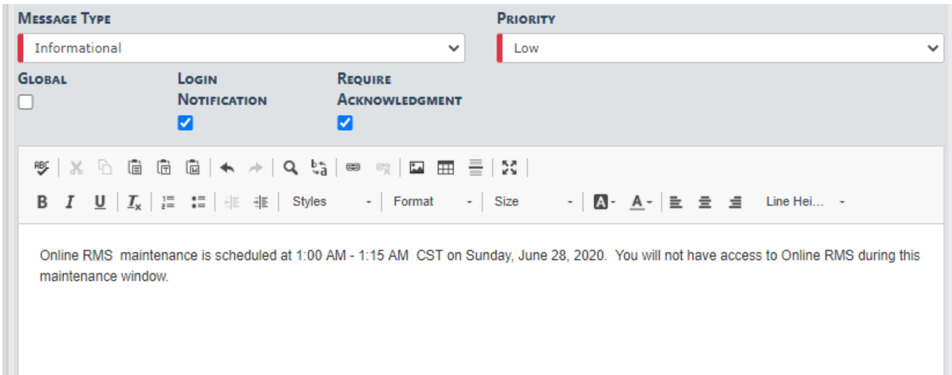
4. Select the **Global** checkbox if you want to send the notification to schemas rather than agency recipients.

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

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



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



   a. When you select the **Login Notification** checkbox, a text editor opens, where you can enter a message and format the content.

   b. Select the **Require Acknowledgment** checkbox if you want to require users to acknowledge the message. If this option is checked, the message appears every time a user logs in, until the user acknowledges the message.

6. Select **Agency Recipients**. Choose one or more listed agency in the agency's schem-a/workgroup.

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

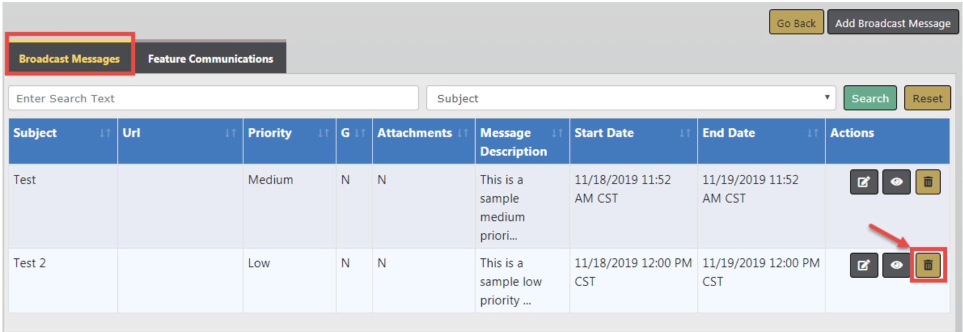
7. Select one or more **Role Recipients**.

8. Click **Save** to create the message, or click **Back** to return to the Message Center.

Deleting a Broadcast Message

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

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



Notifications

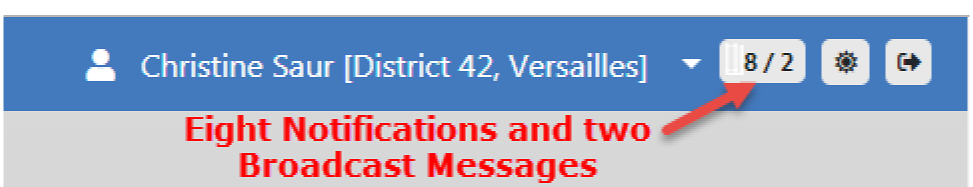
This area presents a grouped list of all **Notifications** for the user. The **Notification Types** can be:

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

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

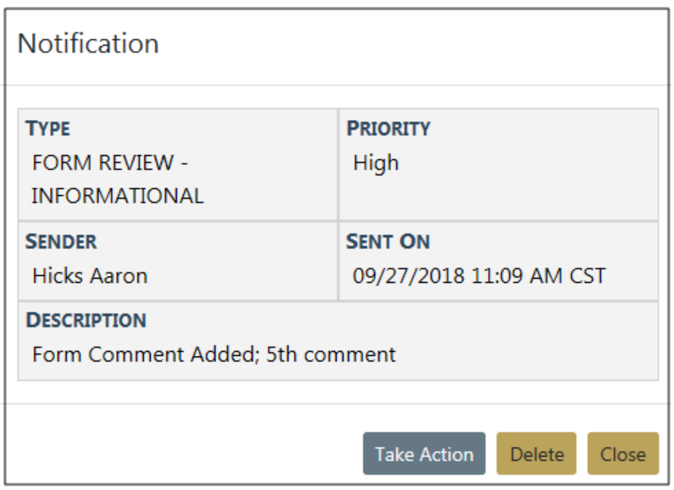
New Notifications

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



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

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



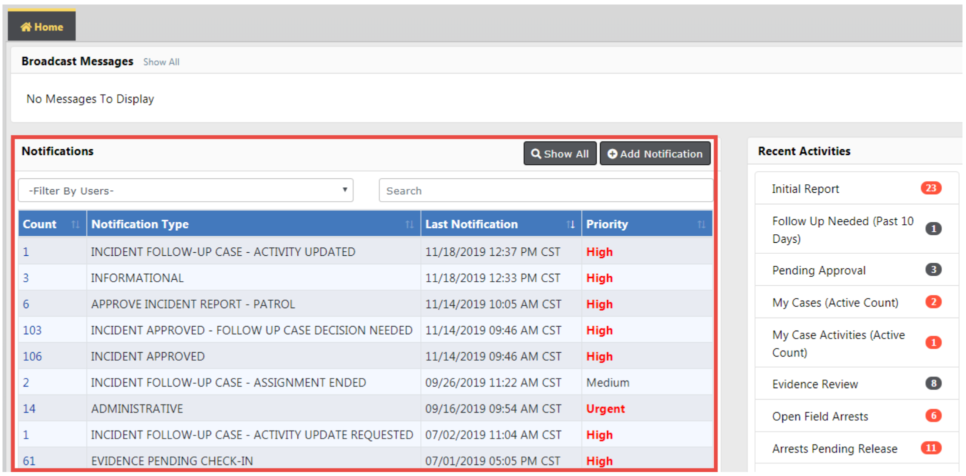
Depending on the type of notification, it can be canceled, replied to, reassigned, deleted, or acted on. The action buttons that appear on the bottom of the window vary by type of notification.

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

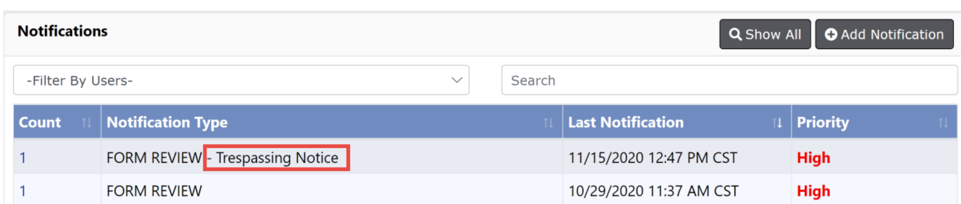
Click **Close** to close the window.

Show All Notifications

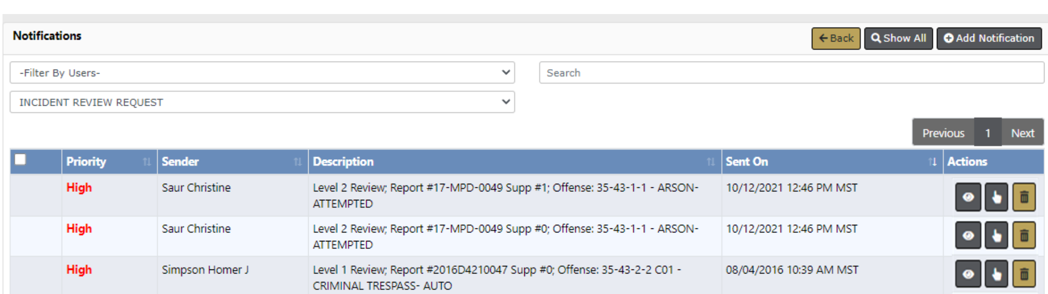
A list of all your notifications are displayed on the **Home** screen in a grid. A maximum number of notifications appear in the grid at one time. The **Count** of each **Notification Type** displays on the left.



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



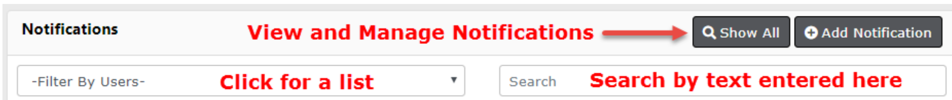
To see all Notifications for a particular **Notification Type**, click on the **Count** in the first column of that Notification Type. In the below example, three Incident Review Request records display.



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

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

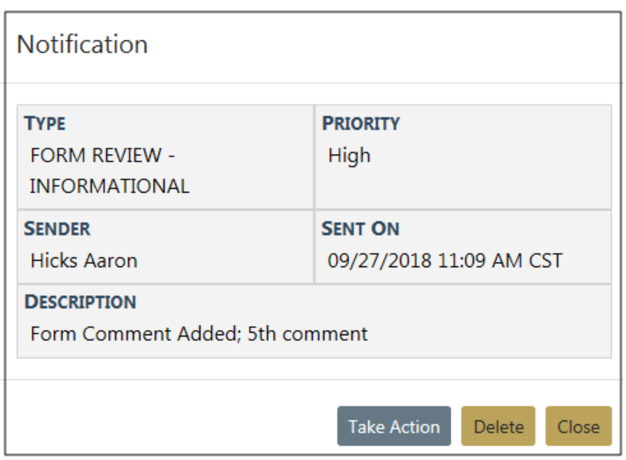
If you set up **User Groups** then you see the **Filter By Users** option. For more information on **User Groups** refer to your agency administrator.



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

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

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

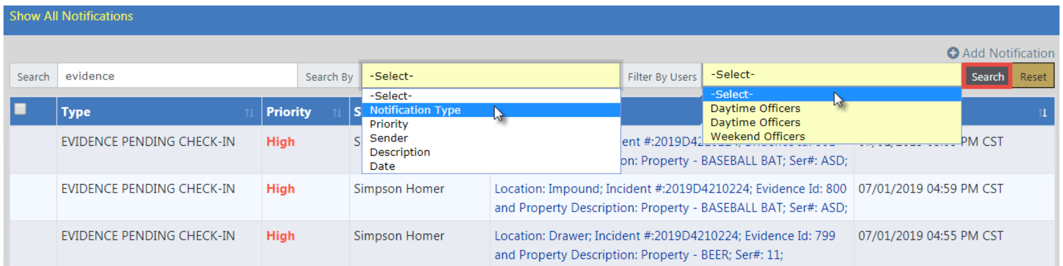


Depending on the type of notification, it can be canceled, replied to, reassigned, deleted, or acted on.

Search Notifications

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

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

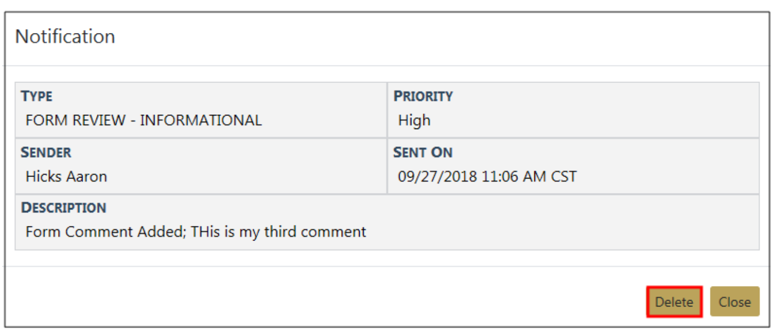


Click the **Reset** button to clear the entered Search text.

Delete Notifications

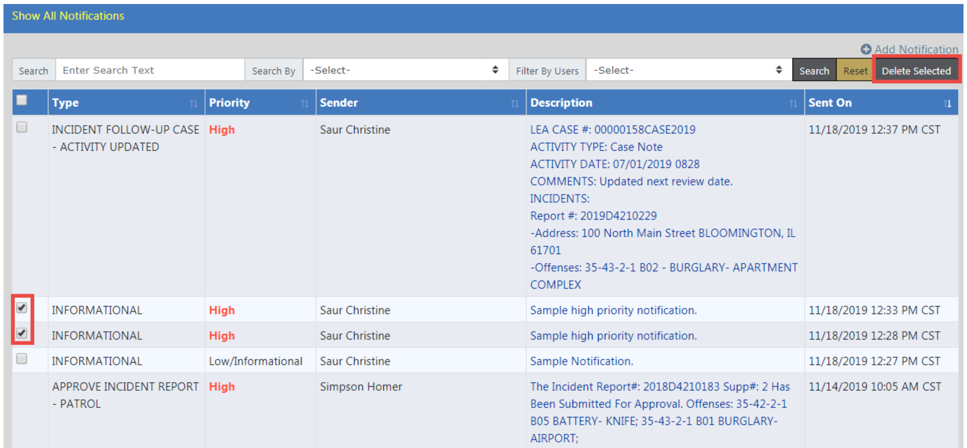
There are up to four ways to *Delete* Notifications that have the delete option.

- From the **New Notification** message. Refer to "New Notifications " on page 25.



- From the link in the **Description** column of the **Show All** notifications grid. Refer to "Show All Notifications" on page 27.

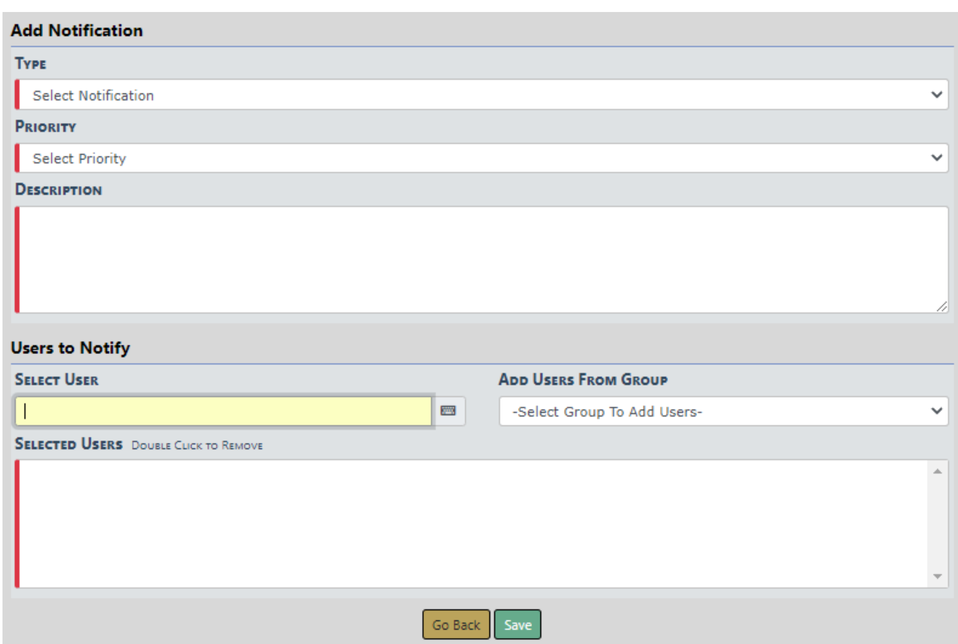
  Check the box in the **Show all** notifications grid.
  Check the box next to the notification you want to delete, then click **Delete Selected** when the button appears.



- Click on the **count number** under the Count column in the Notification grid, then click the **Delete icon** under the Actions column. Refer to "Show All Notifications" on page 27.
- For *view only* informational Notifications:
  - When taking action on a view only information Notification, click on the **Take Action & Delete** button to take action and delete the notification.

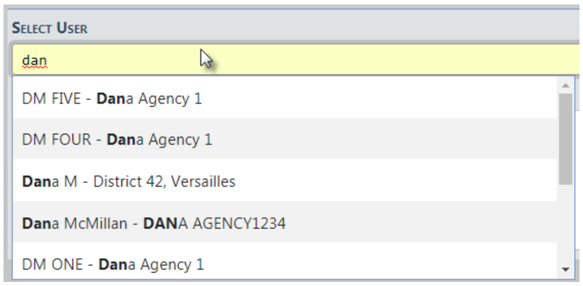
Add Notifications

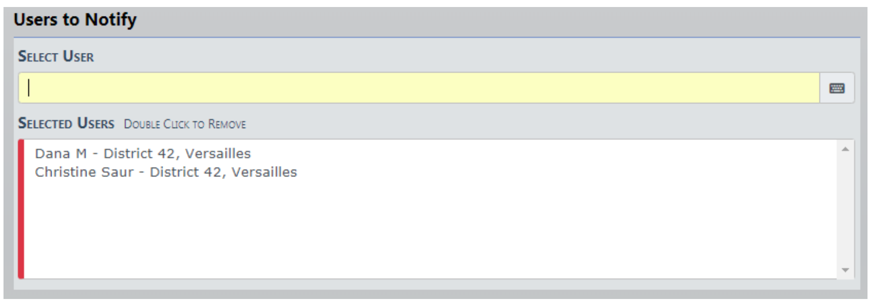
User-initiated notifications can be sent by clicking the **Add Notification** link to display the Add Notification screen.



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

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





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

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

Entering Dates and Times

Dates and times can be entered using different methods.

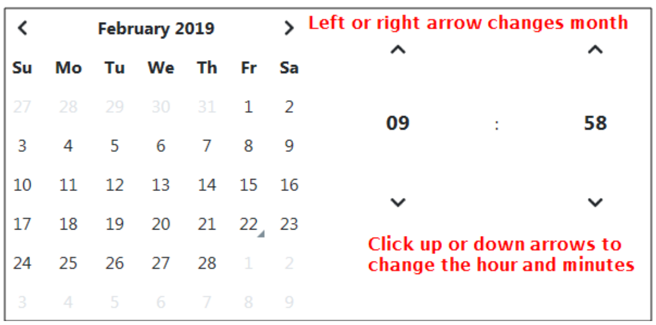
- Type a **T** in the date field then tab out to return the current date and time.
- Type **T-#** (# represents the number of days) to return a date/time less than the current month.
  - Example: If today is 03/05/2019, enter **T-1** to return the date 03/04/2019.
- Type **T+#** (# represents the number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

- Use the **Calendar Tool**, the icon to the right of the date and time field.

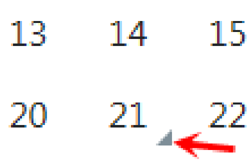
Calendar Tool

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

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



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



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

Text Fields, Drop-Downs, Buttons, Check Boxes

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

Text Fields

Type information directly into the field.

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

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

Drop-Down Lists

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

Buttons

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

Function Buttons

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

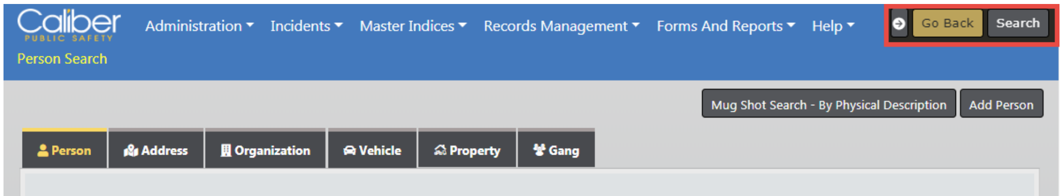
Radio Buttons

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

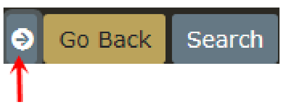
Size: ○ Small ◉ Medium ○ Large

Floating Buttons

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



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

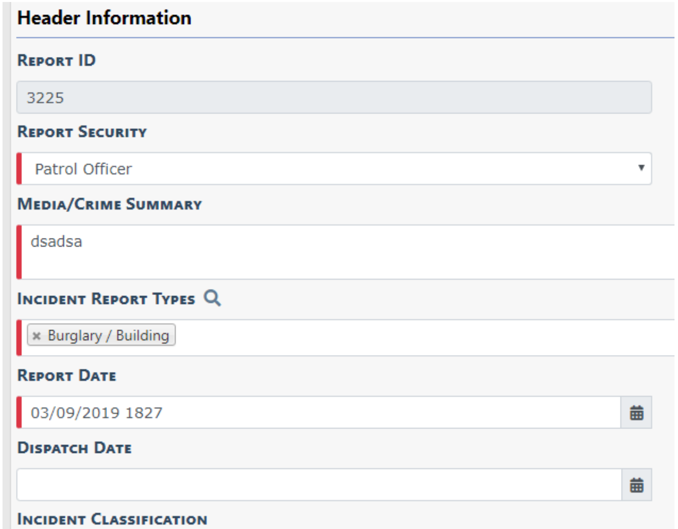


Check Boxes

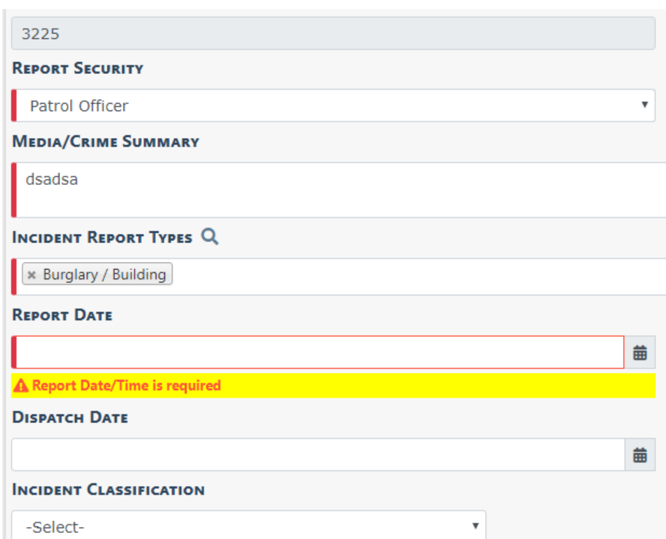
Click the box to select (insert a check mark) or deselect (remove a check mark) to activate or deactivate an option, or to filter a list by one or more parameters.

Required Fields

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



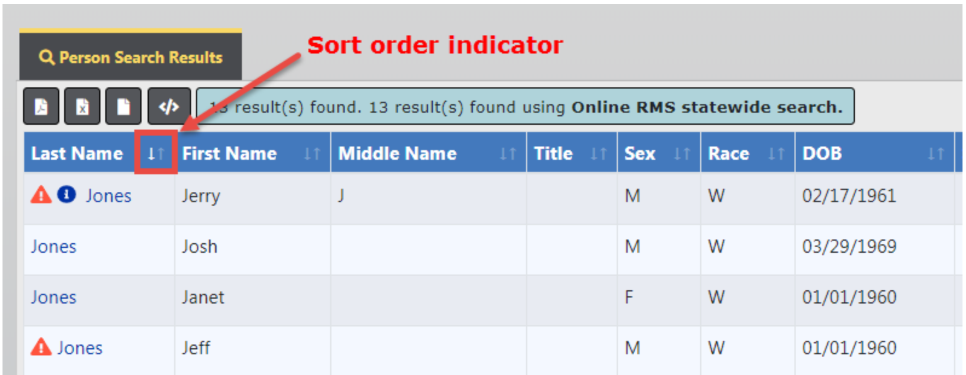
You must complete required fields to continue. If you do not supply a value in a required field, a descriptive message highlighted in yellow displays directly below the field.



Column Sorting

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

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



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

SmartSearch

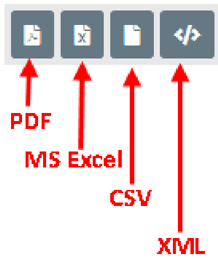
Users can search for incidents across all agencies in the Online RMS system within the user's State, or agencies can choose to share data with other agencies outside of their State. This search adds a simple interface to perform searches the way one would in an Internet search engine, such as Google.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

For details on using Incident **SmartSearch** refer to the Incident"SmartSearch" on page 271 .

Export Search Results

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

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



- PDF (Printable Document Format)
  - File that contain a captured image of a printed document.
  - The file opens into a new tab in your browser, where you can choose to save as a file on your computer.
- MS Excel
  - Microsoft Excel is an electronic spreadsheet; typically used for storing and calculating data.
  - Gives you the option to open the document or save to a file on your machine.
  - **Note:** Online RMS supports MS Excel export up to 5,000 records.
- CSV (Comma-Separated Values)
  - Files that contain a collection of data in a standard format; typically used for exchanging data between applications that support CSV files.
  - Gives you the option to open the document or save to a file on your machine.
  - **Note:** Online RMS supports CSV export up to 5,000 records.
- XML (Extensible Markup Language)
  - A plain text file that contains a collection of data with a defined set of structure and storage rules of that data; typically used for websites.
  - Gives you the option to open the document or save to a file on your machine.

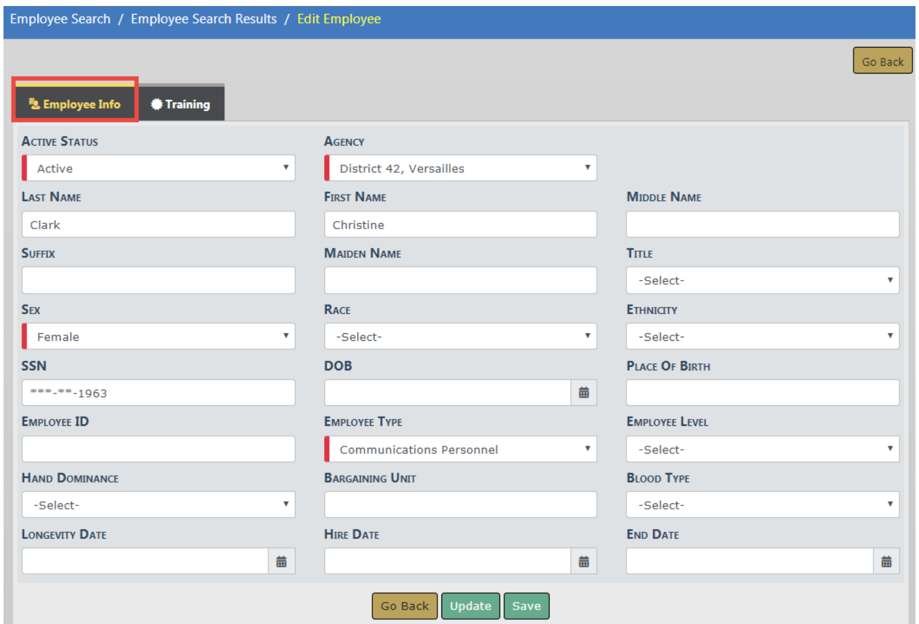
Personnel Management

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

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

Employee Info

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

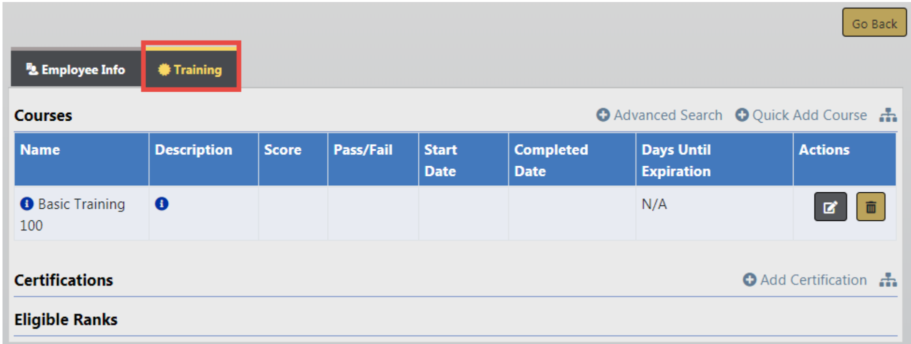


The Employee record opens to the *Employee Info* tab by default.

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

Training

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



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

Printing from Online RMS

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

Print Icon: 

Print Button: 

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

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

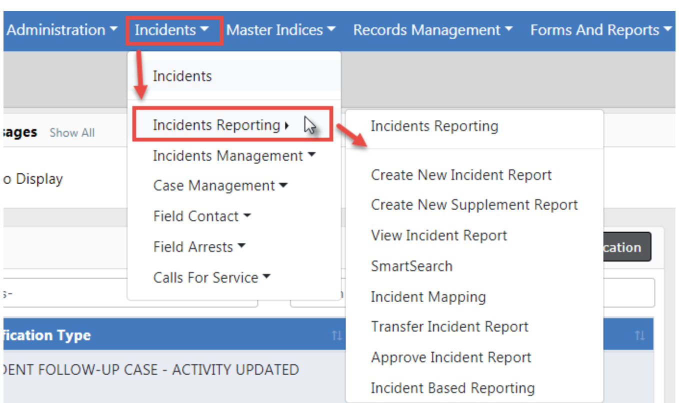
Chapter 2. Navigation Icons

Home Button

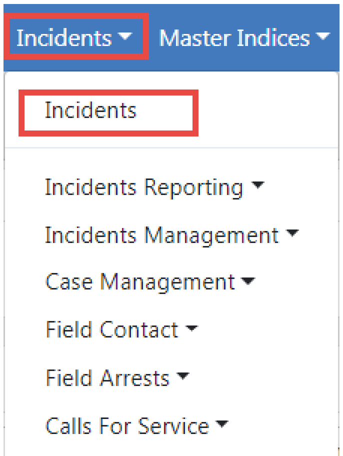
Click on the Caliber logo in the upper left corner of the window to return to your **Home Screen**, regardless of what area of the application in which you are working.

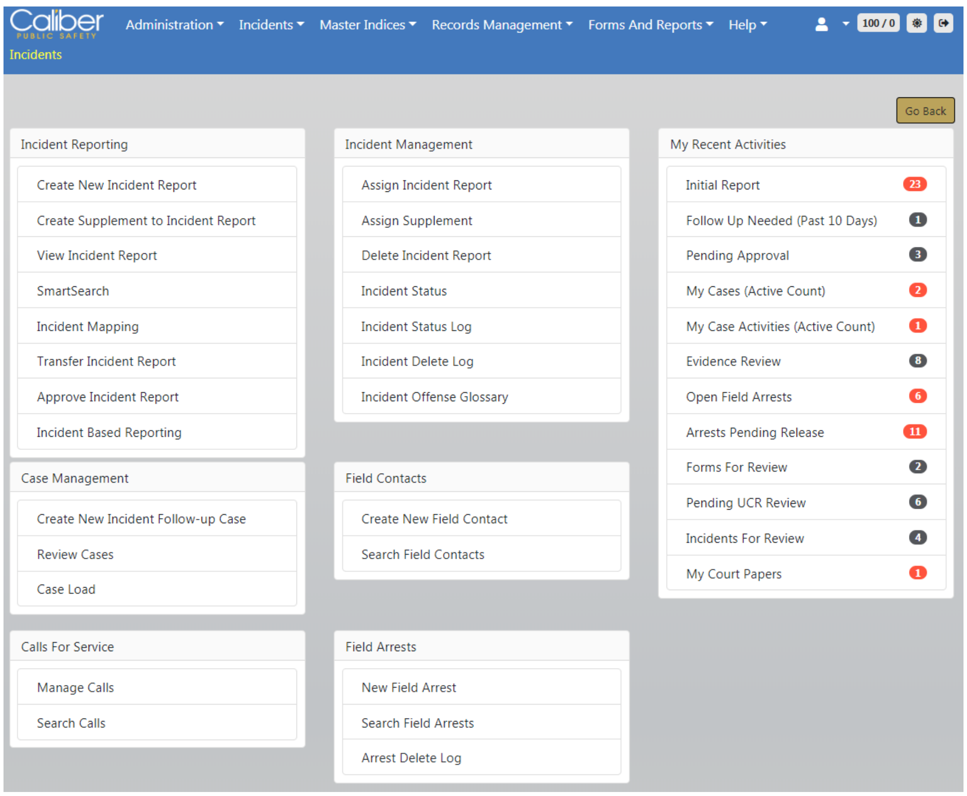
Incidents Button

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



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





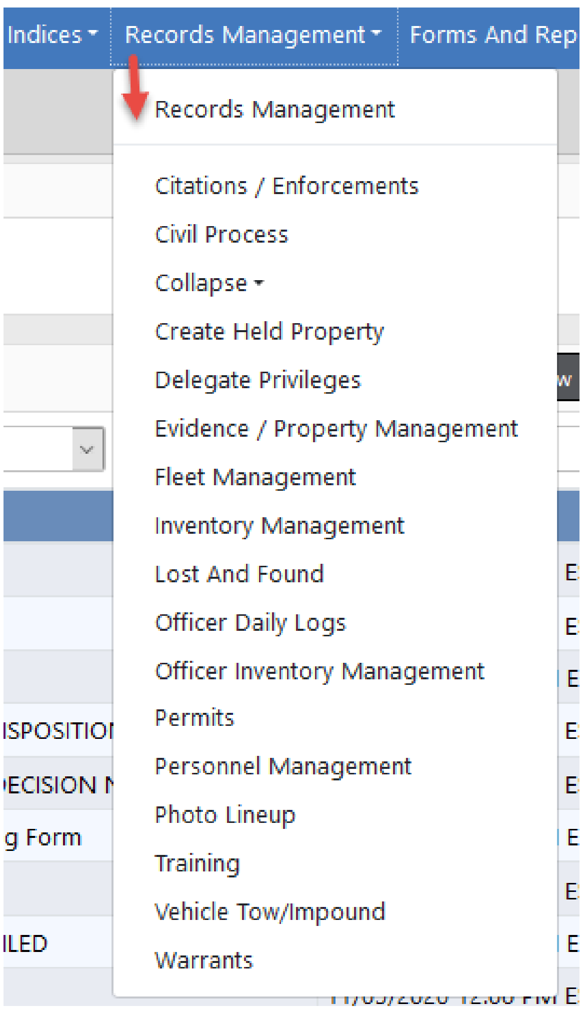
Your *Recent Activities* also appear on right of this screen.

Master Indices Button

The **Master Indices** button is located on the navigation bar at the top of the Online RMS window. The down arrow on the right of the button indicates additional menu options are available. Click on the **Master Incides** button to display menu options. For more information, see "Master Indices" on page 83. The menu options vary by agency and permissions.

Records Management Button

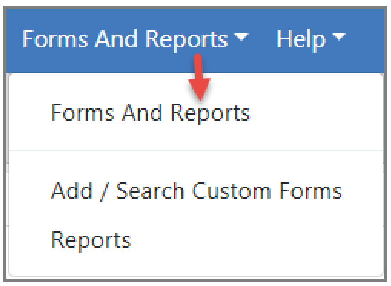
The **Records Management** button is located on the navigation bar at the top of the Online RMS window. The down arrow on the right of the button indicates additional menu options are available. Click on the **Records Management** button to display menu options. The menu options vary by agency and permissions.



Forms And Reports Button

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

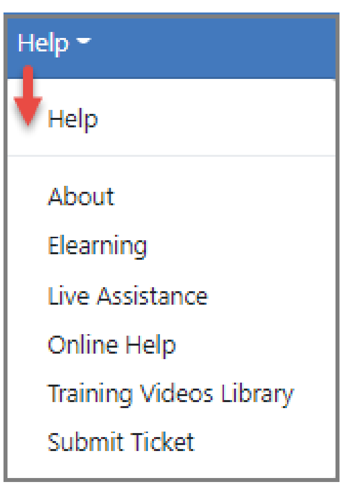
The menu options vary by agency and permissions.



For more information on *Custom Forms* and how to search for and view them, refer to “Custom Forms” on page 65.

Help Options

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



About

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

ELearning

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

Live Assistance

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

Online Help

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

Training Videos Library

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

Submit Ticket

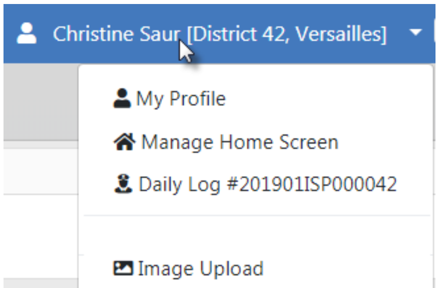
All users have the ability to submit a ticket to our Support Team 24 hours a day. Support tickets will be responded to by the Support Team within one business day, during regular business hours (ET). For more urgent issues please call 800.274.2911.

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

For more information on submitting tickets, refer to "Submit Ticket" on page 63.

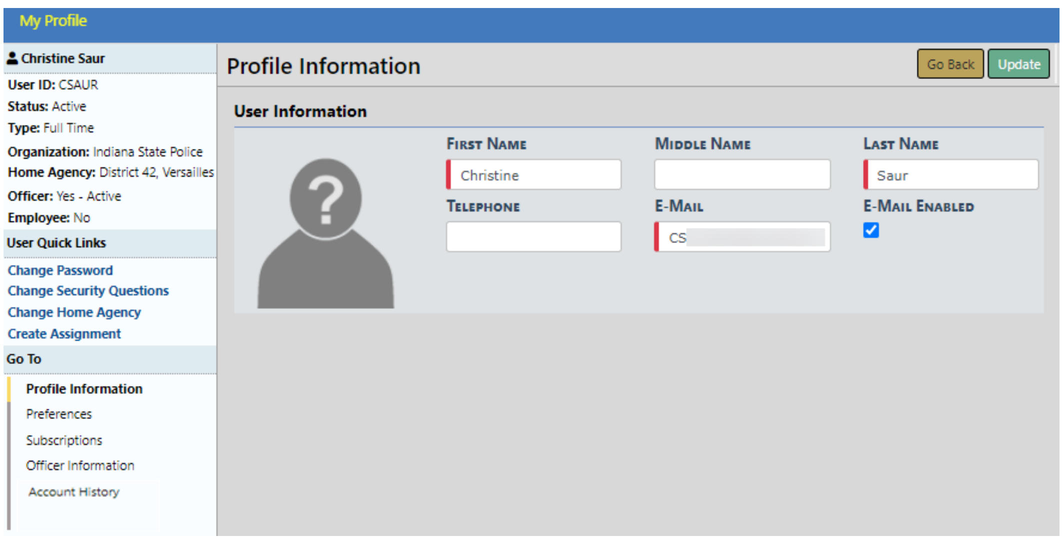
User Information Menu

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



My Profile

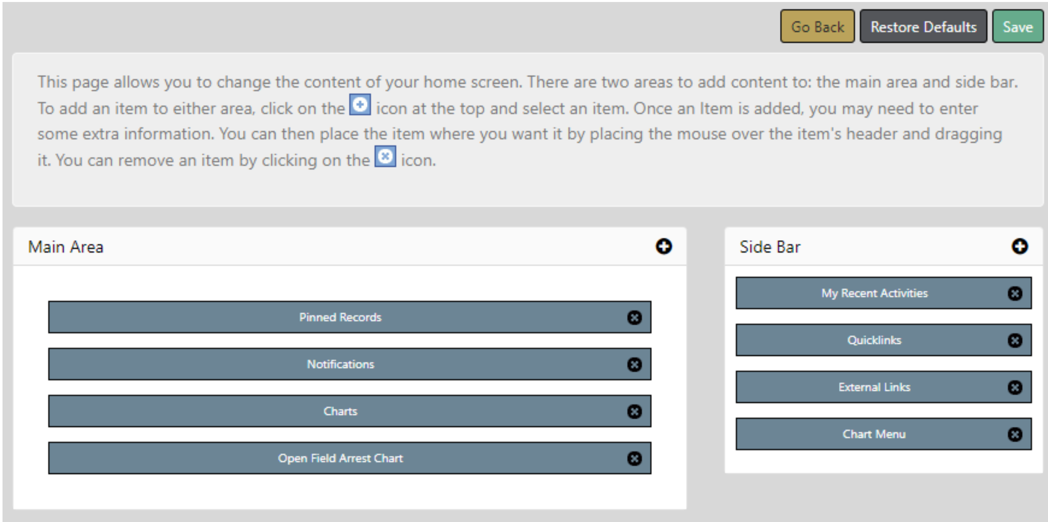
My Profile is a page that contains an organized set of links to various user settings and functions.



For more information, refer to "My Profile Overview" on page 51.

Manage Home Page

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



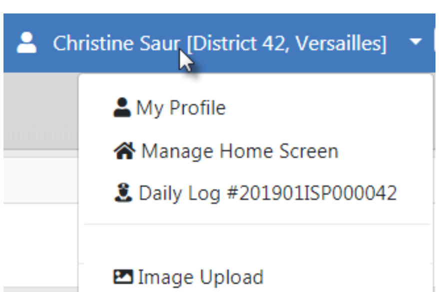
Click **Save** when you are finished making changes, click **Restore Defaults** to reset your changes back to the default settings, or click **Go Back** to return to the **Home Page**.

For more information on accessing the **Home Page** refer to "Home Page - Prior to RMS 11.12" on page 8.

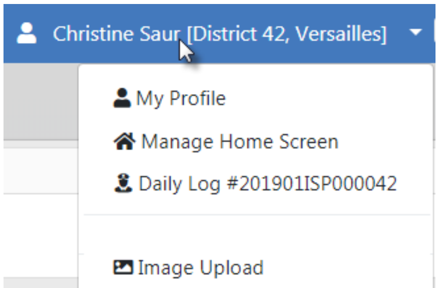
Daily Log

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

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



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

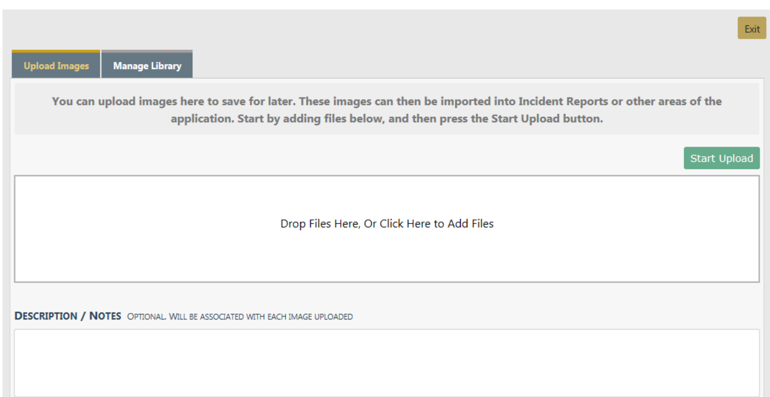


For more information on the Daily Log, refer to "Officer Daily Log" on page 539.

Image Upload

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

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

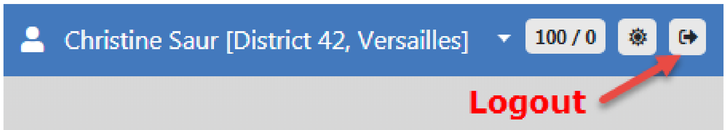


For more information on uploading images to your personal RMS Image Library, refer to "Image Library" on page 75.

Logout

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

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

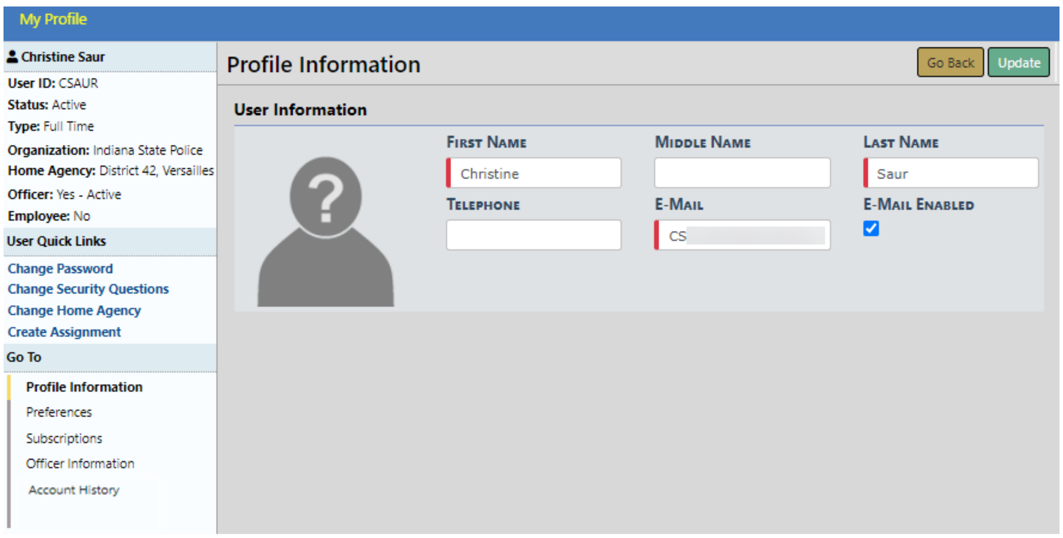


Once logged out, click the X on the upper right corner of the window to close.

Chapter 3. My Profile

My Profile Overview

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

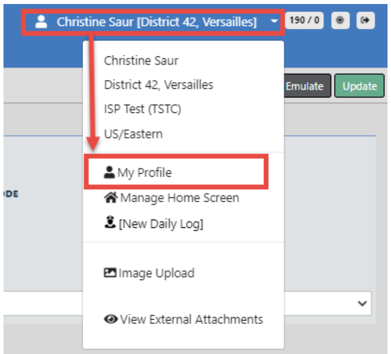


A photo of the person could also be shown, if available.

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

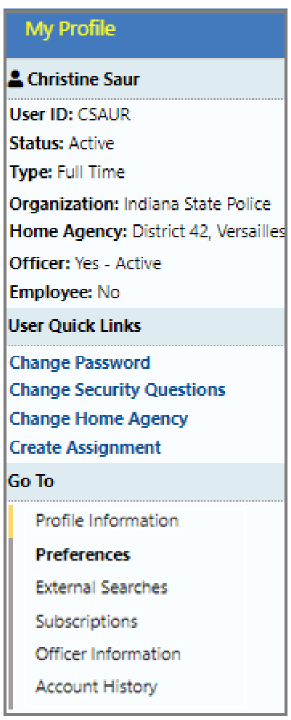
Access My Profile

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



My Profile Page Layout

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



User Information

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

This section is read-only.

User Quick Links

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

Change Password

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

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

Change Security Questions

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

Change Home Agency

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

Create Assignment

Use this link to create an assignment, if applicable.

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

Go To

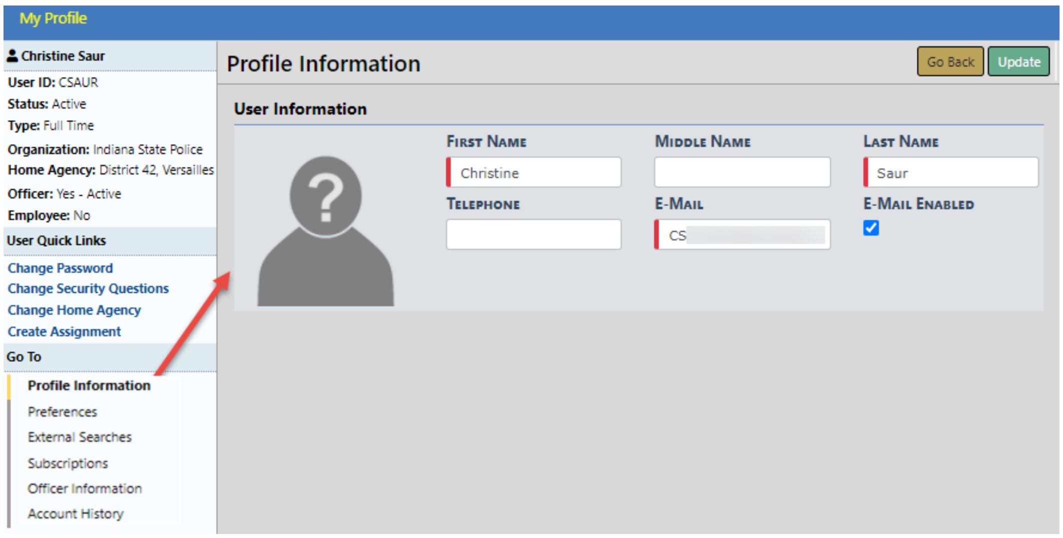
These are tabs to other user settings, such as profile information, preferences, external searches, subscriptions, officer information, and account history.

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

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

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

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



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

Refer to the following for tab details:

"Profile Information Tab" on the facing page

"Preferences Tab" on the facing page

"External Searches Tab" on page 57

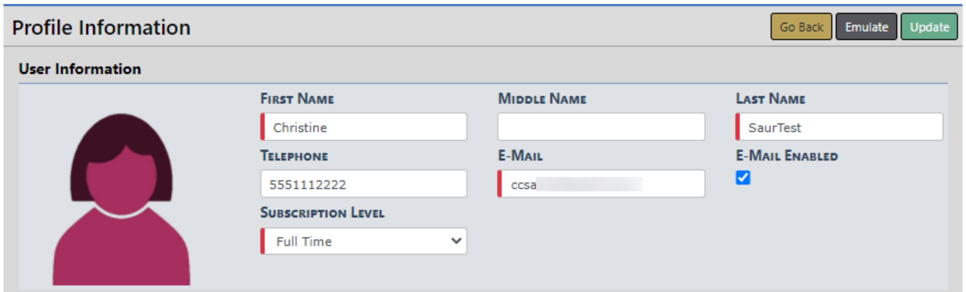
"Subscriptions Tab" on page 58

"Officer Information Tab" on page 59

"Account History Tab" on page 61

Profile Information Tab

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



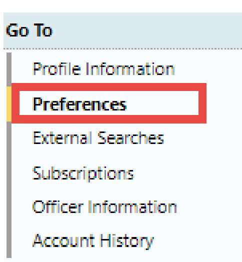
Make any necessary changes then click the **Update** button to save changes.

Preferences Tab

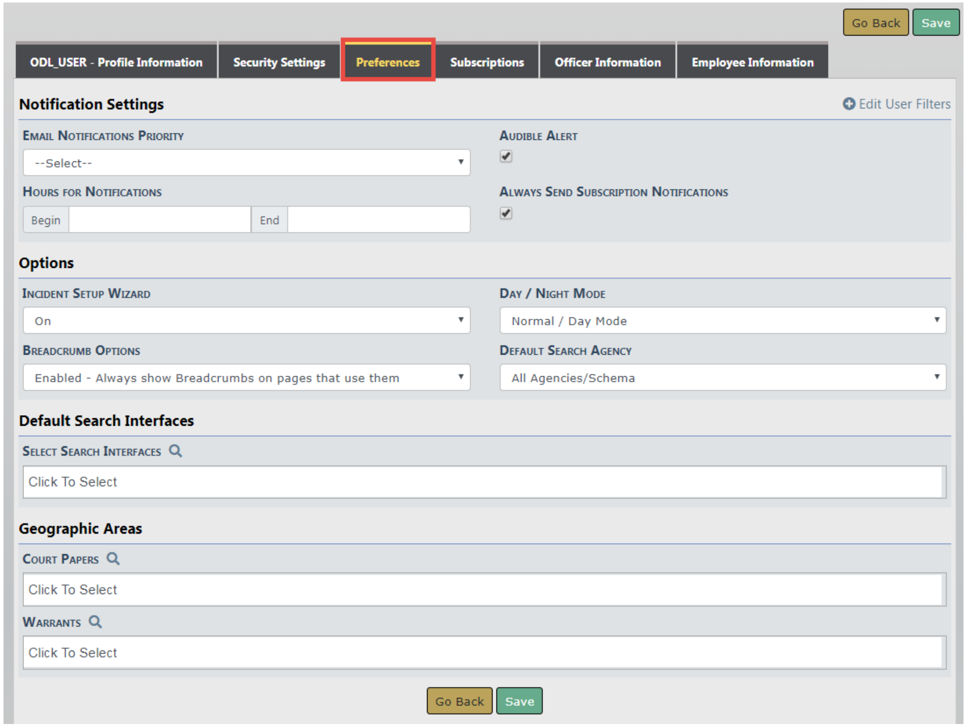
Use this tab to set notification preferences. You can enable or disable the audible alert, set email notification priority preferences, enable or disable Incident Setup Wizard, enable or disable Breadcrumb Options, set Day or Night Mode, set the Default Search Agency and Interfaces, identify Geographical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

You can update your preferences from *My Profile*.

1. Access *My Profile* page. For instructions, refer to "My Profile Overview" on page 51.
2. Click **Preferences** under the *Go To* section.



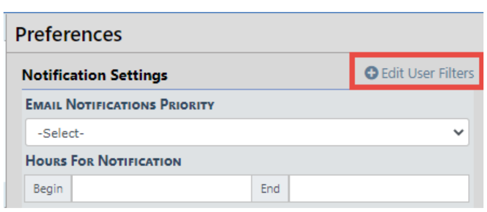
3. *Preferences* opens.

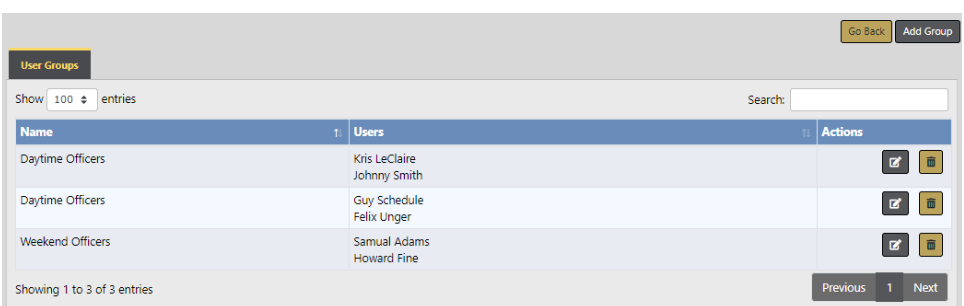


4. Complete the form as needed.

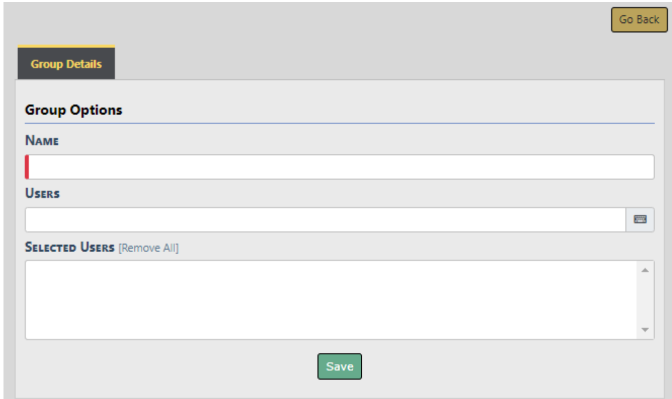
5. With proper permissions, you can optionally click the **Edit User Filters** link to include or exclude yourself in or from user groups.

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





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



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

b. Optionally, click on the edit icon  to edit an existing group .

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

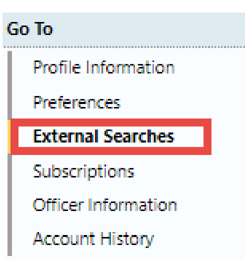
External Searches Tab

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

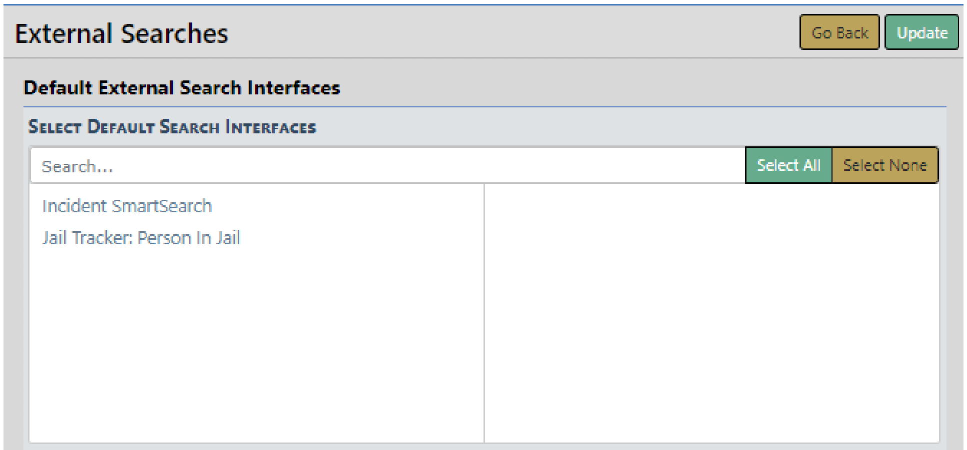
You can access your external searches from *My Profile*.

1. Access *My Profile* page. For instructions, refer to "My Profile Overview" on page 51.

2. Click **External Searches** under the *Go To* section.



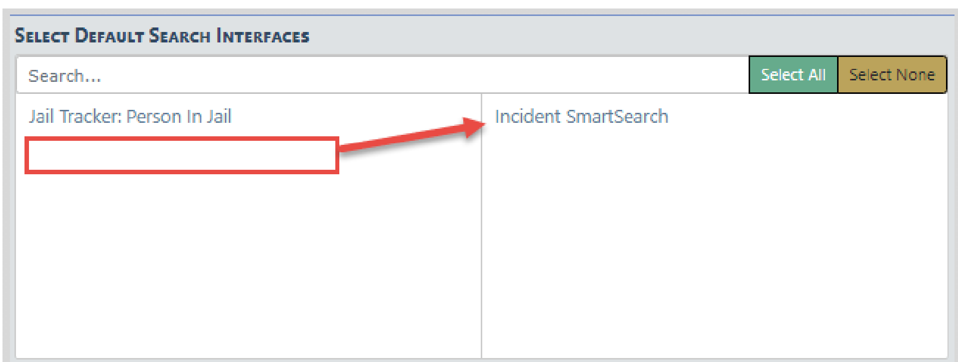
3. *External Searches* opens.



The available search interfaces appear on the left.

4. Two search interfaces are shown for illustration purposes. If many are listed, then you could **search** for a particular interface rather than page down to look through a long list.

5. Click on an interface in the list to **select**. The selected interface moves to the right side of the window.



Select as many available interfaces as you wish.

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

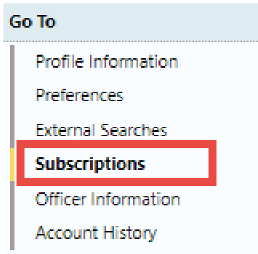
6. Click the **Update** button to save.

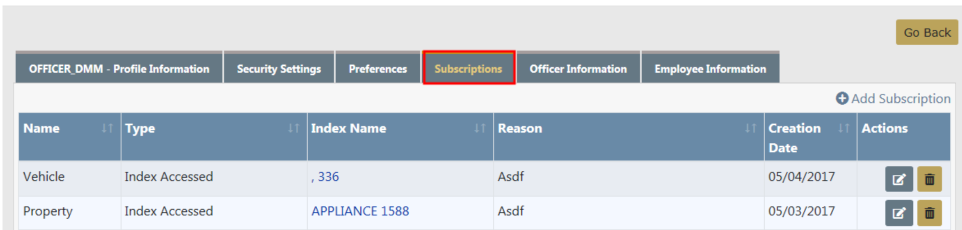
Subscriptions Tab

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

1. Access *My Profile* page. For instructions, refer to "My Profile Overview" on page 51.

2. Click **Subscriptions** under the *Go To* section.





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

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

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

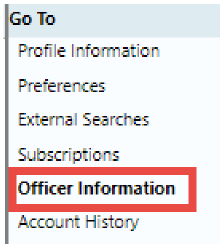
For example, you can **Subscribe** to Williams Jones' master person record to receive notification when someone updates information on his master person record.

For more information on creating a **Subscription**, refer to "Subscribe to Master Records" on page 134.

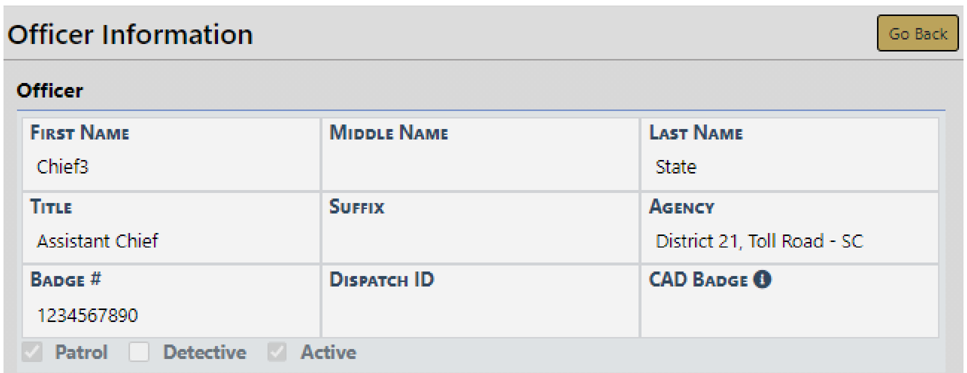
Officer Information Tab

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

1. Access *My Profile* page. For instructions, refer to "My Profile Overview" on page 51.
2. Click **Officer Information** under the *Go To* section.

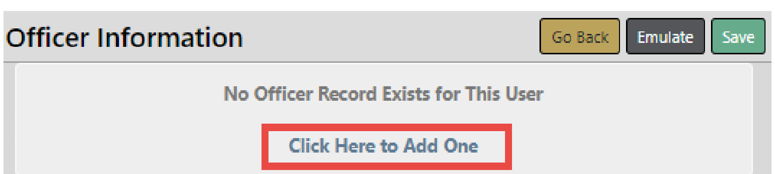


3. *Officer Information* opens.



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

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



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

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

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

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

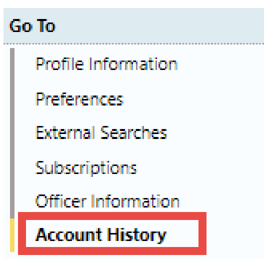
5. Click the **Update** button on the top right of the form to save.

Account History Tab

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

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

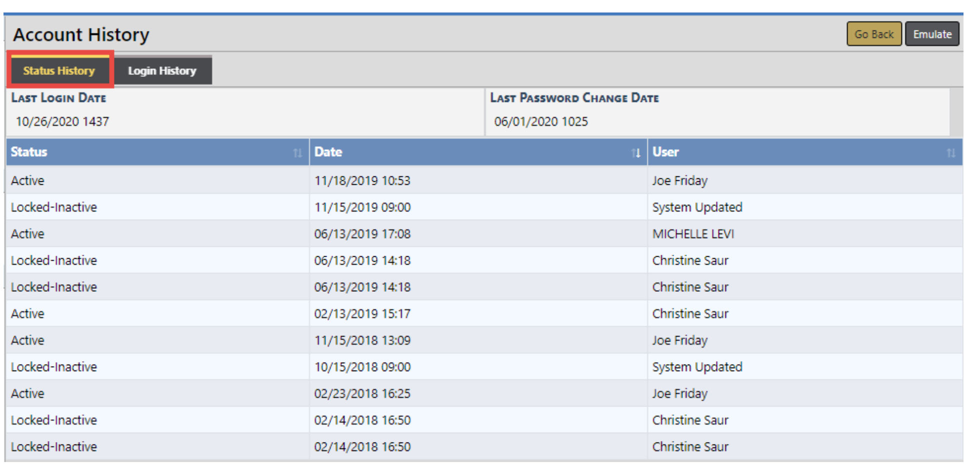
1. Access *My Profile* page. For instructions, refer to "My Profile Overview" on page 51.
2. Click **Account History** under the *Go To* section.



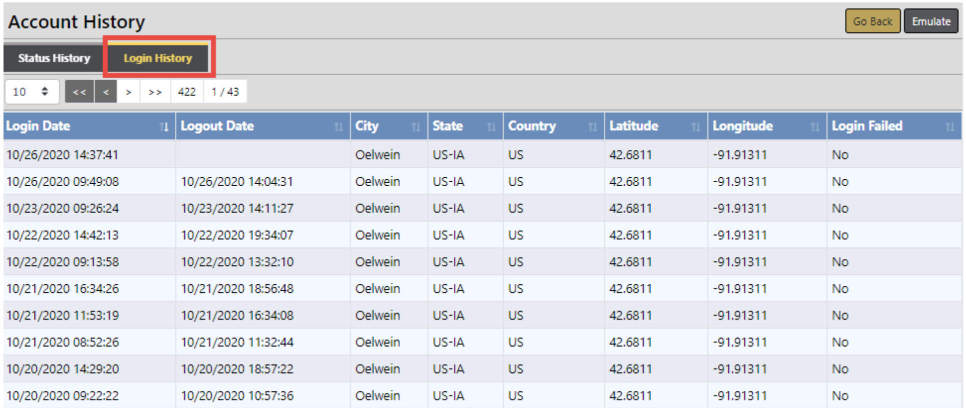
3. *Account History* opens as read-only.

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

   The *Status History* tab opens by default.



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



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

Chapter 4. Submit Ticket

Submit Ticket Overview

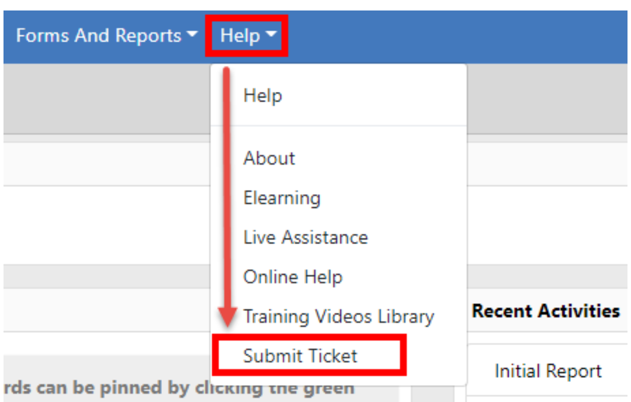
All users can submit a support ticket to our Support Team 24 hours a day from within Online RMS. How you submit a ticket depends on your permissions and agency setup:

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

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

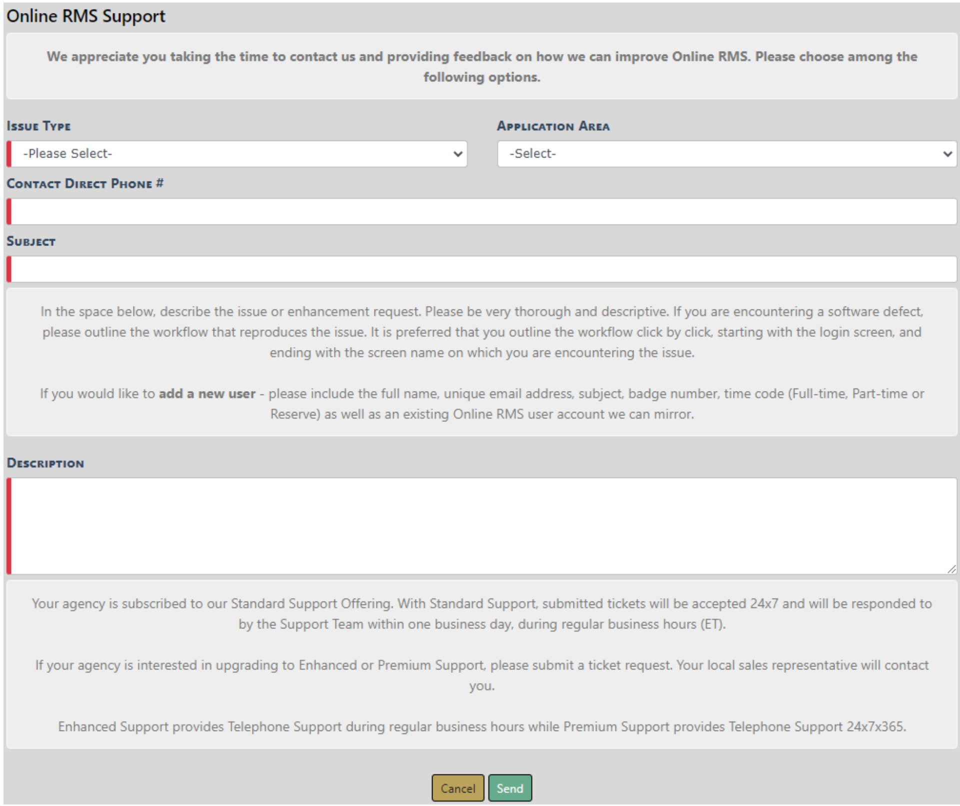
How To Submit a Ticket

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



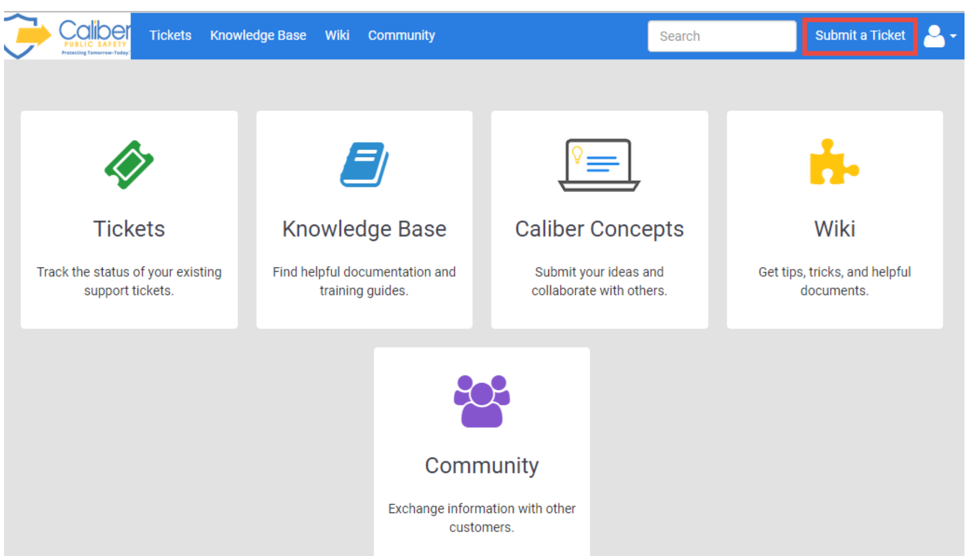
2. Follow one of the options below:

   a. If your account is not configured to log into the Team Support website automatically, a pop-up *Online RMS Support* window opens.



- Complete the form then click **Send**.

b. If your account is configured to log you into the Team Support website automatically, Team Support opens in a separate window.



- Click **Submit a Ticket** and follow the Team Support ticket procedure.

- **Sign Out** and close the window when finished.

Chapter 5. Custom Forms

Custom Forms Overview

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

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

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

For more information on **Community Reporting**, or public forms, refer to “Community Reporting” on page 303.

There are two ways to take action on submitted forms:

- From a Notification.
- From your Recent Activities.

For more information on taking action, refer to“Taking Action on Submitted Forms” on page 304.

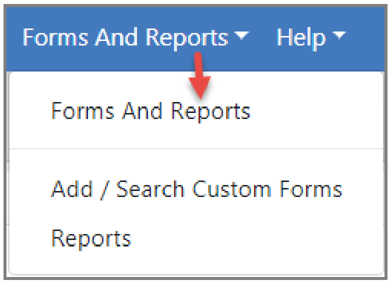
The same method is used for searching and viewing public and non-public Custom Forms. For more information, refer to “Search For and View Custom Forms” on page 65.

Search For and View Custom Forms

To search for and view Custom Forms follow these steps:

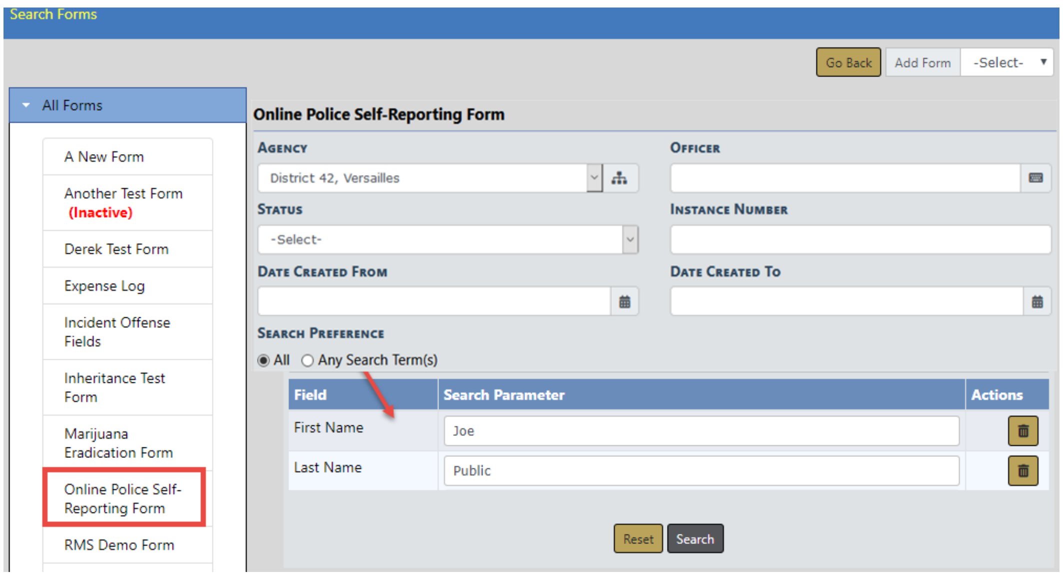
> **Note:** Searching for and viewing a publicly available custom form is the same as searching for a non-publicly available custom form.

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

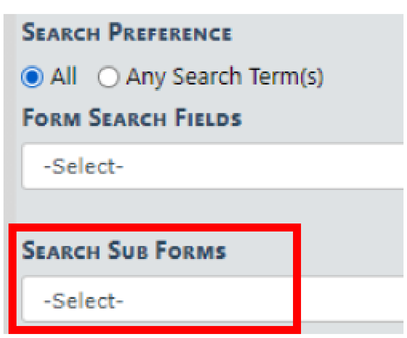


2. Click on the **Add/Search Custom Forms** option.

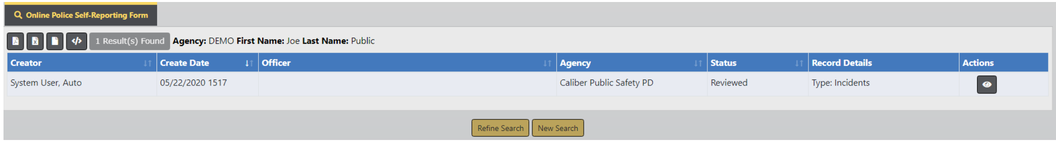
3. Enter the search criteria using the fields provided. Click into the **Form Search Fields** to select Custom Form fields, and repeat to select multiple fields as shown below.



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



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



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

6. Click the **Print Form** button to select print options, then click **Print** to open the form in a new tab in your browser. You can then download to a file or print directly to the printer.

7. With appropriate permissions, you can click the **Change Status** button to open the form for edit. Once opened, the creator of the form will have access to edit the form.

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

If you receive a *Form Review Notification*, refer to "Taking Action via Notifications" on page 304 or "Taking Action via Recent Activities" on page 312 for more information. Refer to "Notifications" on page 25 for more information on Notifications.

Chapter 6. Attachments

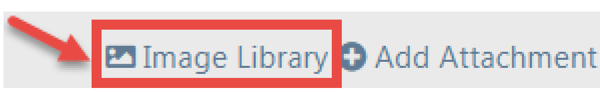
Attachments Overview

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

Attachments appear in a grid, or columnar format.

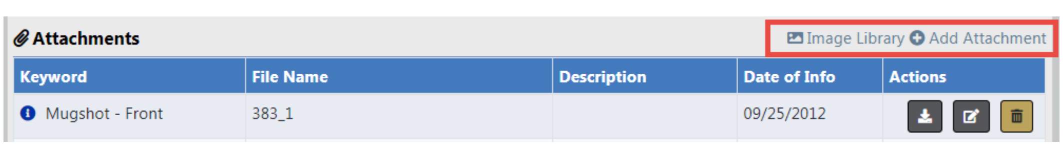
You can edit and delete attachments that were created by you. Users with administrator privileges have the ability to edit and delete attachments for any user.

Click on the **Image Library** link to access your personal RMS image library that contains images uploaded by you from a mobile device, or other devices. For more information, refer to "Image Library" on page 75.



Add Attachments

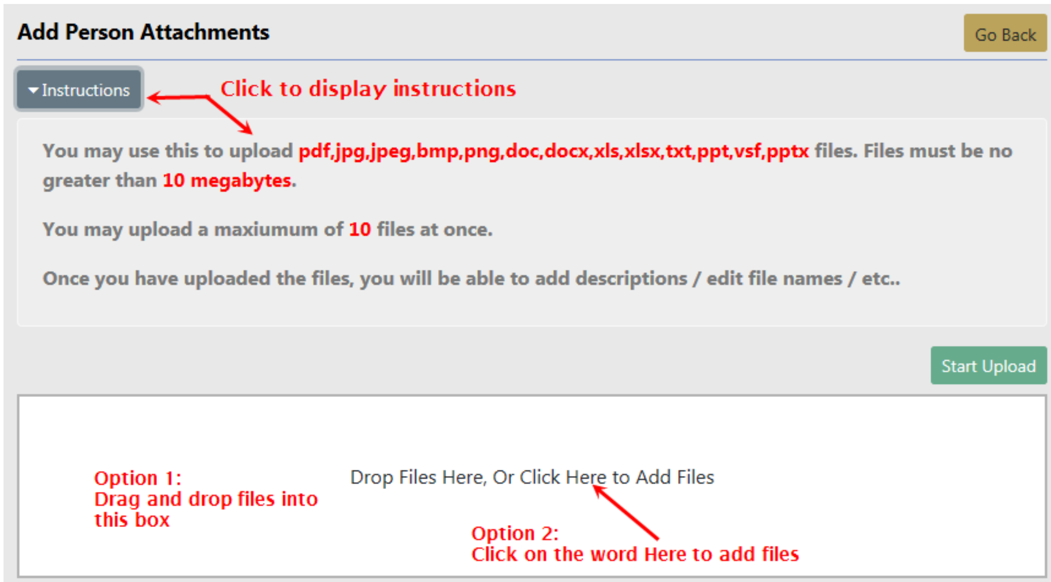
Several Online RMS modules support **Attachments**. Access the module and record that contains the **Attachment** you need to add. For example, to add an Attachment tied to a person, go to that person record and page down to the **Attachment** section, then follow the directions below.



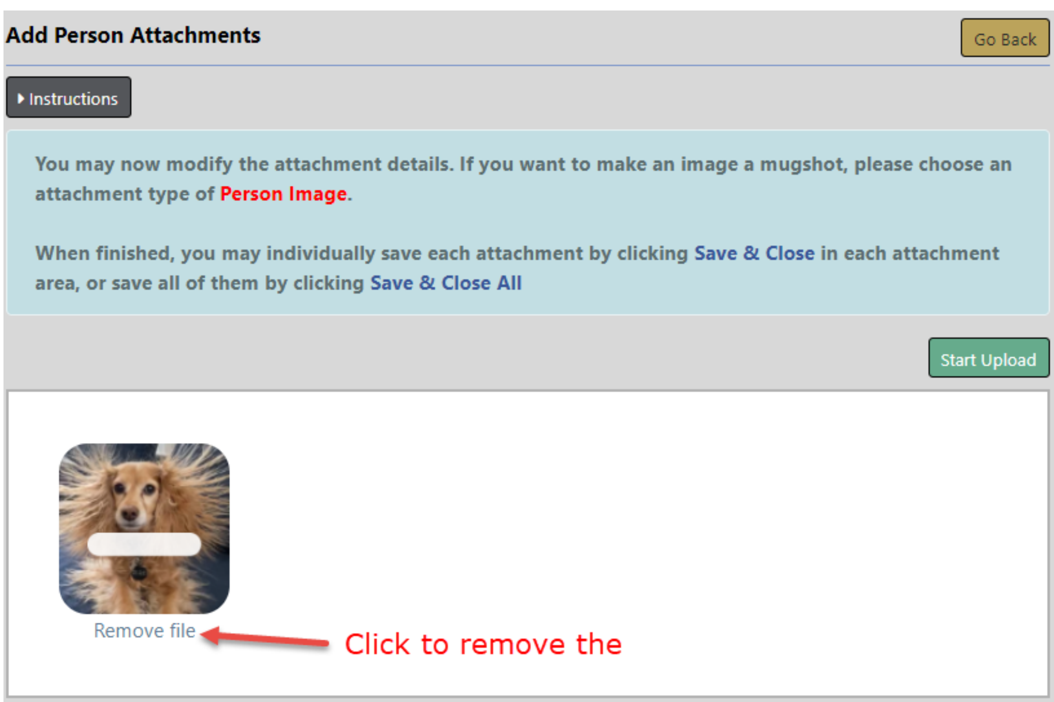
1. Click on the **Add Attachment** link to begin the upload process.

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

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

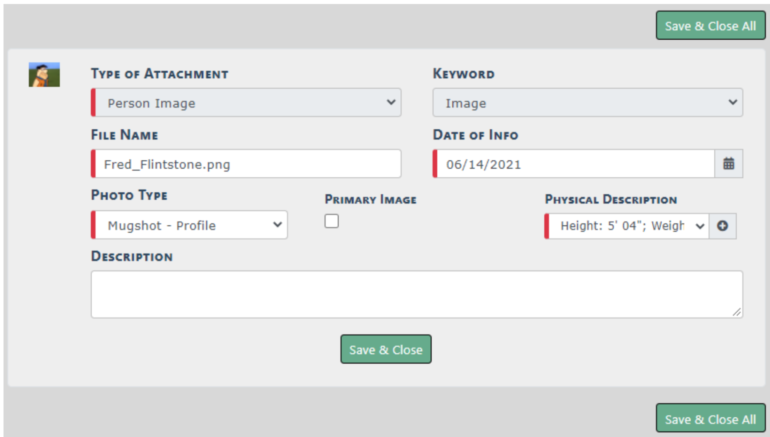


b. When all the files are in the **Queue**, click **Start Upload** button to add the attachments. Click on **Remove File** to remove from the Queue.



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

c. Modify the attachment details when the following dialog window appears. The content of this window can vary.



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

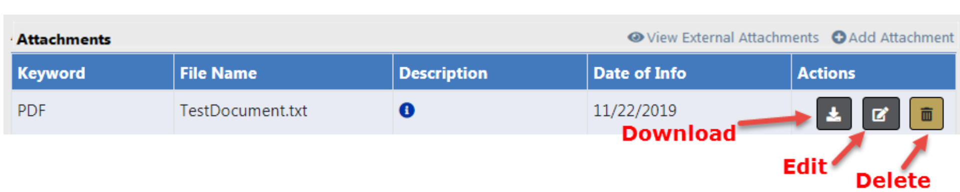
e. The attachments then appear in the **Attachments** grid. You can view additional information, download, edit, or delete the attachment.

Note: Up to ten (10) items or a maximum of 10 megabytes of data can be uploaded at one time.

Edit Attachments

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

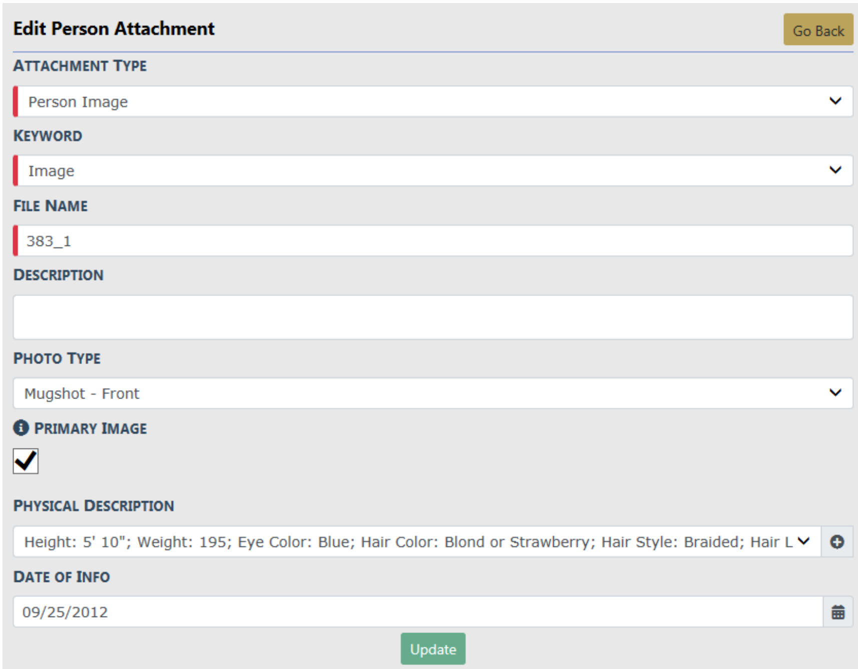
1. Click the edit icon on the record you need to update.



Note: You cannot update attachments created by another user.

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

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

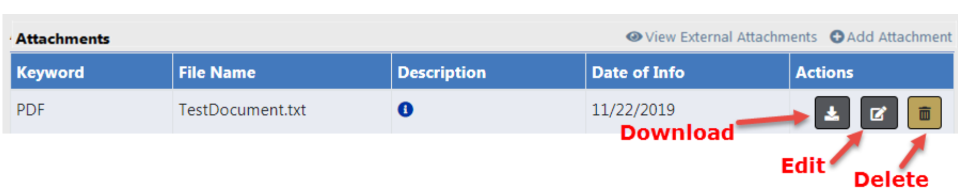


3. Click **Update** to update the record, or click **Go Back** to return to the previous window without saving.

Delete Attachments

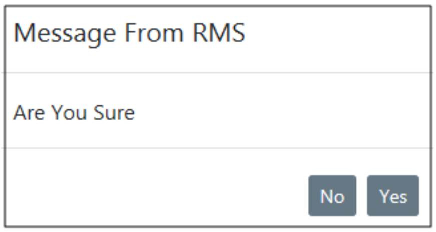
Several Online RMS modules support **Attachments**. Access the module and record that contains the **Attachment** you need to delete. For example, to delete an **Attachment** tied to a person, go to that record and page down to the **Attachment** section, then follow the directions below.

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



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

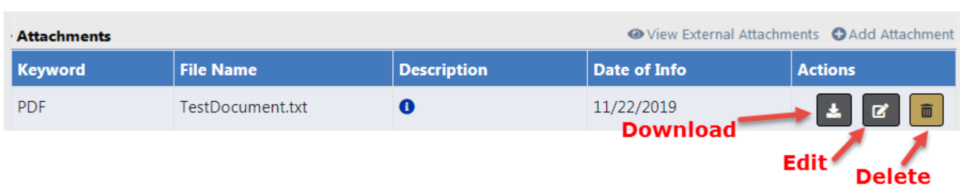
2. A confirmation window appears. Click **Yes** to delete or **No** to return to the previous window without deleting.



Download Attachments

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

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



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

Chapter 7. Image Library

Image Library Overview

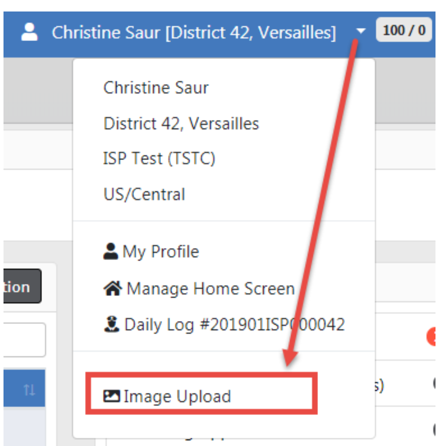
The **Image Library** is a personal RMS image library that contains images uploaded by you from a mobile device or other devices. Only your user account has access to these personal images.

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

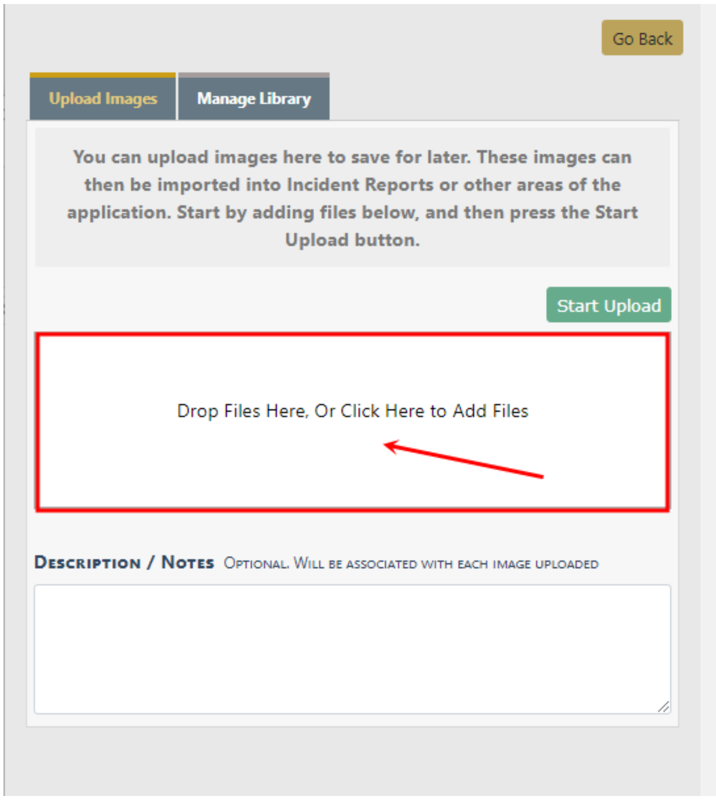
Upload Image

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

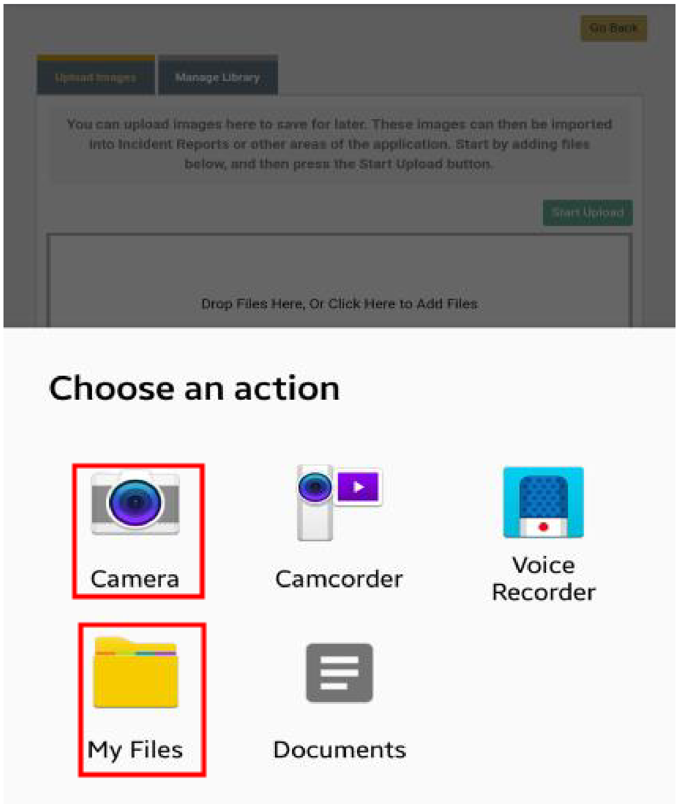
1. Click the down arrow next to your user name on the top right of the window, then click **Image Upload**.



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

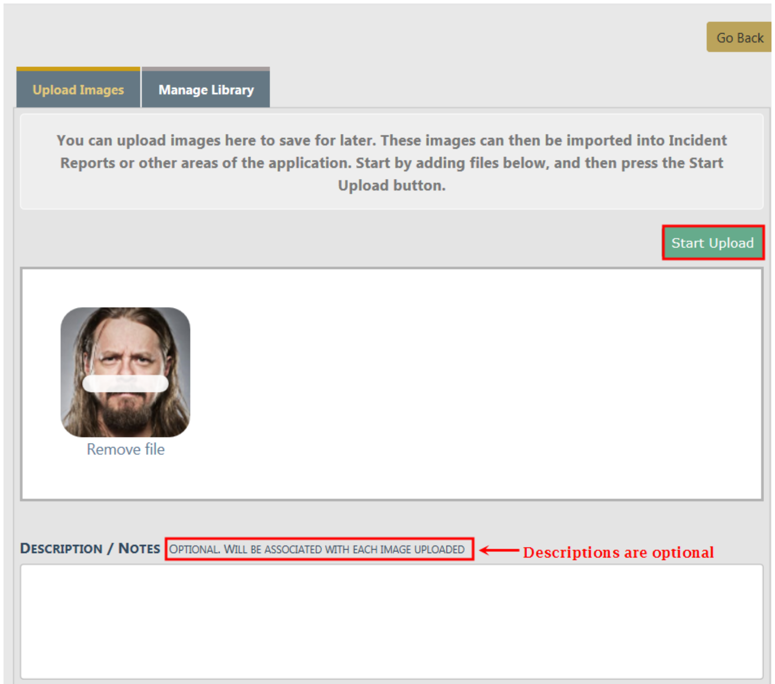


a. If uploading from your *mobile device*, select **Camera** to take a photo and upload directly from the camera on your mobile device, or select **My Files** (or local folder) to upload from device storage.



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

3. Click **Start Upload**.



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

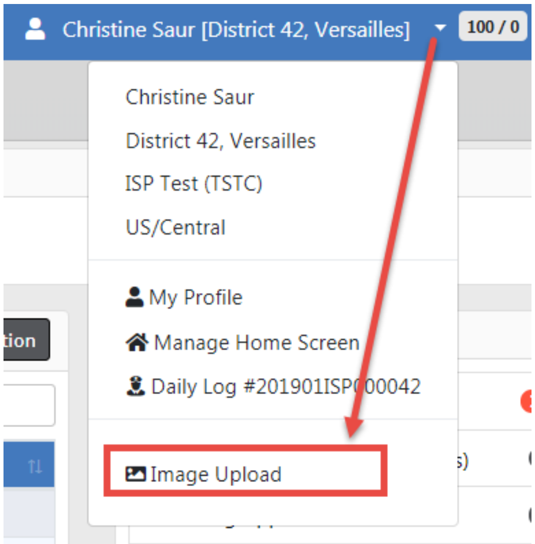
You can delete or download images that exist in your Image Library. For more information, refer to "Manage Library " below.

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

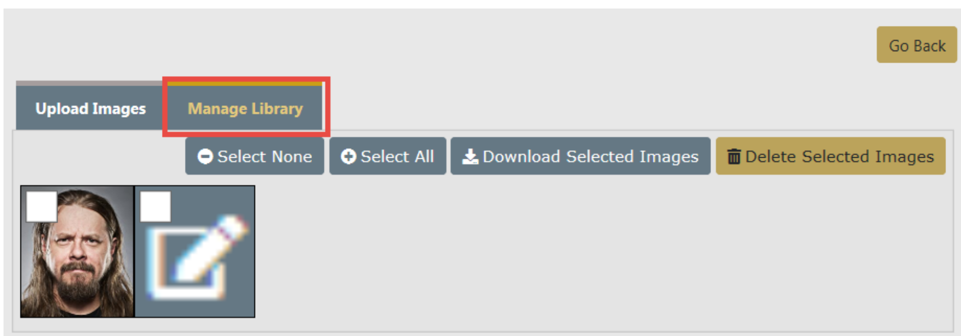
Manage Library

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

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

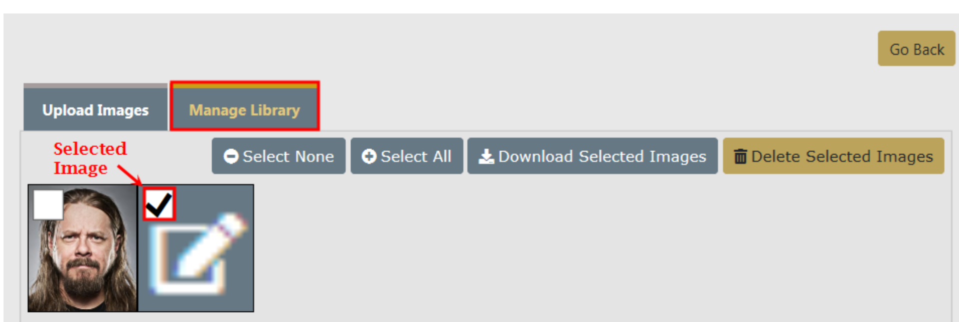


2. Click on the **Manage Library** tab to access your uploaded image files.

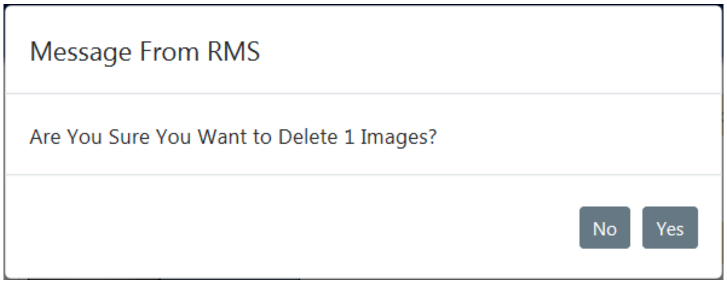


Delete Image Files

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



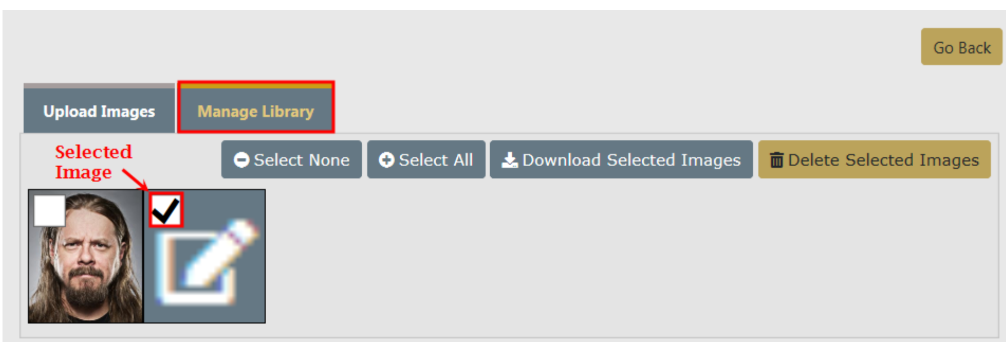
2. Click the **Delete Selected Images** button, then click **Yes** to confirm.



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

Download Image Files

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

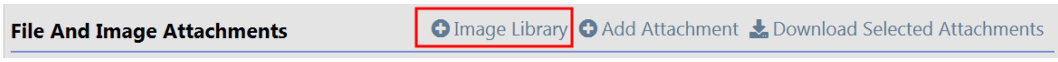


2. Click the **Download Selected Images** button, then click **Open** or **Save** the files.

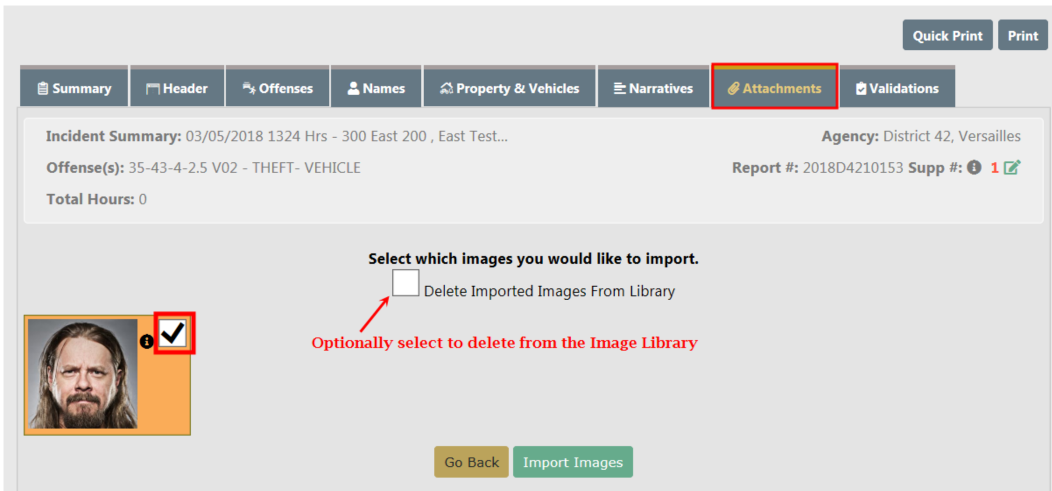
Import Images From Library

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

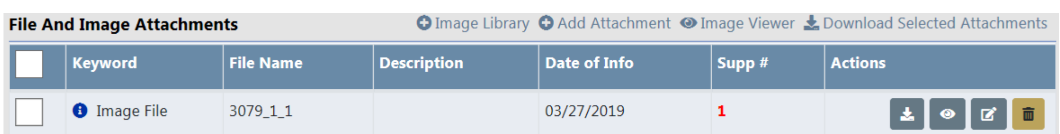
1. Click on the **Image Library** link under *File and Image Attachments* section. Incidents is used in this example; however, the same general process applies to field arrests and persons.



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



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



Chapter 8. Master Indices

Master Indices Overview

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

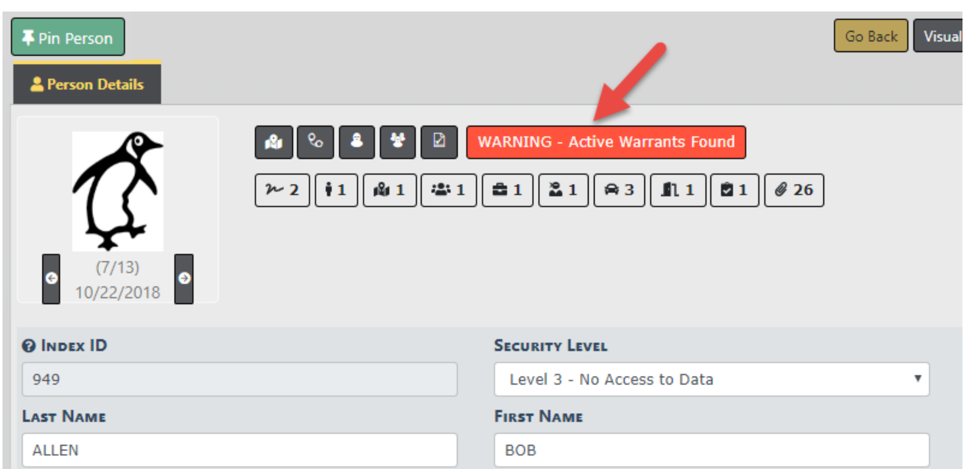
The following are considered **Master Indices**:

- Person

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

  Note: If configured for your agency, you can take photos directly from the Online RMS Field Arrest or Master Person Index record using the **Hunter Camera** integration software installed on your local machine. The software associates the images with the *Master Person Index* record. For more information on the camera software, refer to “Hunter Camera” on page 844.

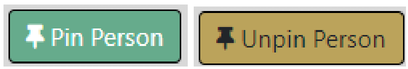
  When a person is associated with an active warrant, an automatic Caution Flag appears on the master person index record:



  For more information on active warrants, refer to "Activate Warrant" on page 606.

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

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



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

For more information on pinned records that appear on the Home Page, refer to "Home Page - Prior to RMS 11.12" on page 8.

- Address

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

- Organization

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

- Vehicle

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

- Property

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

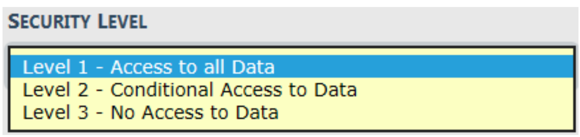
- Gang

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

Master Index Security

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

Master Indices Security Levels



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

User Account Index Security Levels

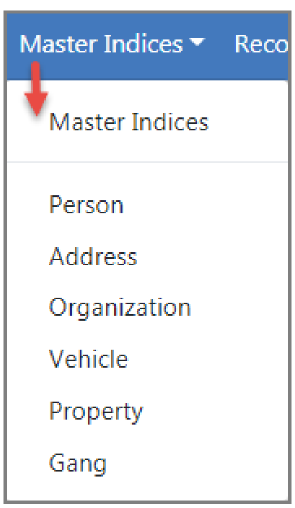
- **Level 1**
  - View full details of master index records having **Security Level 1**.
  - Only view the indices demographic information for master indices records having **Security Level 2**.
  - And, Not see master indices records that have **Security Level 3**.

- The default level for all new user accounts.

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

Accessing Master Indices

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



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

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

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

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

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

Searching Master Records

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

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

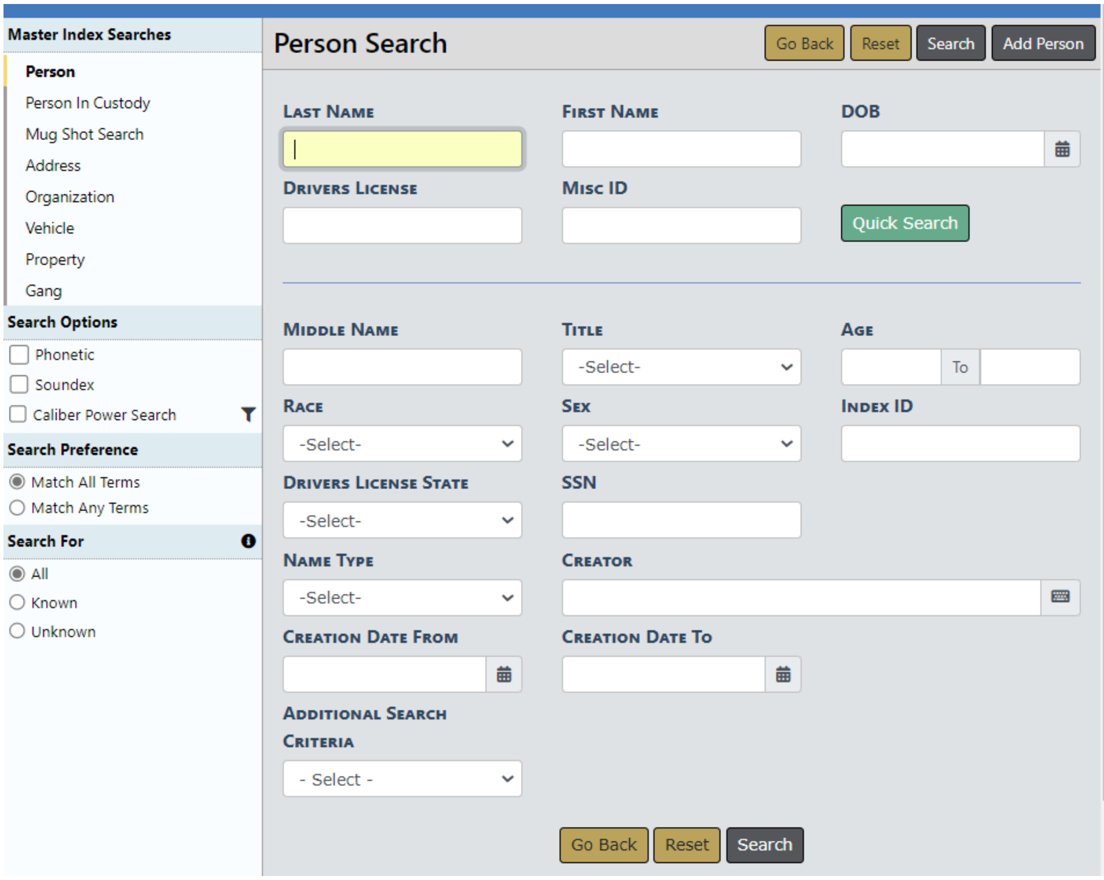
Master Indices are accessible, with appropriate permissions, by selecting the **Master Indices** button on the top navigation bar. For more information on accessing the **Master Indices** button, refer to "Accessing Master Indices" on page 86 .

A *Search* window appears when you click on any one the of menu items. Each menu item calls up a *Search* window with left-hand menu links. Choosing Master Indices or Person takes you to the Person screen of the *Search* window, choosing Address takes you to the Address screen, choosing Vehicle takes you to the Vehicle screen, etc.

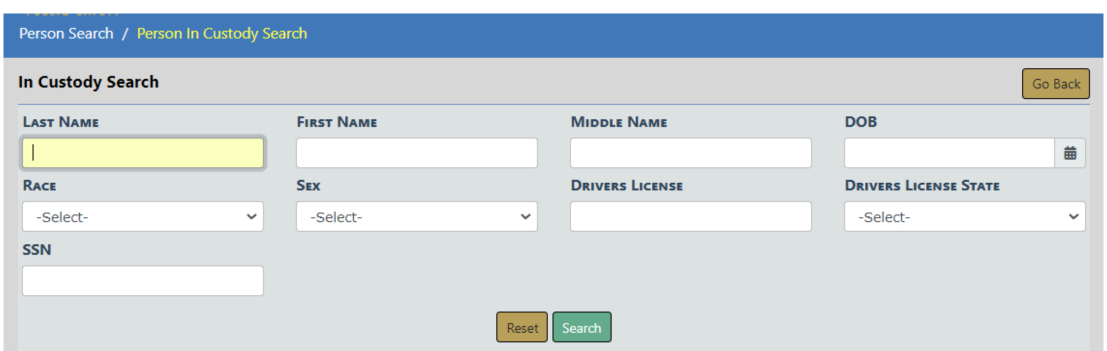
> **Note**: Person and Address search instructions are provided, though the same general process is also used when searching for Organization, Vehicle, Property, and Gang.

Person Search

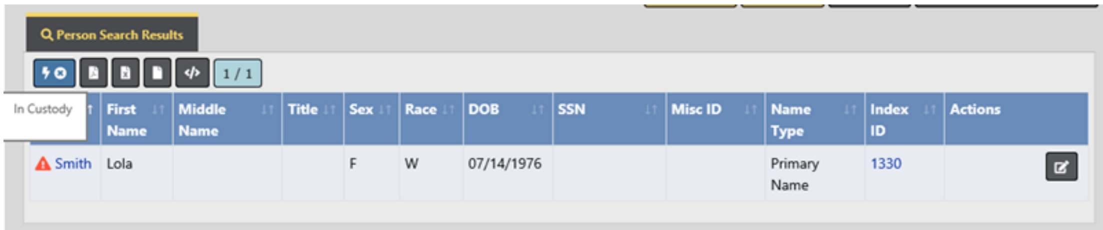
A search can be done with full or partial text in any of the fields provided. You may also choose to filter results to include **Known**, **Unknown**, or **All** (both Known and Unknown) persons. Searching with less information yields more results. If too many results display, you can click on the **Refine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

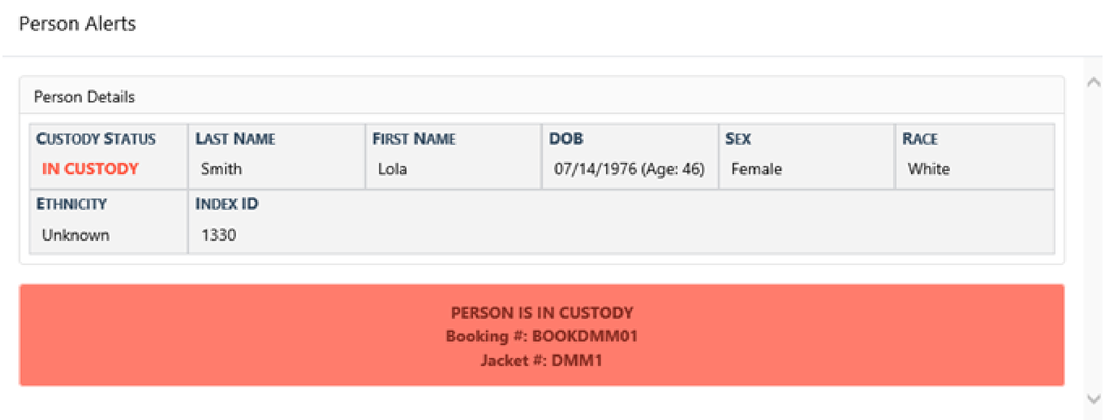


Click the **Person in Custody** link to search for persons who are in custody. (This link will only be visible if custody records are synced to RMS.)



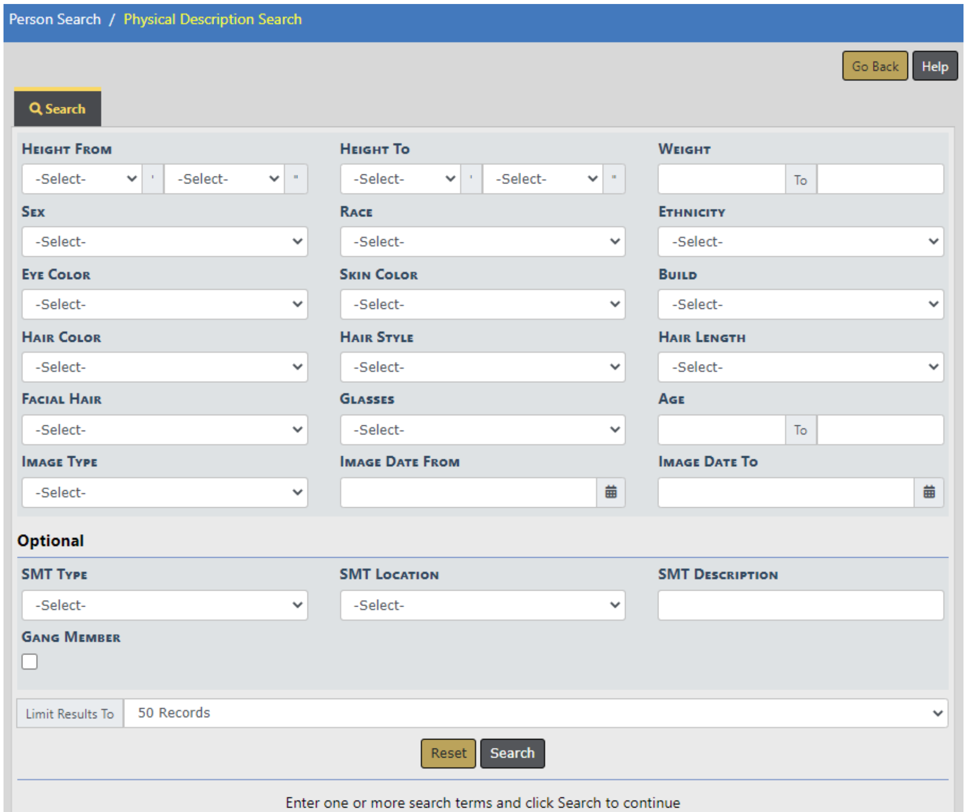
When custody records are synced to RMS and a person search returns a person who is in custody, an alert dialog will display. In-custody results allow you to edit the person (if there is a master person record) or create a master person record for the in-custody person if no such record exists.





Search Mug Shots By Physical Description

Optionally, click the **Mug Shot Search** link to display the *Physical Description Search* window.

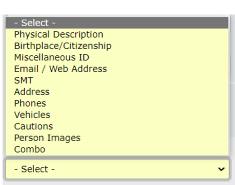


Enter or select one or more search criteria, then click **Search** to display a mug shot photos that match your search criteria.

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

Additional Search Criteria

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



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

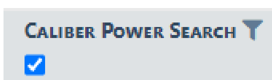
Note: Choose **Person Images** to search images by photo type (mugshots, etc.) and by date range.

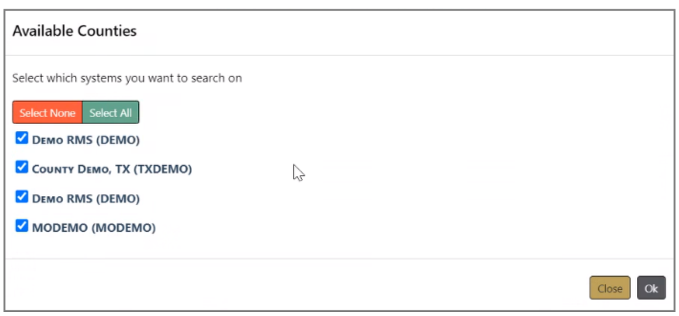
Note: Choose Combo to search by a combination of fields such as, physical description, miscellaneous IDs, address, phone, vehicle, caution codes, and person images.

Power Search

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

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

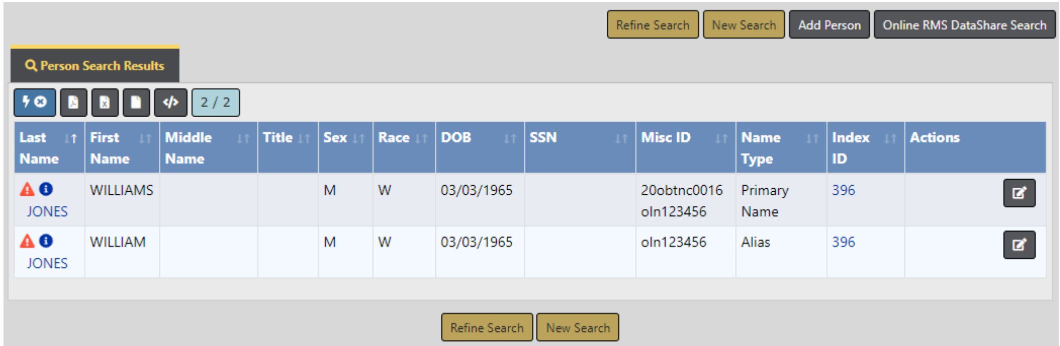




The list of available counties varies by agency.

Search Results

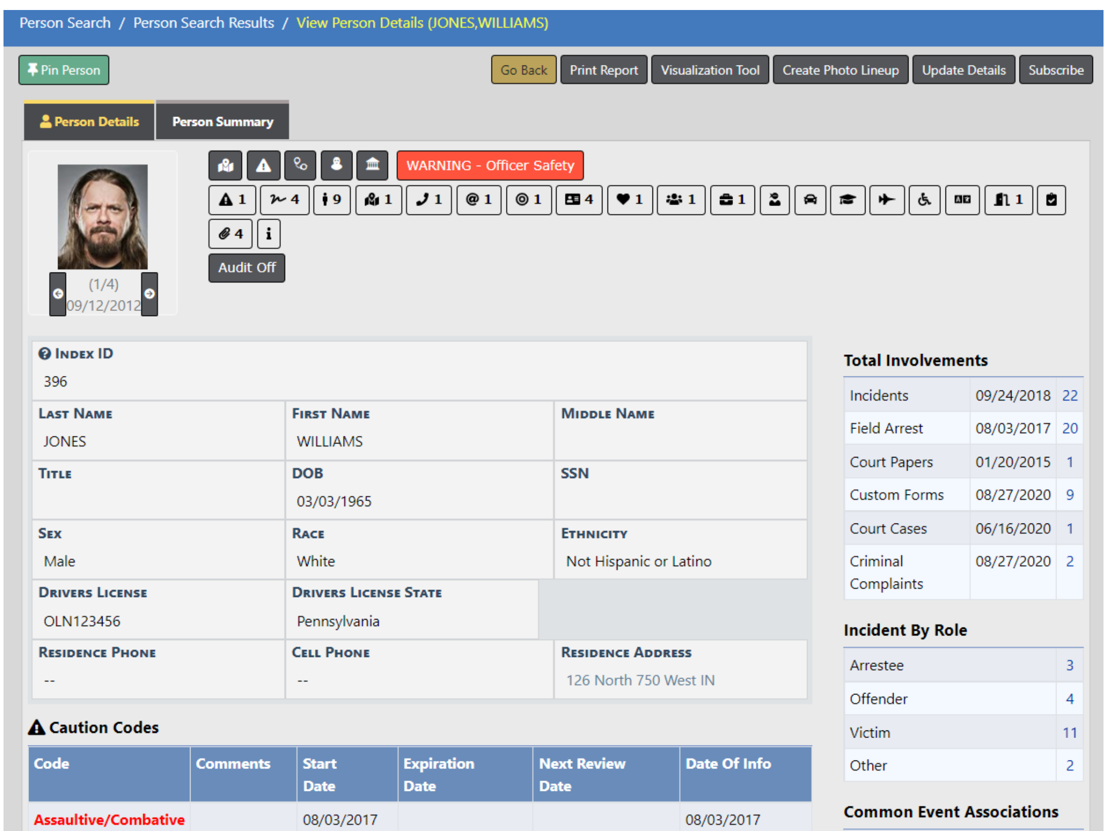
Every master record will be assigned an Index ID number by Online RMS when it is created. Click on the **Index ID** or the **Last Name** in the *Search Results* window to open the *View Person Details* window to view a specific record. Select the edit icon on the *Search Results* page to update a record.

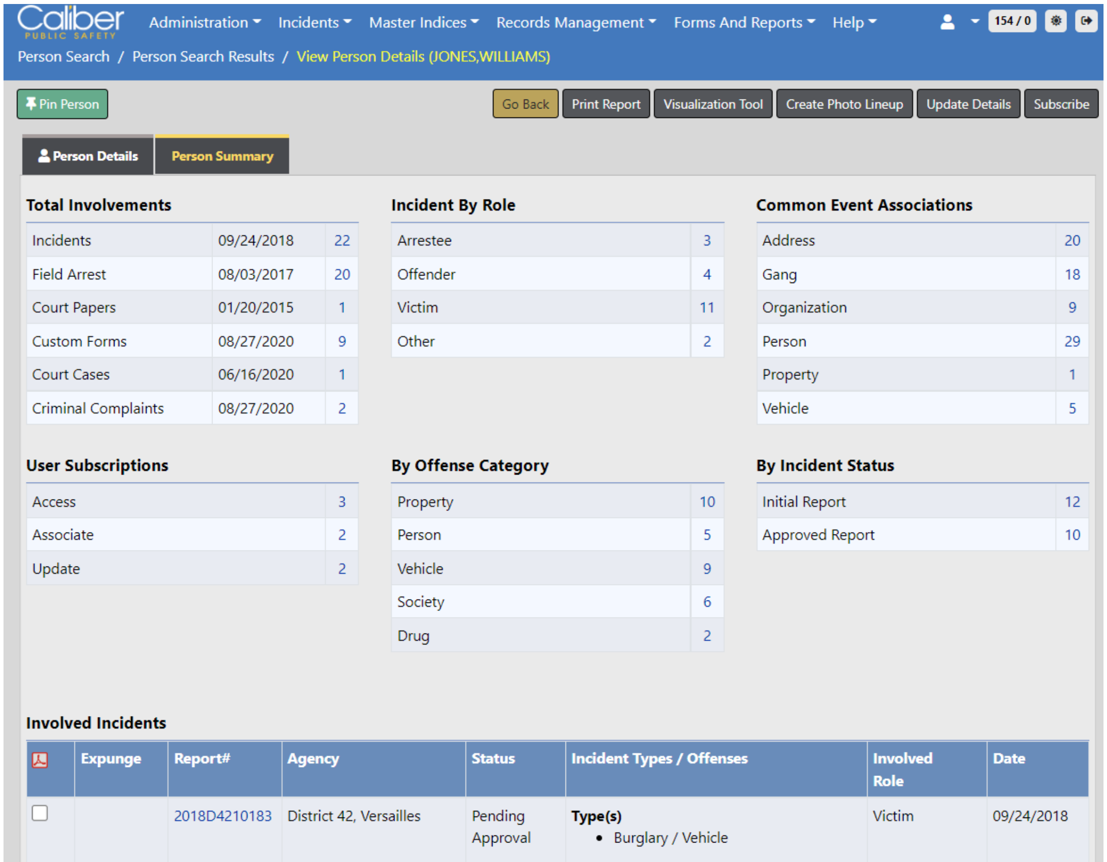


View Person Details

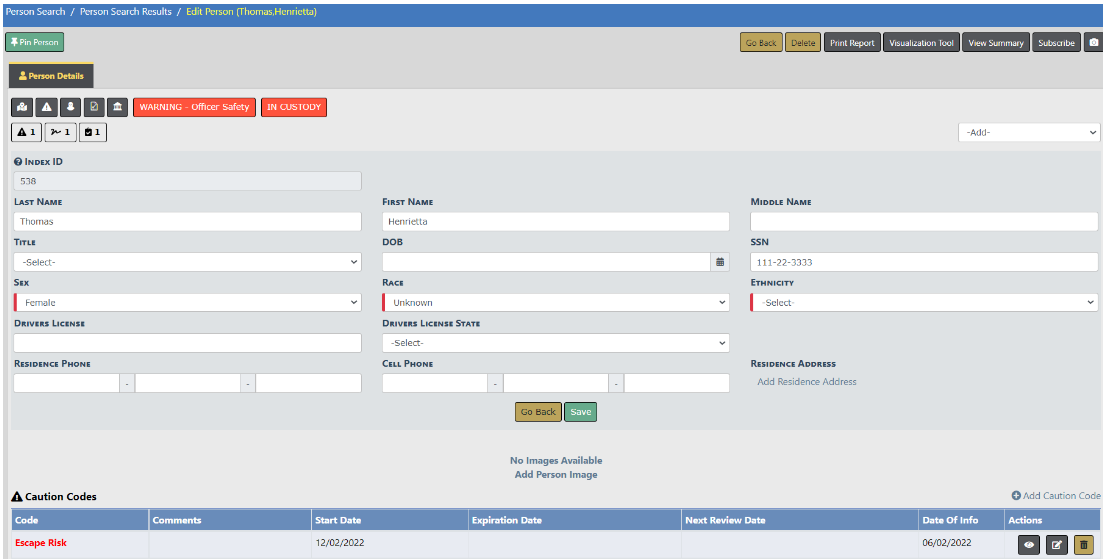
View Person Details contains two tabs with additional information about that index record, and on the right side of the screen is a summary of all associations to the master index record. Next to each association is a total count hyperlink. Click on the total count hyperlink to go directly to that list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

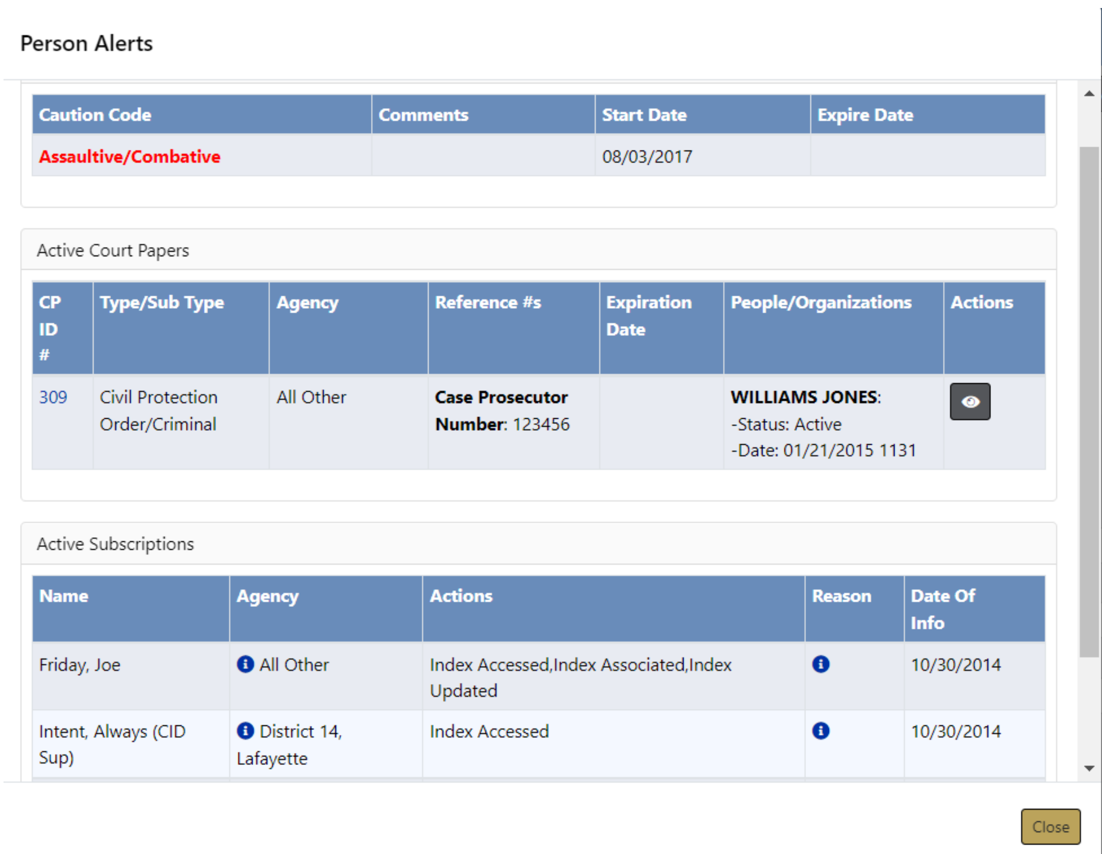
Note: Select the **Update Details** button on the top right to switch to Update mode.





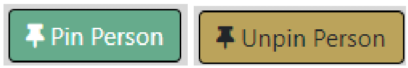
If the person searched has an active warrant, court paper, caution code, or permit the **Warnings / Alerts** icon (formerly **Officer Safety**) will appear, and if the person is a juvenile, the juvenile offender icon will appear. If your system is integrated with jail tracking, in custody flags will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





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

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



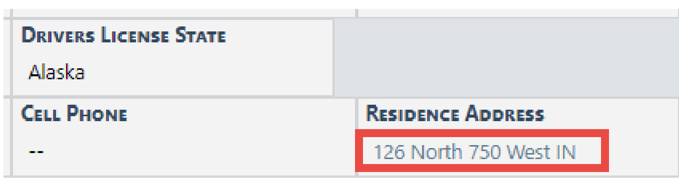
To *unpin*, click on the gold **Unpin Person** button.

For more information on pinned records that appear on the Home Page, refer to "Home Page - Prior to RMS 11.12" on page 8.

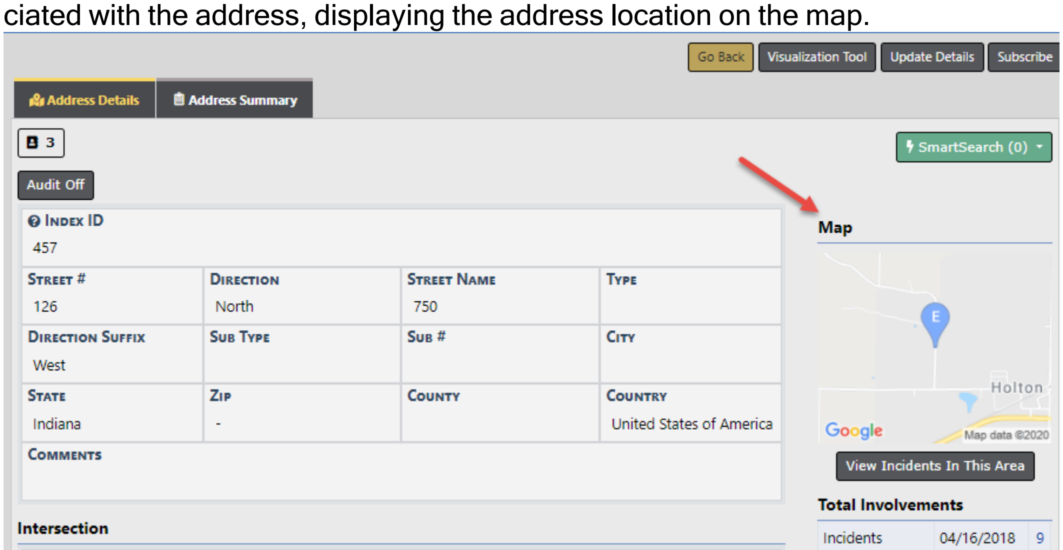
Master Index Associations

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

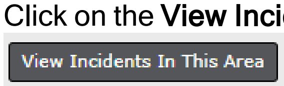
Click on the **Residence Address** link to access the address record.



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



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

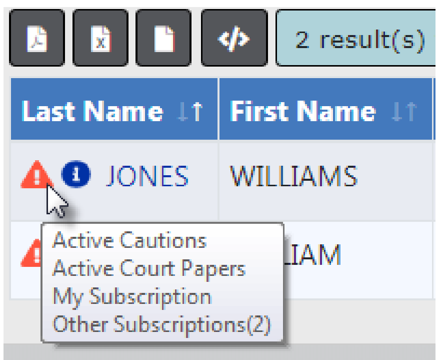


Click on the **Print Report** button to print the master person record. For details, refer to "Print Master Person Records" on page 131.

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

Person Active Alerts

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



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

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

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

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

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

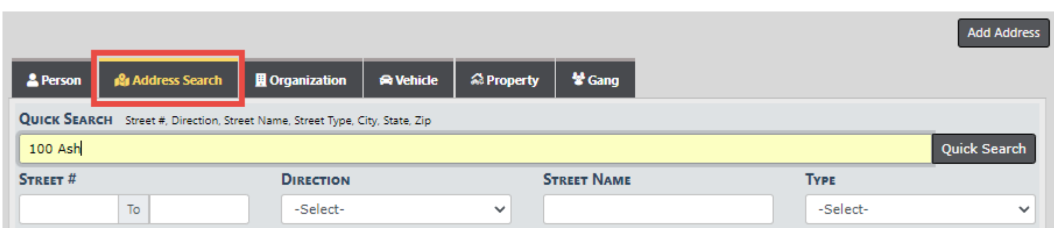
View Mobile Person Results in Online RMS

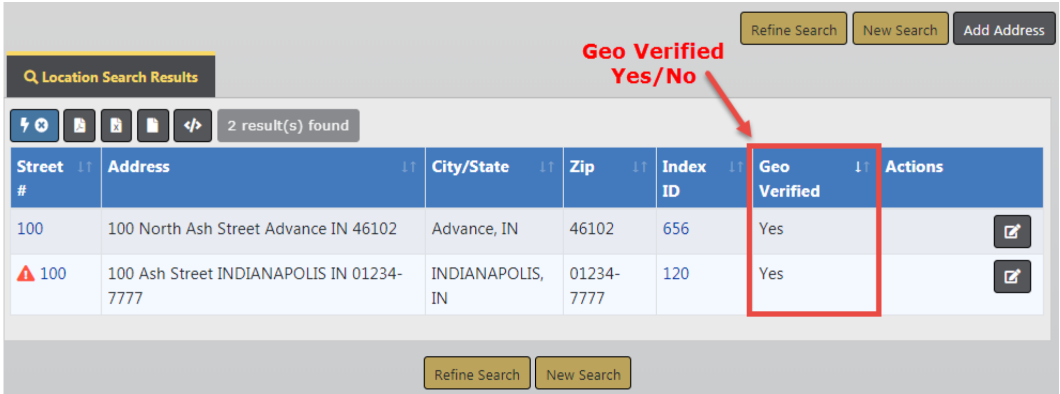
For agencies using both *Caliber Mobile* and *Online RMS*, person results that exist in *Caliber Mobile* within the last 24 hours are accessible on the Master Index Search page in *Online RMS* by a **Mobile Results Available** link prefixed by the number of results found.

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

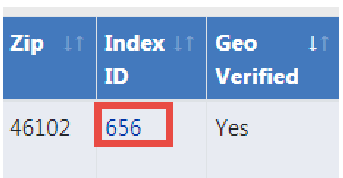
Address Search

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

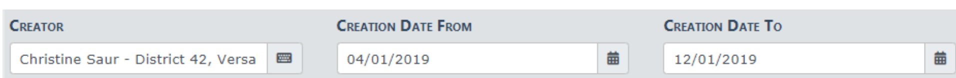




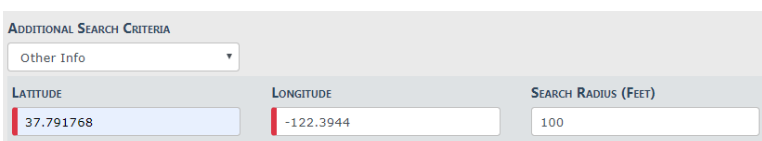
In the results list, click on an Index ID link to quickly view address details.



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



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



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

For instructions on adding an address to the Master Index, refer to "Adding Address" on page 109.

Adding Master Index Records

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

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

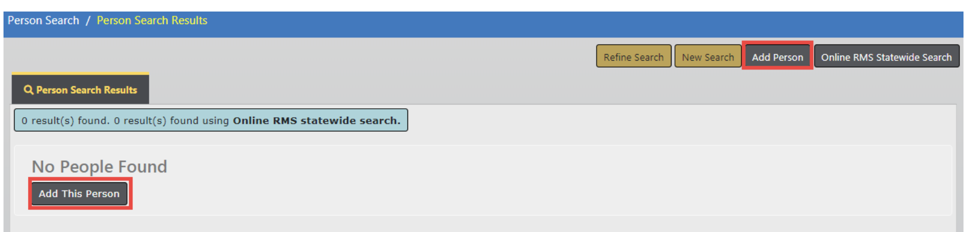
For details on accessing the Master Indices, refer to "Accessing Master Indices" on page 86.

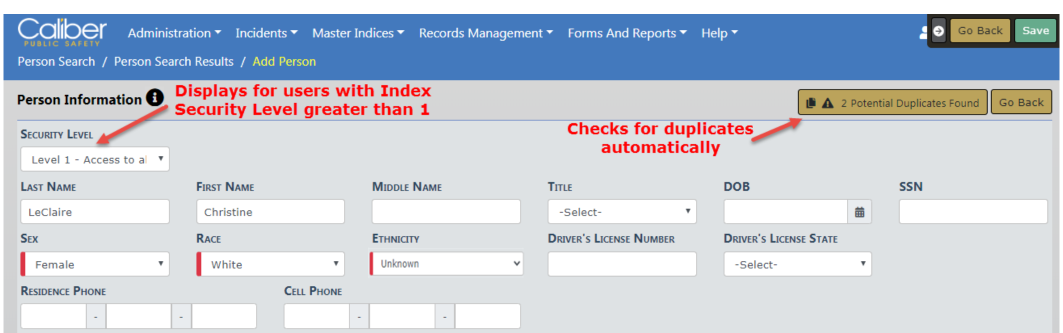
For details on searching for Master Index records, refer to "Searching Master Records" on page 87.

Adding Person

After searching for a Master Person record, the *Person Search Results* screen either displays a list of names that match your search criteria, or it indicates no records are found. For more information about searching Master Indices refer to "Searching Master Records" on page 87.

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





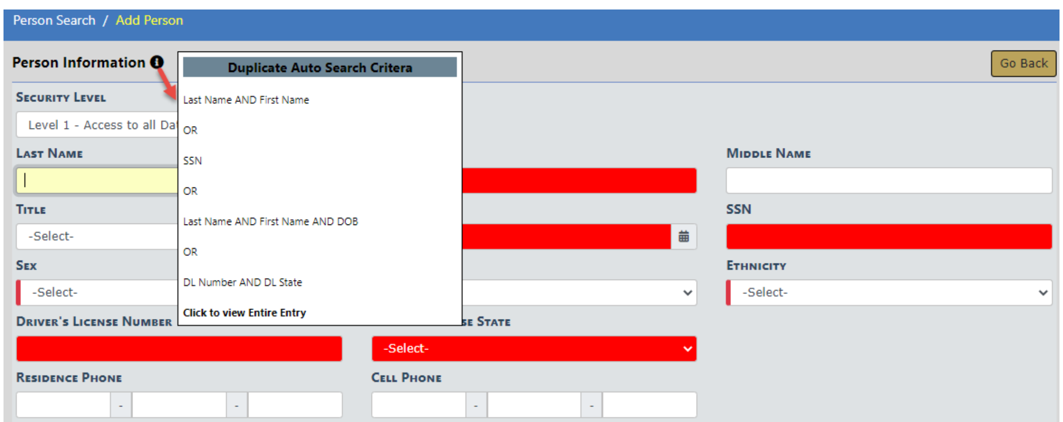
Physical Description, *Person Photo/Mugshot*, *Residence Address* and *Vehicle* are included on the *Add Person* screen.

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

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

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

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



The following describes the duplicate auto search criteria per section:

Person Information

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

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

Residence Address

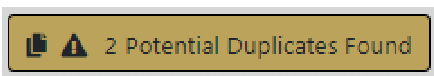
- *Street Number*, *Street Name*, *City*, and *State*

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

Vehicle

- *VIN*
- OR *License* and *State*

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



For more information about duplicate records, refer to "Duplicate Records" on page 120 .

You can add a person one of two ways:

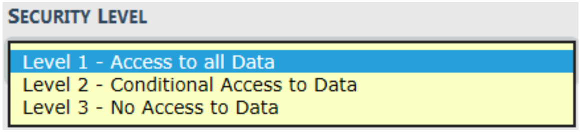
- Manually enter the data in each section.
- Import from external systems, if applicable to your agency.

Manual Entry

Enter Person Information

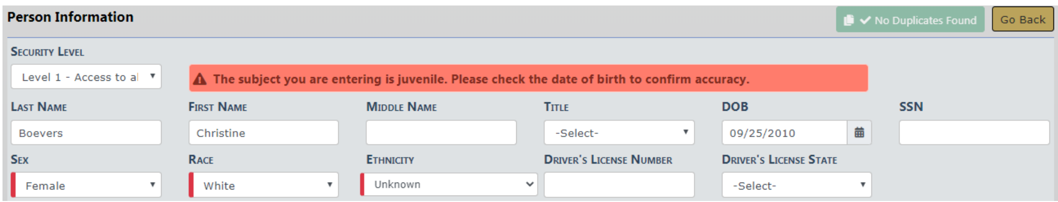
Enter the person information. Online RMS checks for duplicates automatically, and it displays a message indicating whether or not duplicates exist. For more information about duplicate records, refer to "Duplicate Records" on page 120.

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



For more information on Master Index Security, refer to "Master Index Security" on page 85.

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



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

Enter Caution Codes

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

For details on adding a Caution Code, refer to "Caution Codes" on page 127.

Enter Residence Address

Click **Add Residence Address** to open the *Address Search* screen.

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

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

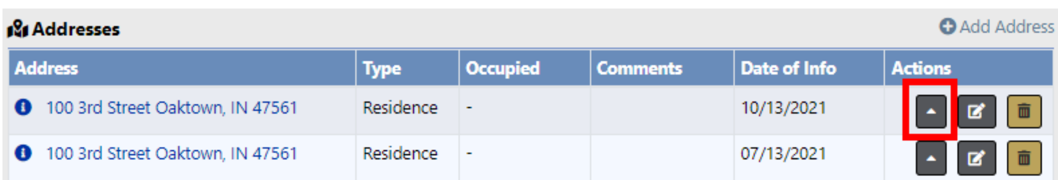
It is important that all addresses save with their corresponding coordinates as Online RMS uses the information when performing event mapping.

After entering address data, Online RMS checks the *Master Address Index* for duplicates automatically, and it displays a message indicating whether or not duplicates exist. For more information about duplicate records, refer to "Duplicate Records" on page 120.

Add Multiple Addresses

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

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



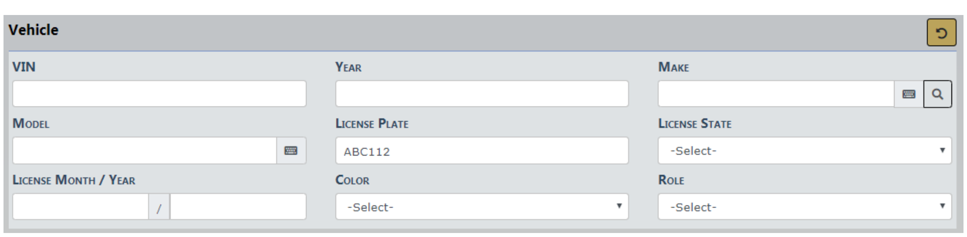
Enter Relations Information

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

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

Enter Vehicle Information

After entering initial vehicle data, Online RMS checks the *Master Vehicle Index* for duplicates automatically, and it displays a message indicating whether or not duplicates exist. For more information about duplicate records, refer to "Duplicate Records" on page 120.

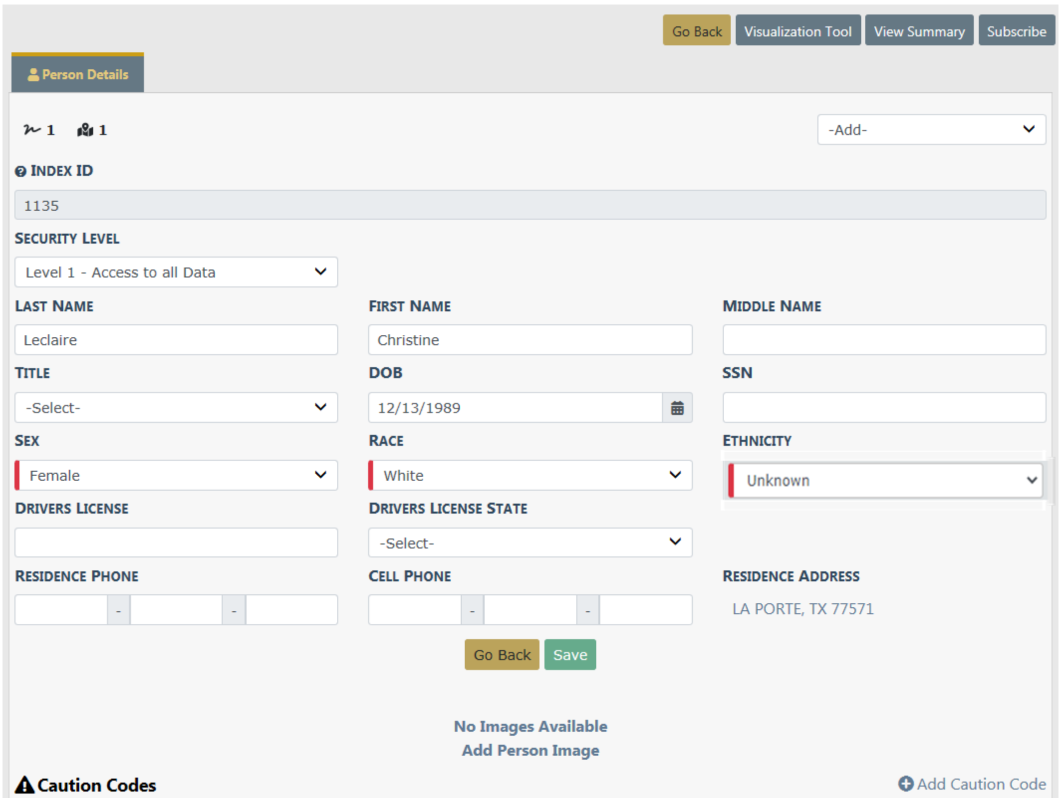


To remove your entered text from the residence address fields, click on the **Reset** button .

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

Save Entry

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



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

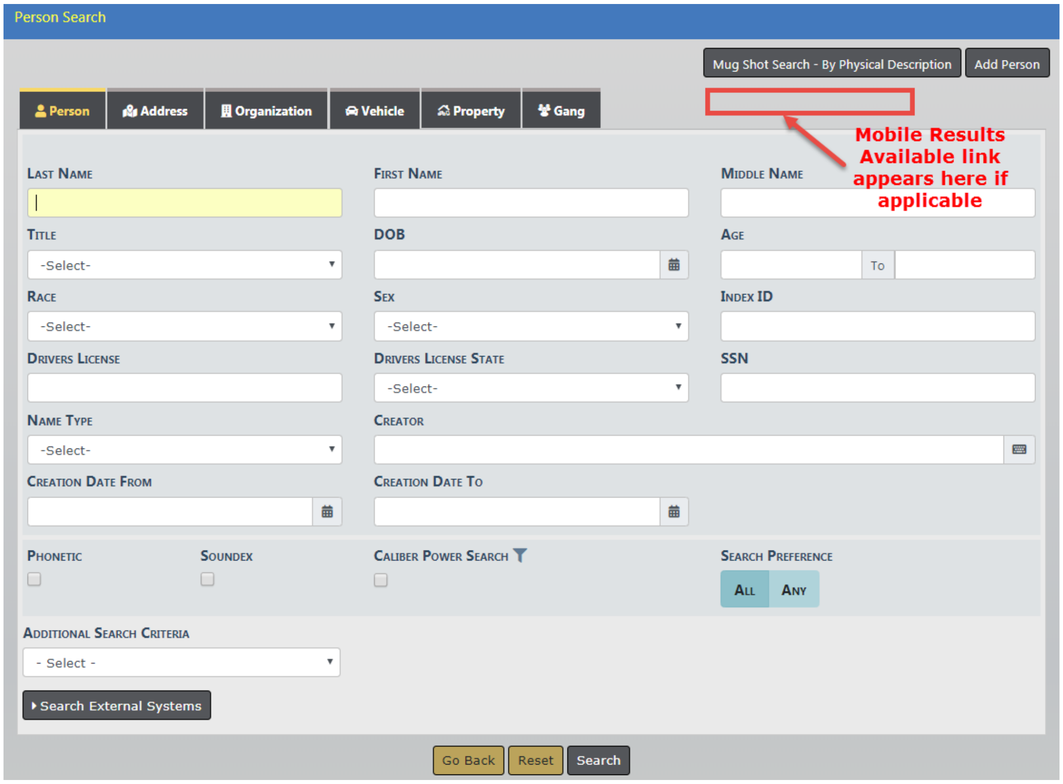
Import/Update Person Results from External Systems

Import New Person

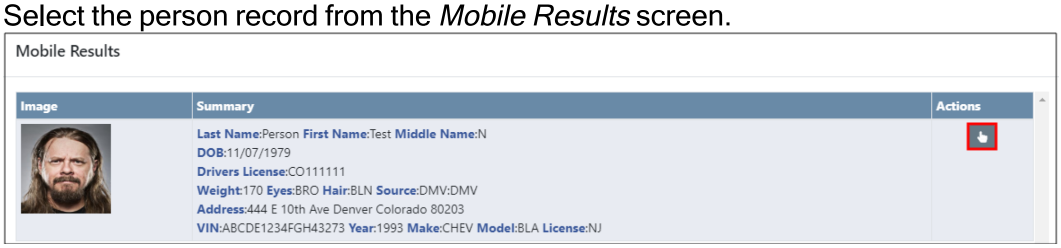
If a person record does not exist in Online RMS, data from the external data source can be imported.

Caliber Mobile

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

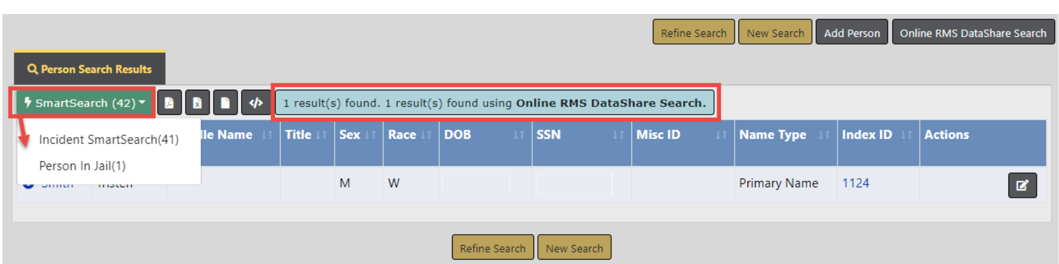


Select the person record from the *Mobile Results* screen.



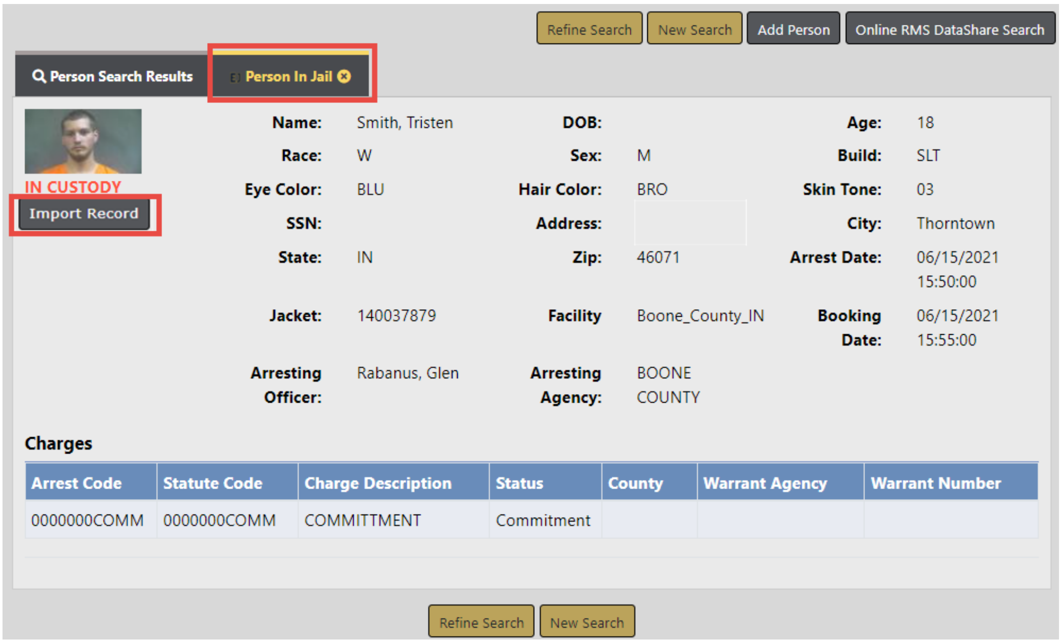
External Person Search Interfaces

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



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

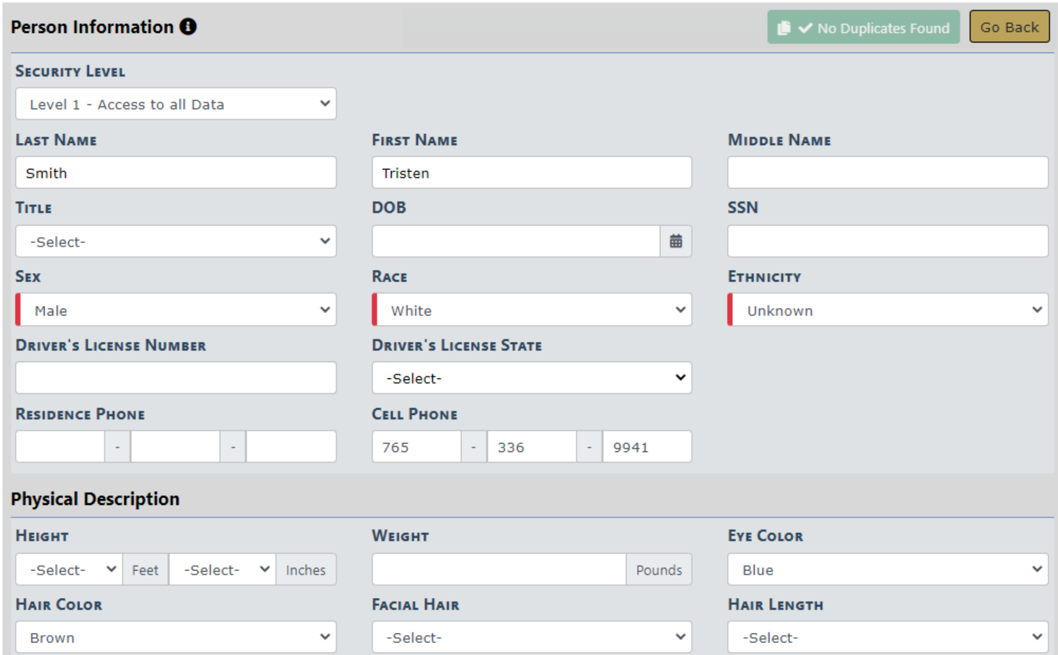
Click **Person in Jail** under **SmartSearch**, then click on **Import Record**.



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

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

The available person, address, vehicle, and image data then imports into the **Add Person** screen. The system then searches for duplicate Master Person, Master Address, and Master Vehicle data automatically. For more information about duplicate records, refer to "Duplicate Records" on page 120 .



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

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

Update Existing Person

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

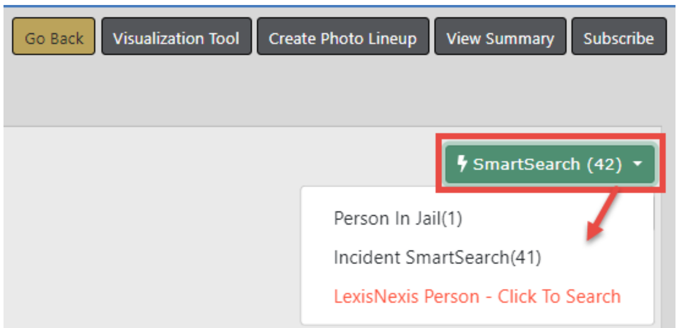
Caliber Mobile

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

For details on importing a person from Caliber Mobile refer to "Caliber Mobile" on page 105.

Other External Data Sources

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



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

Adding Address

Note: When adding a new person, the address can be added as part of that process. For more information about adding a person, refer to "Adding Person" on page 100.

When an initial search of the database does not locate an existing address matching the search parameters, select the **Add Address** button to add the address. For more information about searching addresses, refer to the *Address Search* section of "Searching Master Records" on page 87 .

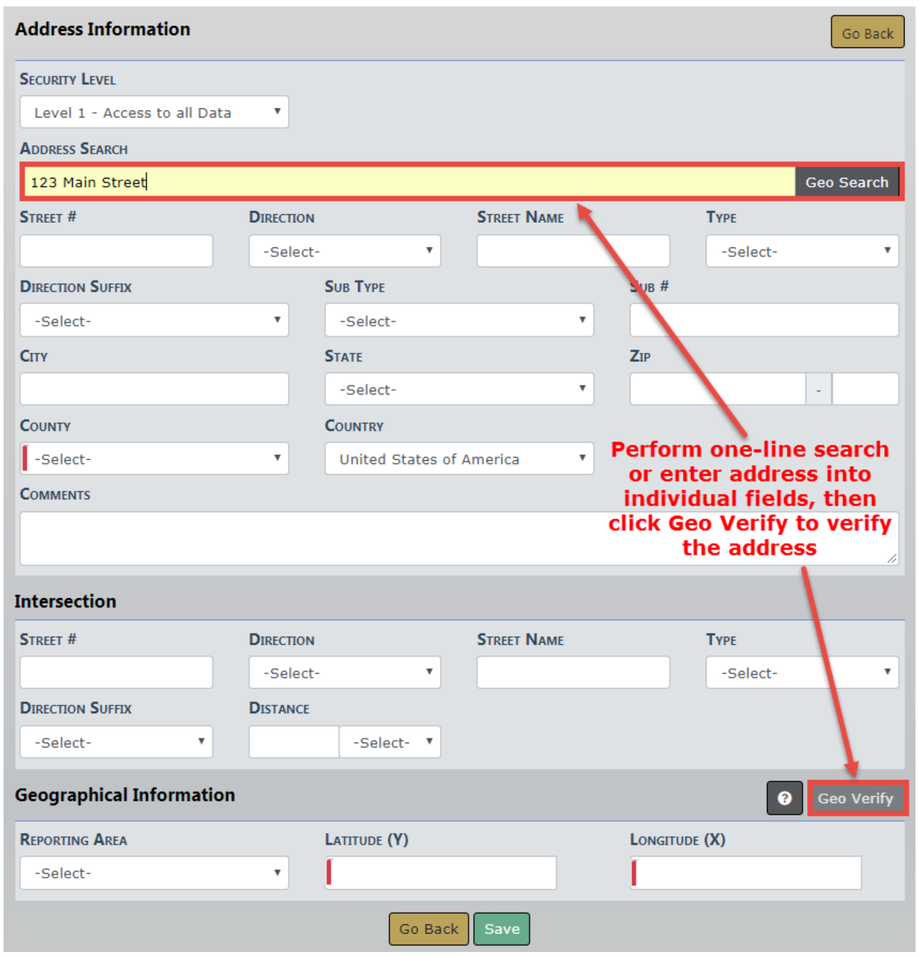
The following fields are required if configured as such for your agency:

- County
  - Your agency administrator can require you to enter the County by setting the ADDRESS_REQUIRE_COUNTY *Maintenance Value* flag to Y. Refer to your agency administrator for more information.
- Latitude and Longitude
  - Your agency administrator can require you to enter the Lat and Long by setting the ADDRESS_REQUIRE_LAT_LONG *Maintenance Value* flag to Y.

Specific Address

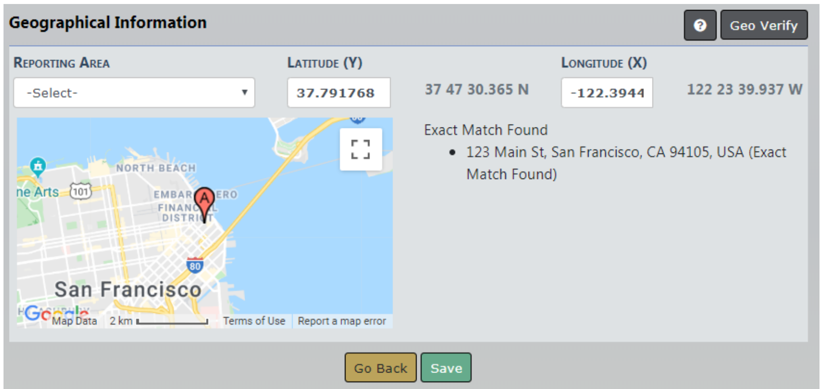
The top *Address Search* line can be used to type part or all of the address on one line and perform a **Geo Search** against **Google Maps**, or you can add the Street #, Direction, Street Name, Type, and City, and State in the appropriate boxes then click to **Geo Verify**.

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



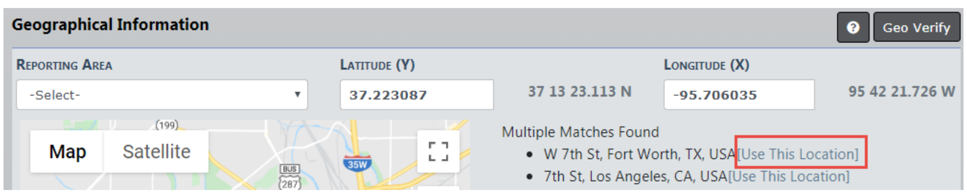
The **Geo Search** returns either an exact address match along with a map showing a pin positioned on it and will fill in the Latitude and Longitude for the searched address, or a possible list of address matches from which you choose fills in the Latitude and Longitude information. If the returned pin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

Example of an exact match:



Note: Beginning with software version 11.13, maps have **+/-** buttons to facilitate zooming in and out for users not using a mouse.

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



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

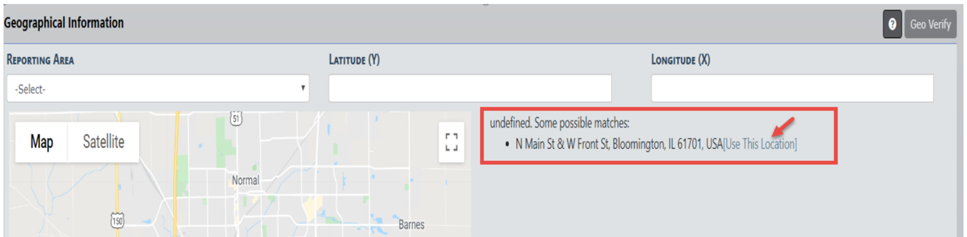
Note: Vehicle, Gang, and Organization information is added by using the same process; searching for an existing record first. If the record does not exist, select the *add* hyperlink.

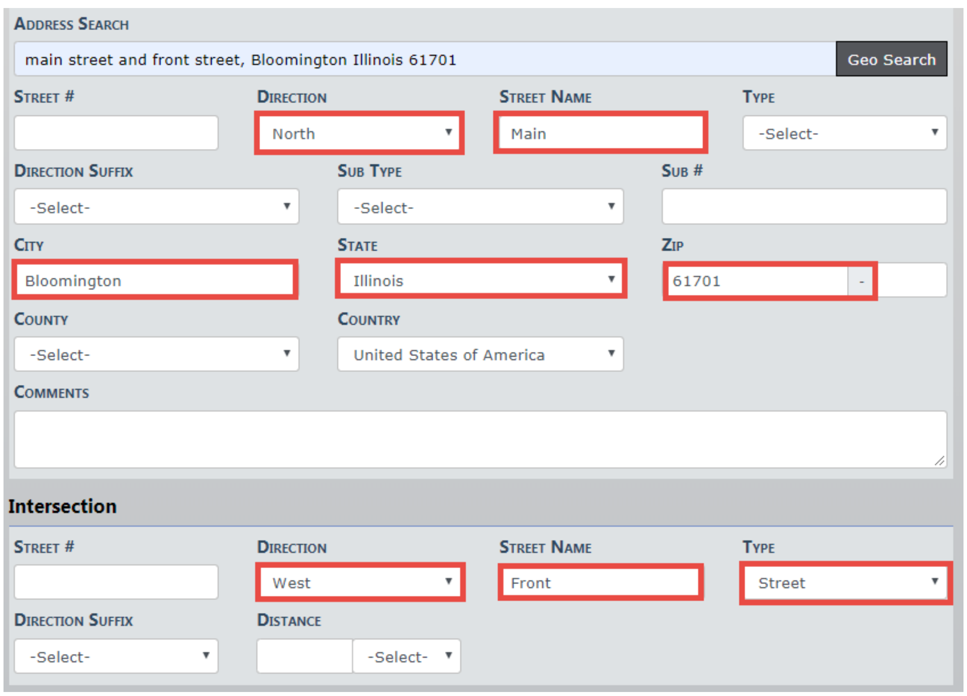
Intersections

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

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

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

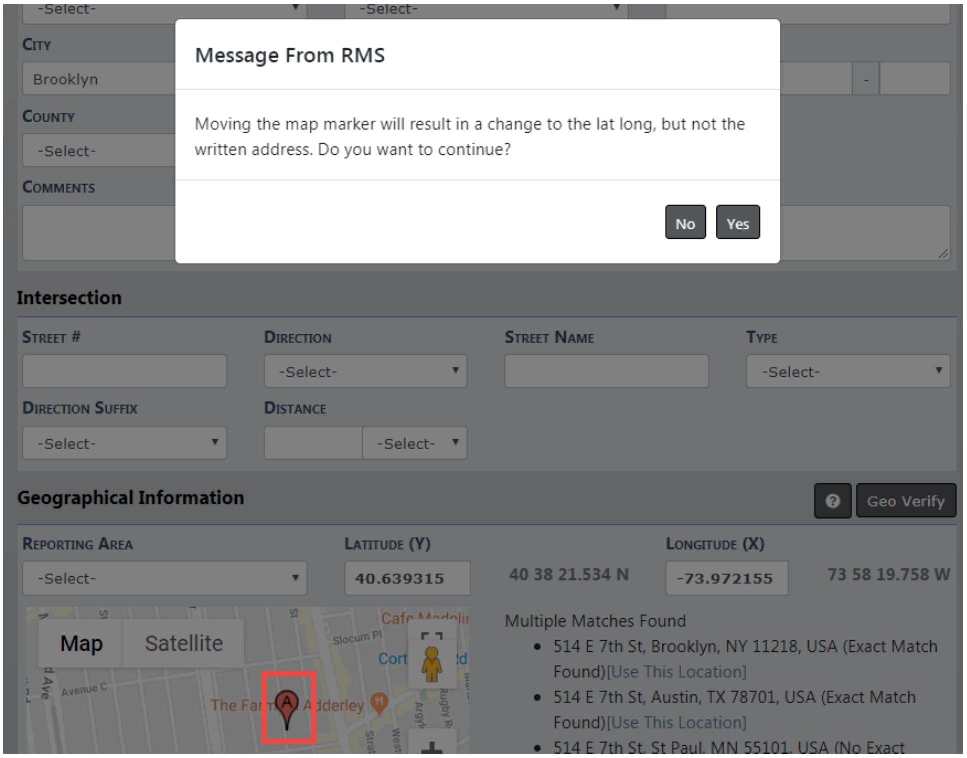




Dynamic Map Marker

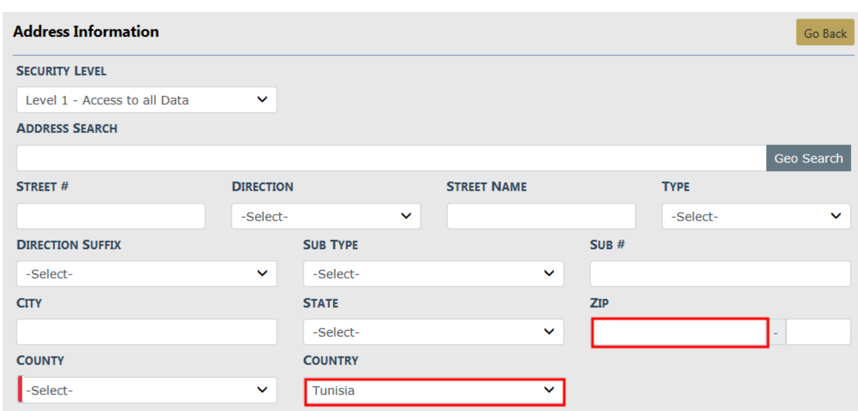
For events occurring at locations that are not at a specific address, you can drag the map marker location on the map to use Geo-Coordinates for that location. Choose a result from the location matches found, then drag the Map Marker to the exact location on the map to update the Geo-Coordinates for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

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



Other Countries

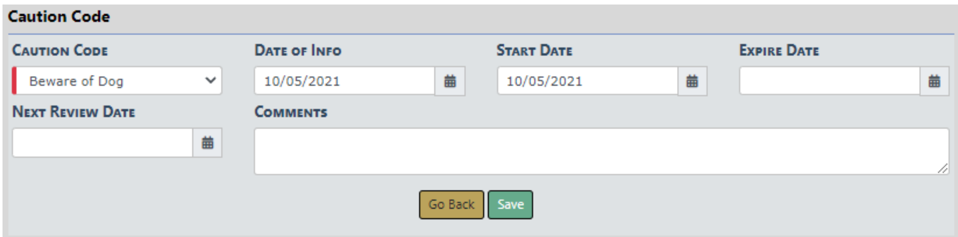
When choosing a **Country** other than the *United States*, the system does not validate or enforce **Zip Code** entry rules.



Caution Codes

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

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



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

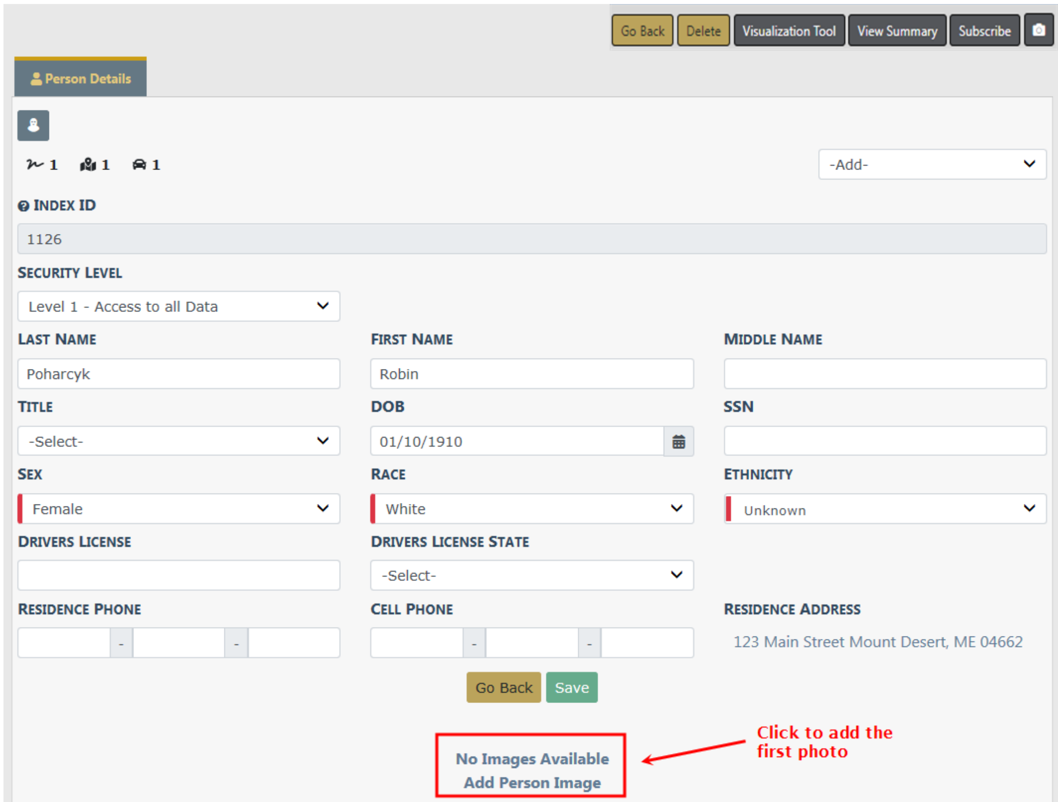
You can then add related events and attachments to the Caution Code.

For more information on Caution Codes, refer to "Caution Codes" on page 127.

Adding Photos

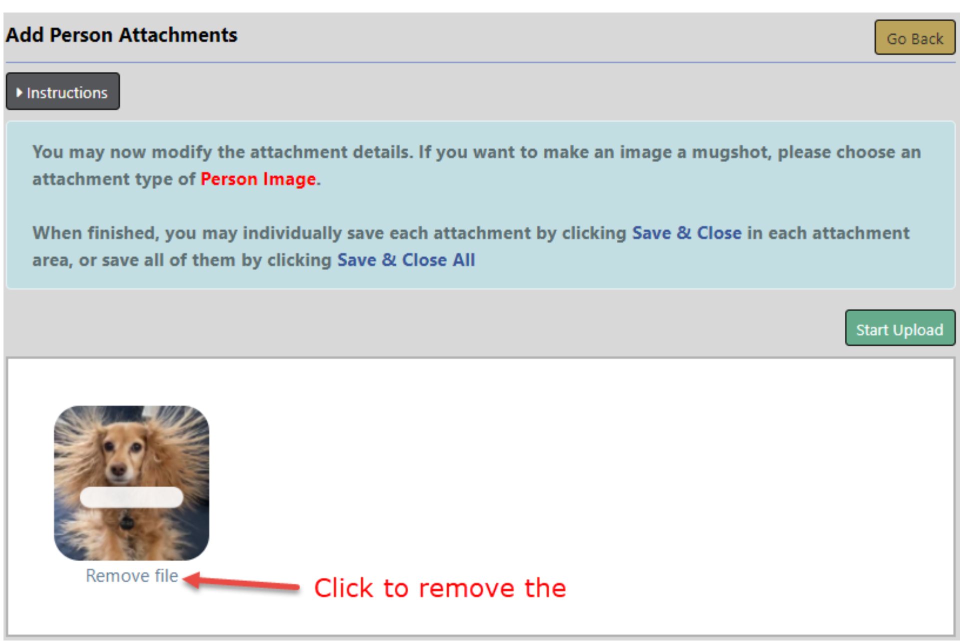
Adding the First Photo

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



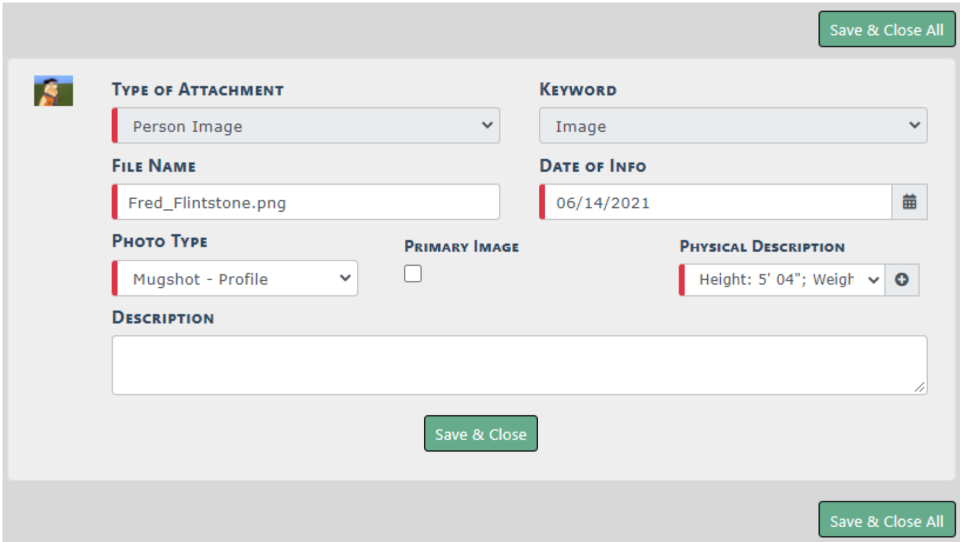
2. Either **drag and drop** one or more photos onto the space provided, or click **Add Files** to select.

3. Click **Start Upload**.



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

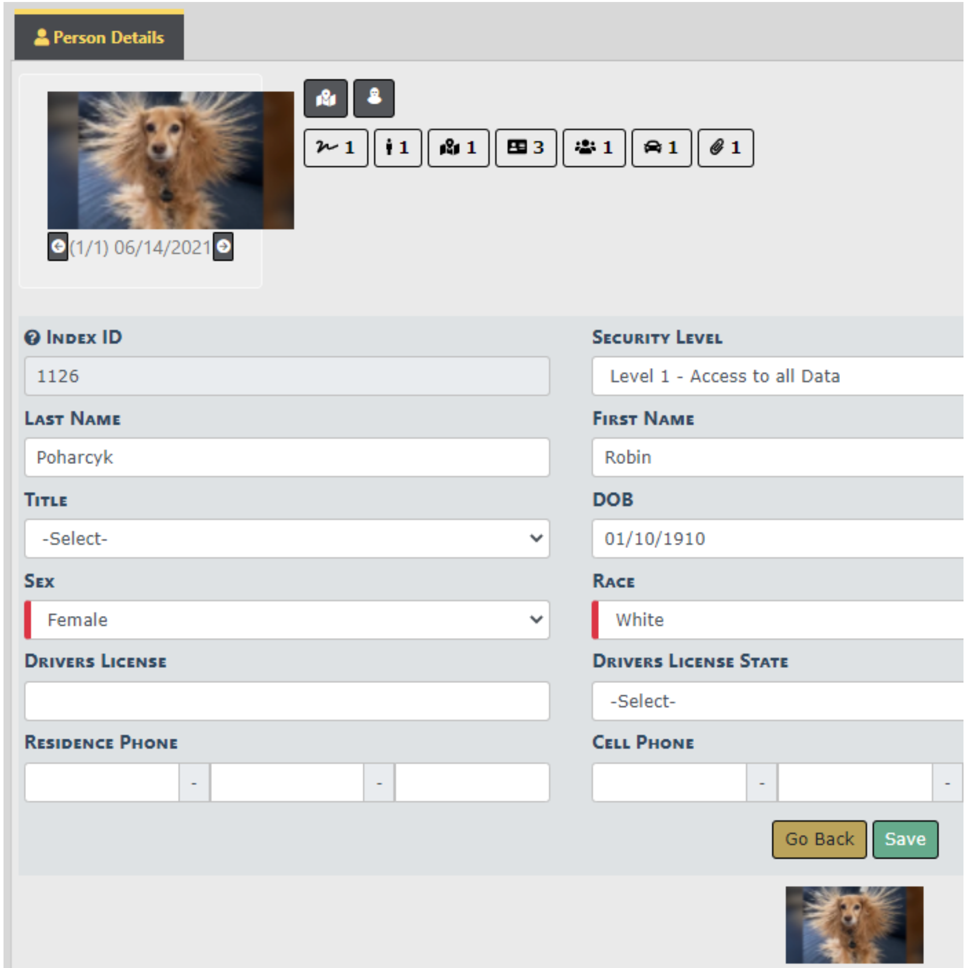
4. A dialog box opens.

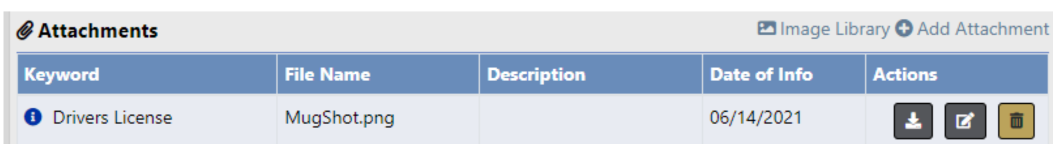


5. Select and enter the necessary information. Select **Primary Image**, if applicable.

6. Click **Save & Close** to save an individual attachment, or click **Save & Close All** to save all attachments.

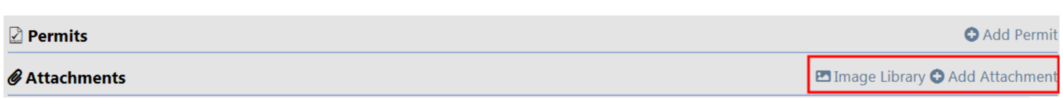
7. The photo uploads to the master person record and the file appears in the *Attachments* grid of the master person record.





Adding Additional Photos

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



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

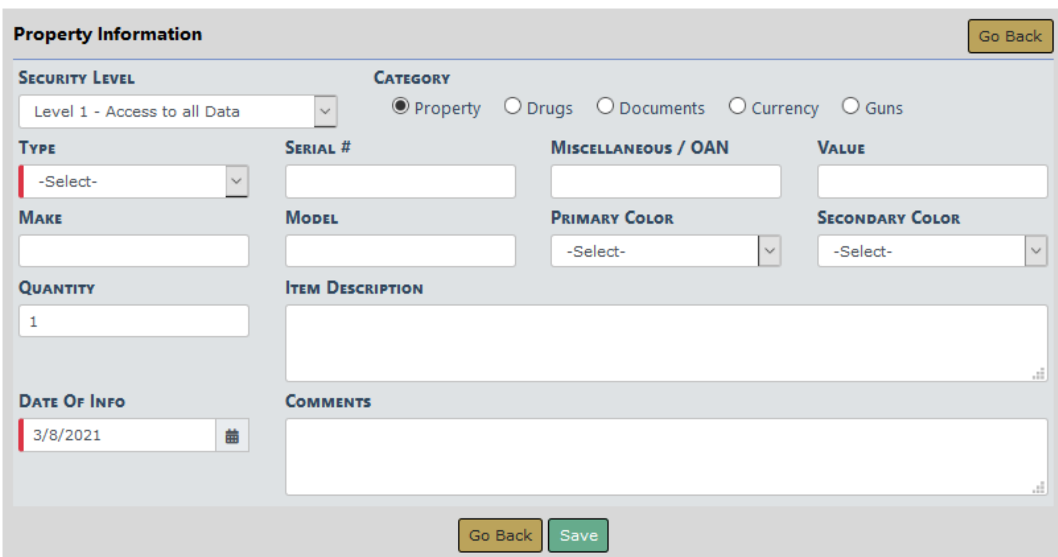
2. Refer to "Add Attachments" on page 69 or "Image Library" on page 75 for more information.

Adding Property

When an initial search of the database does not locate an existing property record that matches the search parameters, select the **Add Property** button. For more information about searching, refer to "Searching Master Records" on page 87 .

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

The *Add Property* form opens.

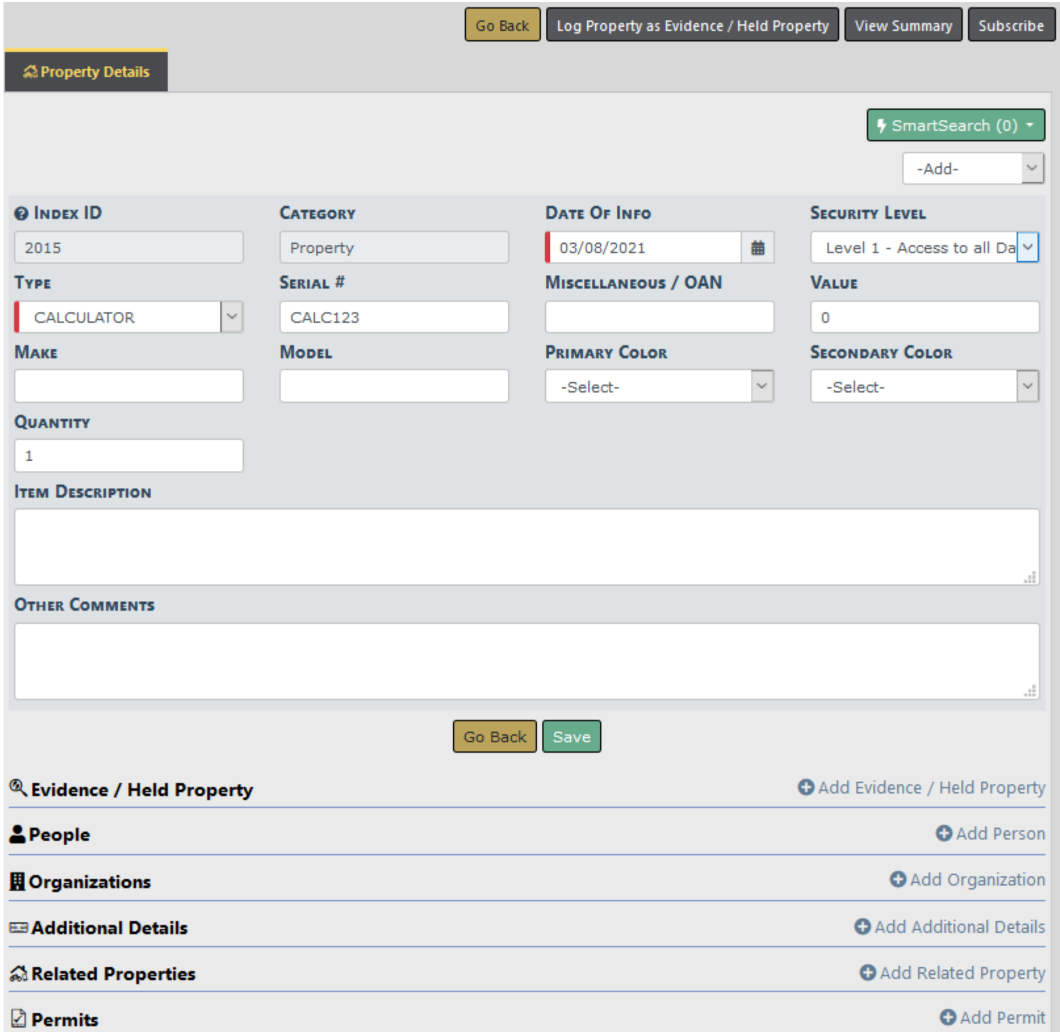

Property Information
Go Back
Security Level
Level 1 - Access to all Data
Category
Property
Drugs
Documents
Currency
Guns
Type
-Select-
Serial #
Miscellaneous / OAN
Value
Make
Model
Primary Color
-Select-
Secondary Color
-Select-
Quantity
1
Item Description
Date Of Info
3/8/2021
Comments
Go Back
Save

Select a **Security Level**. For more information on Master Index security levels, refer to "Master Index Security" on page 85.

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

Enter details of the property in the fields provided.

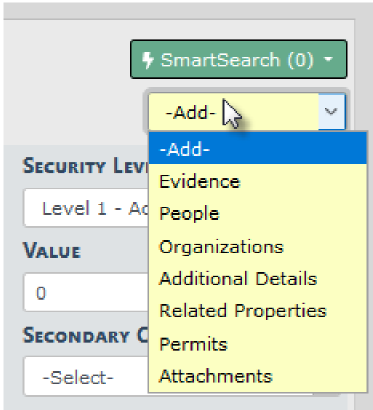
Select the **Save** button to create the record and open the *Edit Property* form.



Enter other information into the fields provided and click **Save**.

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

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

- 

- Also, you can click the **Log Property Evidence/Held Property** button to log the property as either evidence or held property. For more information on evidence and held property, refer to "Evidence/Property Mgmt Module Overview" on page 497.

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

Click on the **Subscribe** button to receive a notification when another user views, updates or associates the property record. For more information on subscribing, refer to "Subscribe to Master Records" on page 134.

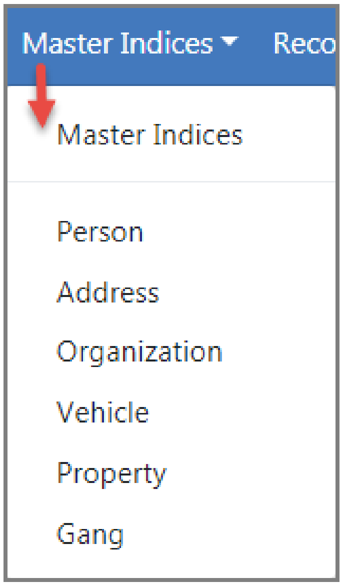
Duplicate Records

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

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

For descriptive information on *Master Indices*, refer to "Master Indices Overview" on page 83.

For instructions on entering a new person or address record, refer to "Adding Person" on page 100 or "Adding Address" on page 109, respectively.



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

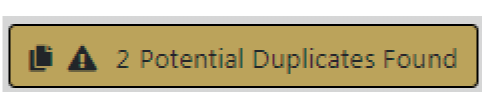
No Duplicates Found

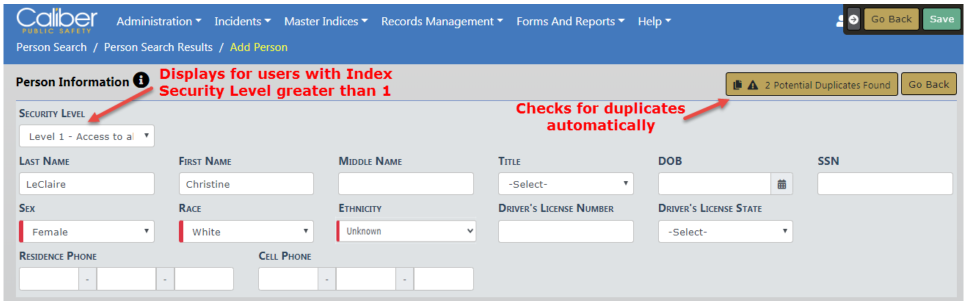
If no duplicates are found, a green *No Duplicates Found* message appears on the top right of the section.

Possible Duplicates Found

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

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

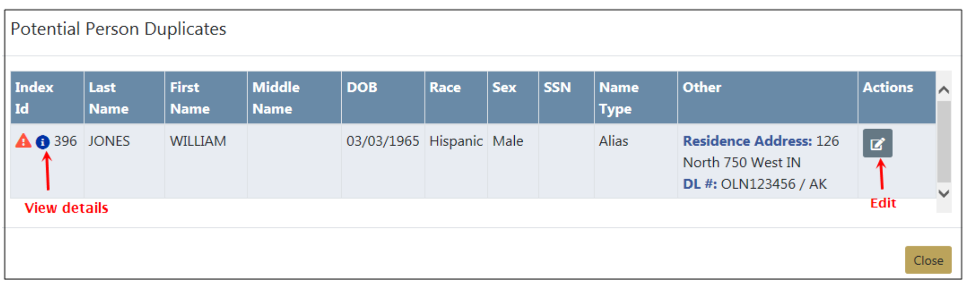




Click on **Potential Duplicates Found** to view the existing records.

Person Duplicates

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



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

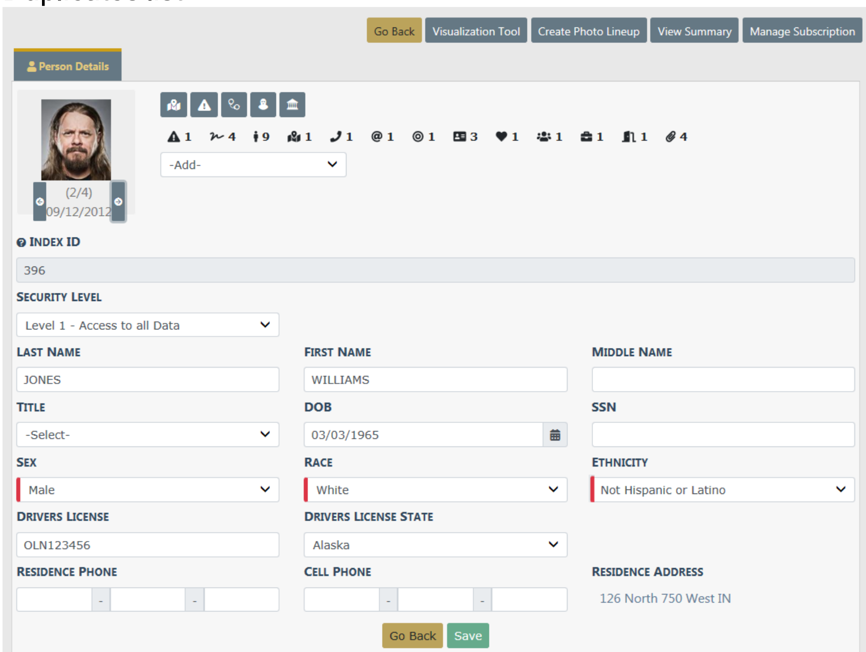
If duplicate entries exist for the same record they can be **Collapsed** together to create one record. Please contact your agency administrator if this function needs to be performed on the duplicate records.

View Details

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

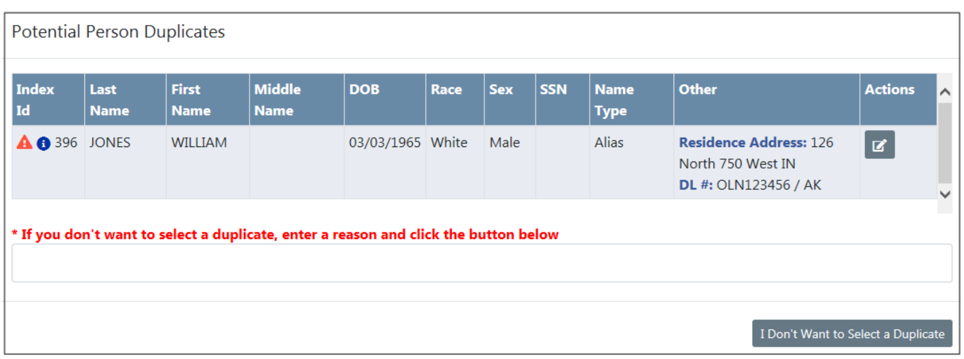
Edit Record

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



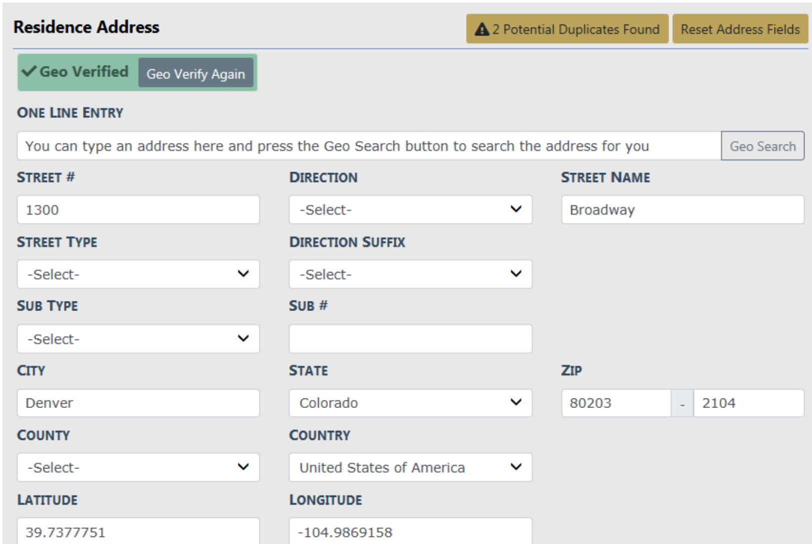
Make the necessary updates, then click **Save**, or click **Go Back** to return to the **Add Person** screen.

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

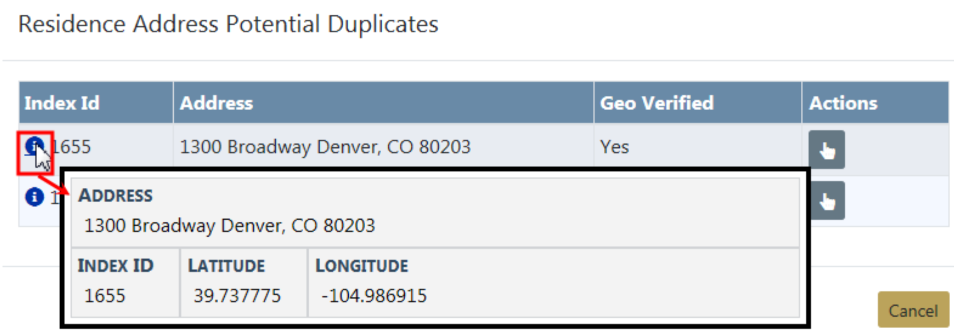


Residence Address Duplicates

Enter the address information.



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

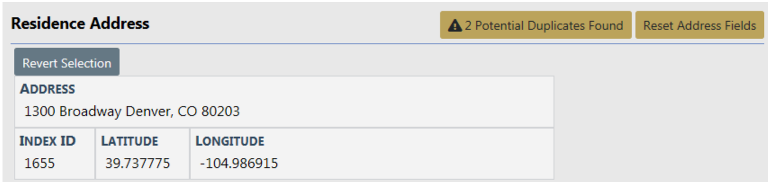


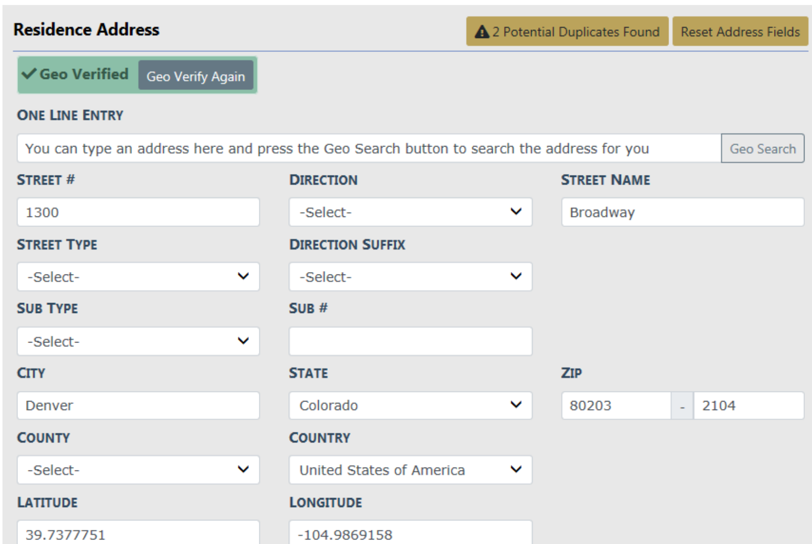
Optionally, click on or hover over the blue information bubble to view additional information.

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

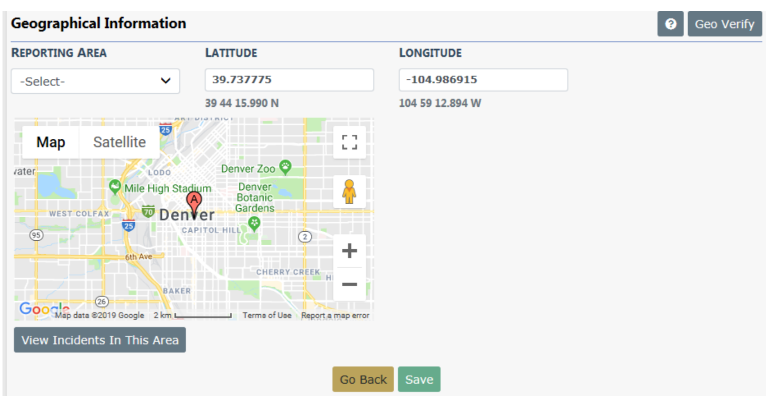
Optionally, click the **Reset Address Fields** button to clear the entered data.

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





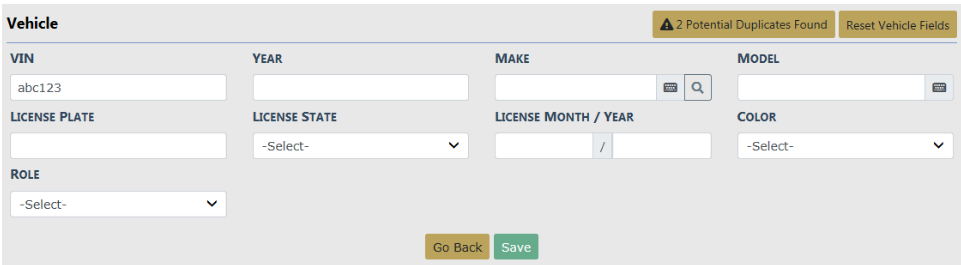
When selecting an existing record from the list, the system inserts the address map.



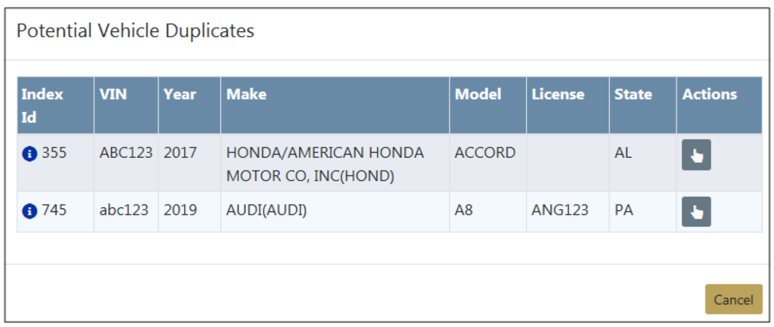
Click the **Save** button.

Vehicle Duplicates

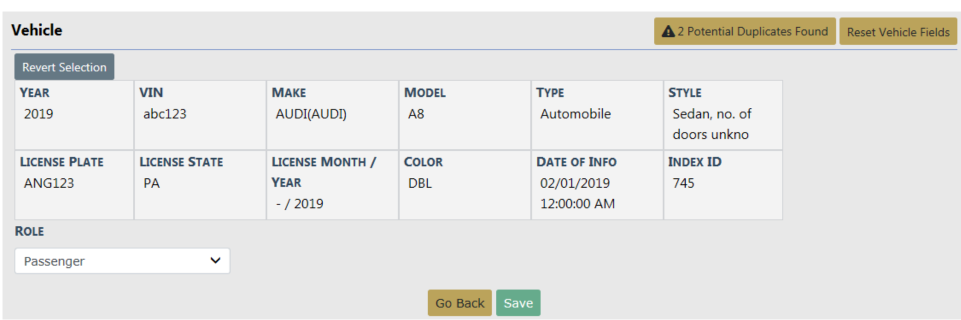
Click on the *Potential Duplicates Found* message to display the list of duplicate records, to manually assess whether or not duplicates truly exist. With proper permissions you can view details or edit (update) the existing records that appear in the list instead of creating a new entry.



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

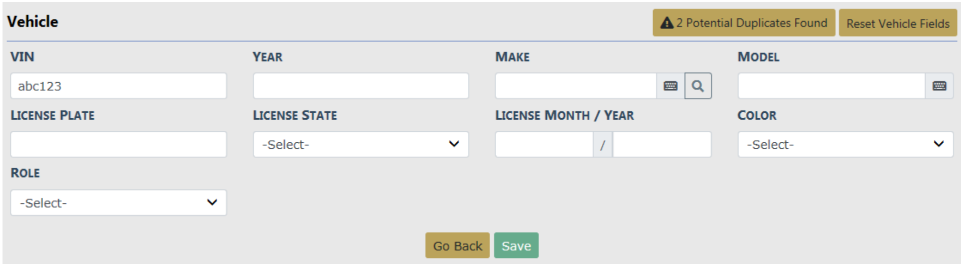


When selecting an existing record from the list, the system inserts the selected vehicle information. Select the **Role**.



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

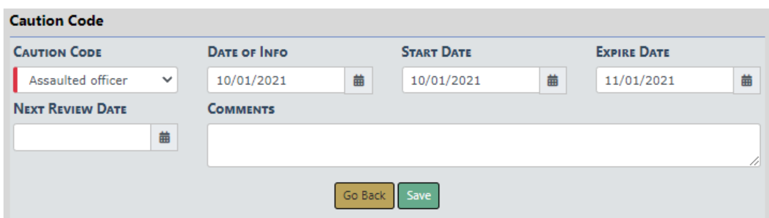
Optionally, click the **Revert Selection** button on the upper left to remove the vehicle and redisplay vehicle fields.



Click **Save**.

Caution Codes

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



Choose a **Caution Code** from the drop-down list.

Enter the **Date of Info**.

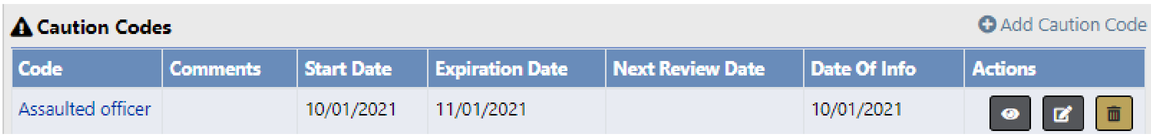
Enter the **Start Date**.

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

Click **Save** to create an **Active Alert** on that person or address. A red *Alert Icon* appears next to the person's name or address in the *Search Results* window, indicating **Active Alerts**. Refer to "Searching Master Records" on page 87 for details.

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

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

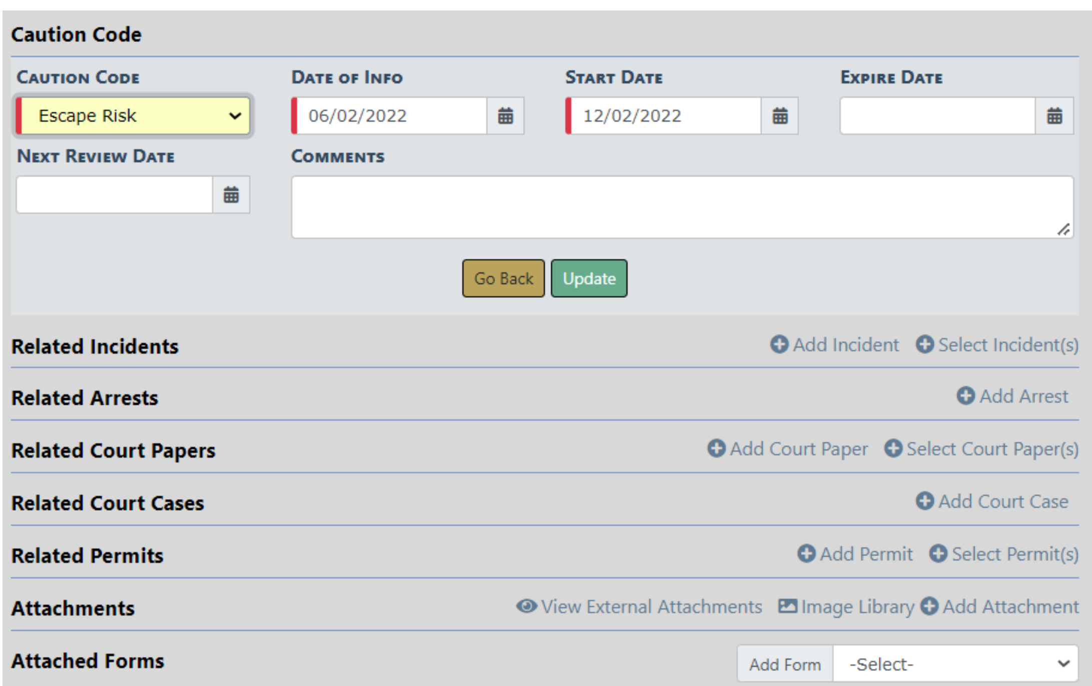


Related Events

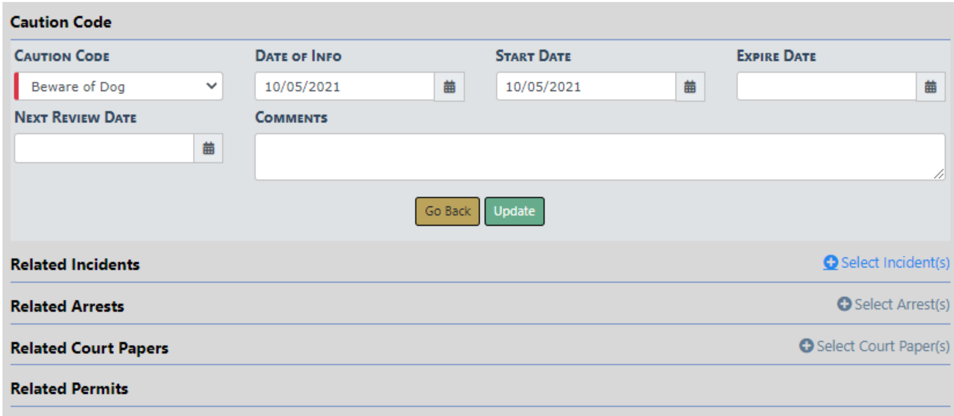
When adding Caution Codes, you can add related events, such as Related Incidents, Related Arrests, Related Court Papers, Related Court Cases, and Related Permits.

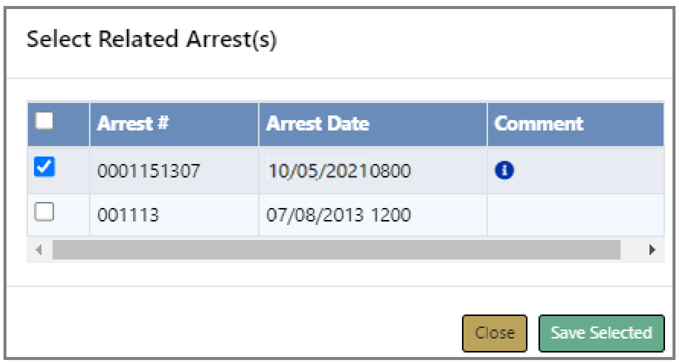
Click the Edit icon in the Caution Code grid to edit the Caution Code.

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

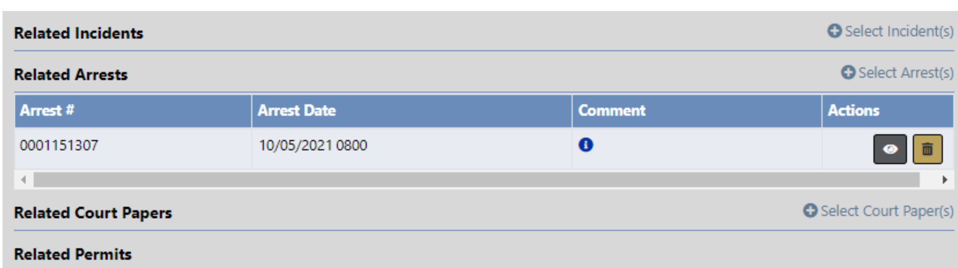


As an example, to associate one or more arrests, click **Select Arrests** to display of list of choices from which to choose.





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



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

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

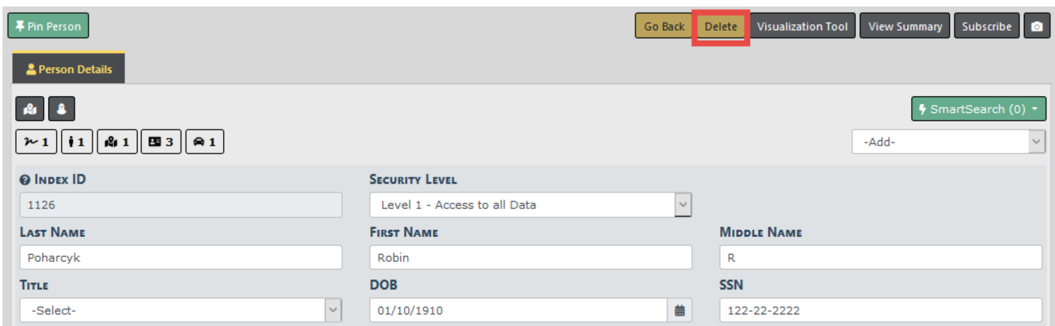
- Location section on the Incident, Arrest.
- Master Index Organization address.
- Organization Summary Tag.
- Master Index Person Address.

Click the **Update** button to save.

Deleting Master Index Records

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

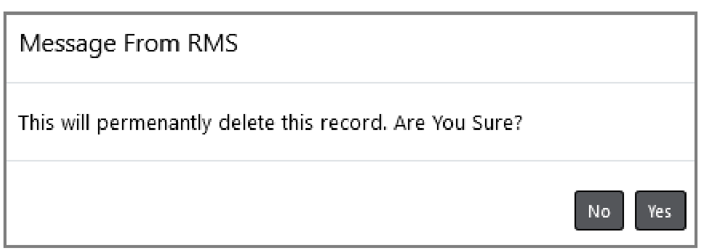
A **Delete** button appears on the top of the window while on a Master Index record as shown in the example below. This applies to all master index types: Person, Address, Organization, Vehicle, Property, and Gang.



For details on accessing the Master Indices, refer to "Accessing Master Indices" on page 86.

For details on searching for Master Index records, refer to "Searching Master Records" on page 87.

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

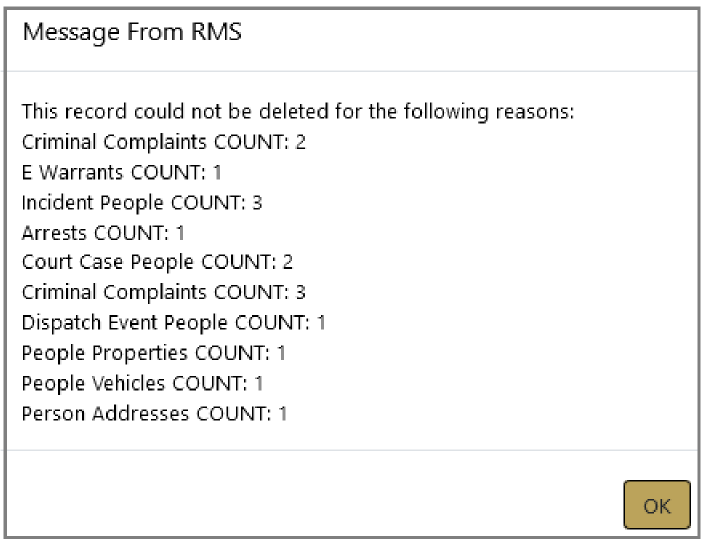


The process then scans the system for possible links to other Online RMS modules.

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

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

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



Click **OK** to close the window.

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

Print Master Person Records

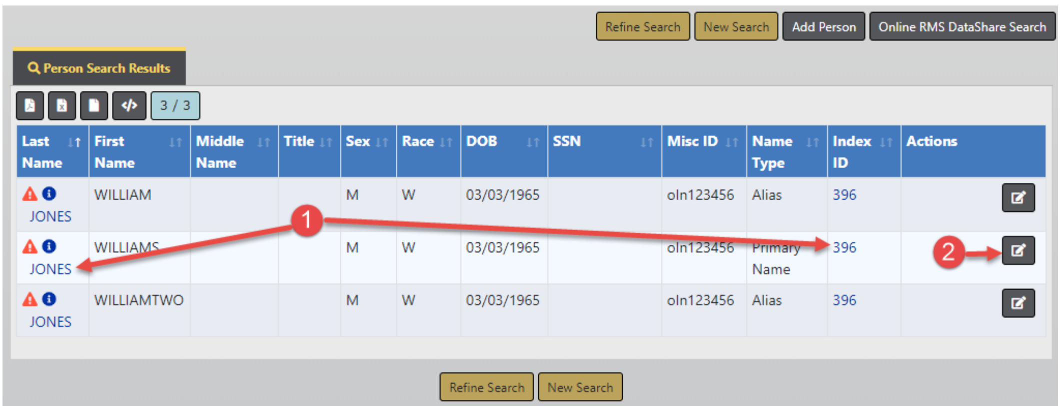
Master person records can be printed from the *View Person Details* page.

To print a master person record:

Search for and select the appropriate master person record.

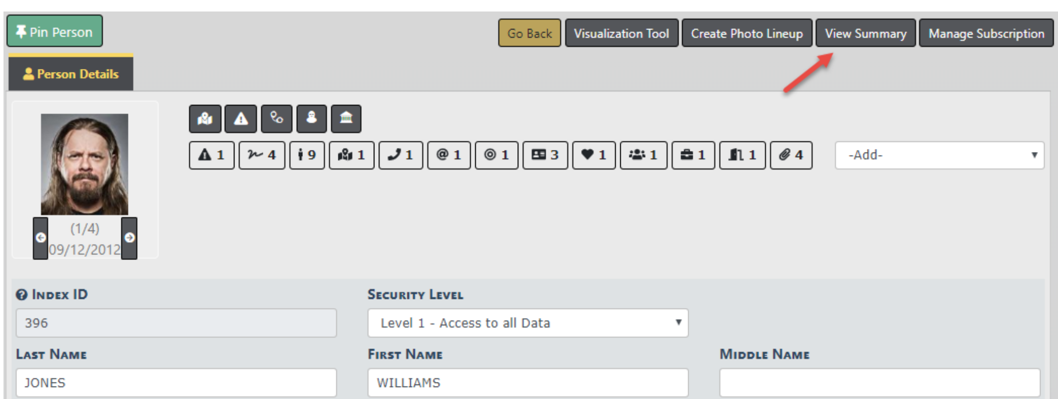
For details on accessing the Master Indices, refer to "Accessing Master Indices" on page 86.
For details on searching for Master Index records, refer to "Searching Master Records" on page 87.

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

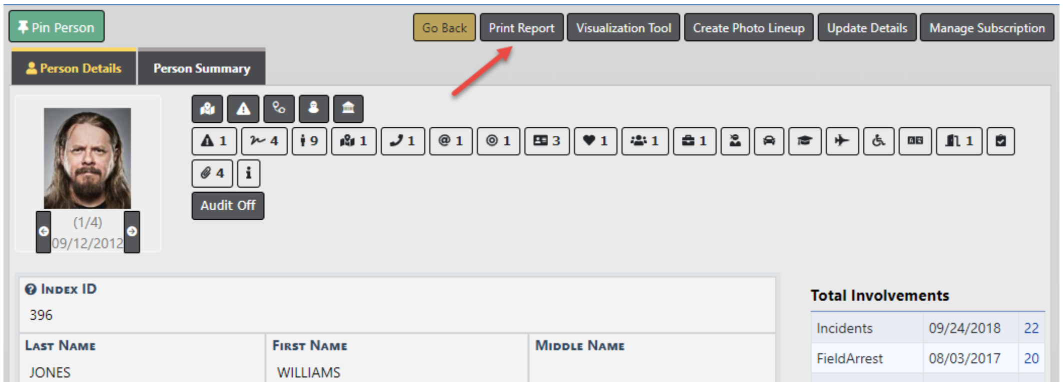


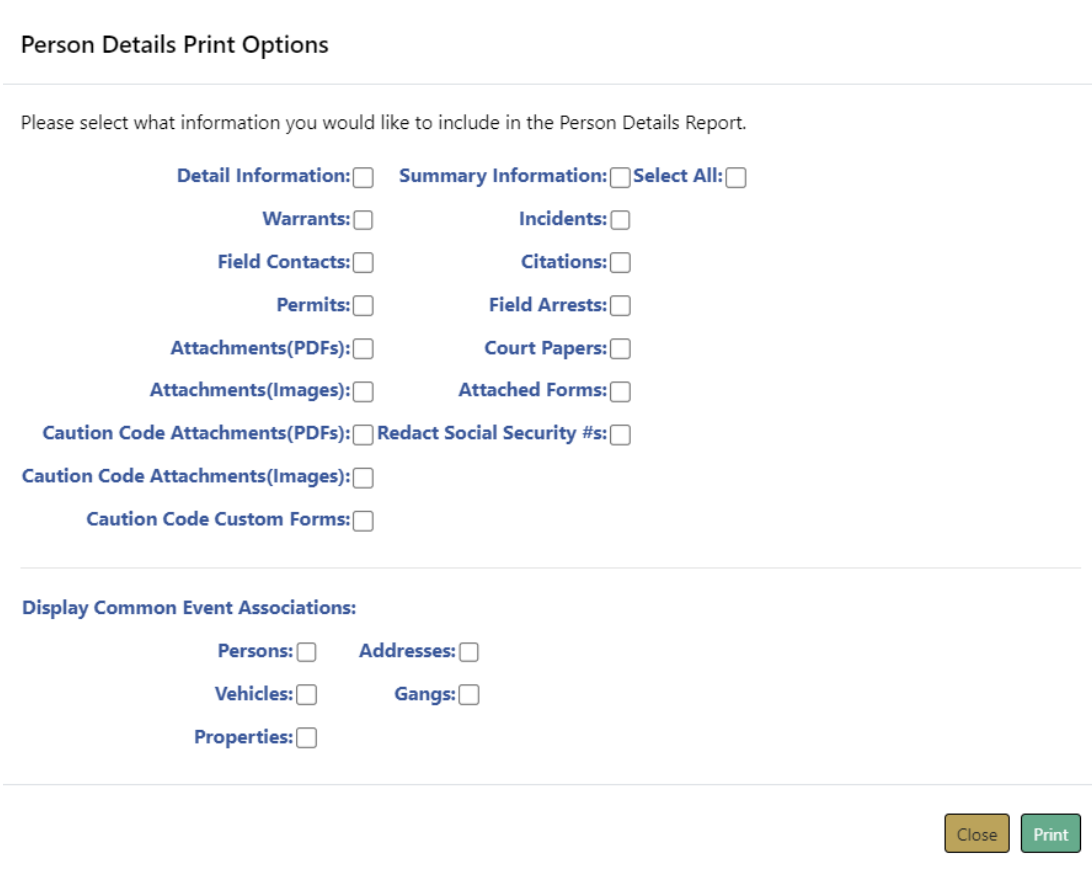
1. Click on the **Last Name** or **Index ID** to open that person's *View Person Details* page.

2. Or, click on the edit icon to open the *Edit Person* page



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





Select one or more options listed, or **Select All** to include all options. (Beginning with 11.13 and higher, there is an option to redact the SSN for the person detail printed.)

Click the **Print** button.

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

Note: If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

Subscribe to Master Records

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

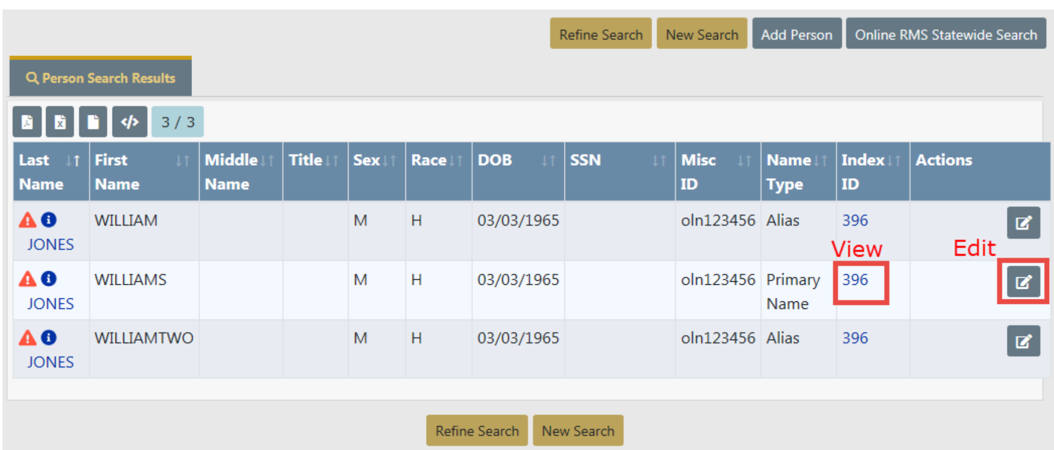
For example, you can **Subscribe** to Williams Jones' master person record to receive notification when someone applies updates to his master person record.

Follow these steps to Subscribe:

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

   For more information on searching, refer to "Searching Master Records" on page 87.

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



3. The view or edit form opens, based on which option you chose.

4. Whichever option you chose, a Subscription button appears on the top right of the window.

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

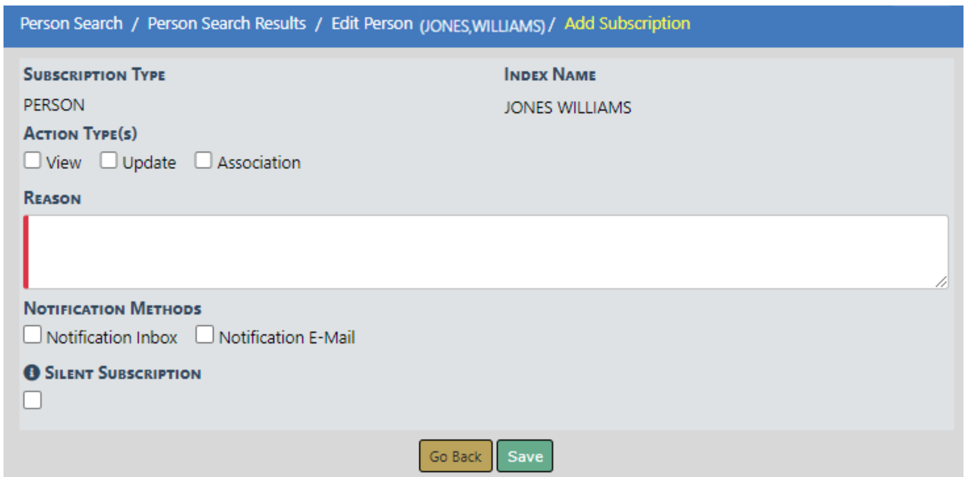
= Add a new subscription.

= Update or delete the existing subscription.

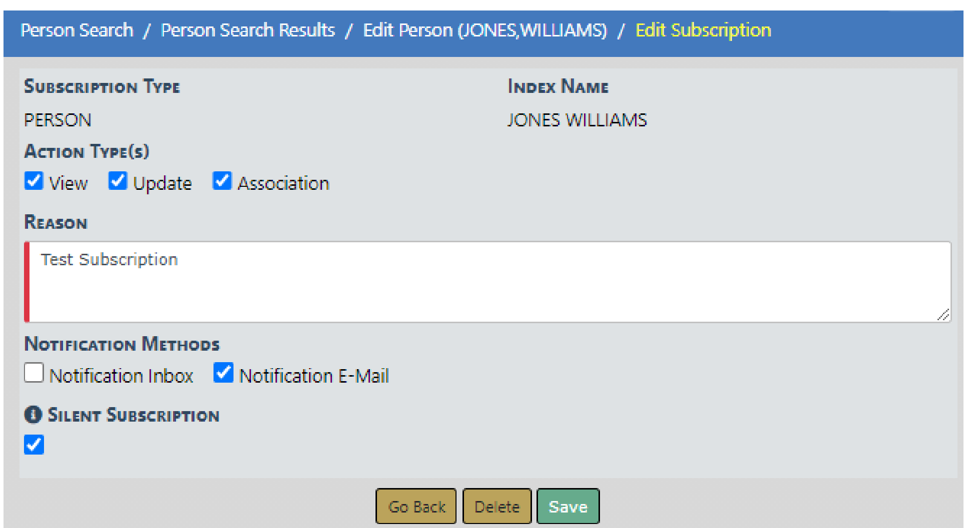
5. Click the button that applies in this case.

6. The **Subscription** form opens.

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



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



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

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

8. Click **Save**.

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

Chapter 9. Photo Lineup

Photo Lineup Overview

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

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

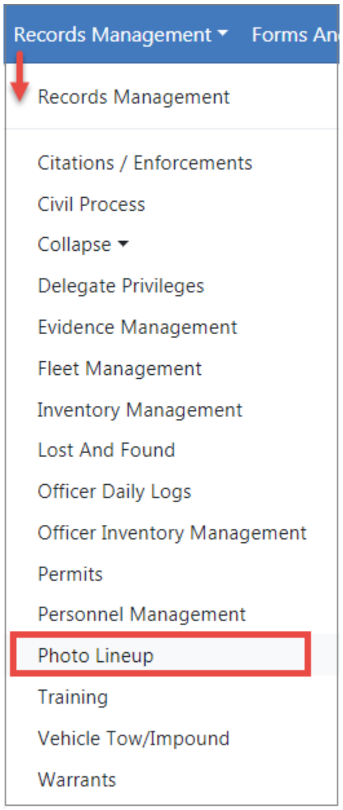
Access Points

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

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

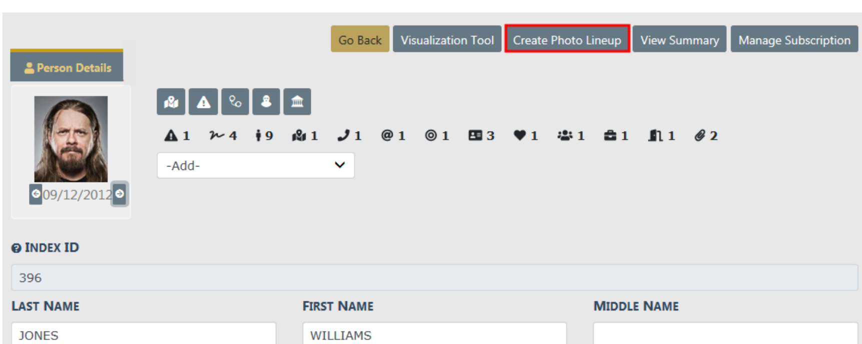
Records Management Menu

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

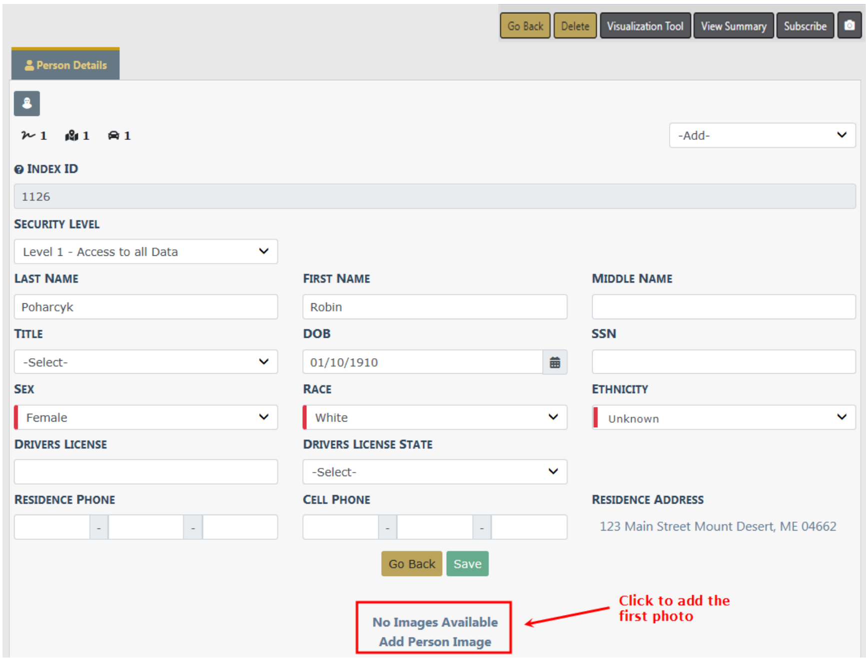


View and Edit Person Pages

Search and select a person from the *Master Name Index* that has a person photo. For detailed instructions on how to search and access *Master Person* records refer to "Searching Master Records" on page 87.

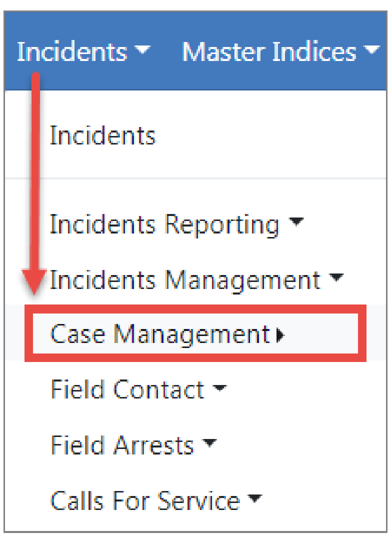


If an image does not exist for that person, select *Add Person Image*. For more information refer to "Adding Photos" on page 114.



Follow-up Case Management module.

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



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

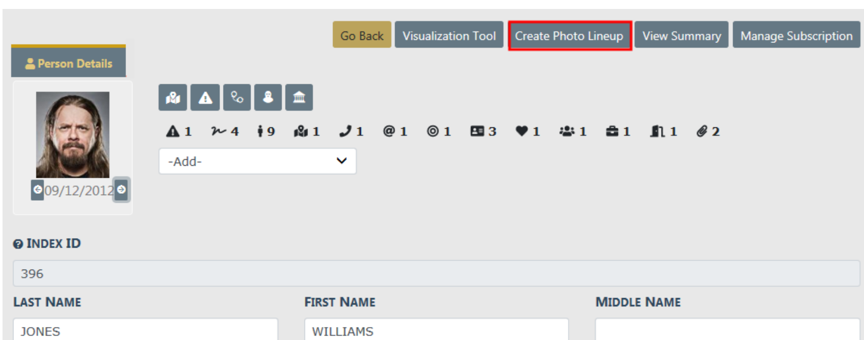
NOTE: For more information on accessing the **Case Management** module refer to "Case Management" on page 455.

Create Photo Lineup

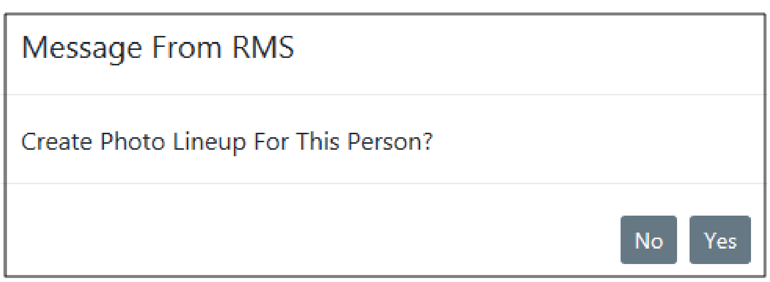
Create a **Photo Lineup** from a *Master Person Index* record that already has an existing photo. If the person does not yet have a photo, one must be added. For instructions on adding an initial photo refer to "Adding Photos" on page 114.

1. Search and select a person from the *Master Name Index*. For instructions on searching for a person refer to "Searching Master Records" on page 87.

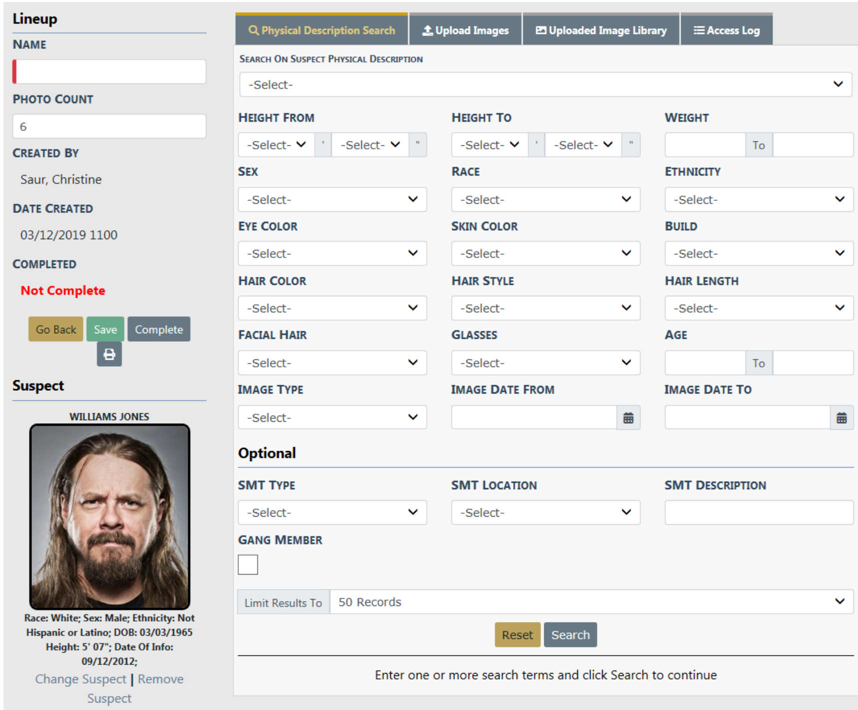
2. Select the **Create Photo Lineup** button.



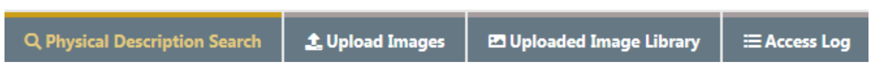
3. Select **Yes** to confirm the creation of the **Photo Lineup**.



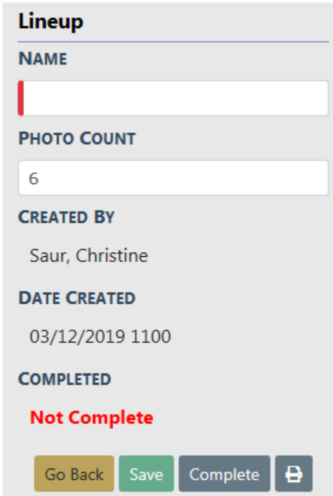
4. The **Photo Lineup** page appears.



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



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

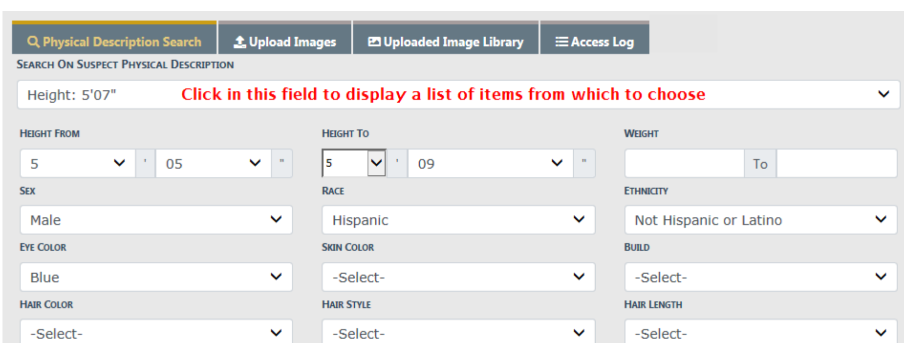


5. You must enter a Lineup **Name**.

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

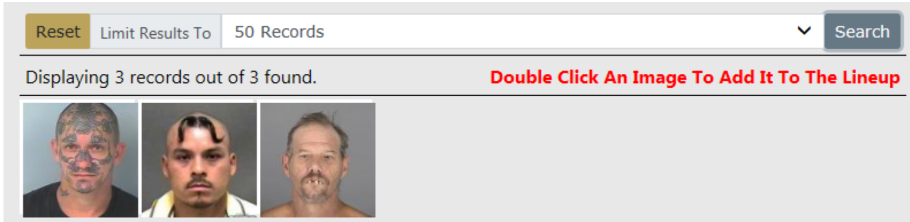
   Or you can manually enter the search parameters without selecting from the drop-down list.

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



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

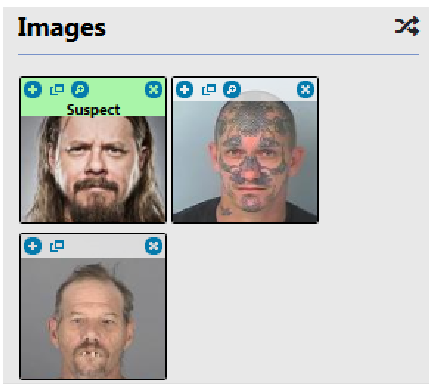
8. Select the **Search** button to find person photos in Online RMS that match your search criteria. The matching person photos appear on the bottom of the window.



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

Select Displayed Images

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



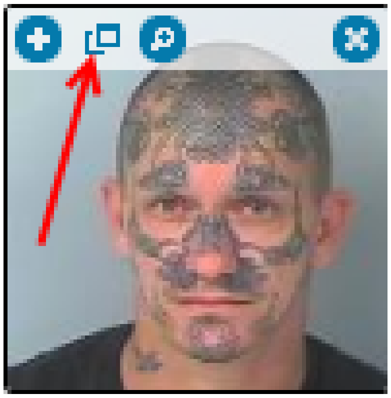
Upload Image File

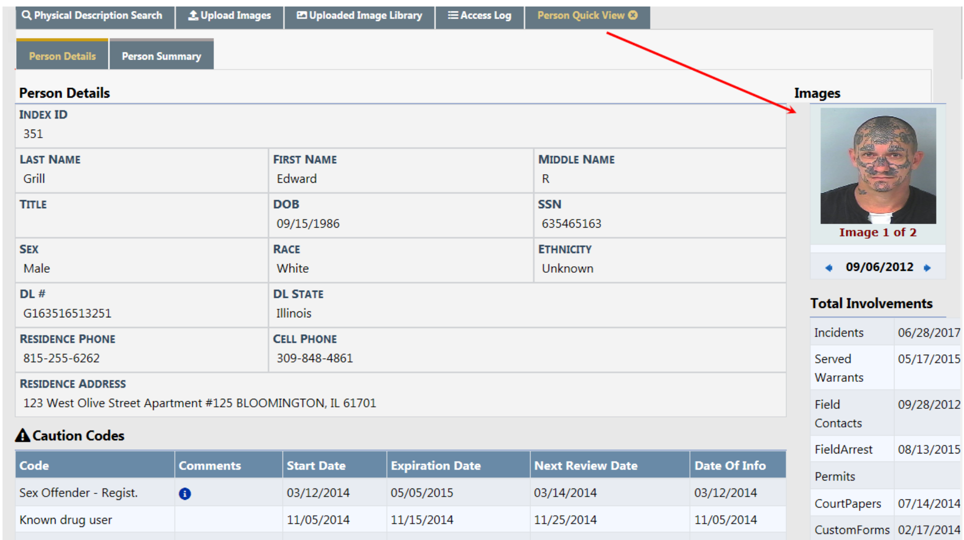
a. Select the **Upload Images** tab, and select the **Add Files** button or **Drag Files** to add photos from your local computer or network drive. For more information on uploading files. refer to "Add Attachments" on page 69.

b. Imported images files are added to **Images** automatically and saved in the **Uploaded Image Library** tab for future use.

10. Get additional photo information.

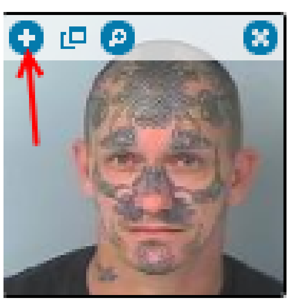
a. Click on the **Quick View** folder icon to open a **Person Quick View** tab containing details of that person.





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

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



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

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

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

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

12. Finalize the photo **Lineup**.

    a. When you are satisfied the **Lineup** is complete, click the **Complete** button to finalize.

    b. The status changes from *Not Complete* to *Complete*.

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

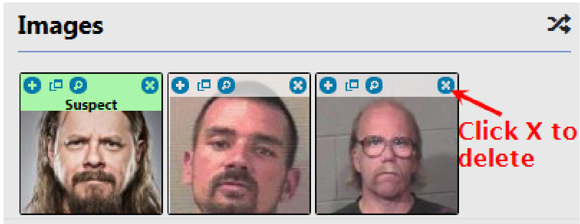
13. Click the **Print** icon to the right of the **Complete** button to print the **Lineup**. For detailed instructions on how to print a photo lineup refer to "Print Photo Lineup" on page 148.

14. Click **Access Log** tab to view a log who accessed the lineup. For more information refer to "Access Log" on page 152.

Remove a Photo

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

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



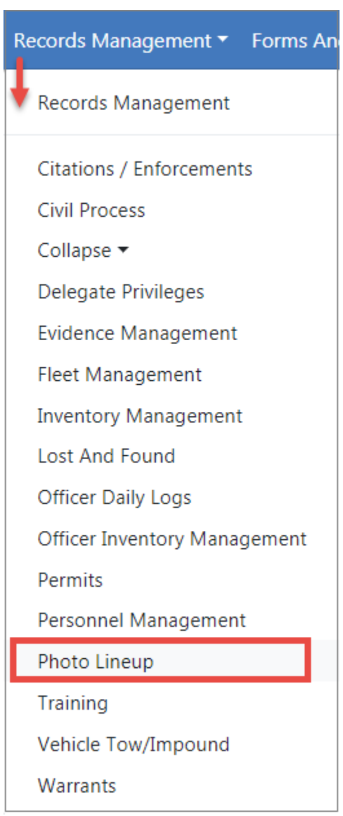
Note: Clicking the **X** removes the image immediately, without a confirmation window.

2. Click the **Save** button.

Search Lineups

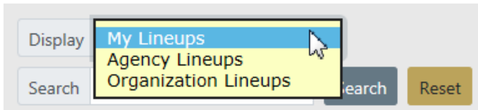
Search Lineups to *view*, *print*, *edit* or *delete* a lineup.

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

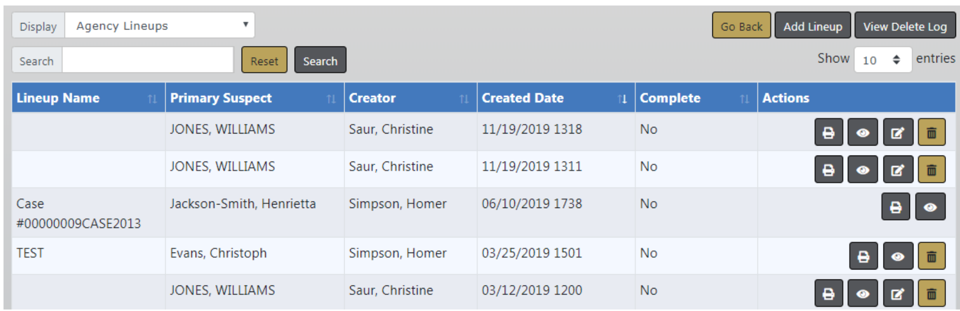


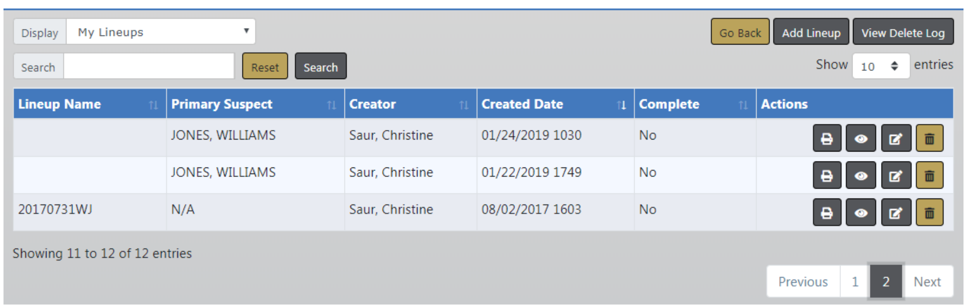
2. Click the **Display** drop-down box to select the group of Lineups to search.

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



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





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

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

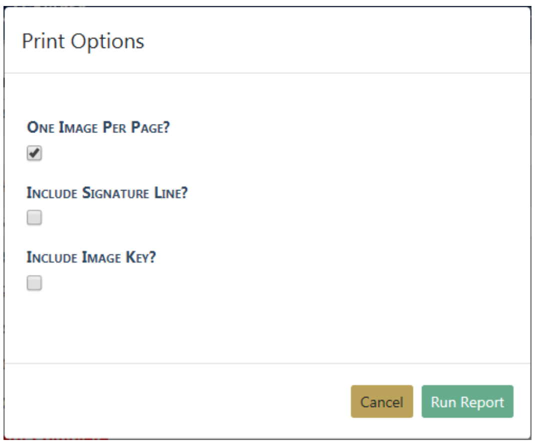
You can *print*, *view*, *edit*, or *delete* **Lineups** from the search results, providing your user account has the proper permissions to do so.

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

Print Photo Lineup

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

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



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

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

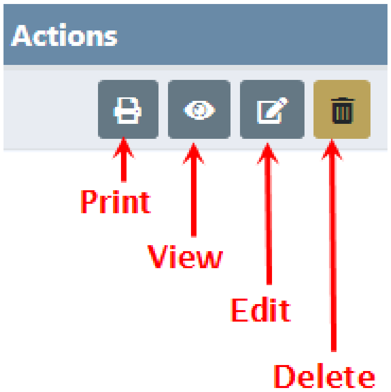
> **Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

View, Edit, Delete Lineups

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

1. **Search** for the **Photo Lineup** you want to *view*, *edit*, or *delete*. For details on searching refer to "Search Lineups" on page 146.

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

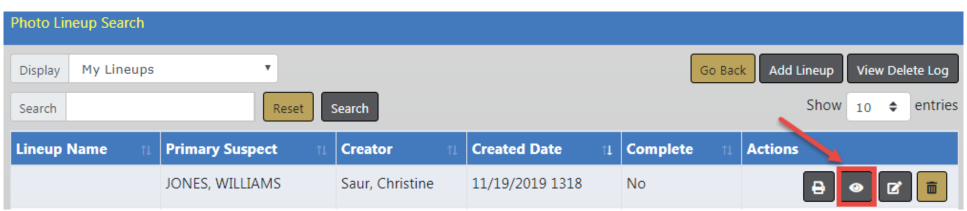


When an icon does not display, then that action is not available to you. For example, if you do not see the *Edit* icon, then you cannot edit that particular **Lineup**.

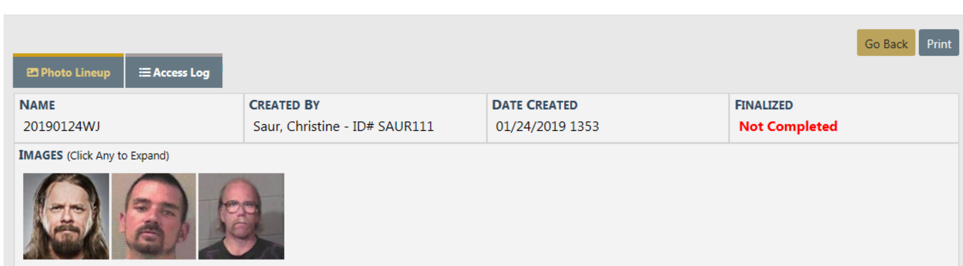
Note: Click the *Print* icon on the Lineup that appears in the search result grid, or print Lineups from other areas of the **Photo Lineup** module. For more information on printing refer to "Print Photo Lineup" on the previous page.

View

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



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

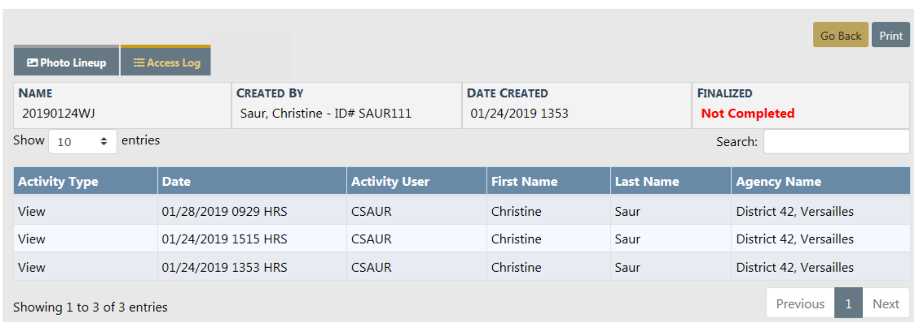


Enlarge an Image

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

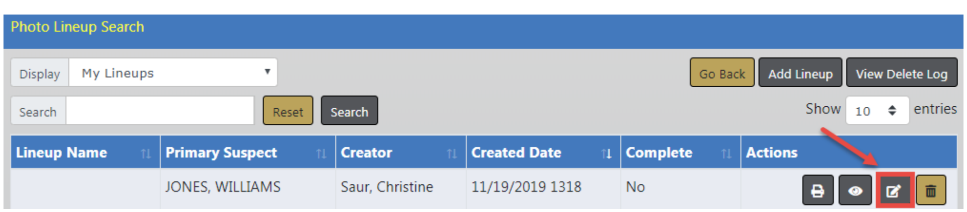
View the Access Log

Click on the **Access Log** tab to view who accessed the **Lineup**. For more information refer to "Access Log" on page 152.



Edit

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



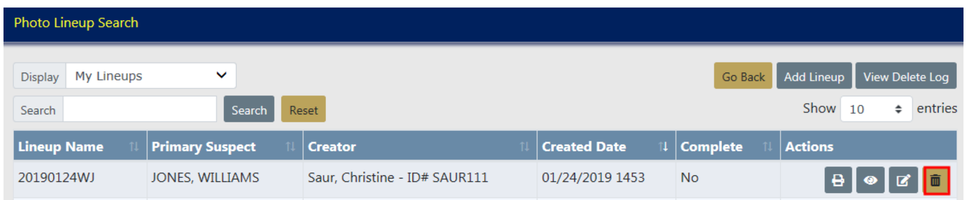
2. Make the necessary changes to the **Lineup** page. *Editing* and *Creating* **Lineups** share the same functionality; therefore, refer to "Create Photo Lineup" on page 140 for more information.

3. Click the **Save** button when finished.

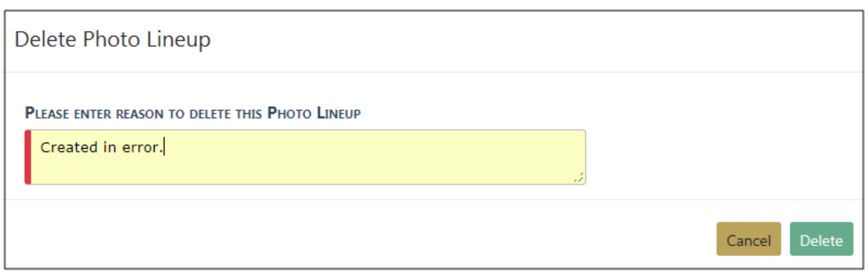
4. Click **Go Back** on the upper right of the window to return to the search results grid.

Delete

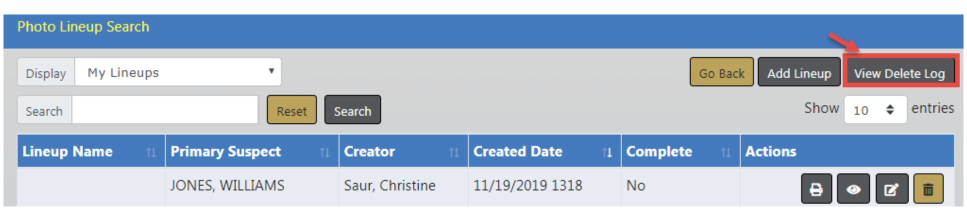
1. Click the *Delete* icon on the **Lineup** that appears in the search results grid.



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



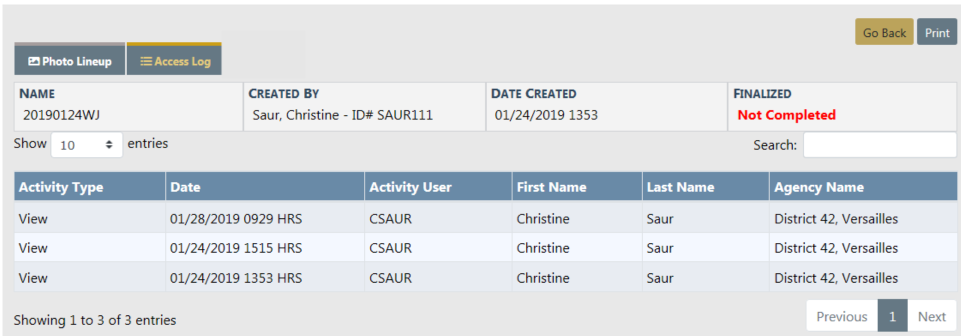
3. Deleted **Lineups** are logged with high-level information such as the agency, suspect, the person who deleted them and why. Click the **View Delete Log** button to view a list of deleted **Lineups**. For more information refer to "Delete Log" on the next page.



Access Log

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

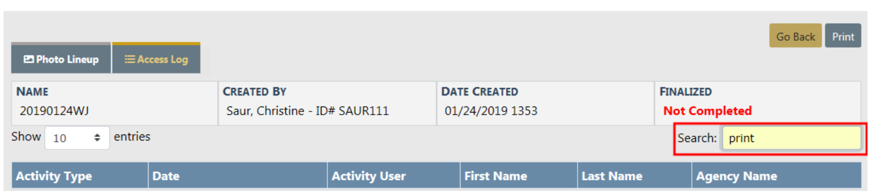
1. Click on the **Access Log** tab to view the **Lineup** activity.



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

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

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

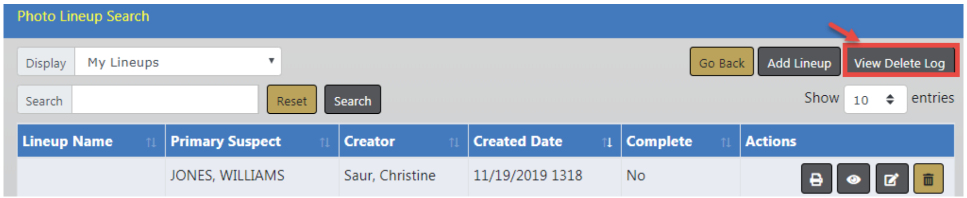


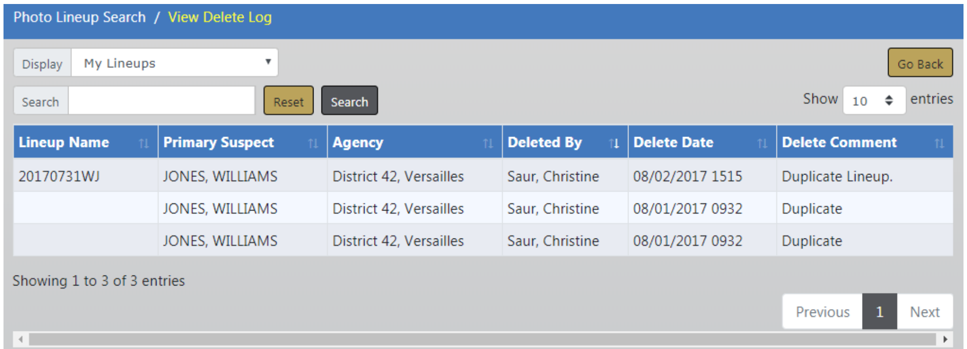
2. Click the **Go Back** button to return to the **Search** results grid.

Delete Log

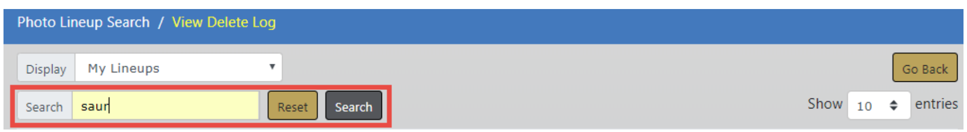
Deleted Lineups are logged and viewable. The log contains high-level information such as the agency, suspect, who deleted the Lineup and why, and the date it was removed.

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





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



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

Chapter 10. Crime Visualization Tool

Crime Visualization Tool Overview

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

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

Organizations

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

People

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

People (relationships)

Custom Forms

Vehicles

People

Incidents

Field Contacts

Custom Forms

Gangs

Field Contacts

People

Associated Gangs

Addresses

People

Organizations

Incidents

Field Contacts

Custom Forms

Phone Numbers

People

Organizations

Field Contacts

People

Incidents

Gangs

Vehicles

Addresses

Incidents

People

Organizations (Victims, Other Names)

Vehicles

Addresses

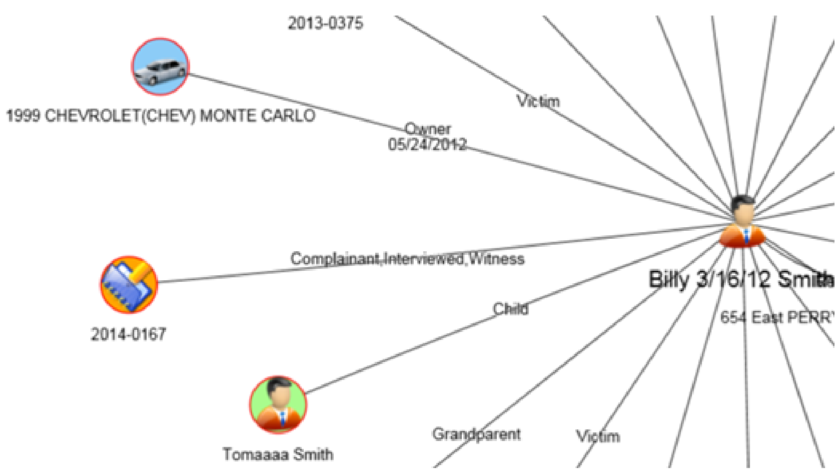
Field Contacts

Spider Chart

The **Crime Visualization Tool** that generates the **Spider Chart** is accessible from various pages of Online RMS such as Incident Summary, Persons, etc., by clicking on the **Visualization Tool** button or other method, depending on the Online RMS page. For more information on accessing the **Crime Visualization Tool** refer to "Access Points" on page 165.

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

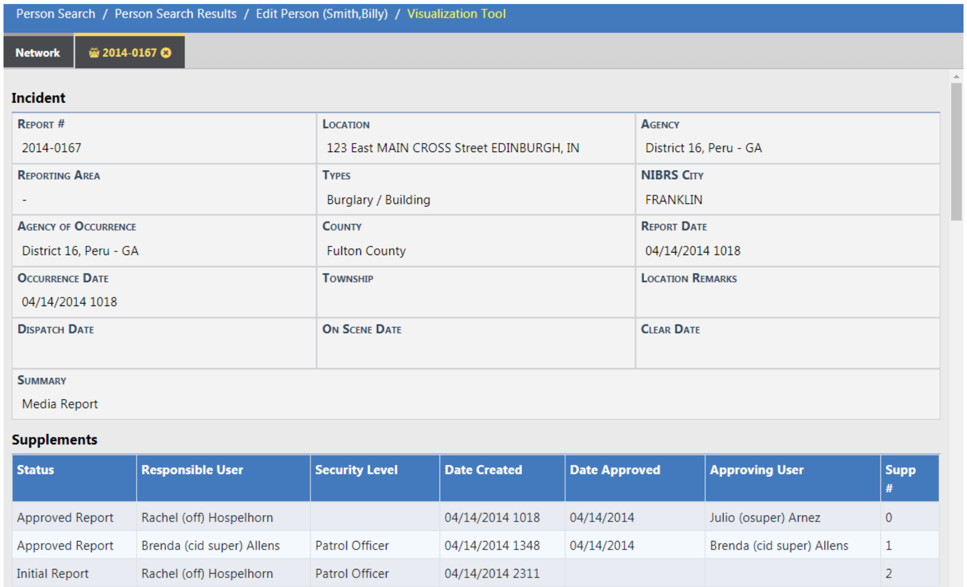
A closer view of the same chart shows the associated label to each **Element**, such as Grand-parent, Victim, Child, etc.



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

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

Open in Viewer


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

Network | 2014-0167

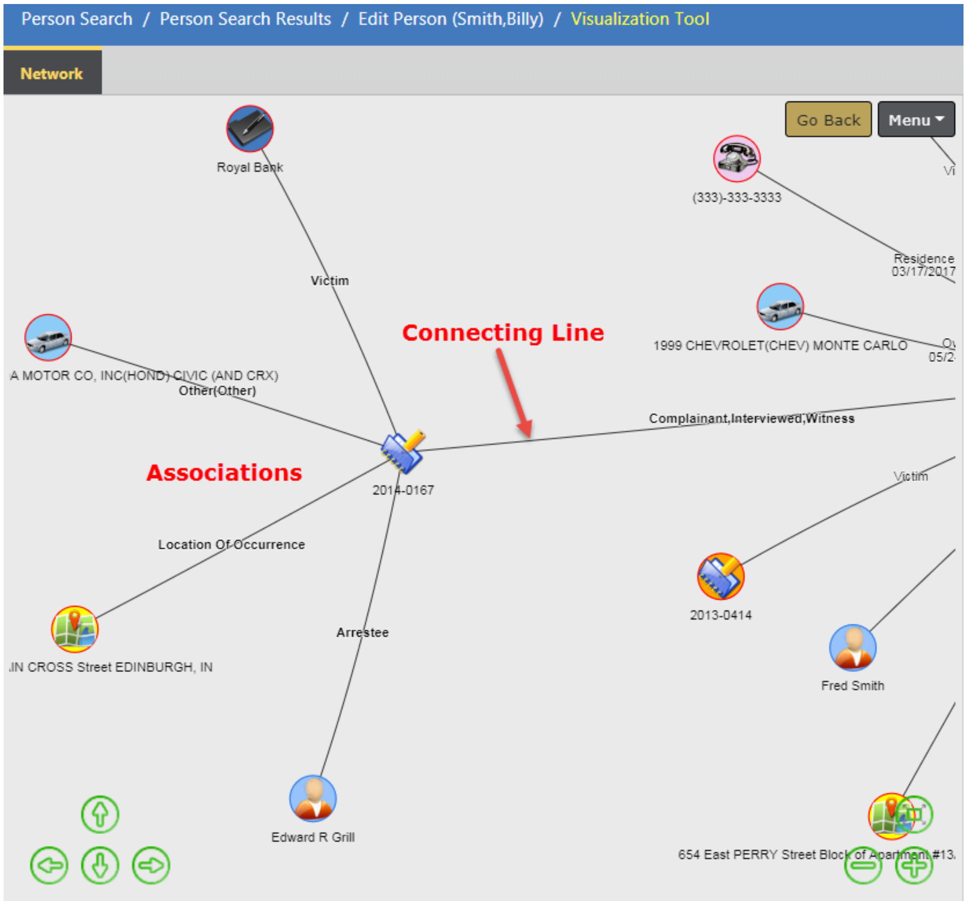
Incident

Report # 2014-0167	Location 123 East MAIN CROSS Street EDINBURGH, IN	Agency District 16, Peru - GA
Reporting Area -	Types Burglary / Building	NIBRS City FRANKLIN
Agency of Occurrence District 16, Peru - GA	County Fulton County	Report Date 04/14/2014 1018
Occurrence Date 04/14/2014 1018	Township	Location Remarks
Dispatch Date	On Scene Date	Clear Date
Summary Media Report		

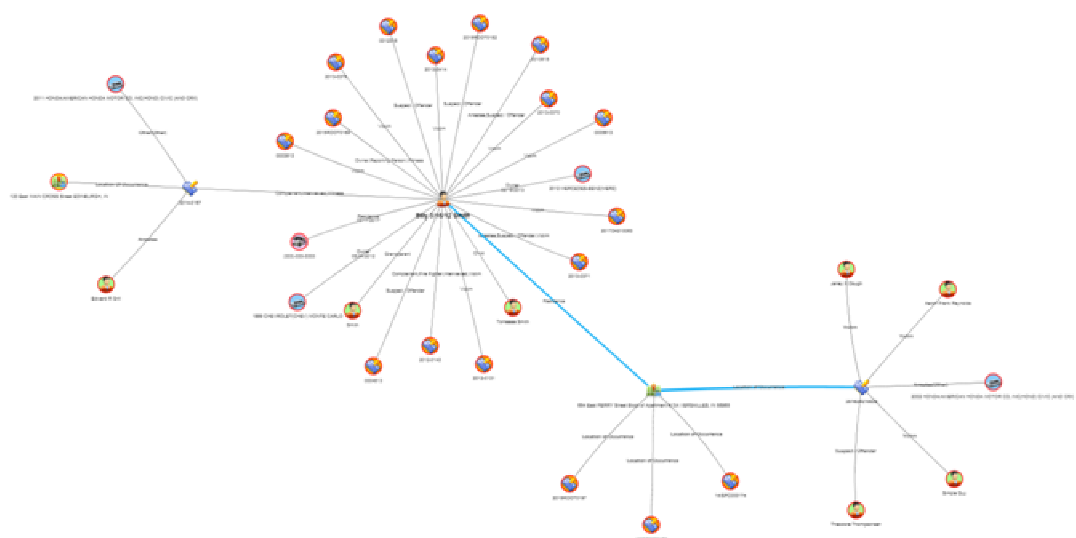
Supplements

Status	Responsible User	Security Level	Date Created	Date Approved	Approving User	Supp #
Approved Report	Rachel (off) Hospelhorn		04/14/2014 1018	04/14/2014	Julio (osuper) Arnez	0
Approved Report	Brenda (cid super) Allens	Patrol Officer	04/14/2014 1348	04/14/2014	Brenda (cid super) Allens	1
Initial Report	Rachel (off) Hospelhorn	Patrol Officer	04/14/2014 2311			2

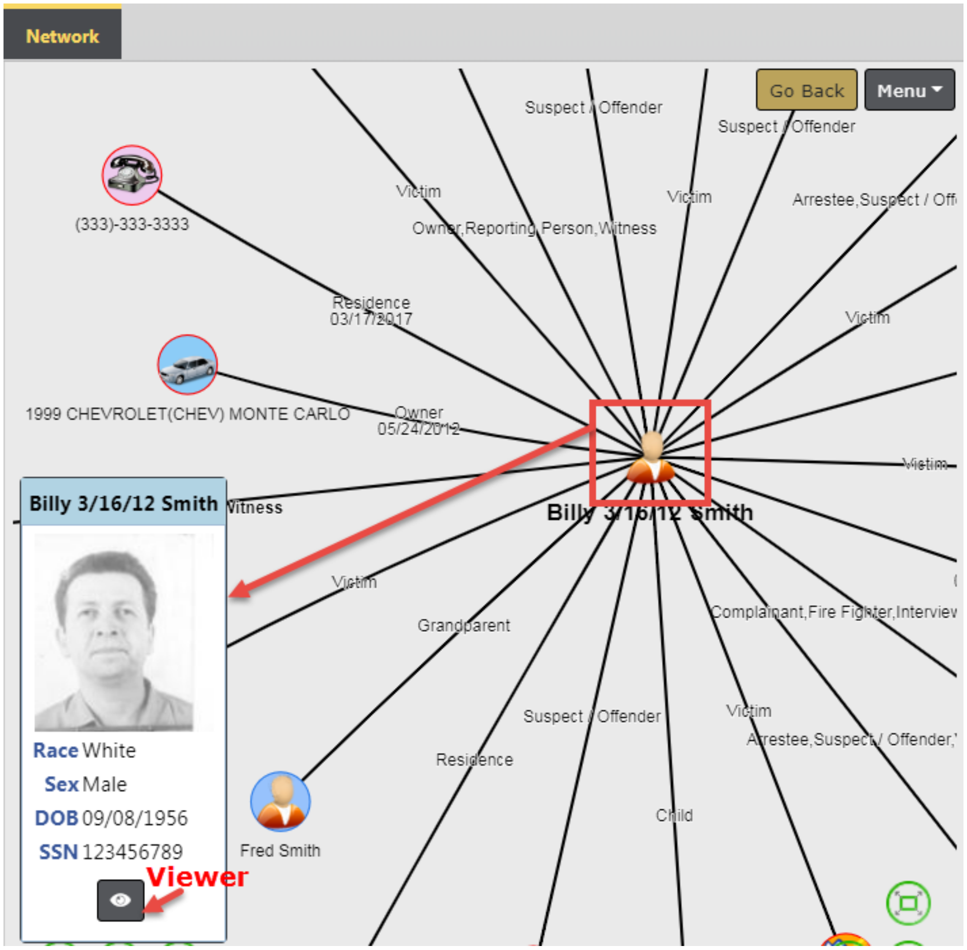
Load Associated Data



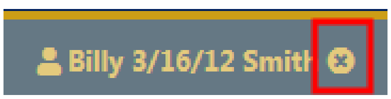
Open and expand associations to multiple **Elements**, and at multiple levels.



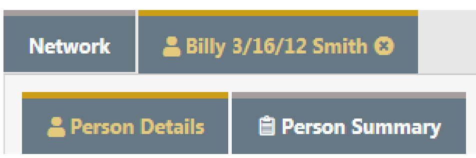
The record from which you accessed the **Crime Visualization Tool** displays as the center **Element** in the **Spider Chart**. The above chart generated from *Persons* for Billy Smith. Click on the *Billy Smith* **Element** to display a box with a link to additional information, then click **Open in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



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



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



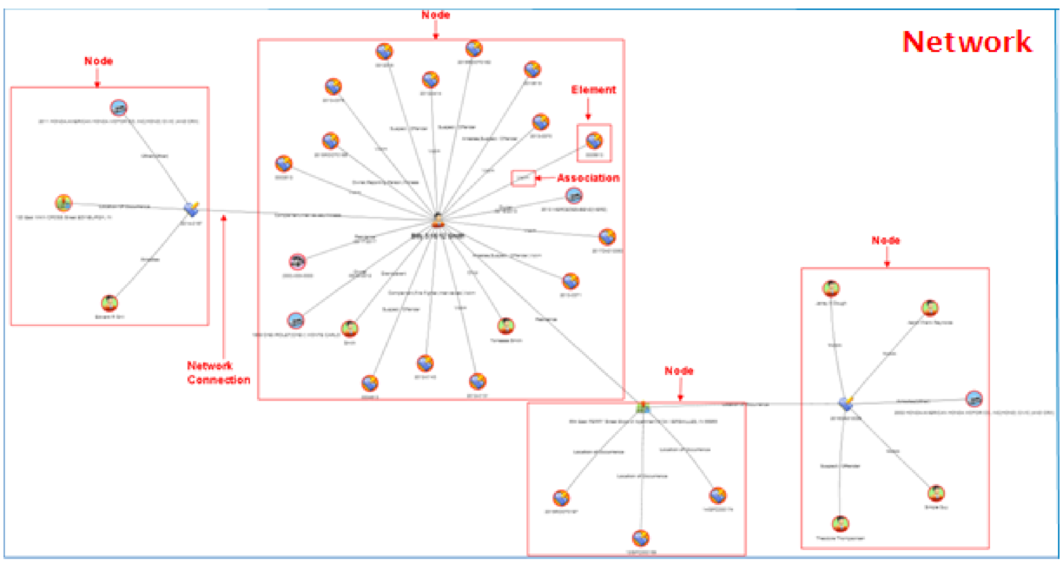
Spider Chart Components

Structure and Terminology

The Spider Chart consists of several components:

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

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



Manually Re-size the Chart

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

Mouse

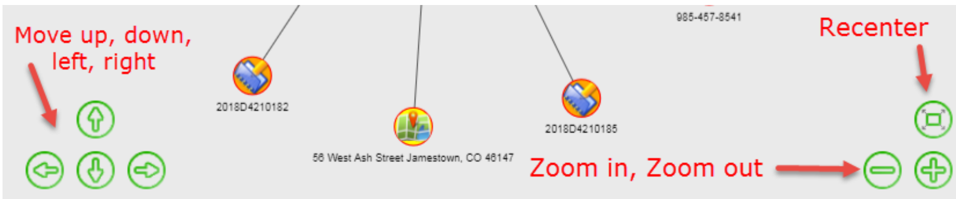
Click anywhere on the chart then move the mouse wheel away from you to enlarge the image on the screen, or move the mouse wheel toward you to decrease the size of the image.

Keyboard

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

Resizing Icons

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

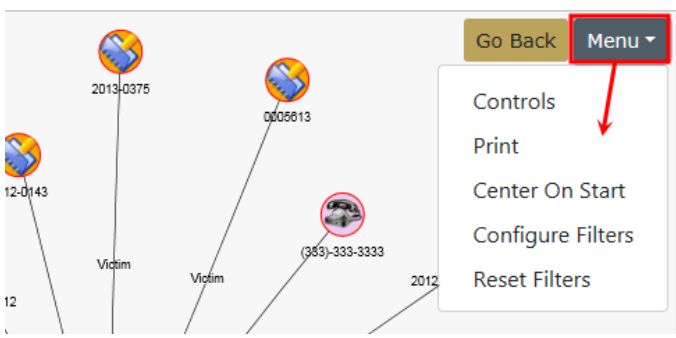


Manually Reposition the Chart

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

Re-Center and Filter the Chart

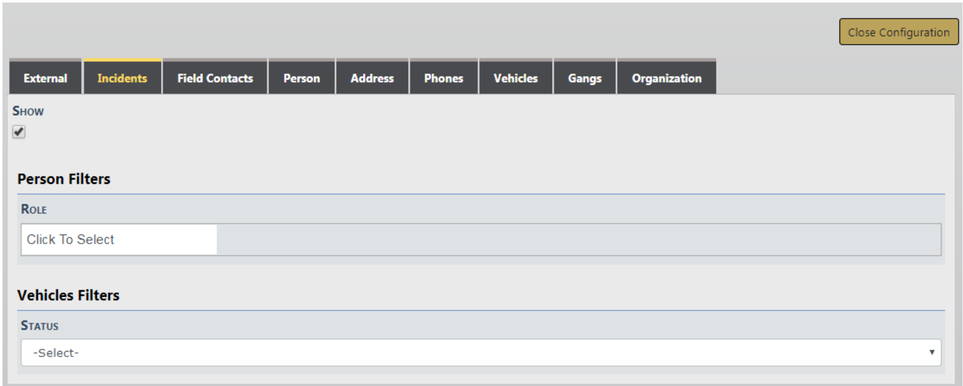
Click on the **Menu** button on the top right to re-center the chart and include or exclude filters, print, and set controls.



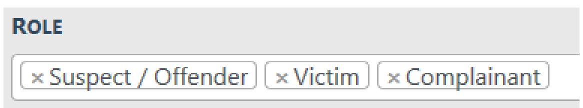
Center on Start

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

Configure Filters



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



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

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

Reset Filters

- Clears any Filters applied and redraws the chart.

Access Points

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

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

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

- Organization, Person, Address, Vehicle, and Gang.

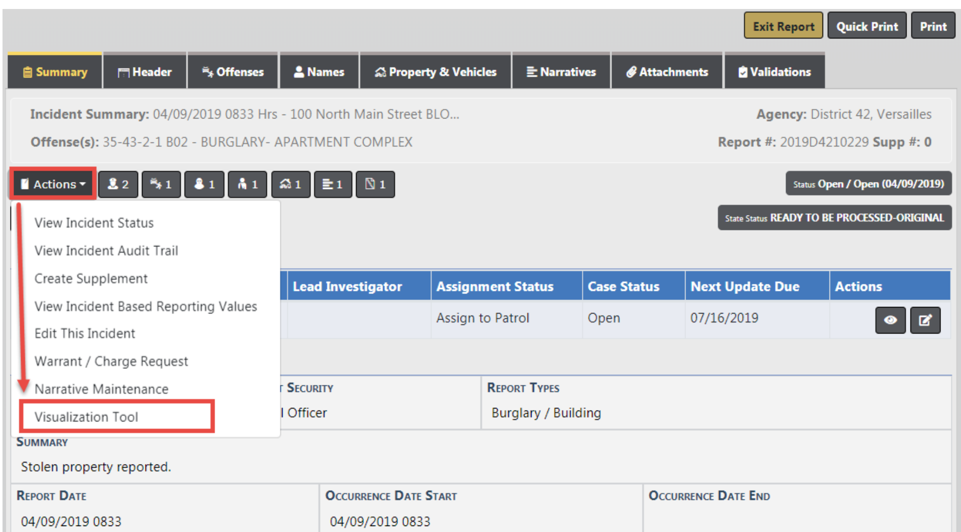
- Field Contacts, in both *View* and *Edit* modes.

Incident Report

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

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

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



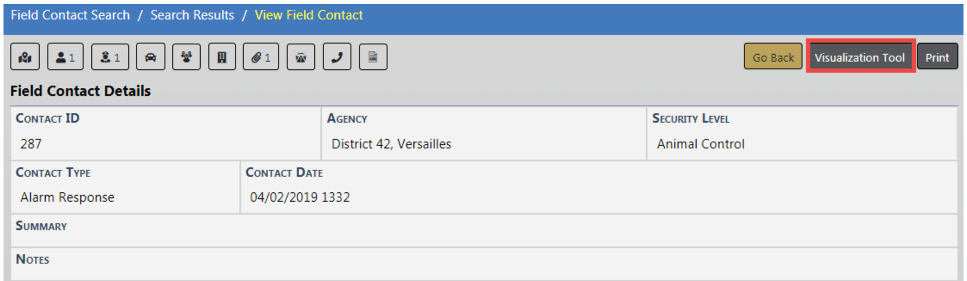
The **Spider Chart** will open with the **Incident Report** as the center **Element**. For more information on **Spider Chart** refer to "Spider Chart" on page 157.

Field Contact

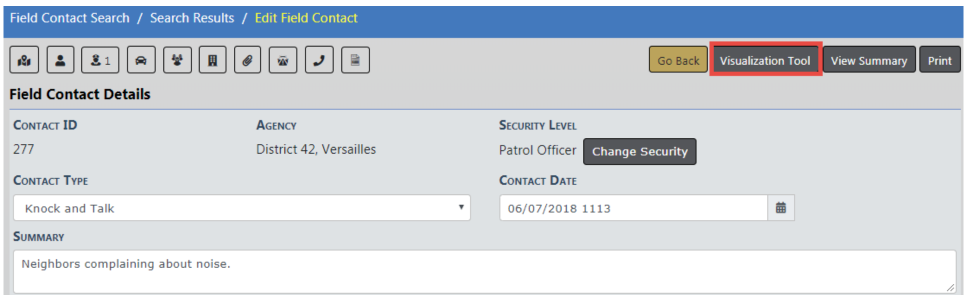
The **Crime Visualization Tool** is currently accessible from the Online RMS **Field Contact** page in both the View and Edit modes, for users with the *Crime Visualization Tool Role*.

For more information on **Field Contacts**, refer to "Field Contacts" on page 407

View Mode



Edit Mode



The **Visualization Tool** displays a **Spider Chart** with the center **Element** as the record you are on, along with lines leading to its associated records. For example, the center **Element** would be the record in the above example. For more information on **Spider Chart** refer to "Spider Chart" on page 157.

Master Indices Detail Pages

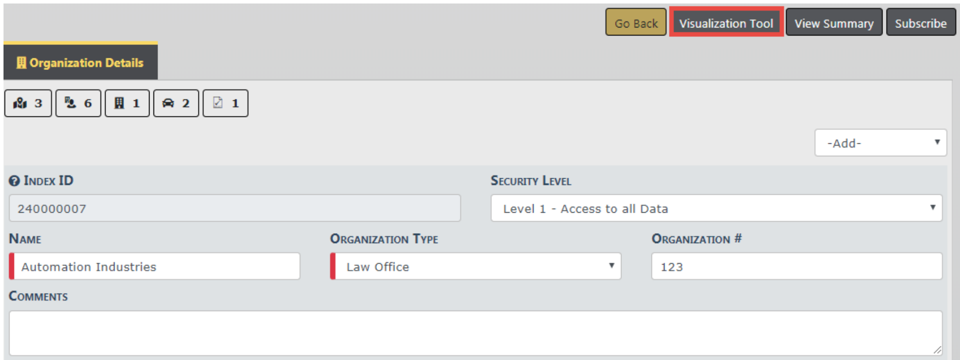
The **Crime Visualization Tool** is currently accessible from the Online RMS **Master Indices** detail pages in both the *View* and *Edit* modes, for users with the *Crime Visualization Tool Role*.

For more information on **Master Indices**, refer to "Master Indices" on page 83.

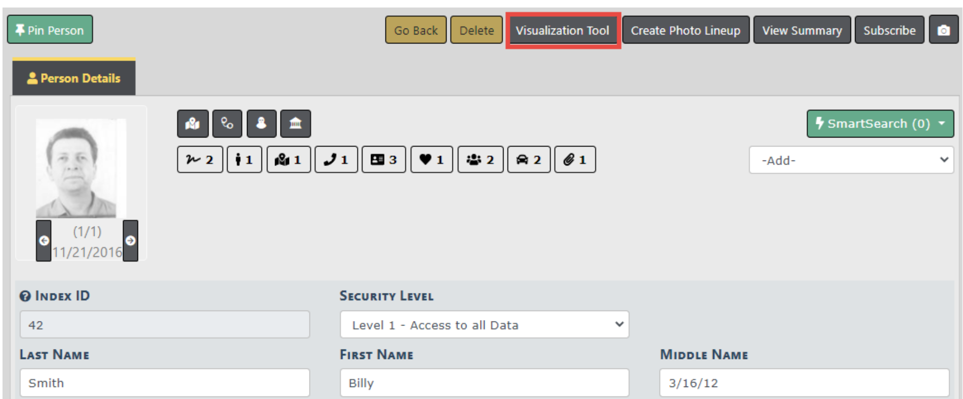
The **Visualization Tool** displays a **Spider Chart** with the center **Element** as the record you are on, along with lines leading to its associated records. For example, if you open the tool from Billy Smith's Person record, the center **Element** is Billy Smith. For more information on **Spider Chart** refer to "Spider Chart" on page 157.

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

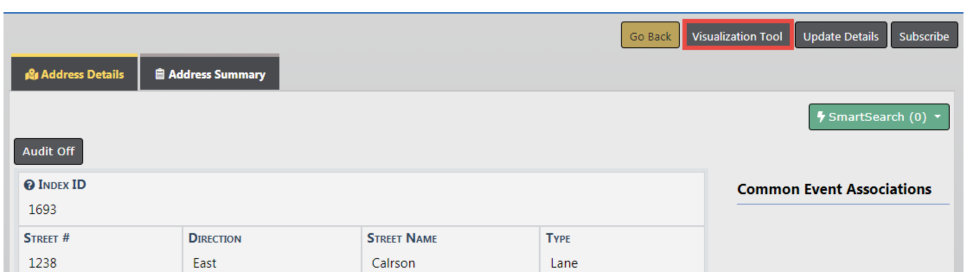
Organization



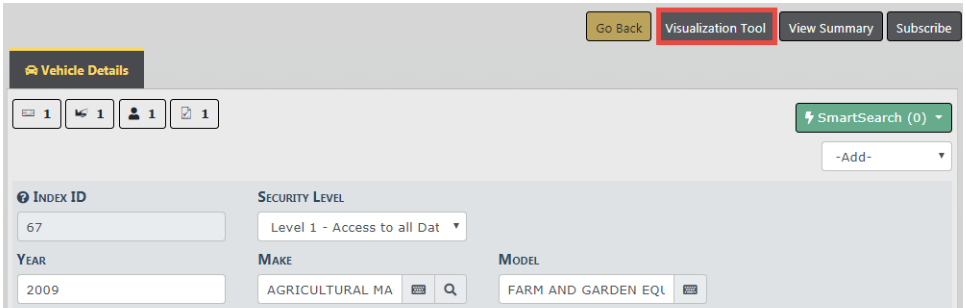
Person



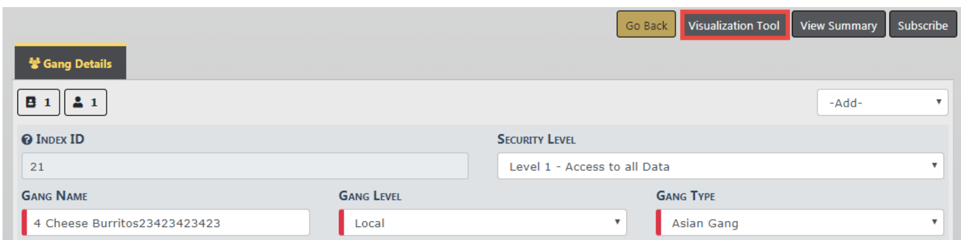
Address



Vehicle



Gang



Chapter 11. Calls for Service

Calls For Service Overview

Track and Document Calls

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

Enhanced Integration from Caliber CAD

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

Integration to Online RMS include the following 11.8 enhancements:

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

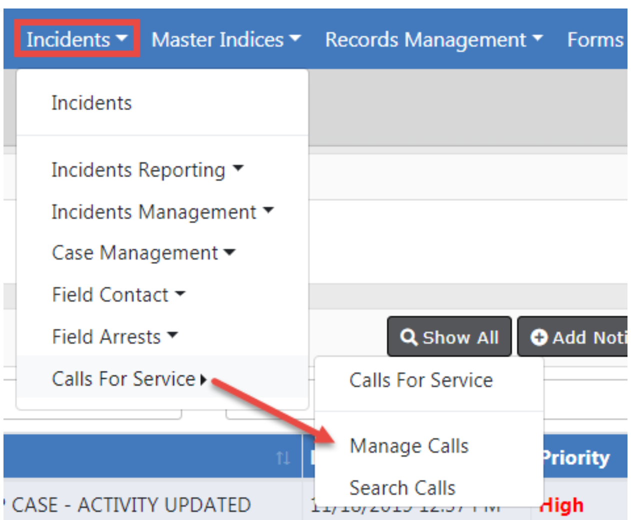
Create Field Arrest and Import Call Data

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

For details, refer to "Create Field Arrest and Import Data" on page 365.

Access Calls For Service

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



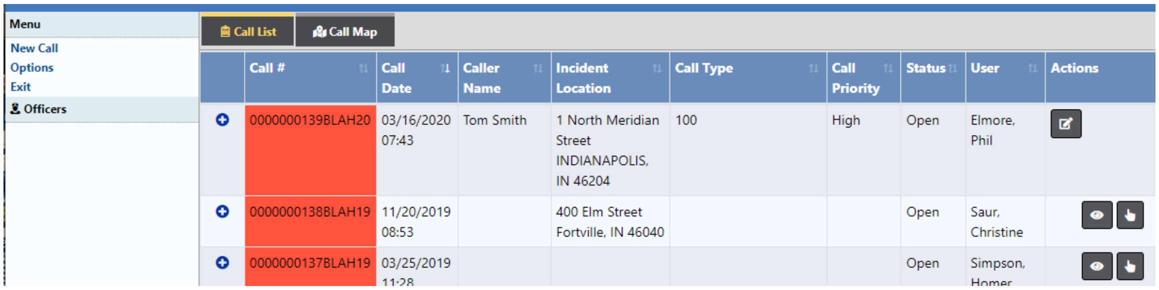
To create, edit, or view calls, refer to "Manage Calls for Service" below.

To search calls refer, to "Search Calls for Service" on page 183.

Manage Calls for Service

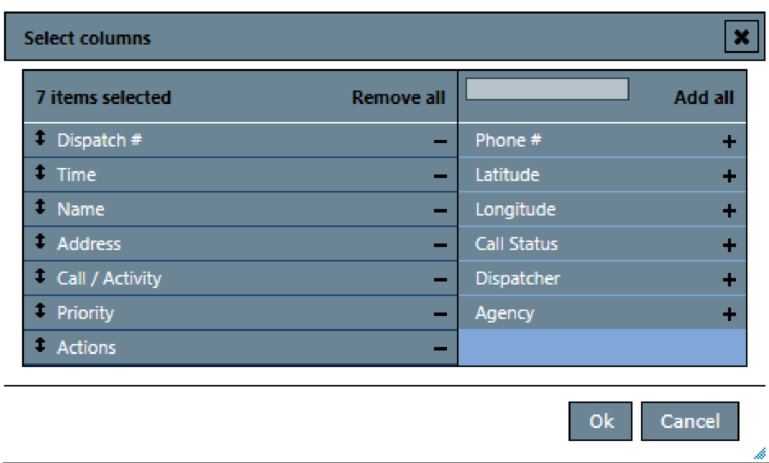
You can create, edit, view calls by selecting the Calls For Service **Manage Calls** sub-menu. For details, refer to "Calls For Service Overview" on the previous page .

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

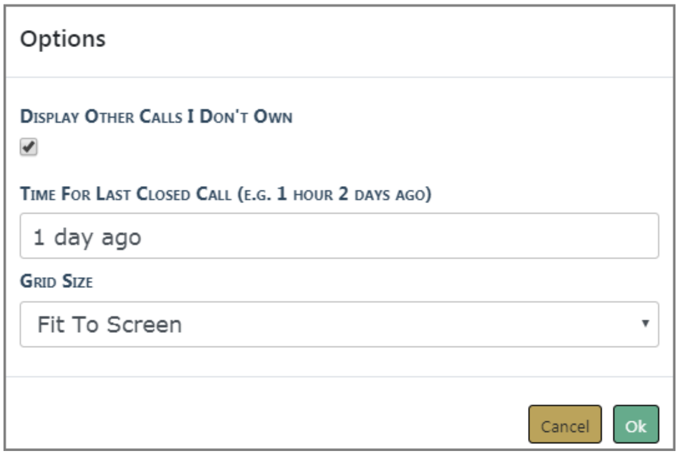


Using the Columns and Options buttons at the bottom of the screen, you can configure how the Call List displays.

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



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



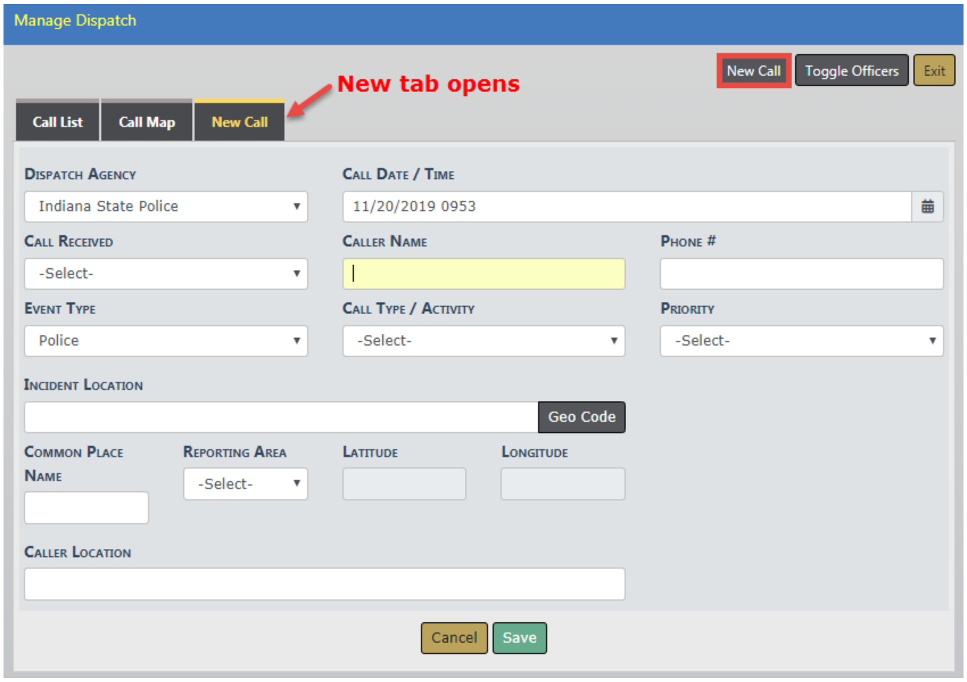
From the **Calls for Service** screen the Officer or Dispatcher has the ability to initiate a New Call, edit or view a call, Toggle Officers, Show Map, and Exit.

Initiate New Call

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

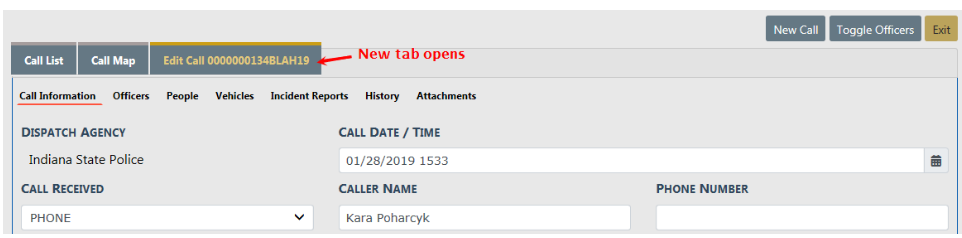
For more information on how to access the Manage Calls For Service menu option, refer to "Manage Calls for Service" on page 172.

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



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

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



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

Edit a Call

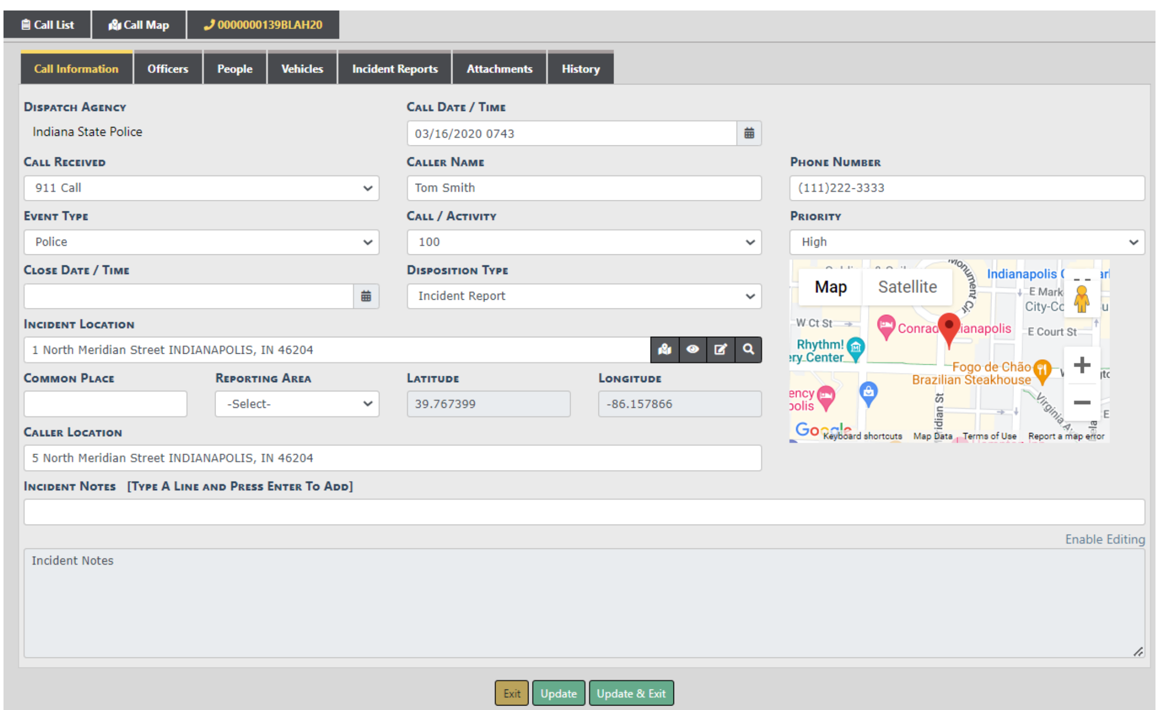
Once the call is initiated, dispatch information such as time and place is available. For more information on initiating a call, refer to "Initiate New Call" on the previous page.

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

The Officer/Dispatcher has the ability to add any additional Incident Notes. You can return to the call later to finish your edits by accessing the *Manage Call For Service* sub-menu option. For more information on accessing the *Manage Call For Service* sub-menu, refer to "Manage Calls for Service" on page 172.

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

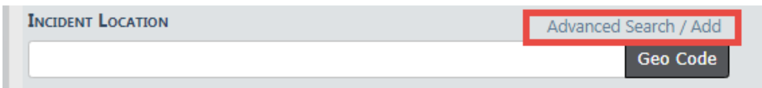
- Call Information with the caller name and the phone number. This tab opens by default.
- Officers tab for adding officers to the call.
- People tab for adding involved persons.
- Vehicle tab for adding involved vehicles.
- Incident Reports tab for creating a new incident from the call and assigning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



Call Information Tab

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

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



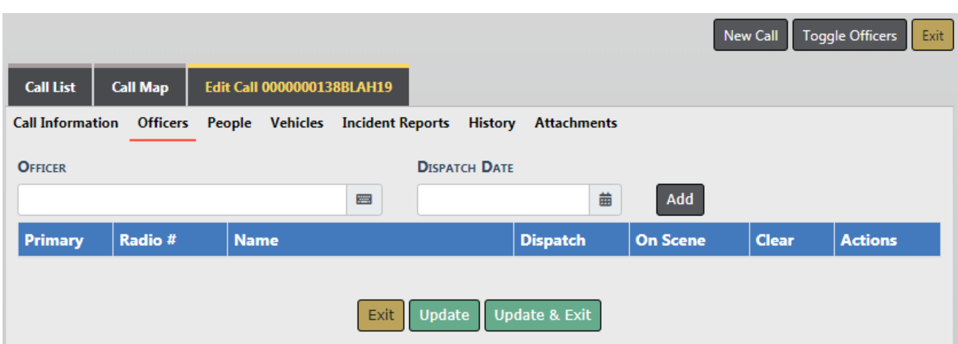
When the address record is added to the CFS record, a **View Address** link appears above the location. Click on the link to view the Master Index record.

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

To close a call, enter the Close Date/Time and select a Disposition from this drop-down list. For more information on closing a call refer to "Close a Call" on page 183.

Officers Tab

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



People Tab

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

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

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

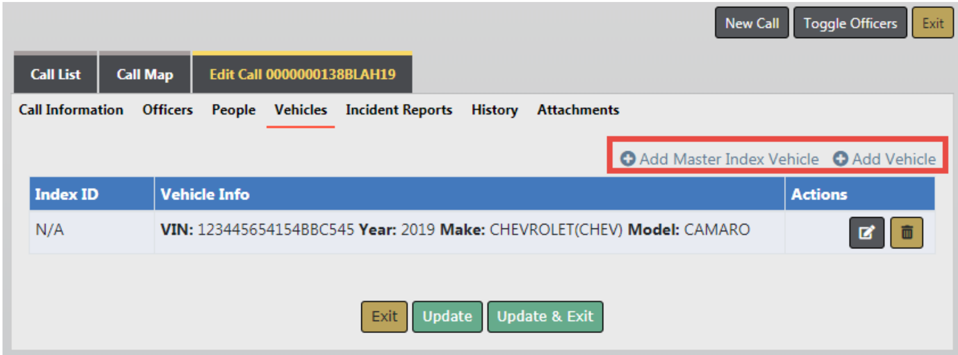
If the person record appears in the results list, click the **Hand** icon in the *Actions* columns to select it and add it to the call. If the person record does not appear in the results list, then click the **Add Person** link on the *Person Search Results* screen to create the *Master Person Index*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

> **Note**: For more information on searching, selecting, and creating *Master Person Index* records refer to "Master Indices" on page 83.

Vehicles Tab

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

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



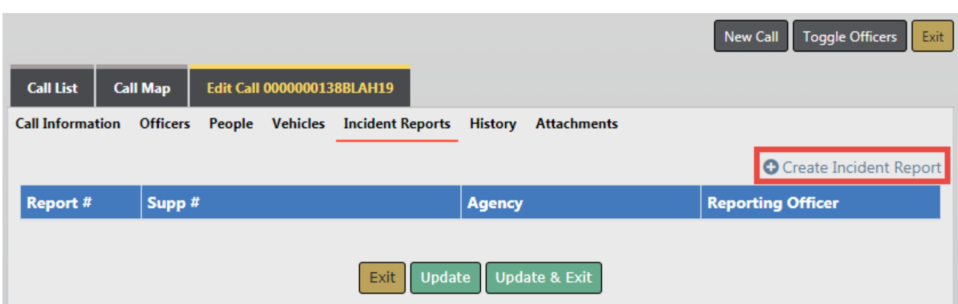
Click on **Add Master Index Vehicle** to first search for the vehicle. The *Master Index Search* screen for vehicle appears. Enter the information you want to search on and click the **Search** button to view a list of vehicle records that match your search criteria.

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

Note: For more information on searching, selecting, and creating *Master Vehicle Index* records refer to "Master Indices" on page 83.

Incident Reports Tab

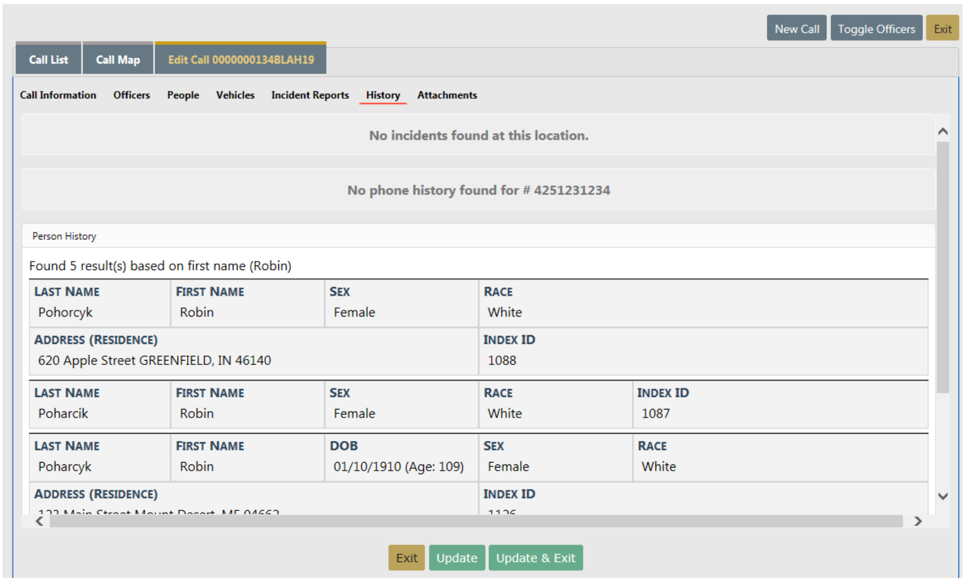
The next sub-tab is the **Incident Reports** tab. Most agencies that are using CFS within Online RMS, or a CAD product, will have the Create Incident Report permission turned off at officer level, and make all incident reports start from CFS or CAD. In CFS under the *Incident Reports* tab you will see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



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

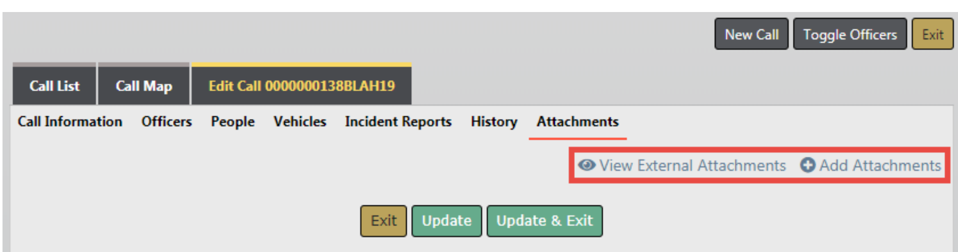
History Tab

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



Attachments Tab

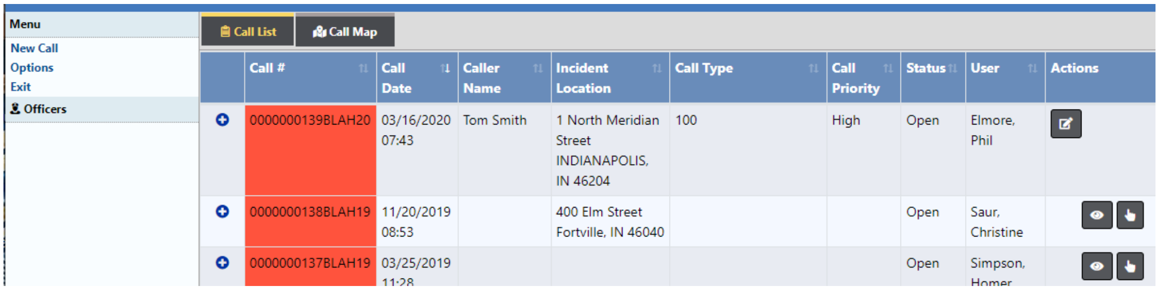
The **Attachments** tab allows you to attach photo and document files to the call record.



Note: For more information on adding **Attachments** refer to "Attachments" on page 69.

Call List

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



Edit, Take, View Calls

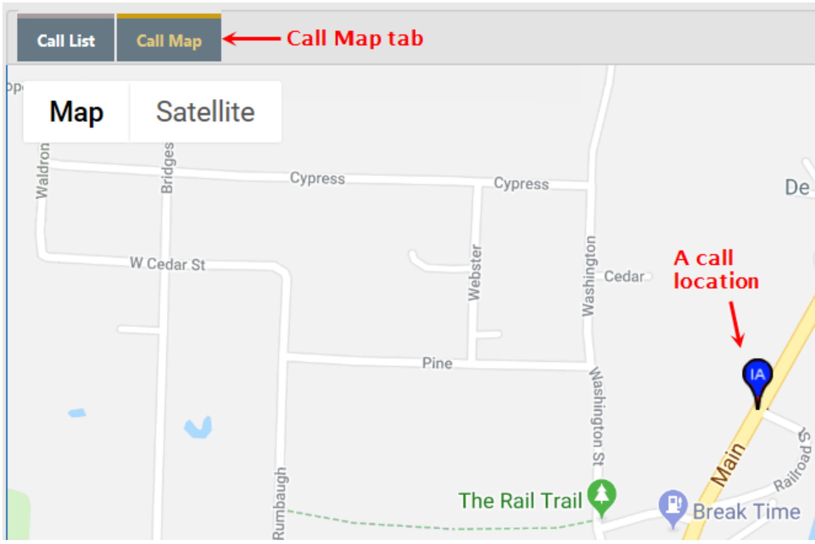
Under the *Actions* column you can edit, take, or view calls.

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

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

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

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

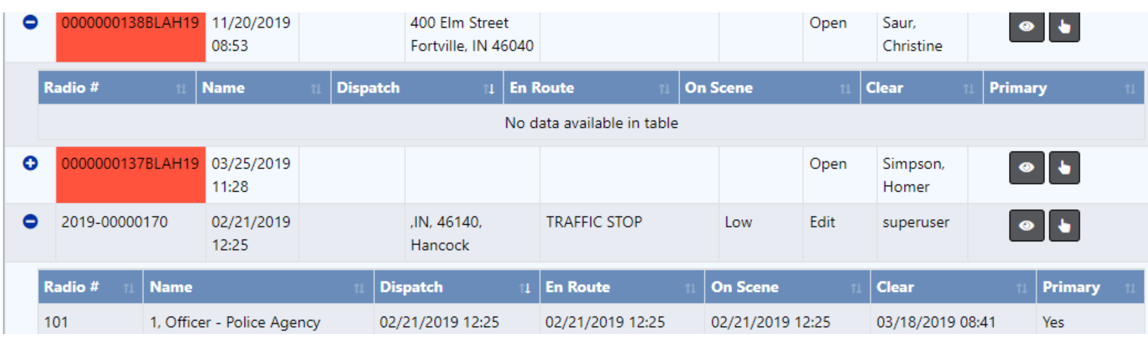


Clear, Dispatch, or Mark Call as OnScene

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

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

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



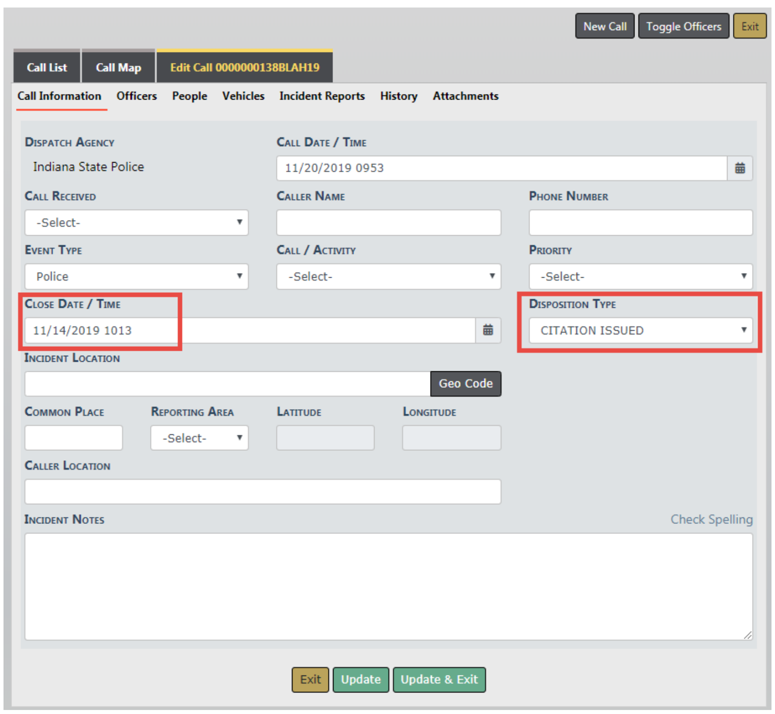
Click the **Dispatch** button to dispatch the officer, click **On Scene** to mark the officer as on the scene, or click **Clear** to clear the call. The current date and time replaces the button on the screen.

Close a Call

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

To close the call, add the clear time, clear date, and disposition on the Edit call tab of the *Manage Dispatch* form. For more information on accessing the *Manage Dispatch* form, refer to "Manage Calls for Service" on page 172.

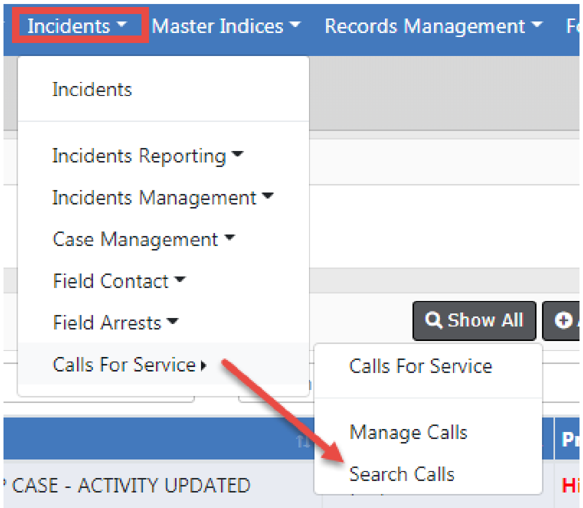
> **Note**: The **Clear** time/date on the *Call List* is not the same as the **Close** time and date. Closing a call also requires a disposition of the call. For more information about the *Call List*, refer to "Call List" on page 181.



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

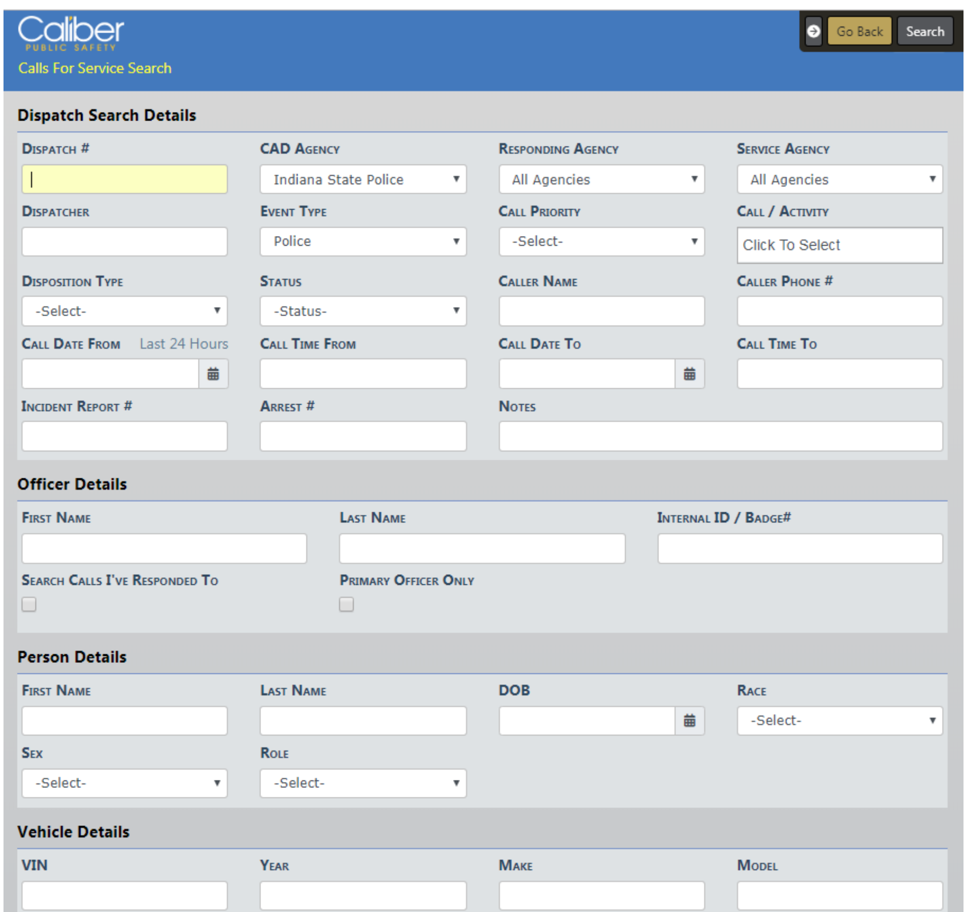
Search Calls for Service

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



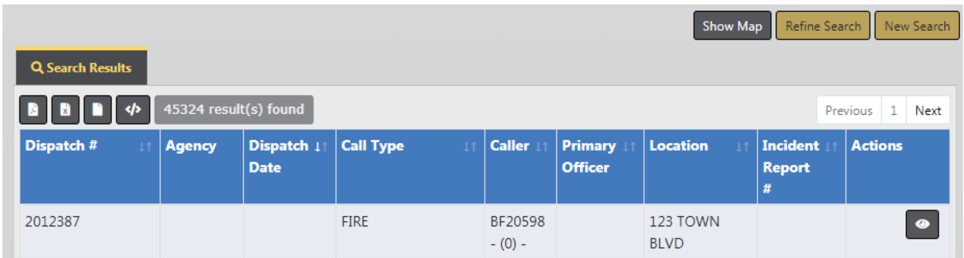
After selecting the **Search Calls** option on the sub-menu, a *Calls for ServiceSearch* screen appears.

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



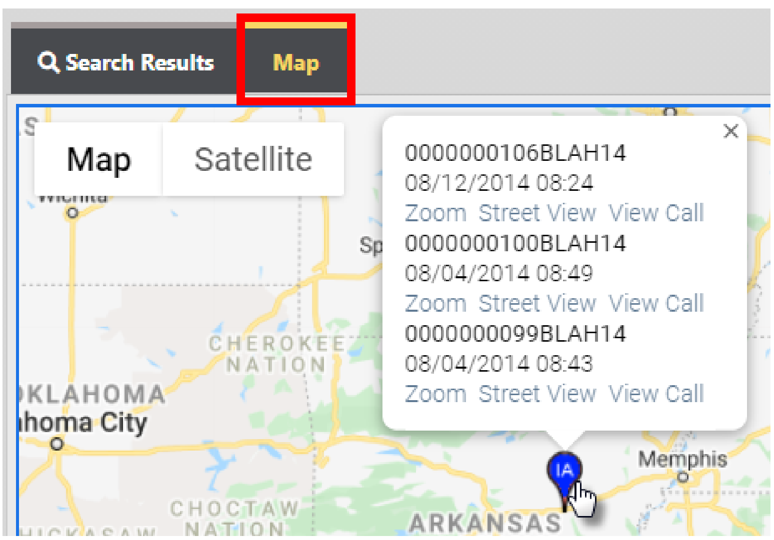
Note: Enter the Officer Name or Badge Number in the **Officer Details** section to only include calls based on the primary officer assigned.

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

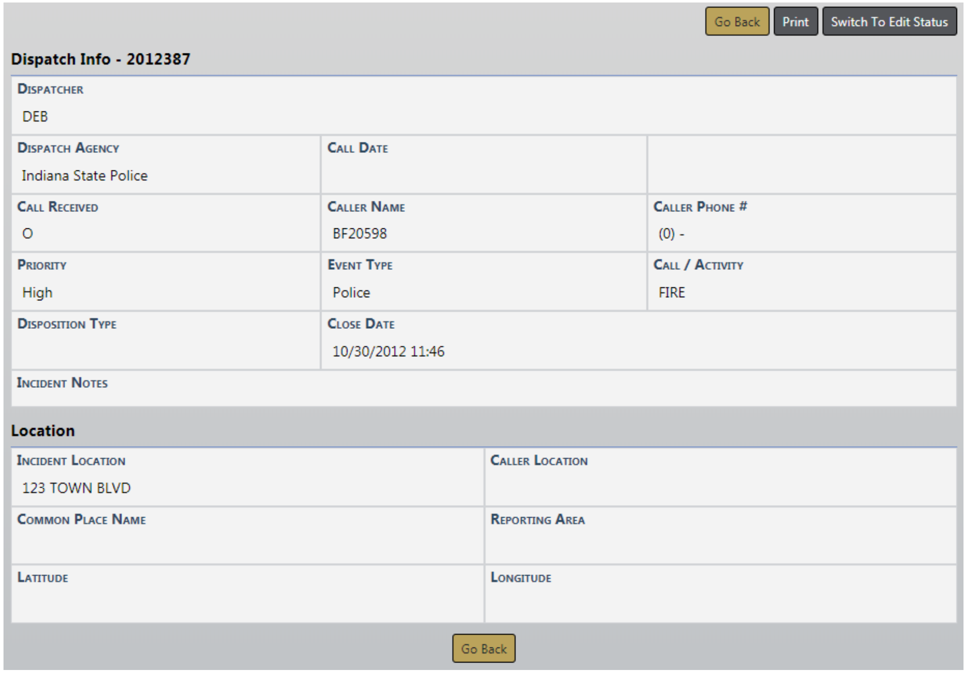


Select the **Show Map** button to open a new tab displaying the current search results on a map.

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



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

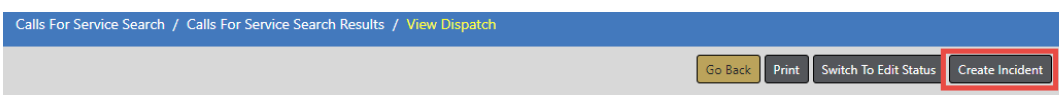


Scroll down to view additional call details.

Click the **Print** button to print.

If applicable, click the **Switch to Edit Status** to edit the call. For more information on editing a call, refer to "Edit a Call" on page 175.

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



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

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

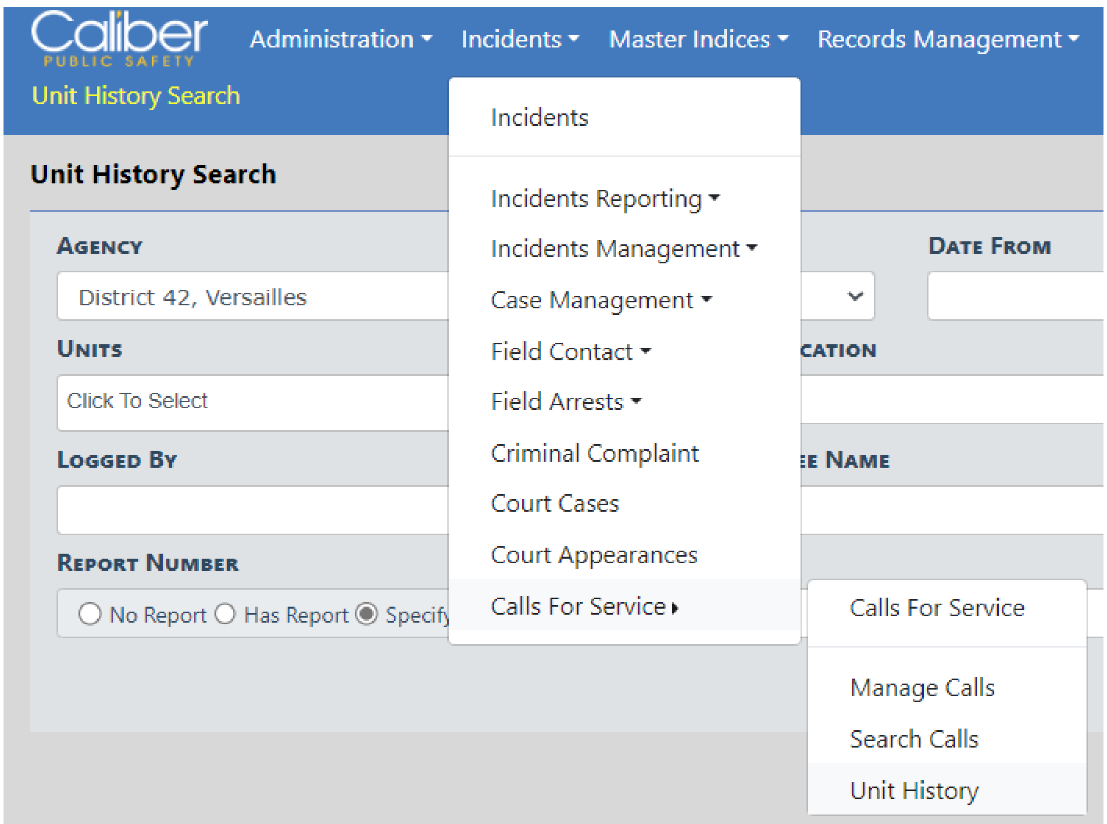
Click the **Create Incident** button to create the Incident Report.

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

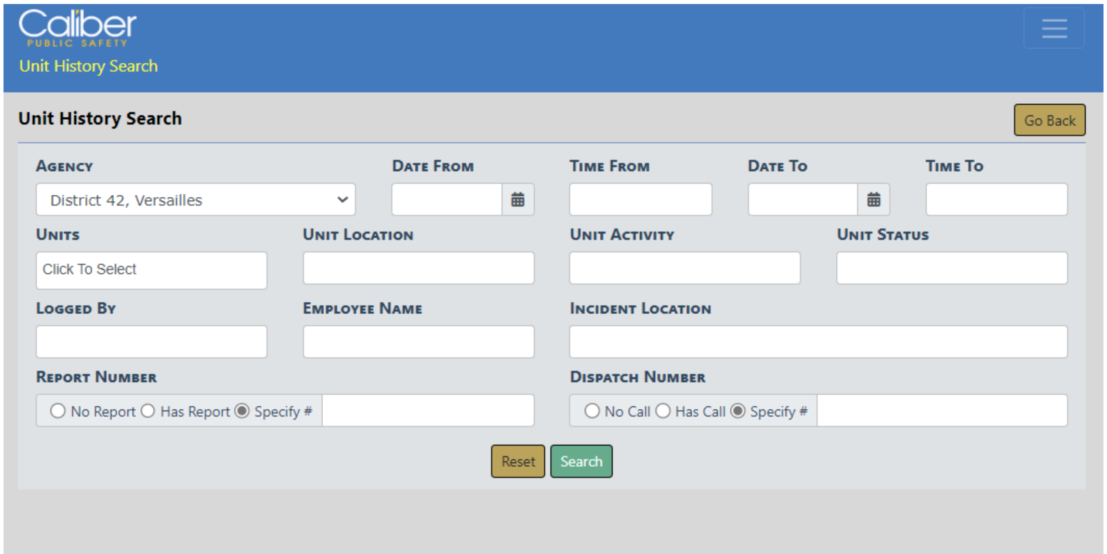
Note: Warrant information displays only if your agency is using the **Warrants** module.

Search Calls for Service by Unit History

If the feature is enabled, you can also search calls for service by Unit History by selecting Incidents from the top navigation bar, Calls For Service, then **Unit History** option on the sub-menu.



To search using unit history, enter data in the fields shown, where applicable, and select **Search** to return results.


Caliber PUBLIC SAFETY
Unit History Search
Unit History Search
Go Back
Agency
District 42, Versailles
Date From
Time From
Date To
Time To
Units
Click To Select
Unit Location
Unit Activity
Unit Status
Logged By
Employee Name
Incident Location
Report Number
No Report Has Report Specify #
Dispatch Number
No Call Has Call Specify #
Reset
Search

Chapter 12. Incidents

Incidents Overview

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

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

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

> **Note**: If the CFS module and integration is turned on, and the integration process cannot match people that exist on the CFS record with RMS, the unmatched names appear on the Names tab of the Incident Report. With appropriate permissions, you have the option to add unmatched people to the Master Index in RMS, then associate them with the Incident Report. For details, refer to "Names Tab" on page 218.

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

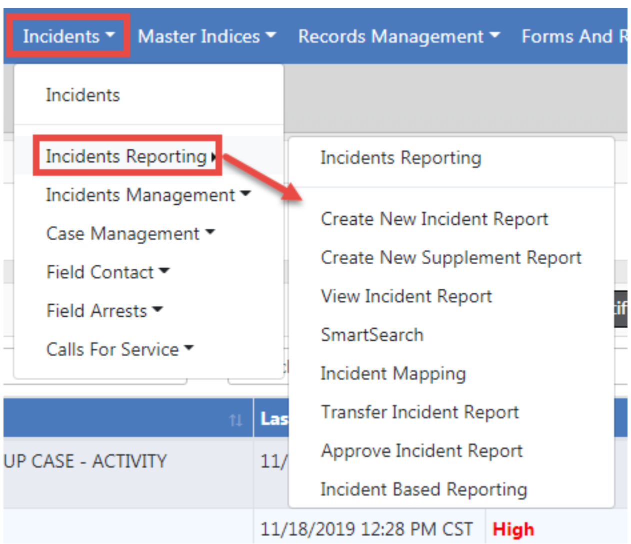
> **Note:** The *Wizard* leads you through each section of the incident report to help you fulfill the system requirements for a valid incident report. The *Wizard* can be turned on and off, but you should leave it on to help ensure that you complete required information. This practice helps to prevent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

  - Create Supplement to Incident Report
  - View Incident Report

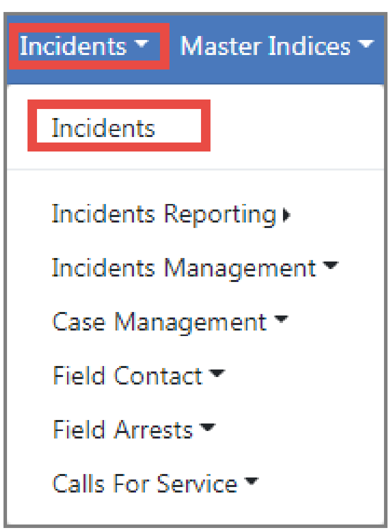
> **Note**: With appropriate permissions, investigators can create a case on an initial unapproved Incident to begin working on an investigation without waiting for Incident approval. Refer to "Create a Follow-Up Case" on page 459 for details.

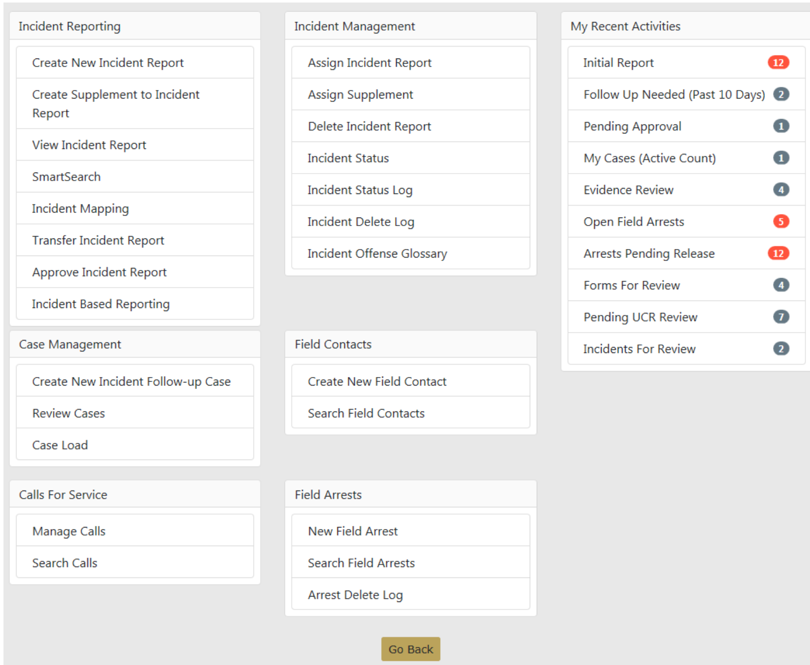
- SmartSearch
- Incident Mapping
- Transfer Incident Report
- Approve Incident Report. (Available with proper permissions.)
- Incident Based Reporting (Available with proper permissions.)

• You can access these features from the Incident Reporting sub-menus. Click **Incidents** on the top navigation bar, then click the **Incident Reporting** to display more options from which you can select.



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

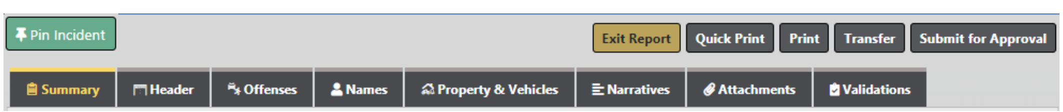




Note: Items that appear are based on permissions and vary by user.

Top Buttons

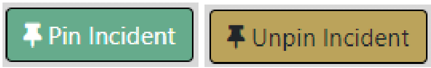
The **Incident Report** contains various buttons that enable the user to *Pin Incident*, *Exit Report*, *Quick Print*, *Print*, *Transfer* the report to a different user, *Show* or *Exit* the *Wizard*. The *Submit for Approval* button remains inactive (gray) until the components of the report are completed appropriately and the report is ready for review by an officer supervisor or CID supervisor.



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

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

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



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

For more information on pinned records that appear on the Home Page, refer to "Home Page - Prior to RMS 11.12" on page 8.

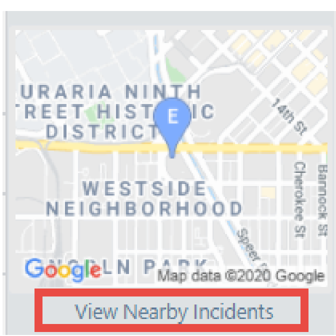
Google Maps Integration

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

Report Location

Address	Latitude	Longitude
1770 Block of Lincoln Denver, CO 80104	39.739577	-104.999408
Reporting Area	**Incident NIBRS City**	**Incident Location Remarks**
	CANNELTON	
Common Place Name	**Campus Code**	
	Off Campus	
Geographic Location	**County of Occurrence**	**Township of Occurrence**
District 42, Versailles	Hancock	

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



Incident Report – Requirements And Rules

General Requirements:

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

- Report/Occurrence Dates and Times

- Report Location
- Reporting Officer
- Narrative

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

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

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

Cross-tab Validations:

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

For example, suppose your state has particular IBR reporting guidelines requiring you to supply specific Incident Offender data when the victim is older than 17. Then, with help from Caliber staff, your agency can add a validation rule to a custom field on the Incident Offender tab requiring the user to supply that information when the victim is older than 17.

Incident Rules:

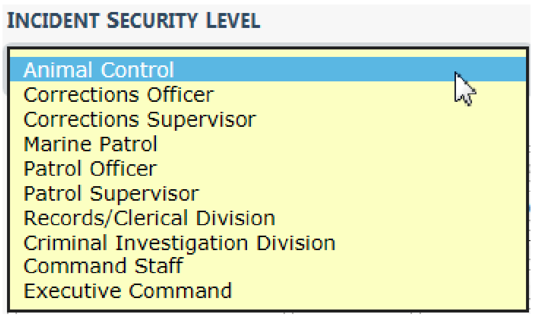
- The Initial Report is designated as “Supp# 0” and Supplements are then added in sequential order (e.g., Supp. # 1, 2, 3, etc.).
- A user can submit another report owner's Incident.
- Incidents can be edited when in *Initial* or *Disapproved* status, otherwise will result in a Supplement.
- Incidents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

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

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

Incident Security

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



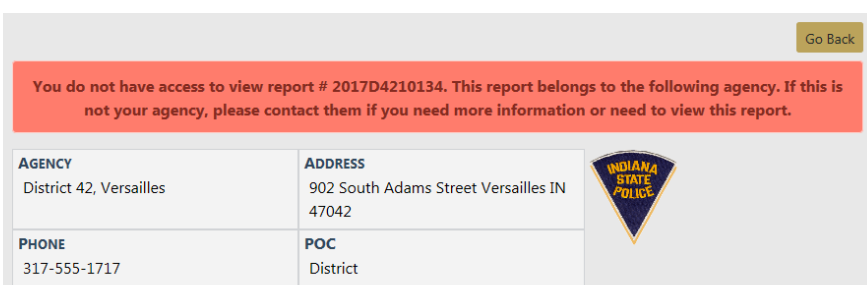
Incident Security applies to each individual Incident Supplement. In addition to the security level, there are also security control to restrict to *Agency Only* and for *Security Groups*.

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

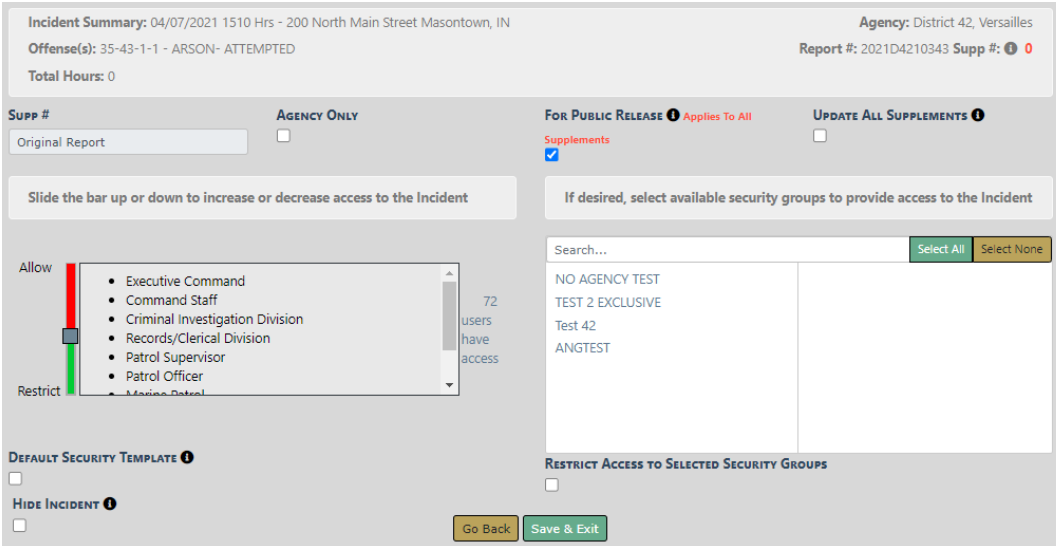
- View Incident Supplements having a security level of *Patrol Officer* or less.
- Cannot view Incident Supplements having a security level greater than *Patrol Officer*, unless the user is added to a security group assigned to the Incident Report.

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

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

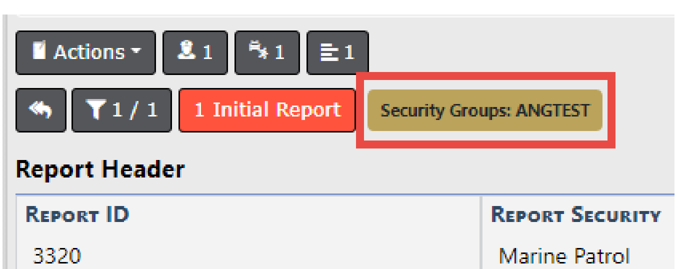


The security of an Incident Report can be set by clicking on **Change Security** button from the **Incident Approve/Disapprove** screen when supervisors approve the supplement.



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

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

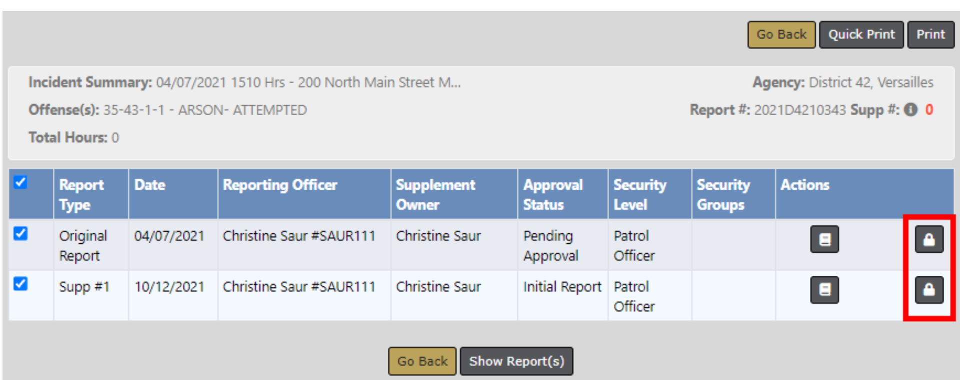


- *Default Security Template* - This option allows the user to set one supplement as the default security template. All future supplements added to the Incident inherit the same security level.
  - When the Hide Incident box is selected, the Default Security Template box will automatically be selected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

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

  - Hidden Incidents do not appear in searches, nor in other Online RMS modules that lists associated incidents, such as field arrest, warrants, visualization tool, citations, field contacts, evidence, etc., unless the user meets security requirements as stated above.
  - When you check the **Hide Incident** box, the **Update All Supplements** checkbox is automatically checked and disabled to ensure the security on all supplements are identical.

The **Incident Security** screen can also be accessed at any time through the **Incident Status** screen by clicking on the **Security** icon .

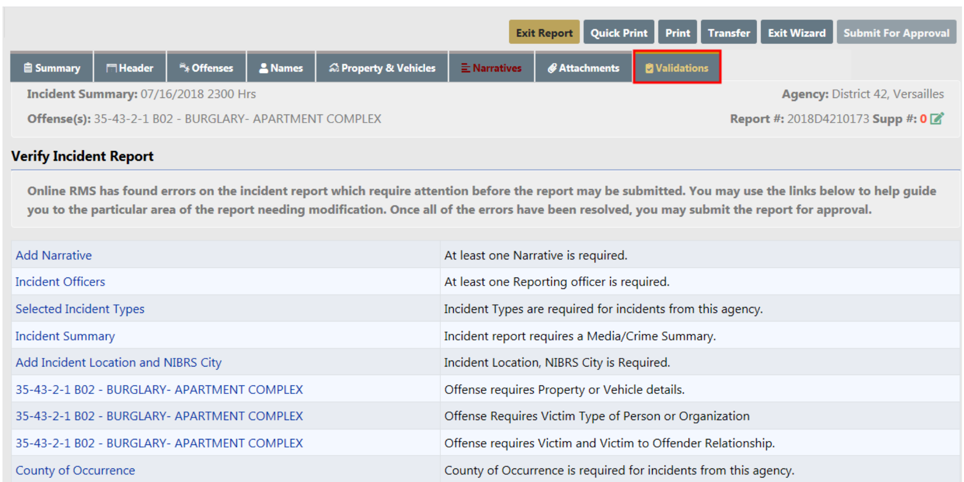


You can access the **Incident Status** screen from the *View Incident Report* screen, or from the *Incident Report* menu. For more information on accessing the *Incident Report* menu, refer to "Incidents Overview" on page 189. For information on changing the Incident Status, refer to "Changing Incident Status" on page 276.

Incident Report – Report Validations

The Online RMS program has a built-in **Wizard** that guides you through the creation of the **Incident Report**. Navigational buttons are displayed to navigate through the report. The use of the Incident **Wizard** is highly recommended.

National Incident-Based Reporting System (NIBRS) validations use tab indicators to assist the user in entering all required information. The required information may change depending on the offense(s) added to the report. A tab that lists NIBRS validation information displays on the **Incident Validations** tab.



The **Incident Validations** tab lists any missing required information to assist you. Click on any of the validations listed in **Incident Validations** to return to the area within the report to add or edit data. Once all the minimum required information has been entered, the report can be submitted for approval.

Click the **Exit Wizard** button to view and edit the report in **Form Mode**. This mode allows you to navigate through the necessary tabs in any order without following the linear style used in the **Wizard** mode. Navigating to the **Summary** tab, or clicking on the tabs instead of the navigational buttons, may also cause you to exit the **Wizard** mode. Click the **Show Wizard** button at the top of the page to return to **Wizard** mode.

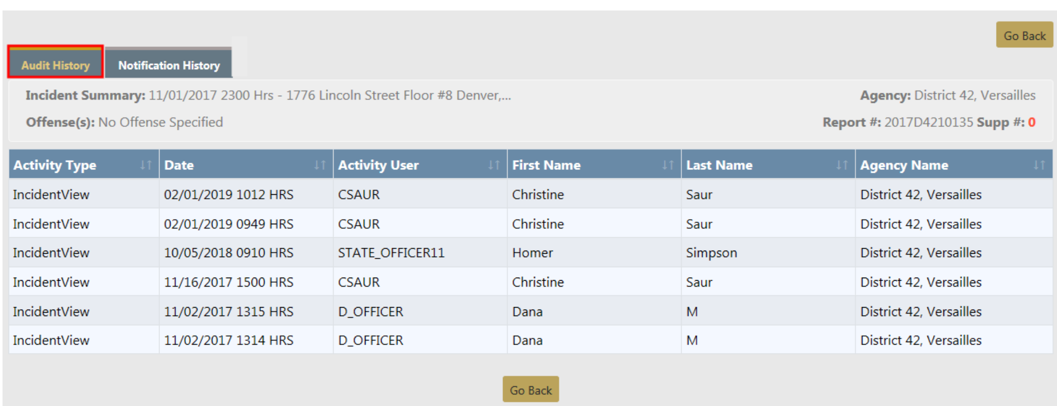
Note: The **Wizard** mode is only available when editing a *Supp 0* incident.

View Incident Audit Trail

Another valuable security tool for the Investigator is the **View Incident Audit Trail** feature. Information is captured anytime someone accesses an incident report. If you suspect another user is accessing or attempting to access an incident report set above their security level, you can view these access attempts.

To view the audit entries, select *View Incident Report*. When the correct report is located and selected, select the **Actions** button, then **View Incident Audit Trail** menu option

Anyone who accesses or attempts to access the Incident Report appears in the Audit History.



Activity Type	Date	Activity User	First Name	Last Name	Agency Name
IncidentView	02/01/2019 1012 HRS	CSAUR	Christine	Saur	District 42, Versailles
IncidentView	02/01/2019 0949 HRS	CSAUR	Christine	Saur	District 42, Versailles
IncidentView	10/05/2018 0910 HRS	STATE_OFFICER11	Homer	Simpson	District 42, Versailles
IncidentView	11/16/2017 1500 HRS	CSAUR	Christine	Saur	District 42, Versailles
IncidentView	11/02/2017 1315 HRS	D_OFFICER	Dana	M	District 42, Versailles
IncidentView	11/02/2017 1314 HRS	D_OFFICER	Dana	M	District 42, Versailles

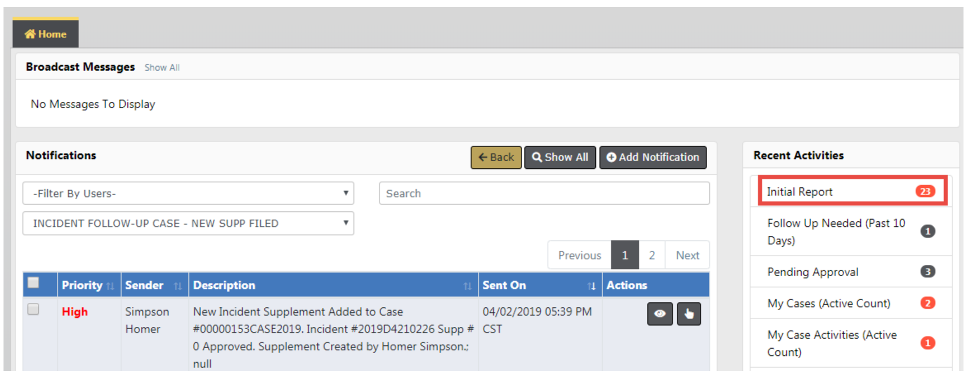
Create Incident Report

The Incidents module is where you input, retrieve, and edit professional law enforcement reports. Create reports step-by-step using the **Incident Report Wizard**. Each report is validated against state or federal guidelines which are driven by any offense(s) entered on the report.

Depending on your agencies configuration, incidents may be created manually or automatically via the **Caliber CAD** interface. Mobile users may also have access to generate a report in CAD using **Caliber Mobile**.

Incident Reports generated by **Caliber CAD**, or other CAD system through a system interface, will contain information generated by CAD or imported through the CAD interface.

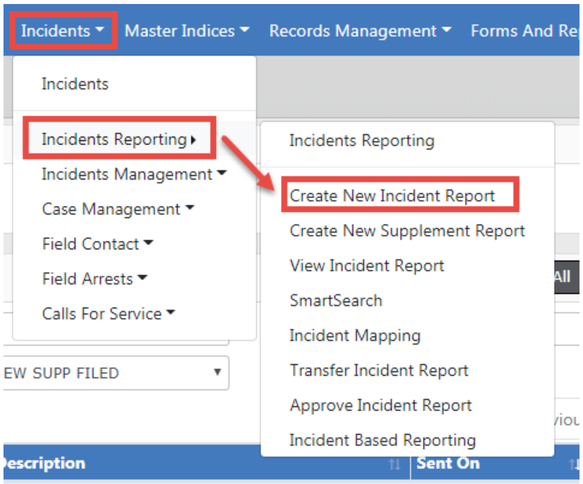
Once logged into Online RMS the Home Page displays. You can edit the CAD generated Incident from the *Recent Activities* section under **Initial Report** by clicking on the number to the right.



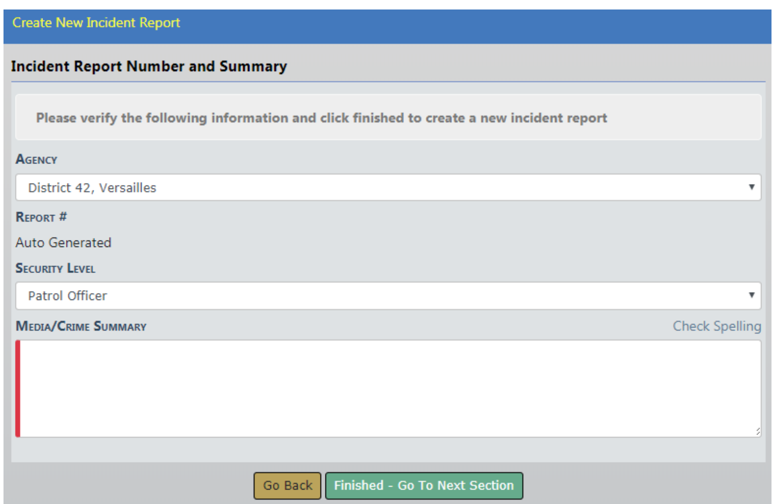
Incident Reports generated by the *Calls For Service* module contain the call dates and times in the **Header** tab. When you log into Online RMS, you can edit the CFS generated Incident from the *Recent Activities* section under **Initial Report**. These calls can be searched using the *Calls for Service* module. The associated call will show in the **Header** and **Summary** tabs of the **Incident Report**.

Incidents created manually by officers will use the following workflow:

The **Create New Incident Report** feature is located in the **Incidents** menu under **Incident Reporting**.



This allows you to create a report using your agency's numbering format. Some agencies will use *Automatic Number Generation* where the Incident report number will be populated automatically, and some agencies will have the opportunity to manually enter the report number based on the agency's business practice.



Select the Security Level, if different than the default.

Enter the Media/Crime Summary, and optionally click *Check Spelling* to validate and correct any spelling errors.

Click **Finished - Go To Next Section**. The wizard steps you through each tab, one at a time.

Incident Report Tabs

- *Summary tab*-provides a summary of all the information entered on an incident report.

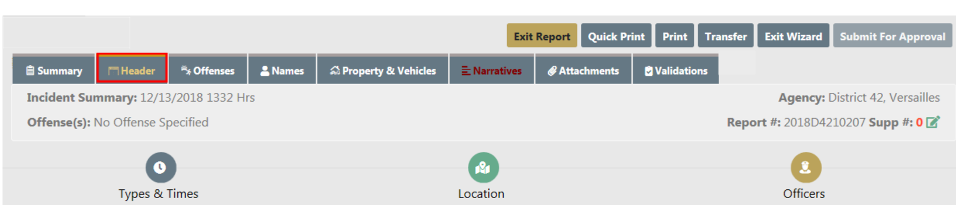
- *Header tab*- captures the dates/times, report location, and reporting officer(s), associated arrests, and associated calls for service for the incident.
- *Offenses tab*-captures any and all offenses associated with the report. Validations are offense driven and will alert the user of necessary information.
- *Names tab*-captures Offenders, Victims, and Other Incident Names such as witnesses who are associated with the report.
- *Property & Vehicles tab*-captures applicable property or vehicles associated with the report. Evidence is also created in this section (See Incident Evidence section for a detailed explanation).
- *Narratives tab*-captures the users narration of the details surrounding the incident. You can insert an image directly into the body of the Narrative.
- *Attachments tab*-captures an incident related attachments such as crime scene photos or statements. Forms such as the Marijuana Eradication Form can be completed in this section also.
- *Validations tab*-does a final check of your report to ensure the minimum requirements are met based on the offense(s) entered on the report.

Note: With appropriate permissions, you can *Pin* the Incident while on the Summary tab to add it to your Home Page for quick reference. For more information, refer to "Incidents Overview" on page 189.

Header Tab

Regardless of which method is used to initiate the report, the following workflow is the same for editing and completing a report; the only difference you may see is pre-populated information from CAD or Calls For Service module.

The **Header Tab** contains 3 separate sections: *Report Types & Times*, *Location*, and *Officer*. By using the **Wizard** the sections are completed in the listed order, though the use of the **Wizard** is not required.



Click on each button to access that information.

Report Types & Times

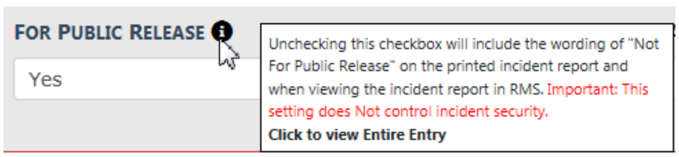
The *Header Information* area includes Report Security, For Public Release, Report Agency/District, the Media / Crime Summary box, Incident Report Types, Report Date, Occurrence Date Start, Incident Classification, and other information.

Report Security

Select the Incident Report security level.

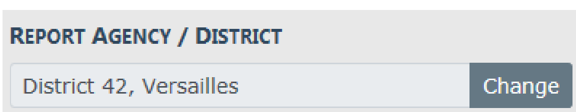
For Public Release

This field defaults to **Yes**. Change this value to **No** if this Incident should not be public. Hover over or click on the information bubble for more information.



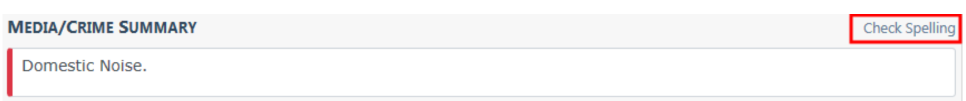
Report Agency/District

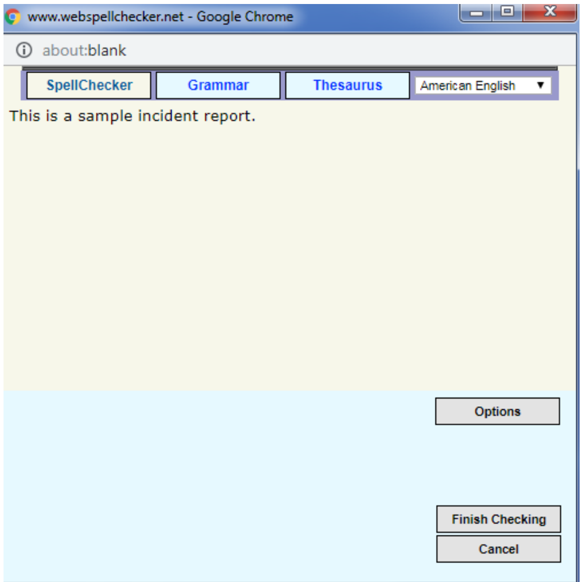
Select the **Change** button to change the listed reporting agency. You must have proper permissions to access this function.



Media/Crime Summary

The Media/Crime Summary is designed to enter a brief description of the Incident. After entering a description, optionally select **Check Spelling** to open the *WebSpellChecker* window. When finished checking your entered text, select **Finish Checking**.

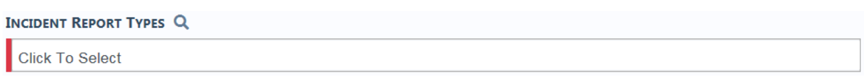


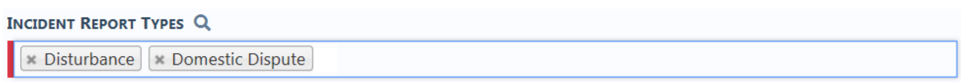


Incident Report Types

The Incident Type selection box is designed to categorize the general nature of the incident. Multiple selections may be selected to cover all applicable types that occurred during the incident. Incident Type is a searchable field when searching for incidents.

Click into the box and select all the applicable Incident Report Types from the provided list.

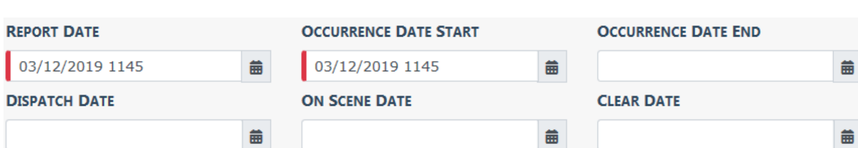




Click on the **X** to remove a selected type from the list.

Incident Report Dates and Times

The Incident Report Times area contains the various times associated with the incident, Report Date, Occurrence Date, Dispatch Date, On Scene Date and Clear Date. These incident date(s) and time(s) may be completed in Incident Reports generated by Caliber CAD or by the Calls For Service module but they still need to be verified by the user for completeness and accuracy. Editing is permitted as needed.



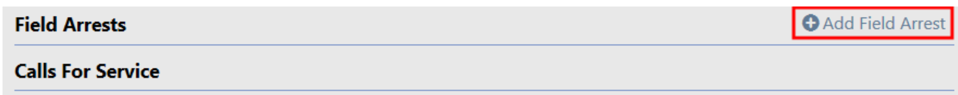
You can click on the date icon on the right of each date field to select a date and time, or type T in the field then tab out to return the current date and time.

Additional Information

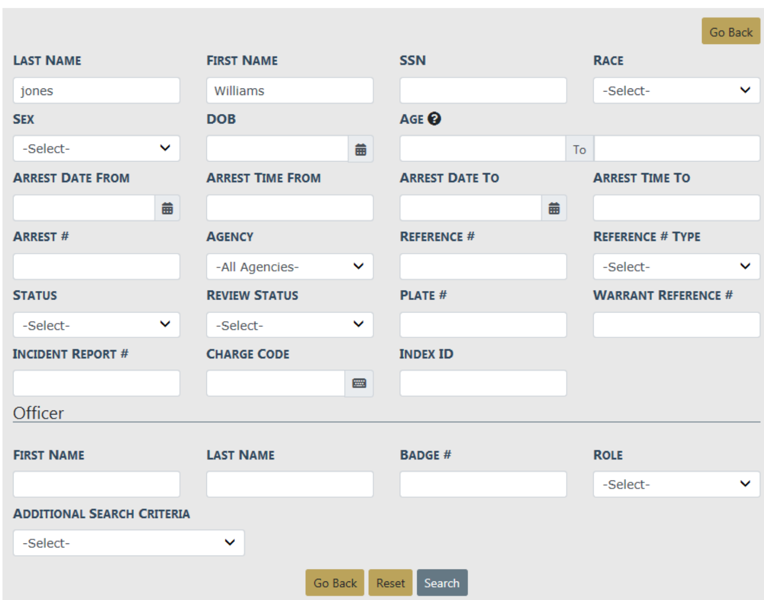
Complete the Additional Information section as needed.

Field Arrests and Calls For Service

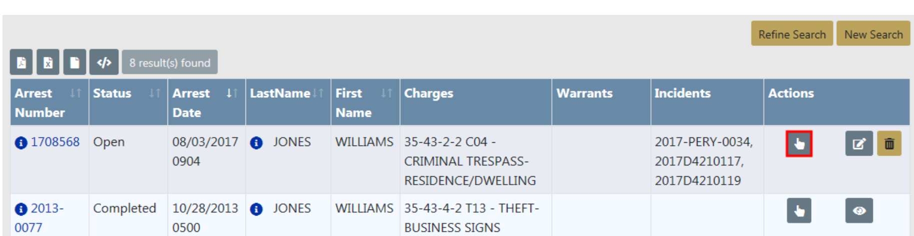
Click on the **Add Field Arrest** link to associate a Field Arrest to the Incident, if applicable.



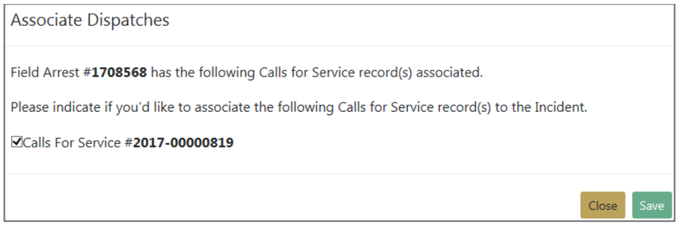
Enter the search criteria in the *Field Arrest Search* form to locate the Arrest record, then click the **Search** button.



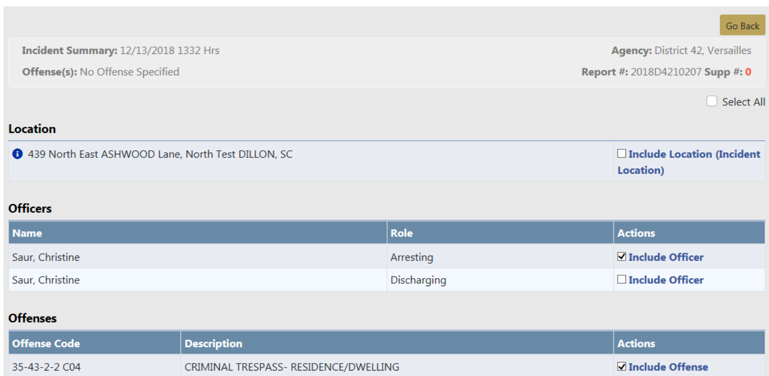
Click on the Select icon in the *Actions* column to select the appropriate record in the *Search Results* window.



In the *Associate Dispatches* window, select the **Calls for Service** records to associate with the Incident, if any. Then click **Save** to associate the records, or **Close** to ignore the request.



If you chose to associate the **Calls for Service** records, the Associate Incident form appears. Select all specifics that apply, then click **Save**.

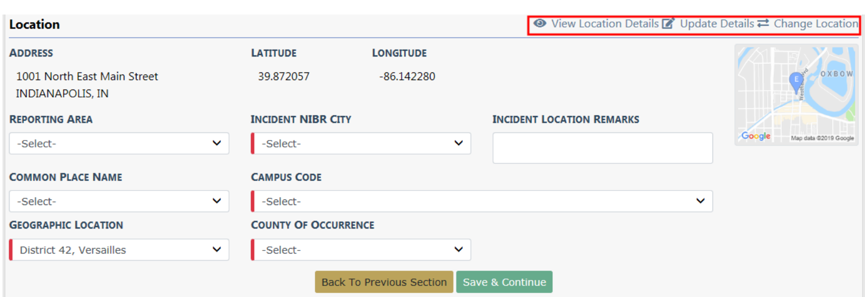


The data then appears in the Arrest and Calls for Service sections.

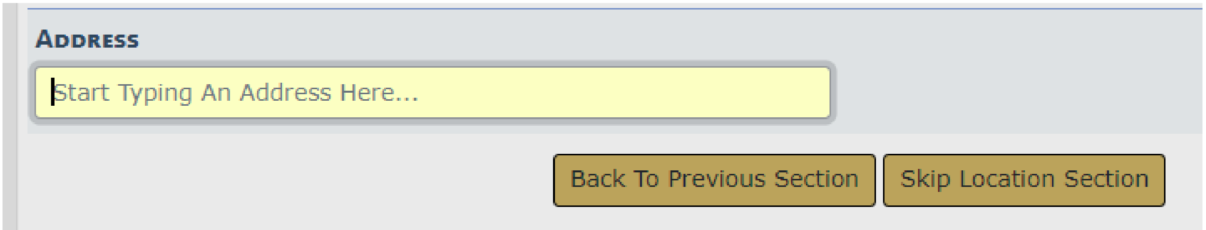
Click the **Continue** button to progress to the *Report Location* tab.

Location

The Location is completed by selecting the geographic location, county of occurrence, town-ship (if applicable) where the incident occurred. The incident address is also added on this screen by utilizing the Master Indices. There are three options available on this page: *View Location Details*, *Update Details*, or *Change Location*.

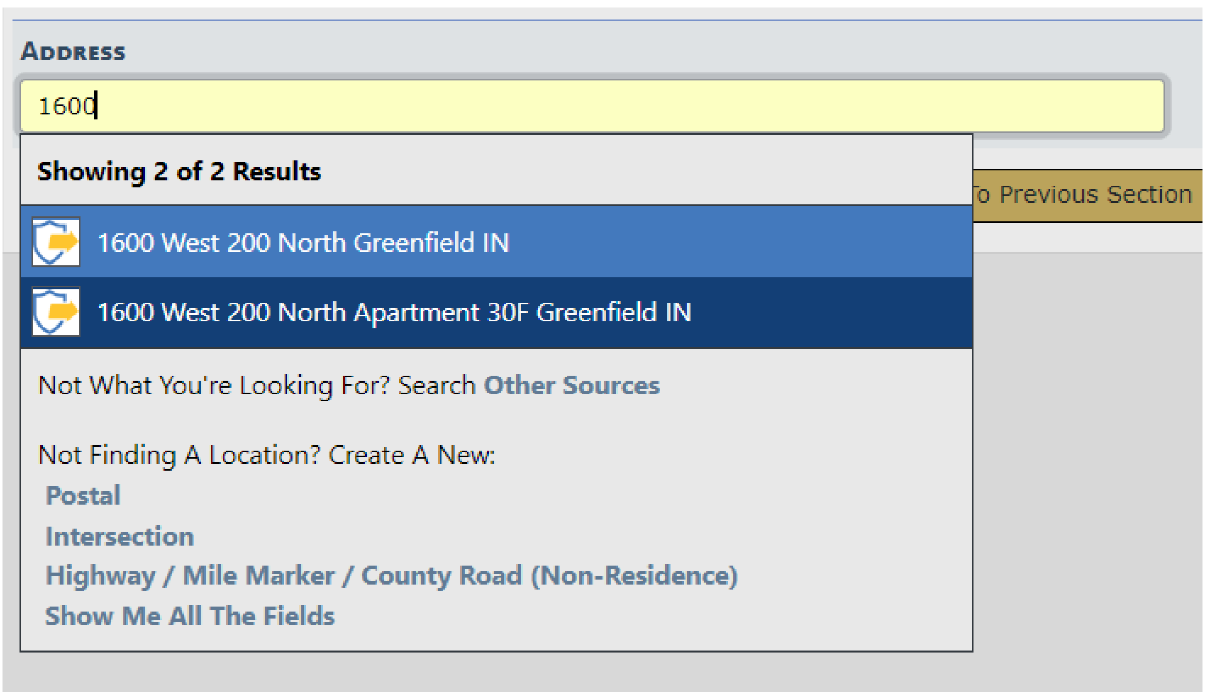


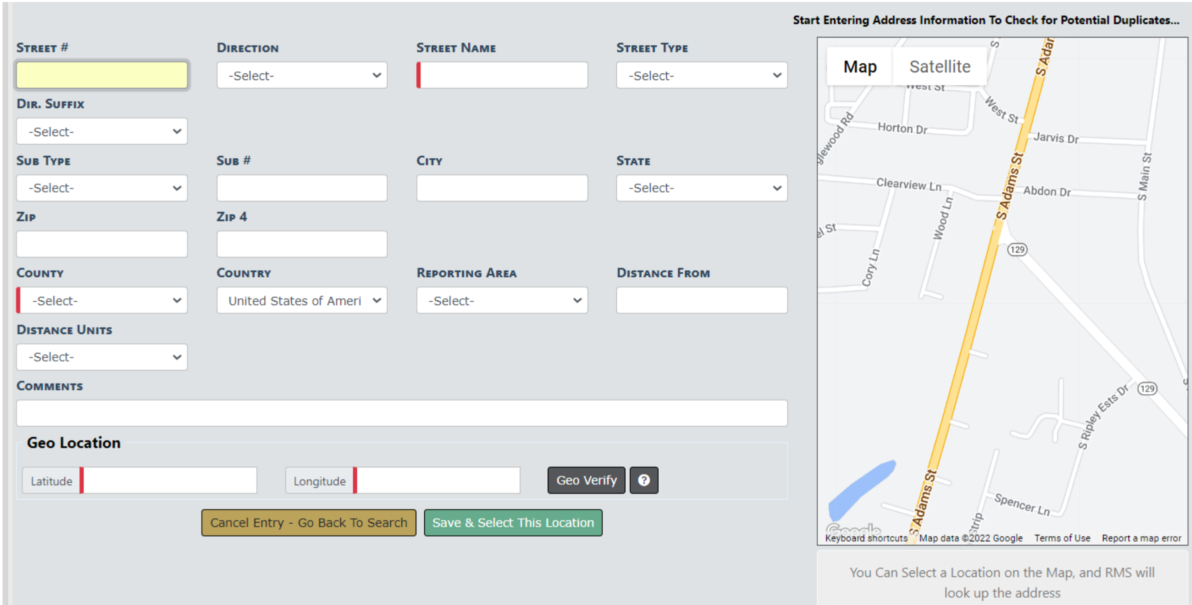
If no Location exists, type in the provided field to supply one. (This is the same screen you will see if you select **Change Location** in the previous screen.)



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

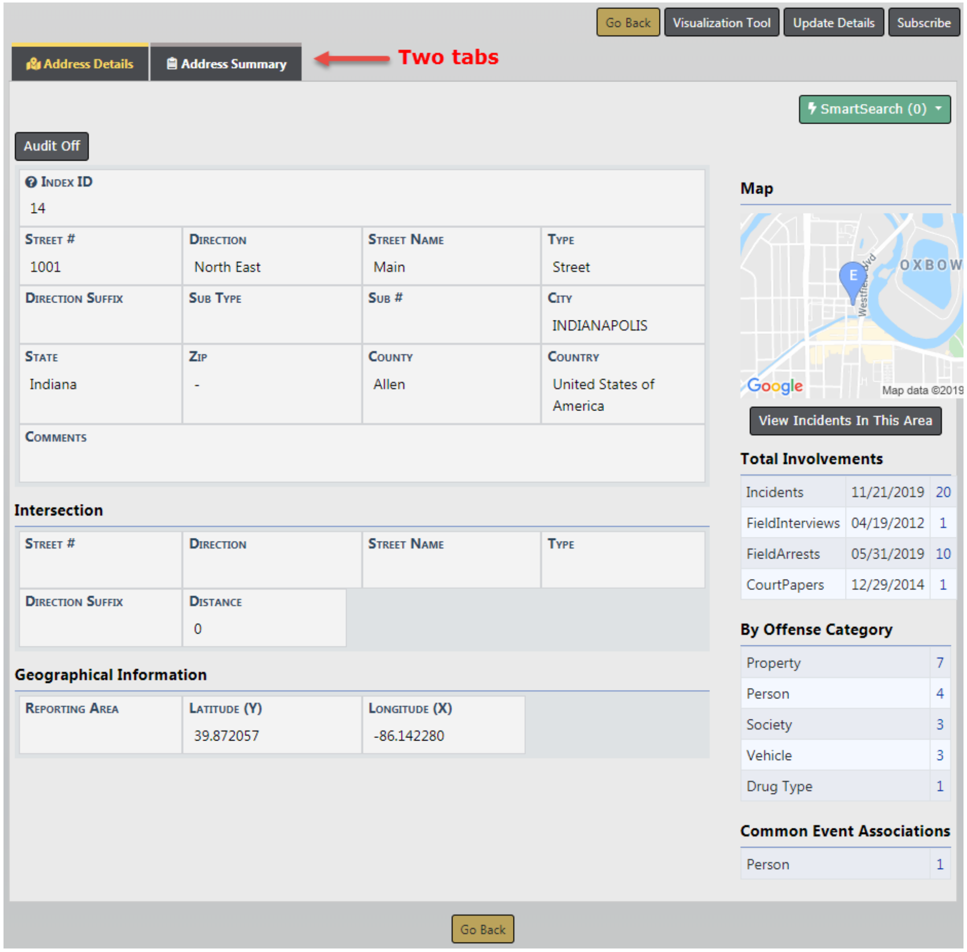
Note: A green checkbox will display when an address is geo-verified.

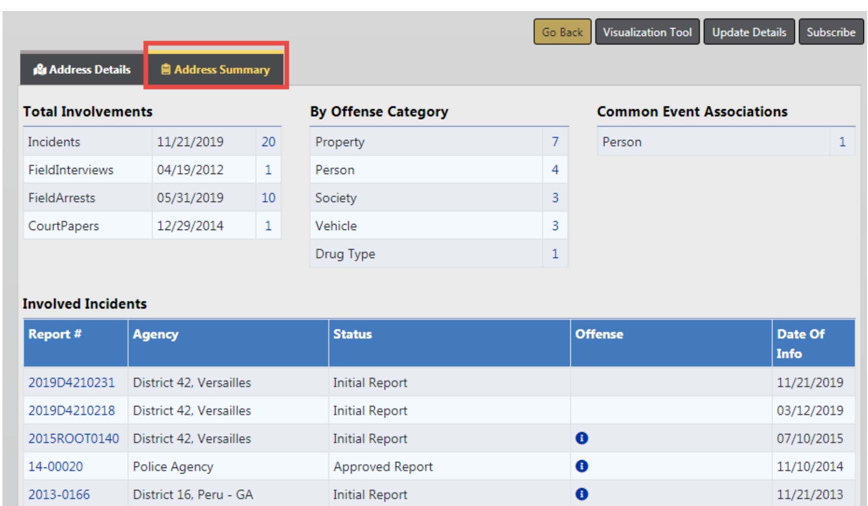




View Location Details

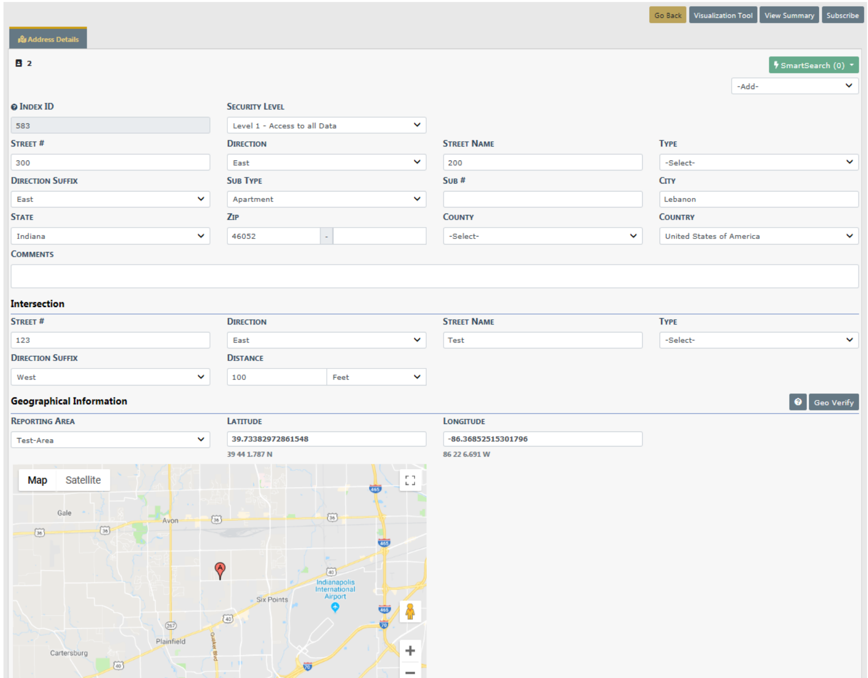
This displays two tabs, *Address Details* and *Address Summary*, that lists all involved incidents tied to this location, and details about the location itself.





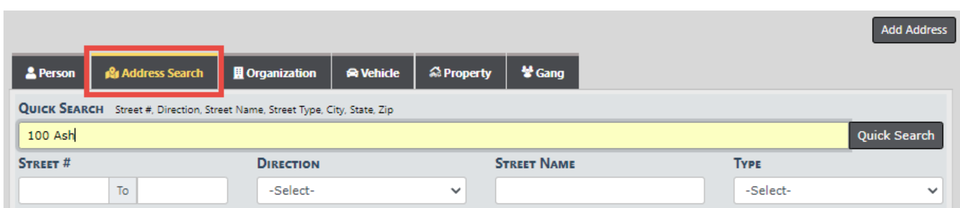
Update Details

Update Details allows you to update the details of the location.



Change Location

Change Location allows you to change the location, address of the Incident. You may also add an address to the Master Index if it doesn't already exist.



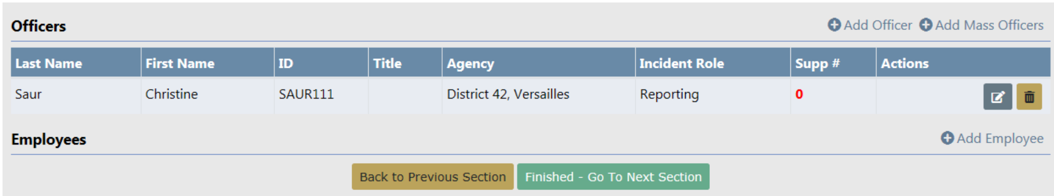
First search for an existing address to determine if the address already exists before adding a new one. It is recommended that you search by individual fields rather than the *Quick Search* field. See "Adding Address" on page 109 for further instructions on adding addresses to the Master Index.

If adding a new address, click the **Save and Select** button. This saves the address to the Master Indices and selects the record for the report.

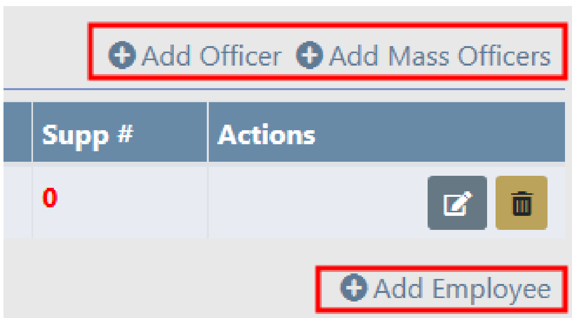
Click the **Save & Continue** button at the bottom of the window to advance to *Officers* .

Officers

The Officers section is where all officers and employees involved in the incident are listed. The officer creating the report will default as the *Reporting Officer*.

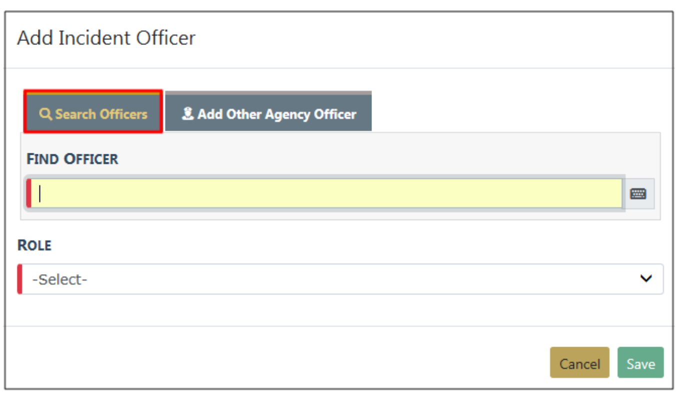


Click the **Add Officer**, **Add Mass Officers**, or **Add Employee** hyperlink to add additional officers or employees.



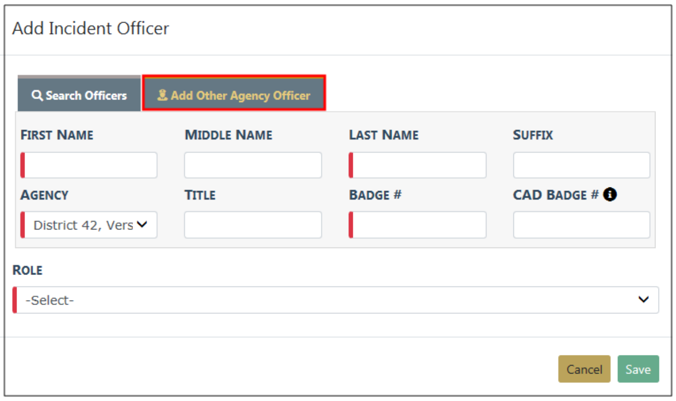
Add Officer

Use this link to add one officer at a time. Begin entering the officer name in the **Find Officer** field to display a list of names that match the entered text, then click the appropriate name from the list. Select the **Role** from the drop-down list.



Note: All Supplement reports must have a *Reporting Officer* associated with the report.

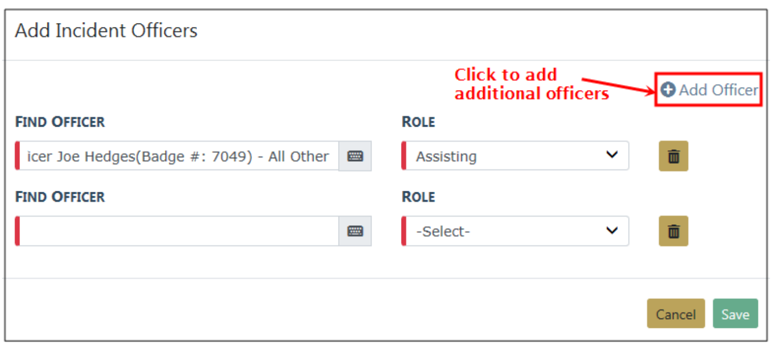
Select **Add Other Agency Officer** to add officers from other agencies. These are officers who are not Online RMS users within the current schema.



Click **Save** to add the officer to the Incident.

Add Mass Officers

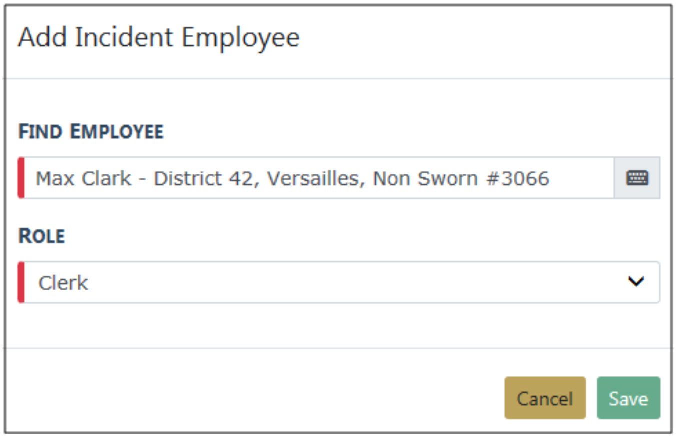
Use this link to add multiple officers at one time. Begin entering the officer name in the **Find Officer** field to display a list of names that match the entered text, then click the appropriate name from the list. Select the **Role** from the drop-down list. Click **Add Officer** to add another officer, and repeat until all officers are included.



Click **Save** to add all selected officers to the Incident.

Add Employee

Use this link to add an employee to the Incident. Begin entering the employee name in the **Find Employee** field to display a list of names that match the entered text, then click the appropriate name from the list. Select the **Role** from the drop-down list.



Click **Save** to add the employee to the Incident.

Click the **Finished - Go To Next Section** button to advance to the *Offenses* tab.

Offenses Tab (Mass Offense Entry)

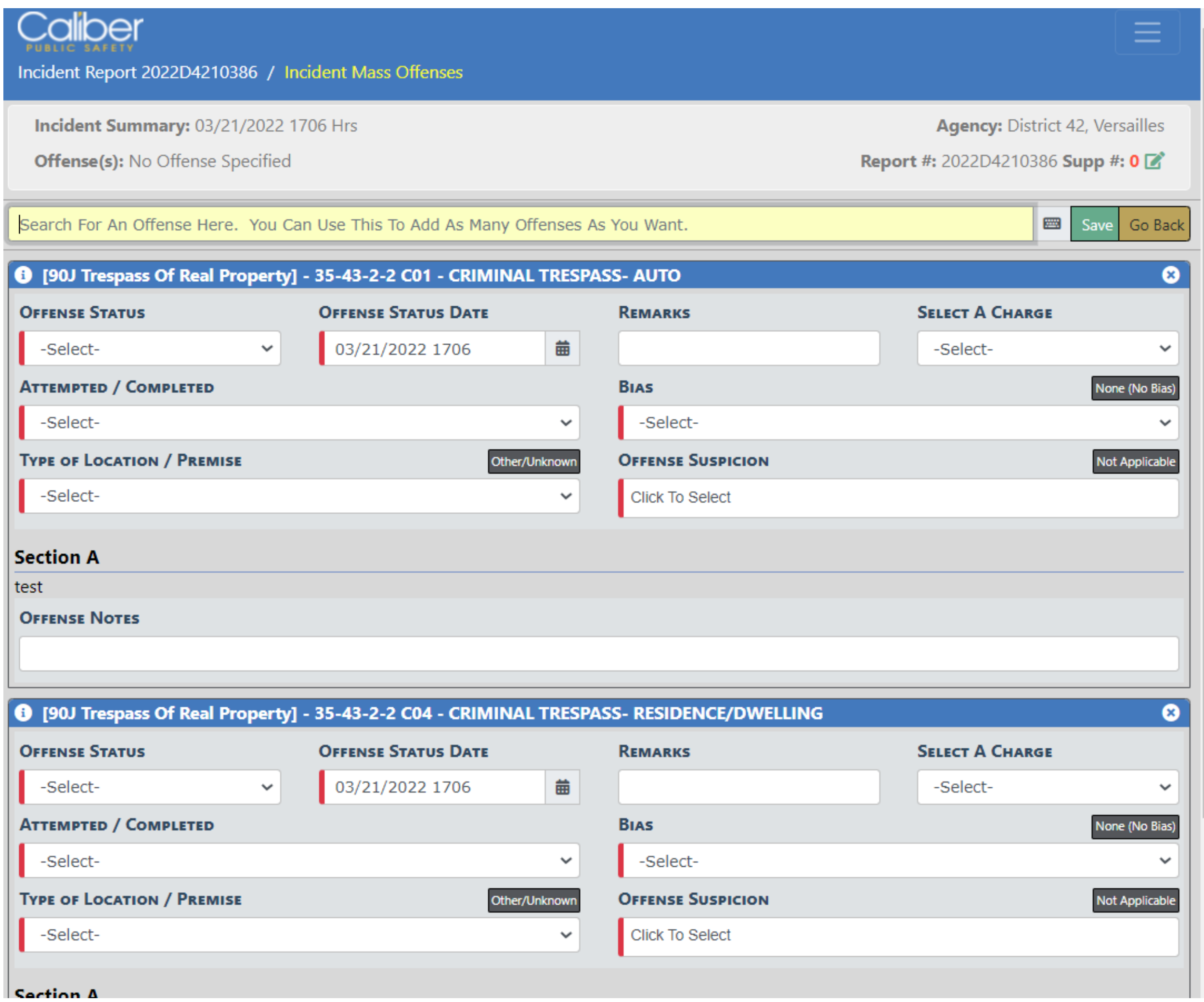
Upon completing the three sections of the **Header Tab** you are then taken to the **Offenses Tab**, where you enter any applicable offenses for the incident report.

If no offense was committed during this incident, select the **Skip Offense Section** and you are taken to the next tab of the report, the **Names** tab. This ability to skip the offense section allows for the agency to create incidents for recording non-criminal incidents (accidents, civil matters, ordinance violations, etc.).

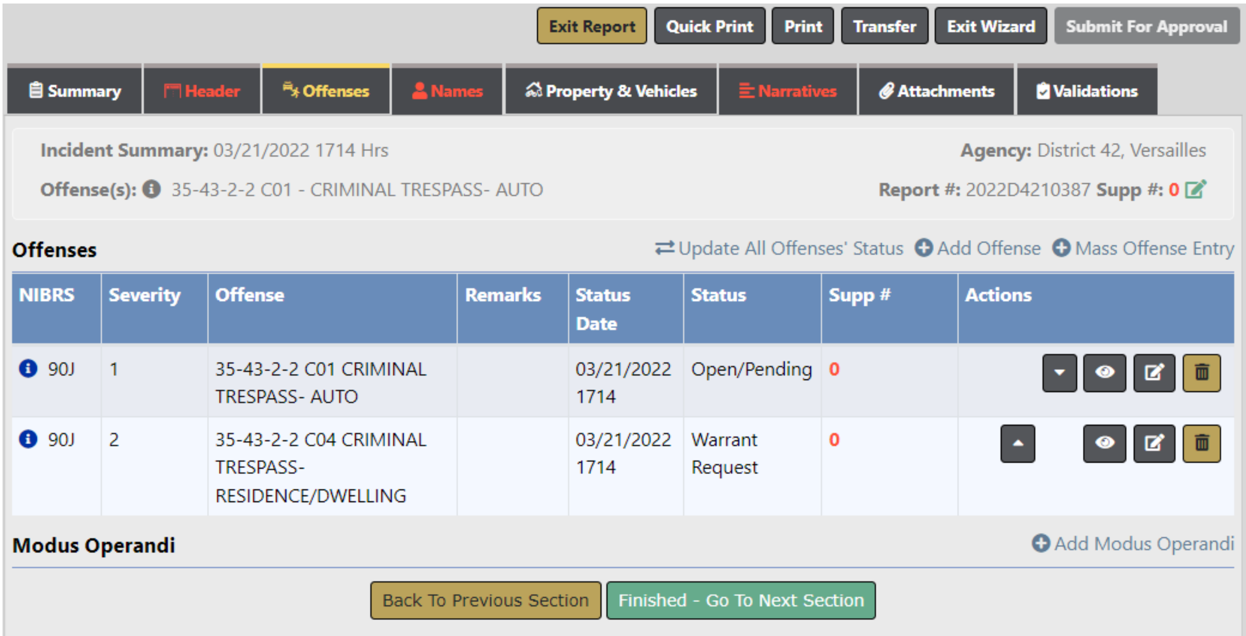
You may enter one offense at a time for an incident, or add multiple offenses at one time. If you wish to add offenses one at a time, refer to "Offenses Tab (Single Offense Entry)" on page 214.

To add multiple offenses for the same incident, begin by entering text into the **Offenses** field, which will cause offenses to autofill with matching options. Select the offense you wish to add by clicking on the entry from the drop-down menu, which will cause the offense to appear below. (Details added in, say, the first offense will filter down to the other offenses in the mass entry.)

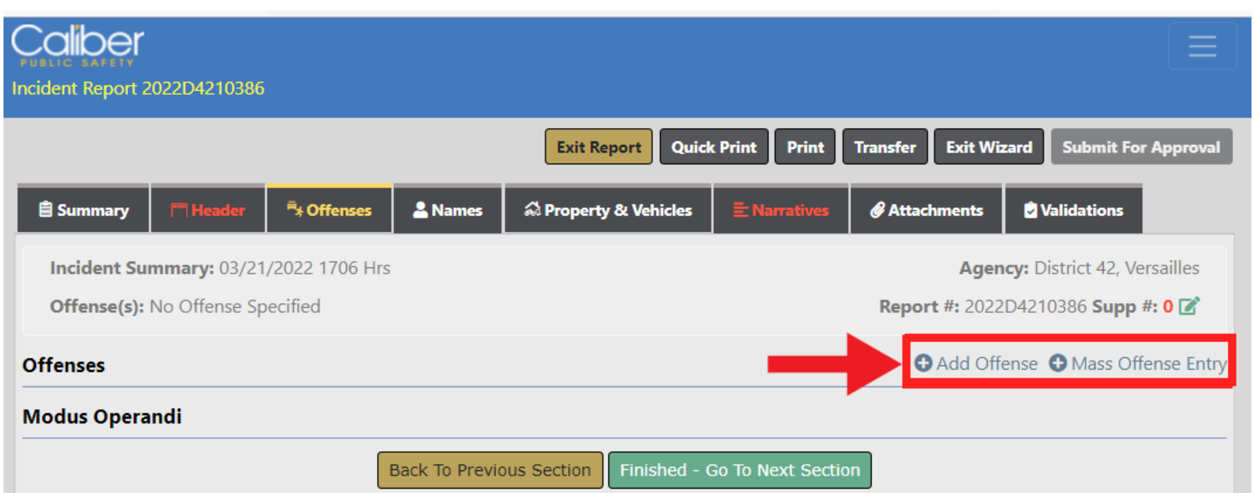
You may repeat this process to add multiple offenses to the incident, then fill out the required fields for each individual offense as needed. When you are finished adding offenses and making selections from the fields for those offenses, click the **Save** link.



Saving the offenses will add the offenses to the incident.

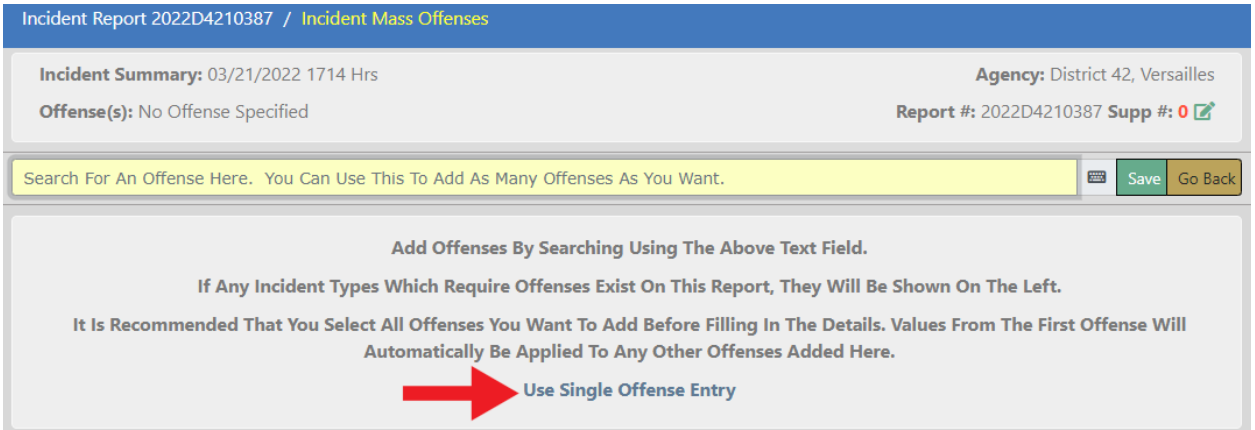


If you have the necessary permissions to edit an incident, you may add additional offenses individually or as a mass of offenses. Select either **Add Offense** (to add an individual offense to the incident) or **Mass Offense Entry** (to add multiple offenses to the same incident.

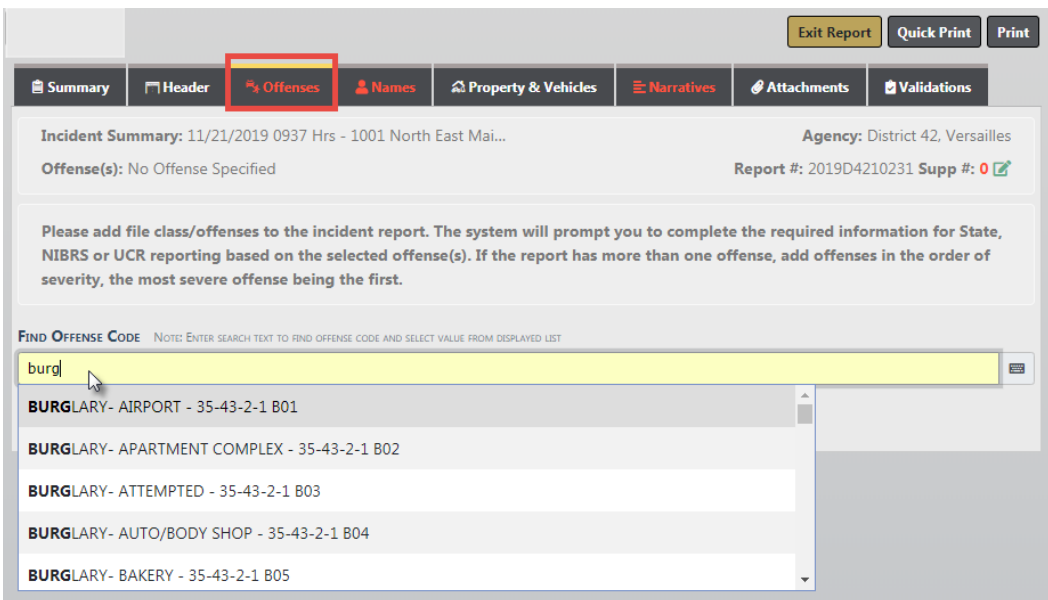


Offenses Tab (Single Offense Entry)

To add a single offense when adding an incident, begin by selecting the **Use Single Offense Entry** link at the bottom of the **Offenses Tab**.

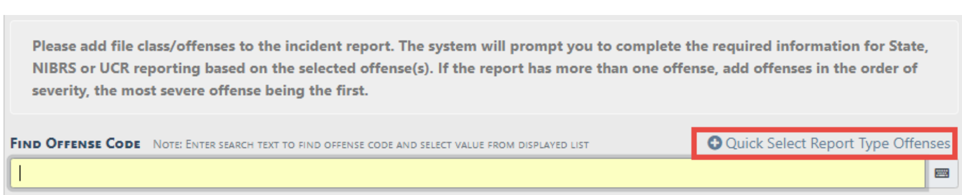


You may now enter text into the single-entry**Find Offense Code** field and select a value from the displayed list. If the offense you entered is not found, refine your search text and the results will refresh as well. If the offense is still not located, contact your agency administrator.



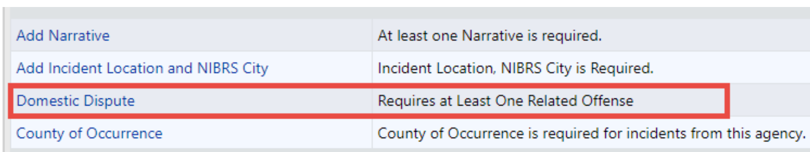
If your agency administrator relates an offense to one or more Incident Types, the offense requires at least one of the related offenses on the Incident Report when that Incident Type is added to an Incident Report.

In this case, a **Quick Select Report Type Offenses** link appears on the Offenses tab.

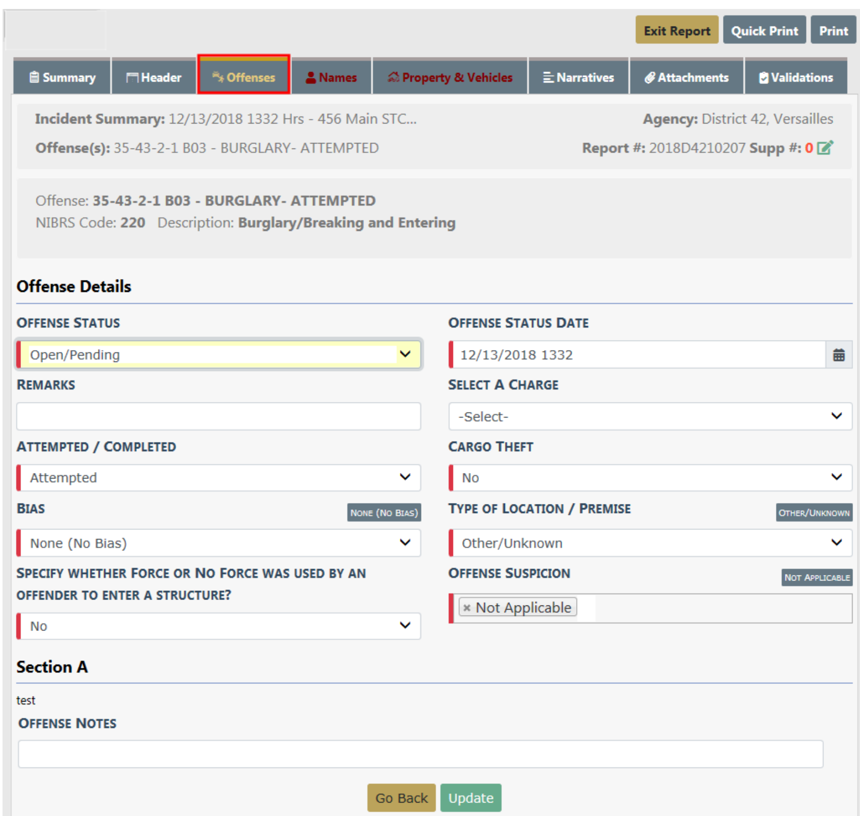


Click the link to open a dialog box that lists the offense(s) from which to choose. You can filter by Incident Type by selecting from the list. Only one offense appears in the below example for illustration purposes.

If you do not choose a related offense, a notification appears on the Validations tab.

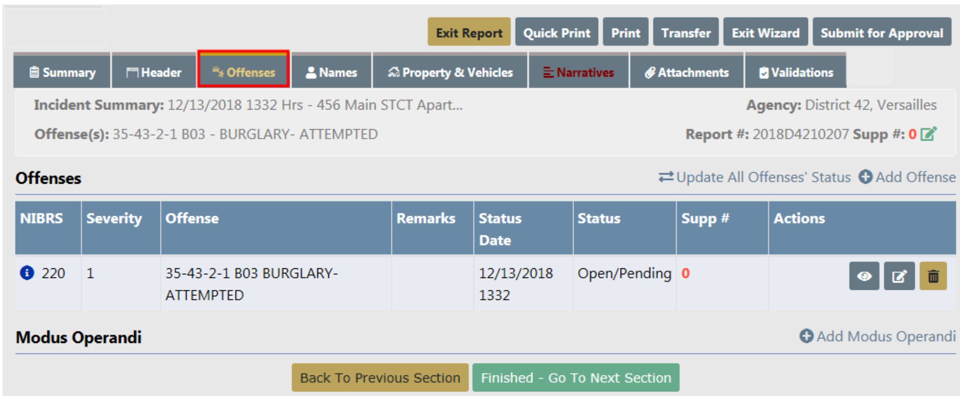


Once the offense has been selected, the system will display the **Offense Details** . This screen is used to describe the status of the offense and collect information related to state reporting guidelines.



Select the appropriate answers about the offense by using the drop down menus or multi-select menus provided. Click on **None**, **Unknown**, and **Not Applicable** buttons to quickly enter that selection into the field, when applicable.

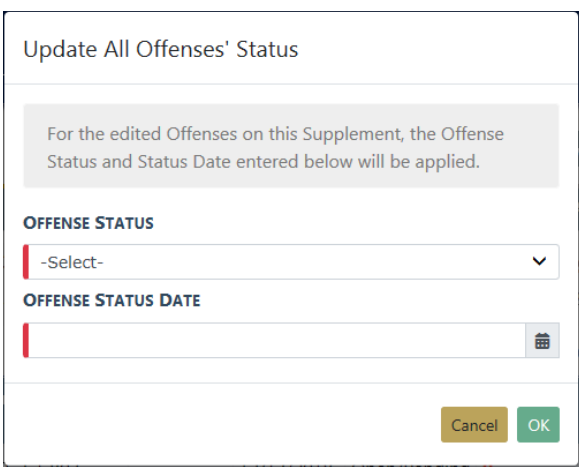
After the mandatory questions have been completed, select the **Save** button, which will then take you back to the **Offenses** tab for review.



Hover your mouse over the information bubble to the left of the NIBRS code to view the NIBRS Crime Description.

Additional offenses may be added by clicking the **Add Another Offense** hyperlink and repeating the same process.

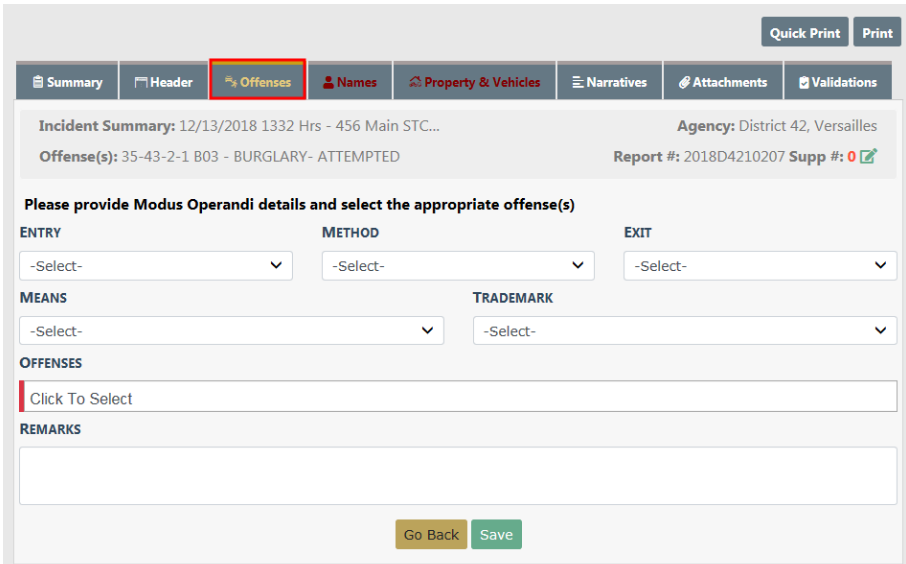
Click on the **Update All Offense's Status** hyperlink to update the offense status and status date on all edited offenses on the Supplement.



Select the **Offense Status** and enter the **Offense Status Date**, then click **OK**.

Depending on the offense(s) selected on the Incident, certain tabs may turn red. This indicates that additional information in those tabs is needed to validate the state reporting requirements for the agency. Placing the mouse pointer over the red tab displays a pop-up window displaying the required information.

Optional **Modus Operandi** information can also be added at the bottom of the page. Clicking the **Add Modus Operandi** link will display the **Modus Operandi** page where entry, exit, method, means, and trademark information can be added and associated to one or more of the offenses listed on the report.

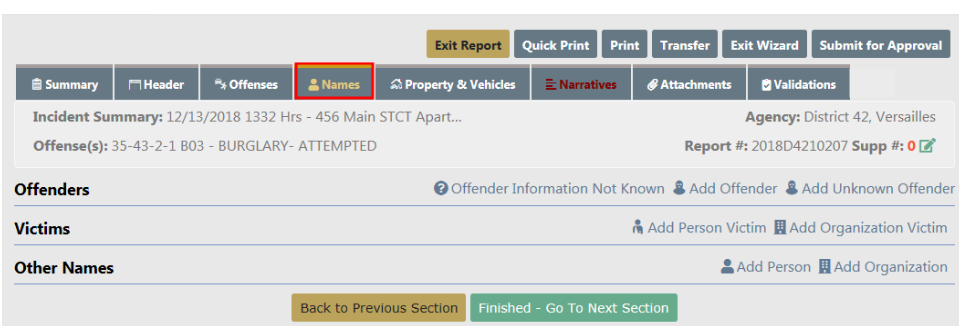


Click **Save** after entering or selecting all required fields on the **Modus Operandi** page.

Click the **Finished - Go To Next Section** button to advance to the *Names* tab.

Names Tab

The **Names Tab** contains the list the names of all persons and organizations involved in the incident. The names section is broken into three sections, the *Offender*, *Victim*, and *Other Names*.

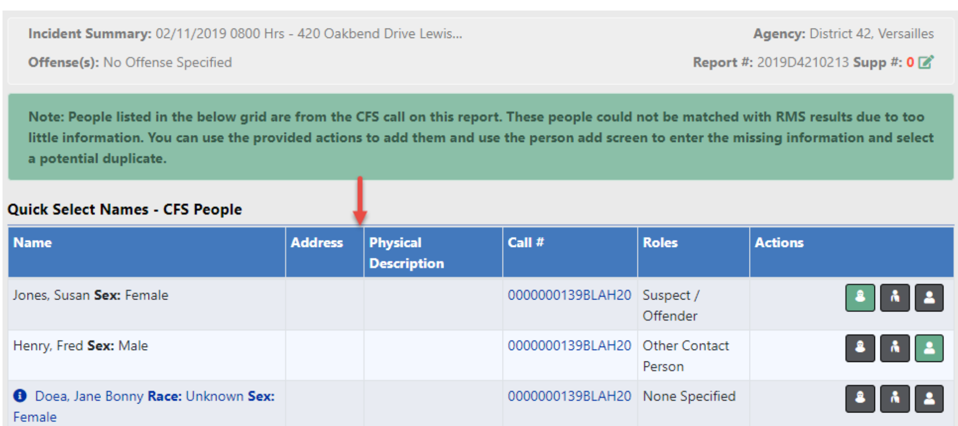


Agencies using Caliber CAD and entering person contact data, the Person Name data is automatically added to the incident report in Online RMS without user action using one of the following criteria:

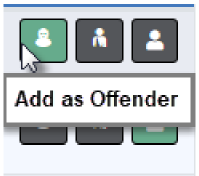
- *Person exact match*. Caliber CAD CFS Contact Type matches Online RMS involvement role.
  - Person is added to the incident report Offenders, Victims, or Other Names section automatically without user action.
- *Person exact match*. Caliber CAD Person Contact Type is **not** provided **nor** matches Online RMS involvement role.
  - Person is added to Master Person Index automatically without user action. Use **Quick Select Names - CF People** option to add person to incident report.
- *No Person exact match*.
  - Use **Quick Select Names - CFS People** option to create the master person index record and add to the incident report.

Quick Select Names - CFS People

If the CFS module and integration is turned on, and the integration process cannot match people that exist on the CFS record with RMS, the unmatched names appear in this section of the **Names Tab**. With appropriate permissions, you have the option to add unmatched people to the Master Index in RMS, then associate them with the Incident Report.



Click the appropriate icon in the *Actions* column to add the name as an Offender, Victim, or Other Person. Hover your mouse over each icon for a description of what the icon does.



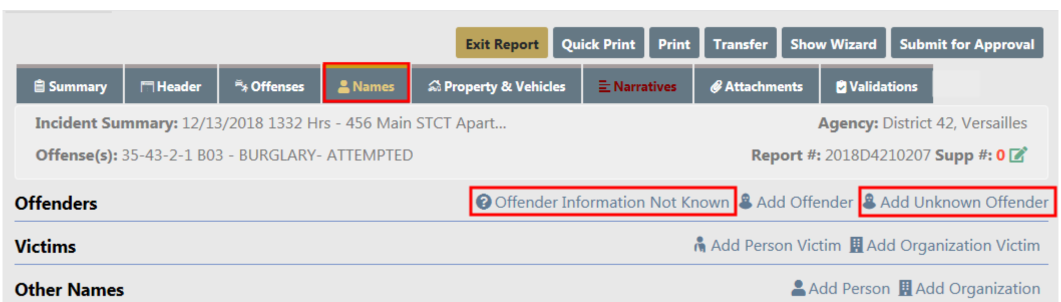
Note: A green icon suggests the Recommended Action based on the CFS Contact Type/Involvement Role. For example, if the *Add as Offender* icon is green, that is the recommended action.

Note: Names appearing as black text, lack unique person identifiers required to match to or create a new master person index record.

After clicking the appropriate icon, the **Add Person** screen appears. Fill in the appropriate information then add and select the person. When adding a new person record, the system notifies you if there are potential duplicates.

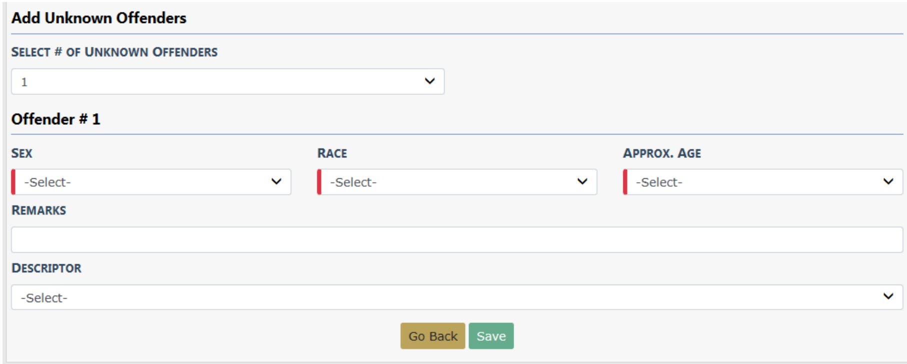
- For more information, refer to "Adding Person" on page 100.

Offenders Section-Adding Unknown Offender(s)



- **Add Unknown Offender**

  Selecting the **Add Unknown Offender** hyperlink prompts you to list the number of unknown offenders by using a drop down menu. Once the number of unknown offenders is selected, add applicable sex, race, age, and description to each. *Not Known* is also an acceptable answer.



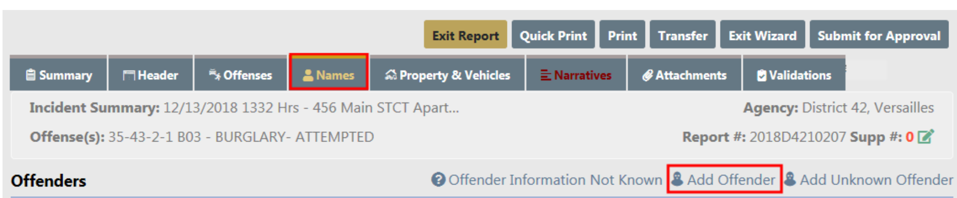
Click **Save** to create the Offender records.

- **Offender Information Not Known**

  Selecting **Offender Information Not Known** enters one *Unknown Offender* record as a place holder, allowing you to return and update the record when details are known.

The **Offender Information Not Known** hyperlink only appears when an Offender record is nonexistent.

Offender Section-Adding Known Offender(s)



If the **Add Offender** hyperlink is chosen you are taken to the **Master Indices Person Search** screen.

You can select person records for the incident report three ways:

- Search by entering your own criteria, then select from the search results list.
- Create new master person record and add it to the incident report.
- Search for a person that exists on a CFS record that is associated to the incident report, if applicable, then select from the search results list. An Associated CFS Available link appears if the incident is associated to a CFS record.

For more information on searching, selecting, and creating *Master Person* records, refer to "Master Indices" on page 83.

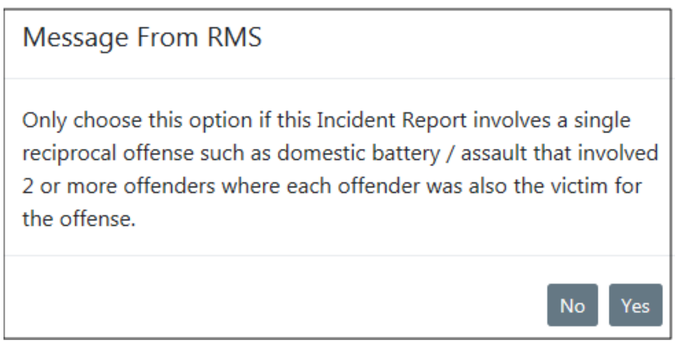
Note: Always search for *Master Person* prior to adding a new record. Search as broadly as possible to yield more results, then Refine Search as necessary to narrow the search. This will help to prevent Master Indices duplicate records for the same Person, Address, etc.

Once all information has been added to the person record, click the **Select** button to continue to the next screen to add additional NIBRS/UCR related information for that person.

- When finished updating the offender information, and if the Field Arrest module is turned on and role of arrestee has been added, you receive a prompt asking if you would like to create a Field Arrest for this offender.

  Click **No** to return to the Incident without creating the Field Arrest, or click **Yes** to create the Field Arrest. For more information, refer to "Names Tab" on page 218. No matter what you choose, the process creates the offender record and adds it to the Offender section of the Incident.

If you select the box indicating that the Offender was also a victim of the offense, you are asked to confirm. Select **Yes** to confirm.



Select the **Save** button to return to the **Names** tab where the person will appear added to the Offender Section. If the offender was also a victim, the name is also listed under the victim section. Add additional offenders if applicable.

Offender Section-Create and Edit Field Arrest

If the Field Arrest Module is turned on for your agency and you have appropriate permissions, you can create a Field Arrest and import incident data into the offender's arrest record using one of the following methods:

- Click on the **Add Field Arrest** icon next to the offender's name when it exists.

  Select the items you want to import from the list that appears then supply any necessary information from additional fields that appear based on your selection.

  Click **Yes** when asked to confirm the creation of the Field Arrest.

The *Edit Field Arrest* form opens. Update the Field Arrest as needed and click **Update**. For more information on updating Field Arrests, refer to "Edit Field Arrest" on page 370.

Click **Go Back** to return to the Incident Report.

The **Add Field Arrest** icon  changes to **Edit Field Arrest** . You can now edit the Field Arrest while on the Names tab of the Incident.

- Click the **Add Offender** link to add an offender to the Incident and role of arrestee has been added. After you finish adding the offender information, a prompt appears asking if you want to create a Field Arrest for this offender.

Click **Yes** at the prompt, then follow the steps in "Create Field Arrest from Incident" on page 267

Incident Victim(s)

Society crimes will default **Society** as the victim.

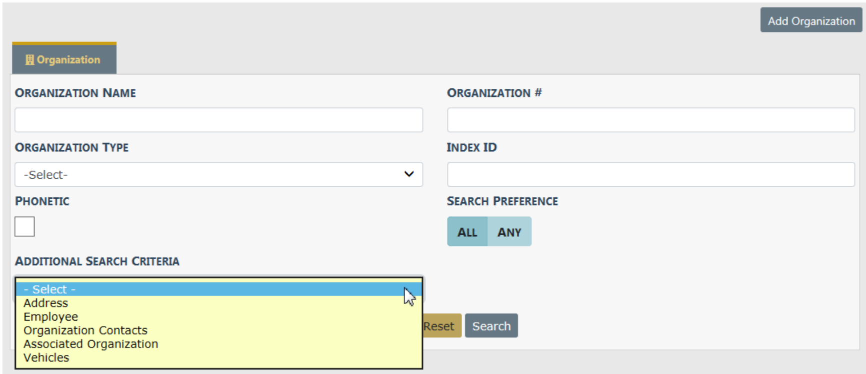
Persons and Organizations can be added to the Incident following the same process used to add a Known Offender. For details on adding a Known Offender refer to "Offender Section-Adding Known Offender(s)" on page 221.

At the bottom of the screen is an optional area where you can note Victim Rights Notification information if applicable.

Click **Continue** to return to the names tab where the person added can be seen. Add Additional victims in the same manner if applicable. If no other names are needed click the **Finished - Go To Next Section** button to proceed to the **Property & Vehicles** tab.

Adding Organization as Victim

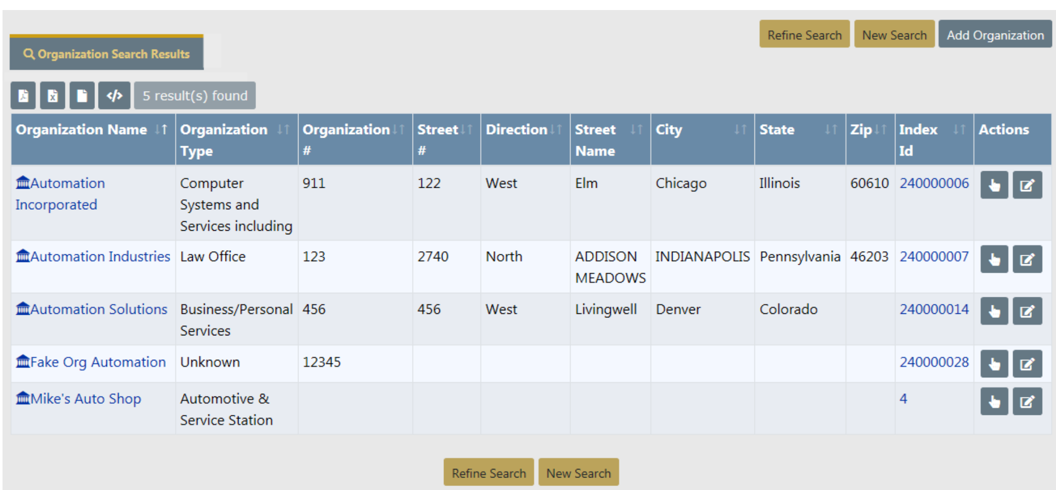
Select the **Add Organization** hyperlink to advance to the **Master Indices Organization Search** screen. Search for the Organization they need to add to the report as a victim.



Note: Always search the Master Indices prior to adding a new record. Search as broadly as possible to yield more results then Refine Search as necessary to narrow the search. This will help to prevent duplicated records for the same Person, Address, etc. in the Master Indices.

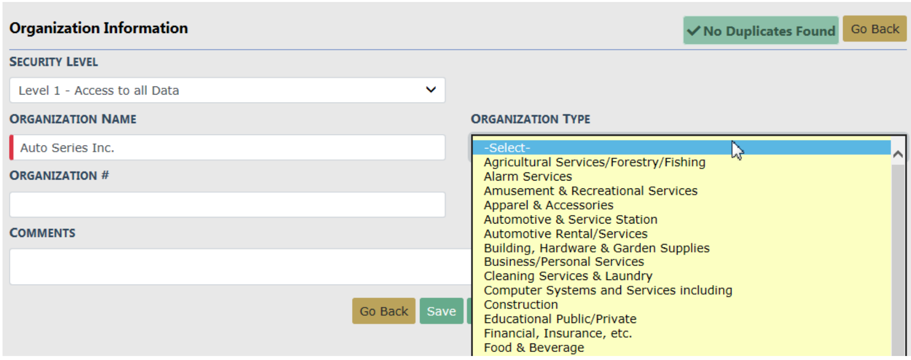
The search results display either a list of organization names meeting the search parameters or will indicate that there were no results found.

If the desired organization is listed, you can select the existing record as the victim for the report. Best practice is to review the information by clicking on the Organization Name or Index ID to review the information and verify it is up to date prior to selecting the record for the report.



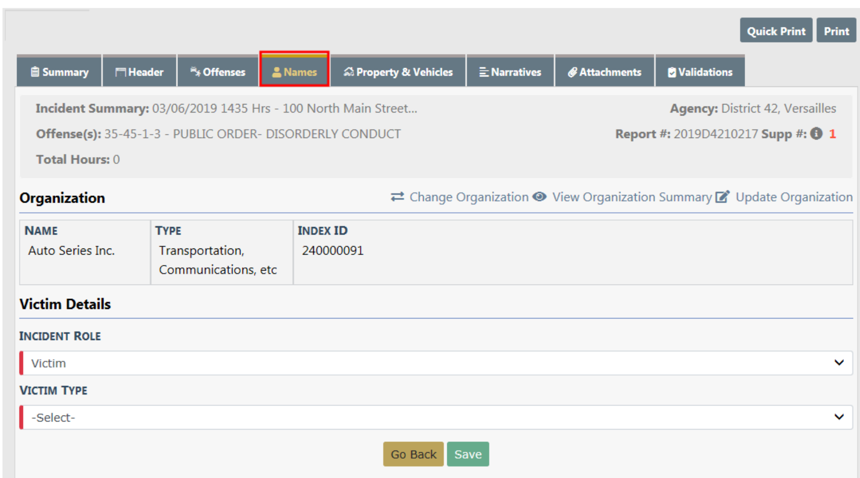
Organization Name	Organization Type	Organization #	Street #	Direction	Street Name	City	State	Zip	Index Id	Actions
Automation Incorporated	Computer Systems and Services including	911	122	West	Elm	Chicago	Illinois	60610	240000006	
Automation Industries	Law Office	123	2740	North	ADDISON MEADOWS	INDIANAPOLIS	Pennsylvania	46203	240000007	
Automation Solutions	Business/Personal Services	456	456	West	Livingwell	Denver	Colorado		240000014	
Fake Org Automation	Unknown	12345							240000028	
Mike's Auto Shop	Automotive & Service Station								4	

If the organization does not already exist in the Master Indices, select **Add Organization** to add the new record. Enter the Organization Name and Type fields then click **Save**, or click **Save & Select** to save and add to the Incident. Add additional known information such as the organization's address, phone number, employee information, and attachments.

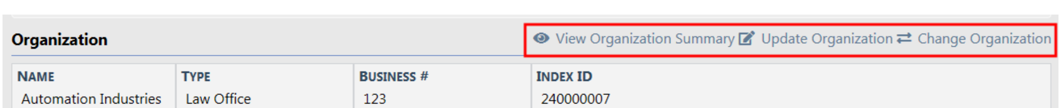


With proper permissions, you can select the **Security Level**. For more information, refer to "Master Index Security" on page 85.

If you are selecting an organization from the search results list, click the **Select** icon to add the organization to the report. Add additional required information regarding the organization's role, the offense(s) the organization is a victim of, and the victim type.



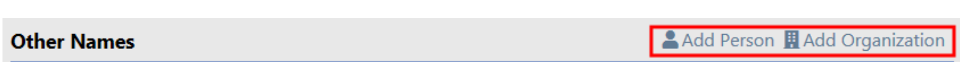
You can, with appropriate permissions, **View Organization Summary**, **Update Organization** information, or **Change Organization** by clicking on the respective links on this screen.



Click the **Save** button to add to the Incident. Add additional names and organizations for the report if applicable.

Other Names

Additional persons and organizations can be added to the report when applicable.



The entry of **Other Names** is performed using the same method as adding a Person, Organization, Victim, or Known Offender.

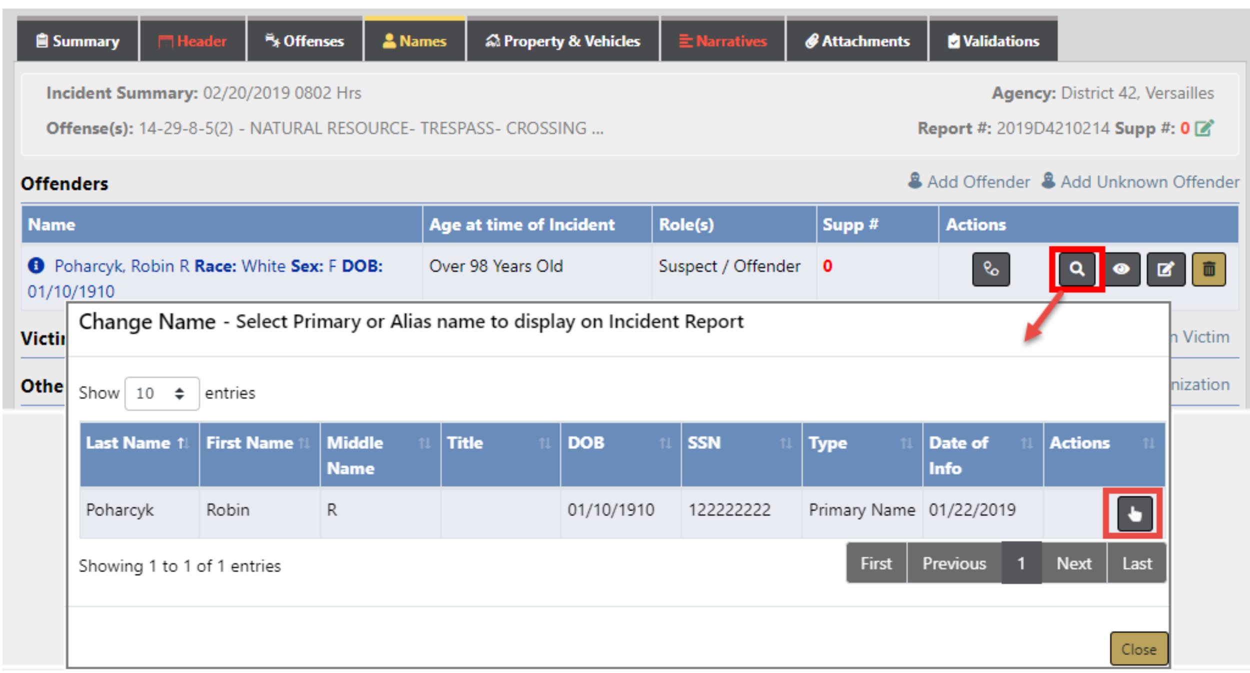
For more information on adding a Known Offender refer to "Offender Section-Adding Known Offender(s)" on page 221.

For more information on adding an Organization as a Victim refer to #AddOrgAsVictim.

Select the **Finished - Go To Next Section** button to proceed to the *Property & Vehicles* tab.

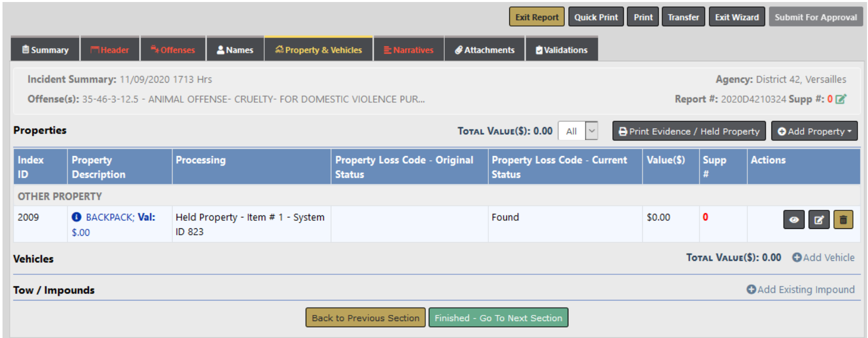
Changing a Name

You can change a name from primary to alias or visa versa if you have already added a name in one or more of the name sections of the incident. Click on the magnifying glass then select a name that appears in the list.

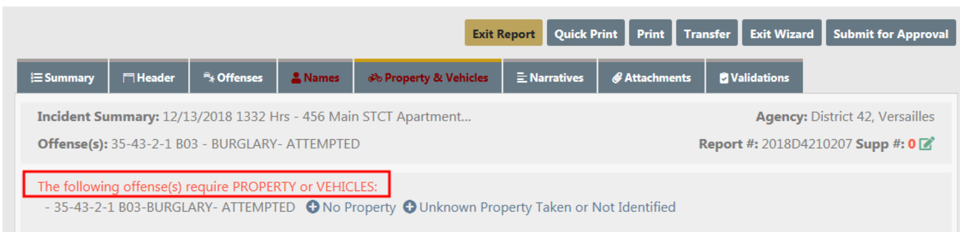


Property & Vehicles Tab

The **Property & Vehicles Tab** contains all the incident related property and vehicles.

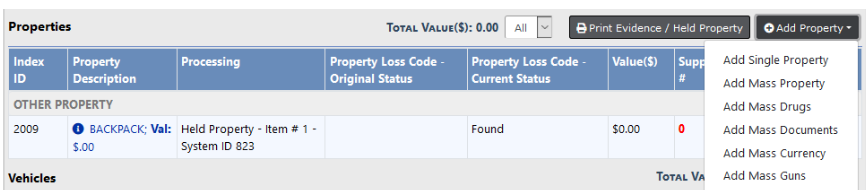


If there is an offense on the report that requires property or vehicle association to satisfy NIBRS/UCR validations, the tab will be red and there will be instructions on the page stating the requirement.



Add Property

Click the **Add Property** button to display menu items from which to choose. You can add a single piece of property, or multiple (mass) property types listed.

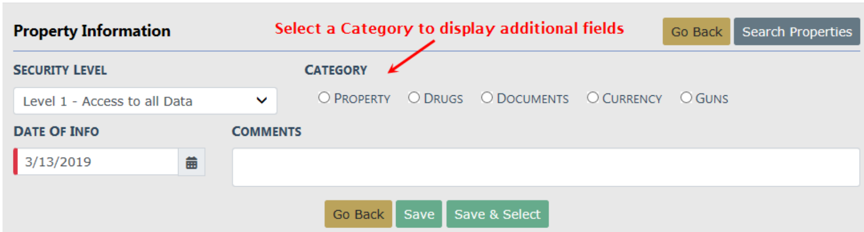


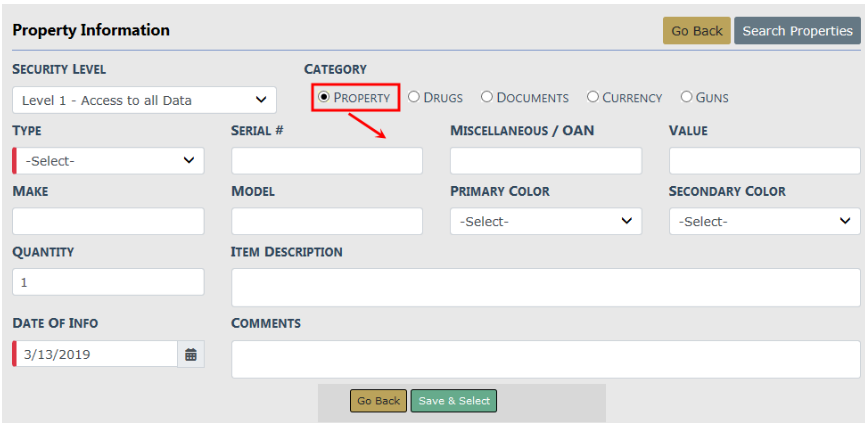
There are five **Categories** for adding property: *Property*, *Drugs*, *Documents*, *Currency*, and *Guns*.

The majority of the time when dealing with a piece of property for an Incident report, the piece of property has not been dealt with by the user's agency. For this reason you are presented with the **Add Property** screen instead of a **Master Indices** search screen.

- **Add Single Property**

  Click **Add Single Property** to display the *Property Information* screen. Select the **Category** to display additional fields to describe the property in more detail.





Note: If you have reason to believe the piece of property you are going to enter on the report has been dealt with previously, use the **Search Properties** button to the top right, locate the existing property in the **Master Indices**, and add it to the report.

Note: Drug property quantities and measures may be edited through supplements that appear on the current report, but may only be edited by a user if they appear on an incident for which that user has ownership and if the QTY = 0 or UOM = Not Reported.

Enter necessary data, then click **Save & Select** to save your entry and add it to Incident Property.

- **Add Mass Entries**

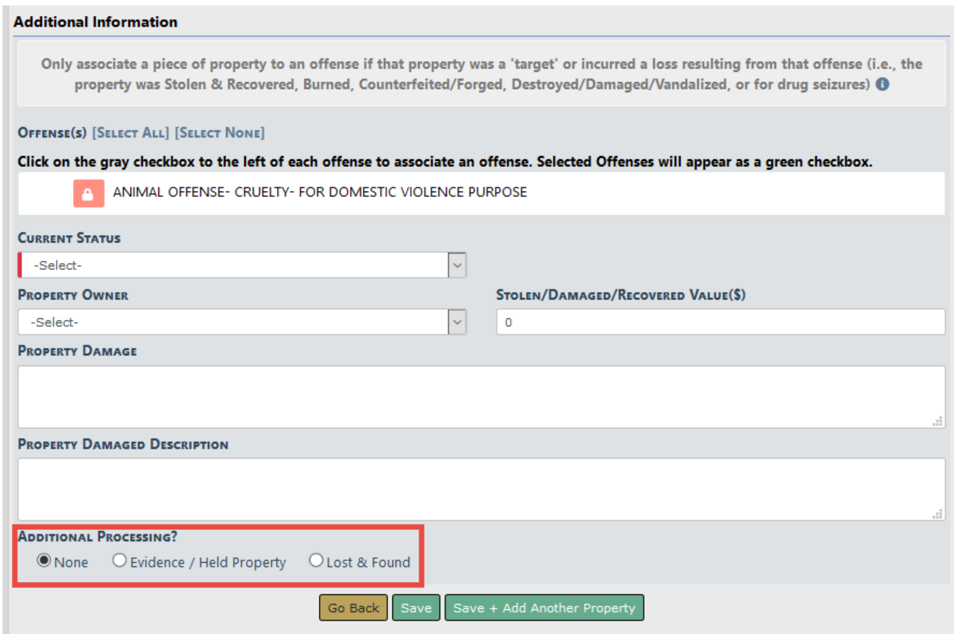
You can add multiple (mass) property types for *Property*, *Drugs*, *Documents*, *Currency*, and *Guns*. If you choose any one of the Mass options, you can add multiple property records on one screen, rather than add them one at a time.

Refer to "Mass Entry" on page 233 for details.

Note: If you are entering *Mass Currency*, currency should only be used when dealing with large amounts of currency where the denominations are known. For smaller amounts, use the *Property* category and select **Cash** from the drop-down list. For example, *$500 stolen from a person* would be entered as *Property*, Cash and the description could state *Miscellaneous 5, 10, & 20, dollar bills*.

Enter the property information in the fields provided then click **Save** to display *Additional Information*.

You have the ability to process the property as **Evidence/Held Property**, **Lost & Found**, or **None** (neither), providing your agency elected to turn on these modules.



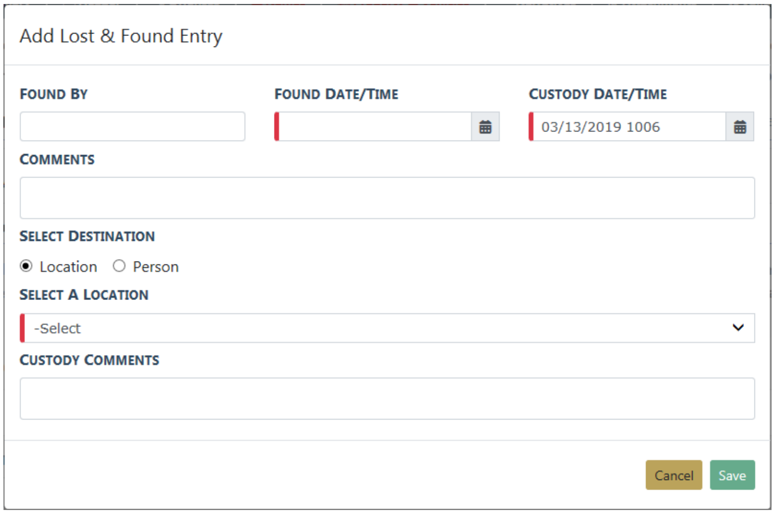
Note: Your agency may elect to default the *Additional Processing* selection based on the Incident Current Status and Property Loss Current Status. For example, if the Incident Current Status is *Seized*, the agency may elect to default the selection to **Evidence/Held Property**. Contact Caliber Public Safety by entering a Support Ticket to request this configuration option.

If you choose **Evidence/Held Property** or **Lost & Found**, a data entry screen appears with data specific to the option you choose. You must also select a **Current Status** from the drop-down list.

Note: With Online RMS version 11.6 and above, your agency administrator has the option to configure which Statuses default the Processing radio button to **Evidence/Held Property**; otherwise, **None** is the default.

Lost & Found

The *Add Lost & Found Entry* screen appears after selecting the **Lost & Found** button.



Enter the necessary information then click **Save**.

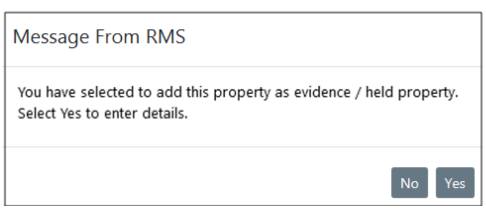
The newly entered **Lost & Found** information appears near the bottom of the *Additional Information* screen. If necessary, click on the **Edit** link to update the record.

Click **Save + Add Another Property** to save the new entry and add another property record, or click **Save + Continue** to save the new entry and display the property records.

Note: For information on the *Lost & Found Module*, refer to "Lost and Found Property" on page 761.

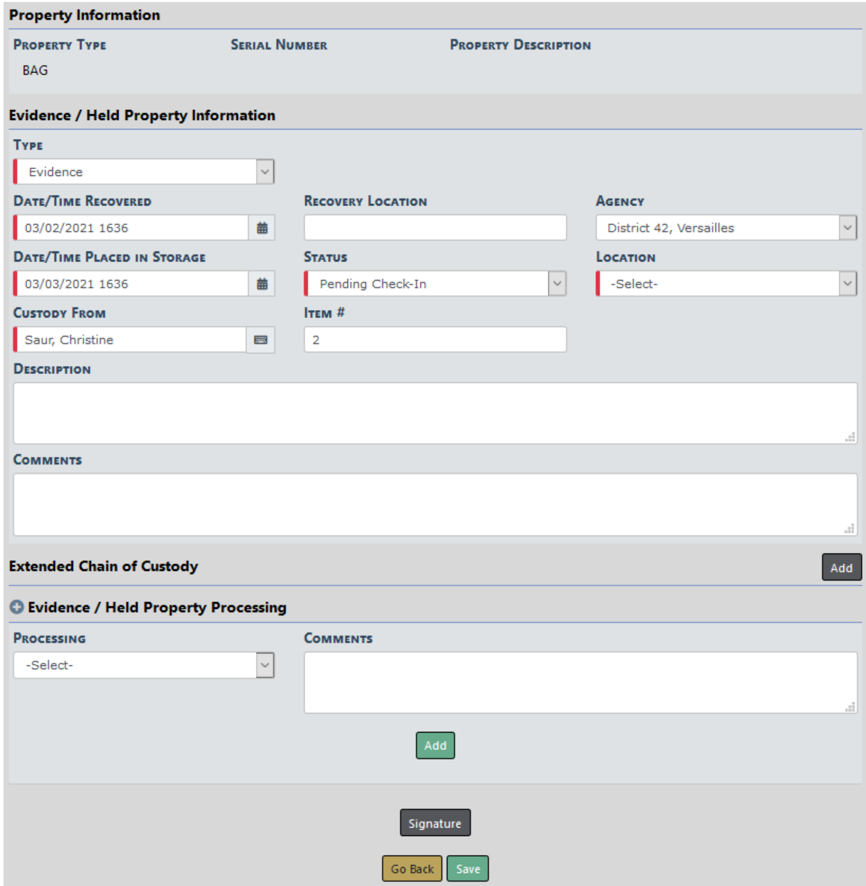
Evidence/Held Property

For Evidence/Held Property, select the **Evidence/Held Property** button, select a **Current Status**, then click **Save** to display an evidence confirmation.

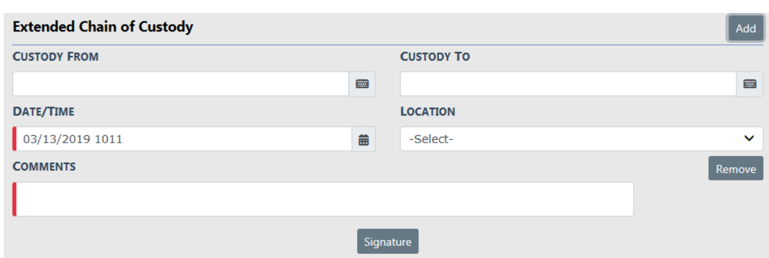


Selecting the **Yes** button displays the **Evidence - Held Property** screen to enter the type (evidence or held property), date and time of recovery, the location the evidence is being stored, data and time it was placed in storage, description, comments, an extended chain of custody and if the evidence needs any testing.

The Status defaults to either *Pending Check-in* or *Pending Check-in* and *Check-in*, depending on your agency setting. The Location list of values (LOV) will be filtered based on the Status and Type.



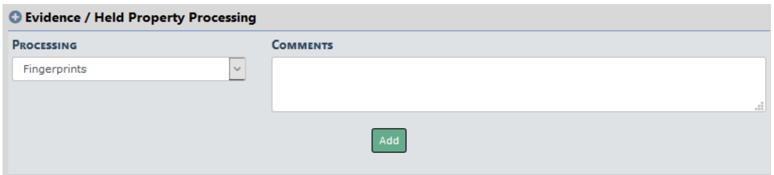
An **Extended Chain of Custody** can be entered to show if a piece of evidence was collected and transferred prior to entering the evidence. Click the black **Add** button to add one or more transfers if necessary. The **Custody From** and **Custody To** fields are tied to system users; however, you can leave one or both of these fields blank then add the data to comments.



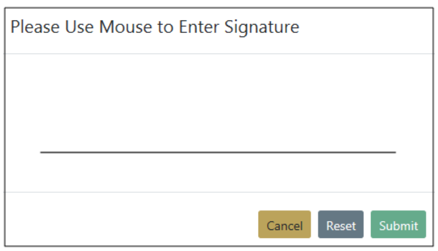
Note: In a multi-tiered agency the *Location* list filters based on the selected agency.

Under **Evidence/Held Property Processing** section, select a **Processing** option from the drop-down list and enter **Comments**. Click the green **Add** button to add it to the incident. Click the **plus sign** to the left of the Evidence/Held Property Processing label to add additional processing methods if needed.

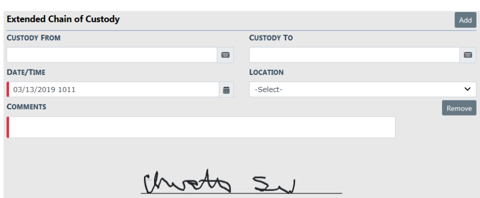
Note: Your agency administrator has the option to set the *Evidence_Processing_Required* maintenance value to **Y** to require at least one processing record when adding evidence/held property records.



Select the **Signature** button to open the signature window.



Sign for the custody change using the mouse then select **Submit** to apply the signature.



Select the **Save** button.

Click on the **Print Evidence/Held Property** button to print *Labels*, *Receipts*, or *Chain of Custody* from the current screen, or print at a later time.

Note: For more information on printing *Labels*, *Receipts*, or *Chain of Custody* refer to "Print Labels, Receipts, Chain of Custody" on page 239.

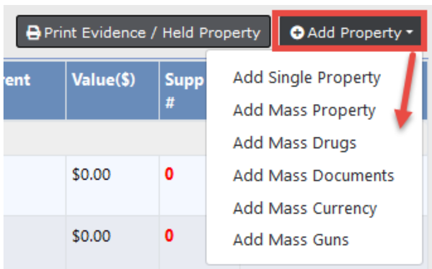
Select the **Finished - Go To Next Section** button to proceed to the next tab.

Note: A warning message displays to unauthorized users who attempt to remove *Property* from the **Incident Report** that is processed as *Evidence/Held Property*.

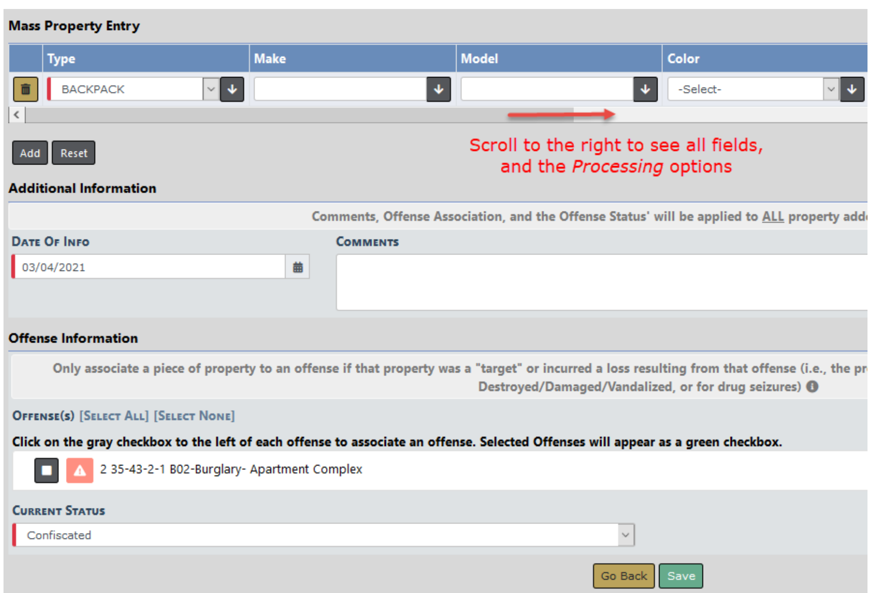
Note: For information on the *Evidence/Property Management Module*, refer to "Evidence/Property Mgmt Module" on page 497.

Mass Entry

All five property **Categories** support **Mass Entry**, a form that allows you to enter multiple property records on the same screen. Click on the **Add Property** button to display a list of **Categories** from which to choose.



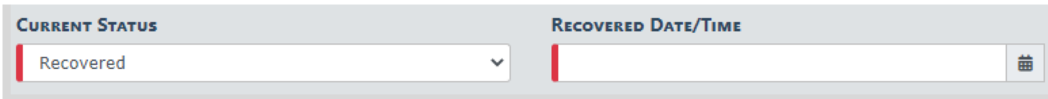
Select a mass category from the list to open the associated Mass Entry form. *Add Mass Property* is used in the example.



Note: The offenses that require at least one property appear in red, otherwise they appear in black.

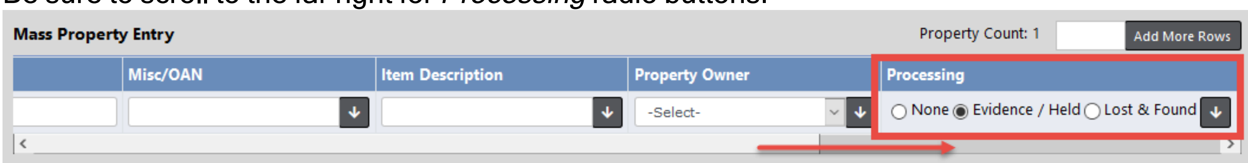
If you select *Recovered* as the **Current Status**, a **Recovered Date/Time** required field appears.

Note: On setting status to **recovered**, RMS allows the user to capture recovered date and address and select an address from a list of all locations associated with the report.



Enter the property details in the fields provided; be sure to scroll to the right to see all fields. See "Evidence/Held Property" on page 230 for instructions on entering the details.

Be sure to scroll to the far right for *Processing* radio buttons.



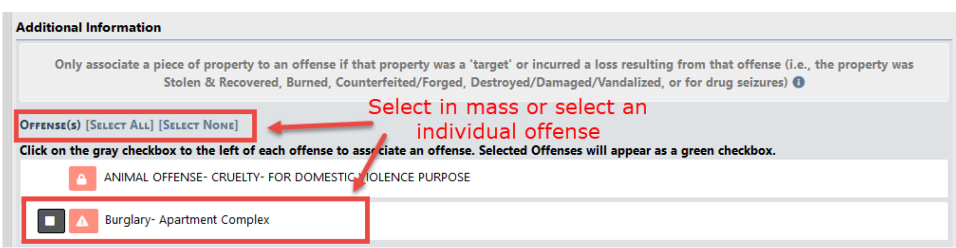
Add additional property rows if needed.

There are two ways to add additional property:

- To add one row, click the **Add** button on the left.
- To add multiple rows, enter the number of rows you want to add in the text box next to the **Add More Rows** button, then click the **Add More Rows** button.

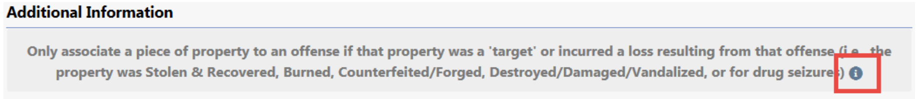
Select the **Current Status** and, the **Date of Info** if different than the default, and any **Comments**.

You can associate all property listed with all offenses, none, or a specific offense.



After selecting offense option, enter additional information if prompted.

When an offense on the report requires a property or vehicle association, validations are in red advising of the requirement. Make note of the instructions indicating what property should be associated to what types of offenses. Hovering over the blue information bubble will provide examples.

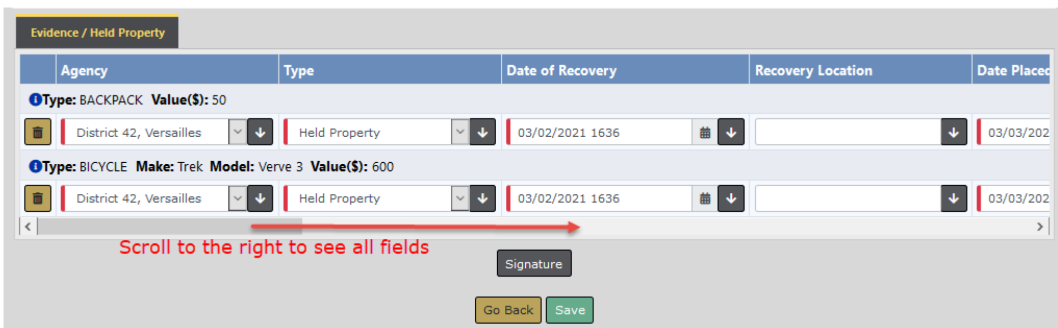


Note: You can associate property to an offense later by clicking on the edit icon under the Actions column on the *Property & Vehicles* tab.

Click the **Save** button.

If you selected the **Evidence/Held** radio button on one or more property items, click **Yes** to enter the items as evidence/held property when prompted.

- The *Evidence/Held Property* screen opens where those are listed in mass.

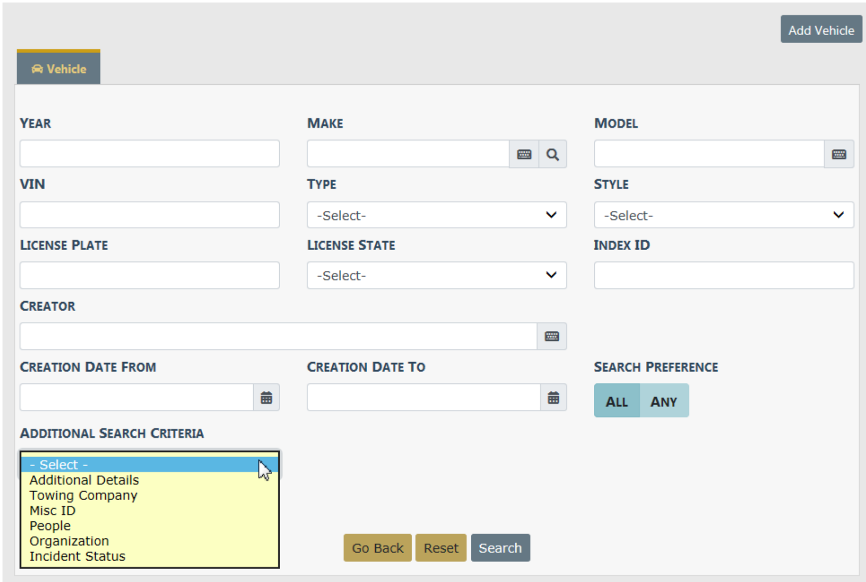


- Enter the information in the fields provided, and be sure to scroll to the right for all fields.
- Select the **Save** button.

You are taken back to the **Property & Vehicles** tab for review.

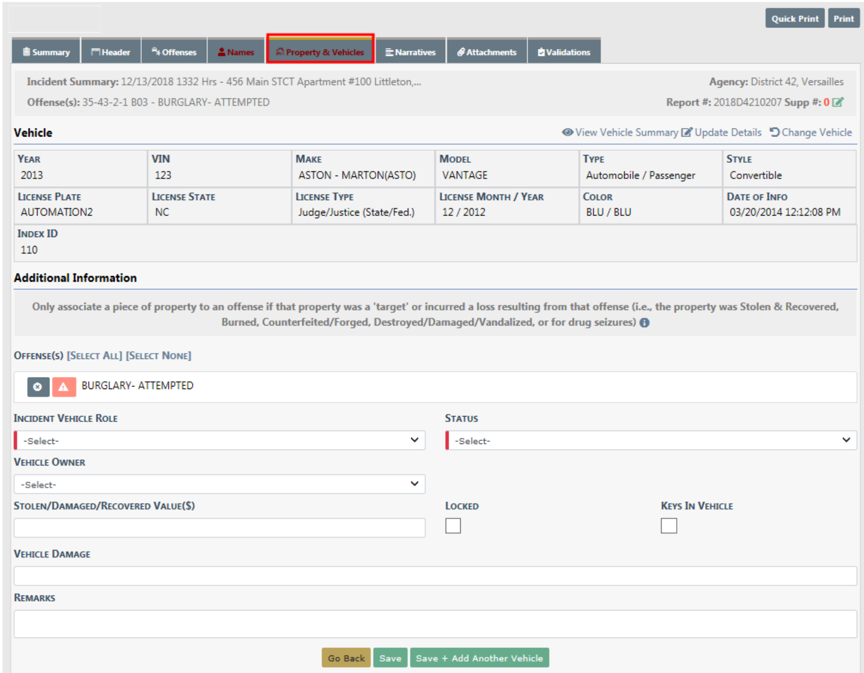
Add Vehicle

Selecting the **Add Vehicle** hyperlink will display the **Search Vehicle** screen.

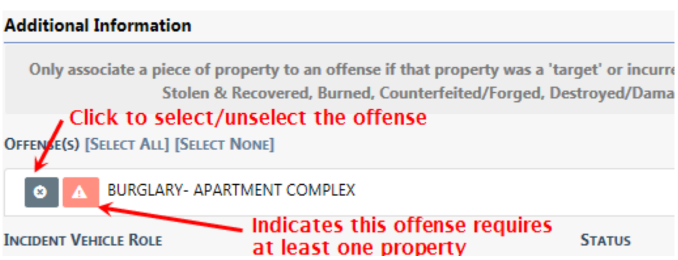


Note: Always search the Master Indices prior to adding a new record. Search as broadly as possible to yield more results and Refine Search as necessary to narrow the search. This helps to prevent duplicated records for the same Person, Address, Vehicles, etc. in the Master Indices, and it keeps all RMS system activities related to the record in a centralized location.

The search results display either a list of records matching the search parameters or will indicate that there were no results found. If the desired record is listed you can select the existing record as the victim for the report. Best practice is to review the information by clicking on the VIN or Index ID to review the information and verify it is up to date prior to selecting the record for the report.

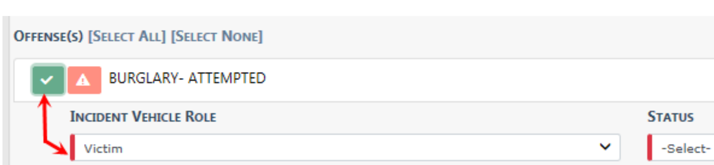


When an offense on the report requires a property or vehicle association, validations appear in red advising of the requirement. Make note of the instructions indicating what property should be associated to what types of offenses. Hovering over the blue information bubble will provide examples.



Crime Not Selected/Associated

Crime Selected/Associated



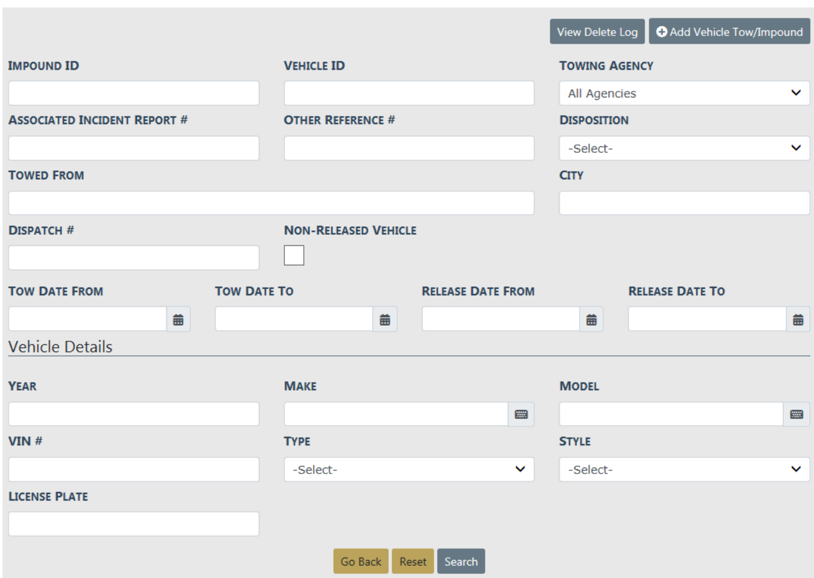
Once all this information is completed select either the **Save & Add another Vehicle** button to add more property or the **Save & Continue** button to return to the **Property & Vehicles** tab for review.

Once all Property & Vehicle have been added, select the **Finished – Go to Next Section** to advance to the **Narrative** tab.

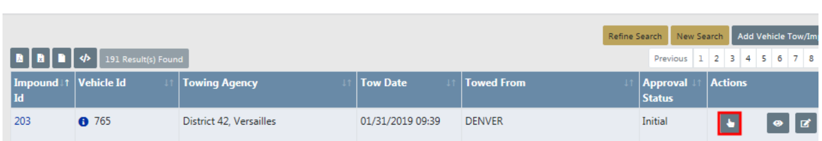
Add Existing Impound

Vehicle Tow/Impound can be associated with an Incident. However, the Tow/Impound grid will not appear on the Incident screens is the Agency is not using the Tow/Impound module.

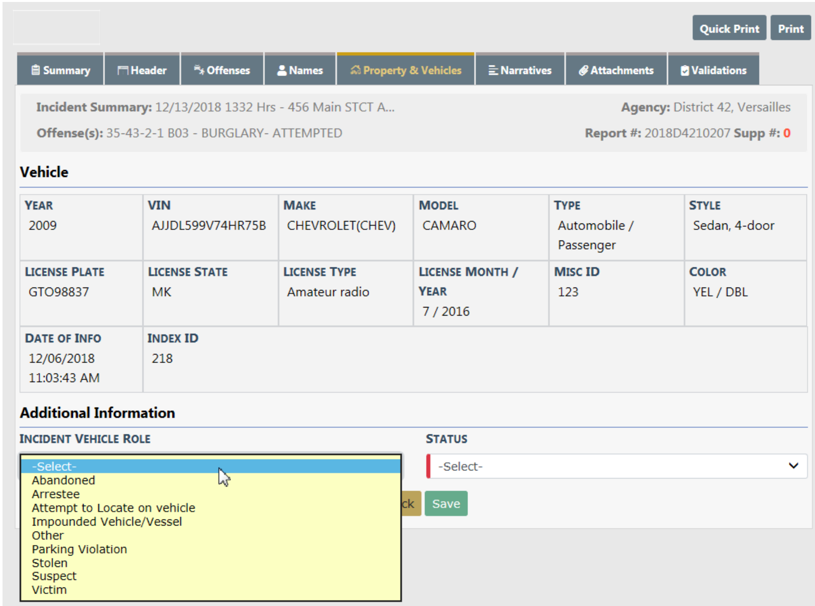
Selecting the **Add Existing Impound** hyperlink displays the **Vehicle Tow/Impound Search** screen.



Enter the necessary data to search for the record needed, then click the **Search** button to view the results.

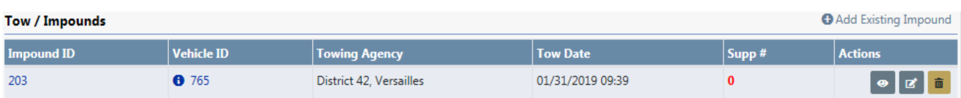


Click the **Select** icon  to select the record and to open the **Associate Incident to Vehicle Tow/Impound** page.



Select the proper **Incident Vehicle Role** and **Status** from the lists, then click the **Save** button.

The Tow/Impound record is now associated to the Incident.

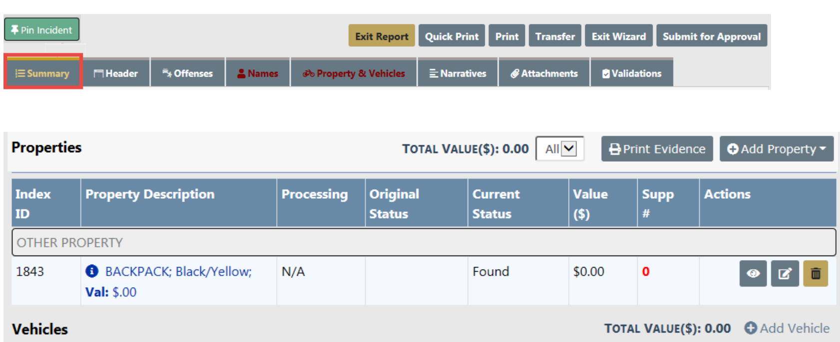


Print Labels, Receipts, Chain of Custody

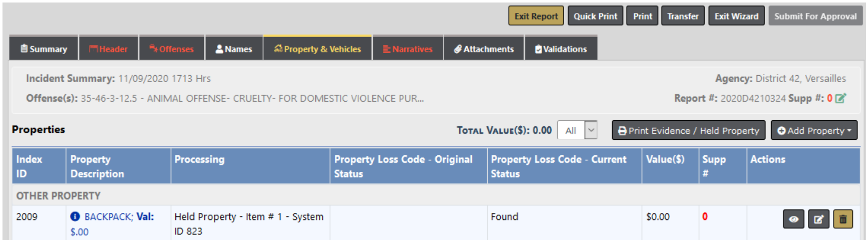
After all the property and evidence have been entered you can review the property, evidence, or held property entered on the report. If evidence or held property exists, you have the ability to print **Labels**, **Receipts**, and **Chain of Custody**.

There are two access points to print labels, receipts, and chain of custody:

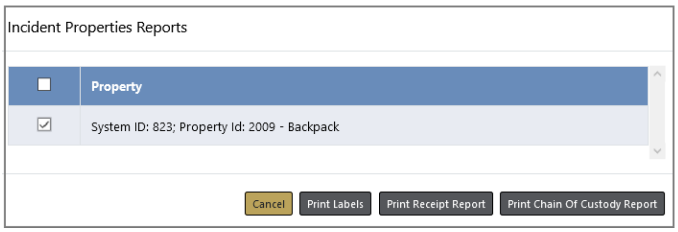
- The **Summary** tab of the Incident Report, then scroll down to the **Property** section.



- The **Property & Vehicles** tab of the Incident Report.



Select **Print Evidence/Held Property** and the *Incident Properties Reports* window displays.



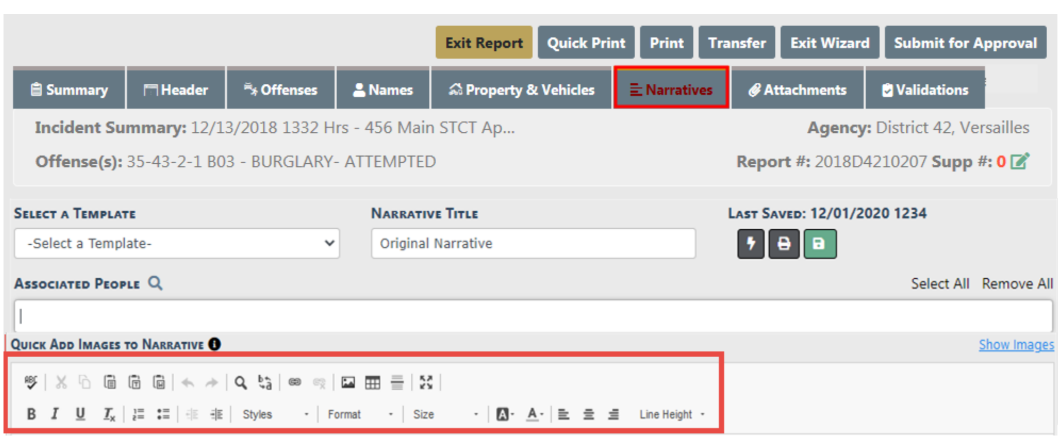
Select which properties to include, then select the **Print Labels** button.

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

> **Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

Narrative Tab

While on the **Narrative** tab, click on the **Add Narrative** button to open the Narrative entry screen where there is a built-in editor with formatting tools that supports grammar and spell checking, and provides the ability to format the body of the narrative.

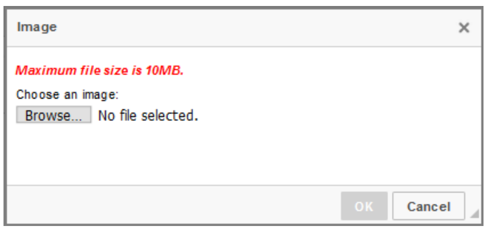


You can insert an **image** directly into the Narrative. Before you insert an image, click into the body of the Narrative where you want to place the image.

There are two ways to insert an image on the Incident Narrative:

1. Click on the **Image** icon on the tool bar.

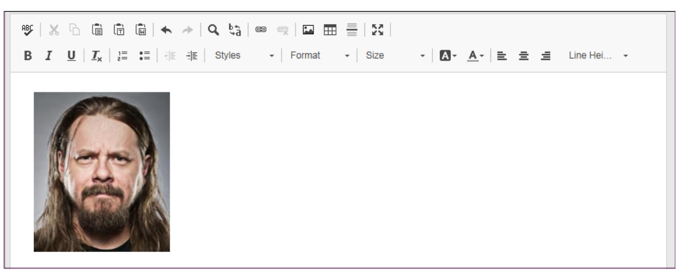
A dialog window appears giving you the option to select a file.



Click **Browse** then select an image file and click **Open**.

Select the **Image Size**, then click **OK**.

The image inserts into the body of the narrative.

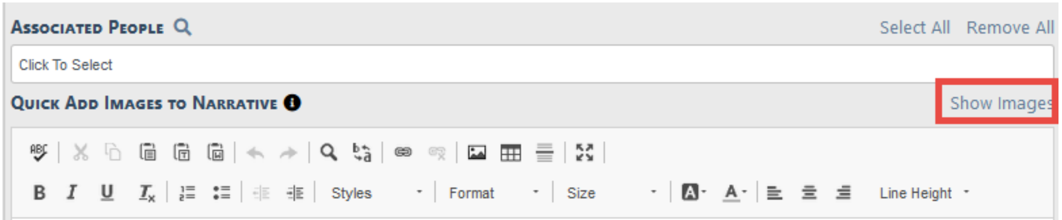


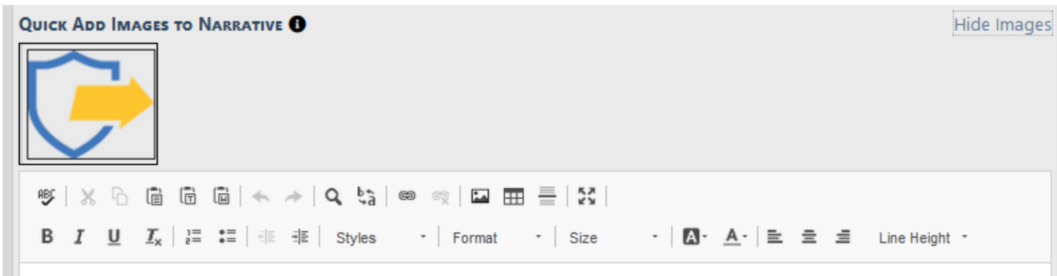
To *remove the image* from the body of the narrative, click on the image then press the **Delete** key on your keyboard.

2. Insert image from your **Image Library**.

Note: This option is not available when entering Arrest or Case Narratives.

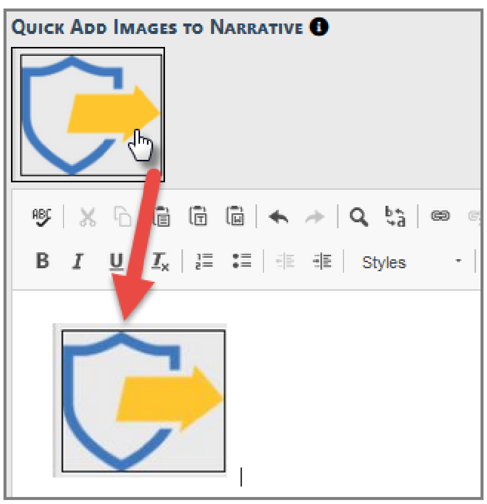
Select the **Show Images** link to display the images in your personal Image Library.



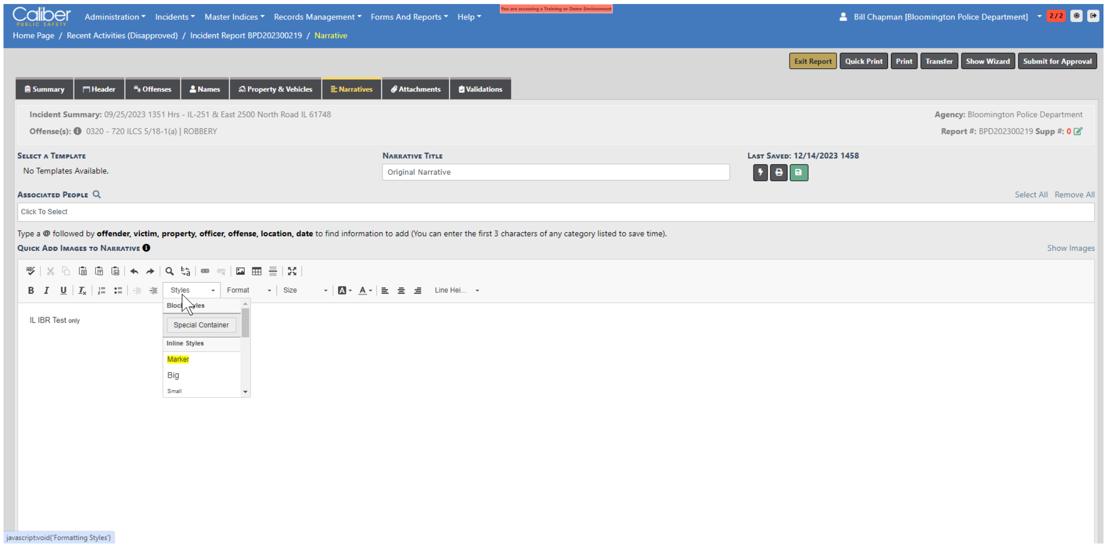


To hide the photos, click the **Hide Images** link on the upper right.

Click on the **image** to select and insert it into the Narrative.

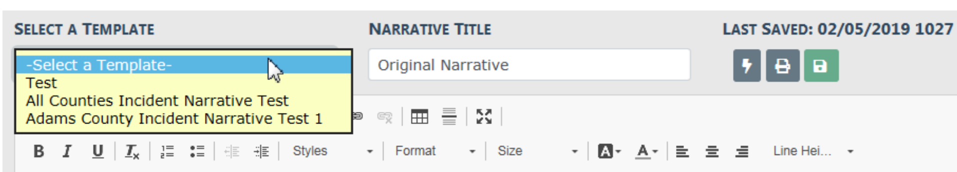


The **styles editor** allows you to format elements within the narrative. Starting with RMS 11.15, this includes a style for **redact** (which operates similar to **marker**, but highlights black instead of yellow).



The built-in *Spelling and Grammar Checker* identifies mistakes and corrects them as you type your narrative.

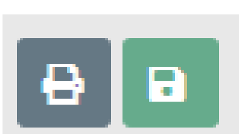
Some agencies may use **Narrative Templates** to guide you in creating their narrative. If a template is selected, the information will be applied to the narrative for you to complete and edit as required.



The **Narrative Title** will default to *Original Narrative* but you may edit the title if necessary.

Select **Associated People** to associate the Incident persons to the Narrative. Select as many that apply.

There are icons for printing the narrative and for saving the narrative which can be used at any time while the narrative editor is open.



As the narrative is being typed, the system auto-saves the narrative every sixty seconds in the event the connection is lost or the computer becomes unusable. The system will also provide auto-complete options as you type to make data entry easier and faster.

If the application attempts to save and is not able to reach the server, you are presented with a Warning indicating the connection may be lost. Navigating away from this screen may cause you to lose up to 60 seconds worth of your narrative. Simply reestablish your connection and select the **Click Here to Try Again** link so the narrative can be saved to the server and continue the auto save feature.

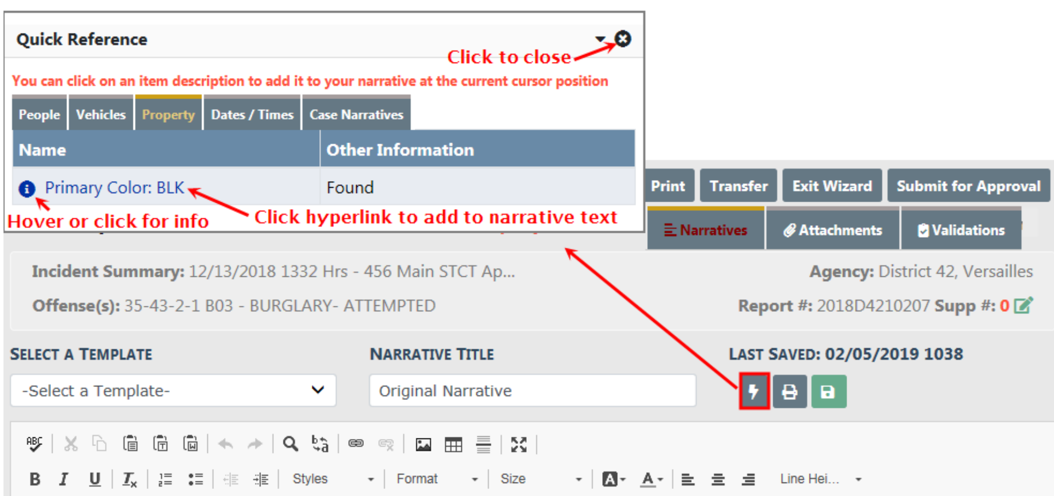
You should only have one workstation logged in to Online RMS at any given time.

If you have two workstations open on the Narrative screen, the first session open to the Narrative page is saved in Online RMS. If you write a lengthy narrative on the second open session, it does not save on your report.

> **Note**: Always **Save and Exit** your Narrative when leaving the computer for any length of time, or move to a different computer to complete your report.

The **Quick Reference** icon is a hyperlink that displays a window in the upper left hand corner which provides easy access to all the people, organizations, vehicles and property, and case narratives within the incident report.

> **Note**: If no items exist for a particular tab, that tab does not appear. For example, if a Case Narrative does not exist with an associated Case, then the Case Narrative tab does not appear.



The **Quick Reference** window contains blue hyperlinks. By clicking on the blue hyperlink you add that particular information directly into your report's narrative in the area where your cursor is located.

You may also place your mouse over the blue information bubbles to see additional information.

Note: You may also type the **@** symbol followed by the first few letters of the field you want, such as **@Off**, **@Loc** etc. directly in the narrative text. This will bring up quick references to add into the narrative.

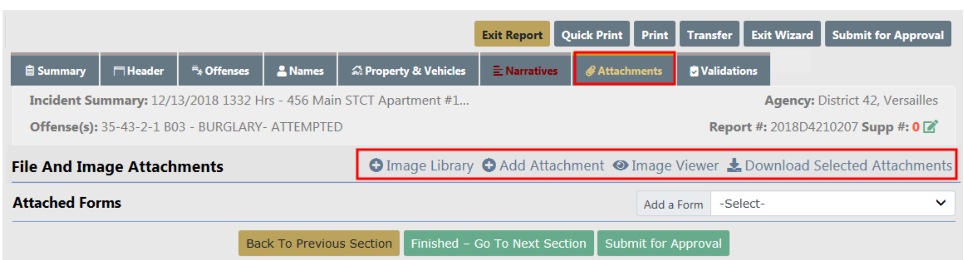
Once the narrative has been completed you can select the **Save & Continue** button which will display the **Narrative** tab for review. Additional narratives may be added to the report by selecting the **Add Narrative** link to the top right which will open a new narrative entry screen.

Note: If the agency is configured to bring over notes from CAD, you will see those narratives listed. You can view, edit, or delete the existing narrative as needed. A new narrative can be added by selecting the **Add Narrative** link.

When you have completed the narrative(s) for the report, select the **Finished - Go To Next Section** button to navigate to the **Attachments** tab.

Attachments Tab

The **Attachments** tab is used to capture incident related attachments such as crime scene photographs or statements, and you can download existing attachments. This is also the location where *Custom Forms* can be completed if the agency is using them.



To add a file or image as an attachment, select the **Add Attachment** hyperlink. For more information on adding and downloading attachments, refer to "Attachments" on page 69.

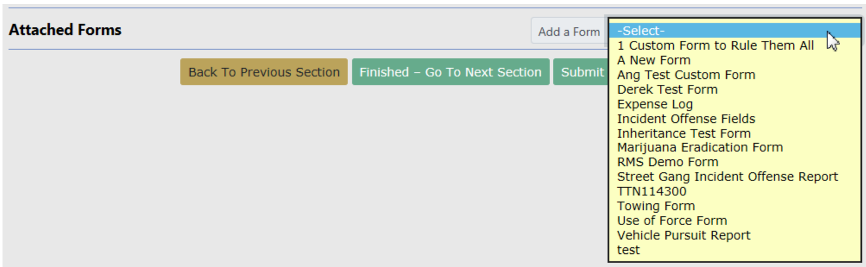
To add an image file from your personal Image Library, select the **Image Library** hyperlink. If images do not exist in your Image Library, then the hyperlink does not appear. For more information on the Image Library, refer to "Image Library" on page 75.

To view an image, select the **Image Viewer** hyperlink.

When all attachments are saved and closed the system returns to the **Attachments** Tab where the files will be displayed.

There are icons next to each file in the *Actions* column that allows you to download, view, edit, and delete the file.

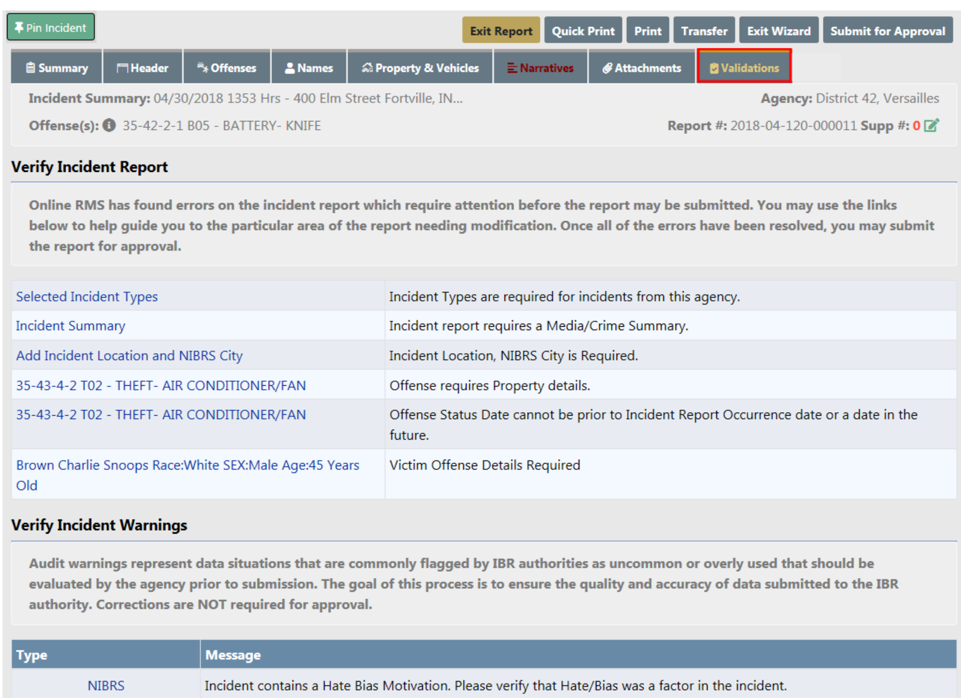
Agency Forms can also be completed in the attachments section of the incident report. Select and complete the form from the drop-down menu. Refer to your administrator for details.



Select the **Finished - Go To Next Section** button to advance to the **Validations** Tab.

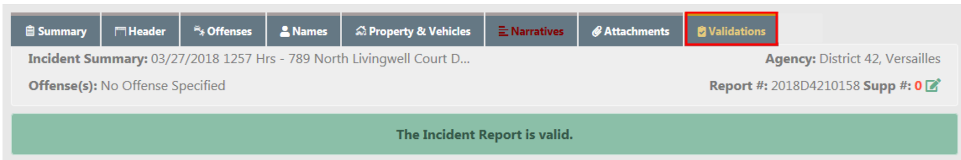
Validations Tab

The **Validations Tab** allows a final check of your report to ensure the minimum requirements are met based on the offense(s) entered on the report. The validation check occurs automatically when navigating to the **Validations** tab. The validation process verifies all the minimum requirements are met, then lists information still required for the report along with a hyperlink to that section of the report



Click on each hyperlink in blue to correct the errors. After each correction, click **Save**, **Continue**, or **Update** (the button differs on each form) to return to the Validations page, or click **Return to Incident Validation** to return without saving.

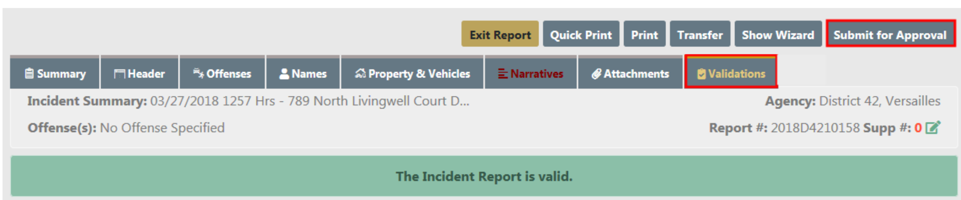
A message appears in the **Incident Validations** tab when the report passes all validations.



Once the report is valid, submit it for approval. For more information on submitting for approval, refer to "Submit For Approval" below.

Submit For Approval

When the report passes all validations, it is ready for approval submission. Submit the report for approval by selecting the **Submit for Approval** button located at the far right hand of the screen just above the tabs.

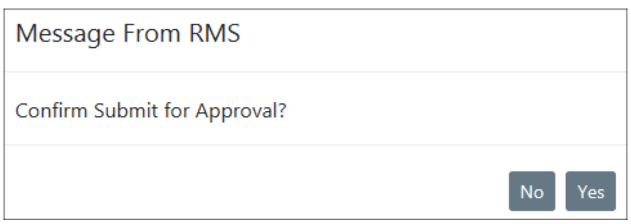


Users with approval authority will receive a message to either approve or submit the request.

By selecting the **Submit** button, the **Submission** screen appears. The *Approving Agency* defaults to your home agency and the *Approving Group* defaults to the *Approving Supervisor*. A text box is provided to supply additional information for the *Approving Supervisor*. Select the **Submit** button for submission.

Note: Only a multi-tiered agency user will have the added ability of selecting the *Approving Agency* to direct the report for approval to the agency where the report was taken.

Select **Yes** to submit for approval.



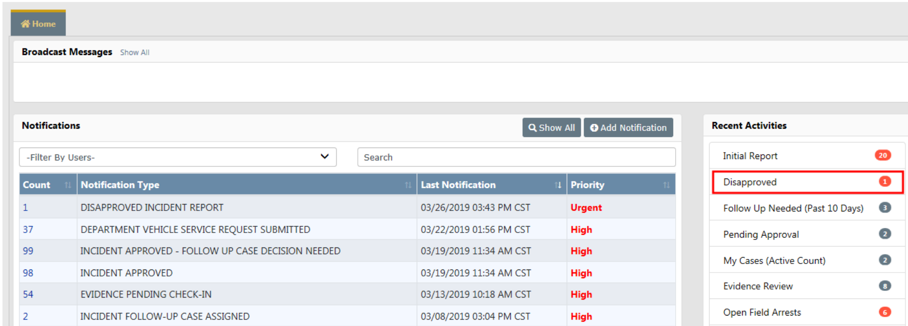
The *Approving Supervisor* receives notification that the Incident Report needs approval. For more information about the approval process refer to "Approve/Disapprove Incident Report" on page 427.

There may be times when the *Approving Supervisor* **disapproves** the Incident Report and routes it back to you for more information or to make corrections. After making corrections, you have an opportunity to resubmit for approval. For more information, refer to "Disapproval Notice Corrections" below.

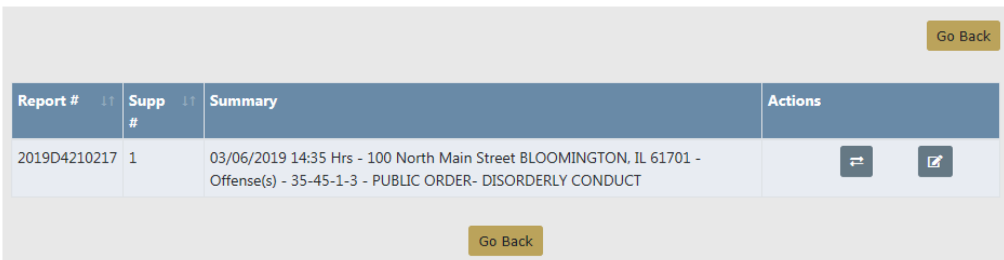
Disapproval Notice Corrections

The *Approving Supervisor* may **disapprove** the Incident Report and route it back to you for more information or to make corrections. You will then have an opportunity to make the necessary corrections and resubmit for approval.

The Recent Activities section of your Home page displays those that have been disapproved.

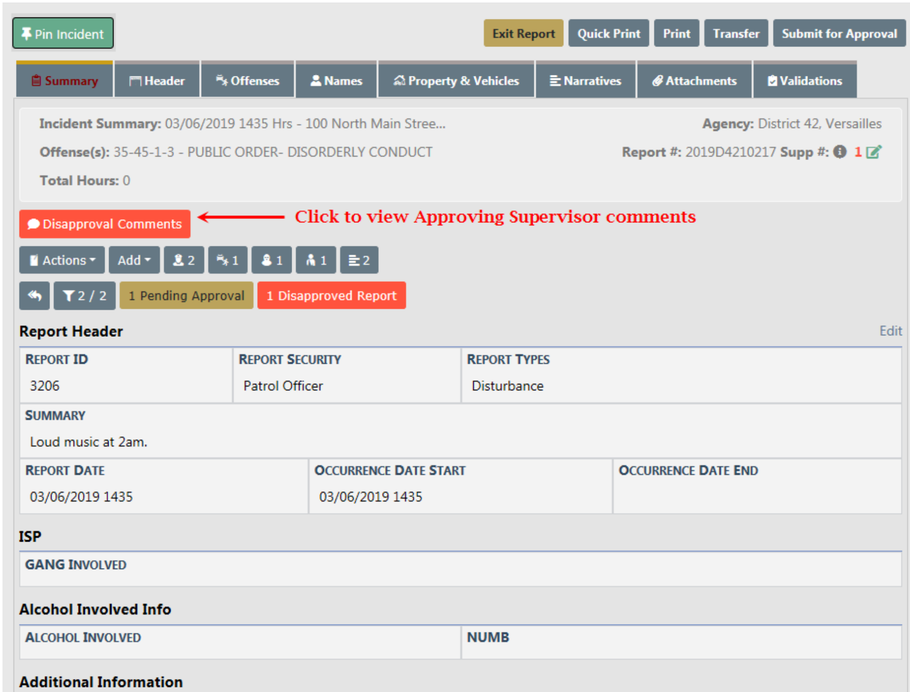


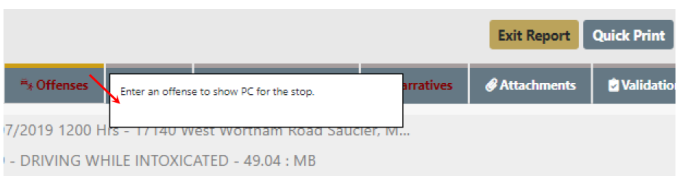
Click the **Disapproved** link to display a list. The number of incidents that appear in the list match the disapproved number that displays in Recent Activities.



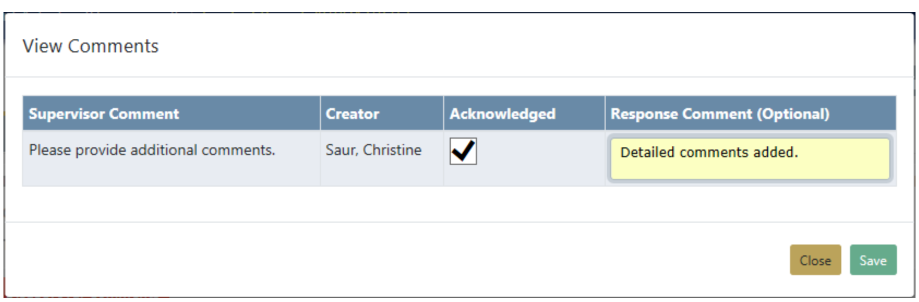
Click the transfer icon to transfer the incident to another user, or click the edit icon to make changes to the incident.

The *Incident Report* opens if you chose to edit. Click the red **Disapproval Comments** button to view the *Approving Supervisor* comments, or mouse over tabs highlighted in red to view disapproval comments associated with that tab.



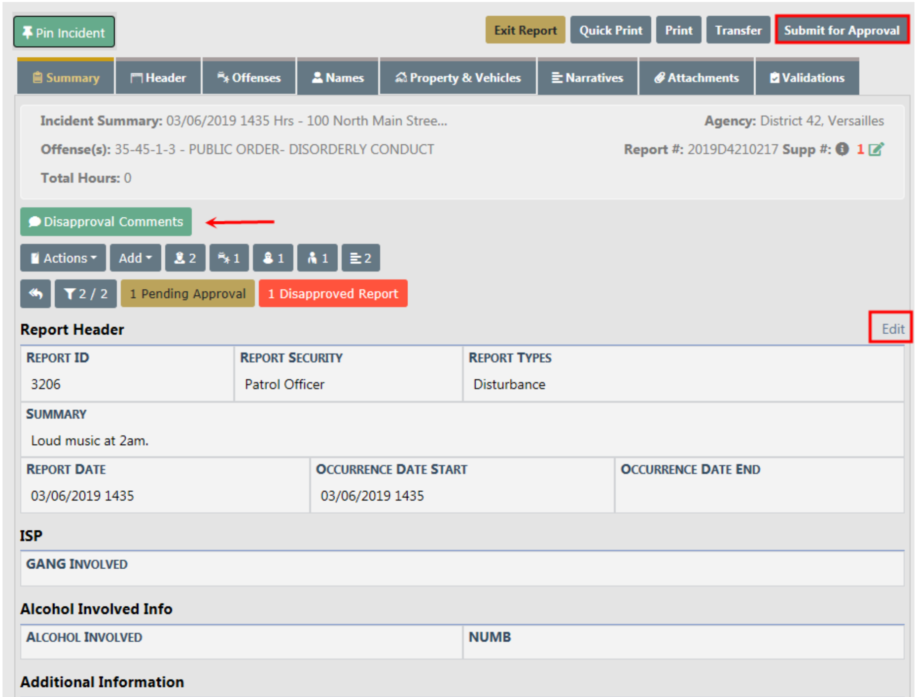


Review the supervisor comments and check the **Acknowledged** box. Add **Response Comments**, if any, then click **Save** to return to the *Incident Report* page.



Note: All disapproval comments must be acknowledged prior to submitting report for approval.

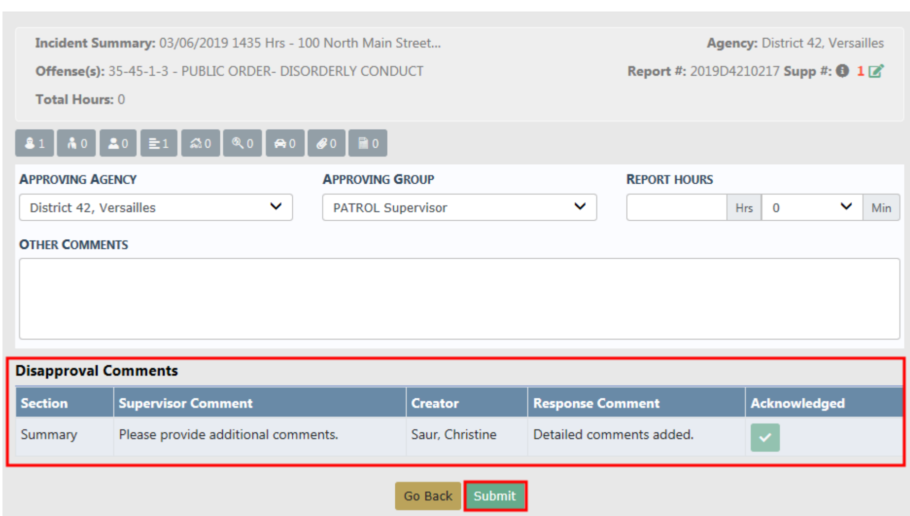
On the *Incident Report* page, click **Edit** on the top right of applicable sections to make any necessary changes.



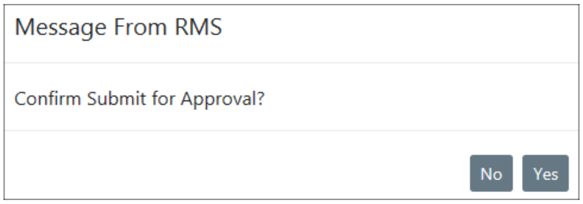
Note: The **Disapproval Comments** button turns green when supervisor disapproved comments are acknowledged.

Click the **Submit for Approval** button on the top right of the *Incident Report* page. For more information on submitting incidents for approval, refer to "Submit For Approval" on page 247.

Click the **Submit** button on the bottom of the *Submit for Approval* page. Notice the disapproval comments and responses appear on the bottom of the page.



Select **Yes** to submit for approval.

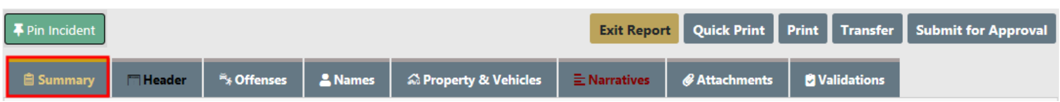


The *Approving Supervisor* receives notification that the Incident Report needs approval. For more information about the approval process refer to "Approve/Disapprove Incident Report" on page 427.

Click **Go Back** to return to your Home page.

Summary Tab

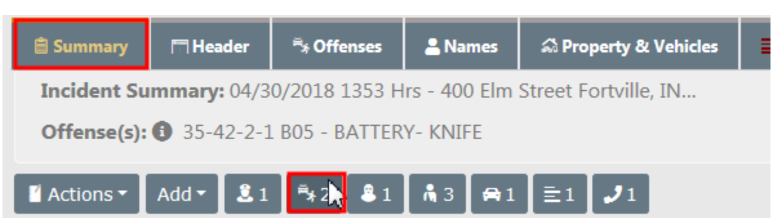
The **Summary** tab contains a summary of all the information that is contained in the other tabs of the current Incident Report.

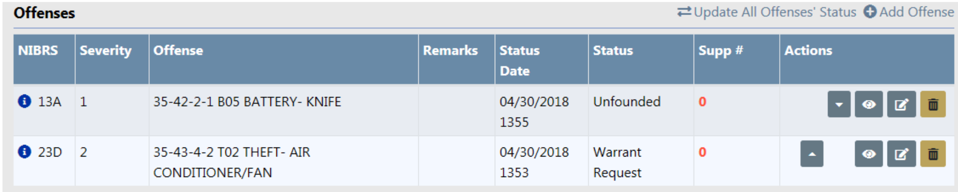


Information in the **Summary** tab is divided into sections, such as Officers, Employees, Offenders, Victims, Narratives, etc.

The icons under the tab headers and Incident description are hyperlinks that direct you to each section. Hover your mouse over the icon to view a description of the hyperlink.

For example, select the *Offenses* hyperlink and you are directed to the *Offenses* section of the **Summary** tab.




Offenses

⇄Update All Offenses' Status ⊕Add Offense

NIBRS	Severity	Offense	Remarks	Status Date	Status	Supp #	Actions
13A	1	35-42-2-1 B05 BATTERY- KNIFE		04/30/2018 1355	Unfounded	0	
23D	2	35-43-4-2 T02 THEFT- AIR CONDITIONER/FAN		04/30/2018 1353	Warrant Request	0	

Add data to the Incident Report in sections that contain an **Add** hyperlink. For example, the **+ Add Person** hyperlink opens the **Person Search** screen to begin the process of adding a person to the report.

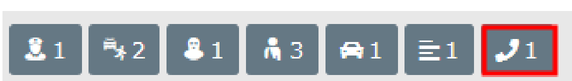
The **+ Add Field Arrest** hyperlink under the Field Arrests section provides the ability to associate a *Field Arrest* to the report, or you can create a Field Arrest from the Offender section and associate it to the Incident automatically.

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

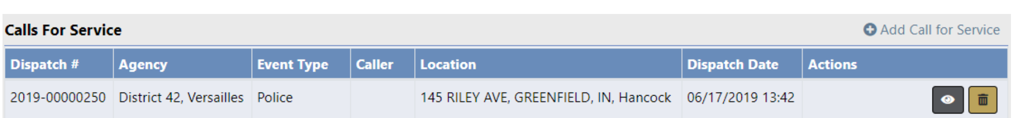
- Click on the **Add Field Arrest** icon next to an offender's name on the **Summary** or **Names** tabs.

- For details on the create and import field arrest process, refer to "Create Field Arrest from Incident" on page 267.

The **Calls for Service** section is located toward the bottom of the **Summary** tab. Page down or click on the icon hyperlink to go directly to the CFS section.



In the **Calls For Service** section, view the associated CFS by selecting the **View** icon under the *Actions* heading, click the **Add Call for Service** link to search for and associate an existing call for service record to the incident, or click the delete icon to remove the association.


Calls For Service

⊕Add Call for Service

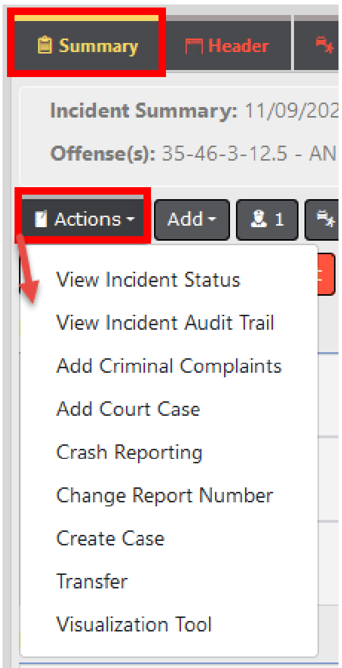
Dispatch #	Agency	Event Type	Caller	Location	Dispatch Date	Actions
2019-00000250	District 42, Versailles	Police		145 RILEY AVE, GREENFIELD, IN, Hancock	06/17/2019 13:42	

- The **Add Call for Service** link appears for any user able to edit the incident report.

- The delete icon appears when the user is the original creator of the association or the user has permissions to delete the association.

- When deleting the association, a prompt appears asking you to enter a **Comment** as to why you are deleting the association. The comment, report number, and dispatch number are stored in an audit table.

The Summary tab also contains an **Actions** button that allows you to perform certain actions. Click on the button to view a drop-down list of choices from which to choose. This list is based on permissions and varies by agency.



Note: Authorized users can add attachments to supplement 0 while outside the normal approval workflow and when the Incident is not in edit mode. For details, refer to "Add Attachments Outside Incident Workflow" on page 284.

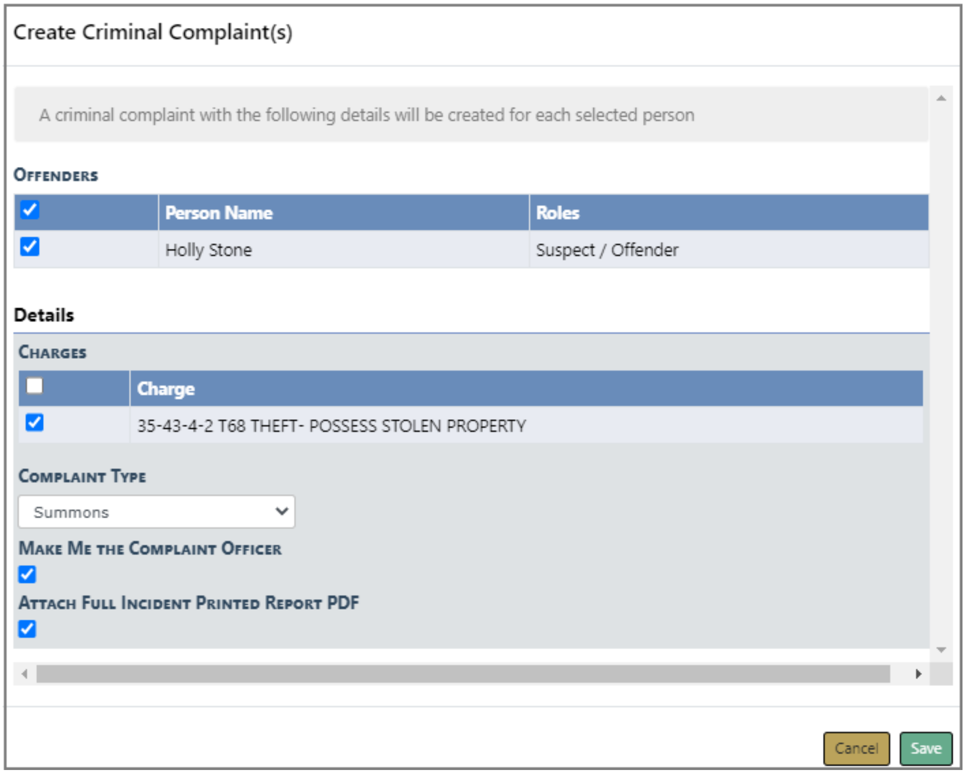
Add Criminal Complaints

This option is available providing you have the appropriate permissions and the feature is turned on for your agency.

Perform one of the following options on the **Summary** tab to add a Criminal Complaint:

- Click the **Actions** menu button, then click **Add Criminal Complaints**.
- or **Page down** on the Summary tab to the Criminal Complaints section and click **Add Criminal Complaints**.

The *Create Criminal Complaint* form opens.



Select the **Offenders**.

- The names listed are only the Incident suspect/offenders that do not already have a criminal complaint associated with the incident.
- A Criminal Complaint is created for each person selected.
- Only displays.

Select one or more **Charges**.

- At least one charge is required.

Select the **Complaint Type** from the drop-down list.

If applicable, check the box to make yourself the **Complaint Officer**.

If the Incident has Custom Forms, an option displays allowing you to select any or all **Custom Forms** to be associated with the criminal complaint.

If applicable, check the box if you want to attach the full **Incident Printed PDF Report**.

- If the Incident has **Custom Forms** and it is configured to create a fillable form, the fillable form PDF is associated with the criminal complaint instead of the custom form.

Click **Save** to create the Criminal Complaints and associate them to the Incident Report supplement automatically.

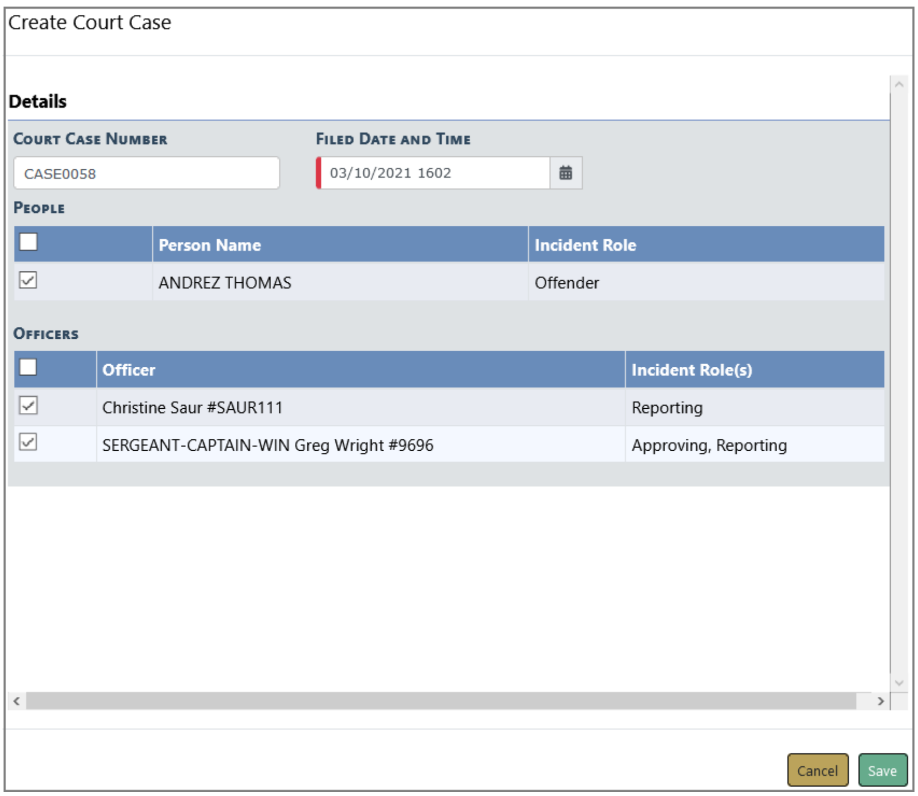
- The complaints are listed in a grid on the *Summary* page. You can further edit the complaint and submit for approval.

Add Court Case

Perform one of the following options on the **Summary** tab to add a Court Case:

- Click the **Actions** menu button, then click **Add Court Case**.
- or **Page down** on the Summary tab to the Court Case section and click **Add Court Case**.

The *Create Court Case* form opens.



Enter the **Court Case Number**.

Select the **Filed Date and Time**.

Select the **People** involved.

Select the appropriate **Officers**.

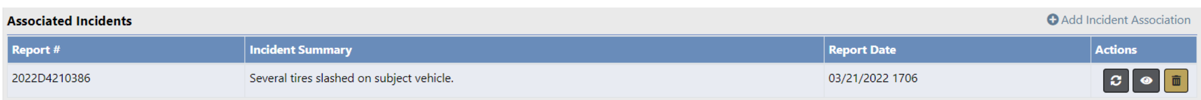
Click **Save** to create the Court Case and associate to the Incident Report supplement automatically.

Add Associated Incidents

You can associate an incident report with another. There are two ways to do this:

- Click on the **Add Associated Incident** link in the *Associated Incidents* section of the *Summary* tab to search for and select an Incident.
- An association to another incident happens automatically during the *Copy Incident* process, if utilized by your agency. For more information on the *Copy Incident* process, refer to "Copy an Incident" on the next page.

From the grid for the associated incident, select the icon to import data from that incident.



When importing incident data, each association will appear with a selection field.

Choose the appropriate role for each association before saving the imports.

Incidents that are hidden do not appear in this grid unless you have proper permissions to view them. For more information on hidden Incidents, refer to "Incident Security" on page 194

Crash Reporting

If configured for your agency, this option is a single sign-on to the Ethos home page for States where the LexisNexis Ethos Crash application is available.

Copy an Incident

If your agency chooses to use this feature, authorized users can copy an existing incident and save it as a new Incident.

Requirements to use this feature:

- Your agency must be using the Incident number generation feature.
- The user's role must be given copy incident permissions and be in the same organization as the incident.

You can copy an incident from edit or view mode from the **Actions** menu on the Incident *Summary* tab.

The process does not copy offense-related information. For example, property or vehicles directly related to offenses do not copy to the new Incident, whereas, they do copy over if they are not offense-related.

The following information can be copied to the new incident:

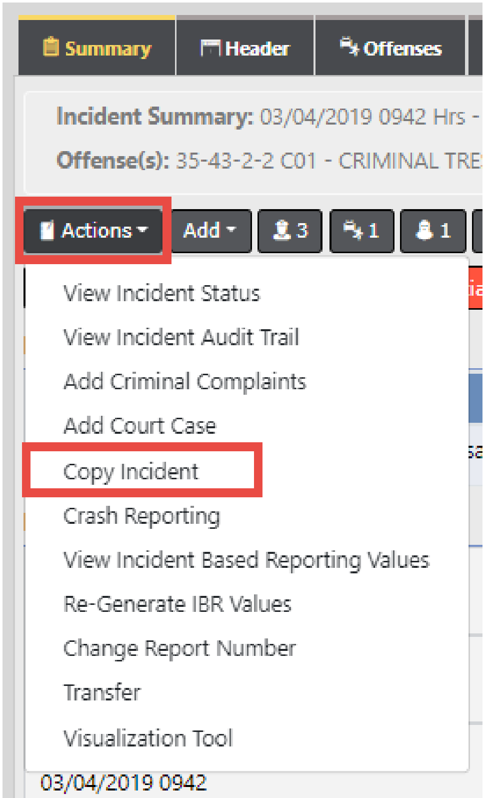
- General information from the header, including custom fields.
- People or organizations.
- Custom forms.
- Attachments.
- Narratives.
- Property and vehicles.

  Only basic information copies to the new Incident at this time; additional information will be included in a future release.
- Employees.
- Offenses.
- Officers.
- Associated CFS and Fields Arrests.

The copy process only copies information from supplement 0. If you are copying information from an Incident that has multiple supplements, the new Incident includes information from supplement 0 and not from subsequent supplements.

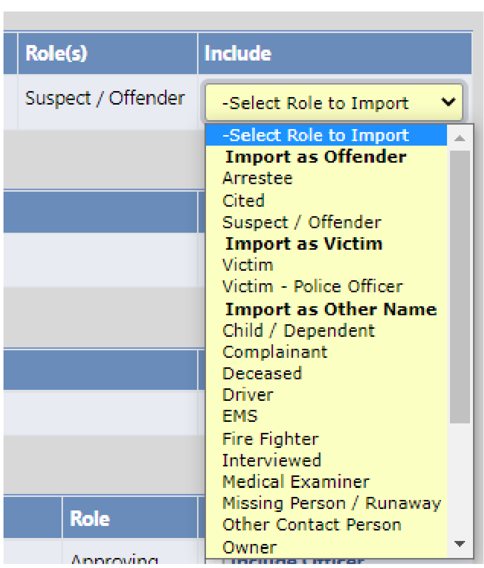
Follow these steps to copy an incident to a new Incident record:

1. View or edit the Incident.
2. Click on the **Action** button on the *Summary* tab, then click **Copy Incident**.



3. The *Copy Incident* screen opens.

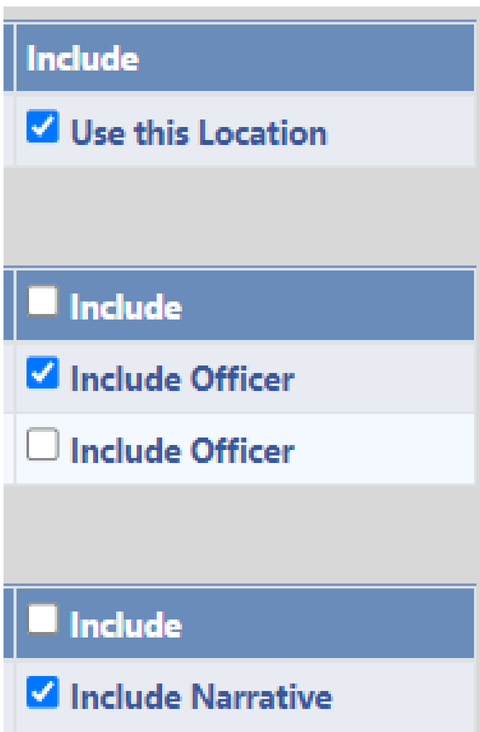
4. For each person and business, select the **Role to Import** into the new Incident. The role could be the same or different on the new Incident than the role on the original Incident. The original role appears in the *Roles(s)* column.



Note: If you do not select a role to import, that name or business does not import into the new incident record.

5. Select the **Location** to copy to the new Incident. This is the main location for the Incident. Only one location can copy to the new Incident at this time.

6. Select all other information you want to copy to the new Incident, such as property, vehicles, officers, calls for service associations, field arrest associations, narratives, attachments, etc. Other than location, you can choose one or multiple within each of the other categories.



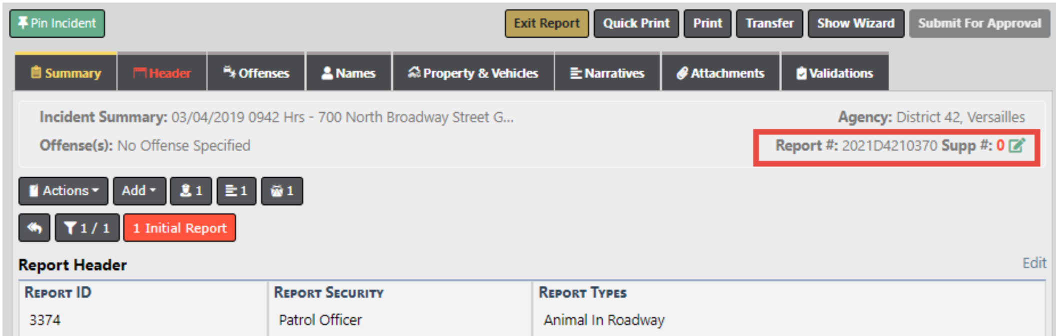
If the Narrative is associated to a person and that person is copying to the new Incident, then the narrative copies with the person. If you choose to copy the narrative but not the person, the narrative copies to the new Incident without the person.

Note: Calls for Service and Field Arrests are the only associated events that copy over to the new Incident (not citations, for example).

7. Make any changes to other information on the Incident, if needed.

8. Click **Save**.

9. A supplement 0 report is created with a new Incident number.



10. The process associates the original and new Incident reports automatically. Page down while on the *Summary* tab to view the association.

You can also associate another Incident by clicking on the **Add Incident Association** link.

Incident Templates

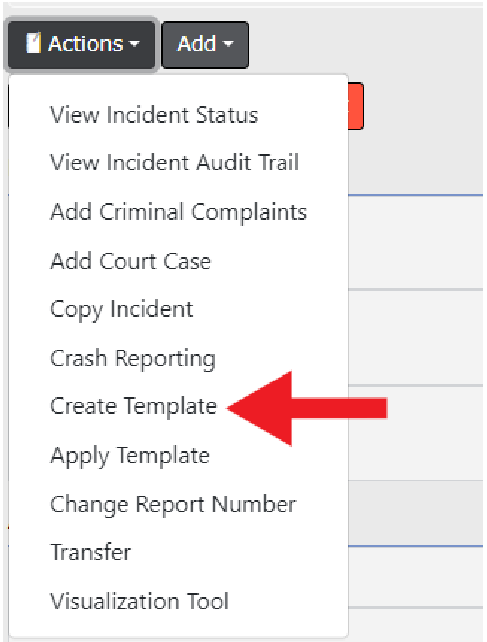
If your agency chooses to use this feature, authorized users (including users who have ownership of the incident to be edited) can create an apply templates to incidents for frequently used incident scenarios and details.

Creating Incident Templates

Follow these steps to create a template.

1. View or edit the Incident.

2. Click on the **Action** button on the *Summary* tab, then click **Create Template**.



3. From the *Create Template* window, enter a template name and description.

4. Using the check-boxes, select the elements from the incident report that you wish to include in the template. The elements that can be included are Medisa Summery, Incident Types, Location, Offenses, Victims, and Narratives.

   Note: You may choose to make a template for your user profile ONLY by selecting the **Limit To My User** check-box. Leaving this box unchecked will create a template available to the entire agency or organization, depending on the user's permissions level.

5. Select **Save** to save the template. You will be prompted to confirm the creation of the template. (Choose **Yes** to confirm or **No** to cancel.)

6. You will see a brief message confirming the template has been created before you are returned to the *Summary* tab.

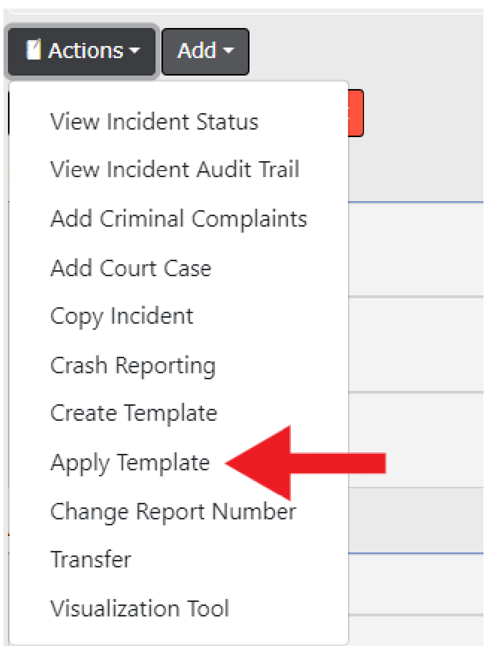
Note: Meta data and custom fields are carried over when creating templates.

Applying Incident Templates

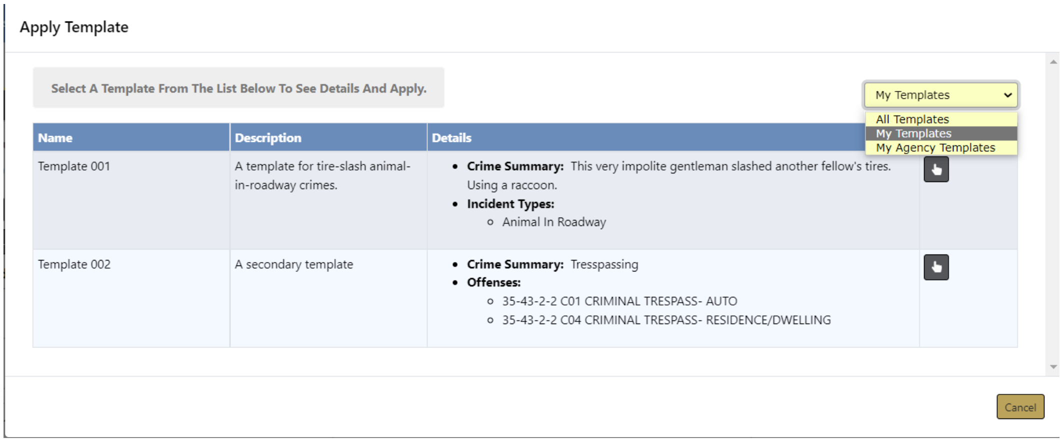
After you have created templates, Follow these steps to apply a template.

Note: Applying a template will only add information to an incident. It will never remove data. Duplicate items will not be added twice, but the user may choose to replace the incident location with the location from the template, if desired. Adding a template adds everything in the template; at this time, there is no option to select individual items from the template to include or exclude.

1. View or edit the Incident.
2. Click on the **Action** button on the *Summary* tab, then click **Apply Template**.



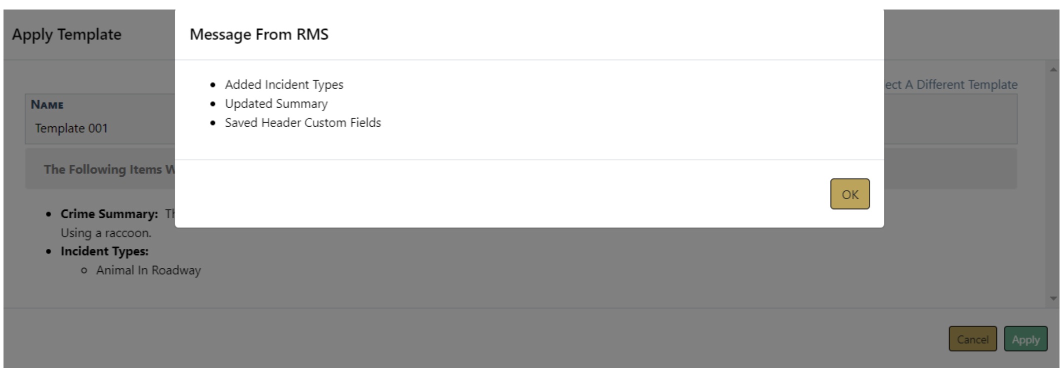
3. A list of templates for your user profile appears. You may choose from among your profile's templates, or use the drop-down window to select an agency template (if available).



4. Select the template you want to apply by clicking the icon. You will be prompted to **Apply** the selected template, or **Cancel**.

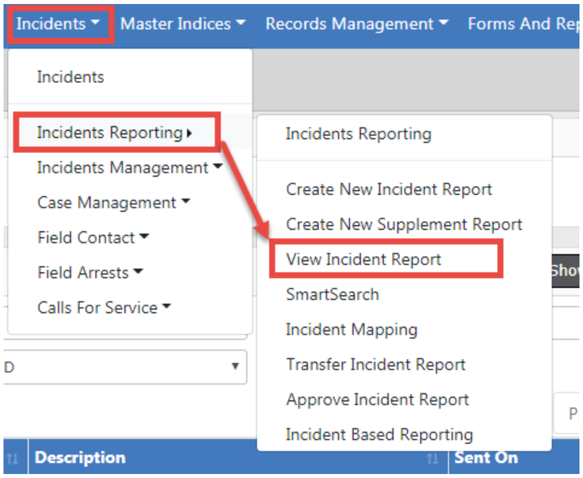
5. If you click **Apply**, you will be prompted to click **Yes** to confirm or **No** to cancel.

6. If you click **Yes**, a confirmation screen will display, showing you which elements have been brought over from the applied template.



View Incident Reports

The option to **View Incident Reports** is in the Incidents menu.



A **Incident Search** window opens, where you can search for a particular incident to view by entering data in any field or combination of fields. For more information on incident searching, refer to "Incident Search" on page 270.

Click on the view icon  in the incident Search Results to view the Incident Report.

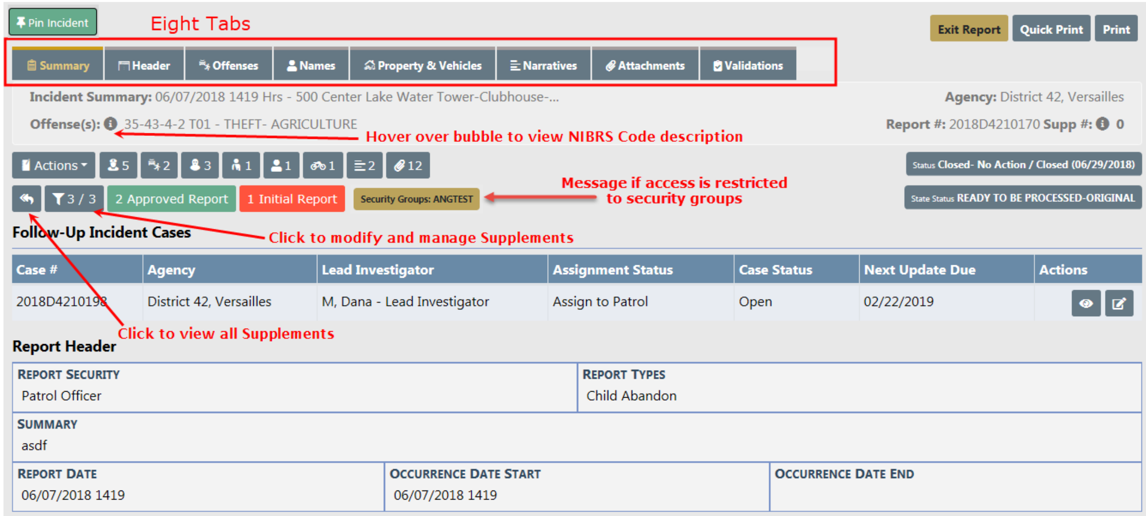
The *Summary* tab opens by default. If the report has more than one Supplement, the number of Supplements are listed next to the  icon.

Note: The *Summary* tab will also advise if a follow-up Case has been assigned to the incident.

Note: With appropriate permissions, an investigative case can be created directly from an *initial unapproved* Incident report using the **Actions** button.

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

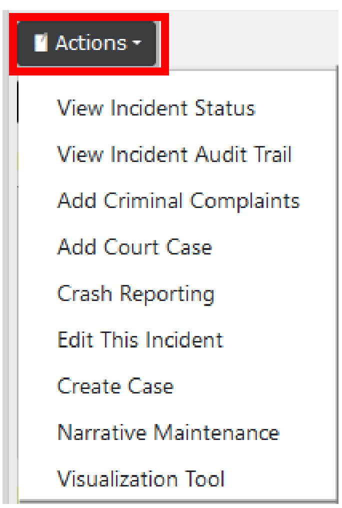
For more information on the *Summary* tab, refer to "Summary Tab" on page 252.



Click on each tab heading to navigate to the different tabs of the Incident report.

> **Note:** With appropriate permissions, you can *Pin* the Incident while on the Summary tab to add it to your Home Page for quick reference. For more information, refer to "Incidents Overview" on page 189.

Click on the **Actions** button to perform additional tasks shown.



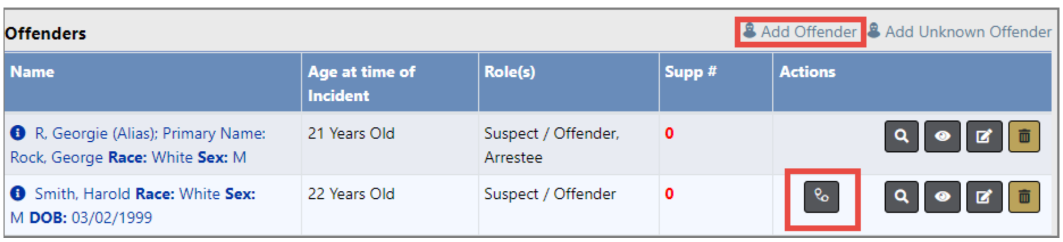
Create Field Arrest from Incident

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

You can initiate this process two ways from the Incident:

- When the **Add Field Arrest** icon appears next to an existing offender's name. This can be done from the Summary or Names tab of the Incident.
- When you add an offender to the Incident

Note: The icon only appears on offenders who do not already have an Arrest associated with the Incident.



Follow these steps to initiate the process to create the Field Arrest and import Incident data:

1. Choose one of the following options:

   a. Click on the **Add Field Arrest** icon of an existing offender.

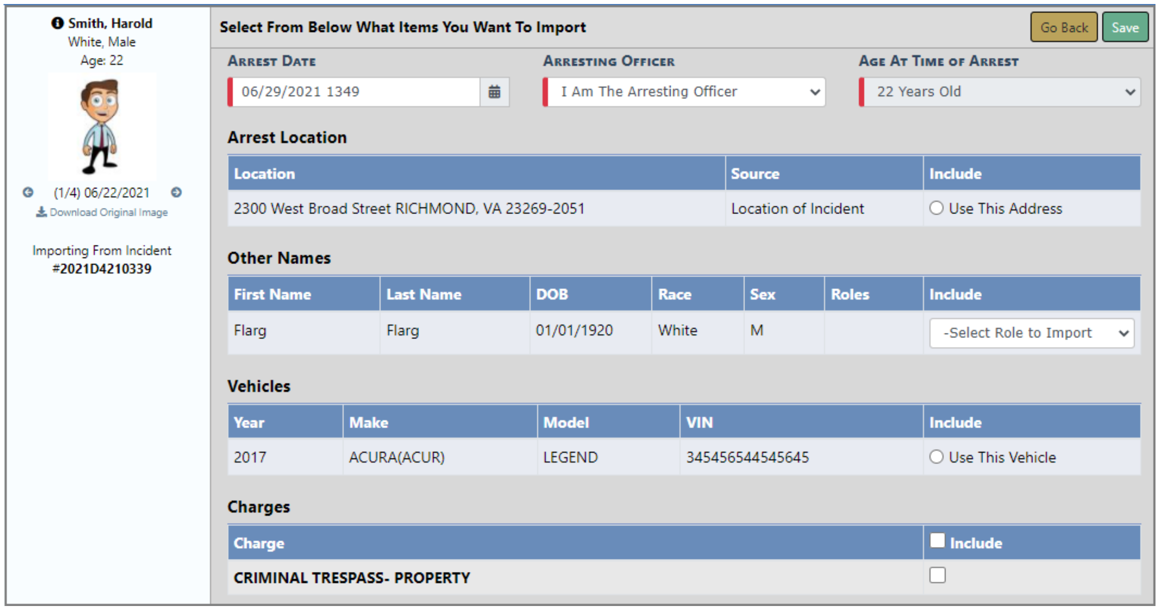
   b. Click on the **Add Offender** link and follow the normal process to add the offender. For details, refer to "Names Tab" on page 218.

   When finished entering offender information, a prompt appears asking if you want to create a Field Arrest for this offender.

   Click **Yes**.

2. The *Import and Create Field Arrest* screen appears, prepopulated with the Incident data that can import into the arrest.

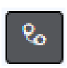


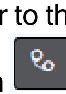
3. Make any necessary changes to the data in the fields provided and make the appropriate selections.

   For details on the *Import and Create Field Arrest* screen, refer to "Create Field Arrest and Import Data" on page 365.

4. Click **Save** then **Yes** to confirm creation of the Field Arrest.

5. The process creates the Field Arrest record and associates the Field Arrest record to the Incident automatically. The association appears on the Summary tab of the Incident.

6. The process updates the existing offender on the incident with the role **Arrestee** and the **Add Field Arrest** icon  no longer appears next to the offender's name since they are now listed as an offender on the Incident.

   If you are creating a new offender, the process adds that offender to the Incident, gives it the role **Arrestee**, and does not display the **Add Field Arrest** icon  next to the name.

7. The *Edit Field Arrest* screen appears. Make any necessary changes to the Field Arrest record.

   For more information on editing a Field Arrest, refer to "Edit Field Arrest" on page 370.

8. If applicable, click **Complete** and **Submit for Review** if the review feature is turned on. You are then returned to the Field Arrest.

9. Click **Go Back** on the Field Arrest to return to the Incident.

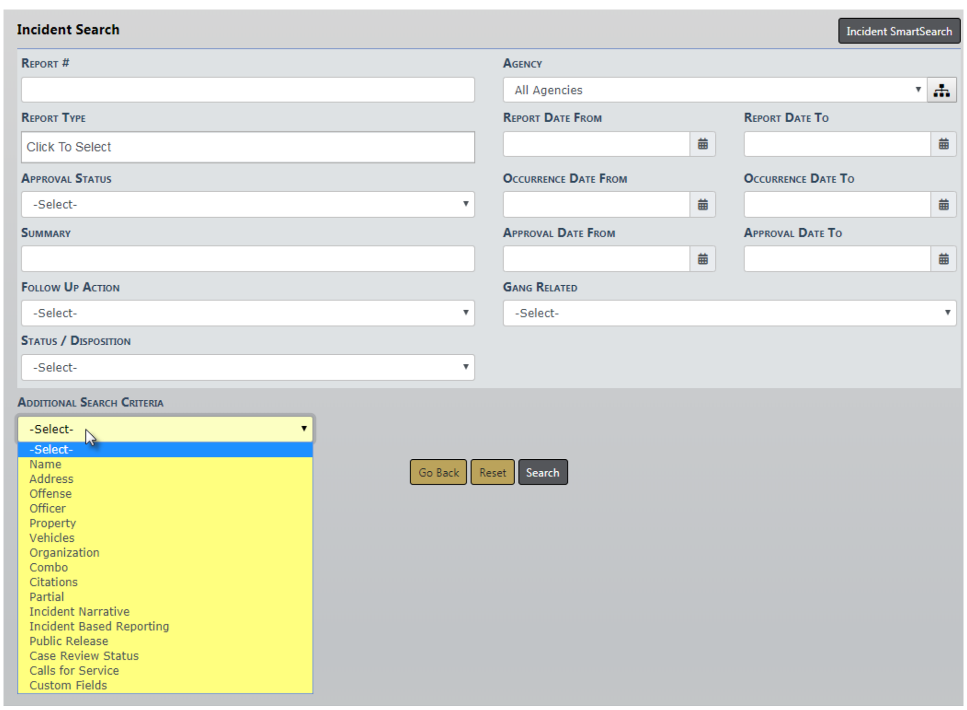
10. Click on the **Names** tab of the Incident.

Note: The Names tab is red, indicating arrestee details are needed. This process does not currently update the arrestee details for you; however, Incident validation still applies as with other incidents, indicating more information is needed.

11. Click the **edit icon** on the offender record to update the arrestee details to satisfy validation if needed.

Incident Search

The **Incident Search** window allows you to search for incidents by entering data in any field or combination of fields, including by NIBRS code. When entering the report number you can use the % sign as a wildcard. For example, if you were looking for report number 2018D4210149, you could enter %10149 and the report would be located. Agency defaults to your agency, but with appropriate permissions, a different agency in your workgroup can be selected. Select the *Additional Search Criteria* for more search options.

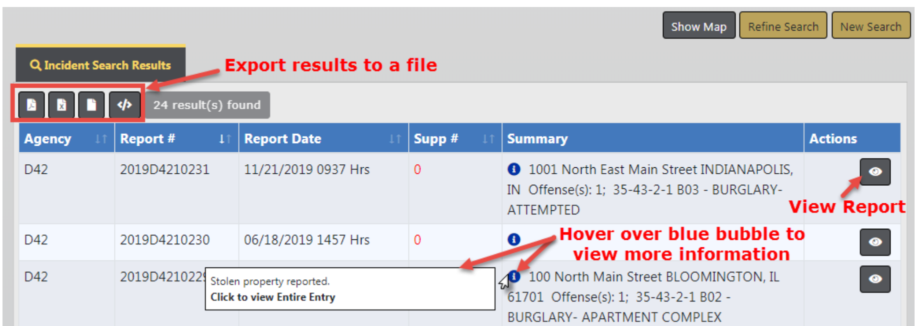


Note: You can include **Use of Force** in your search criteria by first selecting **Name** or **Combo** under *Additional Search Criteria*.

Select **Combo** as the *Additional Search Criteria* to enter criteria for vehicle, officer, property, offenses, modus operandi, address, and person. When you select Combo, additional search fields appear where you can enter search criteria for the aforementioned areas.

You can search for incidents across all agencies within the user's state by clicking on the **Incident SmartSearch** button on the top right of the screen. For more information on **SmartSearch** refer to "SmartSearch" on page 271.

If you type in a specific report number, the system takes you directly to the report. If you click the **Search** button without entering any search criteria, a message appears in red at the top of the screen instructing you to specify at least one field when performing a search. Regardless of which method you use to query the system, except for specific report number, you will receive a list with reports matching your search criteria.



At the top of the *Incident Search Results* window there is a **Show Map** feature that plots the listed reports with GEO Verified addresses using **Google Maps**. The **Export Results** allow you to export the list to a PDF document which can be printed, export to an Excel document, export to a Comma Spaced Values (CSV) file, or to an Extensible Markup Language (XML) file.

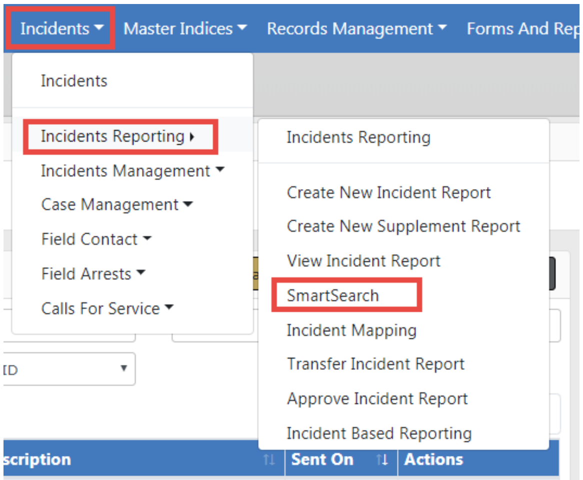
Click on the view icon  to view the Incident Report. The *Summary* tab opens by default. If the report has more than one Supplement, the number of Supplements are listed next to the  icon.

SmartSearch

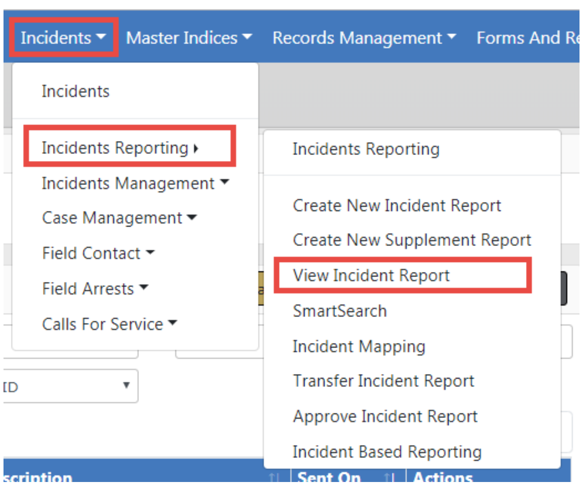
Users can, with appropriate permissions, search for incidents across all agencies in the Online RMS system within the user's State, outside of the State if configured by your agency, or both. You can also limit your search using date range filters. This search adds a simple interface to perform searches the way one would in an Internet search engine, such as Google.

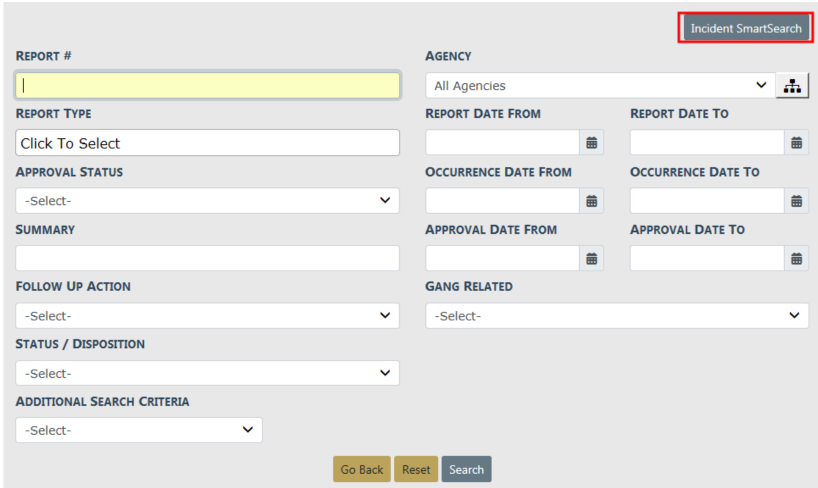
You can access **SmartSearch** two ways:

- Click the *Incidents* menu on the top navigation bar, click *Incidents Reporting*, then click the *SmartSearch* option.

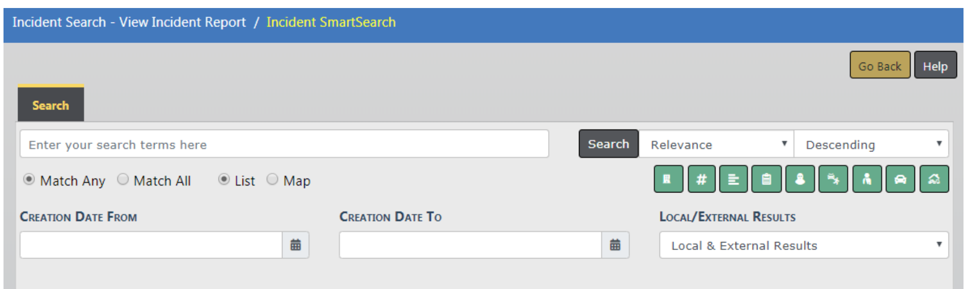


- Or click *the Incidents* menu on the top navigation bar, click *View Incident Report*, then click the **Incident SmartSearch** button on the Incident Search screen.





Either option opens the *Incident SmartSearch* screen.



Enter a word or phrase into the search box on the upper left, then click the **Search** button. The results display based on how well they match the entered text.

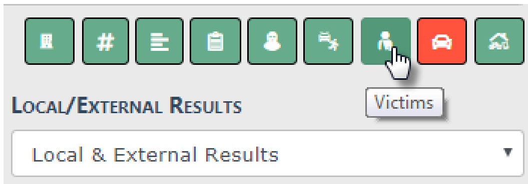
> **Note**: The **SmartSearch** only searches on Approved incident reports. Incident reports with other statuses can be searched using the standard View Incidents option in the Incidents menu.

The default sorting option is *Relevance*, which means **SmartSearch** sorts the returning documents based on how well they match the entered text. There are other sorting options available in the *Sort By* area.

To ensure that each document contains every search word specified, check the *Match All* option. This forces the search to return documents which only contain all of the words or phrases entered in the search bar.

Review the search results in a *List* format, or on a *Map*.

The green icons on the right side of the page indicate what areas of the incident report are being searched. Hover your mouse over an icon to view what it represents. Click on each icon to disable or enable an area. Disabling will cause **SmartSearch** to exclude that area from the search; red icon excludes and green includes.

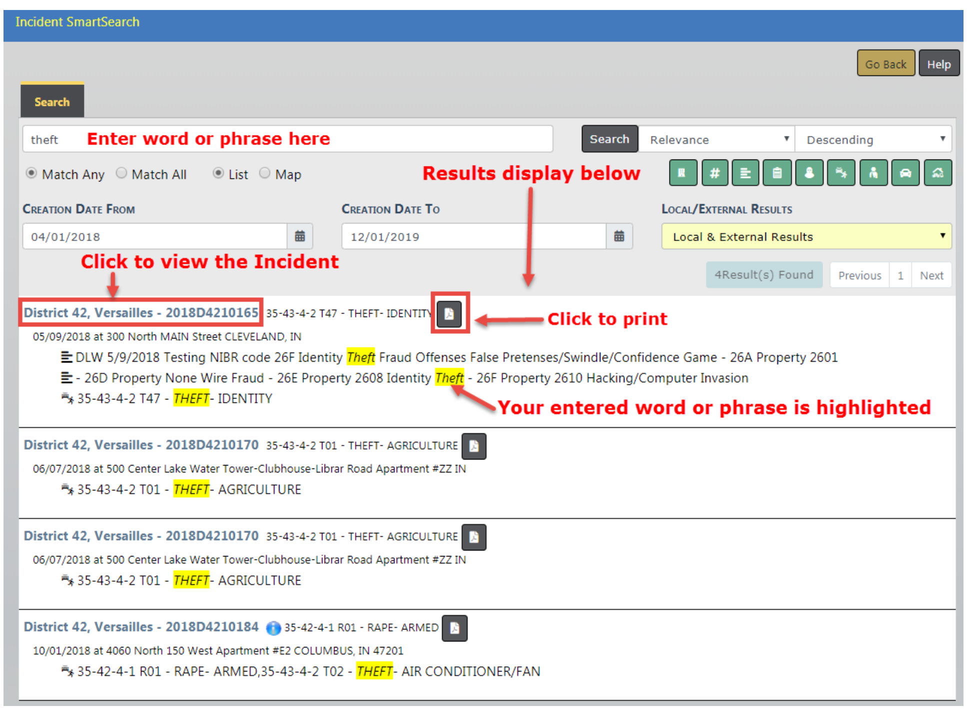


Optionally, enter a date range to filter your search results for specific date ranges.

You can filter by *Local Results Only*, *External Results Only*, or *Local & External Results* if configured by your agency.

If you chose to display the results in a *List*, the results highlight the text matching your query. If any *Offenders* in the matched reports have mug shots, these also display. You can view the report by clicking on the **Incident Report #** link at the top of each result. This opens a new tab, letting you view the report details without actually leaving the search page. To return to the search page, click the Search tab.

Click on the print icon to print a specific Incident Report that appears in the results list.



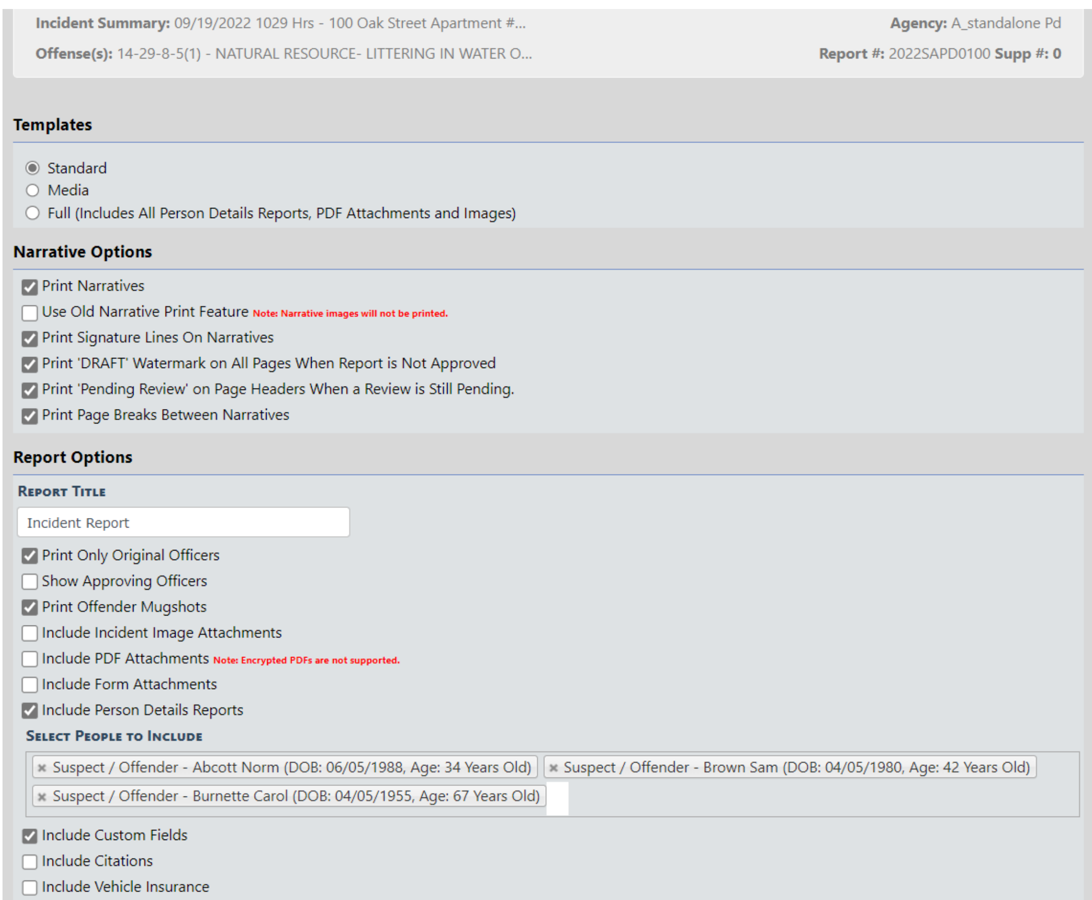
Printing Options

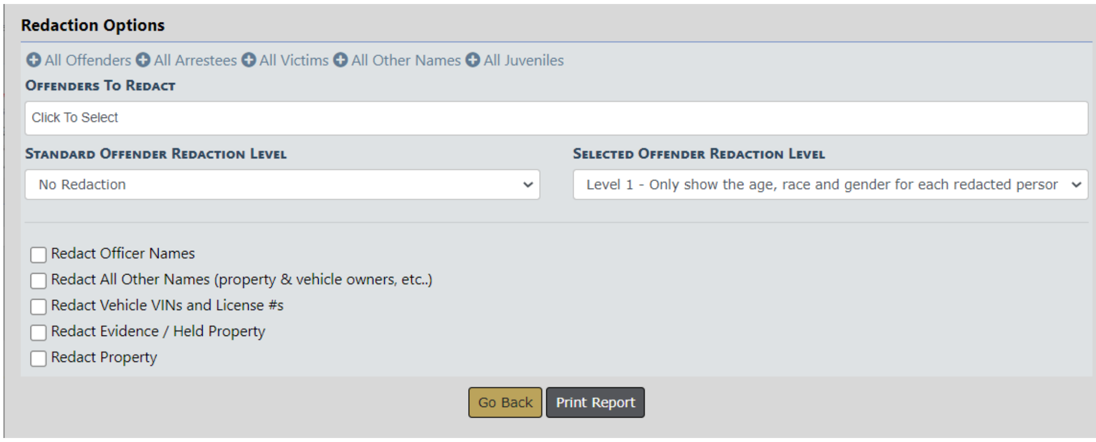
When viewing the **Incident Report** you may choose to **print selected incidents** by selecting the applicable check boxes.

The **Print** button takes you to a full menu of print options. The top of the window has available print templates for easy selection.

- *Standard*-prints the main areas of the report and associated people. The checked areas can be edited to further customize your print.
- *Media*- selects the most common public information areas to include and appropriate redaction options. The checked areas can be edited to further customize your print. Please refer to your agency's policy on Public Information.
- *Full*- selects all areas of the report including attachments, forms and person details. The checked areas can be edited to further customize your print.

Note: Only Known master people can be printed.





Choose a **Template** and select the options you wish to include and/or redact on the report.

Click the **Print Report** button.

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

Note: If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

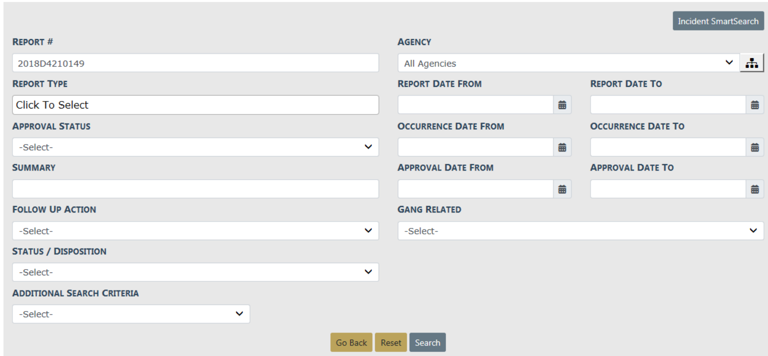
Changing Incident Status

With proper authority you can change the status of an *Approved Report* to either *Initial* or *Disapproved* from the **Incident Status** screen. Every change to the **Incident Status** is tracked in the *Status History*.

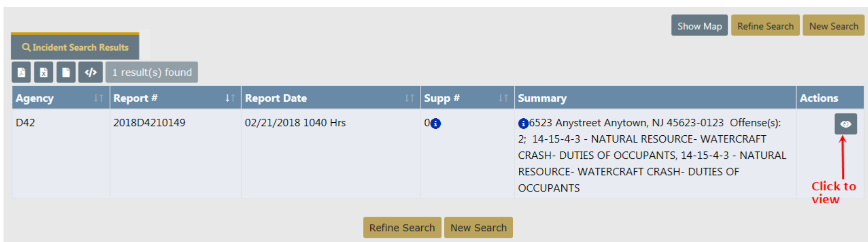
You can access the **Incident Status** screen from the *View Incident Report* screen, or from the *Incident Report* menu.

From View Incident Report

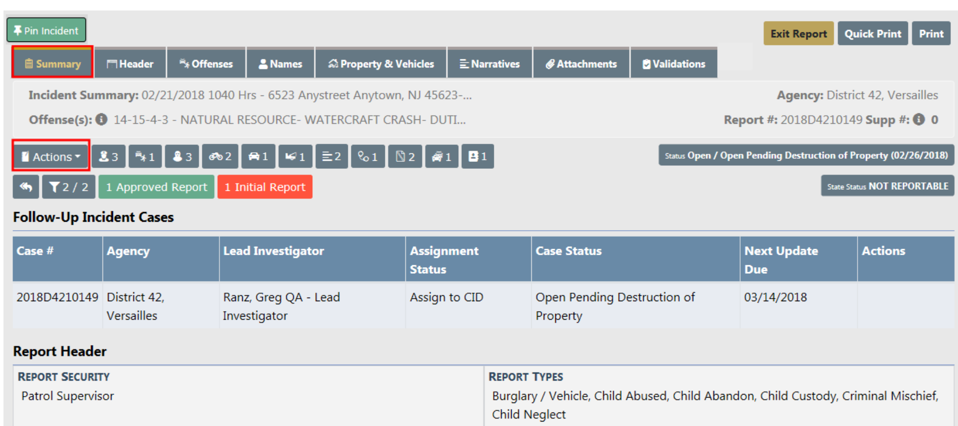
Click on the *Incidents* menu on the top navigation bar, select the *Incidents Reporting* submenu, then select *View Incident Report* to display the Incident Search screen. For more information using this method, refer to "View Incident Reports" on page 265.

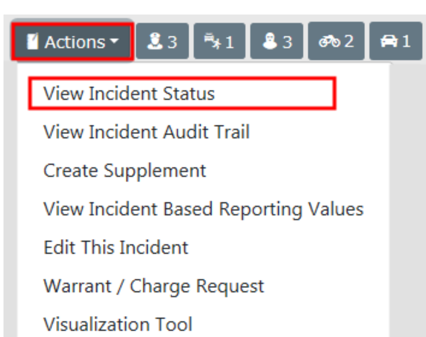


On the *Incident Search Results* screen, click the view icon  to view the incident.

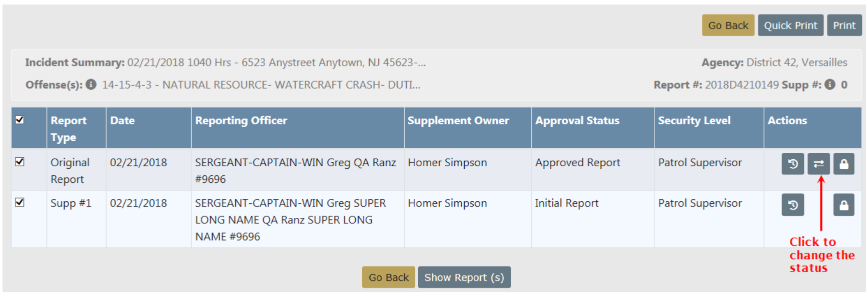


Click the **Actions** button on the *Summary* tab of the Incident Report, then select **View Incident Status**.

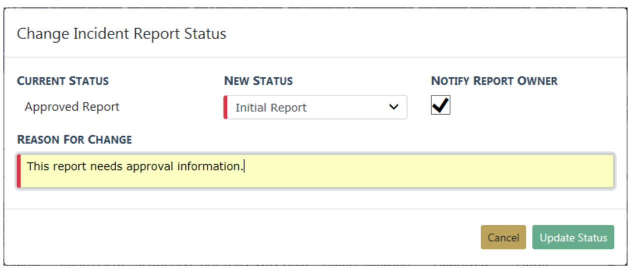




Click on the select icon on the right of the appropriate Incident to open the **Incident Status** record, then click on the change status icon to open the *Change Incident Report Status* screen.

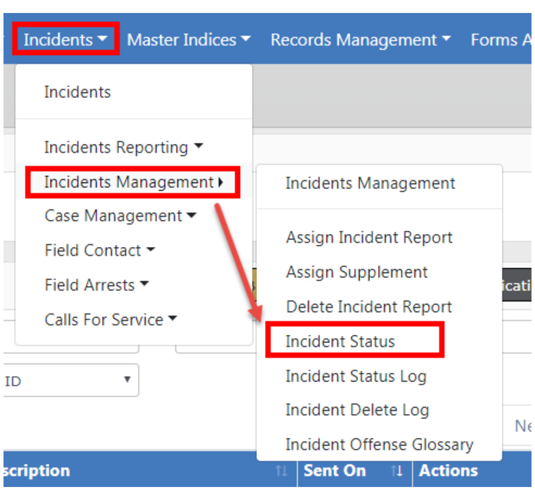


On the *Change Incident Report Status* screen, click **New Status** and select a status from the drop-down list, enter the **Reason For Change**, select whether or not to **Notify Report Owner**, then click the **Update Status** button.

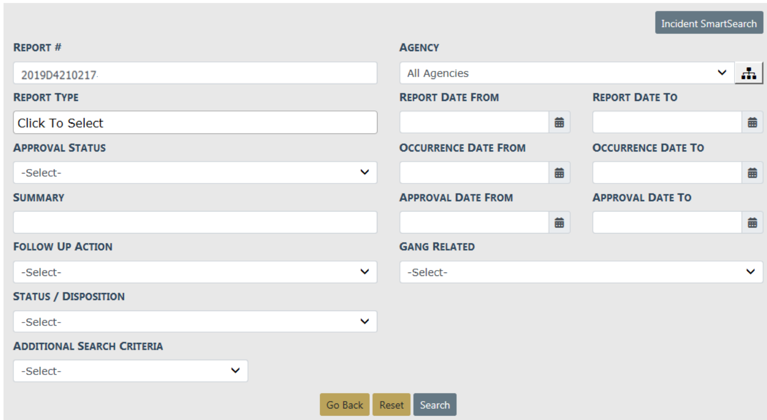


From the Incident Management Menu

Click on the *Incidents* menu on the top navigation bar, select the *Incidents Management* sub-menu, then select *Incident Status* to display the Incident Search screen.



Enter the search criteria then click the **Search** button to display the Search Results.



Click on the select icon on the right of the appropriate Incident to open the **Incident Status** record.

Disapprove

To disapprove, either click on the disapprove icon to disapprove and add comments.

Or click on the revert to initial status icon to choose a **New Status** of *Disapproved Report*, enter the **Reason For Change** and select whether or not to **Notify Report Owner**.

Change back to Initial Report

Click on the revert to initial status icon .

On the *Change Incident Report Status* screen, click **New Status** and select *Initial Report* from the drop-down list.

Enter the **Reason For Change**.

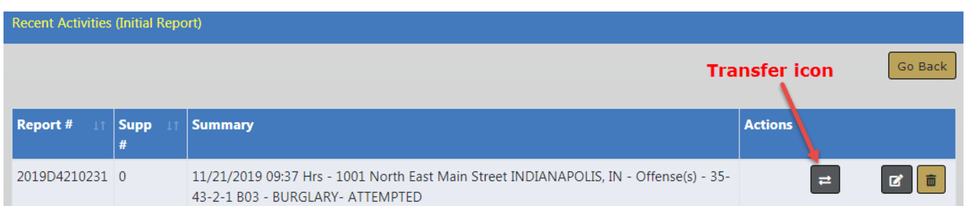
Select whether or not to **Notify Report Owner**.

Click the **Update Status** button.

Transfer Incident Report

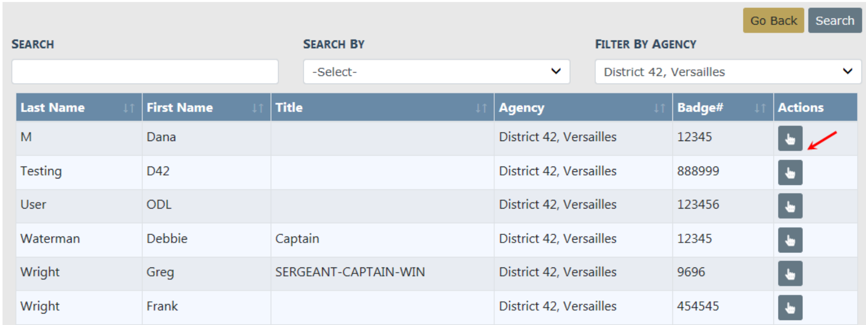
You have the ability to **Transfer Incidents** (Initial and Supplements) to other officers or to *Records*. You must *own* the report and it must be in *Initial* or *Disapproved* status. This can be done from the **Recent Activities** menu, or by searching for reports using the **Transfer Incident Report** section in the **Incidents** menu.

My Recent Activities

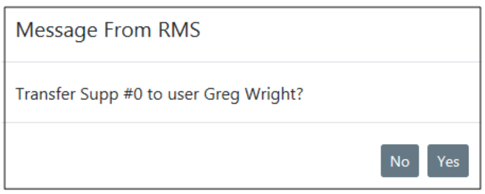


Select the **Transfer** icon to open a window with the transfer options.

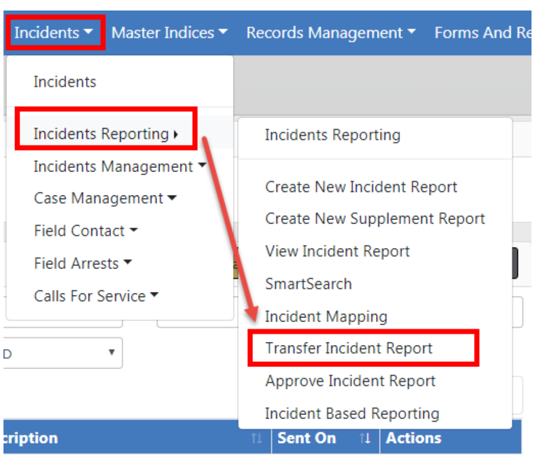
Select **Officers** or **Records** then click the **Transfer** button. If **Officers** is chosen, then select the appropriate officer by clicking the **Hand** icon.



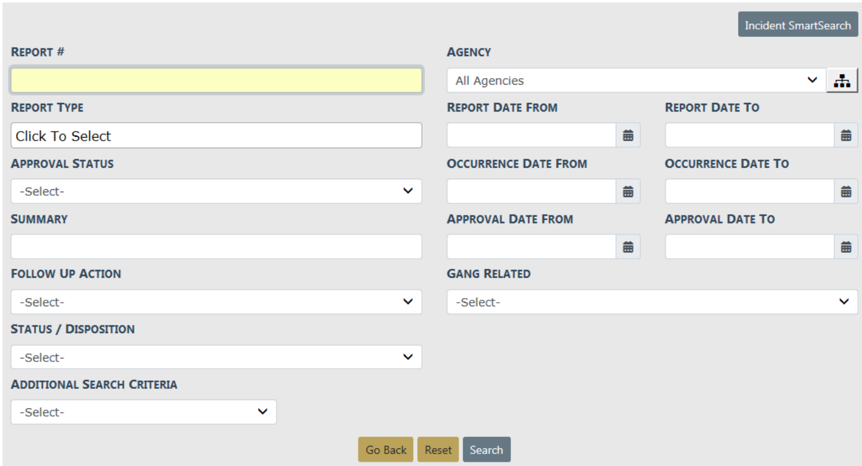
Select **Yes** to confirm the transfer, or select **No** to return to the *Select User* page.

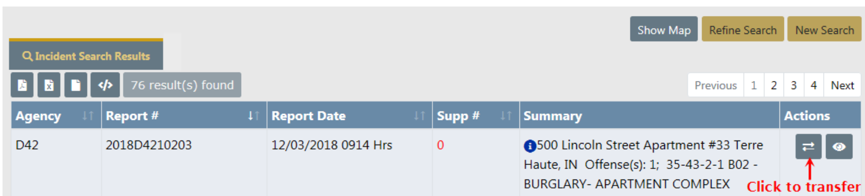


Incidents Menu



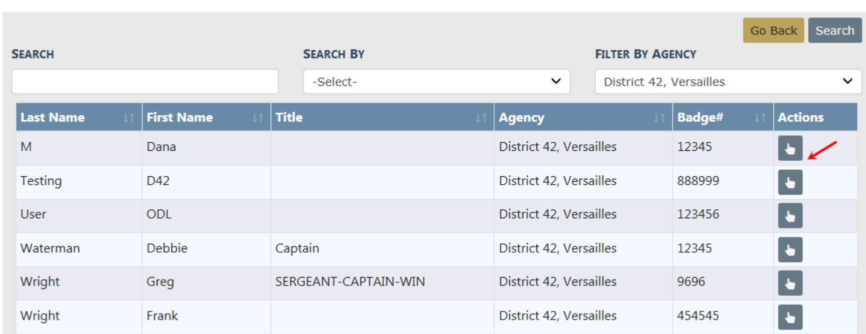
Enter the search criteria then click the **Search** button to return the search results, then select the **Transfer** icon to open a window with the transfer options..



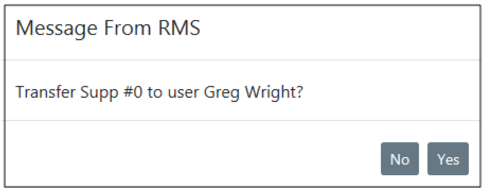


Select either **Officers** or **Records** in the *Transfer Options* window then click the **Transfer** button.

If **Officers** is chosen, then select the appropriate officer by clicking the **Hand** icon.



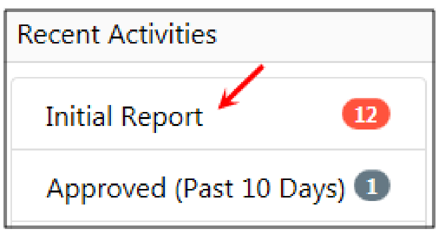
Select **Yes** to confirm the transfer, or select **No** to return to the *Select User* page.



Note: Once ownership has changed hands, only the new owner can edit it as if it were an *Initial Report* of their own.

Delete Initial Incident Report

A report that is initial status, and not submitted for approval, can be deleted by the owner of the report or by other users who have the delete authority. This can be done until you submit the report for approval. As the owner of a report, you can quickly access it from **Recent Activities** using the **Initial Report** link.



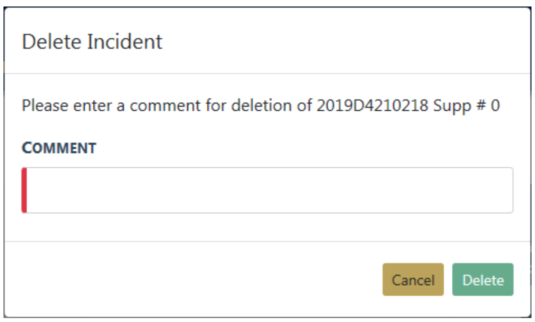
Note: Before proceeding further be aware that reports that are deleted are not recoverable from the database. A *Delete Log* is available, where a list of reports that have been deleted and by whom can be viewed.

Use the following procedure to delete one of your reports that is still in **Initial Status**.

1. If needed, click the *Home* tab in the upper left corner of the screen to open your *Home* page.

2. From the **Recent Activities** section, click on the number link to the right of **Initial Report** to open the **Recent Activities** window with a listing of your recent incident reports that are still in **Initial Status**.

3. Locate the report you want to delete and click the delete icon .



4. Type the reason for deletion in the **Comment** text box and click the **Delete** button to return to the **Recent Activities** window.

Add Attachments Outside Incident Workflow

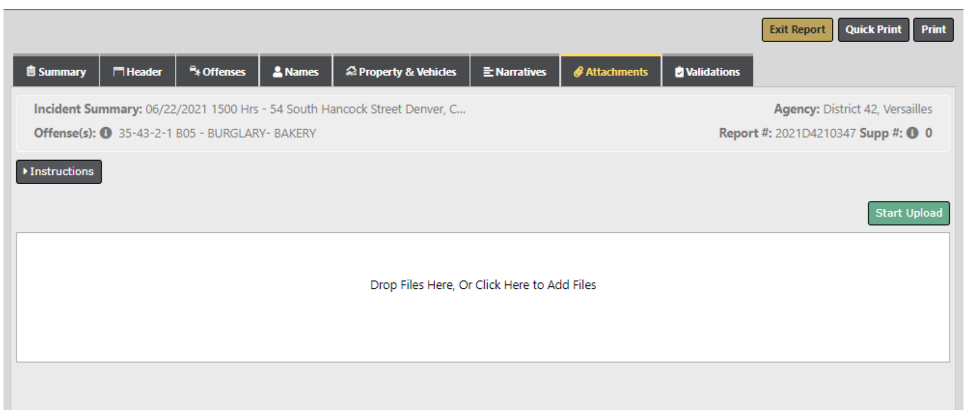
Authorized users can add attachments to an Incident Report outside the Incident workflow by searching for the incident.

Attachments that are added outside the workflow are set to supplement 0.

Note: The user's role must have the permission *Incident - Always Add Attachments to incident Regardless of Status* to perform this action.

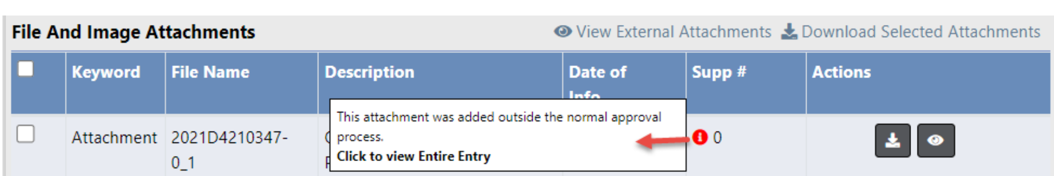
To add an attachment while on an Incident, select the **Actions** button, then **Add Attachments** menu option.

The *Attachments* tab opens where you can upload the attachment.



For details on uploading attachments, refer to "Add Attachments" on page 69.

After uploading, the attachment then displays in the grid with a red info bubble indicating the attachment was added outside the approval process. Hover over the info bubble to view the message.



Expunging Records

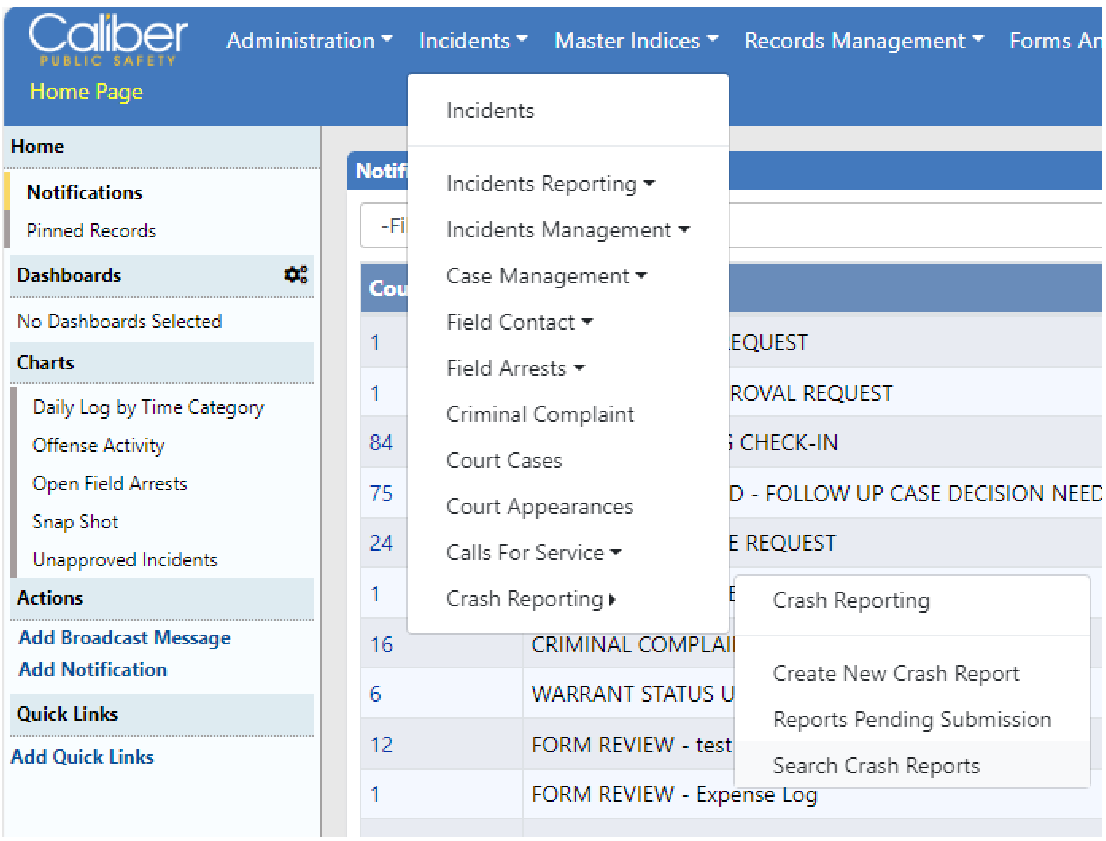
Refer to your agency’s policy on **Expunging Records**. When an agency is required to expunge a record, the specifics on what needs to be expunged are in the Court Order.

With proper permissions you can expunge an offender/arrestee from an Incident Report or expunge an entire Field Arrest. Expunged records will no longer be visible throughout Online RMS unless the user is granted permissions to view expunged details.

For detailed instructions on expunging records in Online RMS refer to "Expungements" on page 779.

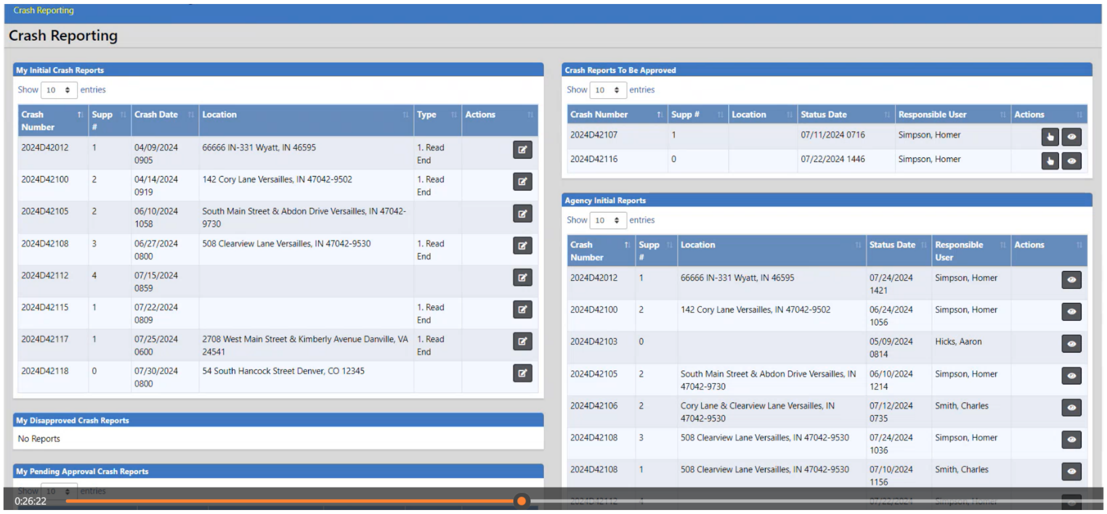
Crash Reporting

Crash Reporting can be accessed from the Incidents Menu. From the menu, the user may choose to view the Crash Reporting landing page, create a new crash report, view crash reports that have been submitted and are pending submission, and search entered crash reports.



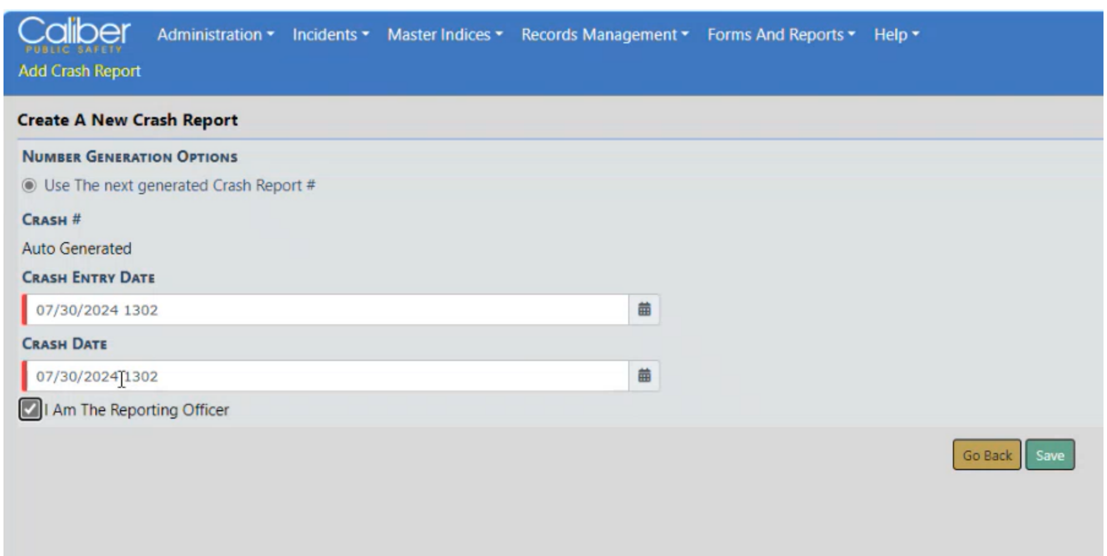
Crash Reporting Landing Page

From the Crash Reporting landing page, users may search existing crash reports, see initial crash reports and reports pending approval, and view approved/disapproved crash reports.

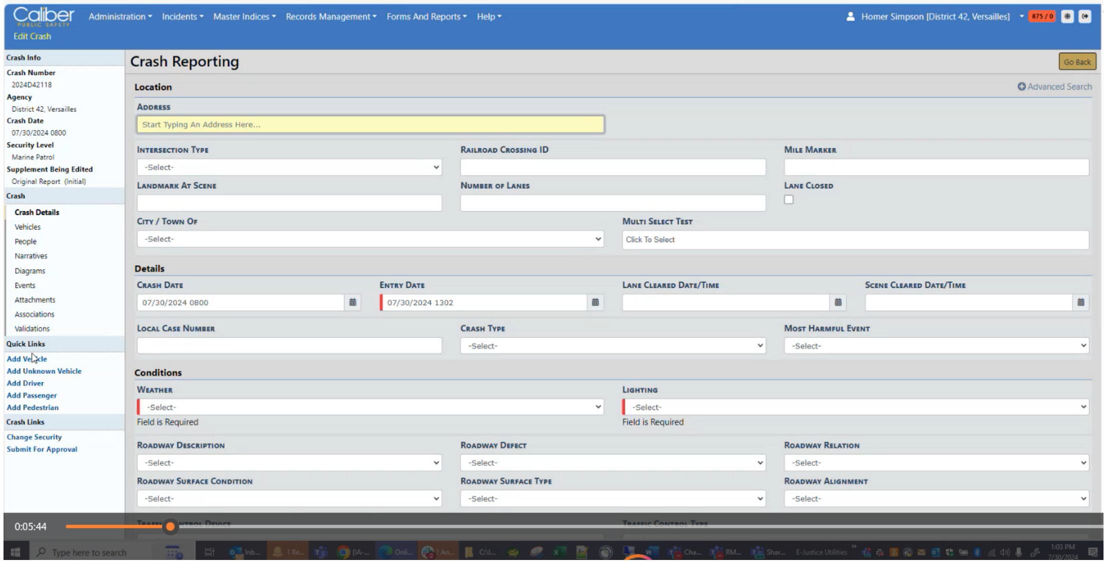


Crash Details

Entering a new crash report (or searching and then selecting from among existing crash reports) brings up the **Crash Details** screen. When entering a new crash report, enter the date of the entry and the date the crash actually occurred.

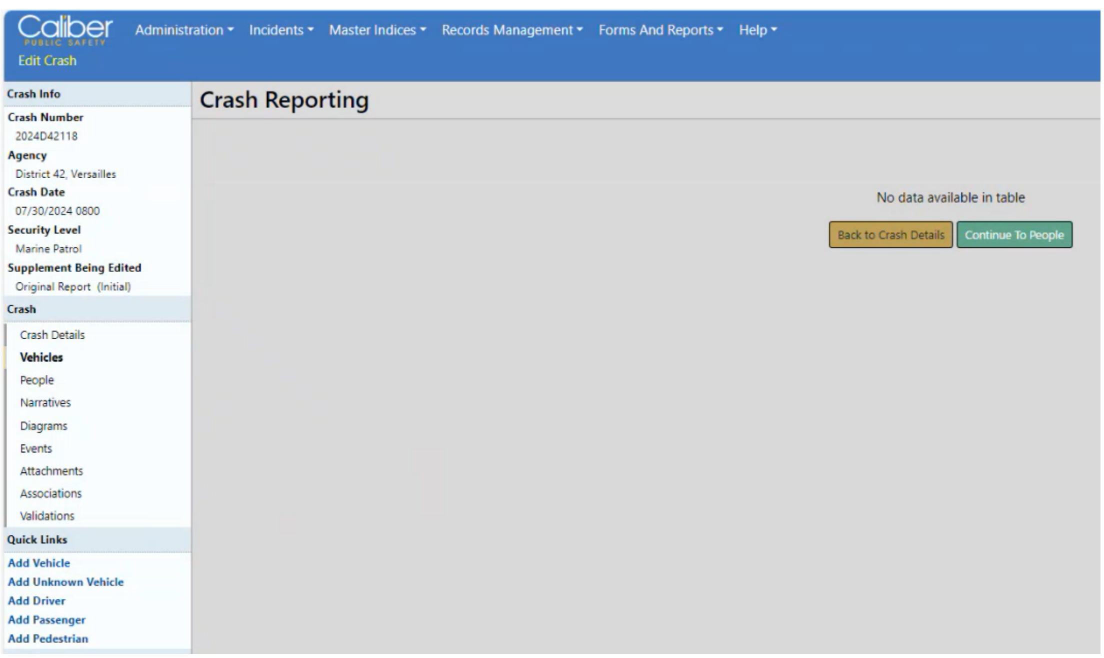


The **Crash Reporting** fields offer a variety of entry options and will guide the user through the needed and available information for the report. Enter all appropriate information (including required information flagged in red on the screen), then select **Save & Continue**.

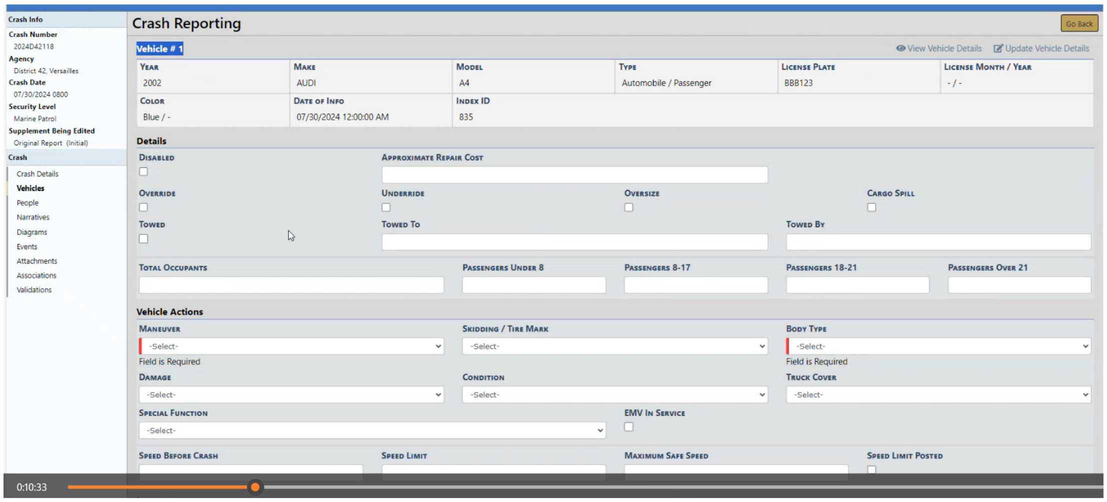


Vehicles

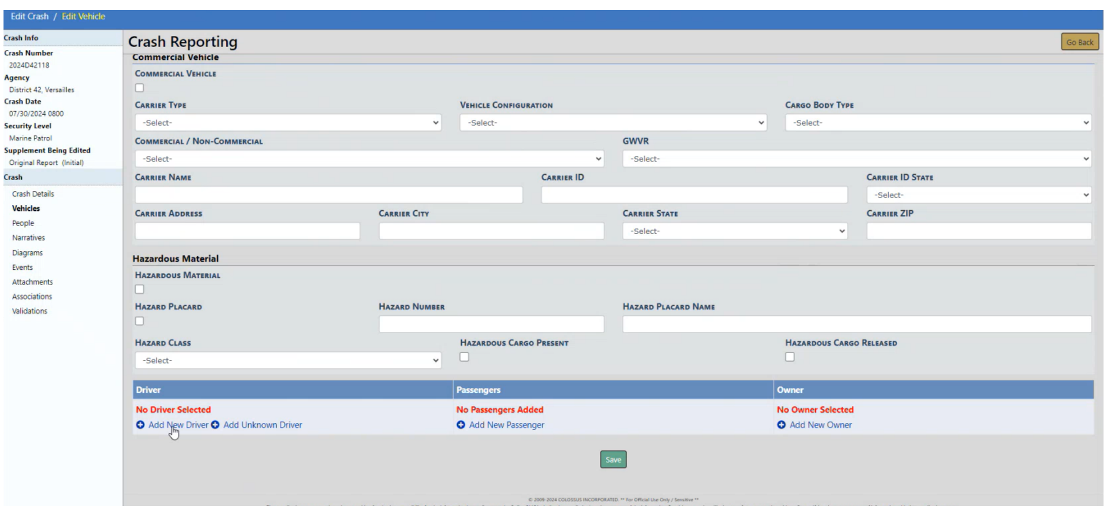
The Vehicles menu allows the user to enter vehicle information for the crash report.



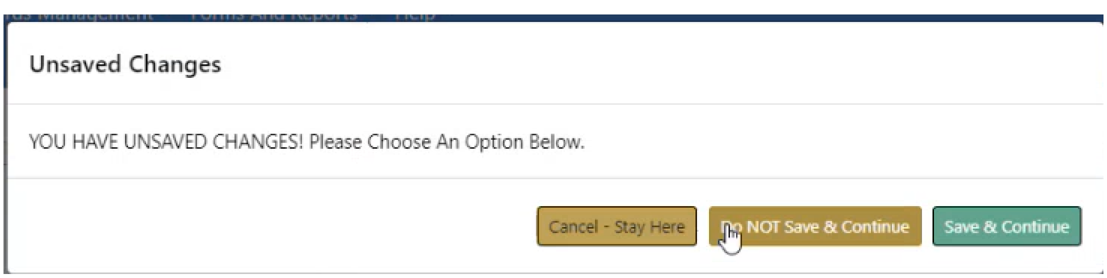
If there are no vehicles available from which to select, add vehicles as required. Vehicle 1 is typically the vehicle that caused the crash, but your agency may ahve specific or different requirements.



When entering information, you may enter drive and passenger information directly within the report. RMS Online will access the People Search as required when filling out these fields.

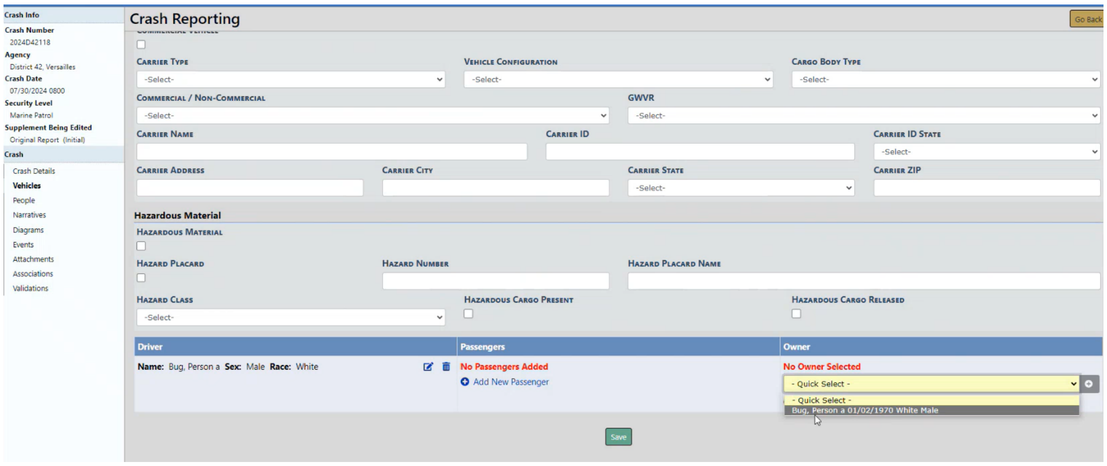


When moving from one section to another, you will be prompted to save any unsaved report entries.

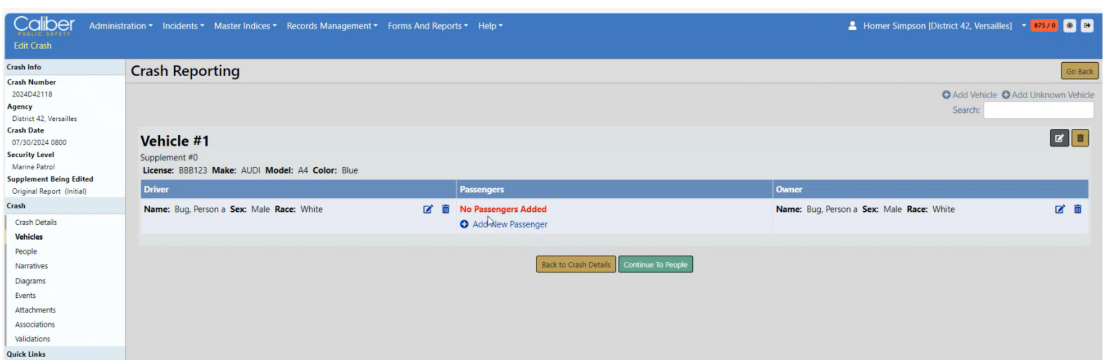


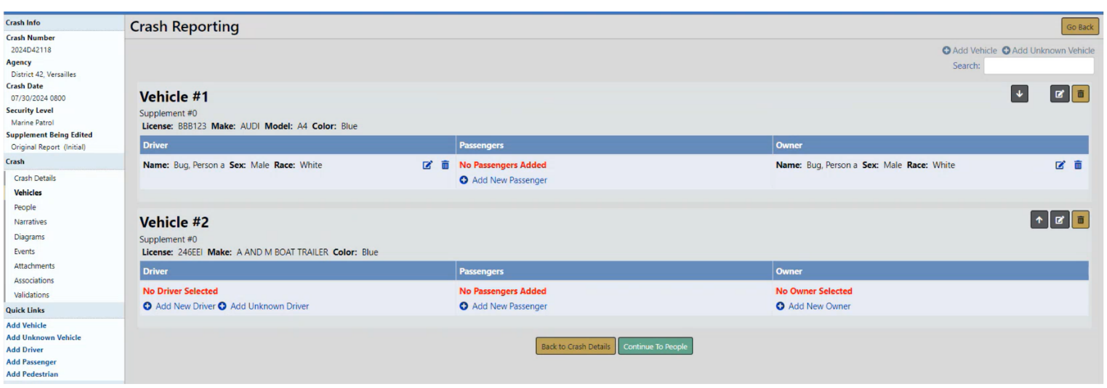
People

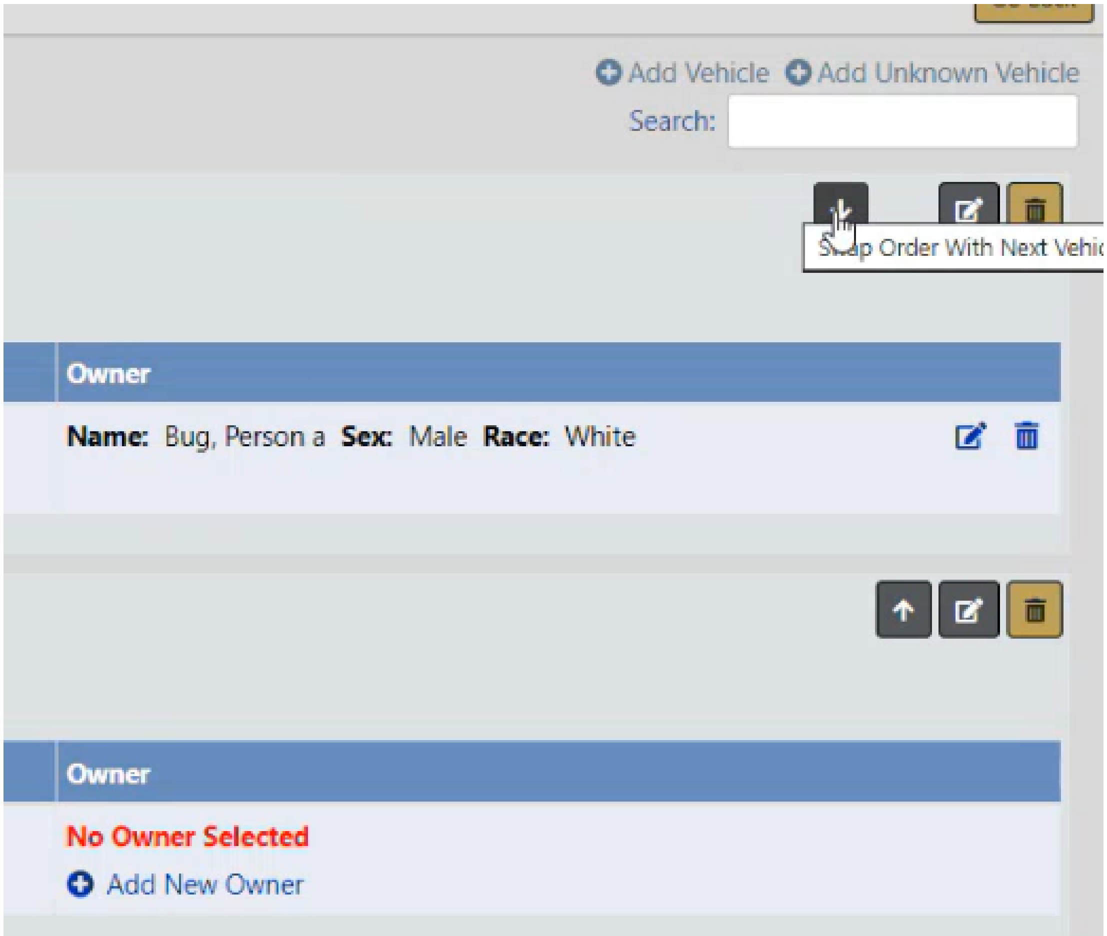
When drivers and passengers are known, they may be entered in the crash report.



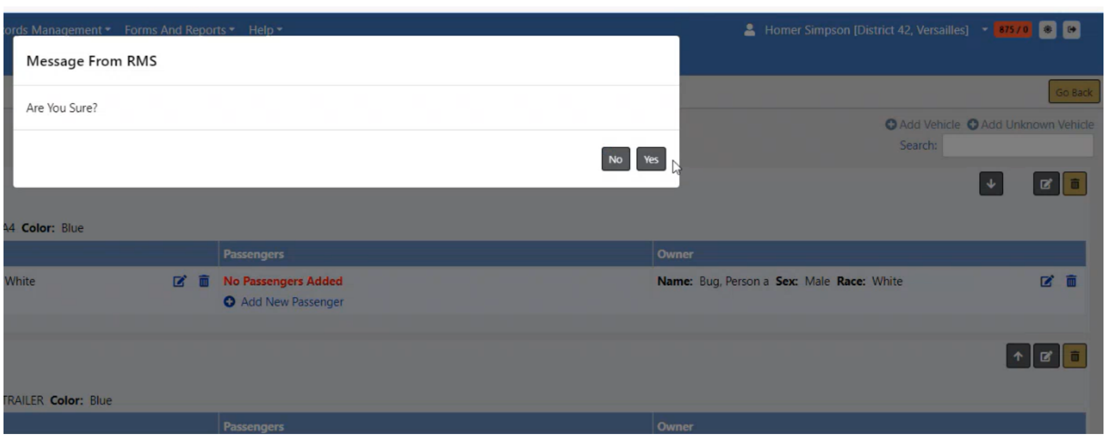
Unknown vehicles and unknown drivers for known vehicles may also be entered.

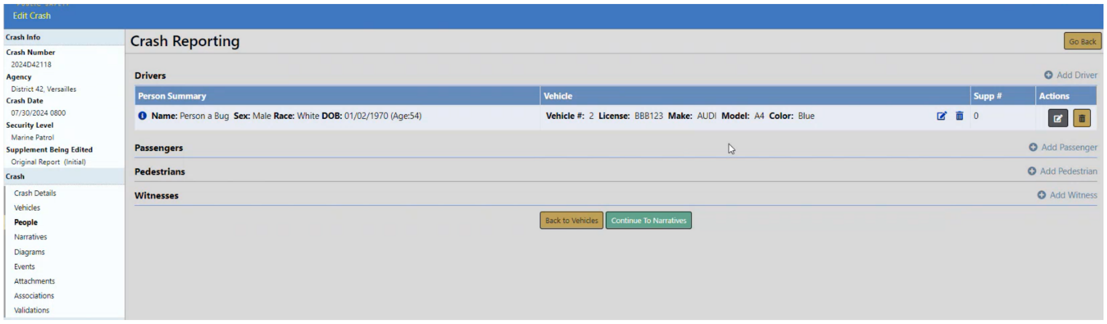




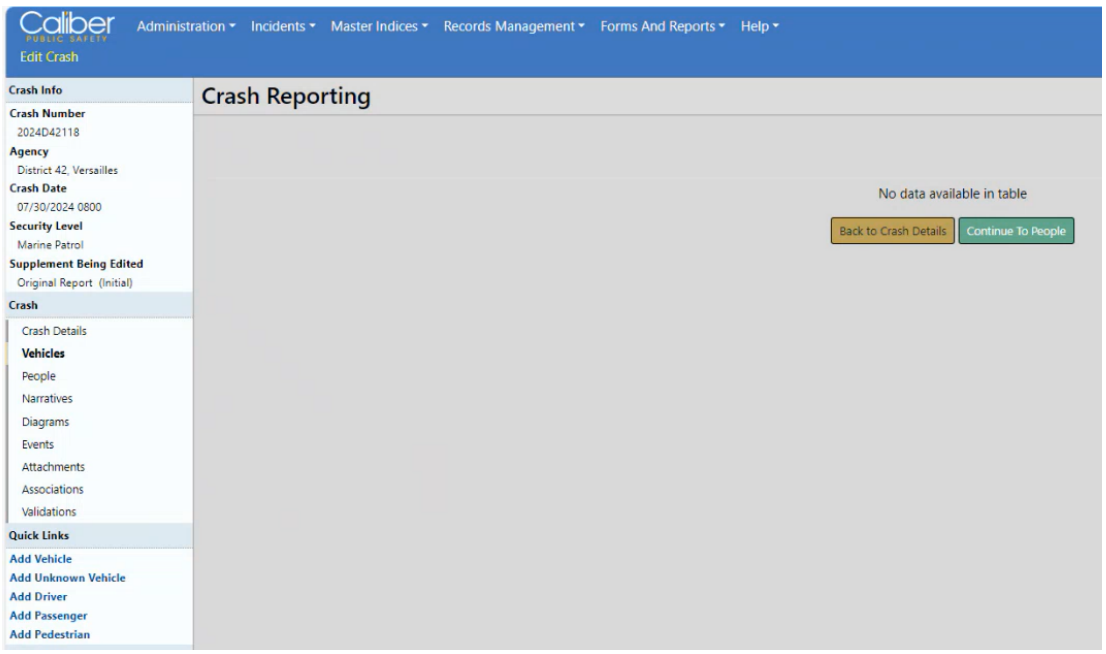


The system will prompt you to save, and verify field entries, as required.

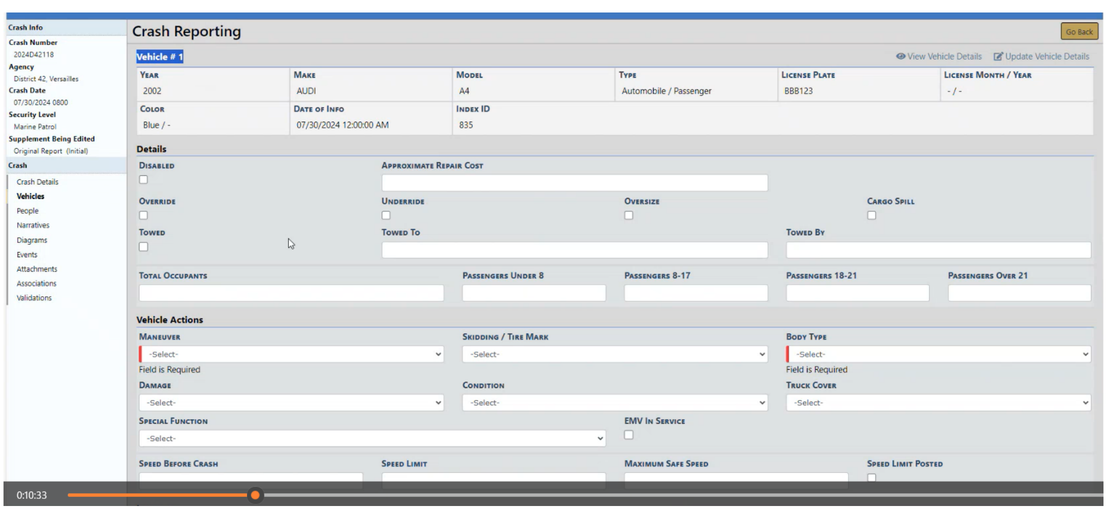




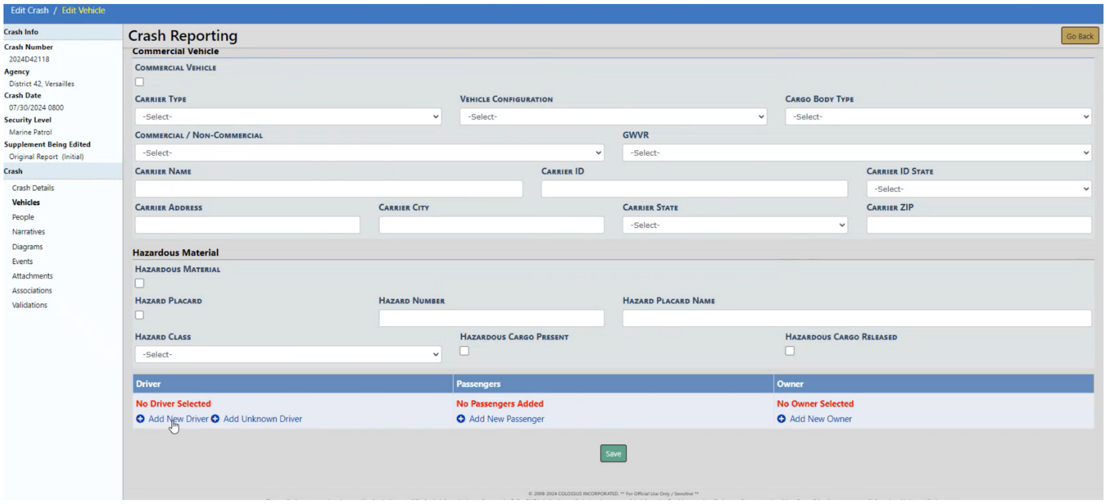
Edit Crash
Crash Info
Crash Number
2024D42118
Agency
District 42, Versailles
Crash Date
07/30/2024 0800
Security Level
Marine Patrol
Supplement Being Edited
Original Report (Initial)
Crash
Crash Details
Vehicles
People
Narratives
Diagrams
Events
Attachments
Associations
Validations
Crash Reporting
Go Back
Drivers
Add Driver
Person Summary
Vehicle
Supp #
Actions
Name: Person a Bug Sex: Male Race: White DOB: 01/02/1970 (Age:54)
Vehicle #: 2 License: BBB123 Make: AUDI Model: A4 Color: Blue
0
Passengers
Add Passenger
Pedestrians
Add Pedestrian
Witnesses
Add Witness
Back to Vehicles
Continue To Narratives



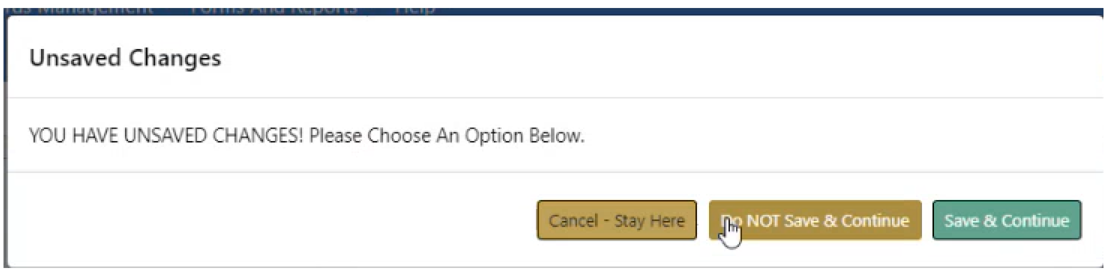
Caliber
PUBLIC SAFETY
Administration
Incidents
Master Indices
Records Management
Forms And Reports
Help
Edit Crash
Crash Info
Crash Number
2024D42118
Agency
District 42, Versailles
Crash Date
07/30/2024 0800
Security Level
Marine Patrol
Supplement Being Edited
Original Report (Initial)
Crash
Crash Details
Vehicles
People
Narratives
Diagrams
Events
Attachments
Associations
Validations
Quick Links
Add Vehicle
Add Unknown Vehicle
Add Driver
Add Passenger
Add Pedestrian
Crash Reporting
No data available in table
Back to Crash Details
Continue To People



Crash Info
Crash Number
2024D42118
Agency
District 42, Versailles
Crash Date
07/30/2024 0800
Security Level
Marine Patrol
Supplement Being Edited
Original Report (Initial)
Crash
Crash Details
Vehicles
People
Narratives
Diagrams
Events
Attachments
Associations
Validations
Crash Reporting
Go Back
Vehicle # 1
View Vehicle Details
Update Vehicle Details
Year
2002
Make
AUDI
Model
A4
Type
Automobile / Passenger
License Plate
BBB123
License Month / Year
- / -
Color
Blue / -
Date of Info
07/30/2024 12:00:00 AM
Index ID
835
Details
Disabled
Approximate Repair Cost
Override
Underride
Oversize
Cargo Spill
Towed
Towed To
Towed By
Total Occupants
Passengers Under 8
Passengers 8-17
Passengers 18-21
Passengers Over 21
Vehicle Actions
Maneuver
-Select-
Field is Required
Skidding / Tire Mark
-Select-
Body Type
-Select-
Field is Required
Damage
-Select-
Condition
-Select-
Truck Cover
-Select-
Special Function
-Select-
EMV In Service
Speed Before Crash
Speed Limit
Maximum Safe Speed
Speed Limit Posted
0:10:33



Remember, when prompted, you have the option to **Save & Continue** or NOT to save and continue.



Narratives

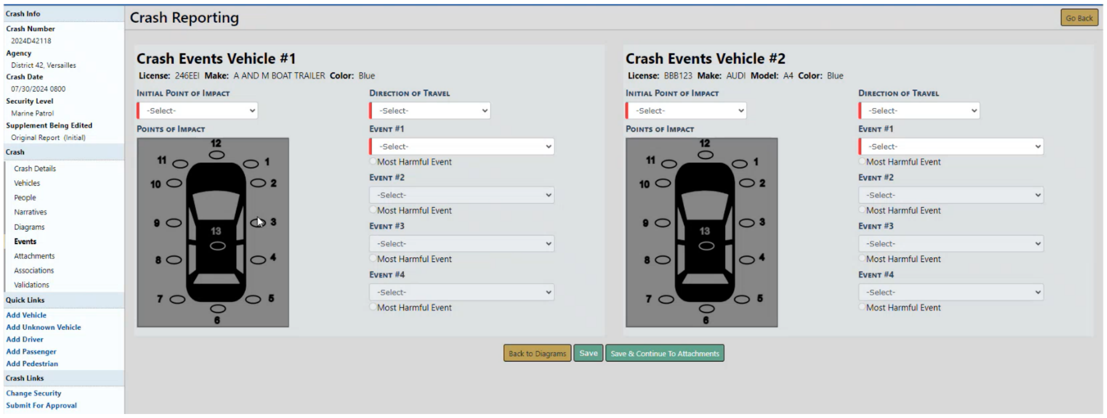
Narratives may be entered using the menu in the **Crash Reporting** section.

Diagrams

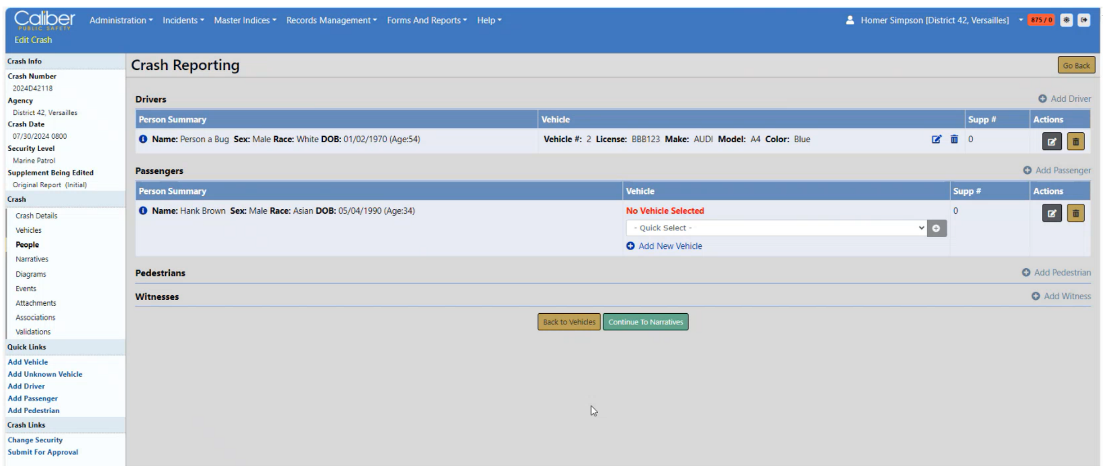
Diagrams may be added and edited in using the menu in the **Crash Reporting** section.

Events

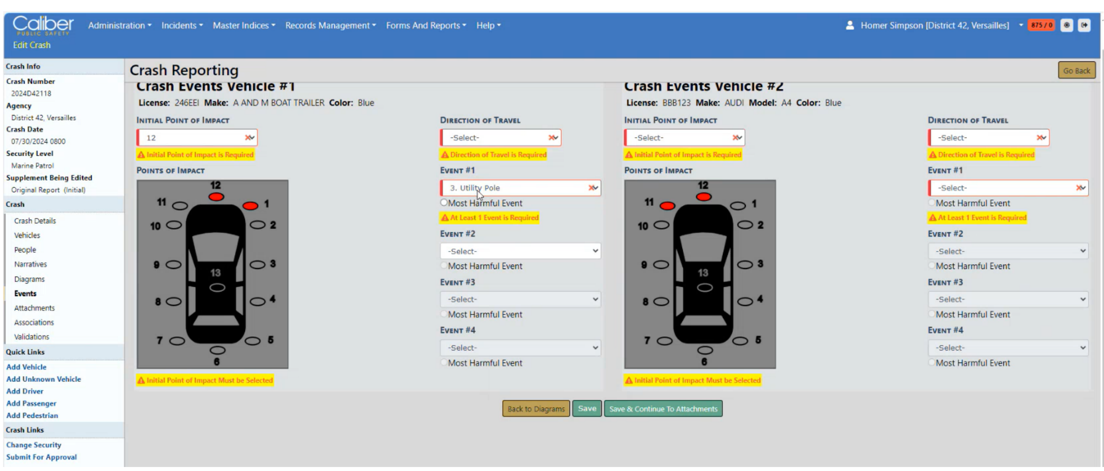
The **Events** menu allows you to enter specific information for vehicles involved in the crash.



Information not provided will be highlighted in red as applicable.

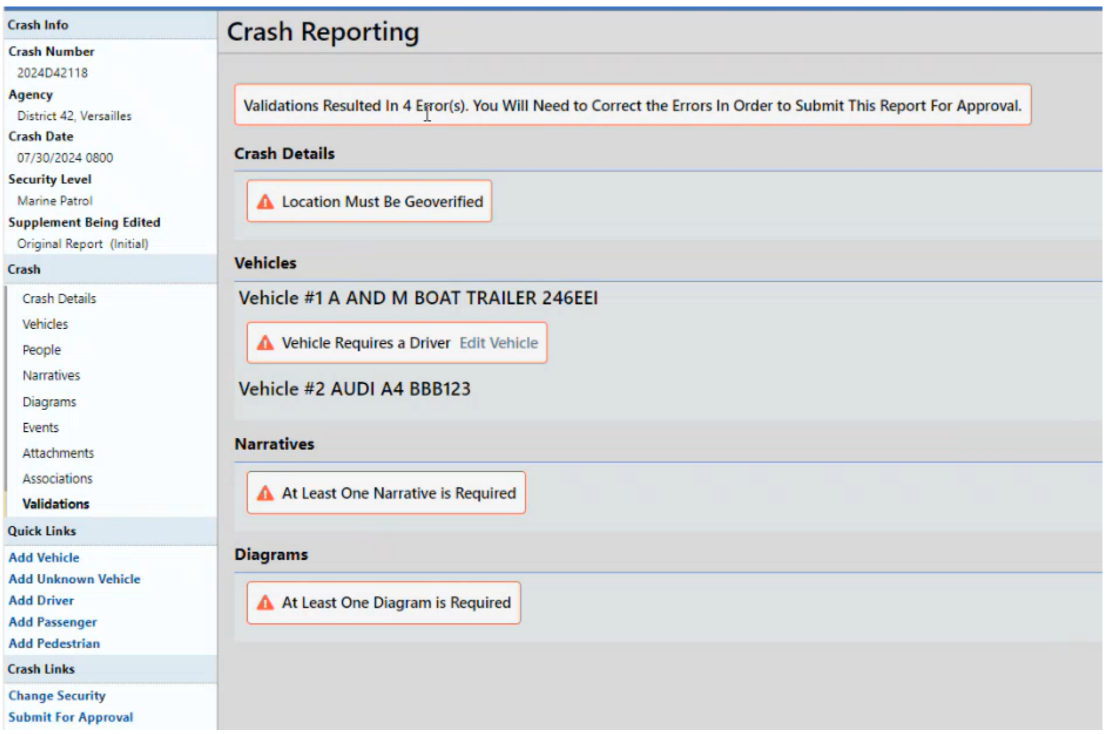


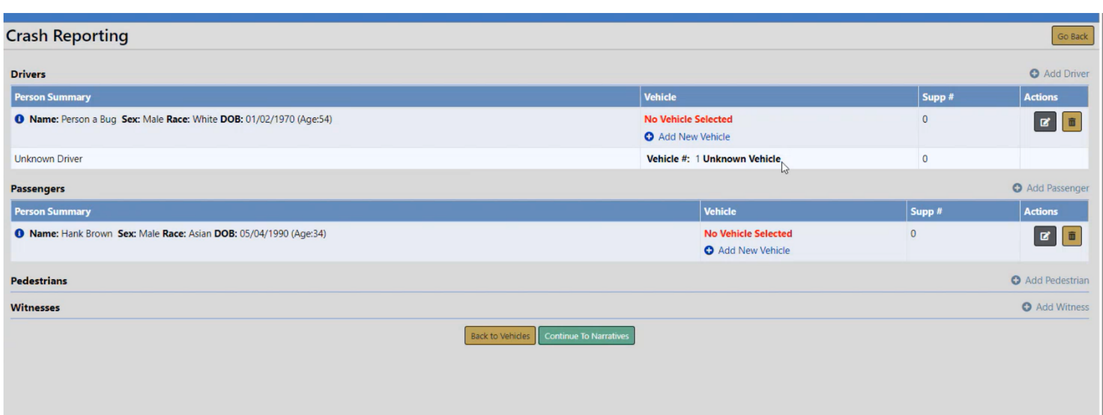
Required information for events entry will also be flagged on the entry screen.



Validations

When saving a crash report for submission, validations occur automatically. The system will prompt the user to provide information that is necessary for the crash report to be submitted. These can be viewed from the **Validations** menu at any time during the crash reporting process.





Select **Save & Continue** after entering applicable information.

Attachments

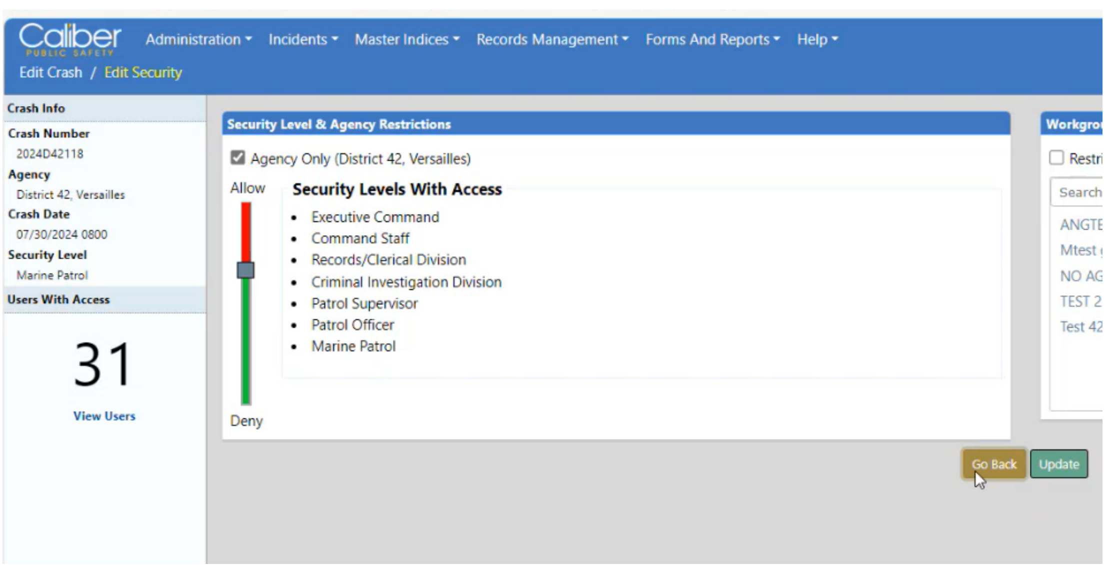
Attachments, including PDF files, can be added to a crash report from this menu.

Associations

Crash reports can be associated to incidents, etc. using this menu.

Security Level

Users with appropriate permissions may set the desired security level for the crash report. Security for Crash Reporting is maintained at the Crash level, not the level of individual supplements. **Any access restrictions applied to a crash report will apply to all supplements attached to that crash report.** (This differs from the way security is handled for Incidents, for example. Individual supplements attached to an Incident can have different security levels.)



For More Information

For more information on Crash Reporting, contact Caliber Public Safety.

Chapter 14. Supplement to Incident Reports

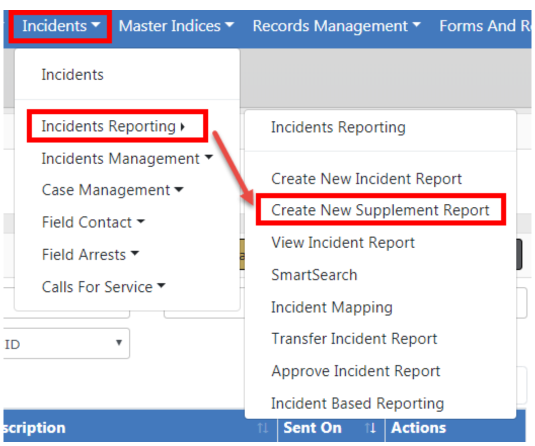
Create Supplements

Once an **Initial Report** is in the system, **Supplement Reports** can be created and attached to the **Initial Report**. The **Initial Report** is designated as *Supp# 0* and additional Supplements are then added in sequential order (e.g., *Supp. # 1*, *Supp. # 2*, etc.). Create **Supplements** to your own reports or to reports belonging to other users.

A **Supplement** can be entered to a report from your agency, even if the **Initial Report** is not yet completed; however, you cannot create a supplement to a report from another agency unless that **Initial Report** has been approved.

Supplements can be created using different methods:

- From the Incidents Menu.

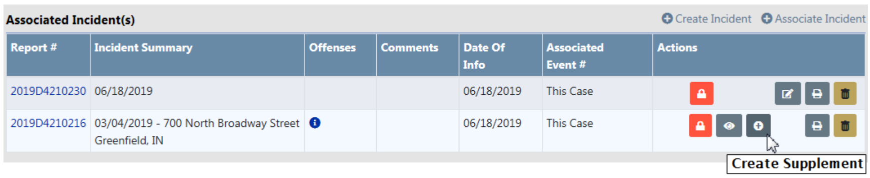


Search for the report by using the provided *Incident Search* screen. You must enter at least one search criteria. For more information on searching for incidents, refer to "View Incident Reports" on page 265.

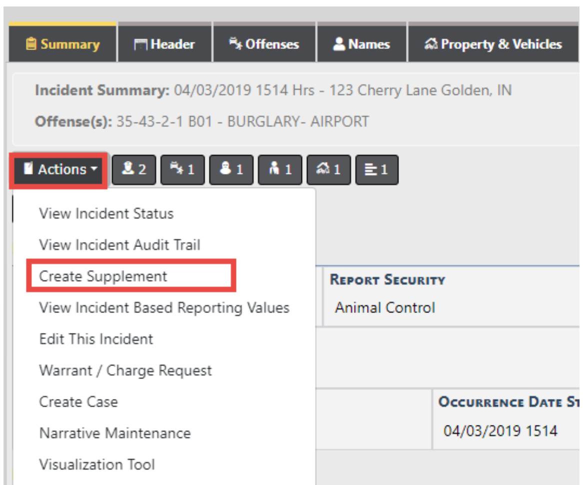
Select the appropriate incident from the search results.

- From an existing Case, to which an Incident is associated.

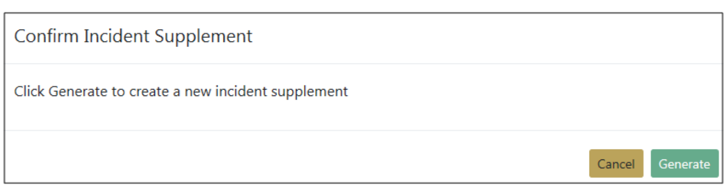
Access the Case, then page down to the *Associated Incident(s)* section. Click on the Create Supplement icon  on the appropriate Incident. For more information on Cases, refer to "Case Management" on page 455.



- From the *Actions* menu when viewing an incident report.



Whichever method you choose, a *Confirm Incident Supplement* window appears once you elect to create a Supplement:



Click **Generate** to continue with creating the **Supplement**.

There is no Incident Wizard when creating **Supplements** since there are only two minimum requirements which must be met before it can be submitted for approval.

- Reporting Officer for the Supplement
- Narrative

Although these are the two minimum requirements, a user is able to contribute any and all applicable information to a **Supplement** including *Attachments*.

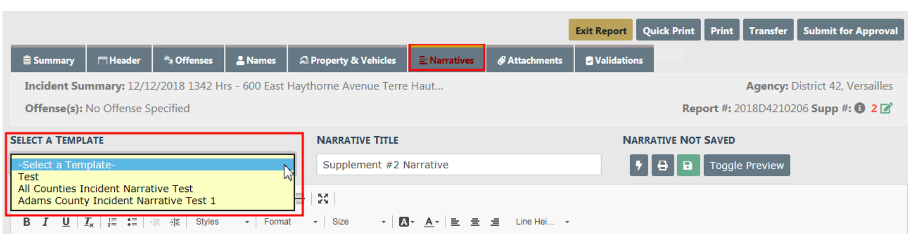
Note: The system adds you as a *Reporting Officer* automatically.

Supplement Rules

- The **Initial Report** is designated as *Supp# 0* and **Supplements** are then added in sequential order (e.g., *Supp. # 1*, *Supp. #2*, etc.).
- You can add a supplement that does not include NIBRS reporting data (i.e., add a narrative only) and submit for approval without satisfying any NIBRS validations that may exist from a previous supplement.
- You must be the owner of the *Supp* to edit it.
- Incidents can only be edited when in **Initial Status** or **Disapproved Status**.
- Incidents cannot be edited while in **Approved Status**.
- Incidents can only be deleted when in **Initial Status**.

Supplement Templates

Agency Templates can be used when creating the *Narrative* section of the **Supplement**. At the top of the built-in narrative creator, there is a drop-down box labeled **Select a Template** where you can choose a template.



Select a template from the list, complete the narrative, then click **Save.**

Chapter 15. Community Reporting

Community Reporting Overview

In response to COVID-19, Caliber Public Safety is offering a new product feature with Online RMS 11.3.2 to support **Community Reporting** of minor crimes, tips, and other police-related events. The **Community Reporting** feature leverages the power of Online RMS *Custom Forms* for your agency to embed a form in an existing website using only a couple of lines of HTML code.

With this enhancement, your agency can create their **Community Reporting** public forms using the *Custom Forms* module and making the forms available to the public via your agency's website.

Benefits of **Community Reporting**:

- Promote social distancing by reducing officer to public interactions for minor police reports.
- Better service your community by reducing non-essential contacts to ensure officers are available to provide help when emergencies arise.
- Keep officers on patrol and protect communities by offering an alternate method for the public to report minor police reports without the need to dispatch an officer.

Routing for available Custom Forms notifies Online RMS users when a new submission occurs. The same review process is used for both public and non-public forms.

There are two ways to take action on submitted forms:

- From a Notification.
- From your Recent Activities.

For more information on taking action, refer to “Taking Action on Submitted Forms” on page 304.

The same method is used for searching and viewing public and non-public Custom Forms. For more information, refer to “Search For and View Custom Forms” on page 65.

Note: For details on **Community Reporting** configuration, refer to the *Online RMS Admin Guide* or your agency administrator.

Taking Action on Submitted Forms

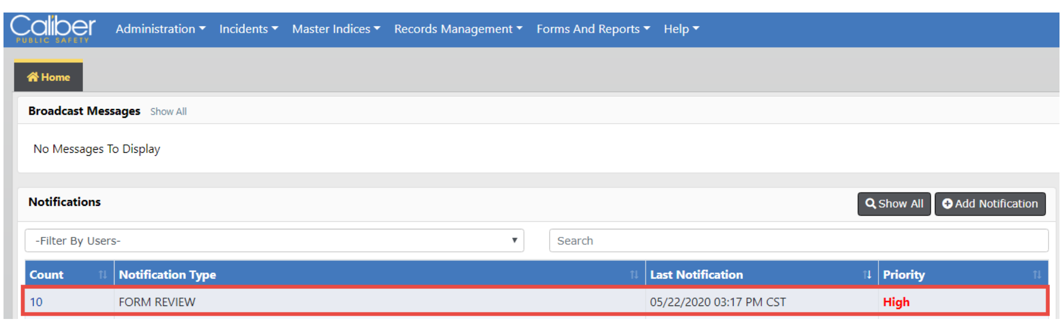
Routing for *Publicly or Non-Publicly Available Custom Forms* notifies Online RMS users when a new submission of a form occurs. Users designated by name or by role on the *Custom Form* configuration page, by your Online RMS agency administrator, receive a notification every time the public or non-public makes a new submission of a form. The process leverages the existing workflow and power of the Online RMS *Custom Forms* module. Taking action to review a *Custom Form* submission is the same for both public and non-public.

There are two ways to take action on submitted forms:

- “Taking Action via Notifications” on page 304.
- “Taking Action via Recent Activities” on page 312.

Taking Action via Notifications

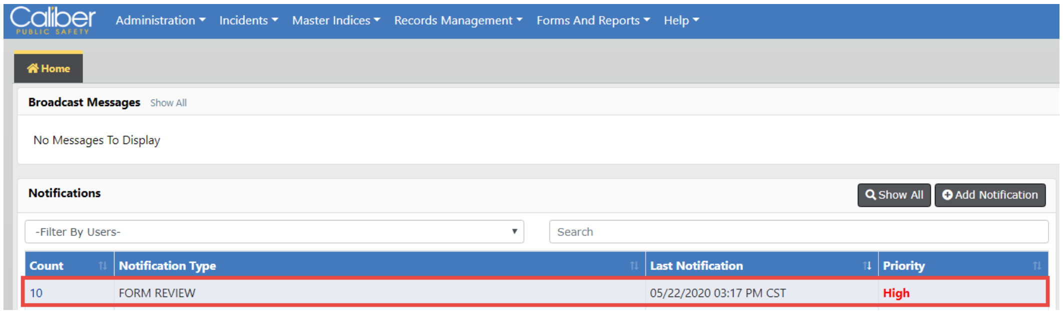
When a new public or non-public form is submitted, a notification appears on the **Online RMS Home Page** within your **Notifications** queue.



The **Notification Type** for form submissions is FORM REVIEW - *FORM NAME*.

Note: For more information on **Notifications**, refer to “Notifications” on page 25.

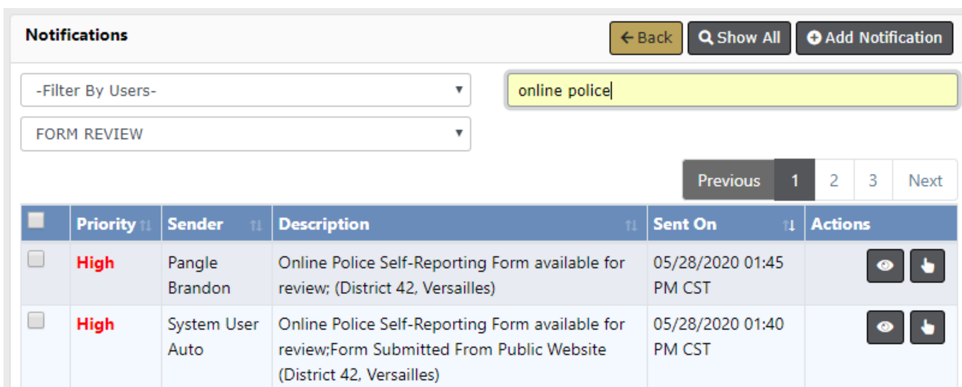
Follow these steps to review and take action.



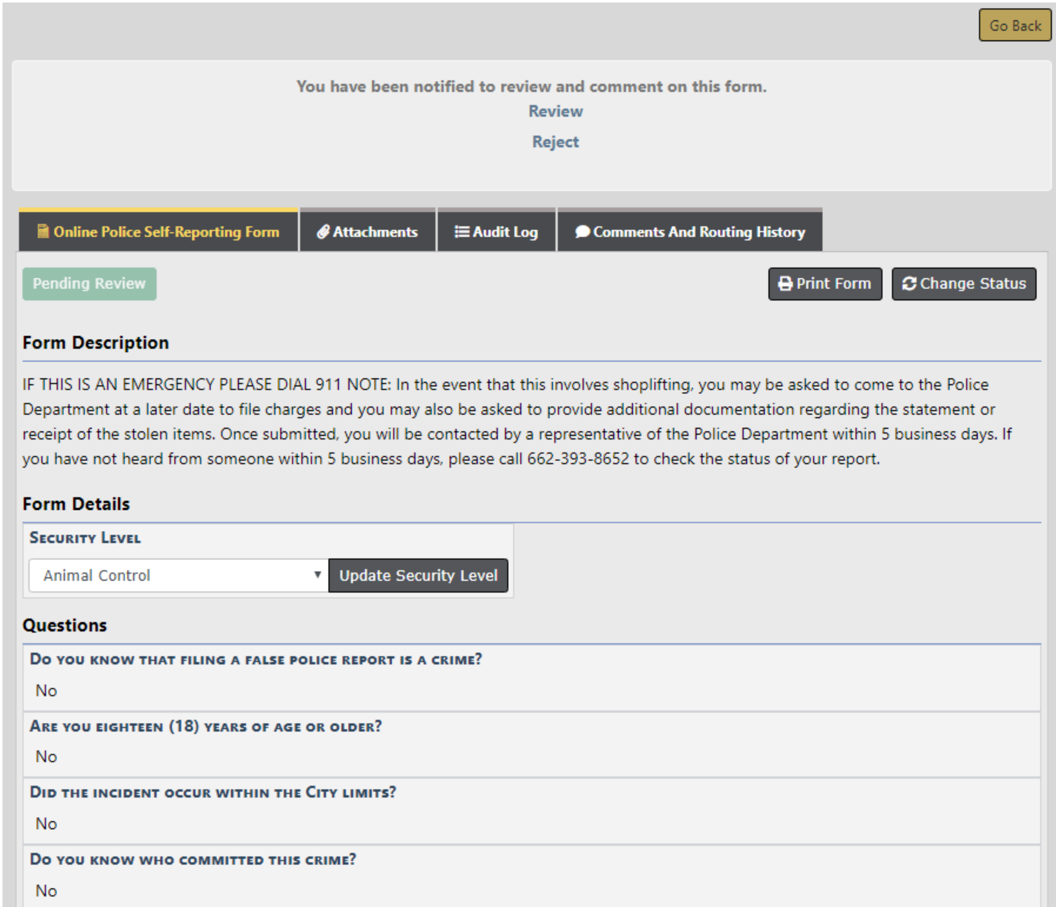
1. Click on the **Count** hyperlink.

   The Notification **Description** begins with the name of the *Custom Form*.

   - Use the **Search By** option to filter by **Description** if your agency uses more than one *Custom Form* configured with *Form Review Routing*.



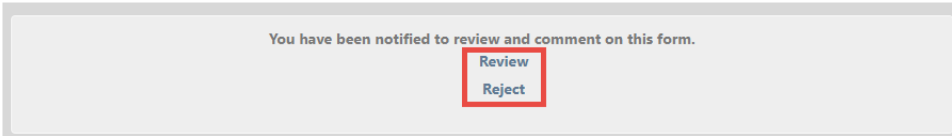
2. Click on the **Take Action** icon  to open the form.



There are four tabs.

- Tab 1 includes the **Information** as submitted by the public.
  - The form opens to this tab by default.
  - This tab is where you **Take Action**.
- Tab 2 includes **Images** submitted by the public or non-public.
  - Click on this tab to review images.
  - Presently, only one image can be uploaded with a public submission. *Allowing more images is planned for a future release.*
- Tab 3 maintains an **Audit** history of users access to the *Custom Form*.
- Tab 4 maintains **Comments** and **Routing History** of the submission and routing actions.

3. At the top section of Tab 1, **Reject** or **Review** (Accept) the form by choosing one of the options below.

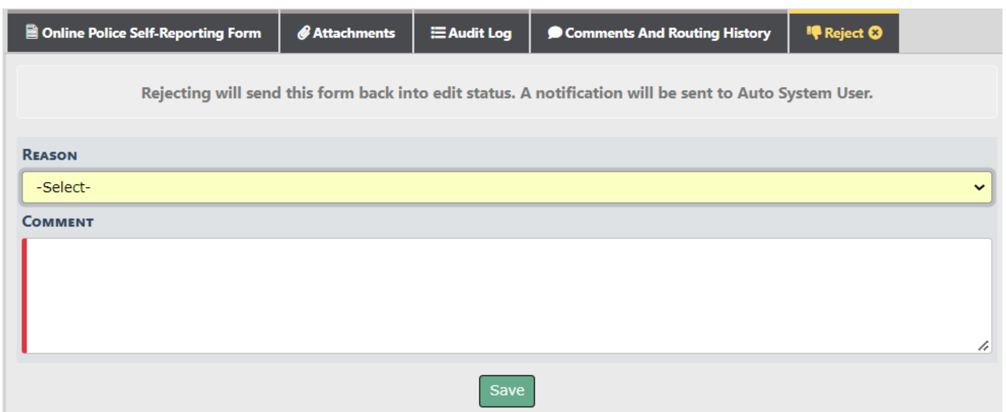


Reject

1. Click **Reject** to reject the submission.

   It is suggested that you use this option to track that the submission is not consistent with the purpose of the custom form (e.g. does not involve a crime or is an event for which the submission was **not** designed or your agency **does not** wish to track).

2. Select a **Reason** for the rejection and enter a **Comment**.



3. Click **Save**.

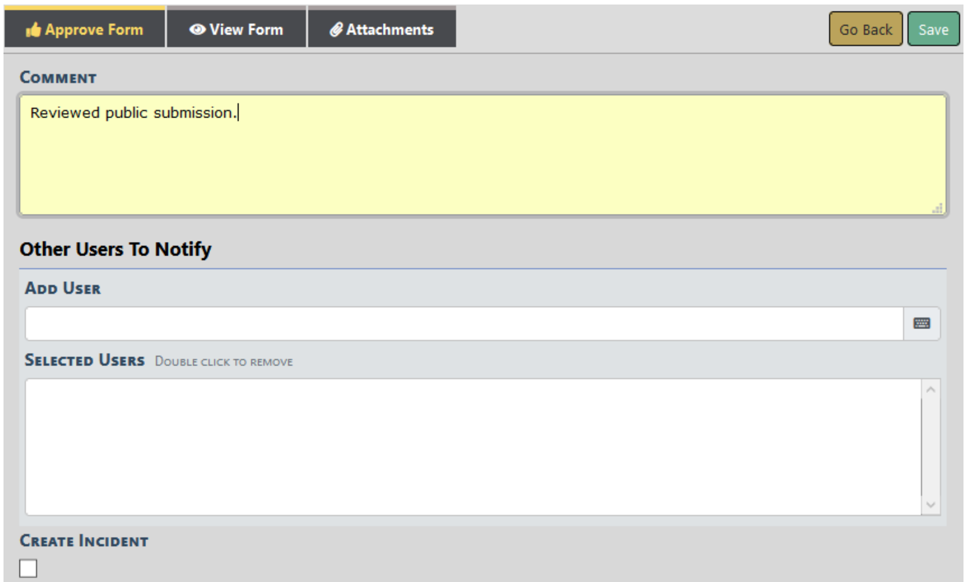
4. **Manually inform** the submitter by email or phone call.

   Note: Informing the submitter does not happen automatically; this is a manual process.

Review without a Police Report

Follow these steps when the submission involves an event that does not require a police report. You do, however, want to show the *Custom Form* was **Reviewed** and **Accepted** by your agency.

1. Click **Review**.

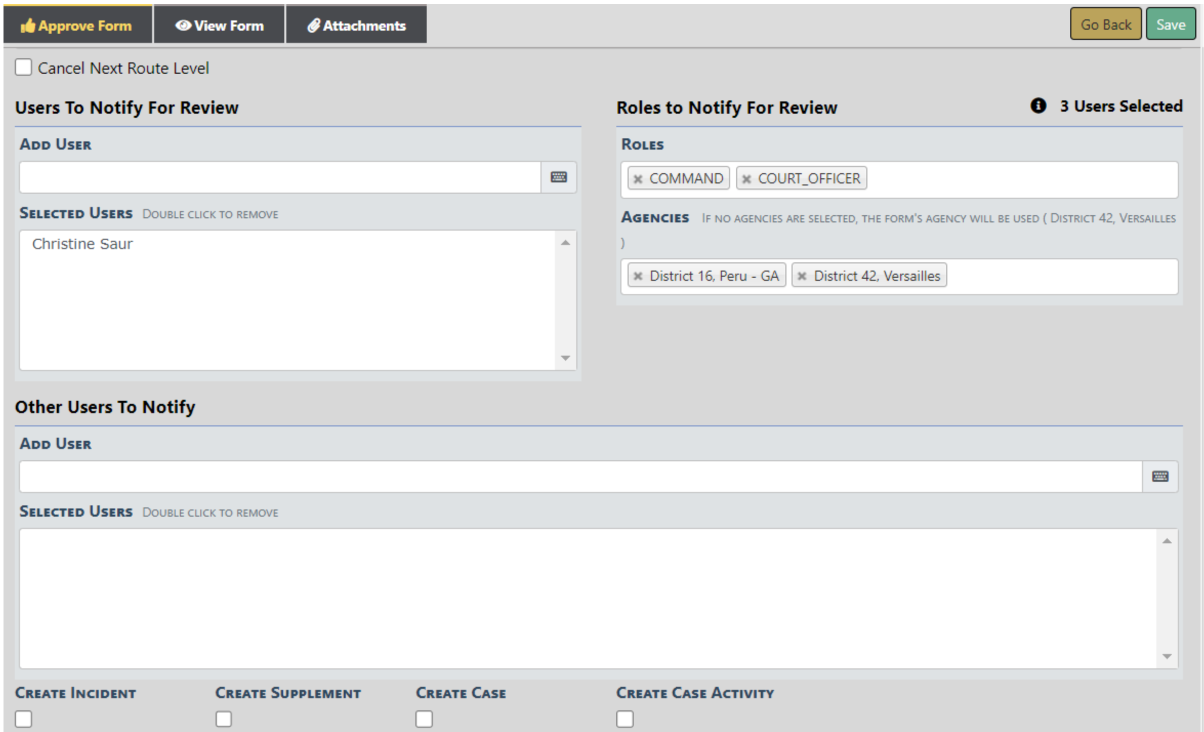


2. Enter a **Comment**.
3. **Add** other **Users** to notify others from review routes for awareness only.
4. Leave the **Create Incident** box *unchecked*.
5. Click **Save**.

Review and File a Police Report

Follow these steps when the submission involves a crime or event for which you need to **file an official police report**. Police reports can be associated during the review process, or after approval. In other words, if the form is already reviewed, you can still add associations if you have the appropriate user permissions.

1. Click **Review**.



2. You have the option to **Create Incident**, **Create Supplement**, **Create Case**, or **Create Case Activity**. (Forms must be enabled for these items to be included as check boxes on the form. This is done by an administrator.)

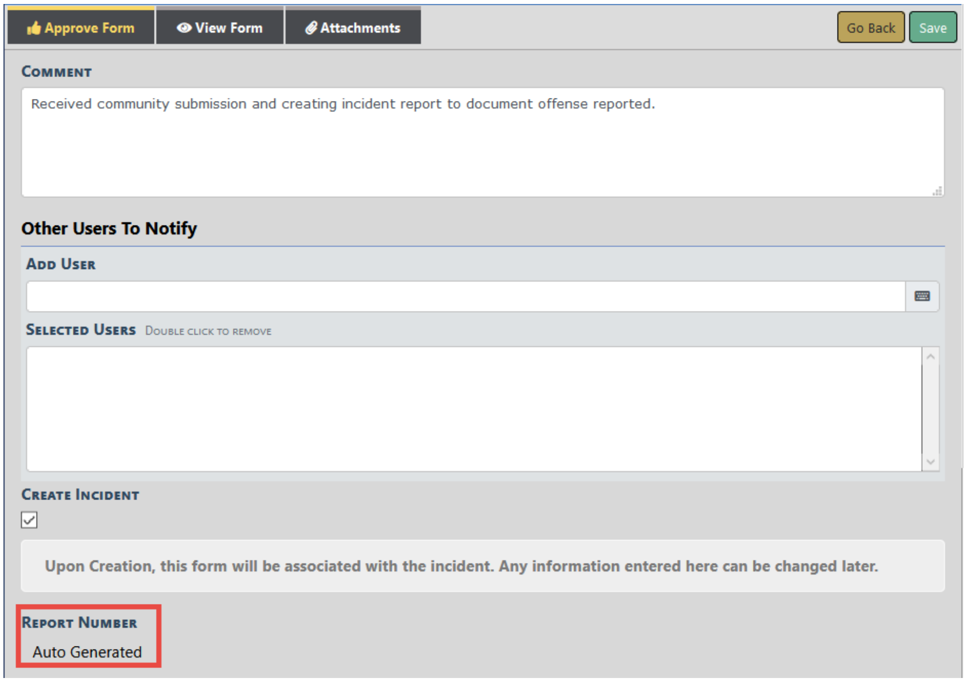
3. To create an incident, check the **Create Incident** box on the *Approve Form* tab.

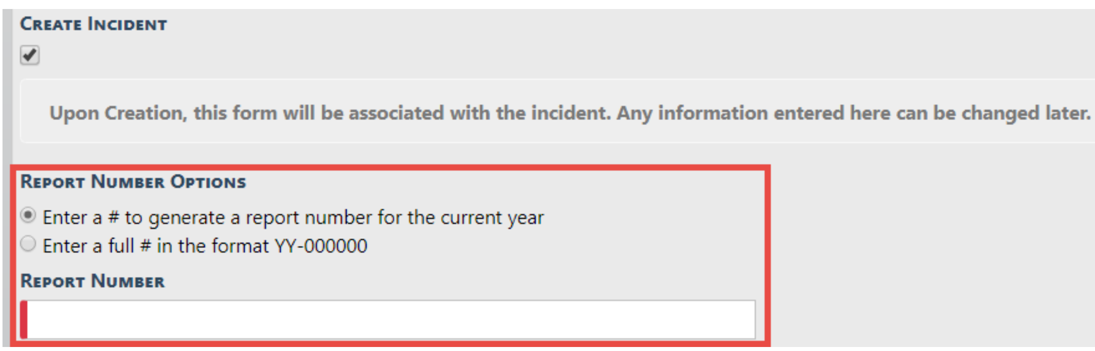
4. To create a supplement, check the **Create Supplement box** on the *Approve Form* tab. (Useres may search for an incident, then select it to create a supplement. It will attach the custom form to that incident within that supplement number.)

5. To create a case, check the **Create Case** box on the *Approve Form* tab. (This works much the same way as creating a supplement, and will attach the custom form as an attachment to the case.)

6. To create case activity, check the **Create Case Activity** box on the *Approve Form* tab. (Users must first search for a case, then create case activity on that case and attach the form. Attachments are made to the actual case, not the case activity.)

7. When you create an incident, depending on the configuration by your agency, the **Report Number** will either be *Auto Generated* or require *manual entry of a Case Number* requested and obtained from a CAD system, respectively as shown below.





If the Report Number is **Auto Generated** as shown in the first example above, no additional action is required for the Report Number.

If the **Report Number Options** displays as shown in the second example above, enter the **Report Number** based on one of the following options you choose:

a. The default option is to enter the digits of the Report Number obtained from CAD. RMS then generates the number using the **format defined**.

b. You can select the option to enter the **full #** obtained from CAD in the specified format.

8. Add **Other Users to Notify** to notify them for awareness purposes only. If your agency administrator requires at least one user, a note appears in red.

9. Complete the remaining fields on the *Approve Form* tab.

Note: The *View Form* tab easily switches views, to view the Form for information needed to complete the Incident Fields on the *Approve Form* tab.

a. **Report Date/Time** - Default to the system date and time. Update as needed.

b. **Occurrence Date/Time** - Set to the date and time reported by the form submitter.

c. **Incident Type** - This can be set to default to a **Type**, allowing tracking of incident reports originating from a *Publicly or Non-Publicly Available Custom Form*. If defaulted, it is recommended that you do not change the value.

d. **Summary** - This field relates to the Crime/Media Summary field on the incident report.

- Use the **Copy From** LOV to select copy text from a *Custom Form* field to the Summary.

- Use the LOV multiple times to **copy** information from multiple fields in the *Custom Form*.

e. **Responsible User** - Default to your name as the creator of the incident report. You can select another user from your agency to assign/transfer the report.

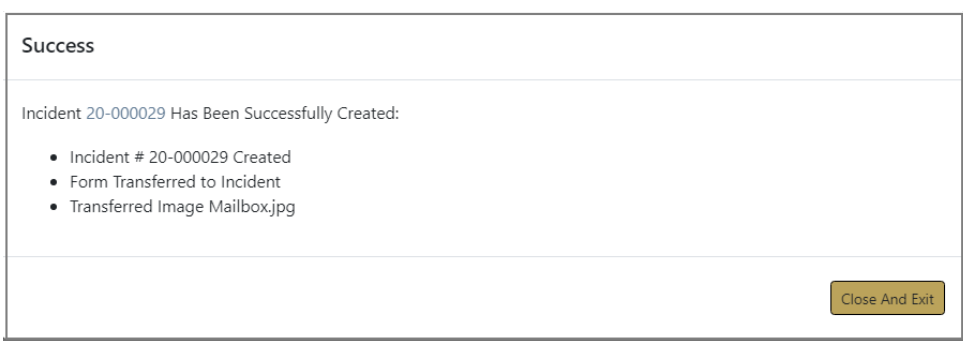
f. **Narrative** - Optional entry. Use this field to quickly create the Narrative for the incident report.

- Use the **Copy From** LOV to select copy text from a *Custom Form* field to the Narrative.

- Use the LOV multiple times to **copy** information from multiple fields in the *Custom Form*.

10. Click **Save** to create the **Incident Report** and set the **Status** of the *Custom Form* to **Reviewed**.

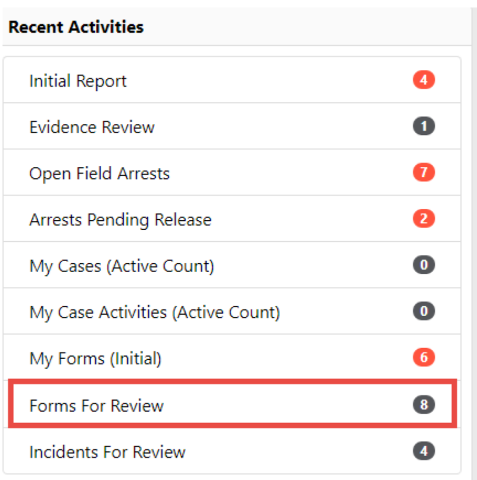
11. A message displays indicating an **Incident Report** was created and the *Custom Form* and Image were automatically associated to the **Incident Report**.



- The user assigned to the incident report can take action to complete the report from their **Recent Activities - Initial Report** queue.
- Complete the incident report, adding location, offenses, names, and property/vehicles as required.

Taking Action via Recent Activities

As an alternative to taking action via a *Notification*, you can, if you have access to review *Publicly or Non-Publicly Available Custom Forms*, **Take Action** from your *Recent Activities - Forms For Review* queue.



The process of reviewing the Custom Form from *Recent Activities* is the same as taking action from a *Notification*.

For information on accessing *Recent Activities*, refer to “Home Page - Prior to RMS 11.12” on page 8.

For information on taking action from a *Notification*, refer to “Taking Action via Notifications” on page 304.

Note: Once a *Form Review* is complete by either Accepting (Reviewing) or Rejecting the Custom Form, the notification deletes automatically and the Custom Form no longer appears for review in the *Recent Activities - Forms For Review* queue.

Chapter 16. Criminal Complaint

Criminal Complaint Overview

The **Criminal Complaint** module allows users, with appropriate permissions, to create and manage criminal complaints against arrestees and offenders, and approve or disapprove through a guided review process before submitting to the state.

> **Note:** To utilize this module, it must be turned on for your agency.

Your agency has the option to utilize a 1 or 2 level approval process:

1-Level Approval Process

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

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

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

2-Level Approval Process

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

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

The supervisor approves the complaint.

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

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

For more information on the approval process, refer to “Approve or Disapprove Criminal Complaint” on page 441.

Accessing Criminal Complaint Module

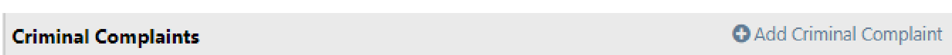
If turned on for your agency, and you have appropriate permissions, the **Criminal Complaint** module is accessible using various methods.

Standalone Module

To access the **Criminal Complaint** standalone module, select the **Criminal Complaint** option from the *Incidents* drop-down menu.

From the Field Arrest

There is a Criminal Complaints section on the Field Arrest, where you can, with appropriate permissions, add a Criminal Complaint or access existing Criminal Complaints.



For more information, refer to “Edit Field Arrest” on page 370.

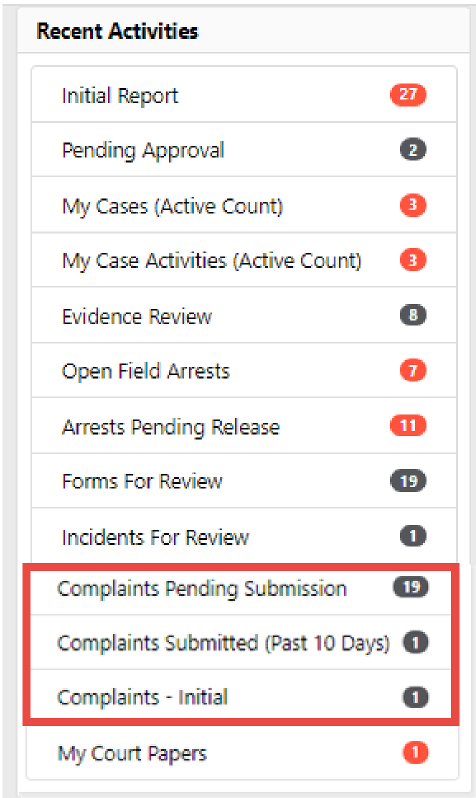
From the Incident Report

With appropriate permissions, you can add Criminal Complaints from the Actions Menu or the Criminal Complaints grid on the Summary tab of the Incident Report. You can also access existing Criminal Complaints from the Criminal Complaints grid.

For more information, refer to "Summary Tab" on page 252.

From Recent Activities

For your convenience, any **Initial Complaints**, **Complaints Pending Submission**, and **Complaints Submitted** within a past number of days defined by your administrator, appear under *Recent Activities* on your home page.



Click on an activity to display the result list, for quick access to view or edit a complaint to add Case Number, appearance information and more.

For more information on editing, refer to "Edit a Criminal Complaint" on page 320.

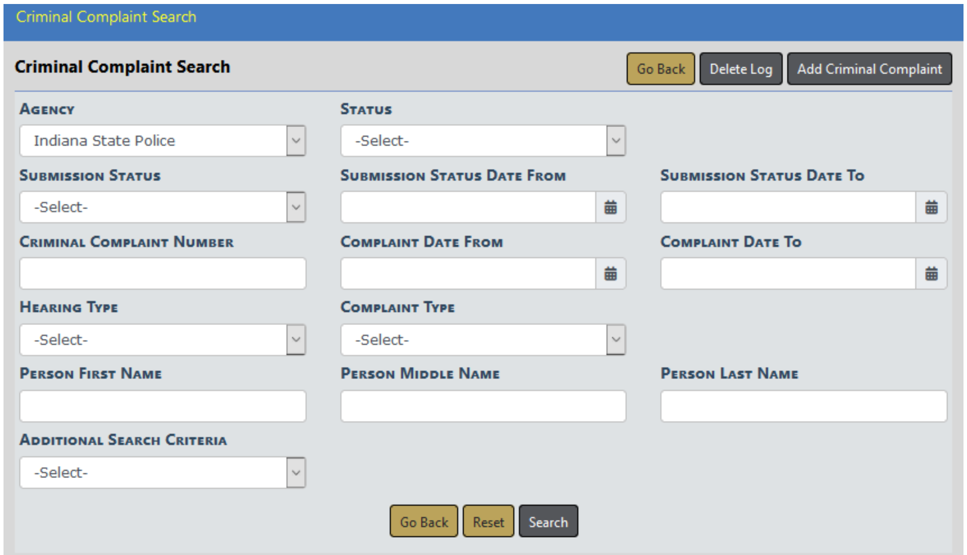
For more information on viewing, refer to "View a Criminal Complaint" on page 327.

Criminal Complaint Search

To search **Criminal Complaints** follow these steps:

1. Access the *Criminal Complaint* module. For instructions, refer to “Criminal Complaint Overview” on page 313.

2. A *Criminal Complaint Search* window appears.



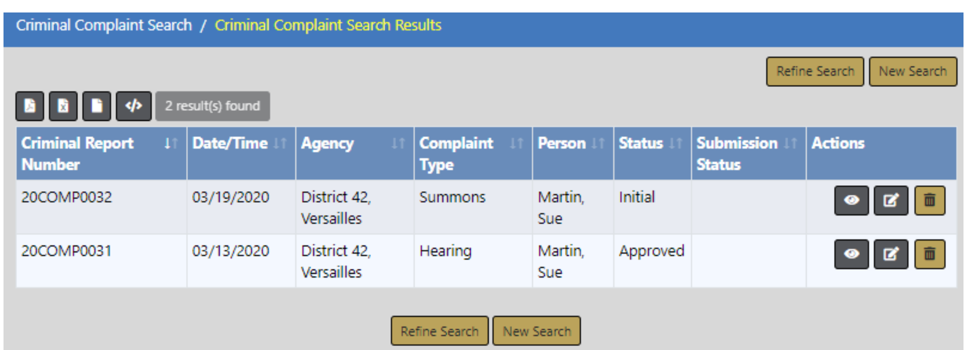
Note: Click on the **Add Criminal Complaint** button to add a **Criminal Complaint**. For more information, refer to "Add a Criminal Complaint" on page 317.

Note: Click on the **Delete Log** button to view the *Criminal Complaint Delete Log*, a listing of deleted Criminal Complaints.

3. Enter the search **criteria** into the fields provided. The more criteria you use, the shorter the results list.

   - Select **Additional Search Criteria** to search on Custom Fields.

4. Click the **Search** button to display the search results.



You can, with appropriate permissions, view, edit, and delete **Criminal Complaint** records from the results window.

- Click on the **View icon** to view. For more information on viewing, refer to “View a Criminal Complaint” on page 327.

- Click on the **Edit icon** to edit. For more information on editing the **Criminal Complaint**, refer to “Edit a Criminal Complaint” on page 320.

- Click on the **Delete icon** to delete, enter a **Comment** at the prompt to explain why you are deleting it, then click **Delete**.

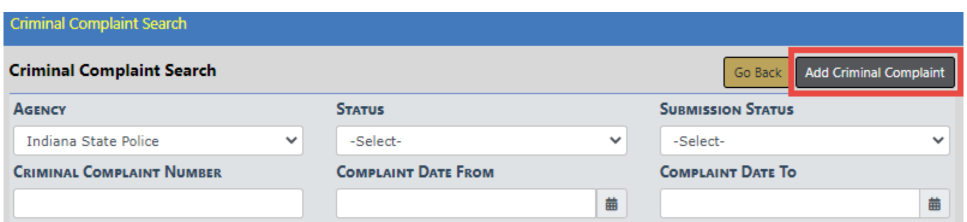
Add a Criminal Complaint

To add a **Criminal Complaint** record follow these steps:

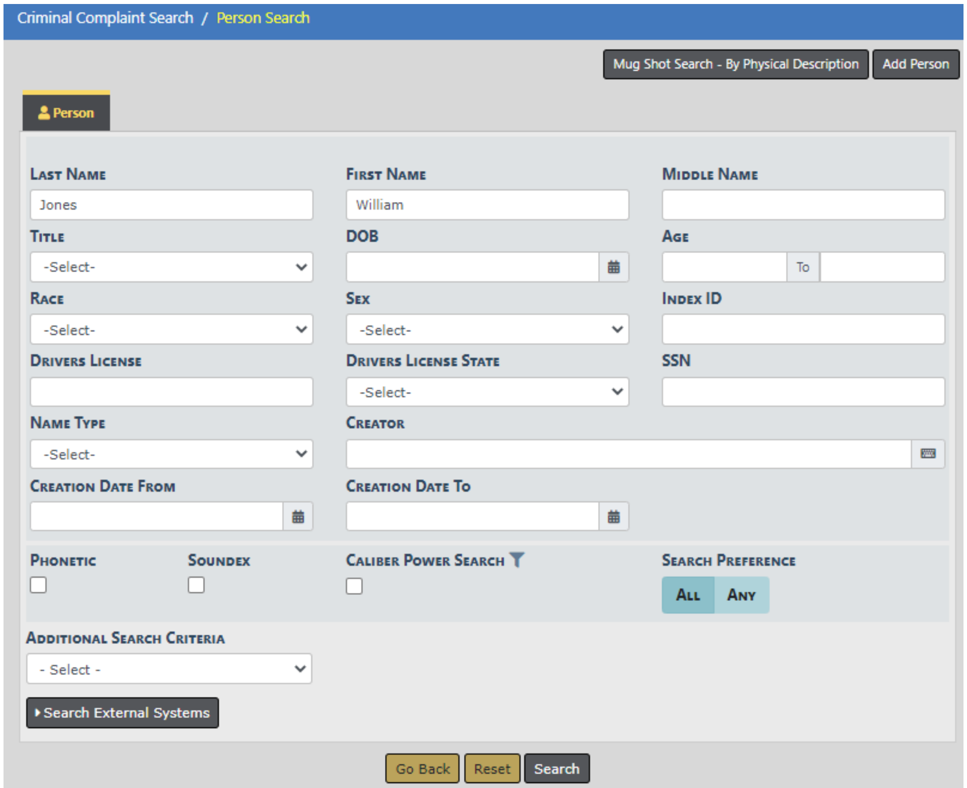
1. Access the *Criminal Complaint* module. For instructions, refer to “Criminal Complaint Overview” on page 313.

2. The *Criminal Complaint Search* screen appears. Before adding the criminal complaint, it is recommended you first search for the criminal complaint record to verify whether or not it already exists, though not required. For instructions on how to search refer to “Criminal Complaint Search” on page 315.

3. Click on the **Add Criminal Complaint** button on the *Criminal Complaint Search* screen.



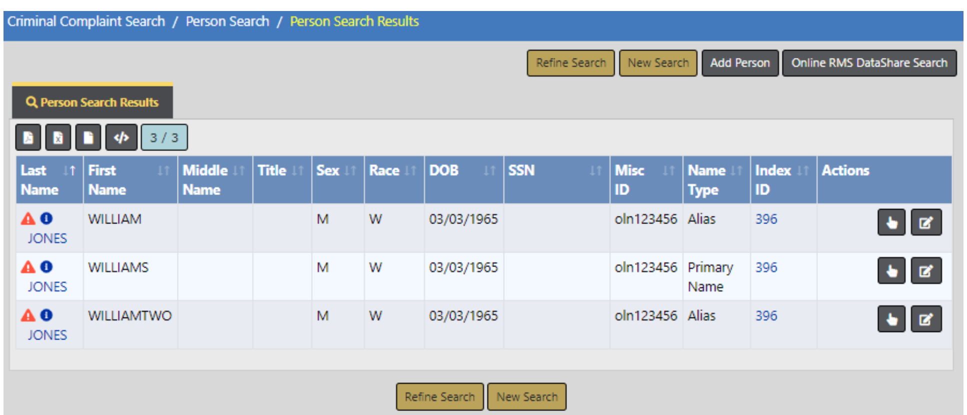
4. The *Criminal Complaint Search / Person Search* screen appears.



5. Enter the appropriate search **criteria** in the fields provided.

   For more information on the search criteria options, refer to “Searching Master Records” on page 87.

6. Click the **Search** button to display the search results.

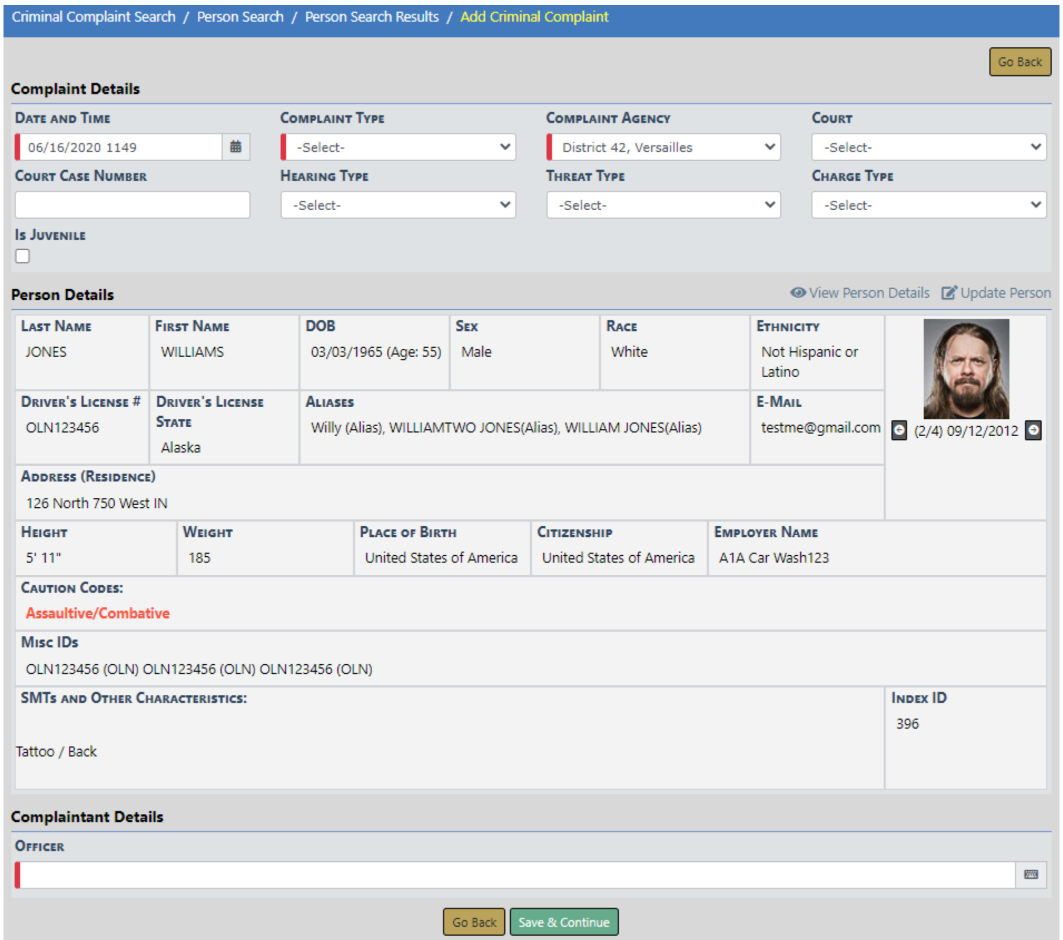


7. Click the **Select icon**  to choose the person record you want to associate with the **Criminal Complaint**.

If the person record doesn't exist in the results list, with appropriate permissions, you can click the **Add Person** button to add a *Master Person* record, then select it. For instructions on adding a *Master Person* record, refer to “Adding Person” on page 100.

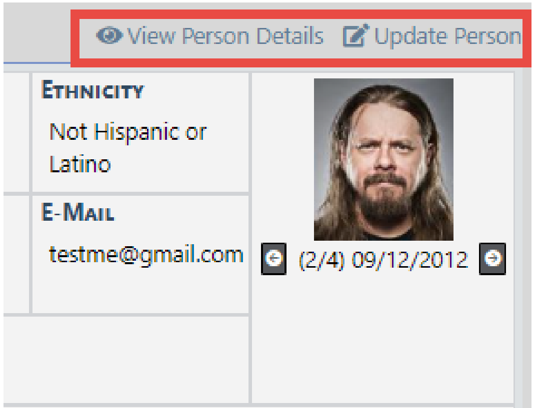
You have the option to click the **Edit icon** to update the master person record to correct or update person details before you select the record. You also have an opportunity to edit the person details from the *Add Criminal Complaint* screen on the next step.

8. The *Add Criminal Complaint* form opens.



9. Enter the information in the fields provided.

10. Optionally, view or update person details.



11. Click the **Save & Continue** button.

12. The *Edit Criminal Complaint* form opens.

13. Make the necessary updates. For more information on updating the Criminal Complaint record, refer to “Edit a Criminal Complaint” on page 320.

    Note: Criminal Complaints may be associated to citations in the same way arrests and incidents are associated in Criminal Complaints.

Edit a Criminal Complaint

To edit a **Criminal Complaint** record follow these steps:

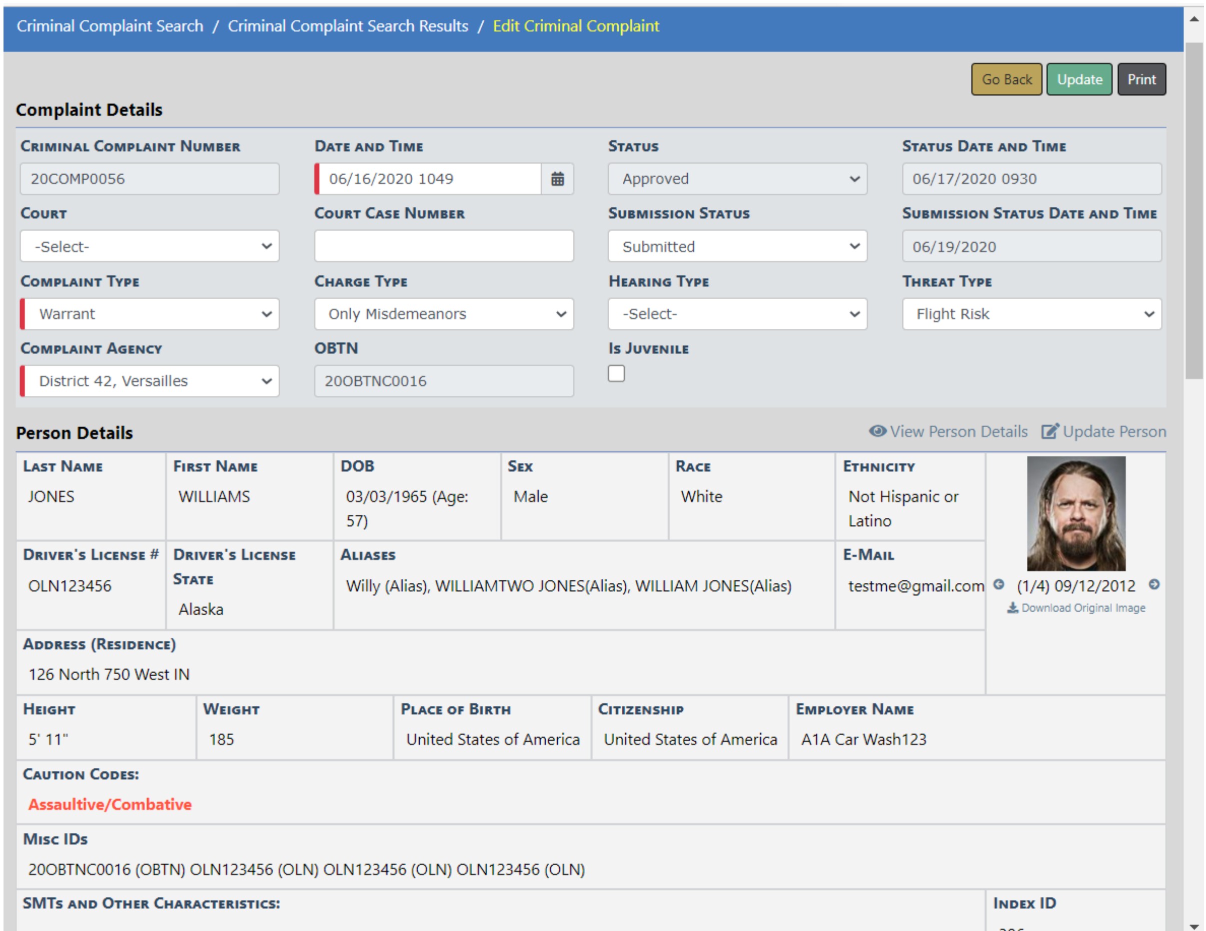
1. **Search** for the Criminal Complaint record you want to edit or access it from **Recent Activities** on your home page.

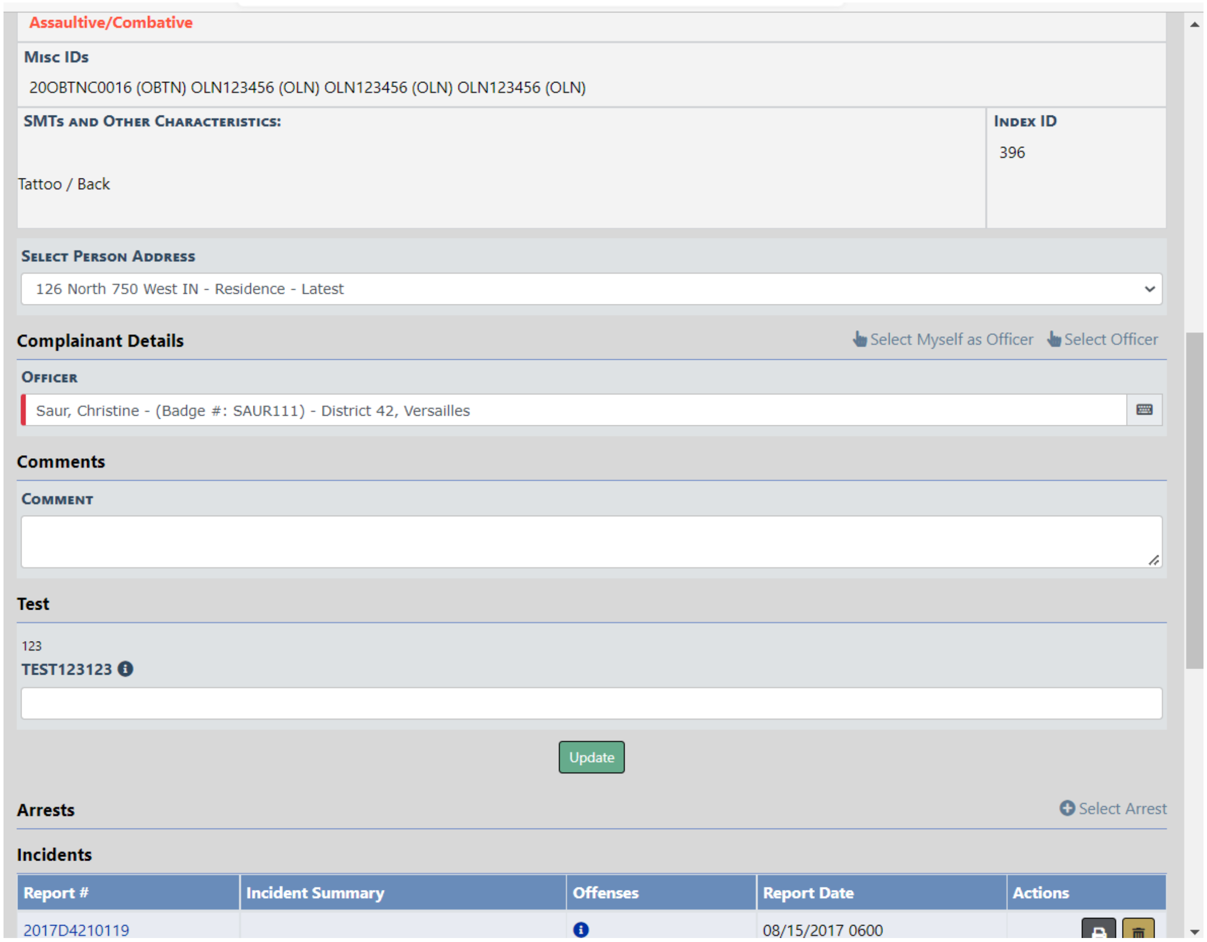
   For instructions on how to search refer to “Criminal Complaint Search” on page 315.

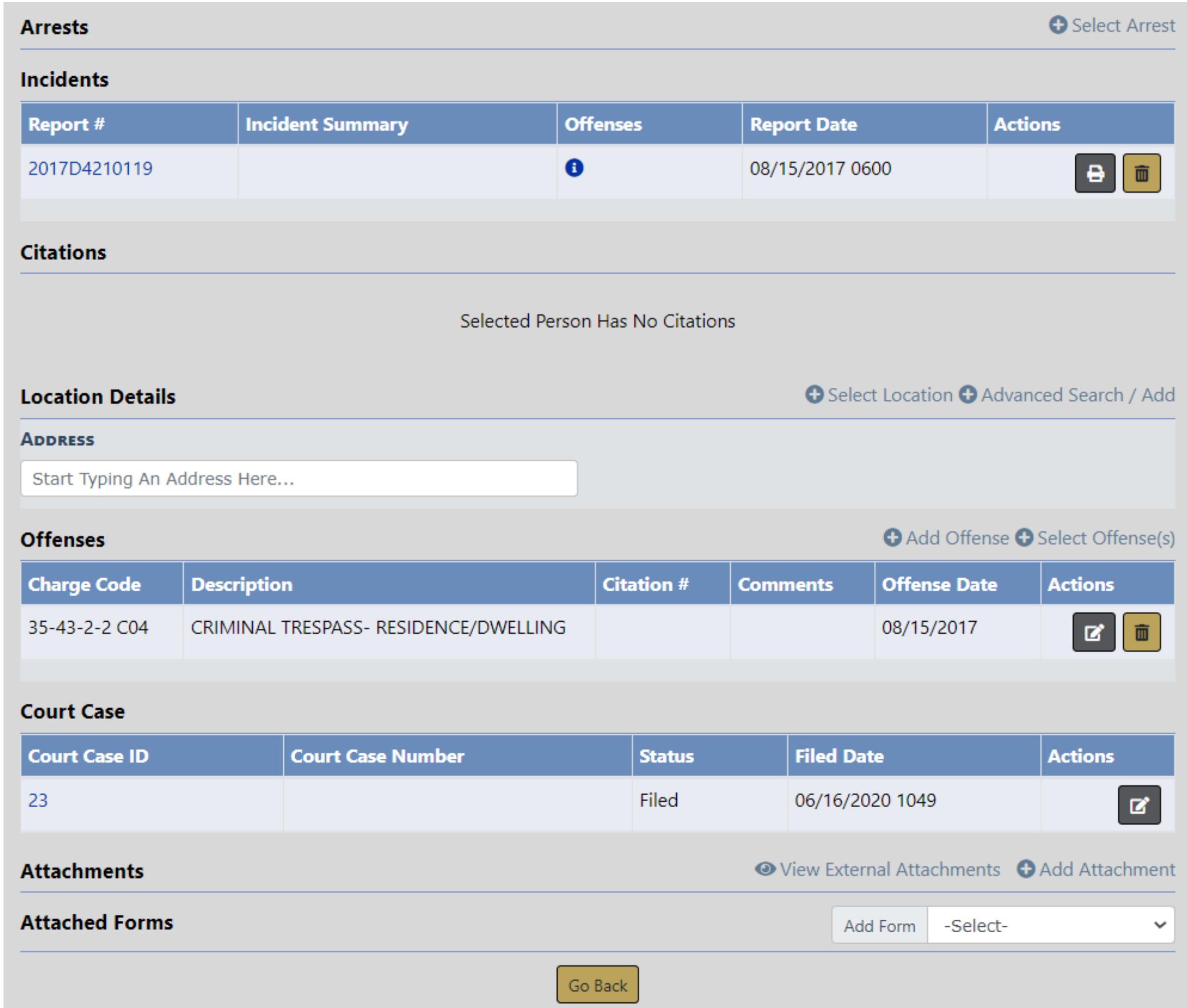
   For instructions on accessing from Recent Activities refer to "Criminal Complaint Overview" on page 313.

2. In the *Search Results* grid, click the **Edit icon**  on the record you want to update.

3. The *Edit Criminal Complaint* form opens.




Assaultive/Combative
Misc IDs
20OBTNC0016 (OBTN) OLN123456 (OLN) OLN123456 (OLN) OLN123456 (OLN)
SMTs and Other Characteristics:
Index ID
396
Tattoo / Back
Select Person Address
126 North 750 West IN - Residence - Latest
Complainant Details
Select Myself as Officer
Select Officer
Officer
Saur, Christine - (Badge #: SAUR111) - District 42, Versailles
Comments
Comment
Test
123
TEST123123
Update
Arrests
Select Arrest
Incidents
Report #
Incident Summary
Offenses
Report Date
Actions
2017D4210119
08/15/2017 0600



With Online RMS version 11.5 and higher, certain fields are set as required or disabled and the available **Hearing Type** list of values changes based on the selected **Complaint Type**.

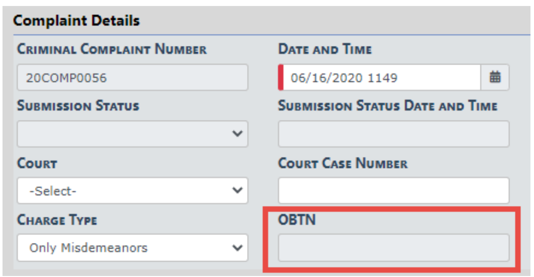
<u>Examples:</u>

- If **Complaint Type** = *Arrest*, then **Charge Type**, *Hearing Type* and *Threat Type* list of values become disabled to not allow entry.
- If **Complaint Type** = *Warrant*, then **Charge Type** and **Hearing Type** list of values becomes disabled to not allow entry and **Threat Type** becomes required.

Note: Configurations for required and disabled fields are managed by Caliber Admins. If your agency uses Criminal Complaints and would like to use these configurations, please contact Caliber Public Safety Support.

Note: Criminal Complaints may be associated to citations in the same way arrests and incidents are associated in Criminal Complaints.

If the Criminal Complaint is associated with a Field Arrest, the **Arrest Tracking Number** displays as read-only. The label could show **Arrest Tracking Number**, or **OBTN**, depending on your agency's configuration.



4. **Select Person Address** from the available choices.

5. Select **Officer** under the Complainant Details section.

   The select officer link displays a dialog listing all officers on associated arrests and incidents for quick selection.

   You can quickly select any officer associated to the incidents and arrests identified on the criminal complaint record.

   Click **Select Myself as Officer** to set the officer as yourself, click **Select Officer** to select an officer from an associated record, or type in the auto-complete field to add any other officer.

   Only one officer can be chosen.

6. Enter any **Comments**.

7. Make any necessary updates in the available fields near the top of the form, then click the **Update** button to save your changes.

8. If applicable, click the **Select Arrest** link to associate an *Arrest* with the Criminal Complaint, based o the Criminal Complaint person's involved records.

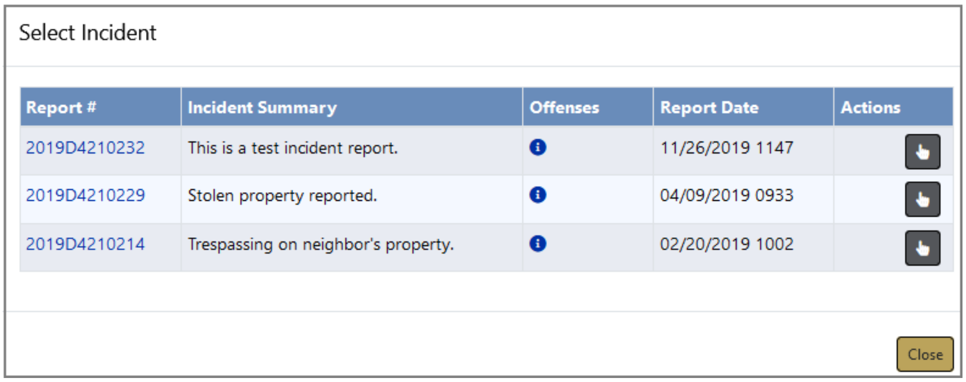
   Only one *Arrest* can be associated with the Criminal Complaint. The **Select Arrest** link does not display when an *Arrest* association exists.

   The OBTN, if initially blank, populates automatically from the associated *Arrest* record.

For more information on arrests, refer to “Field Arrest Overview” on page 355.

9. If applicable, click the **Select Incident** link to associate an *Incident* with the Criminal Complaint.

Note: The **Select Incident** link only displays if there are incidents where the person on the complaint is the offender.



Only one *Incident* can be associated with the Criminal Complaint.

a. **Select** the applicable Incident.

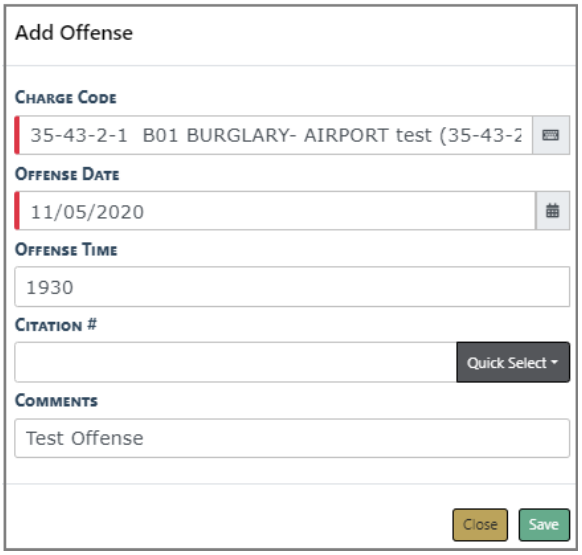
b. The selected *Incident* displays in the grid. The **Select Incident** link does not display when an *Incident* association exists.

If there is an arrest associated with the incident where the arrestee is the complaint defendant, Online RMS adds the arrest to the complaint, if not already associated. If that arrest has an OBTN, the OBTN is also added to the complaint.

10. If applicable, begin typing the address in the Location Details **Address** field. Select the appropriate address. Existing locations may be removed and new ones added, if needed. You may be prompted to add a county if required by your agency.

11. Click **Add Offense** or **Select Offense(s)** to include at least one Offense.

a. If you choose **Add Offense**, an *Add Offense* dialog box appears.

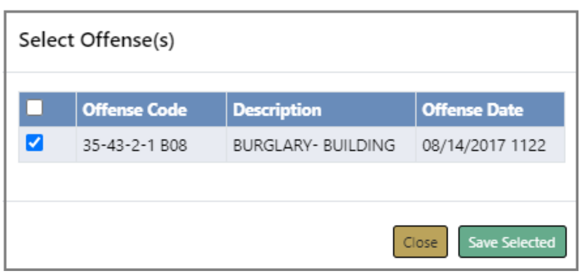


Enter the **Charge Code**, **Offense Date**, **Offense Time**, **Citation #**, and **Comments** where applicable.

Click **Save**.

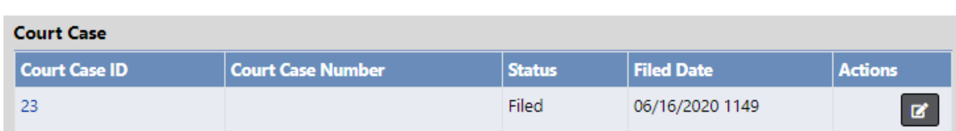
Note: If you enter a charge code that is associated with **Tokens**, additional token fields appear. These tokens submit with each charge if the complaint is submitted to the court.

b. If you choose **Select Offense(s)**, a list appears of offenses that are on the associated Incidents.



Check each Offense you wish to include, then click **Save Selected**.

12. If applicable, click on the Edit icon to update any **Court Case** that may be associated to the Criminal Complaint.



For general information about Court Case, refer to “Court Case Overview” on page 333.

For more information on updating a Court Case, refer to “Edit Court Case” on page 338.

13. Optionally, add any **Attachments**

    For more information on adding Attachments, refer to "Add Attachments" on page 69.

14. If Applicable for your agency, optionally attach a custom form by selecting from the list under the **Attached Forms** section.

    a. Once you select a custom form, the form opens. Complete the necessary information then click **Save** or **Save and Exit**.

15. If applicable, click on the **Print** button on the top right to print the Criminal Complaint record. A PDF file opens as a new tap in your browser where you can print or save the document. If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

16. Click the **Submit For Approval** button on the top right, whenever you are ready to submit the Criminal Complaint for approval.

    For more information, refer to "Submit Criminal Complaint for Approval" on page 329.

View a Criminal Complaint

To view a **Criminal Complaint** record follow these steps:

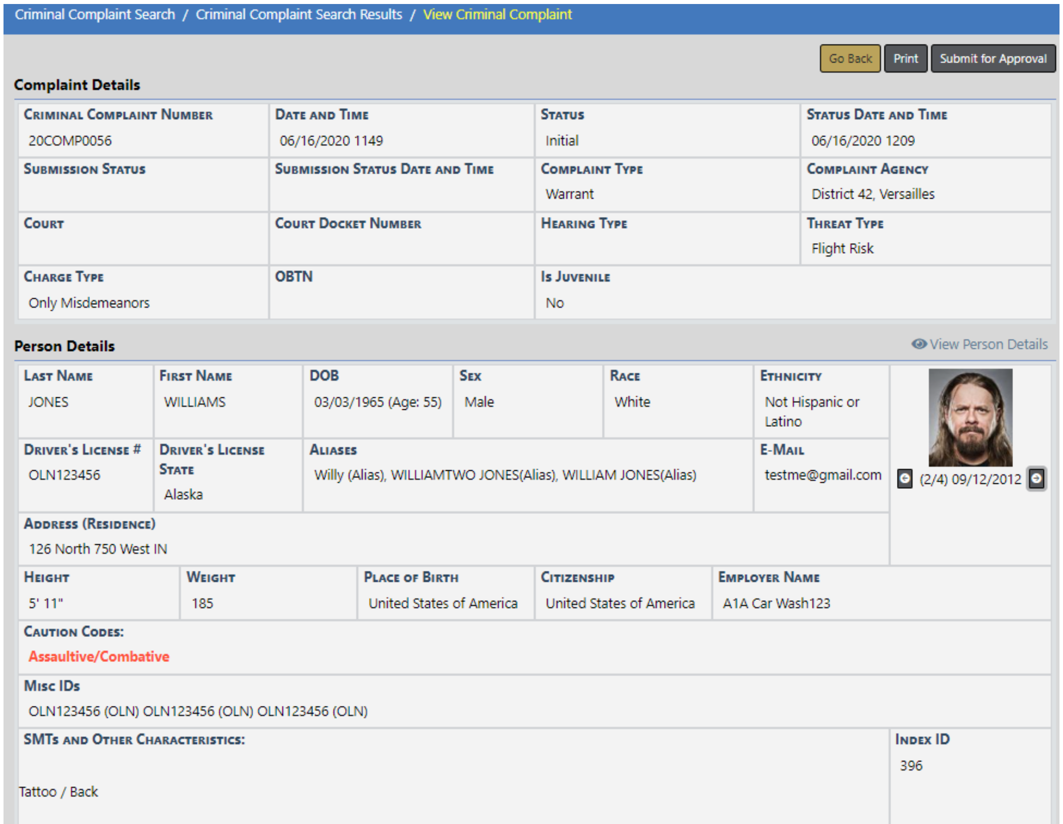
1. **Search** for the Criminal Complaint record you want to view or access it from **Recent Activities** on your home page.

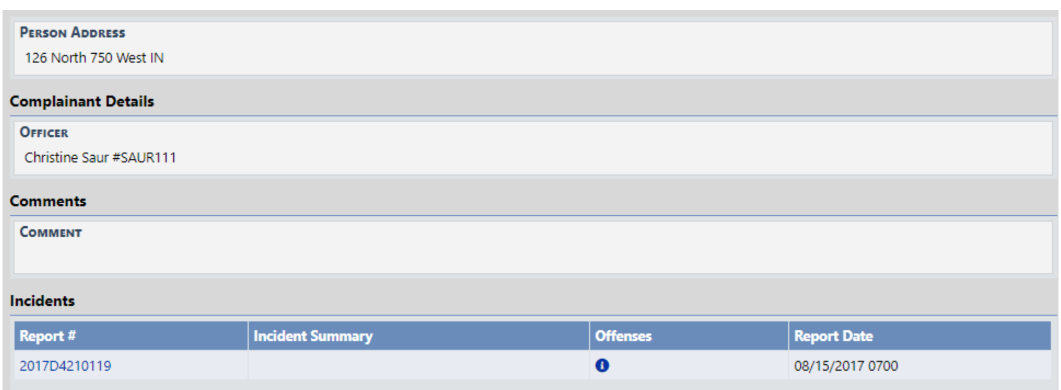
   For instructions on how to search refer to "Criminal Complaint Search" on page 315.

   For instructions on accessing from Recent Activities refer to "Criminal Complaint Overview" on page 313.

2. In the *Search Results* grid, click the **View icon**  on the record you want to view.

3. The *View Criminal Complaint* form opens.





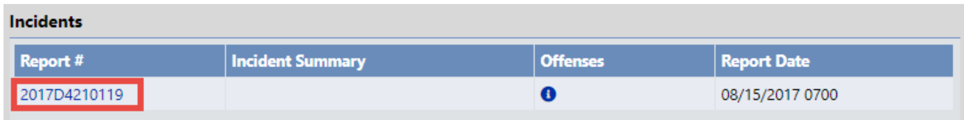
Arrests that are associated with the Criminal Complaint appear in a grid near the bottom, similar to Incidents.

View Criminal Complaint is read-only.

For instructions on editing, refer to “Edit a Criminal Complaint” on page 320.

4. Optionally, click the **Print** button to print, if applicable; A PDF file opens as a new tab in your browser from where you can print or download. If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

5. Optionally, click on the Incident **Report #** link or the view icon , if applicable, to open the Incident Report associated to the **Criminal Complaint**.



6. Click the **Submit For Approval** button to submit the **Criminal Complaint** for approval.

   For more information, refer to "Submit Criminal Complaint for Approval" on page 329.

Submit Criminal Complaint for Approval

You can submit a **Criminal Complaint** record for approval two ways:

- From the *View Criminal Complaint* form.
- From the *Edit Criminal Complaint* form.

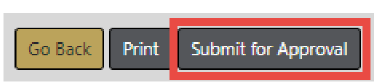
To submit for approval, follow these steps:

1. Access the *View* or *Edit Criminal Complaint* form.

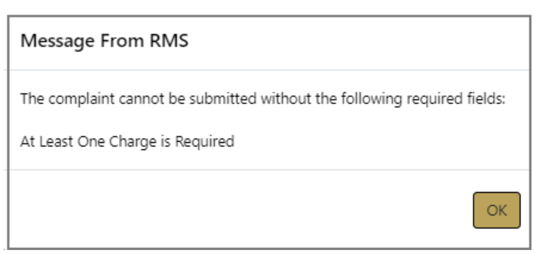
   For instructions on viewing, refer to "View a Criminal Complaint" on page 327.

   For instructions on editing, refer to "Edit a Criminal Complaint" on page 320.

2. Click on the **Submit for Approval** button on the top right of the form.



3. A message appears when more information is needed before you can submit the request. If this message does not appear, continue to the next step.



Note: The content of the message box varies, as it is based on missing information. (i.e., One charge code required, DOB required, etc.)

a. Make note of the needed corrections, then click **OK**

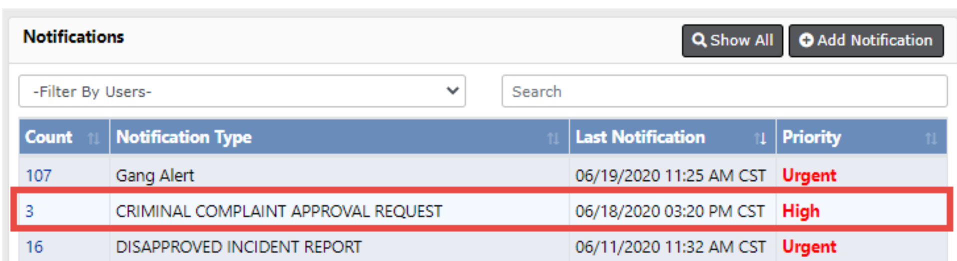
b. *Edit* the **Criminal Complaint** record to include the missing information.

For instructions, refer to “Edit a Criminal Complaint” on page 320. You can then submit for approval from the *Edit Criminal Complaint* page after you have made the appropriate corrections.

4. If the **Arrest Tracking Number** (**OBTN**) is blank, then a message box appears informing you that this number is required to submit for approval.

   Answer **Yes** to generate the number.

5. Online RMS sets the **Criminal Complaint** status to *Pending Approval* and it generates a *Criminal Complaint Approval Request* notification to users with the role configured for the notification type.



Note: After submitting for approval, and if you have *Review* permissions, Online RMS immediately displays the *Edit Complaint* screen with the **Approve/Disapprove** buttons allowing for self-approval. If you also have *Submit* permissions and your agency is configures for court submissions, the **Approve & Submit** button displays.

- If the complaint is **Disapproved**, Online RMS generates a notification to the creator of the Criminal Complaint. The creator has the option to resubmit for approval. For more information, refer to “ Take Action on Disapproved Notifications” on page 331.
- If the complaint is **Approved**, Online RMS creates a Court Case automatically, providing your agency has the Court Case module turned on. For more information on Court Cases, refer to “Court Case Overview” on page 333.

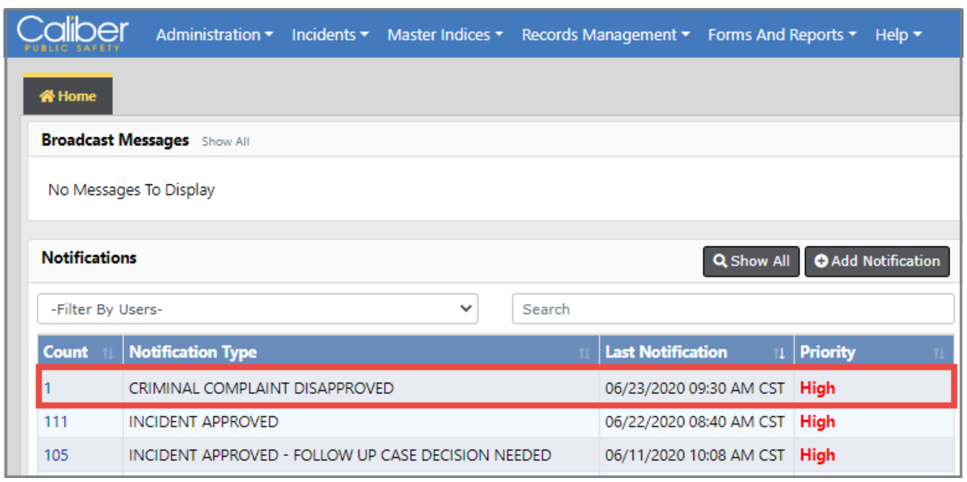
Note: For users with a printed criminal complaint, on submission to the court, a PDF of the printed complaint will be generated automatically and attached to the criminal complaint itself.

- If the approved complaint data is **Submitted** to the court and is **successful**, the *Submission Status* on the Criminal Complaint changes to *Submitted* automatically.
- If the approved complaint data is **Submitted** to the court and is **unsuccessful**, the *Submission Status* on the Criminal Complaint changes to *Submission Error* automatically. You can review and update the Criminal Complaint as needed, then resubmit. For more information on court submissions, refer to “Approve or Disapprove Criminal Complaint” on page 441.

For information on the approval process, refer to “Approve or Disapprove Criminal Complaint” on page 441.

Take Action on Disapproved Notifications

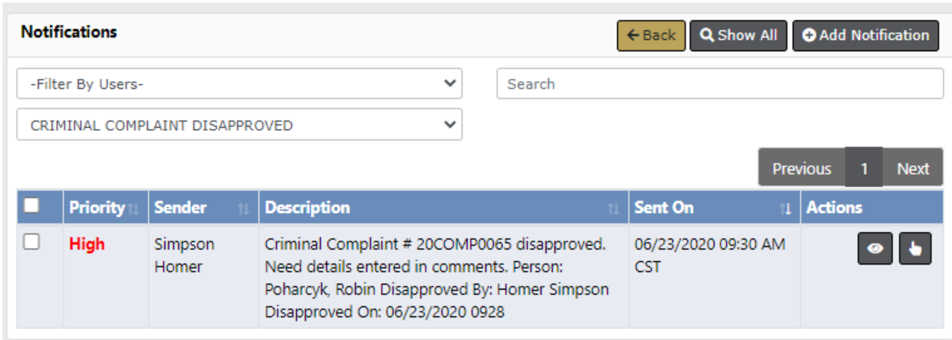
If the supervisor *Disapproves* your *Criminal Complaint Request for Approval*, Online RMS generates and sends you a **Disapproved** notification.



For more information on Notifications refer to "Notifications" on page 25.

Follow the steps below take action on the notification:

1. Click on the **Count** in the first column of the notification grid to view the *Criminal Complaint Disapproved* list. There is only one in this example.



2. Click the **Select icon**  on the Criminal Complaint record to open *Edit Criminal Complaint*.

3. Review and make the appropriate changes, then click the **Update** button.

   For instructions on editing, refer to “Edit a Criminal Complaint” on page 320.

4. Click on the **Submit for Approval** button on the top right of the form.

For more information on submitting for approval, refer to “Submit Criminal Complaint for Approval” on page 329.

Chapter 17. Court Case

Court Case Overview

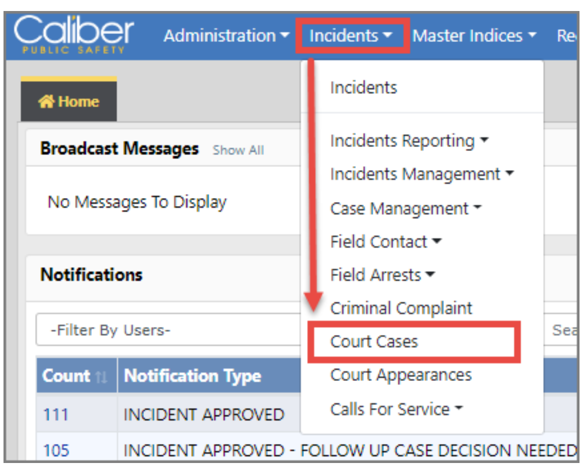
The **Court Case** module allows users, with appropriate permissions, to create and manage court cases against arrestees and offenders.

Accessing the Court Case Module

The **Court Case** module must be turned on for the agency, and users with appropriate permissions can access it using various methods.

Standalone Module

To access the standalone **Court Case** standalone module, select the **Court Cases** option from the *Incidents* drop-down menu.



For information on searching for a **Court Case**, refer to "Court Case Search" on page 334

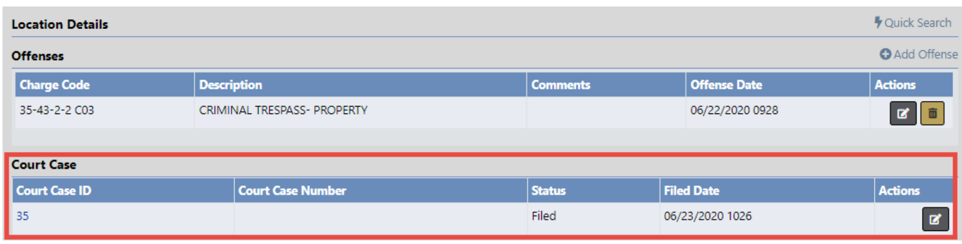
From the Criminal Complaint

You can access **Court Cases** that are associated with Criminal Complaints.

1. Access the appropriate Criminal Complaint.

   For more information on accessing, refer to “Criminal Complaint Overview” on page 313.

2. On the Criminal Complaint record, page down to the **Court Case** section.



3. Click the **Court Case ID** link to view the record, or click the **Edit icon** to update the Court Case record.

   For more information on updating the **Court Case** record, refer to “Edit Court Case” on page 338.

From the Incident Report

You can create or view associated **Court Cases** while viewing or editing an Incident Report.

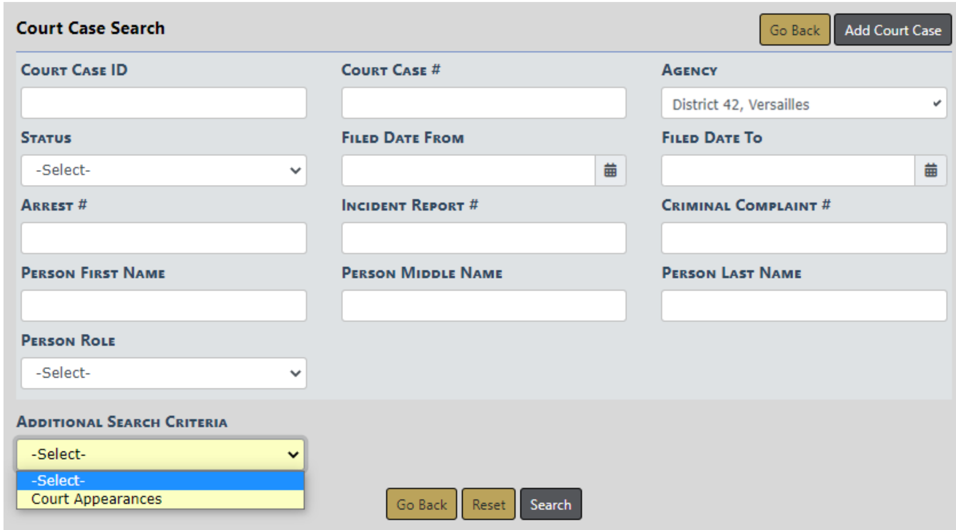
For details, refer to "View Incident Reports" on page 265 and "Summary Tab" on page 252.

Court Case Search

To search **Court Cases** follow these steps:

1. Access the standalone *Court Case* module. For instructions, refer to “Court Case Overview” on page 333.

2. A *Court Case Search* window appears.

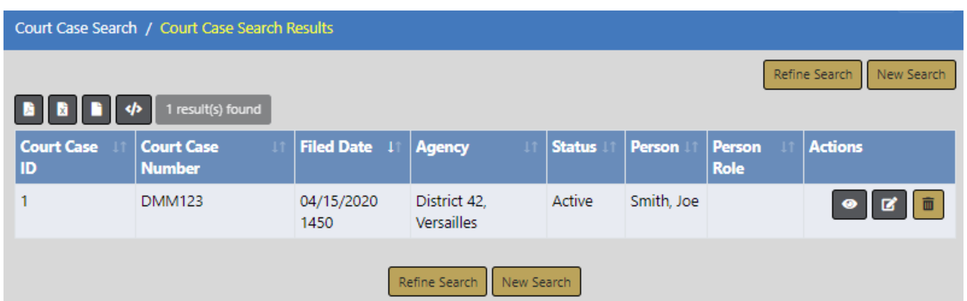


Note: You can click on the **Add Court Case** button to add a **Court Case**. For more information, refer to "Court Case Add" on page 336

3. Enter the search **criteria** into the fields provided. The more criteria you use, the shorter the results list.

   You can also search by **Court Appearances** located in the *Additional Search Criteria* drop-down list. Additional search fields appear when choosing this option.

4. Click the **Search** button to display the search results.



Note: If you elect to include Court Appearances in your search, the results list will also include various Court Appearance fields such as, ID, date, type, status, reason, and officer.

You can, with appropriate permissions, view, edit, and delete **Court Case** records from the results window.

- Click on the **View icon**  to view. For more information on viewing, refer to

- Click on the **Edit icon** to edit. For more information on editing the **Court Case**, refer to .

- Click on the **Delete icon** to delete, enter a **Comment** at the prompt to explain why you are deleting it, then click **Delete**.

Court Case Add

There are two ways to add a Court Case:

- Through the standalone Court Case module.

- Through the Criminal Complaint module, if your agency has the module turned on.

  - The Court Case is created automatically from the Criminal Complaint when it is approved. The information from the Criminal Complaint pulls into the Court Case record automatically.

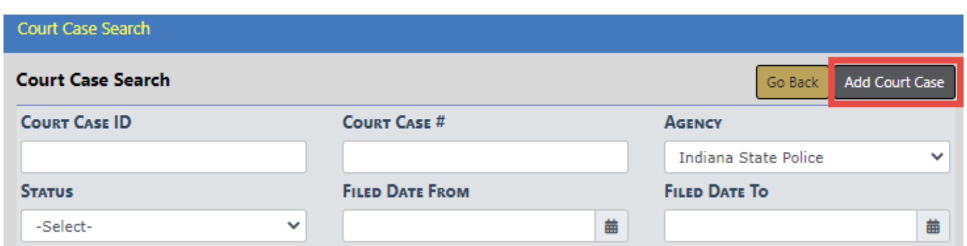
  For more information on Criminal Complaint, refer to “Criminal Complaint Overview” on page 313.

To add a **Court Case** record follow these steps:

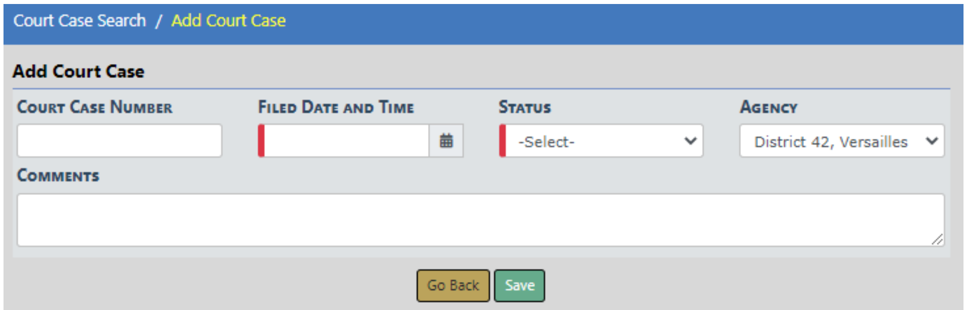
1. Access the standalone *Court Case* module. For instructions, refer to “Court Case Overview” on page 333.

2. The *Court Case Search* screen appears. Before adding the court case, it is recommended you first search for the court case record to verify whether or not it already exists, though not required. For instructions on how to search refer to “Court Case Search” on page 334.

3. Click on the **Add Court Case** button on the *Court Case Search* screen.



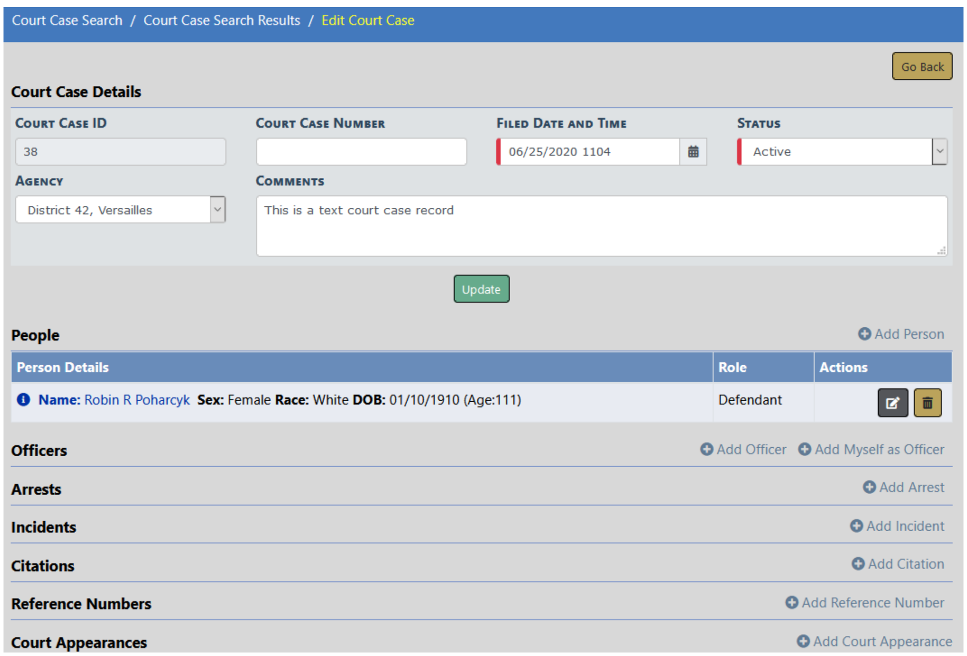
4. The *Add Court Case* screen appears.



5. Enter the appropriate information in the fields provided.

6. Click **Save**.

7. The *Edit Court Case* screen appears.



8. Optionally, make the necessary changes in the fields provided on the top section of the screen, then click **Update**.

9. Optionally, add other data to the **Court Case**, such as People, Officers, Arrests, Incidents, Reference Numbers, Court Appearances, and Attachments.

   For more information, refer to “Edit Court Case” on page 338.

Edit Court Case

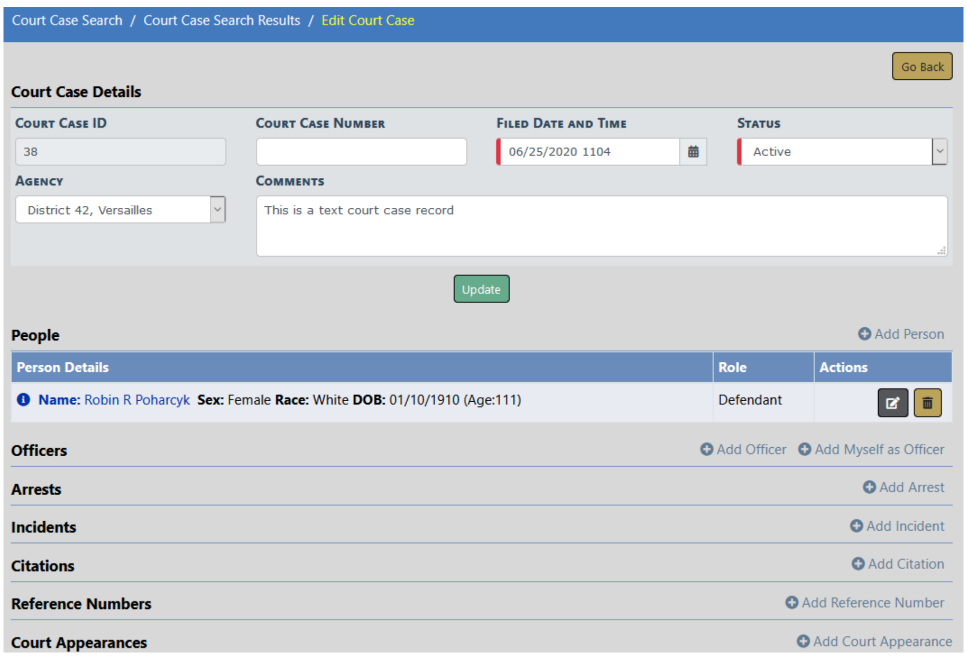
To edit a **Court Case** record follow these steps:

1. Access the **Court Case** record you want to edit.

   You can access the record by searching for the **Court Case**, or by accessing the Criminal Complaint record to which a **Court Case** is associated.

   For more information on the different methods of accessing the **Court Case**, refer to "Court Case Overview" on page 333.

2. After selecting the appropriate **Court Case**, the *Edit Course Case* opens.

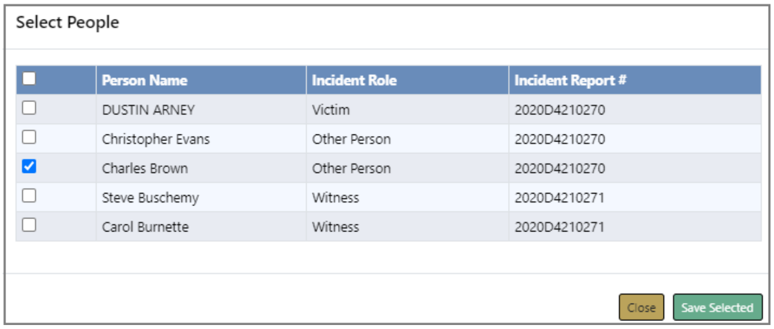


3. Click the **Select People** or **Add Person** link to add one or more people to the Court Case.

Note: The Person grid only shows a **Select People** link if there are associated incidents.

Select People:

a. Choose the appropriate people from the list that appears.



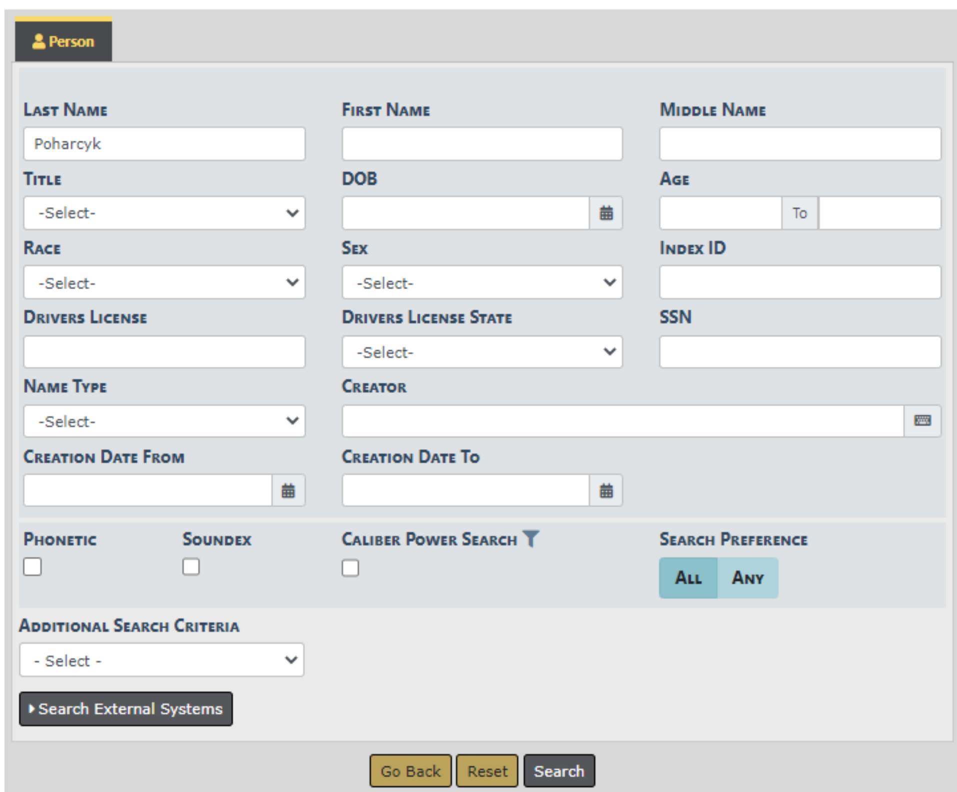
b. Click **Save Selected**.

c. The people you added now appears under the *People* section of the *Edit Court Case* screen.

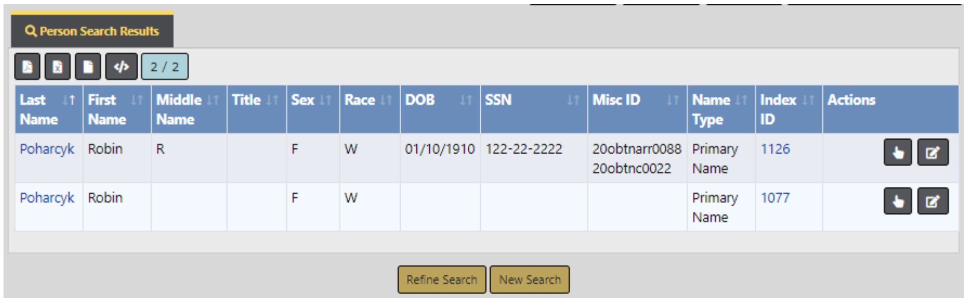
With appropriate permissions, you can edit the person record, or delete it from the **Court Case**. Deleting does not delete the person record itself, it removes the association only.

<u>Add Person</u>:

a. The *Person Search* screen appears.



b. Enter the search criteria, then click **Search** to display the search results.



c. Click the **Select icon** on the appropriate person record to add the person to the **Court Case**.

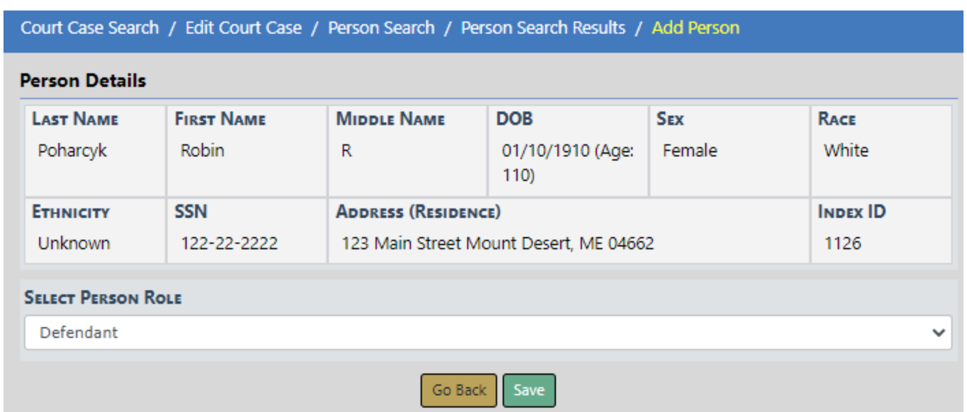
Note: If the person you want to add to the **Court Case** does **not** exist in your search, with appropriate permissions you can add the master person to Online RMS, then add that person to the **Court Case**.

For more information on master indices, refer to "Master Indices Overview" on page 83.

For more information on searching master records, refer to “Searching Master Records” on page 87.

For more information on adding a master person index record, refer to “Adding Person” on page 100.

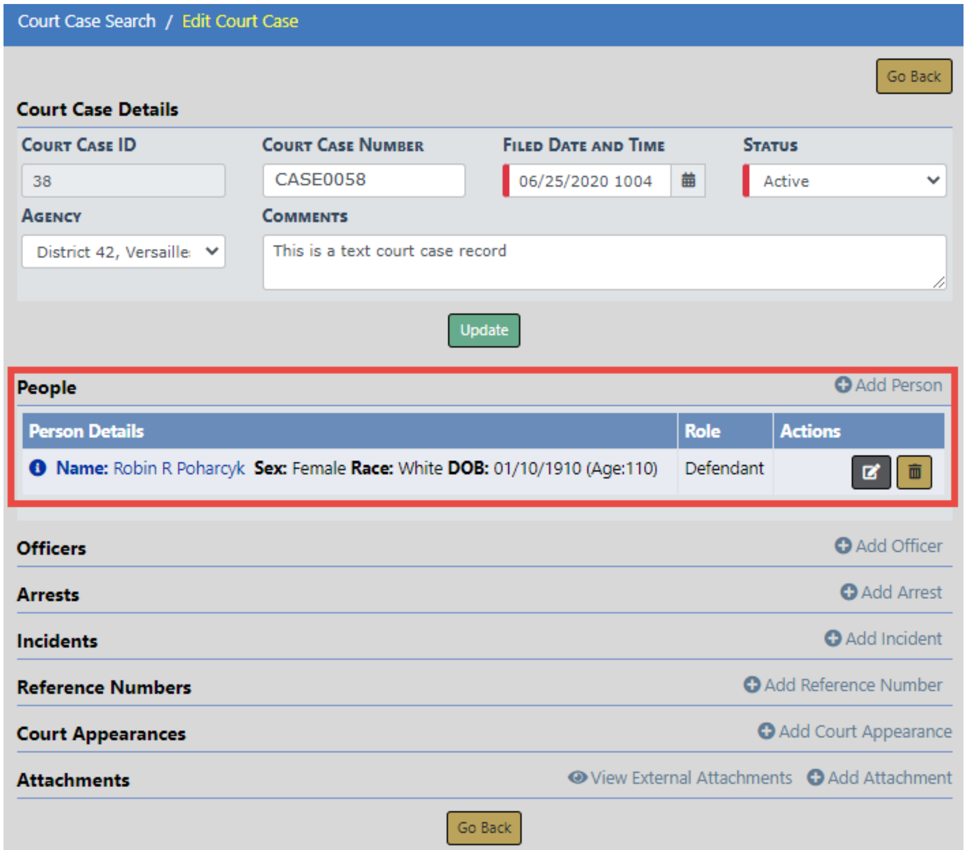
d. After selecting the appropriate person, the **Add Person** screen appears.



e. Select the **Person Role** for that person.

f. Click **Save**.

g. The person now appears under the *People* section of the *Edit Court Case* screen.



With appropriate permissions, you can edit the person record, or delete it from the **Court Case**. Deleting does not delete the person record itself, it removes the association only.

4. Optionally, add other associations to the Court Case, such as Officers, Arrests, Incidents, Citations, Reference Numbers, Court Appearances, and Attachments.

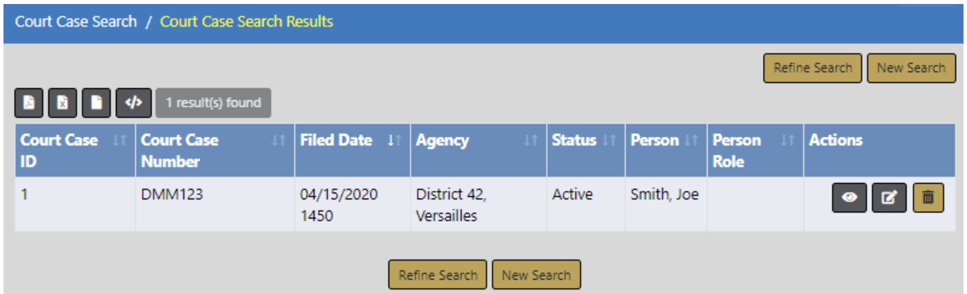
Note: For more information on Court Appearances, refer to “Court Appearances Overview” on page 345.

View Court Case

To view a **Court Case** record follow these steps:

1. **Search** for the Court Case record you want to view. For instructions on how to search refer to “Court Case Search” on page 334.

2. In the *Search Results* grid, click the **View icon** on the record you want to view.



3. The *View Court Case* form opens.

View Court Case is read-only. For instructions on editing, refer to “Edit Court Case” on page 338.

4. Optionally, click on the person name, Arrest ID, Court Appearance ID, etc., to view details.

People

Person Details	Role
Name Susan Marie Smithson **Sex:** Female **Race:** White	
Name Joe Smith **Sex:** Male **Race:** White	

Arrests

Arrest #	Arrest Date	Agency	Charges	Last Name	First Name
2003602	03/10/2020 1351	District 42, Versailles	CRIMINAL TRESPASS- AUTO	Smithson	Susan

Court Appearances

Court Appearance ID	Type	Appearance Date / Time	Status	Reason	Officers
19	OFFICER	05/14/2020 1410	Active	REASON 1	Brandon Pangle 8888a District 42, Versailles
2	OFFICER	04/15/2020 1436	CWOF	REASON 2	Charles Livingwell 2014 District 42, Versailles

Chapter 18. Court Appearances

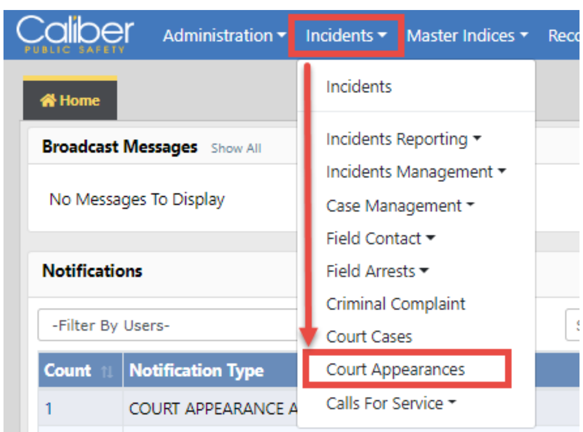
Court Appearances Overview

Court Appearances are added through the Court Case module. A Court Appearance cannot exist without a Court Case.

Accessing Court Appearances

From the Incidents Top Menu

Select **Court Appearances** from the *Incidents* drop-down menu.



You must have *Manage Court Appearances* permissions to see the **Court Appearances** option on the list.

The *Search Court Appearances* form opens. Search for and select the Court Appearance record.

For information on searching **Court Appearances**, refer to "Court Appearances Search" on page 348.

From the Court Case

Court Appearances are associated to Court Cases.

1. Access the appropriate Court Case.

   For more information on accessing Court Cases, refer to “Court Case Overview” on page 333.

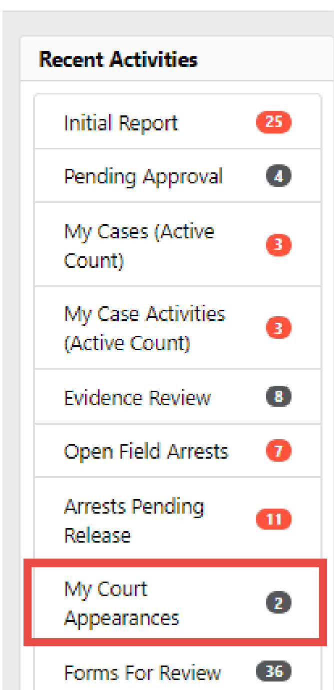
2. On the Court Case record, page down to the **Court Appearances** section.

Court Appearances — Add Court Appearance

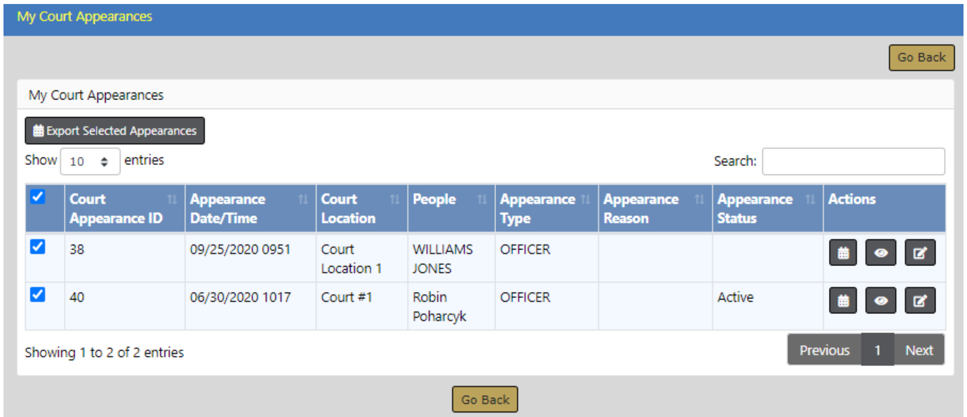
Court Appearance ID	Type	Appearance Date / Time	Status	Reason	Officers	Actions
14	OFFICER	02/01/2020 1409			Christian (osuper) Fred Gordmanson Badge #: 200 District 21, Toll Road - SC	
31	OFFICER	09/05/2020 1153	Active		Charles Livingwell Badge #: 2014 District 42, Versailles	
18	OFFICER	07/01/2020 1800	Dismissed	REASON 1	Charles Livingwell Badge #: 2014 District 42, Versailles Brandon Pangle Badge #: 8888a District 42, Versailles	

From Recent Activities

For your convenience, you can quickly open a list of your upcoming **Court Appearances** from *Recent Activities* on your Home Page.



1. Click on **My Court Appearances** under *Recent Activities*.



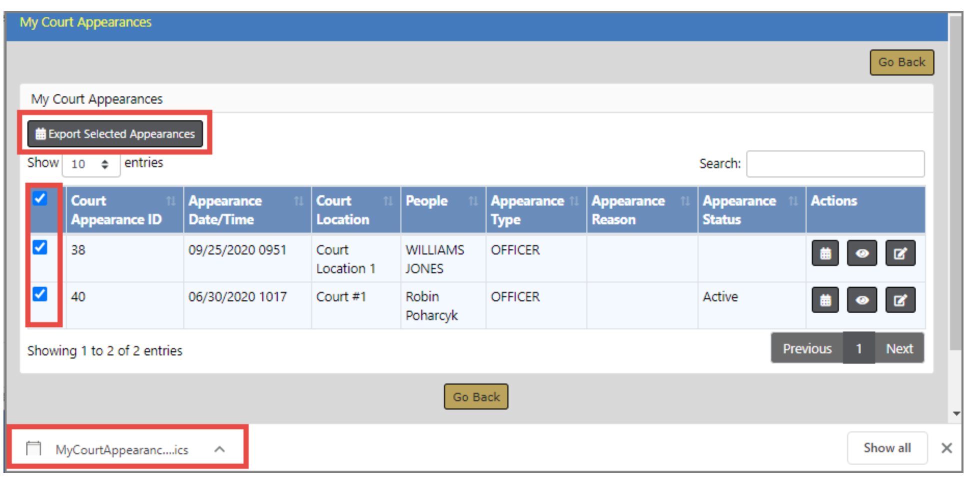
2. Click the View icon  to view the Court Appearance as read-only. For more information on viewing, refer to “View Court Appearances” on page 353.

3. Click the Edit icon  to update the Court Appearance. For more information on updating, refer to “Court Appearances Edit” on page 351.

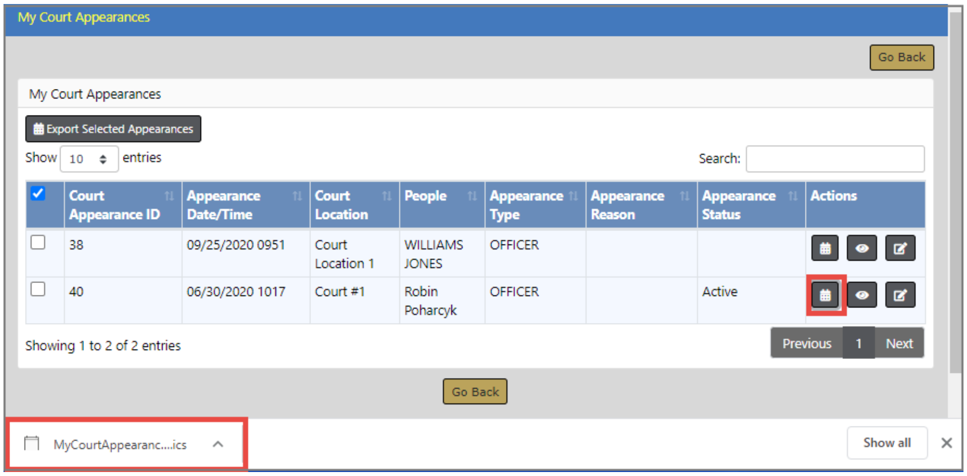
   You must have *Manage Court Appearances* permissions to edit **Court Appearances**.

4. Optionally, add the Court Appearance to your **calendar**. You can add multiple to your calendar at once, or one at a time.

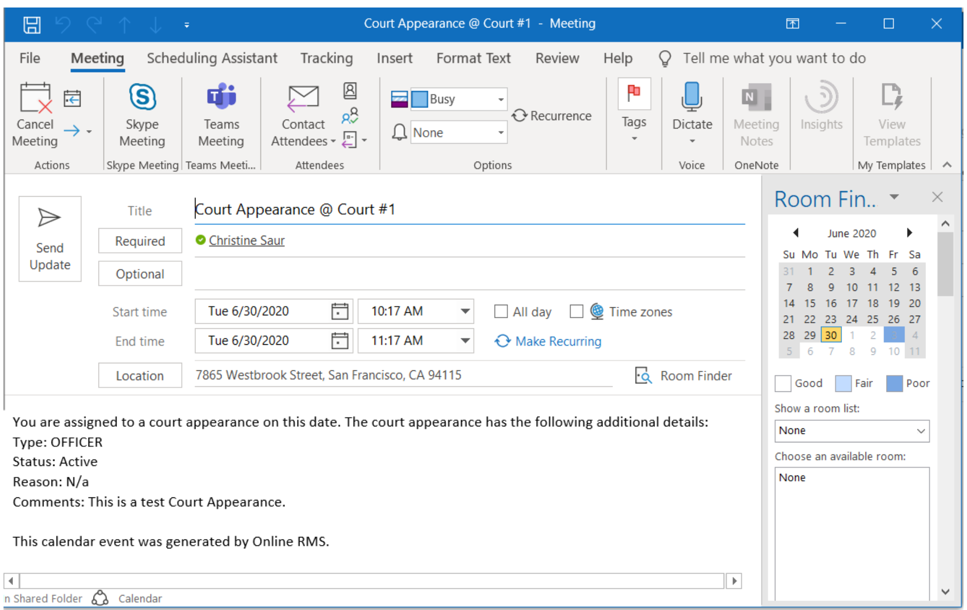
   a. For **multiple** Court Appearances, **check** all that apply, then click **Export Selected Appearances** to download all selected schedules to one ics file.



   OR, for **one** Court Appearance, click the **calendar** button to download an *ics file* for that specific Court Appearance.



b. **Right click** on the downloaded *ics file* to open the meeting notice.



c. Update the notice if needed, then click **Send Update** to add it to your calendar.

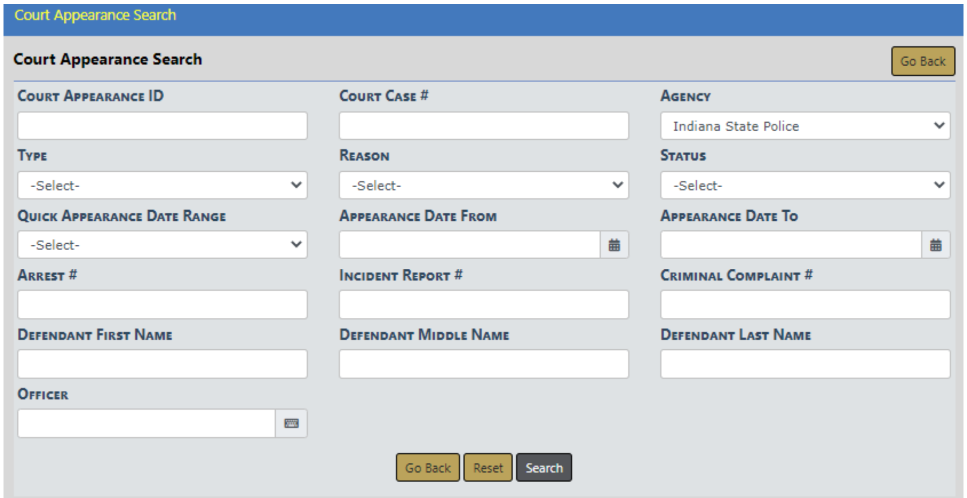
Note: You must remove the notice from your calendar manually once it is added.

Court Appearances Search

To search **Court Appearances** follow these steps:

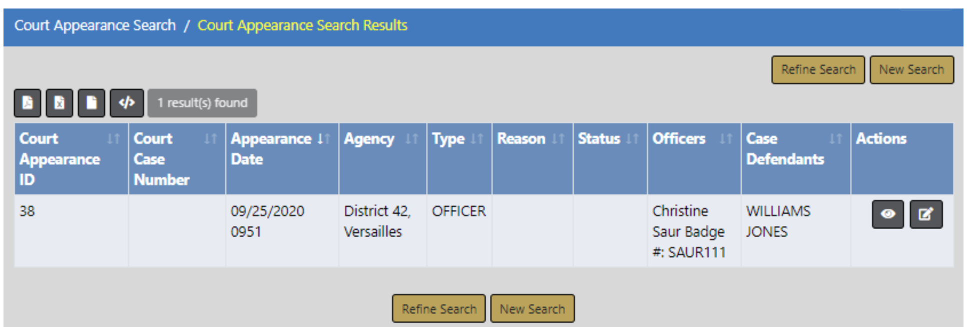
1. On the top menu bar, click **Incidents**, then **Court Appearances**. For instructions, refer to “Court Appearances Overview” on page 345.

2. A *Court Appearance Search* window appears.



3. Enter the search **criteria** into the fields provided. The more criteria you use, the shorter the results list.

4. Click the **Search** button to display the search results.



You can, with appropriate permissions, view or edit **Court Appearance** records from the results window.

- Click on the **View icon** to view. For more information on viewing, refer to "View Court Appearances" on page 353.

- Click on the **Edit icon** to edit. For more information on editing, refer to "Court Appearances Edit" on page 351.

Court Appearances Add

Court Appearances are associated to Court Cases.

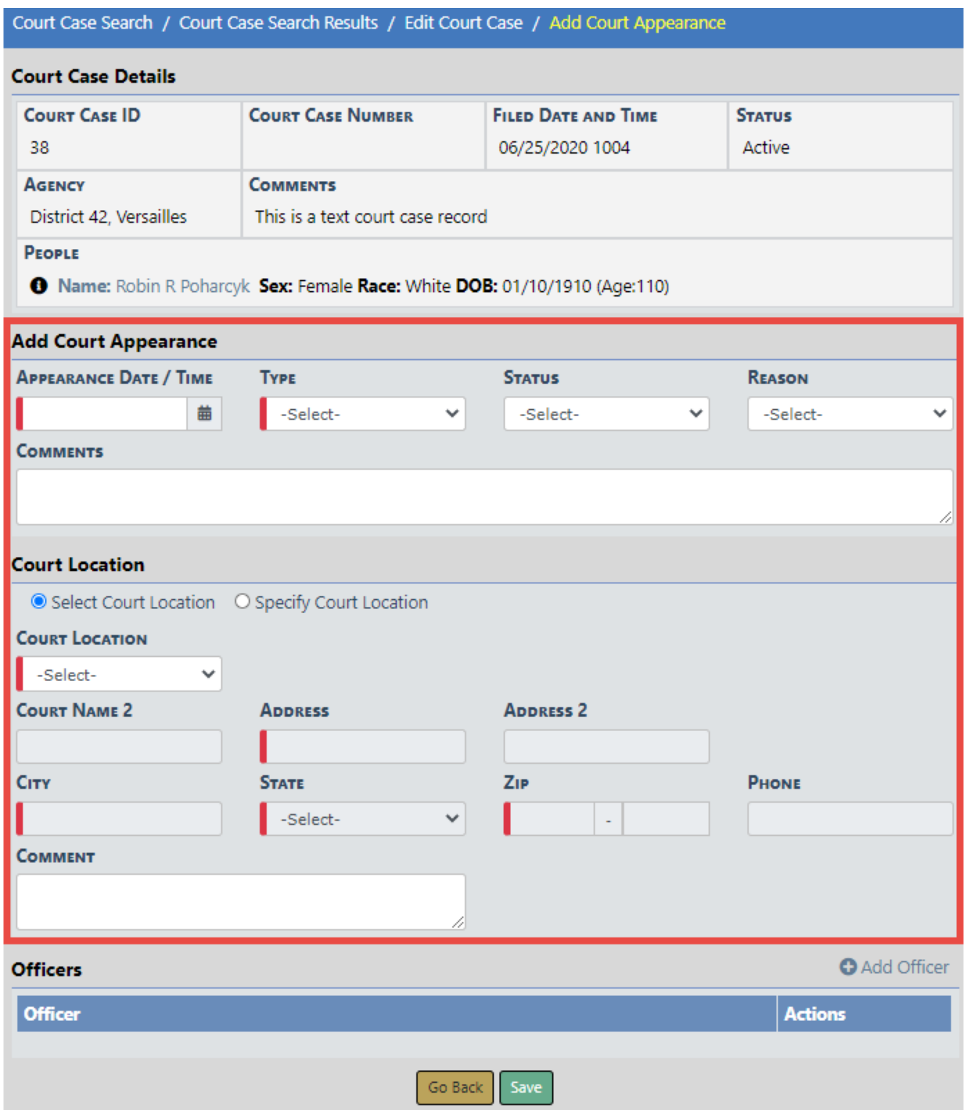
To add a **Court Appearance** to a Court Case, follow these steps:

1. Access the standalone Court Case module. For instructions, refer to “Court Case Overview” on page 333.

2. The *Court Case Search* screen appears. Search for and select the appropriate Court Case record. For instructions on how to search refer to “Court Case Search” on page 334 .

3. On the Court Case record, page down to the Court Appearances section, then click **Add Court Appearance**.

4. The Court Case opens in edit mode, with an *Add Court Appearance* section.



5. Enter the appearance **Date/Time** and **Type**

6. Optionally, select the **Status** and **Reason**, and enter **Comments**.

7. For the **Court Location**, choose one of the following:

   a. **Select Court Location** - to choose a court location from a drop down list. The address populates automatically for you. This option is selected by default.

   b. **Specify Court Location** - to manually enter the address.

8. Optionally, enter a **Comment** for the Court Location.

9. Click the **Add Officer** link to add at least one officer. Either a list of officers on the Court Case appears from which you choose, or you can enter an officer, whichever applies.

10. Click **Save** to save the Court Appearance to the Court Case.

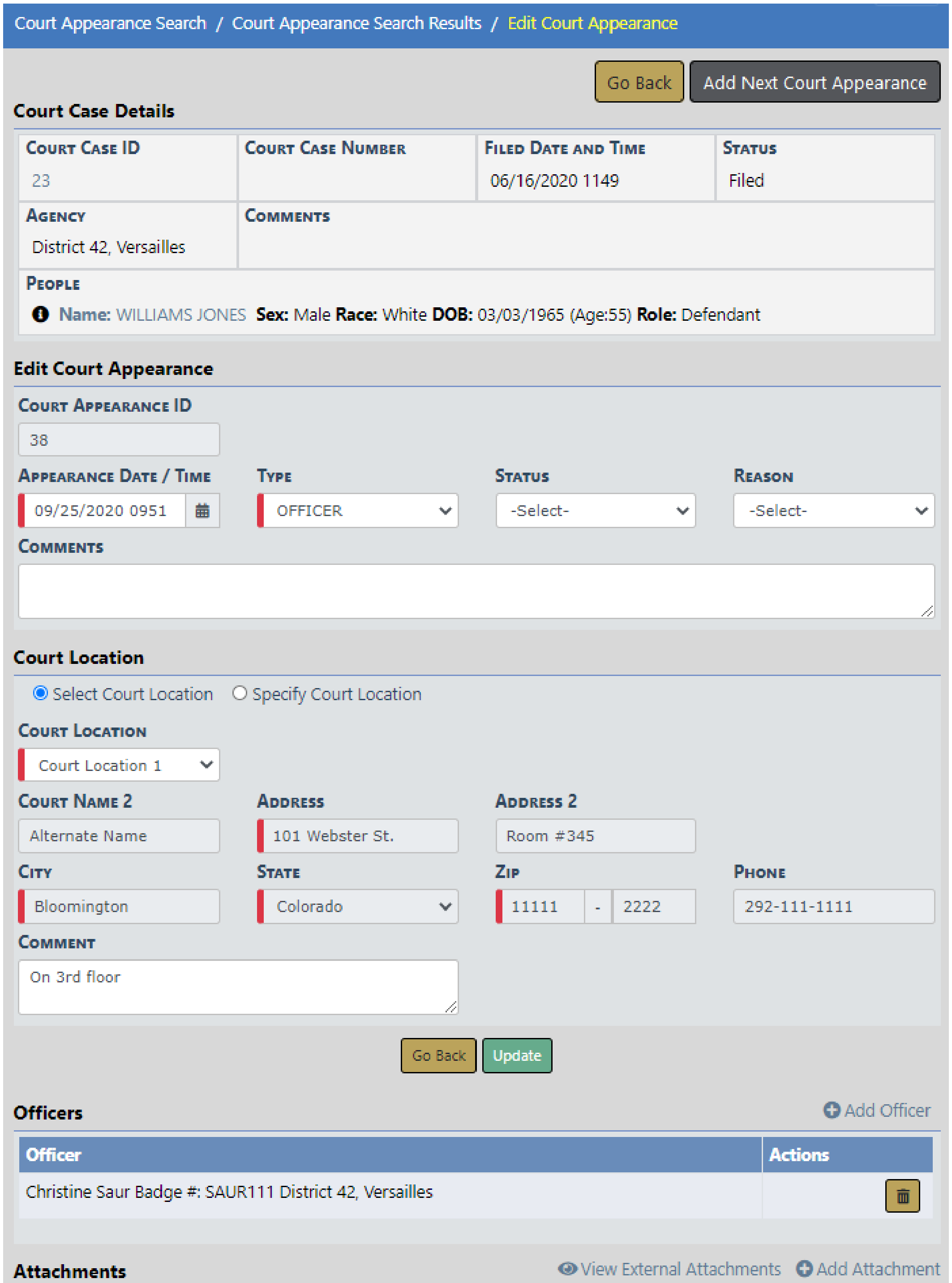
Court Appearances Edit

You must have *Manage Court Appearances* permissions to edit **Court Appearances**.

To edit a **Court Appearance**, follow these steps:

1. Search for the Court Appearances record, from the Court Appearances standalone module or from the Court Case. For more information, refer to “Court Appearances Overview” on page 345.

2. Click on the Edit icon  to open the *Edit Court Appearance* form, with the Court Case Details shown at the top as read-only.



3. Make any necessary changes in the fields provided. For more information on the available fields, refer to “Court Appearances Add” on page 349.

4. Click the **Update** button to apply your changes.

5. Optionally, click the **Add Officer** link to add an officer, then click **Save**.

6. Optionally, **Add Attachments**.

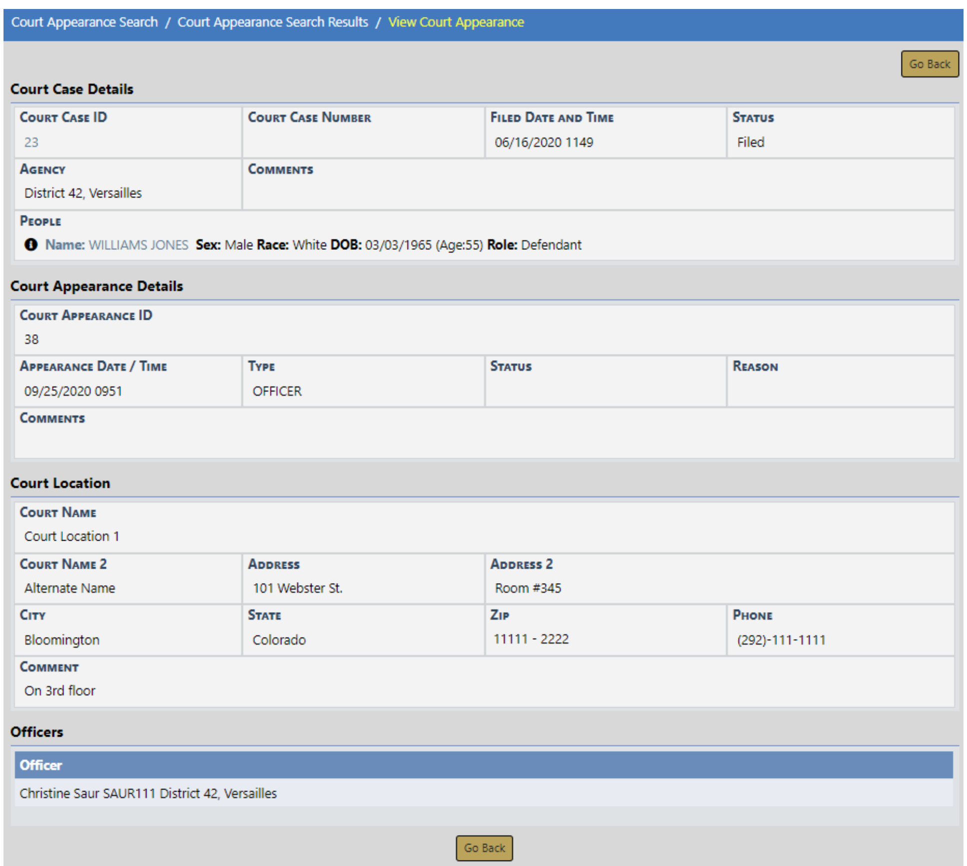
7. Optionally, click the **Add Next Court Appearance** button on the top right of the form to schedule the next court appearance.

View Court Appearances

To view a **Court Appearance** as read-only, follow these steps:

1. Search for the Court Appearances record, from the standalone module or from the Court Case. For more information, refer to "Court Appearances Overview" on page 345.

2. Click on the **View** icon to open the *View Court Appearance* form, with the Court Case Details shown at the top.



Court Appearance Search / Court Appearance Search Results / View Court Appearance

Go Back

Court Case Details

Court Case ID	Court Case Number	Filed Date and Time	Status
23		06/16/2020 1149	Filed

Agency: District 42, Versailles

Comments:

People: Name: WILLIAMS JONES Sex: Male Race: White DOB: 03/03/1965 (Age:55) Role: Defendant

Court Appearance Details

Court Appearance ID: 38

Appearance Date / Time	Type	Status	Reason
09/25/2020 0951	OFFICER		

Comments:

Court Location

Court Name: Court Location 1

Court Name 2	Address	Address 2	
Alternate Name	101 Webster St.	Room #345	

City	State	Zip	Phone
Bloomington	Colorado	11111 - 2222	(292)-111-1111

Comment: On 3rd floor

Officers

Officer
Christine Saur SAUR111 District 42, Versailles

Go Back

Changes cannot be made to the data on this form while in view mode. For instructions on updating the data, refer to "Court Appearances Edit" on page 351.

Chapter 19. Field Arrest

Field Arrest Overview

The **Field Arrest** module can be used to document the necessary information associated with an arrest. Once you select a person from the **Master Indices** or create a new person record, you can edit the **Field Arrest** information. The **Field Arrest** can stand alone or it can be associated to an Incident Report.

Beginning with Online RMS 11.4.0, you can add a **Criminal Complaint** associated to a **Field Arrest**, providing you have the appropriate permissions and the feature is turned on.

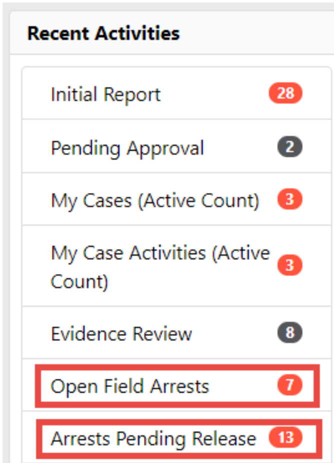
Hunter Camera integration allows Online RMS to send a message to a virtual camera on our local machine, then receive pictures back and post to the Online RMS *Master Person Index* record.

Livescan integration transmits the most recent arrest and arrestee information from the *Master Person Index* to **LiveScan**.

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

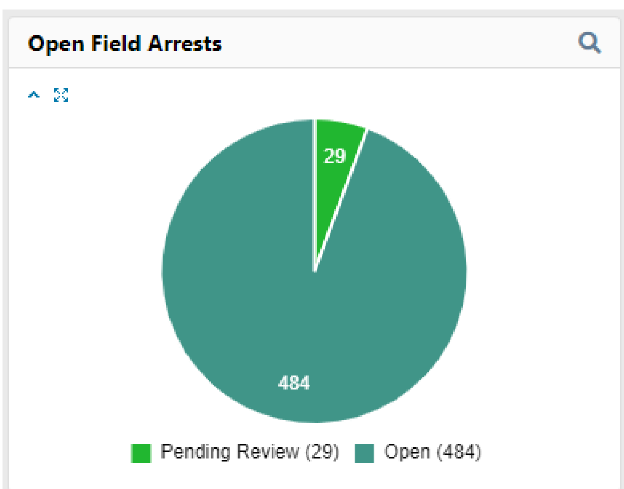
Recent Activities

Certain **Field Arrest** links appear under Recent Activities on your Home page. The below example shows two examples.

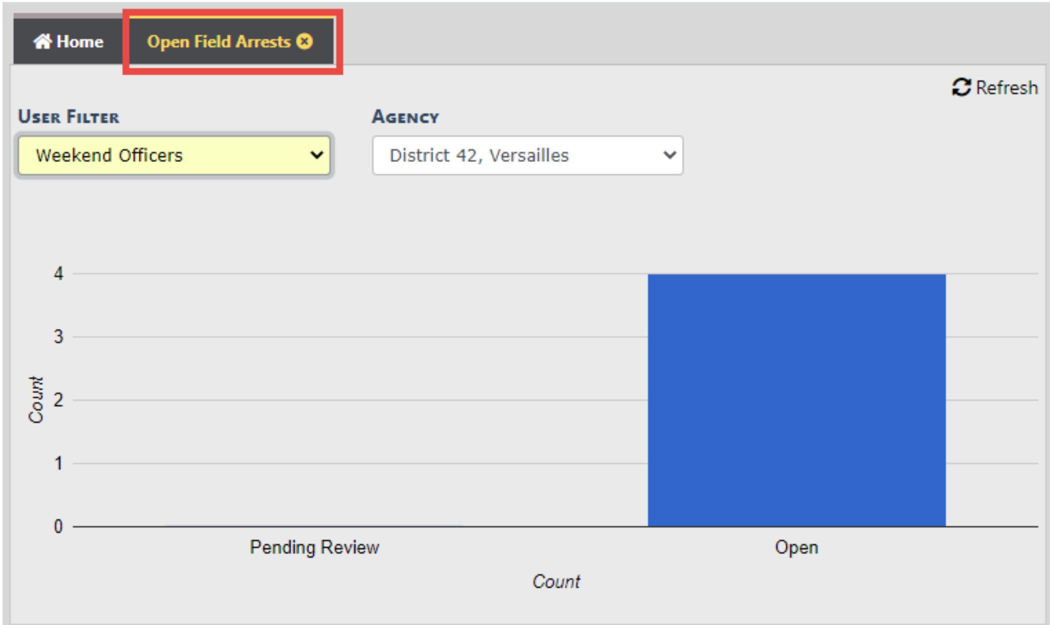


For more information about Recent Activities, refer to "Home Page - Prior to RMS 11.12" on page 8.

With proper permissions you can also view a Field Arrest Chart on your Home Page that shows a count of those that are open and pending review. Refer to "User Information Menu" on page 45 for information on adding the Field Arrest Chart to your Home Page.

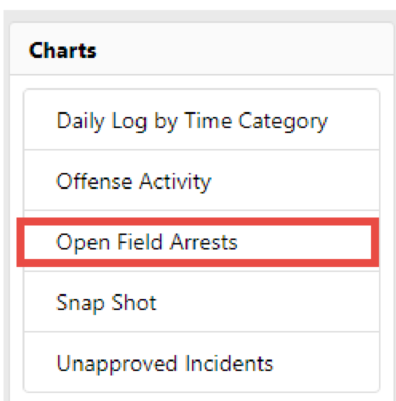


Click on the magnifying glass on the upper right of the pie chart to open the static bar chart as a separate tab.



You can move between your Home Page and the chart by clicking on the associated tab, allowing you to keep the Open Field Arrests tab open until you close it.

Note: You can also open the static bar chart as a separate tab by clicking on **Open Field Arrests** under the *Charts* section of your Home Page.



Click **Refresh** to include the most current data since you've last opened the chart.

Click on the **X** to close the tab.

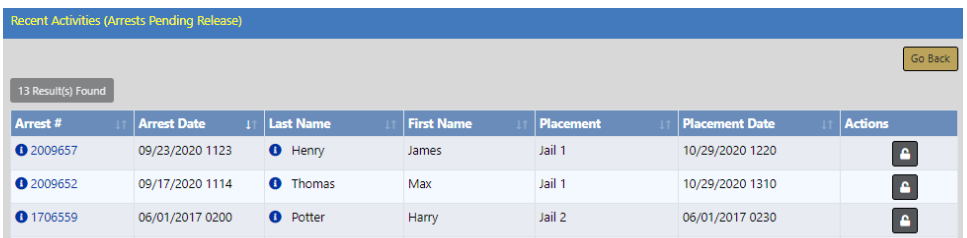
Open Field Arrests

Click on the link to view a list of arrests that are open. You can then edit a **Field Arrest** that appears on the list.

Field Arrests Pending Release

Agencies using Field Arrests and having a **Disposition** configured with a **Status Code** of *Complete Without Release*, displays an **Arrests Pending Release** link under Recent Activities.

Click on the link to view a list of arrests that are pending release.



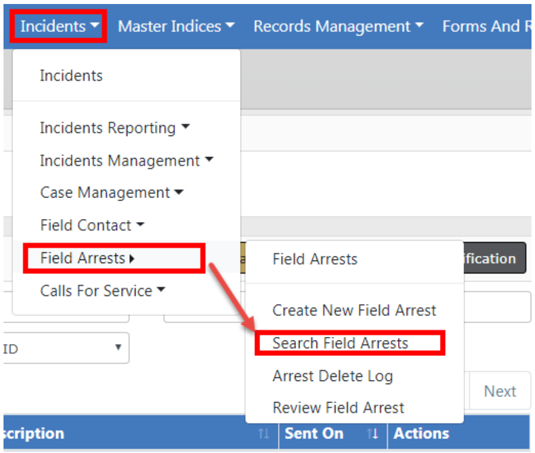
Click on the release icon  on the right to release the Field Arrest to open the *Release Field Arrest* form.

On the *Release Field Arrest* form, change the **Disposition** to *Released*, then click the **Update Disposition** button.

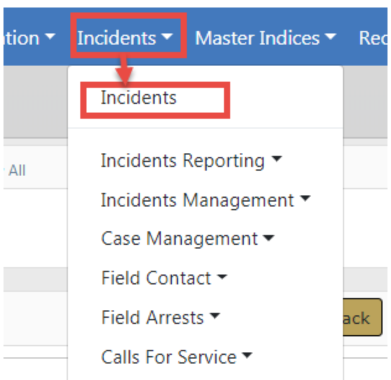
Search Field Arrests

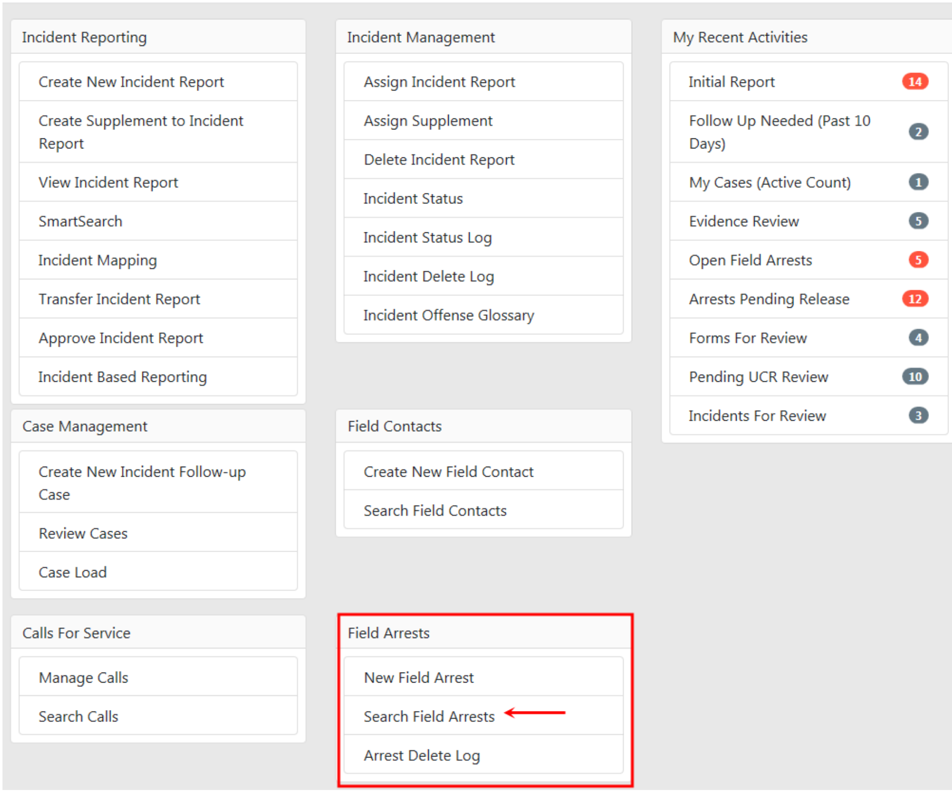
To view or edit an existing **Field Arrest** you must first **Search** for the record. There are two ways to search, either method will open the *Search Field Arrests* screen:

- Click on the **Incidents** drop-down menu on the top *Navigation Bar*, click on **Field Arrests**, then **Search Field Arrests**.

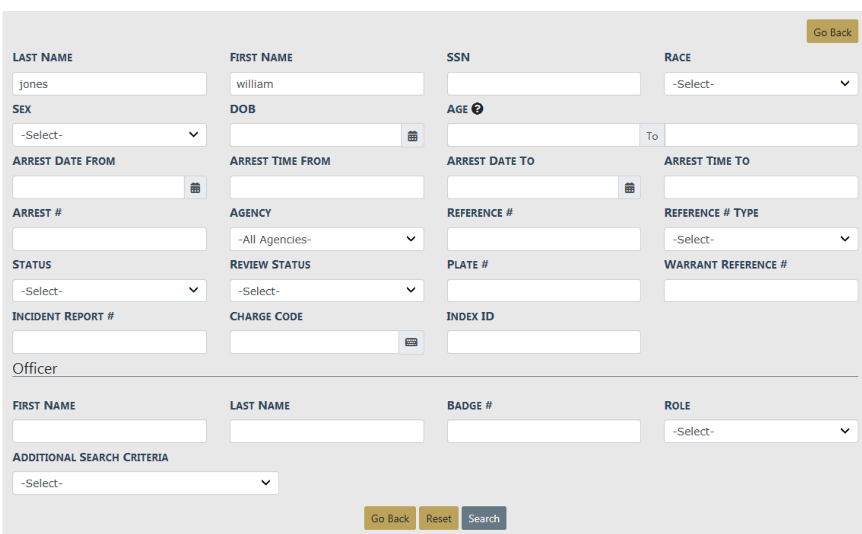


- Or, click the **Incidents** label on the top Navigation Bar, click Incident on the sub-menu, then click the **Search Field Arrests** link.





After choosing one of the two search methods, the *Field Arrest Search* screen appears. Enter the search criteria then click **Search** to display the *Search Results*. Click the **Reset** button to clear the entered criteria if you wish to start over.



From the *Search Results* window, you have the ability to export the search results to various file types using the four icons directly above the *Search Results* grid. For more information on exporting search results refer to "Export Search Results" on page 36.

Click the **Arrest Number** link to view the *Field Arrest*, click the **Edit** icon to update the *Field Arrest*, or click the **Delete** icon to delete.

For more information on editing the **Field Arrest** refer to FieldArrestEdit.htm.

For more information on deleting a **Field Arrest** refer to "Delete Field Arrest" on page 400.

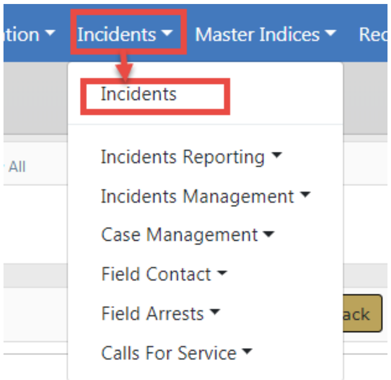
Note: The **Edit** and **Delete** icons are available if you have proper permissions to perform that action. Refer to your administrator for more information on permissions.

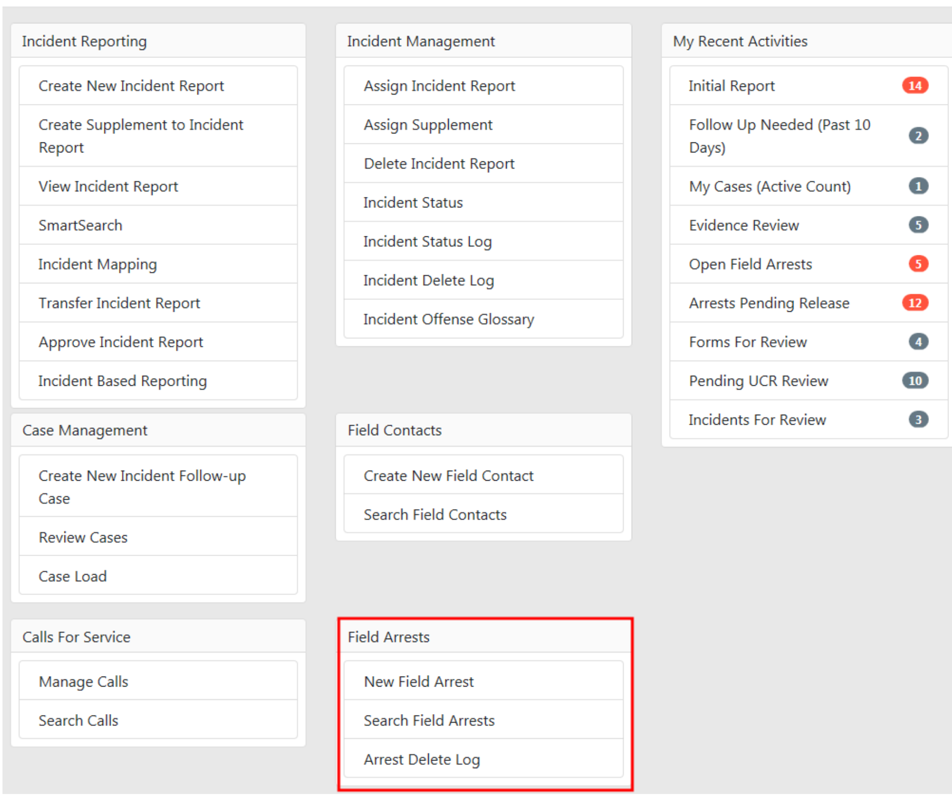
Note: A column for *Age of Arrestee* also appears in the search results, while *Arrest Number* has been updated to *Booking/Arrest #*.

Click the **Refine Search** button to return to the *Field Arrest Search* form to update the criteria you initially entered, or click **New Search** to enter new criteria.

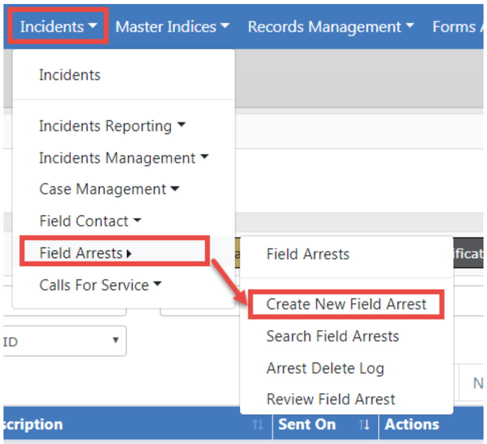
Create Field Arrest Manually

To create a new **Field Arrest** manually, select *New Field Arrest* from either the Incidents menu or the Incident drop-down on the top Navigation Bar.


tion
Incidents
Master Indices
Rec
Incidents
All
Incidents Reporting
Incidents Management
Case Management
Field Contact
Field Arrests
Calls For Service
ack

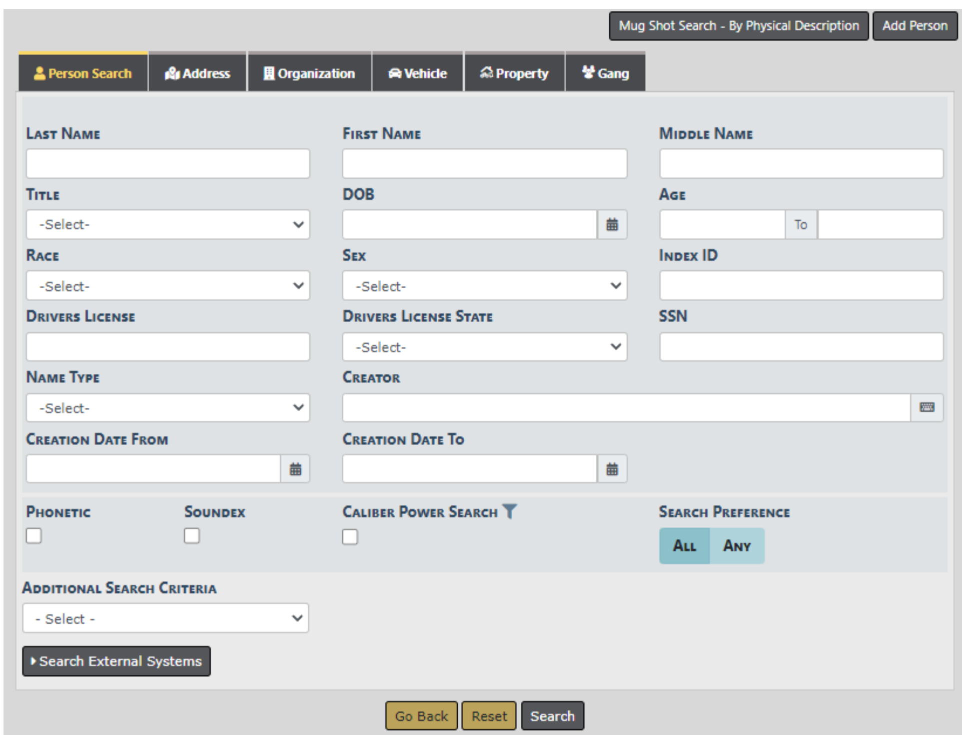

Incident Reporting
Create New Incident Report
Create Supplement to Incident Report
View Incident Report
SmartSearch
Incident Mapping
Transfer Incident Report
Approve Incident Report
Incident Based Reporting
Incident Management
Assign Incident Report
Assign Supplement
Delete Incident Report
Incident Status
Incident Status Log
Incident Delete Log
Incident Offense Glossary
My Recent Activities
Initial Report 14
Follow Up Needed (Past 10 Days) 2
My Cases (Active Count) 1
Evidence Review 5
Open Field Arrests 5
Arrests Pending Release 12
Forms For Review 4
Pending UCR Review 10
Incidents For Review 3
Case Management
Create New Incident Follow-up Case
Review Cases
Case Load
Field Contacts
Create New Field Contact
Search Field Contacts
Calls For Service
Manage Calls
Search Calls
Field Arrests
New Field Arrest
Search Field Arrests
Arrest Delete Log

OR



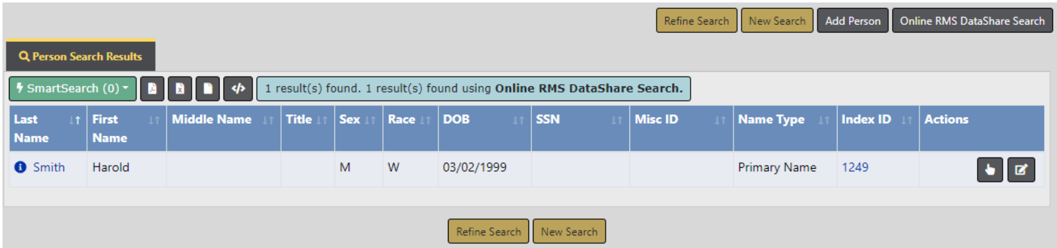
Note: You can also create a Field Arrest from an Incident and import the Incident data. For details, refer to "Create Field Arrest from Incident" on page 267.

1. The **Person Search** screen opens. This searches through the *Master Person Index* records to locate existing records that match your entered criteria.



2. Search for the person or use the **Add Person** button on the upper right to add the person.

3. Once the *Person Search Results* screen appears, use the Select icon to select the correct person.



From the *Person Search Results* window, you have the ability to export the search results to various file types using the four icons directly below the *Search Results* tab.

For more information on exporting search results refer to "Export Search Results" on page 36.

For more information on searching *Master Person Index* records, refer to "Master Indices" on page 83.

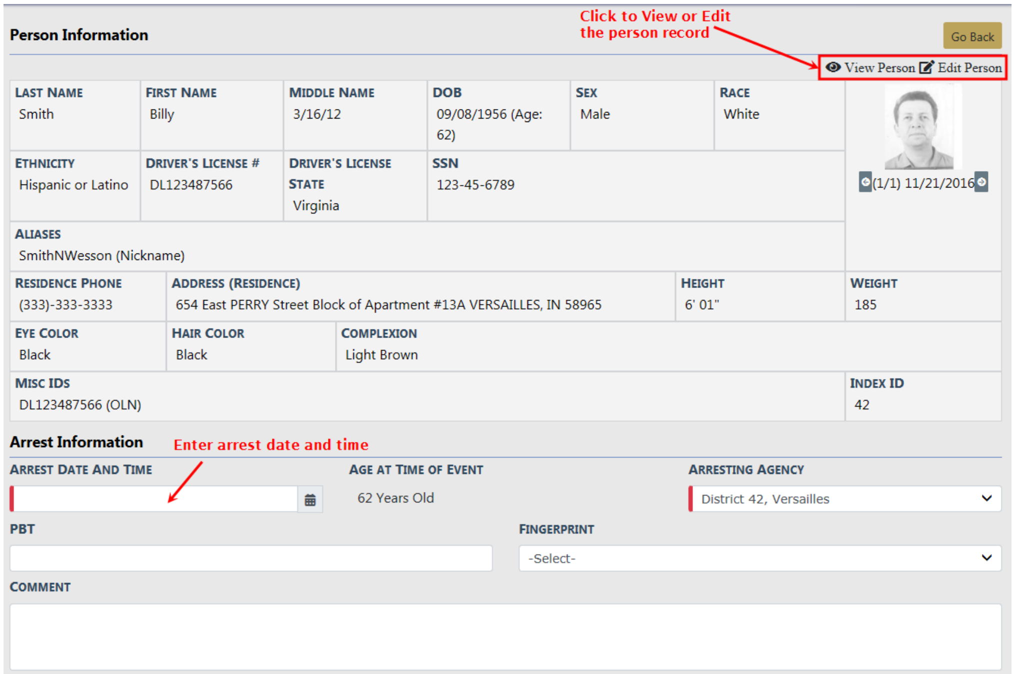
4. If the person **is associated** to existing Incident or Calls for Service records, the *Field Arrest Quick Booking* screen appears, otherwise skip this step.

- Offender information and photo, if available, appears on the left of the screen.
- This screen allows you to optionally import data from either an Incident or Calls for Service record, or create an Arrest without importing data. To Import Incident or Call for Service data, refer to "Create Field Arrest and Import Data" on the facing page.

a. Click on the **Create Arrest Without Importing** button to create the Field Arrest manually.

b. Proceed to the next step.

5. The *Add Field Arrest* screen opens.



a. Verify the information under *Person Information* to be accurate. Enter the **Arrest Date** and **Time**, **PBT**, and **Comments**.

b. Click the **Edit Person** link to add or update person information if needed.

- Click the **Save** button after updates are complete to return to the *Add Field Arrest* screen.

c. Click the **Save** button on the *Add Field Arrest* screen to save the entered data.

6. The *Edit Field Arrest* screen opens.

For more information on editing a Field Arrest, refer to "Edit Field Arrest" on page 370.

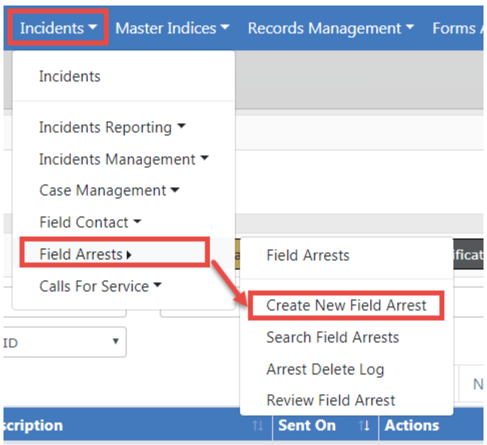
Create Field Arrest and Import Data

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

Follow these steps to create a Field Arrest and import the data:

1. Initiate a new Field Arrest from the Incident top menu.

Note: If you are creating a Field Arrest from an Incident record, skip to **Step 6**. For more information on creating an arrest form an Incident, refer to "Create Field Arrest from Incident" on page 267.



2. Search for and select the person.

   For more details on searching and selecting the person, refer to the first few steps of "Create Field Arrest Manually" on page 361.

3. If the person you select **is associated** with existing Incident or Calls for Service records, the *Field Arrest Quick Booking* screen appears.

- Offender information and photo, if available, appears on the left of the screen.
- This screen allows you to optionally import data from either an Incident or Calls for Service record, or create an Arrest without importing data. To create an Arrest without importing, refer to "Create Field Arrest Manually" on page 361.

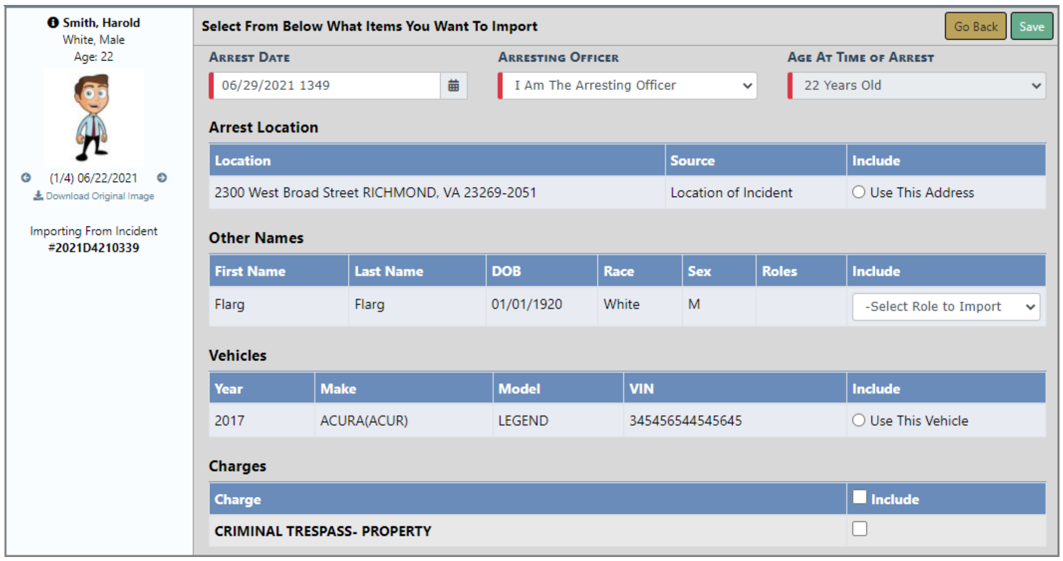
   If the person you select is **not associated** with existing Incident or Calls for Service records, the *Add Field Arrest* screen opens rather than the above. You must manually enter Field Arrest data. For instructions, begin with the *Add Field Arrest* section of "Create Field Arrest Manually" on page 361.

4. Select either **Quick Arrest From Incident** or **Quick Arrest From Call For Service**.

   The data that displays in the grid changes based on your selection.

- The grid displays the Incidents or Calls for Service records to which this person belongs, and only those records that you have permissions to see within your organization.
- If you select Incident, and do not have permissions to access an Incident Supplement to which the offender is associated, that Incident does not appear in the grid.

5. Select the appropriate record in the grid to import.
6. The *Import and Create Field Arrest* screen appears.



- The person's name and other information appear on the left along with a photo, if one exists.
- The data source appears under the person's photo:
  - *Importing from Incident* or *Importing from Dispatch*.
  - The Incident or Dispatch number.
- People and Addresses:
  - If importing data from an Incident, the people and addresses have Master Person and Address Indices records.
  - Calls for Service people and addresses may not have Master Person and Address Indices records; however, you are given the option to create them.
- The fields prepopulate with Information from the data source automatically; however, you can make any necessary changes.

7. The **Arrest Date** defaults to today's date. Click into the field and select another date if needed.

8. The **Arresting Officer** defaults to the logged in user. Other officers defined in the data source also appear on the list. To change to another officer, click into the field and select the appropriate officer from the list.

9. **Age at Time of Arrest** is calculated for you based on the offender's birth date. This field is read-only.

10. Locations defined in the data source are listed under **Arrest Location**. If multiple locations exits in the data source, they all appear here.

    Incident and Calls for Service location data are handled differently during the import process:

    - Incident Locations are Master Address Index records. Click **Use This Address** to choose a location.

    - Calls for Service Locations may not be Master Address Index records. If not, the **Create Address** button appears.

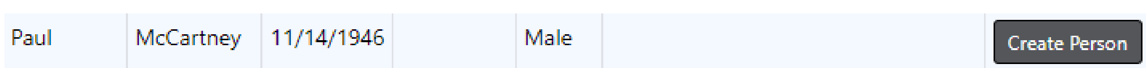
      

      Click the **Create Address** button to create the Master Address Index record, then the button changes to **Use This Address**.

11. **Other Names** and **Victim Names** also appear on this screen, depending on whether or not they exist in the data source. The example used only shows **Other Names**.

    - On each name, click the drop-down box to select which **Role to Import**.

    - When importing CFS data, the **Create Person** button appears if the person is not a Master Person Index record. Click the button to create the Master Person Index record, then you can select the **Role to Import**.

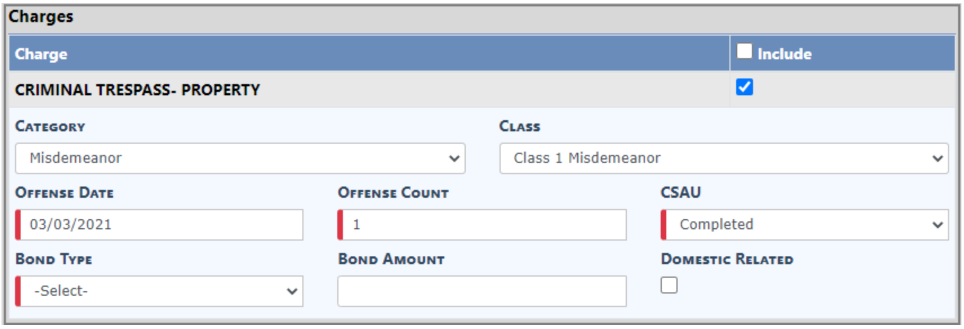
      

      - When creating a new person, the import process also updates the CFS event person record with the Master Person Index.

12. Select the **Vehicle**, if applicable.

13. Select the **Charge**, if applicable.

    Additional fields appear.



a. Arrest charges have bond fields that the Incident doesn't.

b. Select the **Bond Type** and enter the **Bond Amount**.

c. Update other fields as needed.

14. Click **Save**.

15. Incidents only:

If you are importing Incident data outside of an Incident and *you have* an existing open Supplement:

a. The process creates the Field Arrest.

b. The process associates the Field Arrest to the open Supplement and the role of *Arrestee* is added to the offender.

OR

If you are importing Incident data outside of an Incident and *you do not* have an existing open Supplement:

a. A prompt appears asking if you want to create a Supplement.

- If **Yes**, then the process creates the Field Arrest, associates it within the Supplement, and adds the role of *Arrestee* to the offender.

- If **No**, then the process associates the Field Arrest to whatever Supplement the offender was added, and the role *Arrestee* is *not added* to the offender.

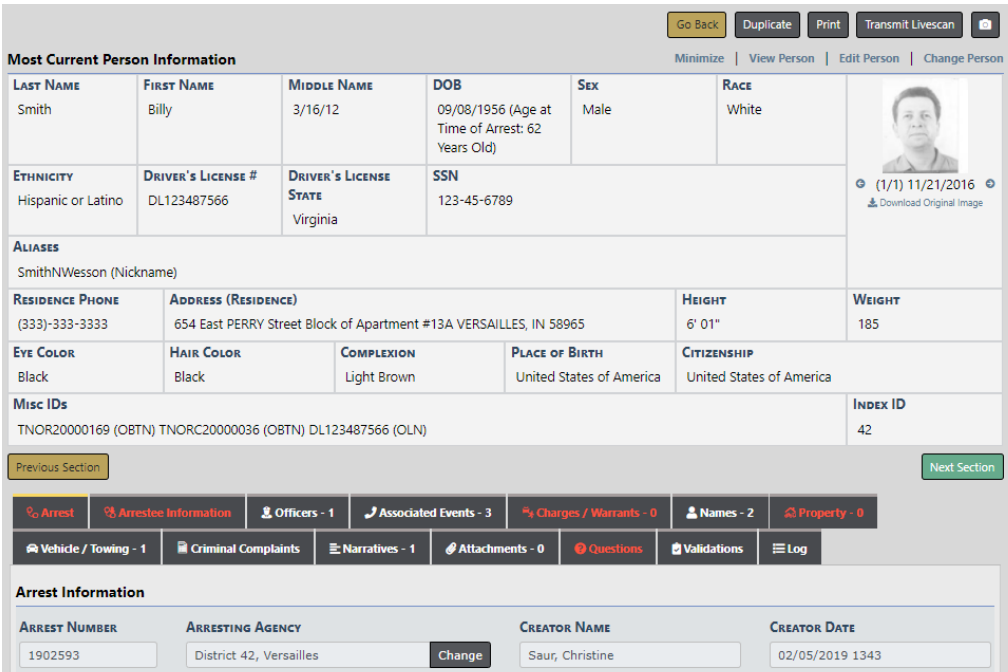
16. The *Edit Field Arrest* screen opens.

17. Make any necessary changes to the Field Arrest record.

For more information on editing a Field Arrest, refer to "Edit Field Arrest" on the next page.

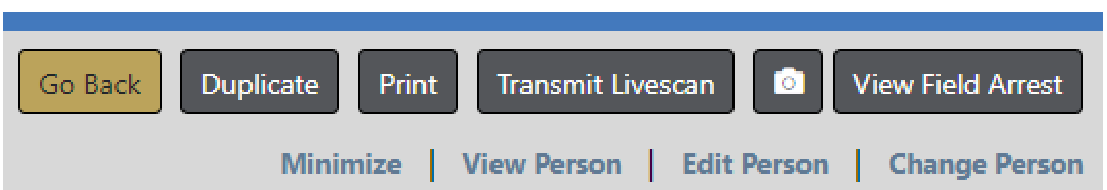
Edit Field Arrest

The *Edit Field Arrest* screens allows you to enter details of the **Field Arrest**.



There are action buttons on the top right of the *Edit Field Arrest* screen.

Note: Certain buttons may not be visible, depending on your agency's configuration.



- **Go back** - Return to the previous screen.
- **Duplicate** - Duplicate the Arrest record for each Arrestee systematically to avoid duplicate manual entry.

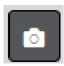
  For more information, refer to “Duplicate Field Arrest” on page 397.
- **Print** - After the **Field Arrest** form is complete, you can print a *Field Arrest Report* from this page.

  For details, refer to “Print Field Arrest” on page 402.

- **Transmit Livescan** - After the Arrest record is complete, transmit the most recent physical description and the person images associated with that physical description to LiveScan.

  For details on using the LiveScan software, refer to “LiveScan” on page 847.

- **Camera** - After the Arrest record is complete, take a photo using *Hunter Camera*. Depending on your agency's configuration, there may be one or multiple cameras from which to choose.

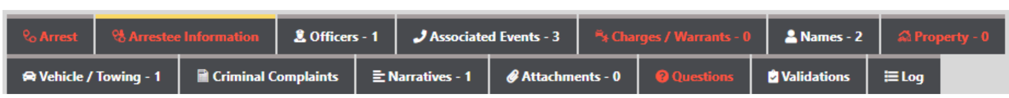
  One: 

  Multiple: 

  For details on using the camera software, refer to “Hunter Camera” on page 844.

- **View Field Arrest** - Allows the user to toggle back and forth between viewing the field arrest and editing the field arrest.

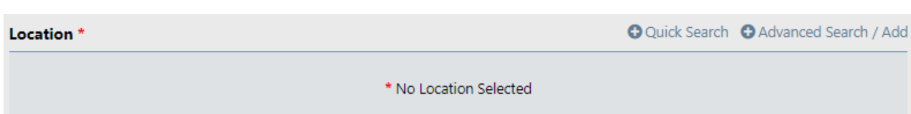
Individual tabs located in the center of the *Edit Field Arrest* screen organize the **Field Arrest** details.



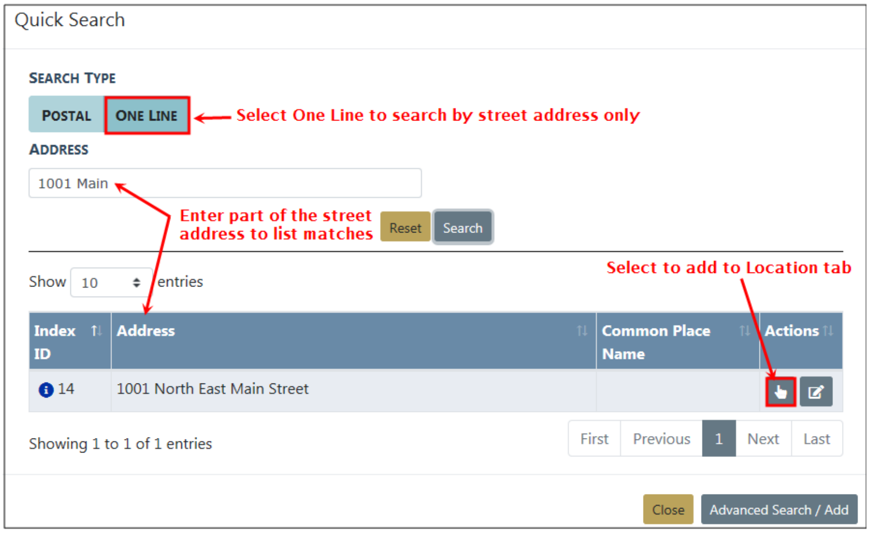
You may wish to minimize the *Person Information* box so it is easier to go through your report. Do this by selecting **Minimize** at the top of the screen.

1. If you haven't already, add the **Location**. The location pulls from the **Master Address Index**. The recommendation is to always search for an existing Master Address record before adding a new one to prevent duplicates. The Location is required.

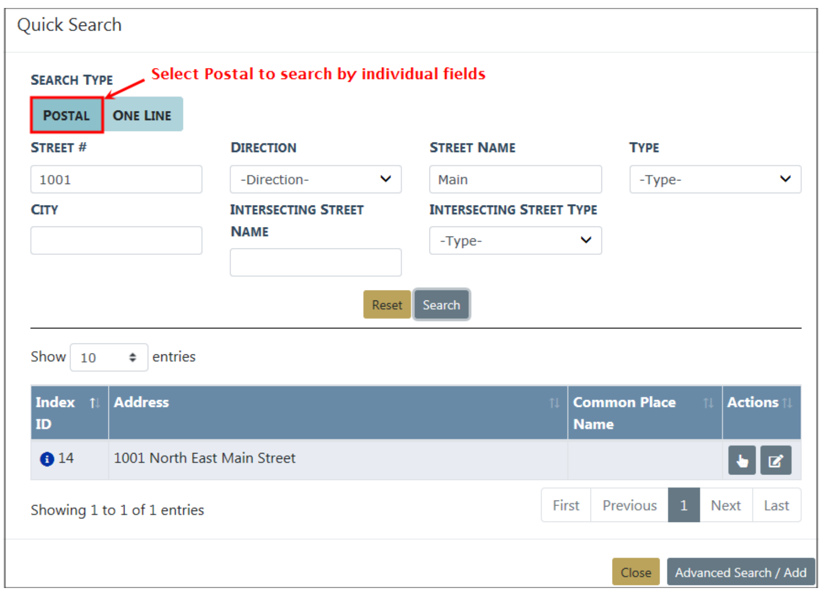
   a. Click the **Quick Search** link to open the *Quick Search* window.

   You have the option to search by the street address only, or by separate fields that make up an address such as street number, street name, city, etc.



OR



Note: If the **Location** you are looking for does not exist, click the **Advanced Search/Add** button to add it to the **Master Address Index**. For more information on adding a Master Address index record, refer to "Master Indices" on page 83.

b. Click the Select icon to select the **Location** you want to add.

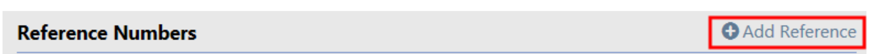
c. Only one location is associated to an arrest record. When you select a location, the **Quick Search** and **Advanced Search/Add** buttons change to view, edit, and remove location:

d. Click the **View Location** button to view details of that address.

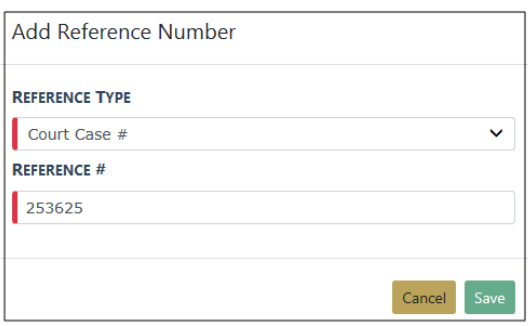
e. Click **Edit Location** to change the address data, or click **Remove Location** to remove the location from the arrest record.

2. Give the field arrest a **Disposition**: Based on what is selected, there are additional boxes that need to be completed as shown in the example below:

3. Click the **Add Reference** link to add a Reference Number in the *Add Reference Number* window if applicable.



4. Enter the appropriate Reference information and click the **Save** button.

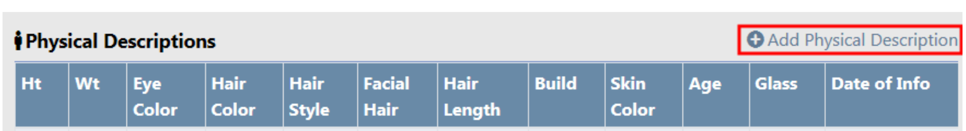


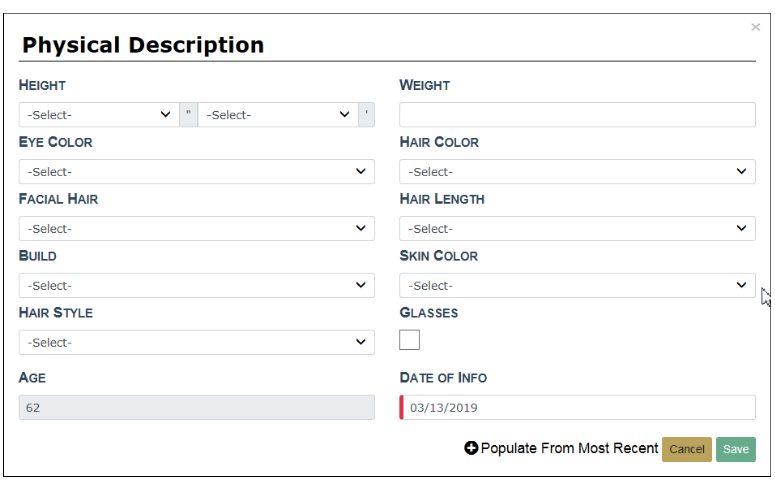
5. Click **Next Section** on the *Edit Field Arrest* screen to navigate to *Arrestee Information* tab, or click on the *Arrestee Information* tab.

Note: Each tab has a **Next Section** link that advances you to the next tab. Or you may click on the individual tabs to navigate between tabs manually.

6. Click on the individual **Add** buttons to enter the necessary *Arrestee Information* in the various sections.

   For example, click on **Add Physical Description** to add the Arrestee's physical description.





a. If arresting a previously known person you can import the existing **Physical Description** from the *Master Person* record. Click on the **Populate From Most Recent** button to populate the data from the most recent *Master Person* record.

b. Update fields as needed.

c. Click **Save**, or click **Cancel** to return to *Edit Field Arrest* screen without adding a **Physical Description**.

d. Continue adding all other necessary information.

Note: **Citizenship** under the **Birth Place** section is required. If **Country** is blank, it defaults to the same value as **Citizenship**. If needed, you can select a different Country than Citizenship.

Note: The **Email/Web Addresses** section supports social media sites, such as Facebook, Twitter, LinkedIn, Instagram, Snapchat, YouTube.

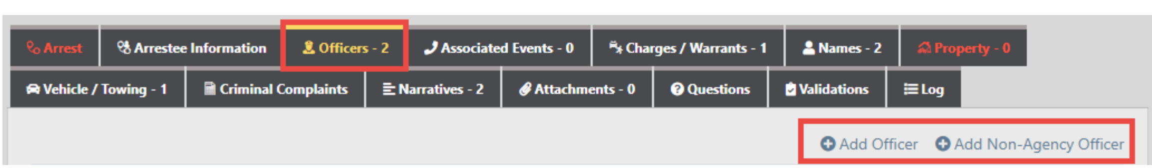
7. If you would like to add multiple addresses, you can click the **Make Most Recent** icon on an existing address to make a duplicate of that address, then make any necessary changes.

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

8. Click **Next Section** on the *Edit Field Arrest* screen, or click on the *Officers* tab.

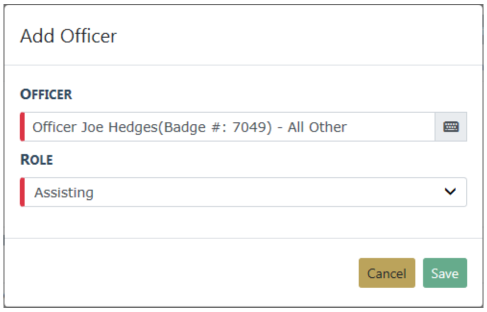
Officer

Ensure the information is correct on the **Officers** tab.



The **Field Arrest** accommodates multiple officers with different roles.

1. Click the **Add Officer** link to add officers to the **Field Arrest**.



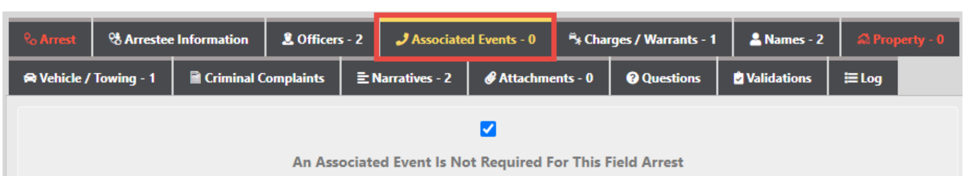
2. Choose the appropriate **Officer** and associated **Role**, then click **Save**.

3. The added officer then appears in the **Officer** tab of the Field Arrest record.

The **Add Non-Agency Officer** link appears for multi-tiered agencies. With the proper permissions assigned by your administrator, this button allows you to assign officers from outside of your agency. For more information see your administrator.

Associated Events

This tab gives you the option to associate an **Incident** or **Calls for Service** to this **Field Arrest**. To waive the option, check the **An Associated Event Is Not Required For This Field Arrest** box.



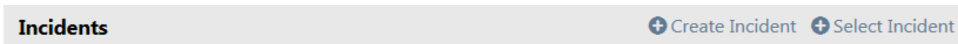
If you want to associate an **Incident** or **Calls for Service**, leave the box unchecked. You can either *create* or *select an existing* **Incident**, or *select an existing* **Call**.

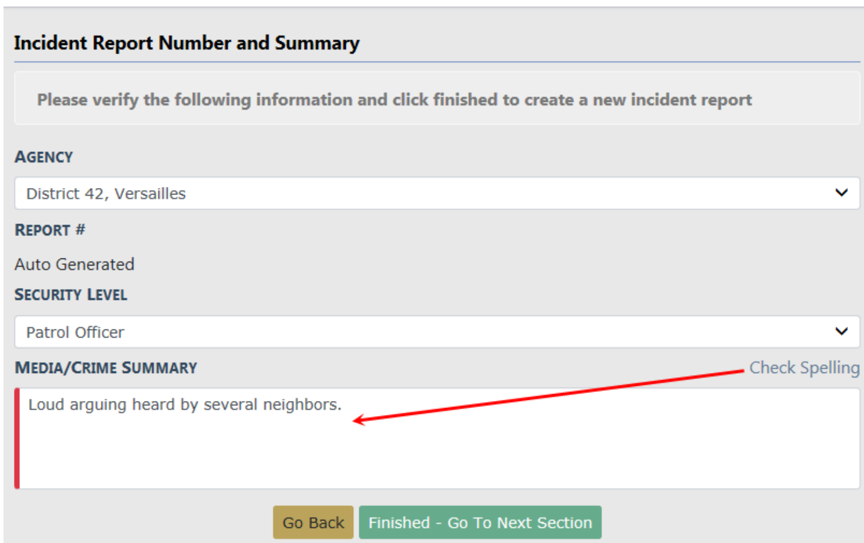
> **Note**: You may assign multiple **Associated Events** to the same **Field Arrest**.

Create Incident

Create Incident only applies if your agency allows the manual creation of incidents.

1. Select the **Create Incident** link to create an **Incident**. The *Incident Report Number and Summary* screen opens.

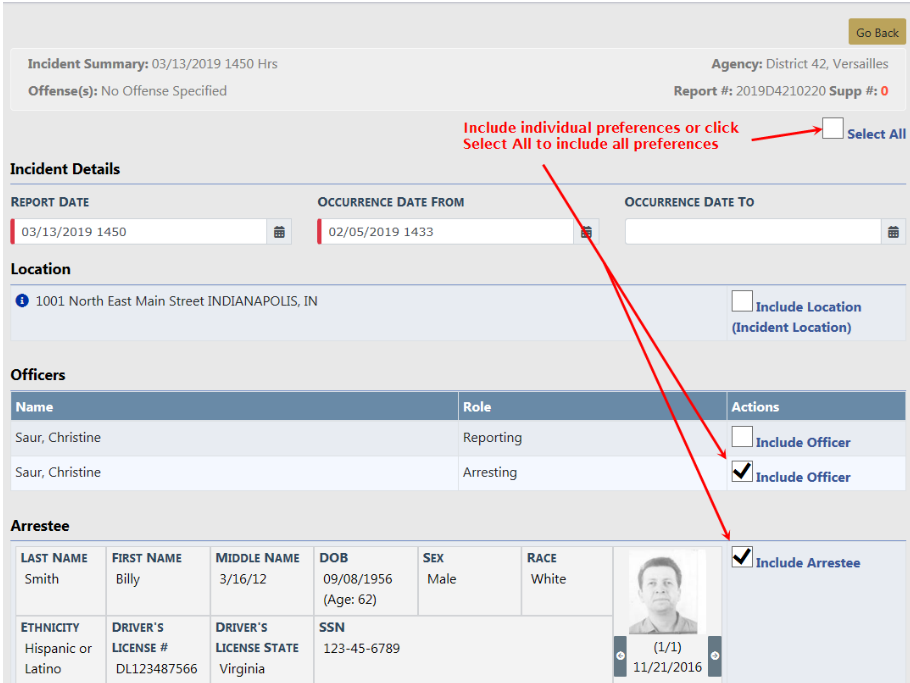




2. Enter the necessary information, then click the **Finished - Go To Next Section** button.

   Note: Click the **Check Spelling** button to check your spelling before going to the next section if you wish.

3. The *Incident Associations* form opens.



4. Select the items on the *Incident Associations* form to include on **Incident Report** from the **Field Arrest**.

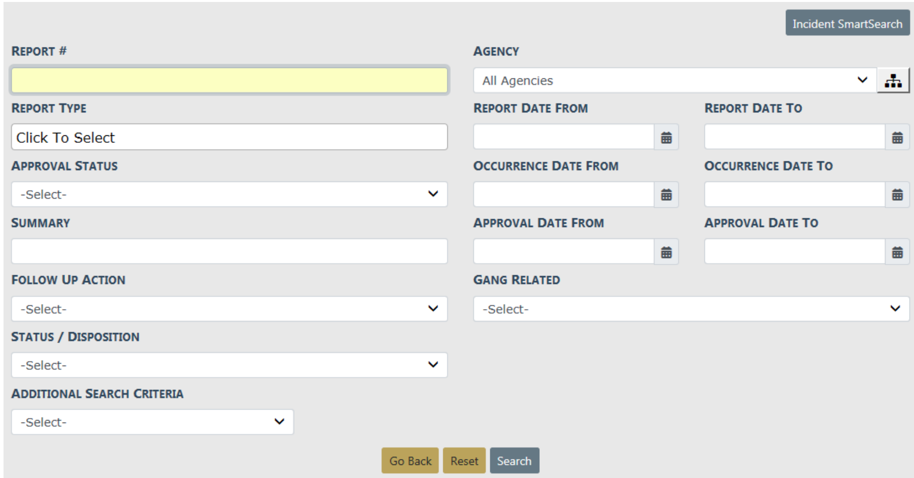
   Note: Additional information can be added to the **Incident Report** later. For more information on **Incident Reports** refer to "Incidents" on page 189.

5. Click the **Save** button at the bottom of the screen.

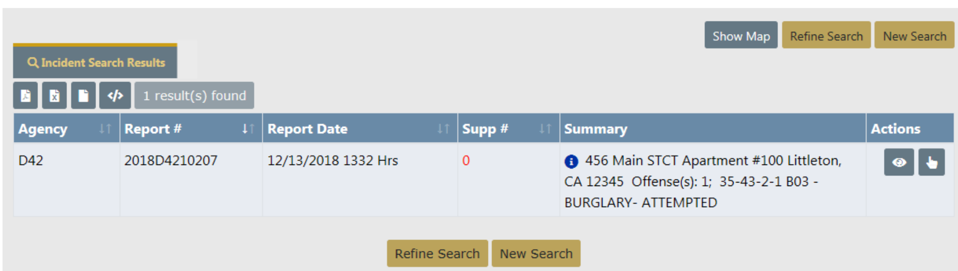
6. The associated **Incident** appears in the **Associated Events** tab of the *Edit Field Arrest* screen.

Select Existing Incident

1. Select the **Select Incident** link to associate an existing **Incident** to the **Field Arrest**. The *Incident Search* screen opens.



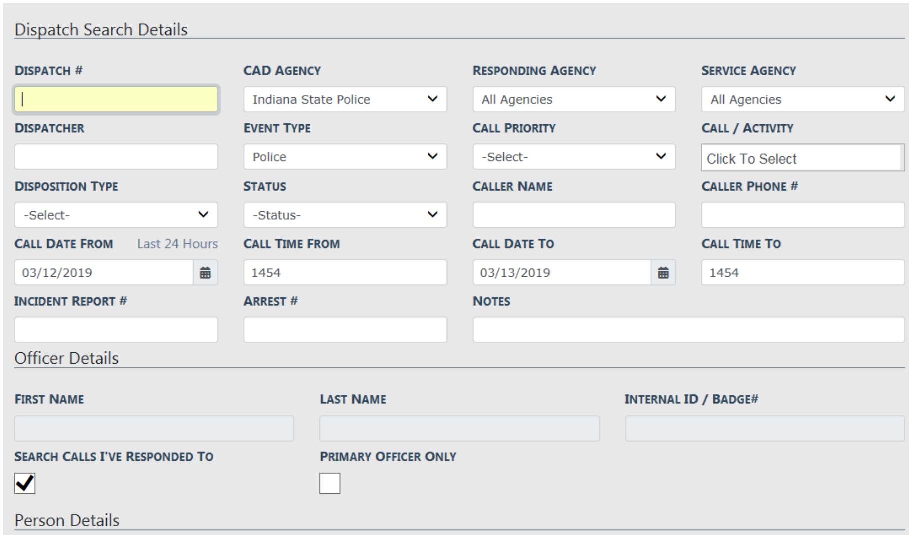
2. Enter the **Report#** if known, otherwise enter the known information, then click the **Search** button to view the results of your search.



3. Click on the **Select** icon  to select the appropriate **Incident Report**. The selected report will then appear on the **Associated Events** tab of the **Field Arrest** record.

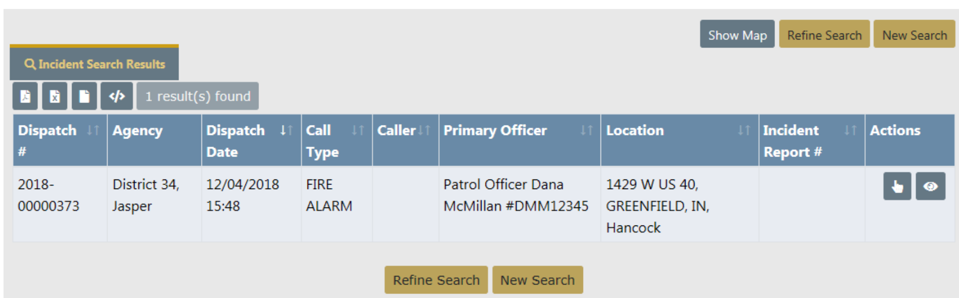
Select Existing Call

1. Select the **Select Existing Call** link to associate an existing **Calls for Service** to the **Field Arrest**. The *Calls For Service Search* screen opens.



2. Enter the **Dispatch#** if known, otherwise enter the known information.

3. Click the **Search** button to view the results of your search.



4. Click on the **Select** icon  to select the appropriate **Calls for Service**.

5. The selected CFS then appears on the **Associated Events** tab of the **Field Arrest** record.

6. When you are finished adding the necessary associated events, click the **Next Section** button to advance to the *Charges/Warrants* tab.

Validations on Field Arrest Imports

The **Field Arrest** can be associated to an **Incident Report**, and data from the **Field Arrest** can be imported into the **Incident Report**.

When associating a **Field Arrest** to an **Incident Report**, don't assume all of the **Field Arrest** information is automatically associated to the **Incident Report**, for this has led to improper

UCR and NIBRS reporting.

If a **Field Arrest** is associated to a report, then Online RMS verifies that at least one offense from the associated **Field Arrest** was added to the **Incident Report**, if no offense was associated or added to the **Incident Report** then validation errors occur:

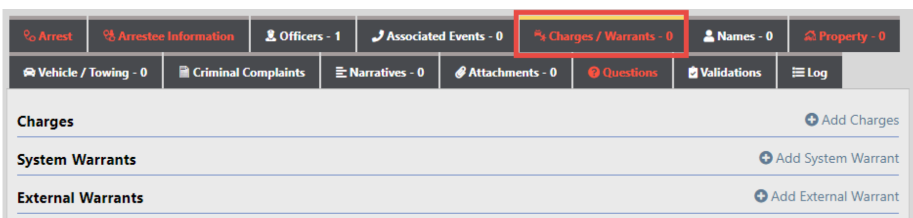
- Field arrest information - At least one offense from the field arrest must be included.

If a **Field Arrest** is associated to a report, then Online RMS verifies that Arrestee (person name) from the associated **Field Arrest** is added to the **Incident Report**, if no arrestee was associated or added to the **Incident Report** then validation errors occur:

- Field Arrest Information - Arrestee from field arrest must be included on report.

Charges and Warrants

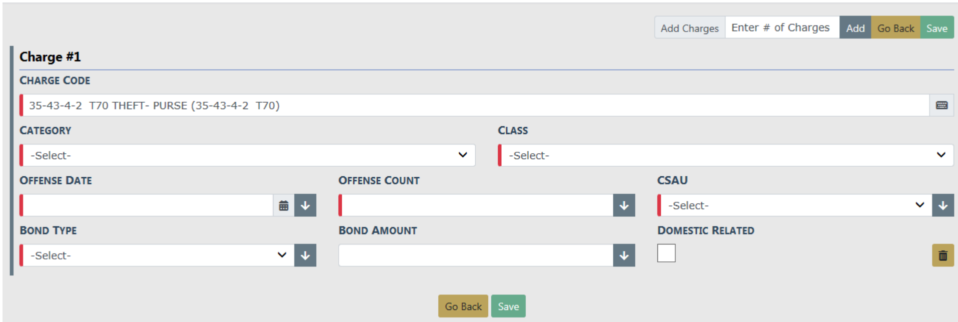
On this screen you have the option to **Add Charges**, **Add System Warrants**, and **Add External Warrants**.



Note: If there is an active *System Warrant* a red link appears to the left of **+Add System Warrant** with the person's name. Click the red link for Warrant options.

1. Click the **Add Charges** link to add the Charge.
2. For the **Charge Code** type in a portion of the offense description then select from the drop-down.

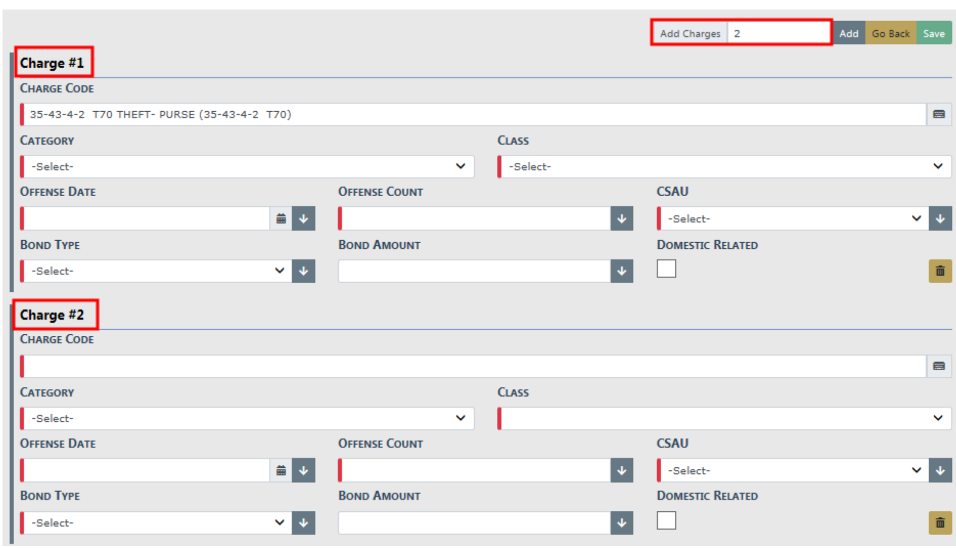
Note: You must enter each charge separately.



3. If the Charge is domestic related, check the **Domestic Related** box.

4. If a Charge is selected that has a default Bond Type or Amount configured for the Charge Category and Class related to the Charge Code or directly at the Charge Code level, the **Bond Amount** and **Type** automatically populates for you. You can update the Bond information as needed.

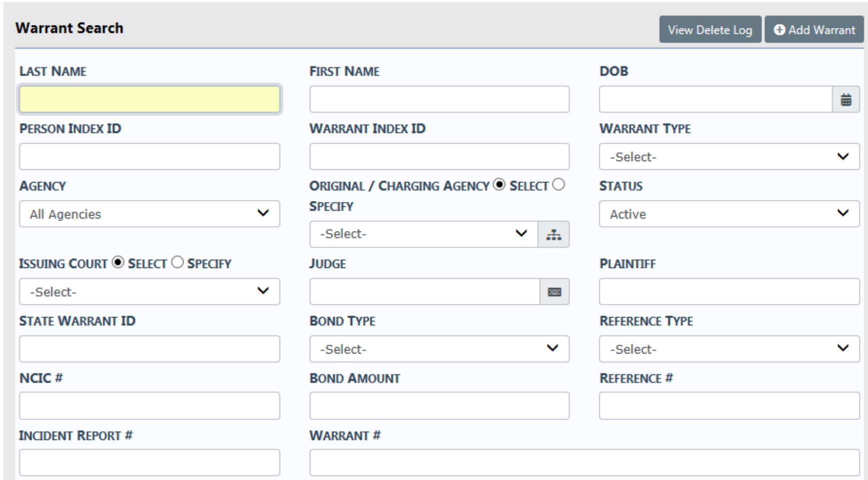
5. Click the **Add** button on the top right of the screen to add additional charges. Alternatively, you can enter the number of charges in the Add Charges text box to add a set of fields for that many charges.



6. Click the **Save** button to add the Charges to the Field Arrest.

7. Click the **Add System Warrant** and **Add External Warrant** links to add that information, if appropriate.

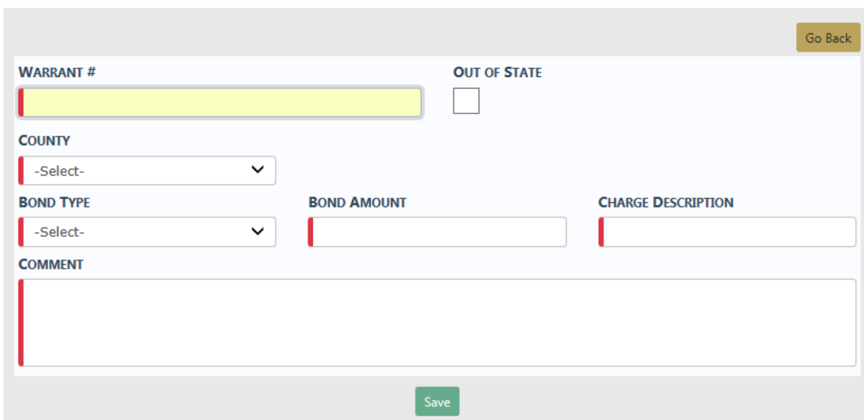
   a. Click **Add System Warrant** to open *Warrant Search*.



b. **Search** for the existing Warrant, then select from the results list to add it to the Arrest.

If the Warrant does not exist, you can click on the **Add Warrant** button on the Warrant Search screen. For more information on searching or adding Warrants, refer to WARRANTS.htm.

c. Click **External Warrants** to open the *Add External Warrant* form.

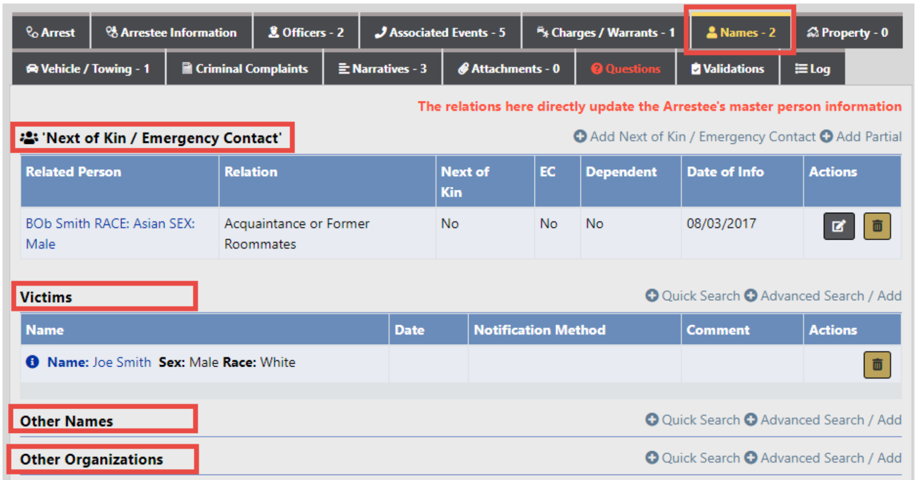


d. Enter the appropriate information, then click **Save** to add it to the Arrest. (Beginning with RMS 11.15 and higher, this form also includes a field for the case number.)

8. Once you have completed all information, click the **Next Section** button to advance to the *Names* tab.

Names

The **Names** tab contains **Next of Kin/Emergency Contacts**, **Victims**, **Other Names**, and **Other Organizations**.



Next of Kin/Emergency Contact

1. Click the **Add Next of Kin/Emergency Contact** link to open the *Master Person Search* screen to search for the name in the Master Person Index module.

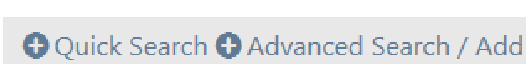
2. Or, if when Arrestees do not provide sufficient information to create a master person record. Click the **Add Partial** link to provide minimal information, then search the master index with the entered data.

   a. If a matching master person index record is not found, you can save it to the arrest without creating a master person record.

   b. If a matching master person index record is found, select the record to add it to the arrest.

Victim, Other Names, Other Organizations

1. Click the **Quick Search** link to search for the name or organization in the associated Master Indices module. If you do not find it in the Master Index, click the **Advanced Search/Add** link to add.



For more information on searching in and adding records to the Master Indices, refer to "Master Indices" on page 83.

Once you have completed all information, click the **Next Section** button to advance to the *Property* tab.

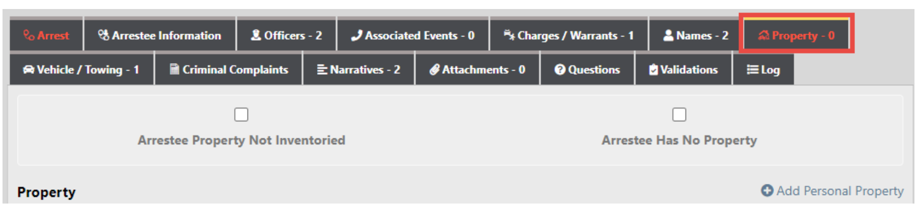
Property

The **Property** tab is applicable only when *Field Arrest Property* is setup to be used from the *Field Arrest Module Admin* page.

Enter **Property** that needs to be inventoried and belonging to the Arrestee.

If there is no property to be inventoried, check the **Arrestee Property Not Inventoried** box.

If the arrestee has no property, check the **Arrestee Has No Property** box. This checkbox is not available when there is property on the arrest.

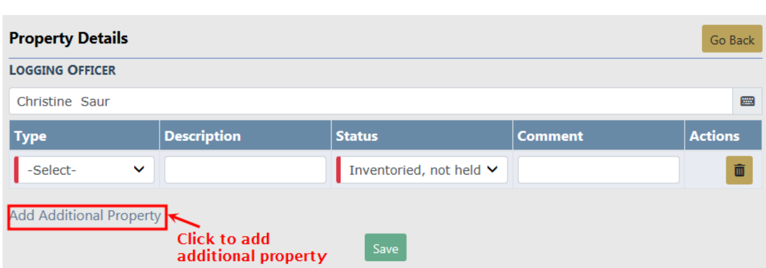


If there **is Property** to be inventoried, follow the next steps:

1. Click the **Add Personal Property** link to open *Property Details*.

Note: The **Arrestee Property Not Inventoried** box must be unchecked for the **Add Personal Property** link to appear.

2. The *Logging Officer* defaults to the *Arresting Officer*. Make sure this information is accurate.



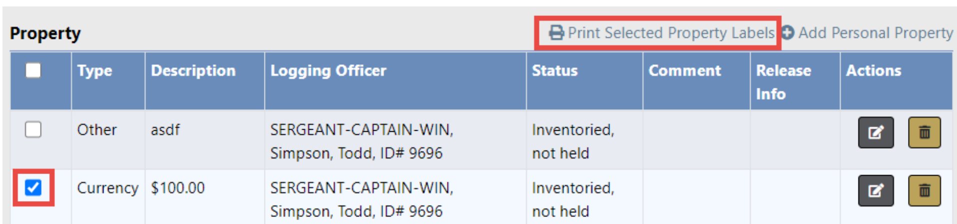
3. Using the Drop-downs and free text boxes, enter the appropriate description and any comments.

4. Click the **Add Additional Property** link to add additional property, if applicable

5. Click the **Save** button.

6. The **Property** appears in the grid and a **Print Selected Property Labels** link appears.

7. Select one or more property records, then click the **Print Selected Property Labels**.



	Type	Description	Logging Officer	Status	Comment	Release Info	Actions
☐	Other	asdf	SERGEANT-CAPTAIN-WIN, Simpson, Todd, ID# 9696	Inventoried, not held			
☑	Currency	$100.00	SERGEANT-CAPTAIN-WIN, Simpson, Todd, ID# 9696	Inventoried, not held			

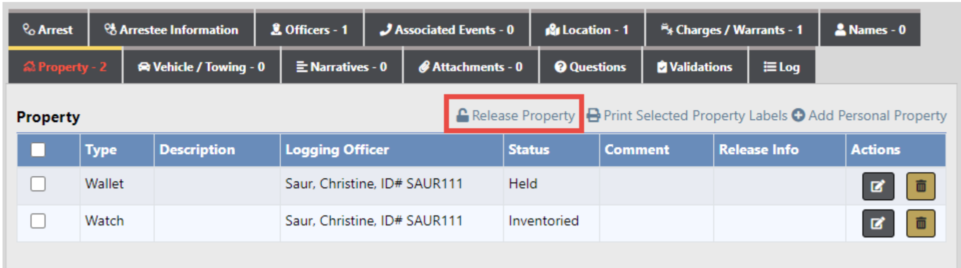
8. A **FieldArrestProperty.pdf** file downloads to your machine.

Note: If a **Release Property link** appears, you can click on the link to release property. For more information on releasing property, refer to "Release Property" below.

9. Once you have completed all information, click the **Next Section** button to advance to the *Vehicle/Towing* tab.

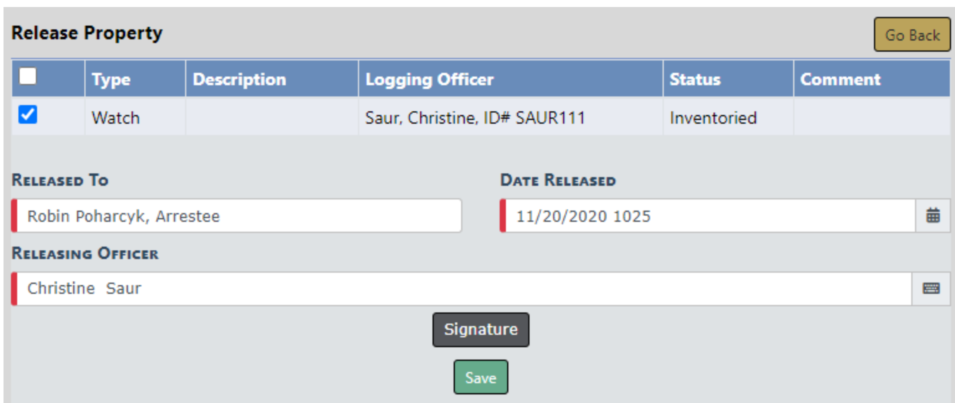
Release Property

For your convenience, you can release property from the *Property* tab of the *Edit Field Arrest* page.



The link appears only if there is at least one property record that is eligible for release.

1. Click on the **Release Property** link to open the *Release Property* form listing the property that is eligible for release.



2. **Check** one or more property records you want to release. While one item appears in the example, there could be multiple.

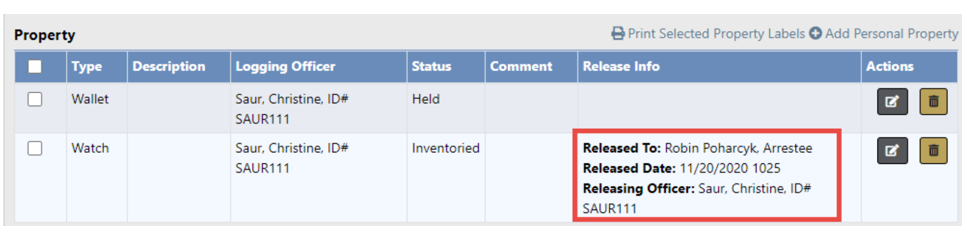
3. Enter **Released To** and **Date Released**.

4. Select a different **Releasing Officer** or leave as the default.

5. Optionally, click the **Signature** button to sign.

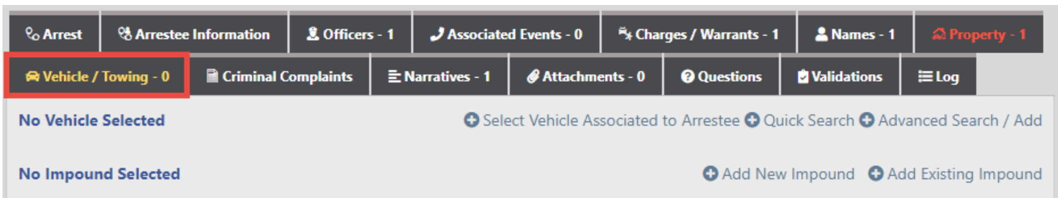
6. Click **Save**.

7. The release information appears on the property record.



Notice the **Release Property** link no longer appears. In this example, there are no longer existing property records that are eligible for release; if there were, the link would still be available.

Vehicle/Towing



The **Vehicle** must exist in the *Master Index* module before you can associate it to an Arrestee. With the proper permissions, you can add it to the *Master Vehicle Index* if it doesn't exist. For more information about the *Master Index* module, refer to "Master Indices" on page 83.

Associate a Vehicle

1. Associate a vehicle to the Arrestee one of three ways:

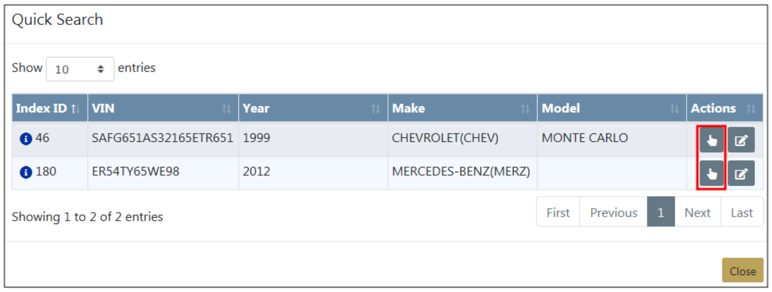
   <u>**Select Vehicle Associated to Arrestee**</u>

   Note: This option is available only when at least one vehicle is associated with the Arrestee.

   Click the **Select Vehicle Associated to Arrestee** link, if available, to add a **Vehicle** associated with the Arrestee. This link appears only when at least one vehicle is linked to the person listed as the Arrestee.

   Click the **Select** icon to select the vehicle you want to associate with the Arrestee.



Note: Only one vehicle can be associated with an Arrestee.

With appropriate permissions, you can click on the **Edit** icon to update the *Master Vehicle Index* record, if necessary. For more information on updating a Master Vehicle Index record, refer to "Master Indices" on page 83.

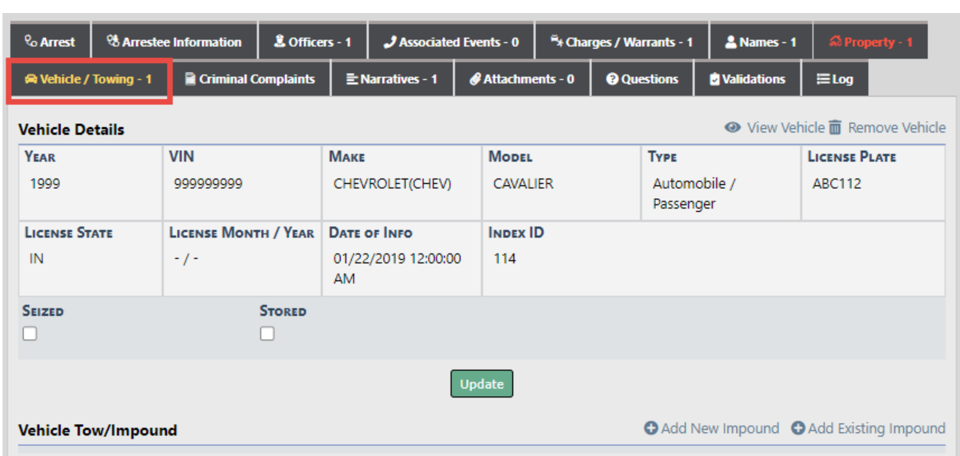
Quick Search

Click the **Quick Search** link to search for the **Vehicle** by *VIN*, *License Plate*, and *State*. If the **Vehicle** appears on the search results, click the Select icon to select it.

Advanced Search/Add

If the **Vehicle** is not in the *Master Vehicle Index*, click the **Advanced Search/Add** link to add the **Vehicle** to the *Master Vehicle Index*. For more information on searching and adding a *Master Vehicle Index* record, refer to "Master Indices" on page 83.

2. Once you select the **Vehicle**, it appears in the Vehicle/Towing tab of the Field Arrest.



You can click the **View Vehicle** link to view vehicle details or click the **Remove Vehicle** link to remove it from the Field Arrest.

3. Check the **Seized** box if the vehicle was seized.

4. Check the **Stored** box if the vehicle was stored.

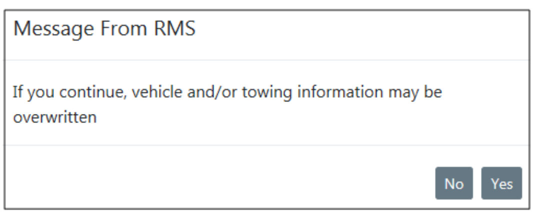
5. Click the **Update** button to save your updates.

Add Vehicle Tow/Impound

Vehicle Tow/Impound appears at the bottom of the screen.

1. Click the **Add New Impound** link to add a new record, or click **Add Existing Impound** to select an existing Impound record, then enter the necessary information.

2. If a vehicle record already exists on the Field Arrest, a warning stating the existing vehicle and towing information may be overwritten. Click **Yes** to continue and overwrite the existing vehicle and towing information, or click **No** to exit without overwriting.



Note: When adding an existing Impound record, the vehicle associated with the Impound is added to the Arrest.

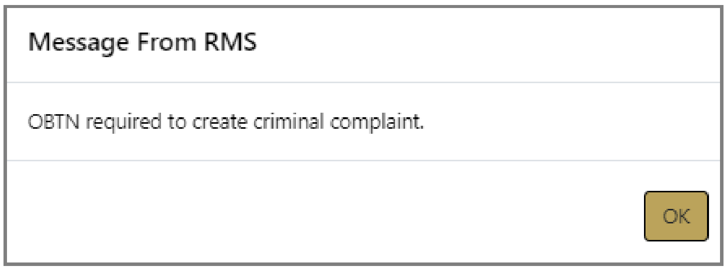
3. Click the **Update** button after all information is entered.

4. Once you have completed all information, click the **Next Section** button to advance to *Criminal Complaints* tab.

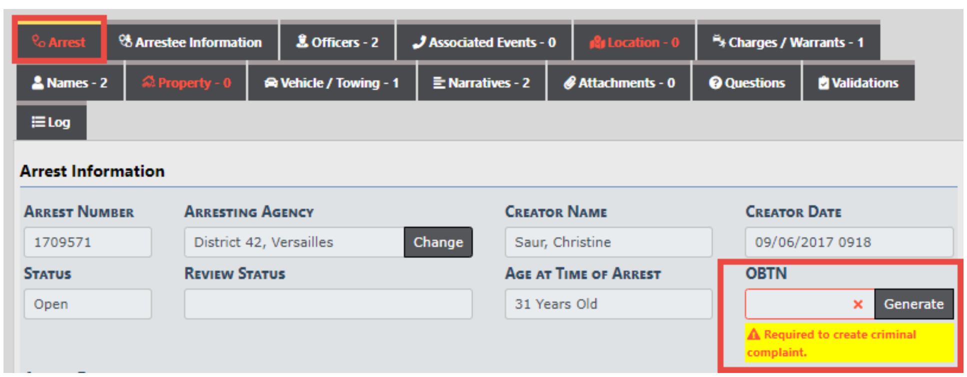
Criminal Complaints

1. Click the **Add Criminal Complaint** link to add a criminal complaint, if applicable. This option appears providing you have the appropriate permissions and the feature is turned on.

Note: If you receive a **OBTN** required message, click **OK**, then navigate to the **OBTN** (Offender Based Tracking Number for criminal complaints) on the *Arrest* tab.



Note: The label **OBTN** could appear as **Arrest Tracking Number** for your agency. This label is configurable by agency.

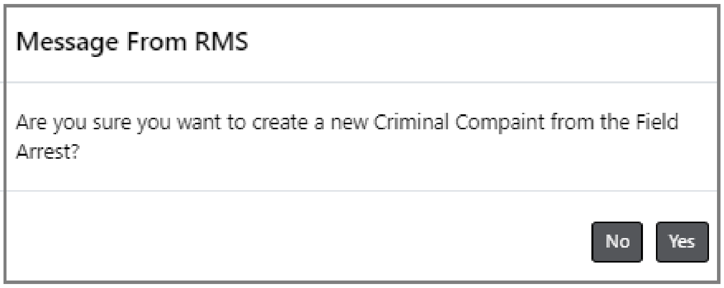


Enter or **Generate** the OBTN number, depending on how your administrator configured the OBTN number.

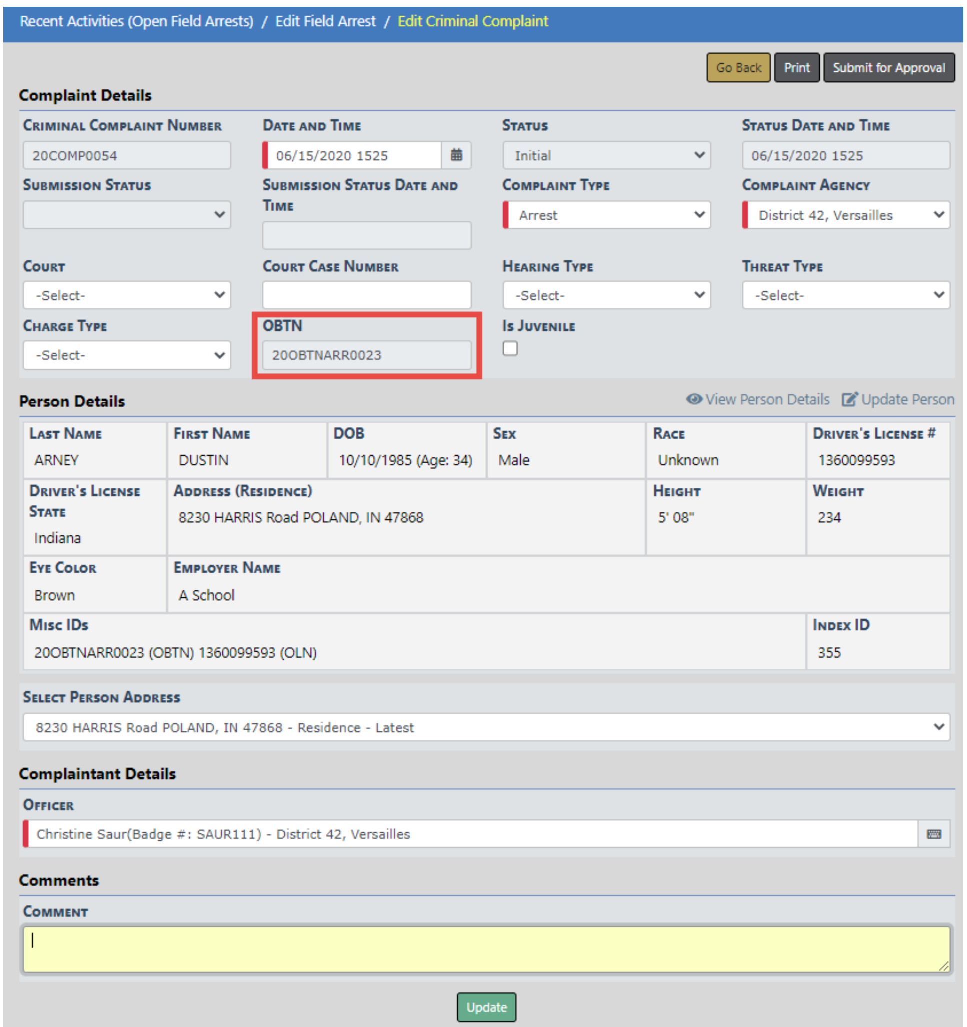
Note: The functionality of this field is configurable by agency. Your agency has the option to have users enter or generate the number.

Navigate to the *Criminal Complaints* tab and click **Add Criminal Complaint** after entering or generating the OBTN number.

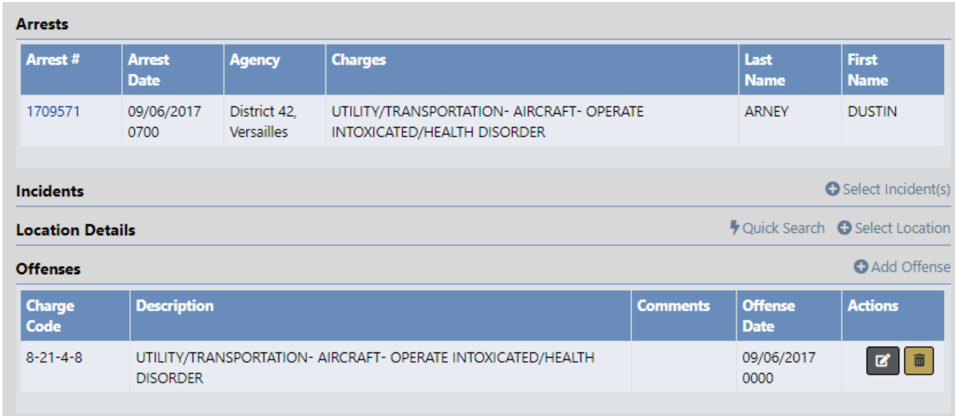
2. A new *Criminal Complaint confirmation* box appears, asking if you are sure you want to create a new one.



3. Click **Yes** to create the Criminal Complaint record and open the *Edit Criminal Complaint* form. The OBTN number appears on the form as read-only.



4. The Arrestee, Arresting Officer, Location, and Offenses from the Field Arrest pulls into the Criminal Complaint form automatically as shown below.



5. Make the appropriate changes on the *Edit Criminal Complaint* and click the **Update** button.

   For more information on editing the Criminal Complaint, refer to “Edit a Criminal Complaint” on page 320.

6. Optionally, click the **Print** button to print the Criminal Complaint.

7. Optionally, click the **Submit for Approval** button to submit the Criminal Complaint for approval.

   For more information on submitting for approval, refer to "Submit Criminal Complaint for Approval" on page 329

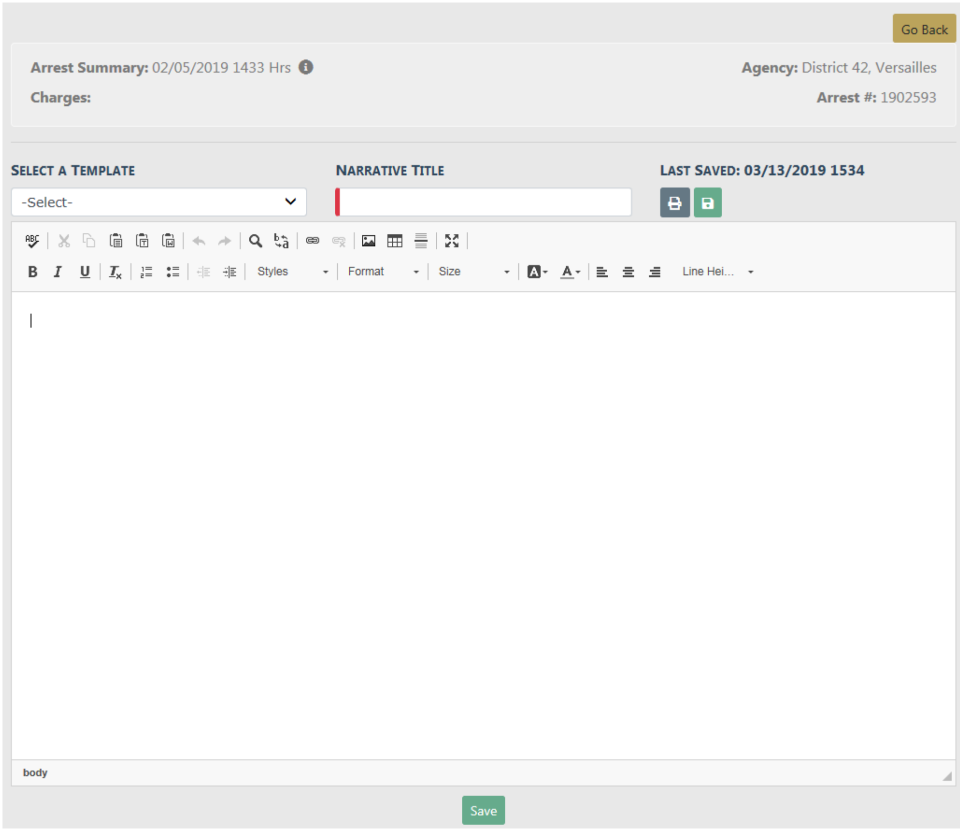
   Note: When the Criminal Complaint is approved, the approval process creates a Court Case automatically, providing your agency has the Court Case module turned on. For more information on Court Case, refer to “Court Case Overview” on page 333.

8. Click **Next Section** to navigate to *Narratives* tab, or click on the *Narratives* tab.

Narrative

The **Narrative** is not required to complete the **Field Arrest**. You can create one or multiple **Narratives**.

1. Click the **Add Narrative** link to open the *Add Narrative* screen. You must enter a **Title** and additional information in the body of the narrative.



2. You can use the formatting icons to customize the layout of your narrative. The built-in *Spelling and Grammar Checker* identifies mistakes and corrects them as you type.

Note: For more information on Narratives, refer to "Narrative Tab" on page 240.

Note: The Narrative auto-saves every 60 seconds while you type. The last saved date and time displays on the form.

3. To insert images, you must use the **Image** icon.

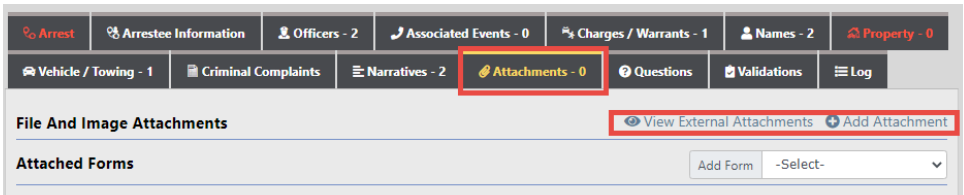
4. Click the **Save** button.

5. Click on the Print icon  if you wish to print the Narrative. Refer to "Printing from Online RMS" on page 39 for details.

6. Once you have completed all information, click the **Next Section** button to advance to the *Attachments* tab.

Attachments

Attachments are files that are accessed by other programs, such as a picture, document, spreadsheet, etc. These files are uploaded and saved to the **Field Arrest**. You can have none, one, or multiple **Attachments**.



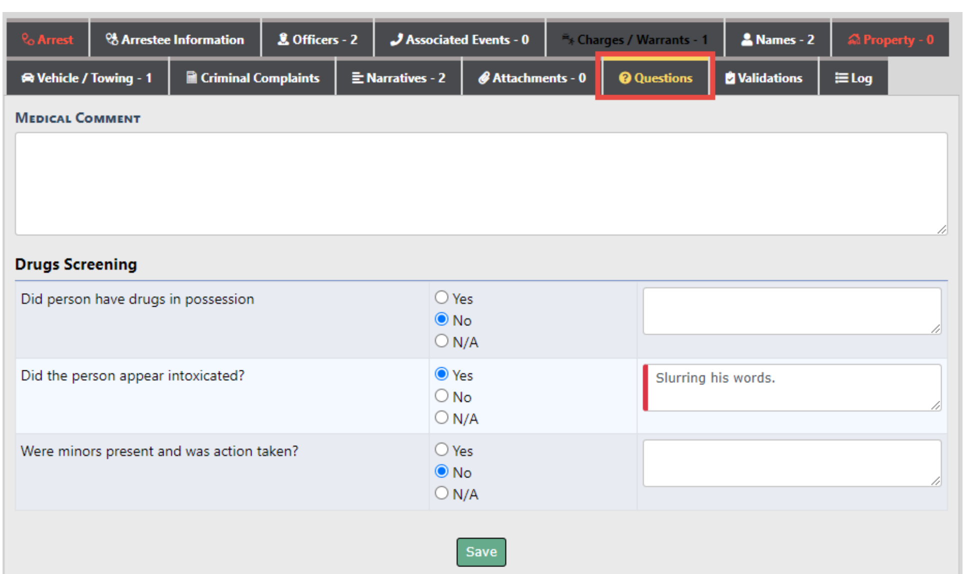
1. Click on the **Add Attachment** link to add attachments, or click **Image Library** to add image files from your personal *Image Library*. If images do not exist in your Image Library, then the hyperlink does not appear.

   Refer to "Attachments" on page 69 or "Image Library" on page 75 for more information.

2. Click the **Go Back** button after uploading **Attachments**.

3. Once you have completed all information, click the **Next Section** button to advance to the *Questions* tab.

Questions



1. Select and enter appropriate information in the fields provided.

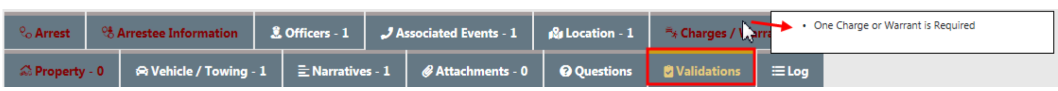
2. A red left border in the **comments** fields indicates comments are required. The border may appear depending on the answer you provide to the left of the comment. In the below example, the comments field becomes required when you indicate the person appears intoxicated.

3. Click the **Save** button.

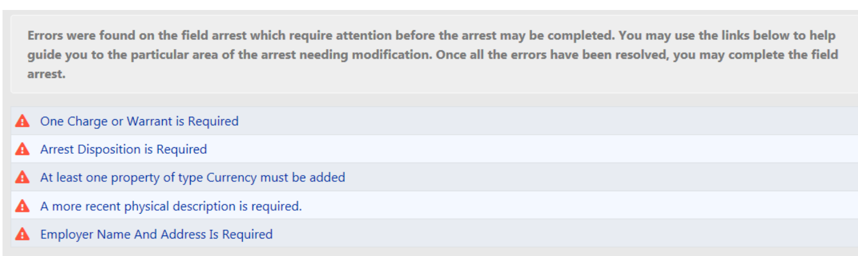
4. Once you have completed all information, click the **Next Section** button to advance to the *Validations* tab.

Validations

You must enter all required information before the system allows you to create the **Field Arrest** record. Tabs with missing required information display in red. Hover your mouse over the red tab to display a missing data message.



The **Validations** tab will also display the errors that are causing red tabs.



1. Click on each red tab to enter the missing data. Repeat until there are no longer red tabs.

   Note: If no errors, then there will be no red tabs.

2. Click on the **Complete** button at the top of the screen.

3. Enter any comments and click the **Submit** button. An approval *Notification* is sent to the *Approval Group*.

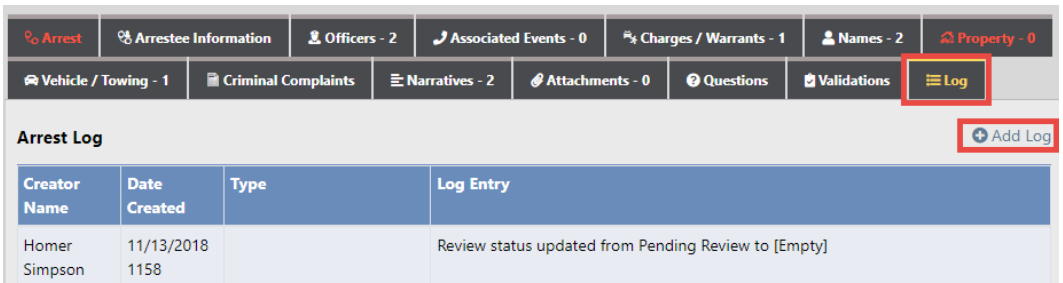
4. The **Field Arrest** is now complete.

Log

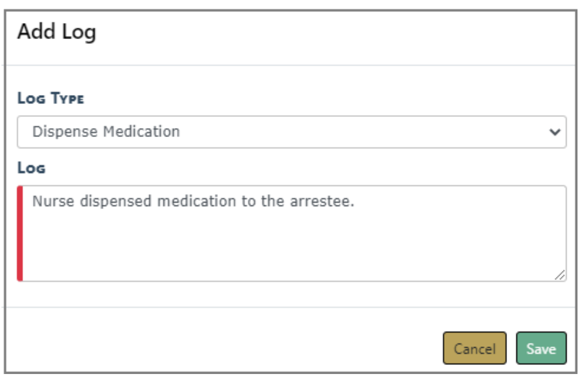
Activities affecting the **Field Arrest** are written systematically to the **Log** tab, creating a trail of events. For example, the system generates a **Log** entry when the **Field Arrest** is created, is updated, and another when it is submitted for approval. The **Log** entry includes the user name, date, and general description of the event.

To add your own Log entry:

1. Click on the **Add Log** button.



2. Select the **Log Type** and enter your **Log comments**.



3. Click **Save** to create and commit the entry to the Log.

   Note: **Log** entries cannot be updated or deleted.

Duplicate Field Arrest

There are times when multiple arrests occur for the same location and charges. You must create a separate **Field Arrest** record for each Arrestee, and for your convenience, the **Duplicate** button at the top of the *Edit Field Arrest* form duplicates the **Field Arrest** record for each Arrestee systematically to avoid duplicate manual entry.

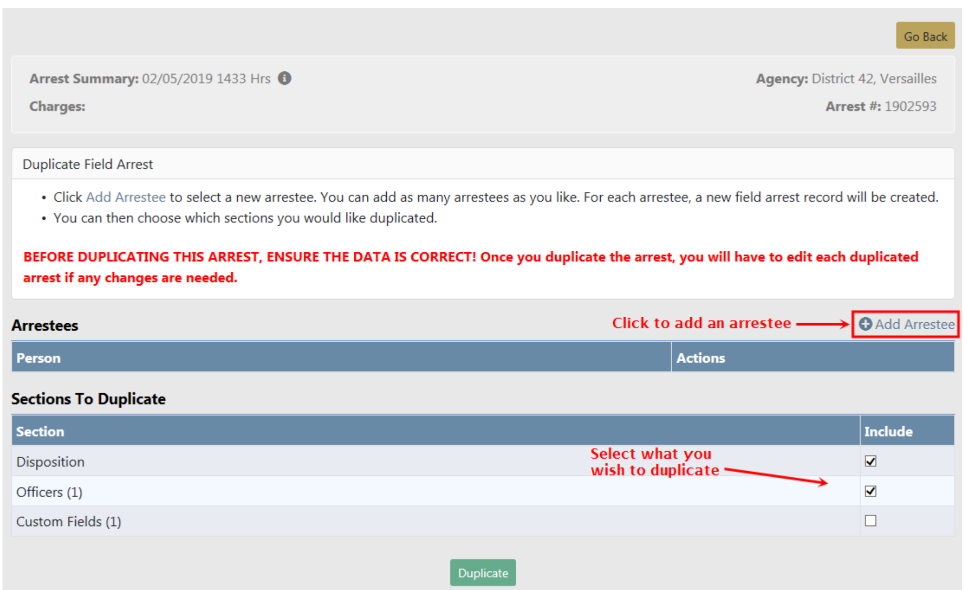
During the **Duplicate** process, you also select the **Field Arrest** areas to **Duplicate**, such as officers, narrative, charges, etc.

When adding a new **Field Arrest** the *Edit Field Arrest* screen appears automatically after selecting the Arrestee. For more information on adding **Field Arrests** refer to "Create Field Arrest Manually" on page 361.

To **Edit** an existing **Field Arrest** you must first **Search** for the **Field Arrest** you want to **Edit**, then select the appropriate **Field Arrest** to open the *Edit Field Arrest* screen. For more information on searching **Field Arrests** refer to "Search Field Arrests" on page 358.

1. When the *Edit Field Arrest* screen appears, click the **Duplicate** button on the top right to begin the duplication process.

2. The *Duplicate Field Arrest* screen appears.



3. Adding all applicable Arrestees is the first step in the duplication process. Click the **Add Arrestee** link to open the *Master Index Search* screen.

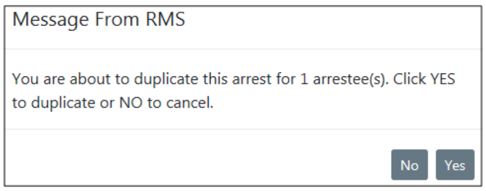
4. Search and select the person to add it to the duplicate Field Arrest record. For more information on searching and selecting a person, refer to "Master Indices" on page 83.

5. Click the **Add Arrestee** link to add another Arrestee if needed. You may add as many Arrestees as necessary.

6. After adding all the Arrestees, **select** the appropriate sections to duplicate. The list that appears in the *Sections to Duplicate* section vary based on the information that exists on the original **Field Arrest** record.

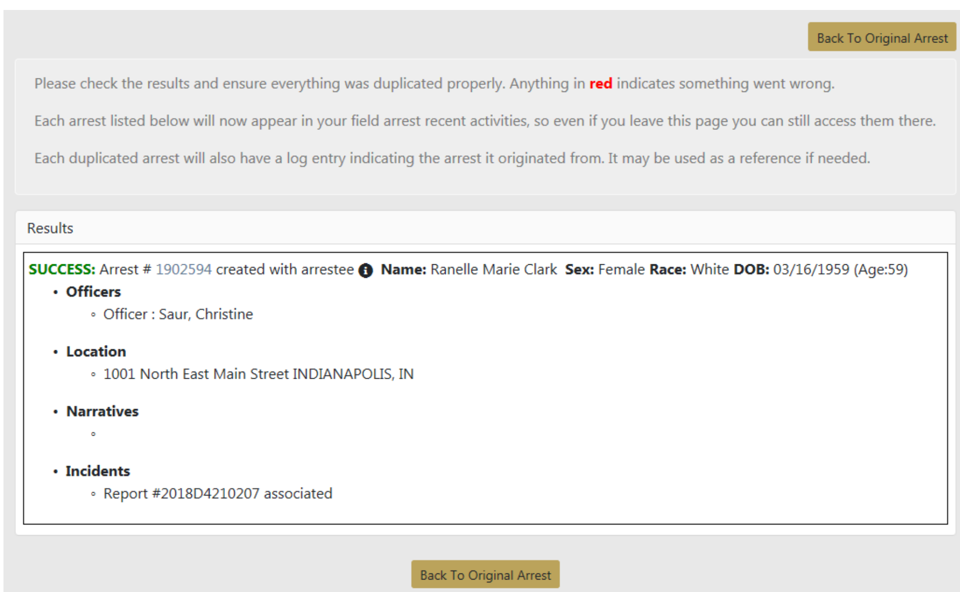
7. Click the **Duplicate** button to create a duplicate record for each Arrestee listed, or click **Go Back** at the top of the *Duplicate Field Arrest* screen to return to the *Edit Field Arrest* screen without duplicating.

8. If you chose to click the **Duplicate** button a confirmation message appears.



9. Click **Yes** to duplicate, or click **No** to return to the *Duplicate Field Arrest* screen without duplicating.

10. If you chose to duplicate, the *Duplicate Field Arrest Results* screen appears indicating success or failure. Read the Instructions at the top of the screen to understand how to interpret the results.



11. Click **Back to Original Arrest** to return to the original **Field Arrest**.

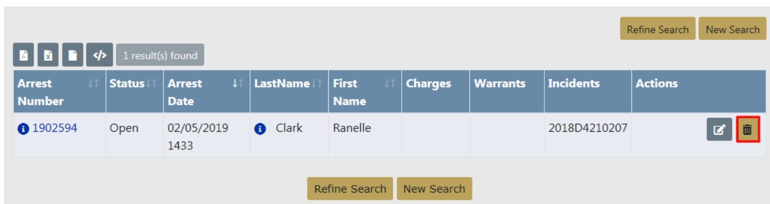
To view Field Arrests for the other Arrestees, you must **Search** for their Field Arrest records. For more information on searching Field Arrests refer to "Search Field Arrests" on page 358.

You may edit the individual **Field Arrest** records. For information on editing Field Arrest records refer to "Edit Field Arrest" on page 370.

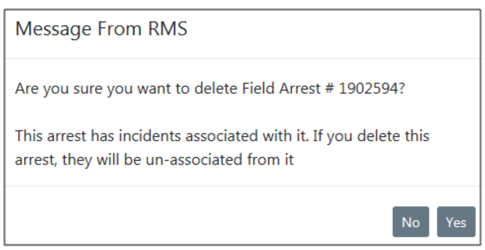
Delete Field Arrest

To **Delete** an existing **Field Arrest** you must first **Search** for the **Field Arrest** you want to **Delete**. For more information on searching **Field Arrests** refer to "Search Field Arrests" on page 358.

1. In the *Search Results* window locate the appropriate **Field Arrest** record then click on the **Delete** icon under the *Actions* column. If the **Delete** icon does not appear on that record then you do not have delete permissions. See your administrator for more information on permissions.

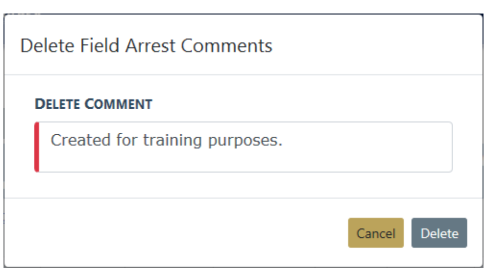


2. A confirmation box appears after you click on the **Delete** icon.



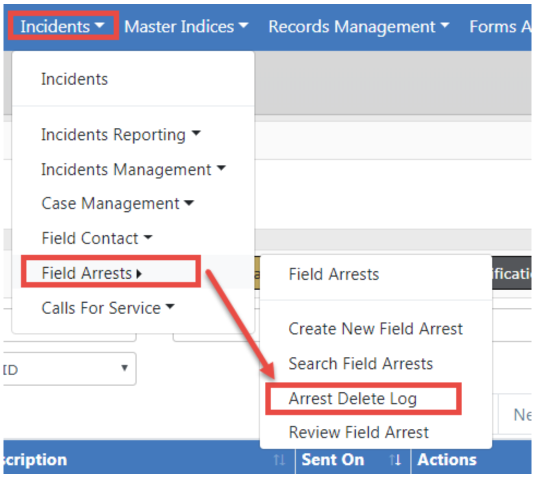
3. Click **Yes** to confirm or **No** to return to the *Search Results* without deleting. If you choose to delete the arrest, any associated incidents become unassociated.

4. If you clicked **Yes**, you must then enter the reason for the delete, then click the **Delete** button. Or click **Cancel** to abort the delete process.

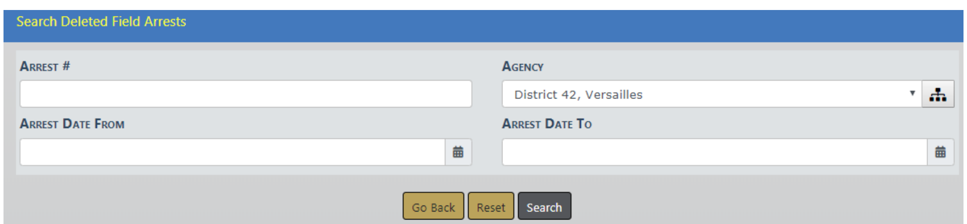


View Arrest Delete Log

The deleted **Field Arrest** is logged automatically for tracking purposes. To view the log entry, select the *Incidents* menu, *Field Arrests*, then *Arrest Delete Log*.



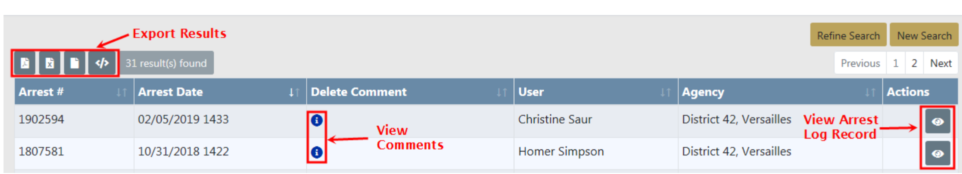
1. The *Search Arrest Delete Log* screen appears.



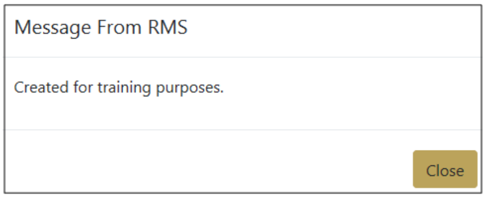
2. Search for the log entry by entering a date range or Arrest Number if you know it, or leave all fields blank to view all log entries, then click the **Search** button to return a list of all log entries that match your search criteria.

3. You can export the search results to various file types, view the comments that were entered at the time the arrest record was deleted, and view the deleted log entry.

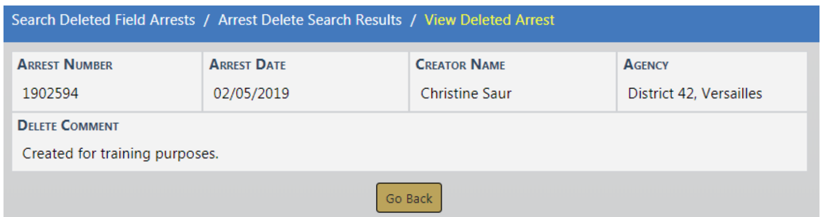
Note: For more information on exporting the results refer to "Export Search Results" on page 36.



Comments



View Arrest Log Record

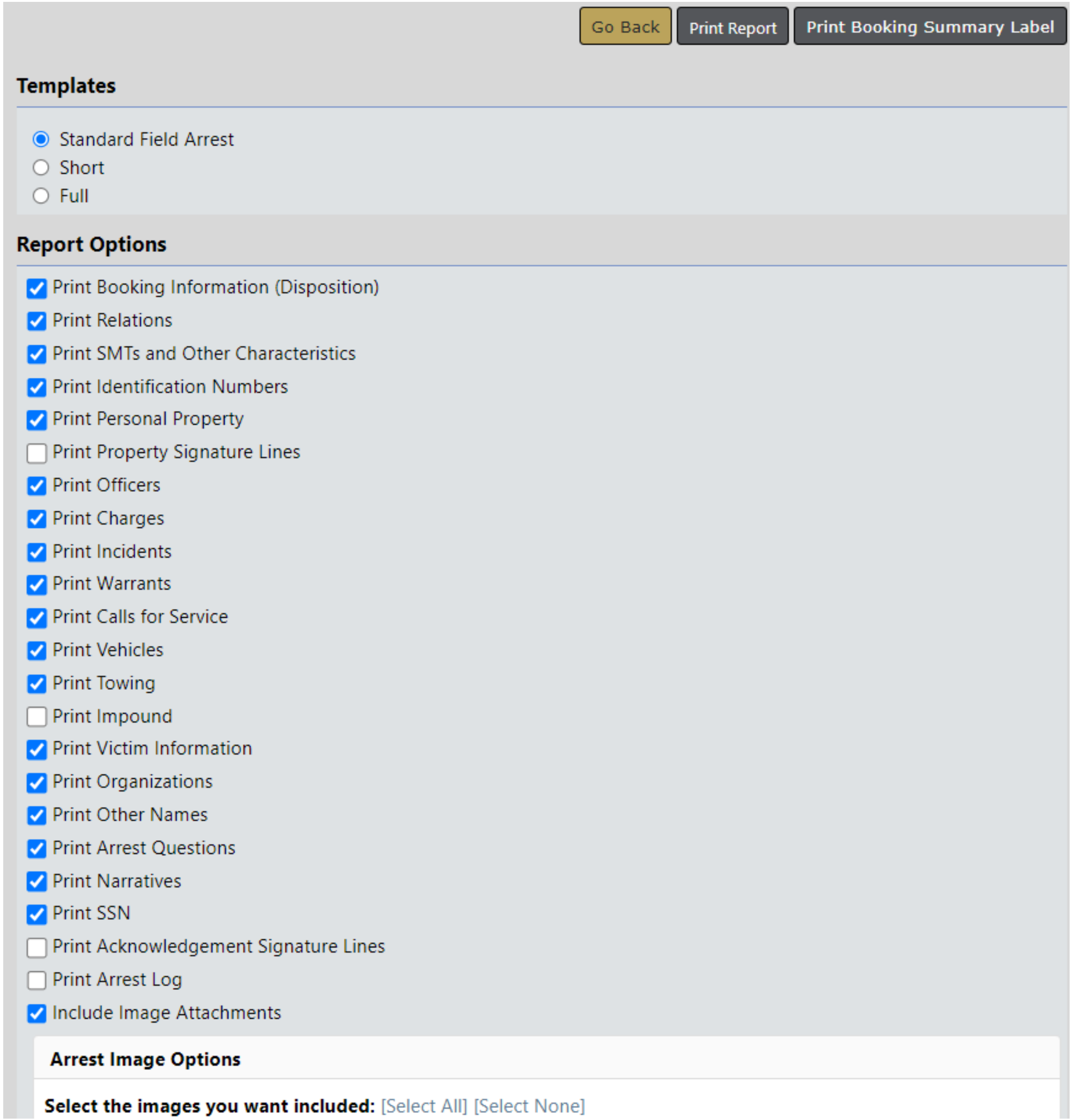


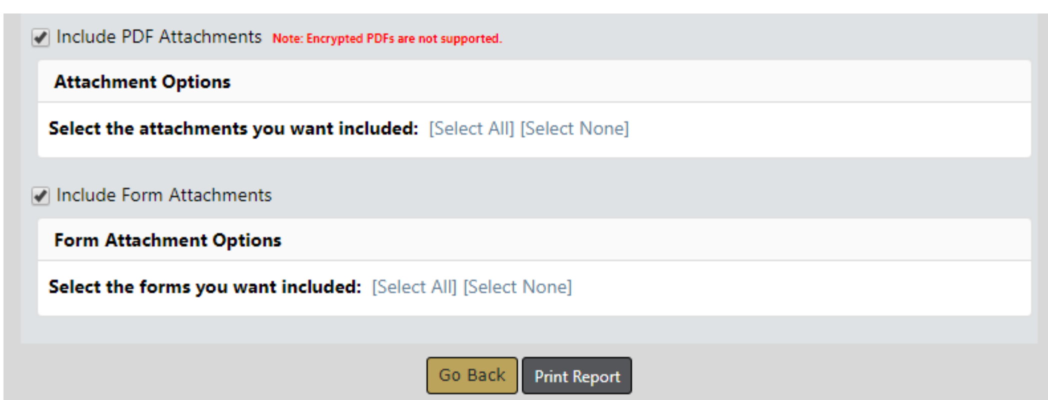
Print Field Arrest

You can **Print** an existing Field Arrest from either the *View Field Arrest* or *Edit Field Arrest* page.

1. From either page, click on the **Print** button.

2. The **Print Options** page opens, with the default settings selected automatically.


Go Back
Print Report
Print Booking Summary Label
Templates
Standard Field Arrest
Short
Full
Report Options
Print Booking Information (Disposition)
Print Relations
Print SMTs and Other Characteristics
Print Identification Numbers
Print Personal Property
Print Property Signature Lines
Print Officers
Print Charges
Print Incidents
Print Warrants
Print Calls for Service
Print Vehicles
Print Towing
Print Impound
Print Victim Information
Print Organizations
Print Other Names
Print Arrest Questions
Print Narratives
Print SSN
Print Acknowledgement Signature Lines
Print Arrest Log
Include Image Attachments
Arrest Image Options
Select the images you want included: [Select All] [Select None]


Include PDF Attachments
Note: Encrypted PDFs are not supported.
Attachment Options
Select the attachments you want included: [Select All] [Select None]
Include Form Attachments
Form Attachment Options
Select the forms you want included: [Select All] [Select None]
Go Back
Print Report

3. Select the **Template** you wish to use. The template preselects report options for you.

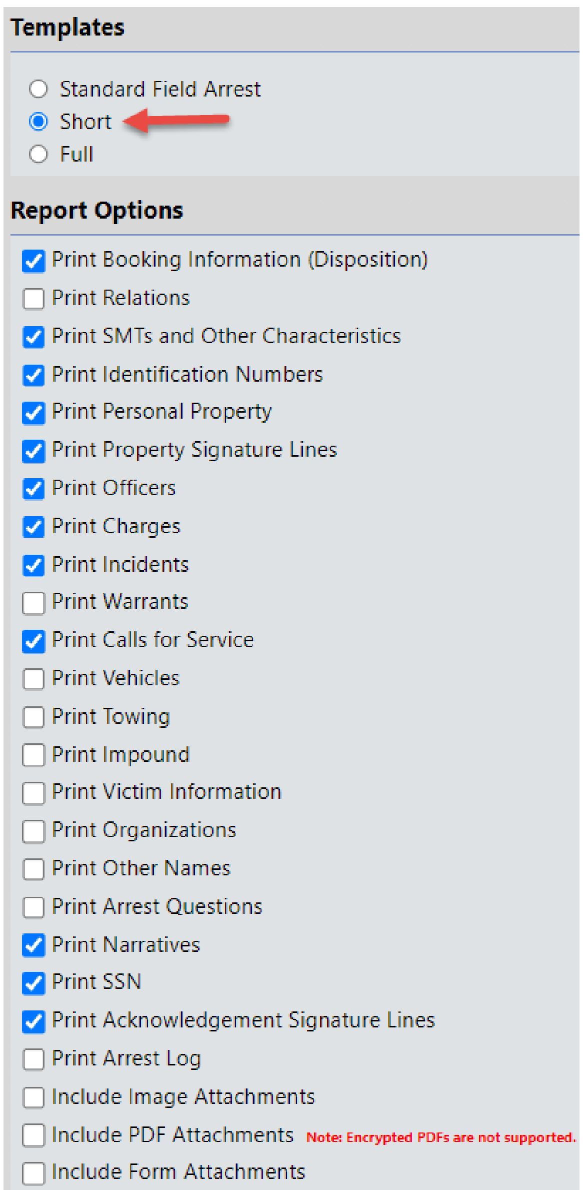
   - Standard Field Arrest

     - Selected by default.

     - All print options are available, and all, except for the *Print Acknowledgment Signature Lines*, are preselected as shown in step 2.

   - Short

     - A shortened set of print options are available, and fewer print options are preselected.



- Full
  - All print options are available, as shown in step 2, except all are preselected, including *Print Acknowledgment Signature Lines*.

Note: Whichever template you choose, you can still elect to select or deselect print options.

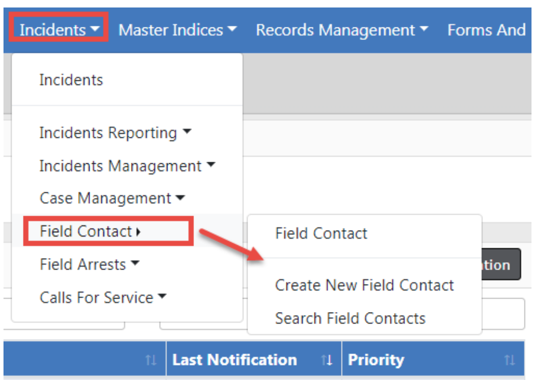
4. Select or deselect any **Report Options**, if needed.
5. Select **Arrest Image Options**, if applicable, by clicking **Select All** to include all existing arrest images on the report, or click **Select None** to exclude all arrest images.
6. Select the **PDF Attachments** you want to include or exclude, if applicable, by clicking **Select All** to include all existing PDF attachments on the report, or click **Select None** to exclude all.
7. Select the **Form Attachments** you want to include or exclude, if applicable, by clicking **Select All** to include all existing form attachments on the report, or click **Select None** to exclude all.
8. Click on the **Print Report** button to open a PDF as a new tab in your browser. If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.
9. Optionally select the **Print Booking Summary Label** button to open a PDF as a new tab in your browser. If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

   The PDF includes a barcode , arresting officer, arrestee information such as, SSN, address, DOB, offenses, and physical description.

Chapter 20. Field Contacts

Overview

A **Field Contact** gives you the ability to document a situation such as an encounter with a suspicious person. The situation is such that it does not warrant an *Incident Report* but you still want to document it in the event something comes of it. That way it is searchable and you see the **Field Contact** associations within the *Master Indices* section. **Field Contacts** are located in the *Incidents* menu where you can search existing or create new **Field Contacts**.



When completing a **Field Contact**, you are able to document:

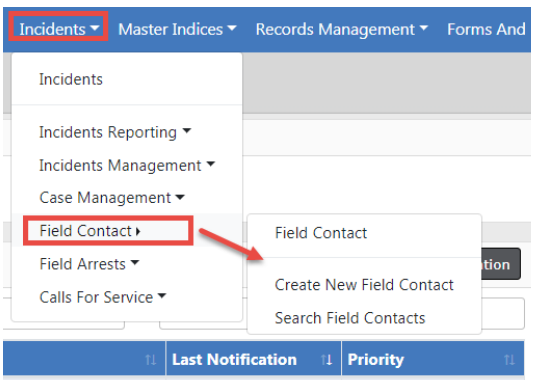
- Notes
- Location
- People
- Officers
- Vehicles
- Gangs
- Organizations
- Attachments
- Associate existing Incidents from within the Field Contact.
- Create Incidents from within the Field Contact.

- Associate existing Calls from within the Field Contact.

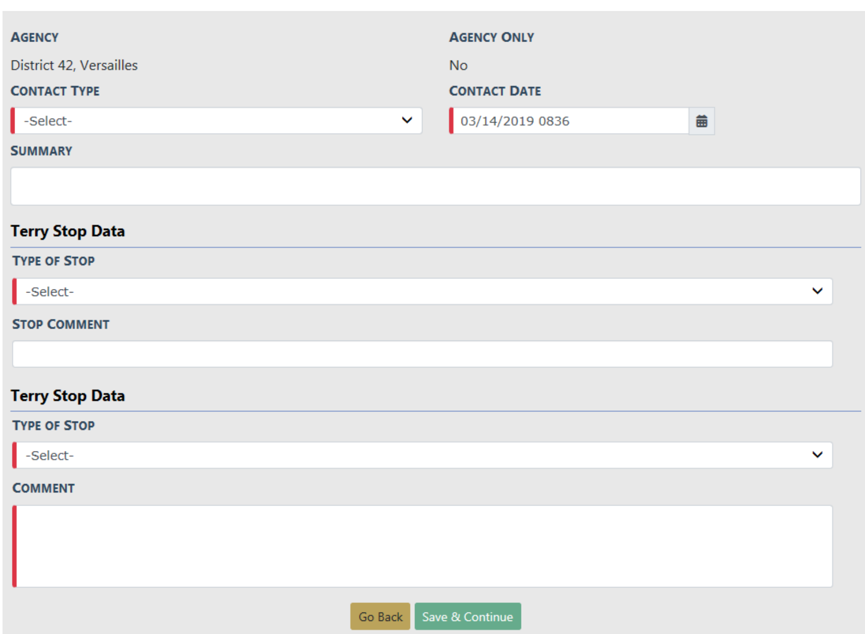
An *Incident Report* can also be generated from the **Field Contact**, similar to the **Field Arrest**. Once the **Associate Incident** link is selected, you will be able to select what information should be transferred to the *Incident Report*.

Add a Field Contact

Field Contacts are located under the Incidents menu.



Click **Create New Field Contact** menu option to open the **Add Field Contact** form.



Enter the necessary data.

Click **Save & Continue** to open the **Edit Field Contact** form.

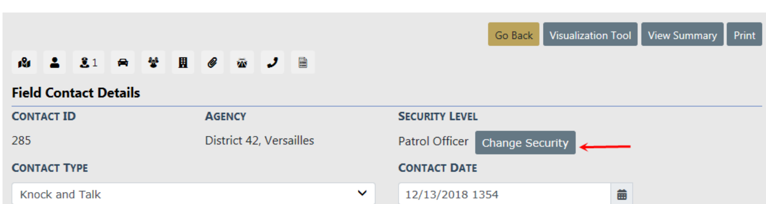
Enter the applicable sections of the **Edit Field Contact** form, then click the **Save** button:

- Field Contact Details
- Stop Data
- Location
- People
- Officers
- Vehicles
- Gangs
- Organizations
- Attachments
- Add (associate) existing Incidents from within the Field Contact.
- Create Incidents from within the Field Contact.

  Note: Once the **Associate Incident** link is selected, you will be able to select what information should be transferred to the *Incident Report*.

- Add (associate) existing Calls from within the Field Contact. If the selected Incident is associated with a Calls For Service, a dialog box with the information appears, giving you the option to associate the Calls For Service to the Field Contact.

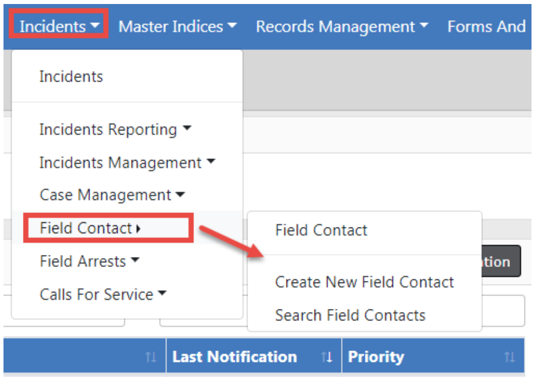
Once the **Field Contact** is completed, you can increase the **Security Level** if necessary.



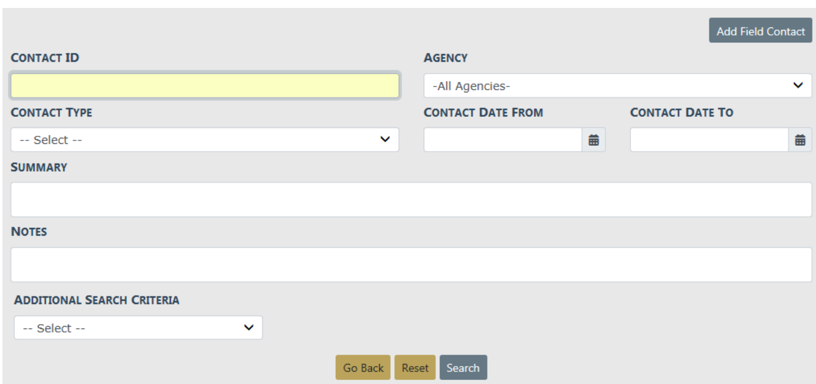
Note: For more information on the **Edit Field Contact** form, refer to "Edit a Field Contact" on page 412.

Search for a Field Contact

Field Contacts are located in the *Incidents* menu where you can search existing or create new **Field Contacts**.

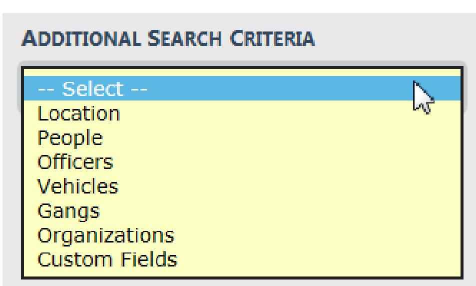


1. Select **Search Field Contacts** from the menu to open the *Search Field Contacts* form.

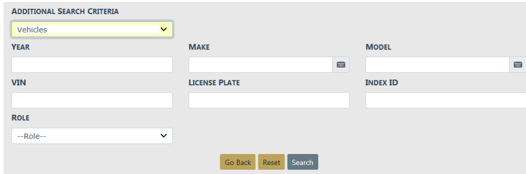


2. Enter the necessary data that assists with finding the **Field Contact** record.

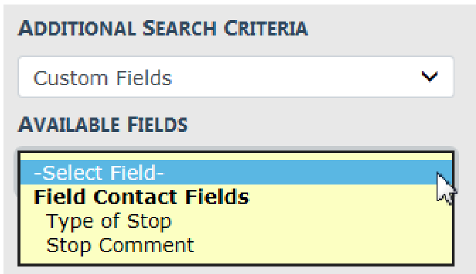
   The **Additional Search Criteria** allows you to include information from a specific section, if needed. Additional search fields will appear if you choose one of the available options from the list.



   Vehicle example:

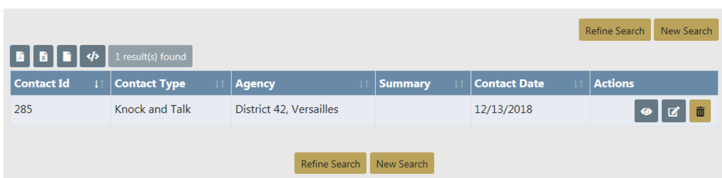


Custom Fields example:



NOTE: *Custom Fields* is available for agencies that have the *Custom Fields* feature enabled. *Custom Fields* captures data defined by the agency. For more information refer to your administrator.

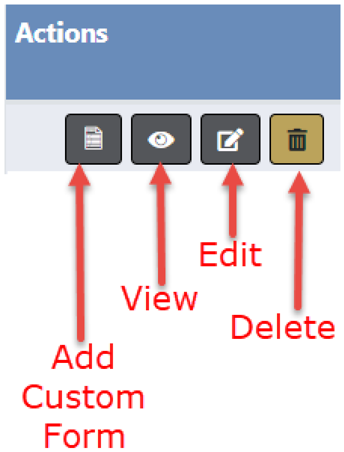
3. Click the **Search** button to view the *Search Results*.



From the *Search Results* window, you have the ability to export the search results to a file using the icons below the *Search Results* tab. For more information refer to "Export Search Results" on page 36.

4. If you want to make changes to your current search or start a new search, click the **Refine Search** button or the **New Search** button, respectively.

5. The icons under the *Actions* column of the *Search Results* allow you to *Edit*, *View*, or *Delete* a **Field Contact**, if you have the proper permissions. If an icon does not display, then you do not have access to perform that function.

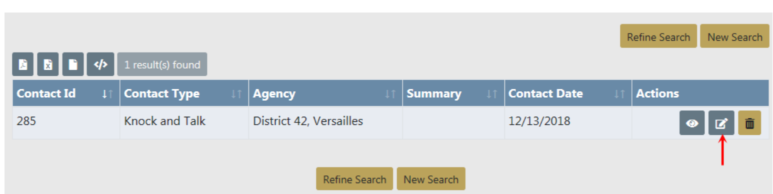


For more information refer to "Edit a Field Contact" below, "View a Field Contact" on page 414, or "Delete a Field Contact" on page 419.

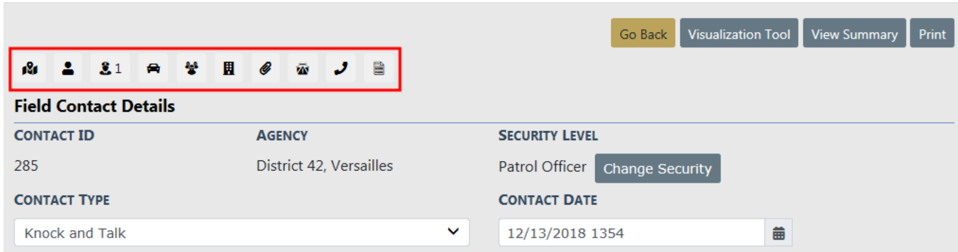
Edit a Field Contact

To edit a **Field Contact** you must first **Search** for the **Field Contact**, then select the *Edit* icon in the **Search Results** window. For more information on searching refer to "Search for a Field Contact" on page 410.

1. Select the **Edit** icon on the **Field Contact** record in the Search window to open the **Edit Field Contact** page.



There are several sections that make up the **Edit Field Contact** page. Each available section is listed across the top as icons. Click on any icon to go directly to the corresponding section, or scroll down the page to each section. The number that appears on the icon indicates the number of records associated with that icon. For example, the number 1 on the Officer icon indicates there is one officer record, and no number indicates there isn't a record associated with that icon.



Note: Field Contacts can associate with a Calls for Service (CFS) event while in Edit mode. Click on the **Calls for Service Go To** link or page down to the **Calls for Service** grid to add an associated CFS to a Field Contact record. If the CFS has associated incidents, a pop-up window appears to select incidents that should also be related to the Field Contact.

- Click the **Print** button to print the **Field Contact**. For more information refer to "Print Field Contacts" on page 419.
- Click the **Visualization Tool** button to view display connections between people, addresses, involvements, etc., in a graphical format. For more information refer to "Crime Visualization Tool" on page 155.

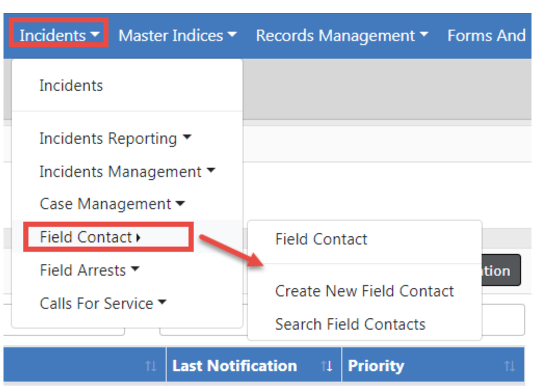
  Note: This button is based on user permissions and is not visible to all users. For more information contact your administrator.
- Click the **View Summary** button to view a summary of the **Field Contact**.

Click **Go Back** to return to the *Search Results*, or click **Edit Interview** to return to the **Edit Field Contact** page.

2. Complete all applicable sections and click the **Save** button after each section. For detailed instructions refer to "Enter or Update Field Contact Details" on the facing page.

View a Field Contact

Field Contacts are located in the *Incidents* menu where you can search existing or create new **Field Contacts**. To view a Field Contact you must first search for the record.



Click **Search Field Contact** menu option to open the search form and enter the criteria to find and view the appropriate **Field Contact**. For more information on searching, refer to "Search for a Field Contact" on page 410.

Enter or Update Field Contact Details

Whether you are creating a new **Field Contact** record or updating one that already exists, the process of entering the details is fundamentally the same.

Field Contacts data is grouped into various sections: field contact details, notes, locations, people, vehicles, gangs, etc.

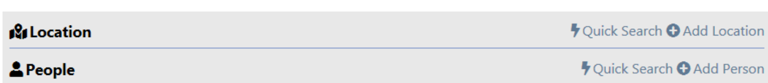
The **Field Contacts** module utilizes *Master Indices*. *Master Indices* are centralized pieces of data that are accessed from different modules of the system for consistency. Each index is represented only once, such as a person, gang, vehicle, and organization.

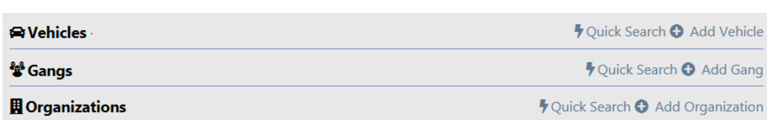
Note: For more information on *Master Indices* refer to "Master Indices" on page 83.

Sections containing **Quick Search** and **Advanced Search** links utilize the *Master Index*. Caliber strongly recommends that you first search the *Master Index* to determine whether or not this data already exists before adding or updating. If the record exists, you must use it in the **Field Contact**. If the record doesn't exist, then you can create it, providing you have the proper permissions. For more information on permissions see your administrator.

Click the **Save** button to save the entered data.

Location, People, Vehicles, Gangs, Organizations



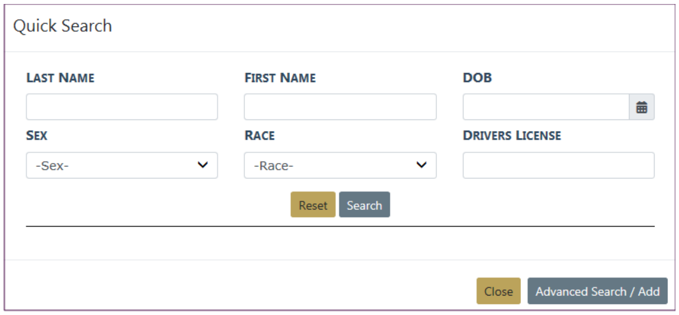


There are two types of searches:

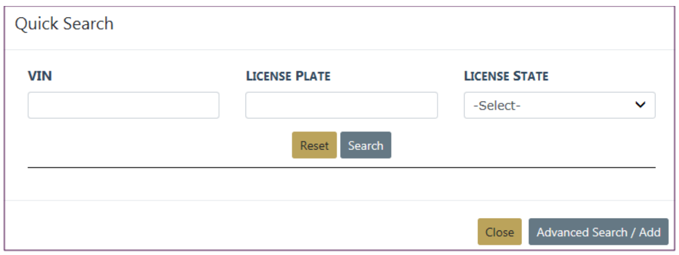
Quick Search

- Limited Master Index search. For example, for person you can only search by last name, first name, DOB, sex, race, and driver's license number.

  Person Example



Vehicle Example



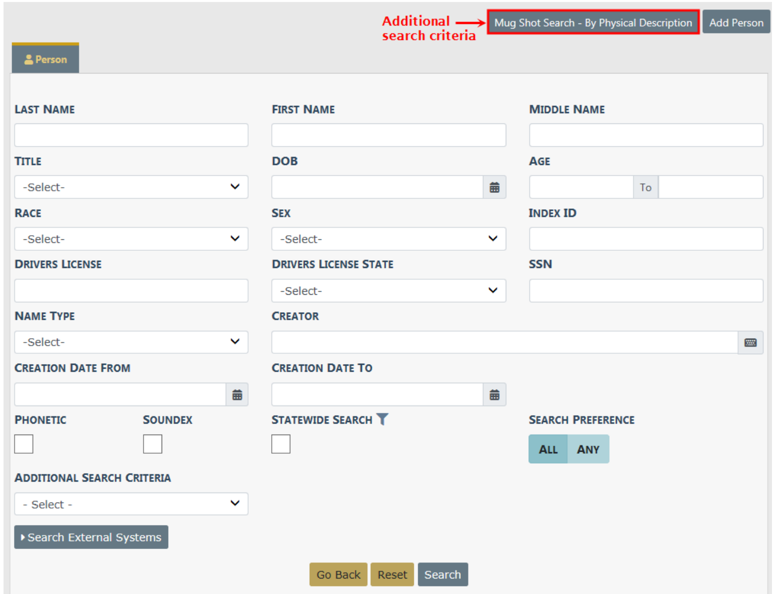
Advanced Search

To perform an advanced search, click on the **Advanced Search/Add** button at the bottom right of the Quick Search window .

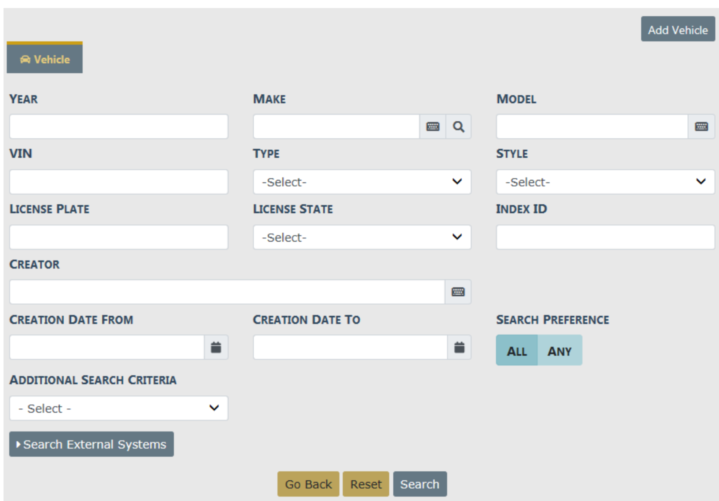
- Extensive Master Index search. For example, in addition to the Quick Search criteria for person, you can also search by age, middle name, physical features, age range, and more.

- This feature also allows you to add new *Master Index* records if they don't already exist, providing you have the proper permissions. See your administrator for more information.

Person Example



Vehicle Example



Officers

Click **+Add Officer** to open Quick Search and select additional officers.

Attachments

Click **+Add Attachment** to attach files or images. For instructions, refer to "Add Attachments" on page 69.

Click **+View External Attachments**, if applicable.

Incidents

Click **+Add Incident** to search for and select an existing Incident to associate with the Field Contact record.

Click **+Create Incident** to create a new incident and associate it to the Field Contact record.

- When prompted, click **Yes** to continue or **No** to cancel.
- If chose **Yes** to continue, the *Create New Incident Report* wizard steps you through the incident creation process. For more information on creating an incident report, refer to "Create Incident Report" on page 198.

Calls for Service

Click **+Add Call** to search for and select an existing calls for service record to associate with the Field Contact record.

Attached Forms

If applicable to your agency, you can attach a custom form.

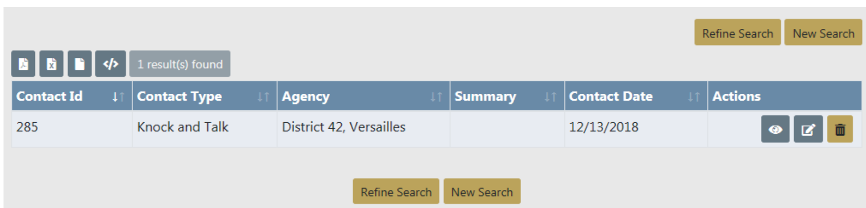
Select an item from the **Add Form** drop-down list to open the chosen form. Complete the necessary fields, then click **Save** to remain on the form, or **Save And Exit** to save the form and return to the Field Contact form. Or click **Cancel** to return to *Edit Field Contact* form without adding a custom form.

Delete a Field Contact

On rare occasions you may need to delete a **Field Contact** record, if you have proper permissions to do so.

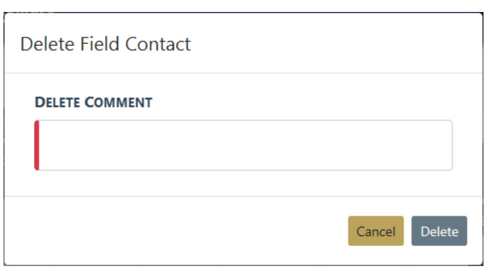
> **Note**: **Field Contacts** can be deleted only by the creator.

1. Search for the **Field Contact** record you want to delete. For more information on searching refer to "Search for a Field Contact" on page 410.
2. The **Field Contact** record you want to delete should appear in the Search Results window.



The **Delete** Icon in the *Actions* column allows you to **Delete** the record listed. If the delete icon does not display, then it is likely you do not have permissions to delete it. For more information on permissions, refer to your administrator.

3. Click the **Delete** Icon on the record you want to delete.
4. Enter **Delete Comment** then click **Delete**.



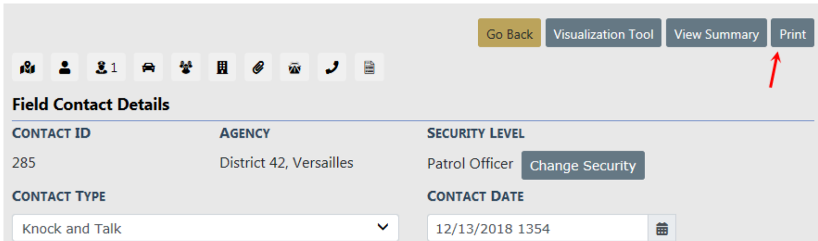
Print Field Contacts

You can print a Field Contact you are viewing or editing.

For more information on editing a Field Contact refer to "Edit a Field Contact" on page 412.

For more information on viewing a Field Contact refer to "View a Field Contact" on page 414.

1. Click the **Print** button while viewing or editing the **Field Contact**.



2. Select the **Print Options** you would like to include, such as images, PDF, or Form attachments.

3. Select **Print**.

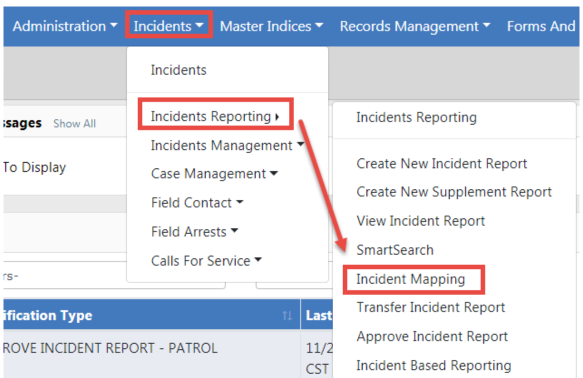
A PDF document opens in a new tab in your browser. Print directly to the printer or save the PDF document giving it a custom filename.

Note: If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

Chapter 21. Incident Mapping

Access Incident Mapping

To access **Incident Mapping**, click on the **Incidents Reporting** drop-down menu on the top *Navigation Bar*, then click on **Incident Mapping**.



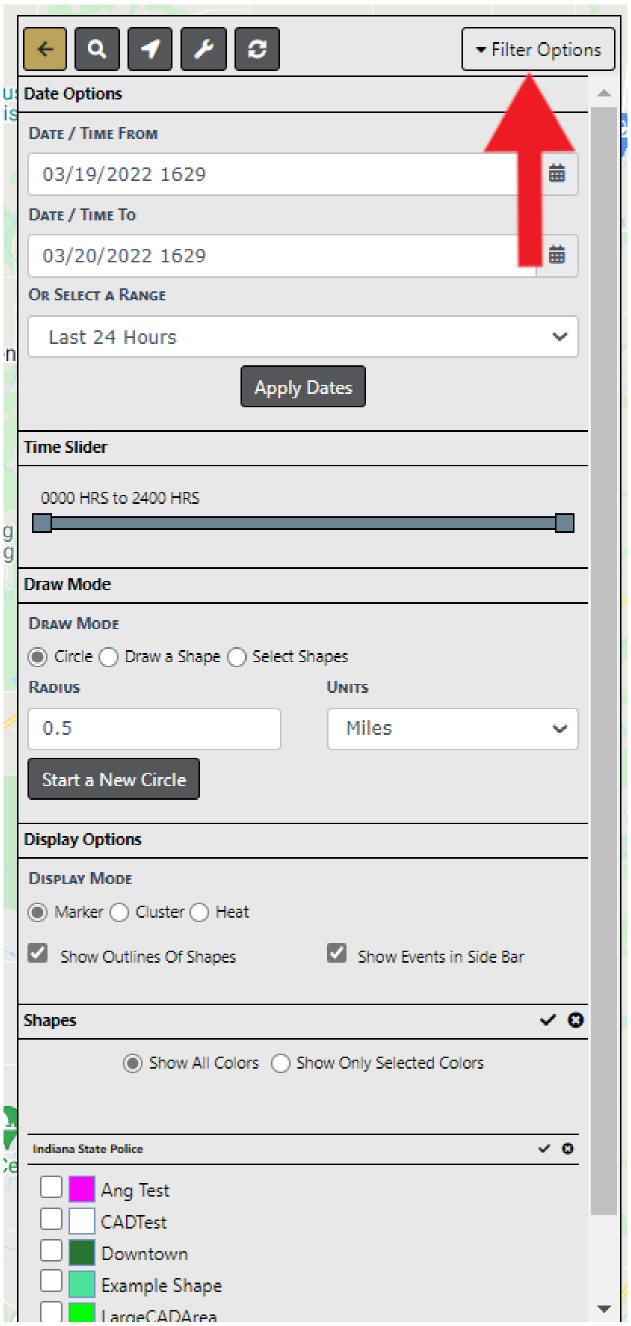
Screen Layout

Incident Mapping contains two windows that overlay the map:

- Filter Options
- Current Query

The *Current Query* displays search results based on the defined *Filter Options*.

Filter Options Window



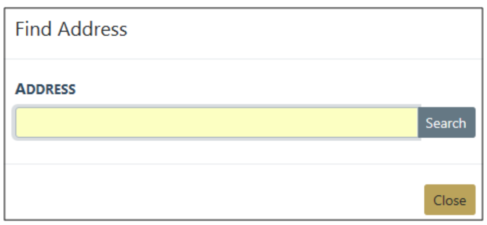
- **Filter Options** - Clicking this button hides the Filter Options window.
- *Date Options* - Select a start date and time and an end date and time. You may also select a date range from the drop-down list, such as *Last 24 Hours*, *Week to Date*, *Last Week*, *Month to Date*, etc. There is also a Time Slider if you want to select just a specific Time range. Click the **Apply Dates** button.

- *Draw Mode* - This allows you to select a *Circle Radius*, *Draw a Shape*, or *Select Shapes*. If you select the *Circle* option, you need to select Radius and Units. The Radius and Units defaults to 0.5 Miles.

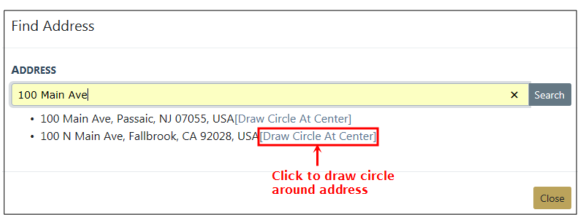
- *Display Options* - These are options on how the search results display.

- *Shapes* - are the Areas to which you want search results to be returned. Check the box next to the applicable areas then click the **Apply Selected Shapes** button when it appears. The **Apply Selected Shapes** button does not display until at least one area box is checked.

- *Search Address* - To search for a specific address, select the magnifying glass icon  on the top of the window to open the search window.

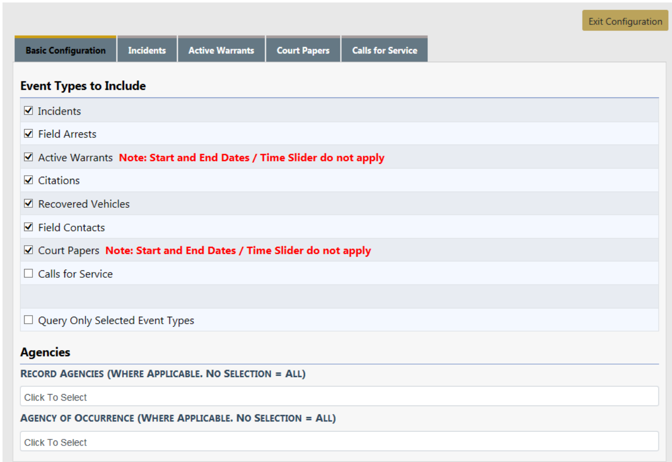
  

  Enter the street address then select the **Search** button or press **Enter** to display a list of matching addresses. Click on the *[Draw Circle At Center]* link if you want to draw a circle on the map around a specific address from the list.

- *Configure* - To configure what and how event types Incidents, Active Warrants, Court Papers, and Calls for Service are displayed on the map, select the **Configure** icon .

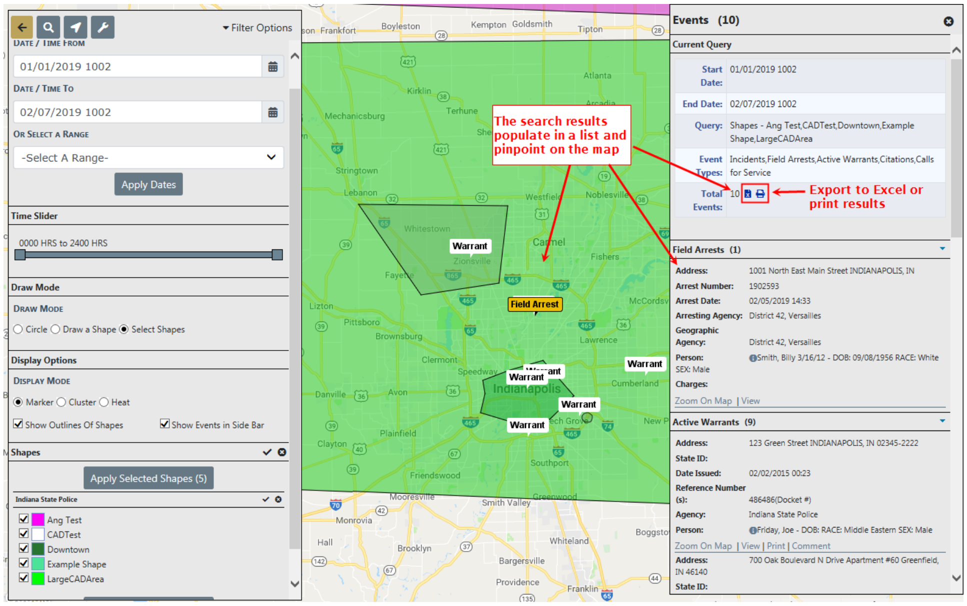
  Your search results reflect what you select in the *Basic Configuration* tab.



After making your selections on each tab, click the **Exit Configuration** button to return to the previous screen.

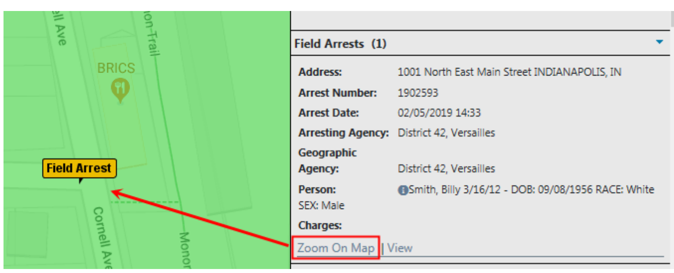
- *Exit* Incident Mappings window. To exit the Incident Mappings window and return to your Home Page, select the **Go Back** icon .
- *Center Map* - To center the Map on the screen, select the **Center Map** icon .
- *Refresh* - Select the refresh icon  to reset the map and query settings.
- *Hide or Unhide Filter Window* - To hide or unhide the Filter Window, select the **Filter Options** button.

Query Window

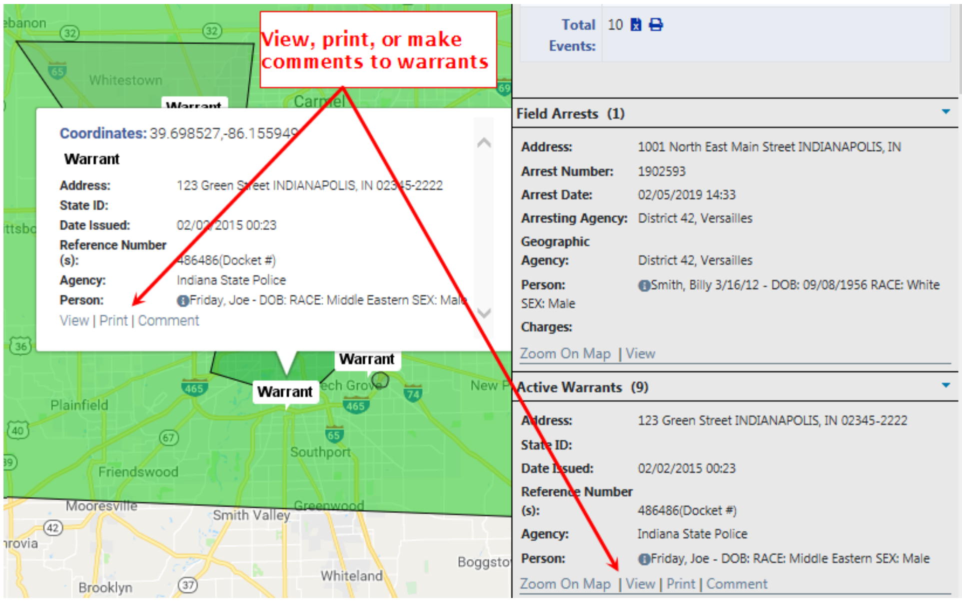


From the *Current Query* section of the **Query Window** you have the ability to print or export the search results to an Excel document.

Click the **Zoom On Map** link to zoom to a specific event on the map.

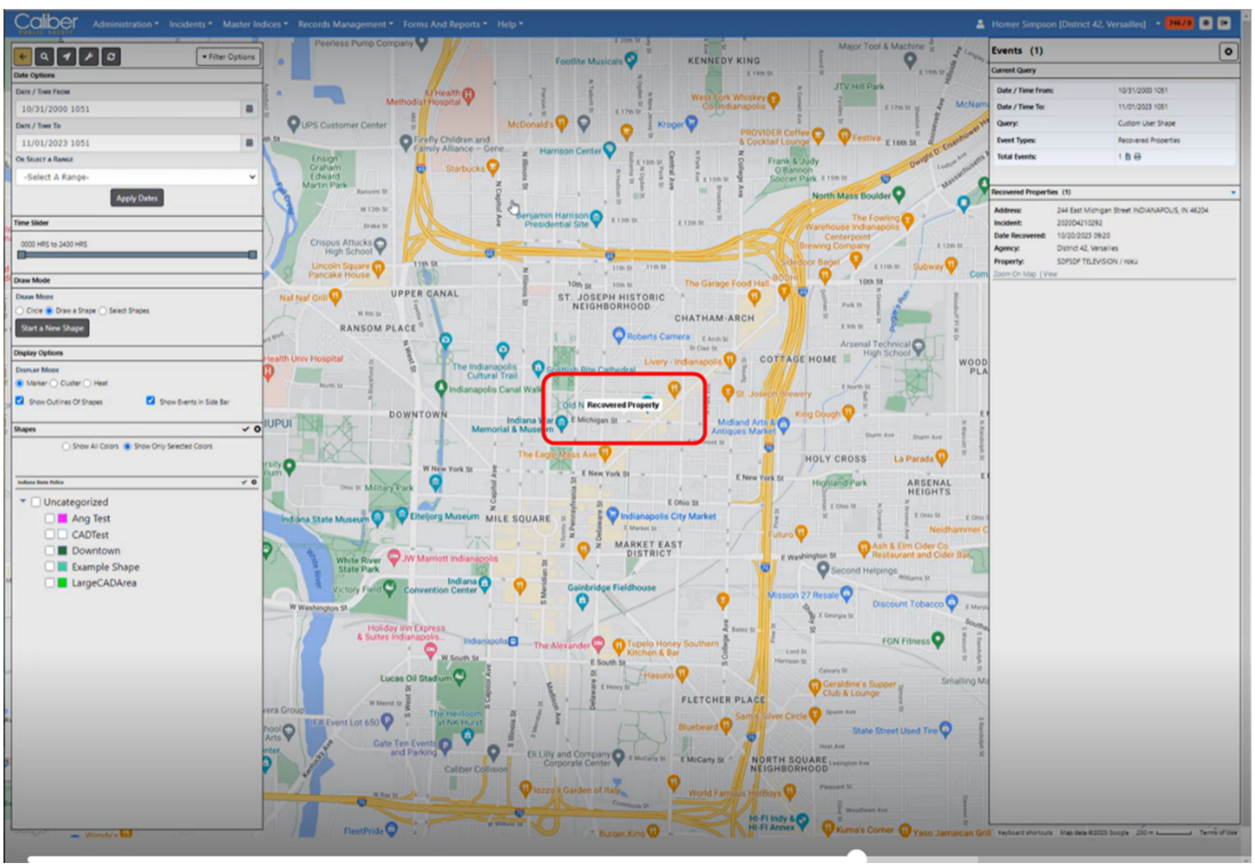


Anyone with permissions to view warrant locations on the **Incident Map** can also view, print and comment directly from the map to the Warrant. You must enter a Log Date and Time, Action Type and Comment. This will be added to the Warrant Log.



Click the **Save** button to commit the comment to the log, or click **Cancel** to abort the log entry and return to the map.

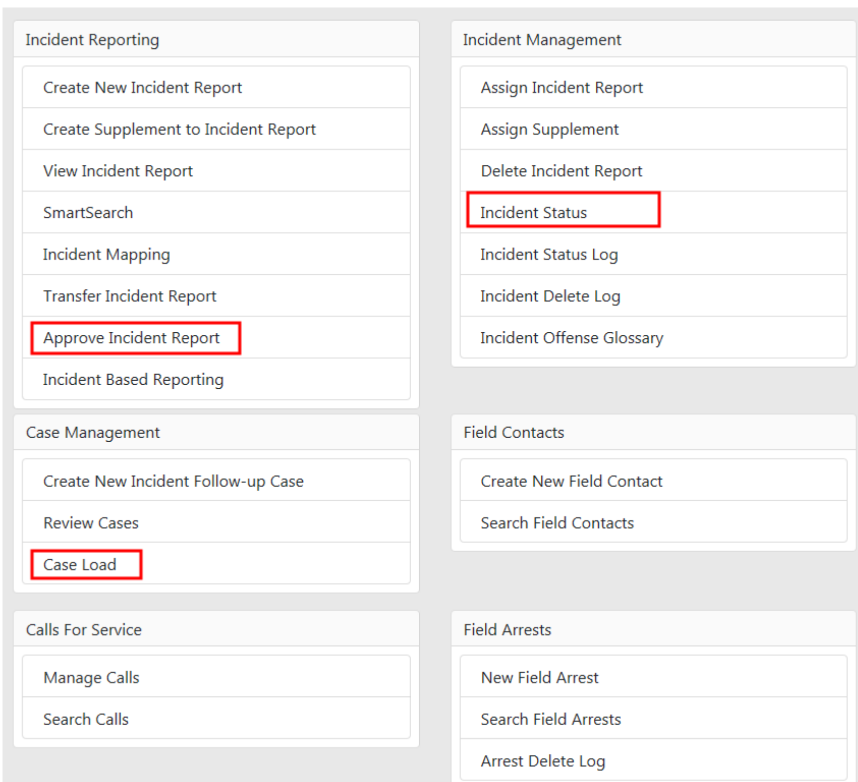
Beginning with RMS 11.14.0, Incident Mapping also includes recovered property.



Chapter 22. Supervisory Functions

Supervisory Function Overview

Users with *Supervisor* rights have more options than the regular user. Most of these added functions will be seen in the Incidents menu. For more information on accessing the Incidents menu, refer to "Incidents Overview" on page 189.



Approve/Disapprove Incident Report

You can initiate the approval process one of three ways:

- Click on *Pending Approval* in **Recent Activities** section, located on the right side of the home page.
- Directly from the **Notification** when Incident Reports are submitted for approval.

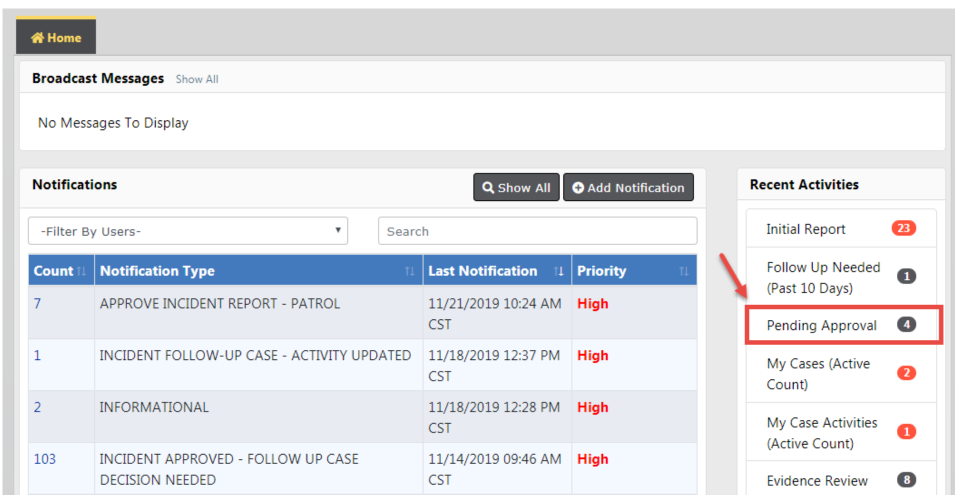
- Directly from the **Incident**.

Note: You can *disapprove* or change the status back to *Initial Status* on approved incidents by way of the Incident Status form. For more information, refer to "Changing Incident Status" on page 276.

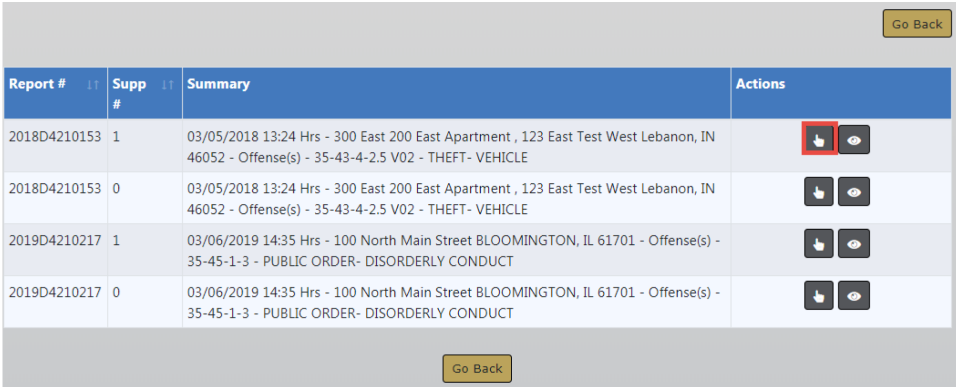
Note: If your agency configures *Review Routing*, a *Secondary Review Route* may initiate additional review opportunities after an incident is approved. With Online RMS 11.6 and above, the reviewer may also include Disapproval Comments during *Secondary Review*.

Initiate from Recent Activities

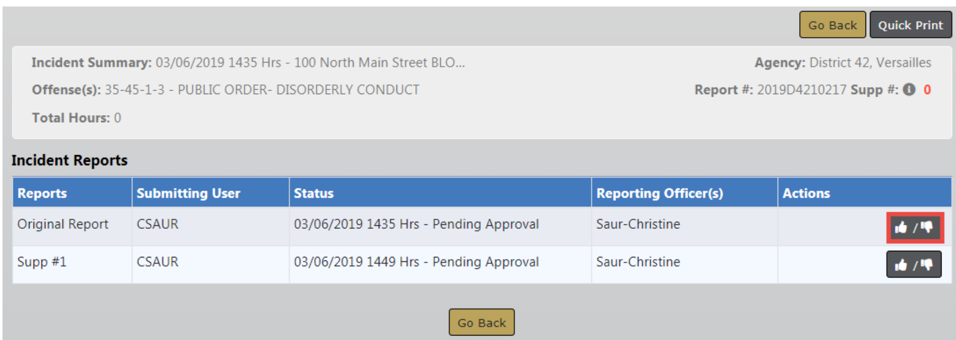
Initiate the incident approval process by clicking on *Pending Approval* under Recent Activities.



Click on the select icon  to select the appropriate incident from the list.



Click the **Approve/Disapprove** button to open the Incident Report.



The Incident Report opens. Continue with the approval/disapprove process. For more information, refer to "Approval/Disapprove Process" on page 432.

Initiate from Notifications

Users with a supervisory role for their agency will receive notifications when Incident Reports are submitted for approval. A supervisor can initiate the approval process directly from the notification.

For more information about accessing notifications, refer to "Notifications" on page 25.

Click on the appropriate notification to initiate the approval process.

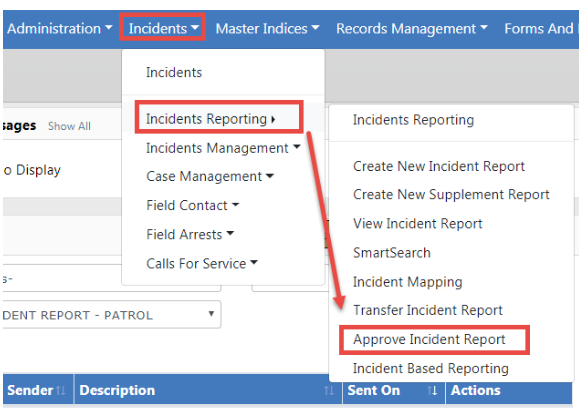
Click on the **Take Action** button.

The Incident Report opens. Continue with the approval/disapprove process. For more information, refer to "Approval/Disapprove Process" on page 432.

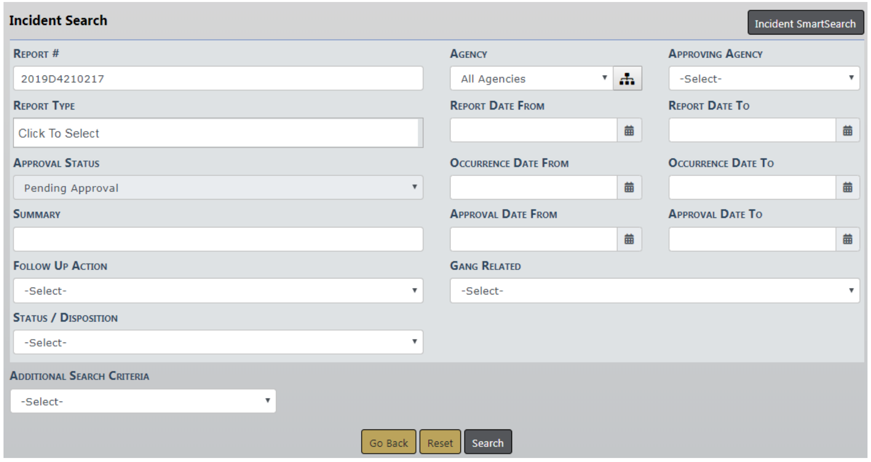
Initiate from the Incident

Users with a supervisory role can also initiate approval directly from the Incident.

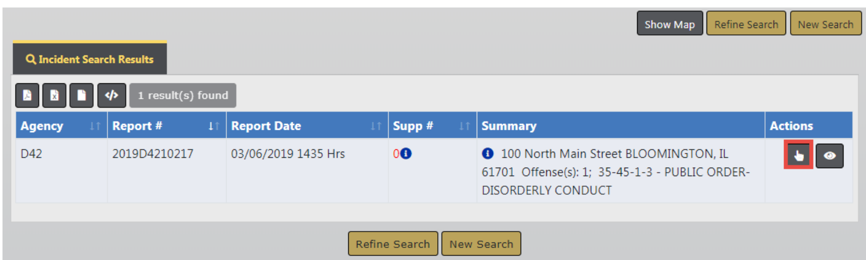
Click **Incidents** on the top navigation bar, click on **Incidents Reporting**, then click on **Approve Incident Report**.



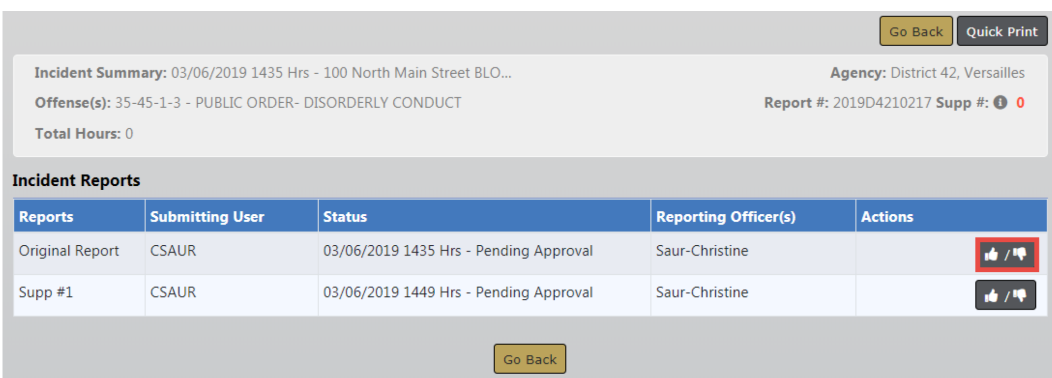
The *Incident Search - Approve Incident Report* screen appears.



Enter the search criteria, click on the **Search** button to display the search results, then click the **select icon** to begin the approval process.



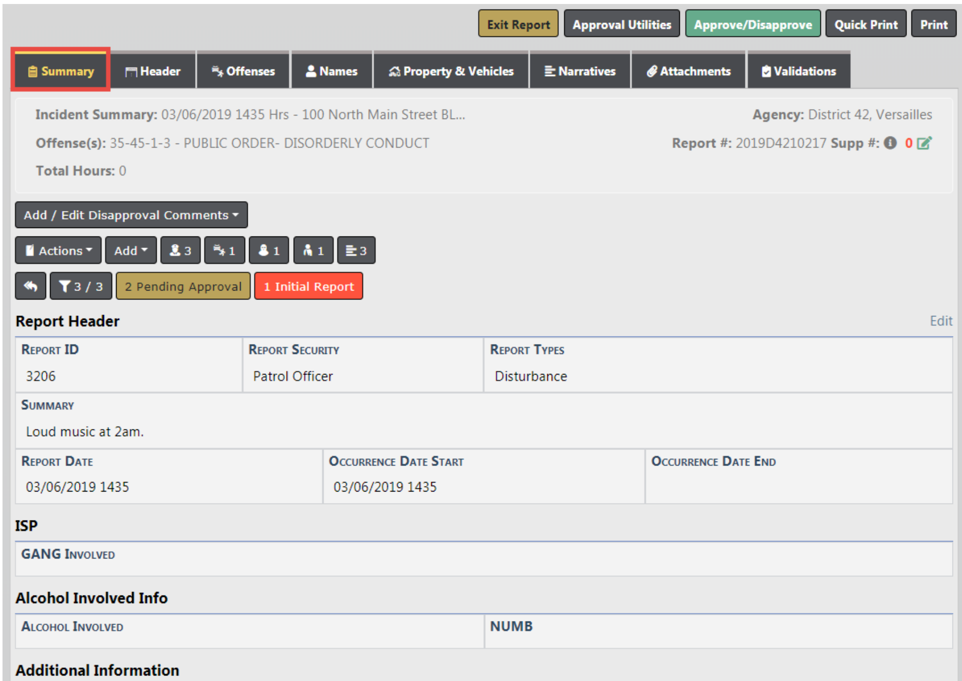
Click the **Approve/Disapprove** button to open the Incident Report.



The Incident Report opens. Continue with the approval/disapprove process. For more information, refer to "Approval/Disapprove Process" on the next page.

Approval/Disapprove Process

After choosing a method to initiate the approval process, the *Incident Approval* screen appears, defaulting on the Summary tab.

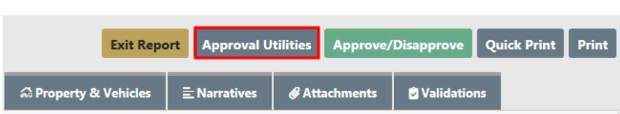


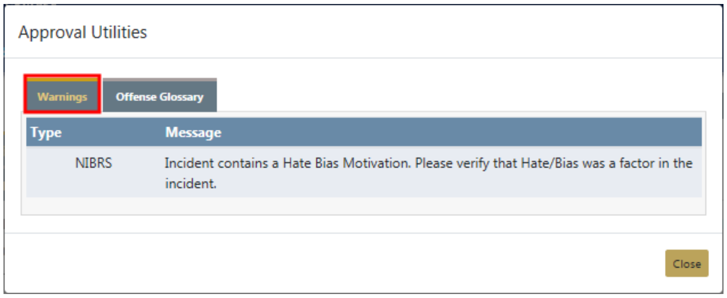
You can perform various functions, such as check for warnings, search for offense or NIBRS codes, add disapproval comments if applicable, and review the incident report. Supervisors can also edit the incident report providing the agency is setup to allow this function.

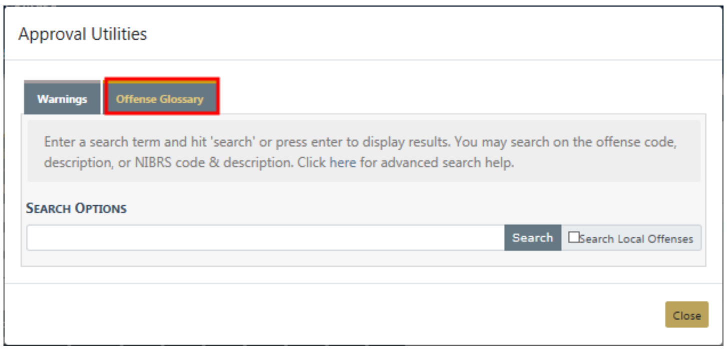
> **Note:** If your agency configures *Review Routing*, a *Secondary Review Route* may initiate additional review opportunities after an incident is approved. With Online RMS 11.6 and above, the reviewer may also include Disapproval Comments during *Secondary Review*.

Approval Utilities

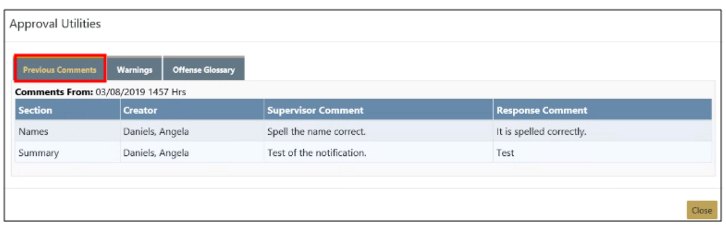
Optionally, click on the **Approval Utilities** button on the top right of the page to view *Warnings* and search for offense or NIBRS codes using the *Offense Glossary*.







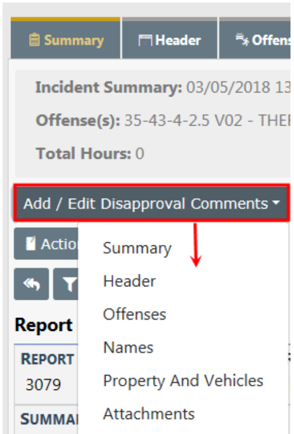
A *Previous Comments* tab appears if the incident report is disapproved at least once. This tab contains comments that are made during the disapproval process.

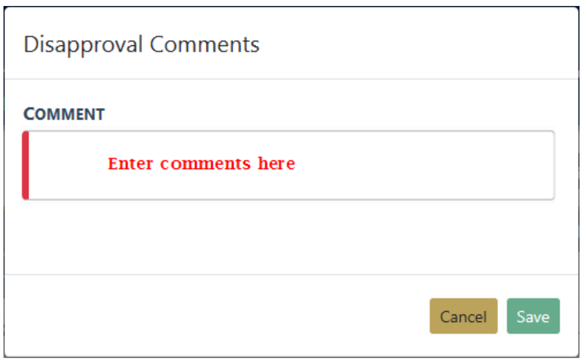


Disapproval Comments

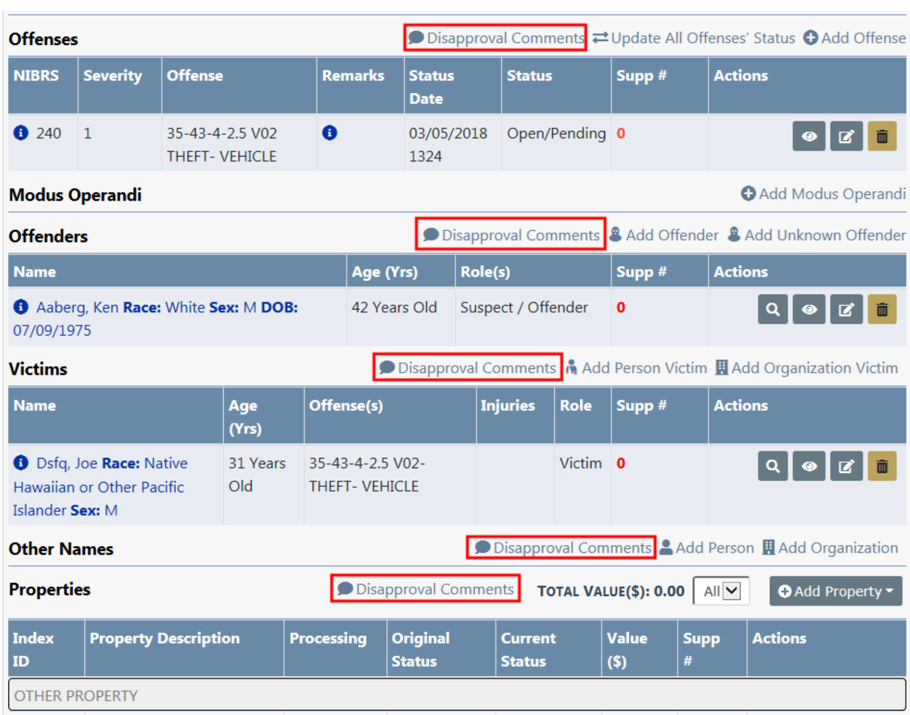
If applicable, you can add disapproval comments to various sections of the incident report two ways.

- Click the **Add/Edit Disapproval Comments**, then select an option from the list to incorporate disapproval comments to various sections. Add your comments then click **Save**.



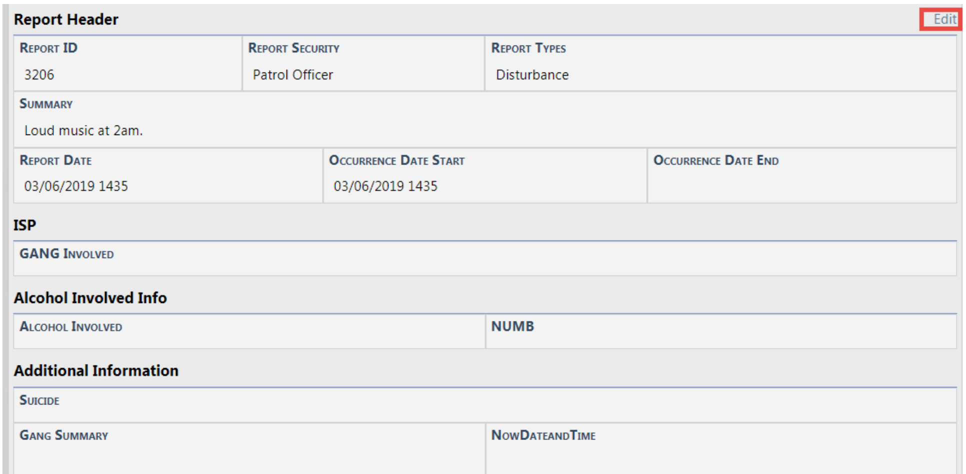


- Or, you can page down and add **Disapproval Comments** to various sections like shown in the example below.



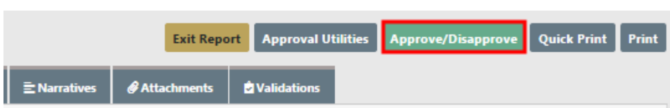
Edit the Incident Report

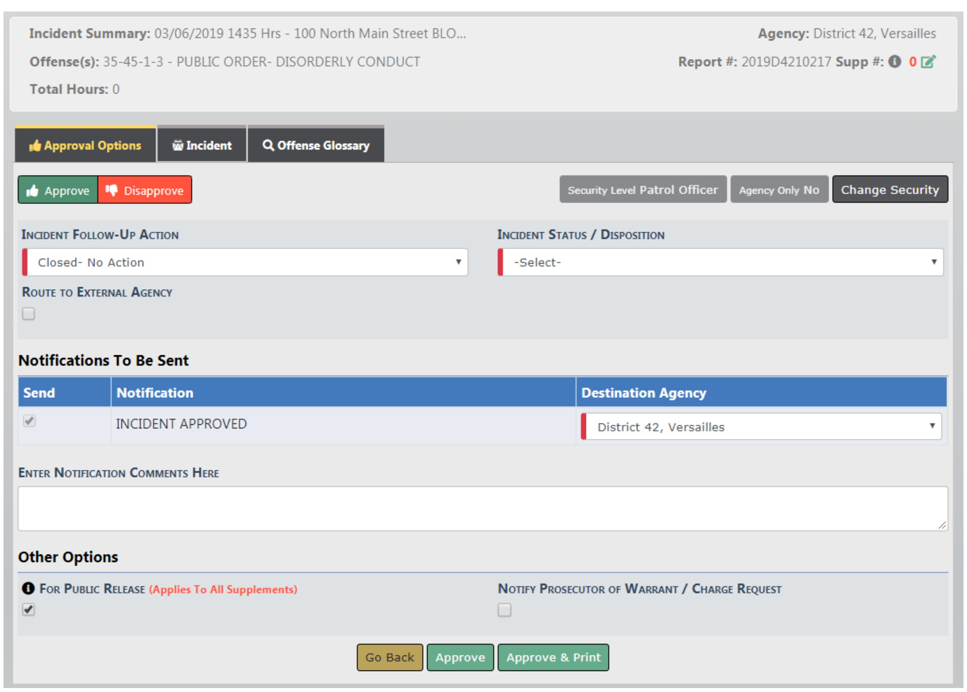
The agency setup dictates whether or not supervisors can edit the incident report during the review process. If supervisors have been granted edit privileges, an **Edit** link appears on the top right of applicable sections.



Finalize the Approval Process

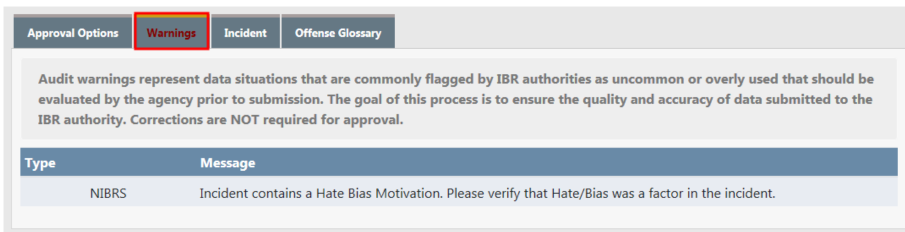
Click on the green **Approve/Disapprove** button on the top right of the incident report to open the *Approve Incident Report*.





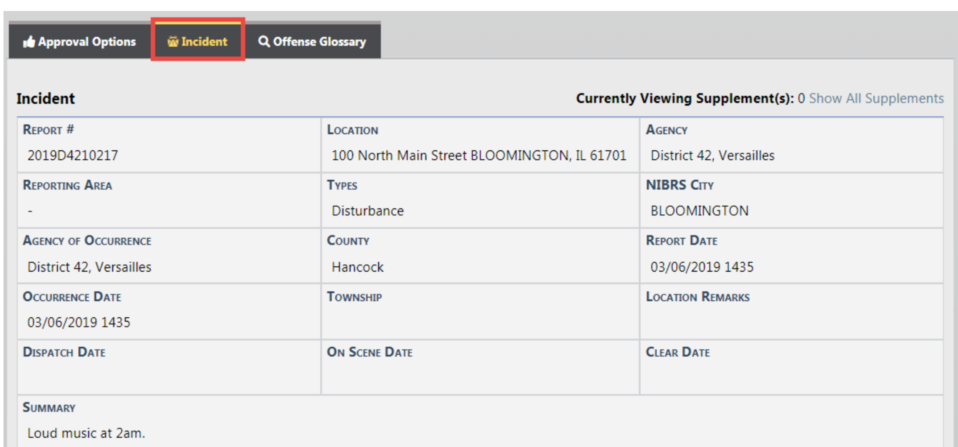
There are four tabs on the *Approve Incident Report* screen:

- Approval Options
  - Contains the necessary options to either Approve or Disapprove. The *Approve Incident Report* screen defaults to this tab.
- Warnings (if applicable)
  - Contains Incident Report validation warnings.

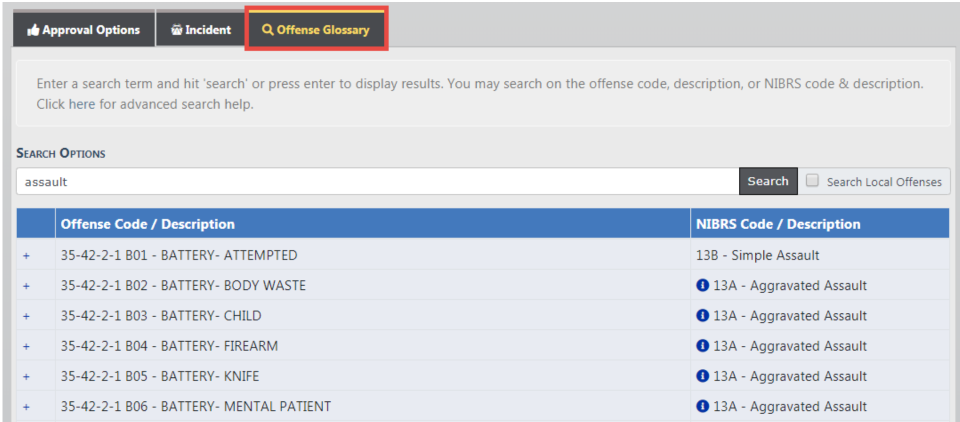


- Incident
  - Incident Report in view only mode.

    The Offenses section includes details for the related NIBRS Offense code, NIBRS Offense Title, and offense description. Hover the mouse over the blue information bubble to view a summary of this information, or click on the blue information bubble to view details.



- Offense Glossary
  - Contains a feature to lookup offenses to confirm accuracy of the offense selected for the Incident Report. Enter the search criteria in the search field provided, then press **Enter** or click **Search** to display a list of NIBRS Codes that contain the entered text.



Approval Options

Depending on your agency's business practice, supervisors may have various options when approving a report:

- Restricting reports to the internal *Agency Only*. The **Route to External Agency** button is gray when the report is restricted to the internal agency, and green when selected to route to external agencies.
- Click on the **Change Security** button allowing for greater internal security among the users within an agency.
- Choose the **Follow-up Action**.
- Choose the **Status/Disposition**.
  - Your agency administrator has the ability to map *Incident Status* codes to *Offense Status* codes to prevent mismatches. During the approval process, if you set an *Incident Status* to something other than what has been mapped to an *Offense Status*, a message appears disallowing that selection and it prompts you to verify the information and make any necessary changes. Refer to your agency administrator for more information.

Note: The Follow-up/Action option you choose drives what Incident Status/Dispositions are available for selection.

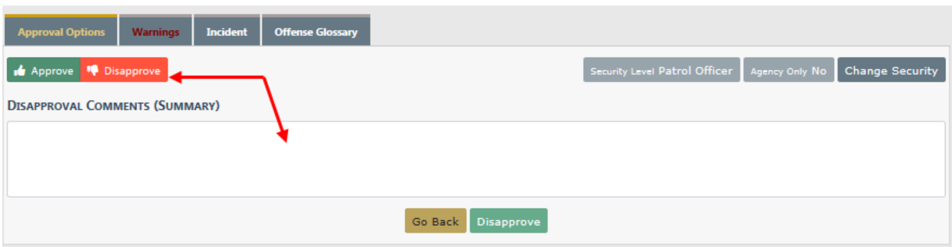
The different options available will depend on the workflow selected for **Case Management** by your agency. The *Notifications to Be Sent* section generates a notification to request a follow-up Case determination in an optional workflow. For more information refer to "Case Management" on page 455.

Make other necessary updates.

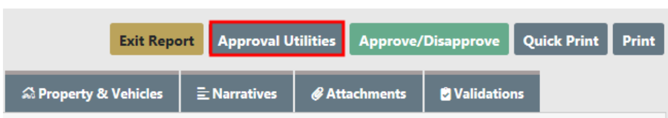
Click the **Approve** button to finalize the approval, or click the **Approve and Print** button to finalize the approval and print.

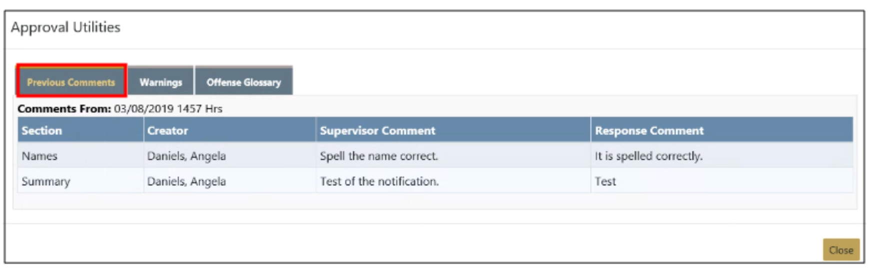
Disapprove

When **Disapprove** is selected, a comments box displays so the supervisor can advise the user of the reason for the disapproval. Enter comments then click the **Submit** button.



The disapproval comments now appear in the *Previous Comments* tab in Approval Utilities.



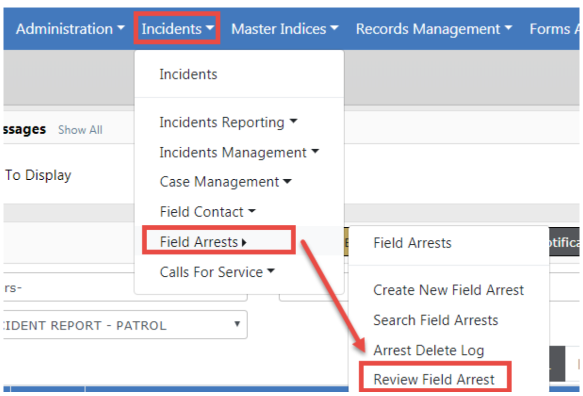


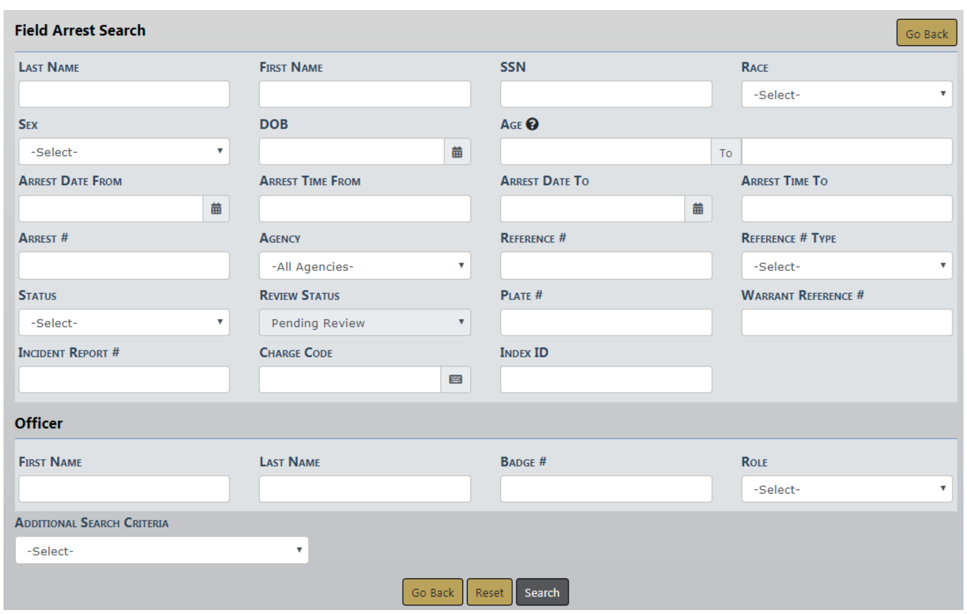
Approve or Disapprove Field Arrests

As an Officer Supervisor for your agency, you receive notifications when officers submit **Field Arrests** for approval. You can initiate the approval process one of three ways:

- Click on the new *Notification* link to view the Notification, then click the **Take Action** button to open the **Review Field Arrest** form. For more information on Notifications refer to "Notifications" on page 25.
- Directly from the notification by clicking on the select icon under the Actions column.

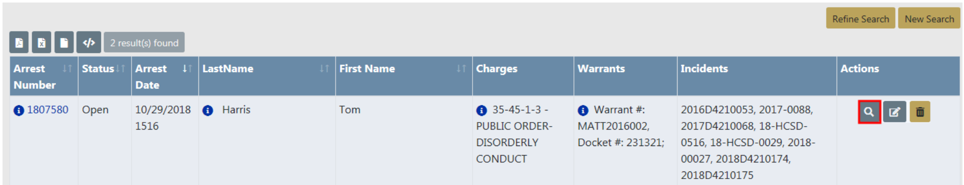
- Or select the **Review Field Arrest** link from the **Incidents** menu, then search for Field Arrest record.

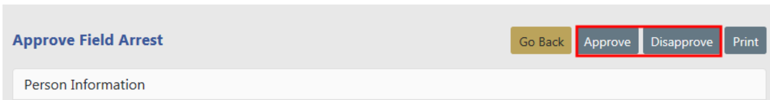




Search for the **Field Arrest** record by entering the information you know about the arrest, then click the **Search** button to display a list of Arrests from which to choose.

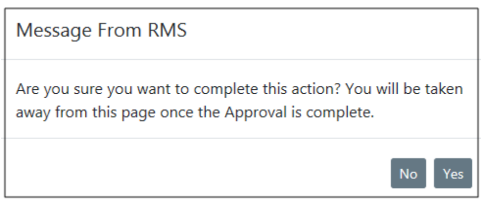
- Click the **Review** icon to *Approve* or *Disapprove* the **Field Arrest** record.





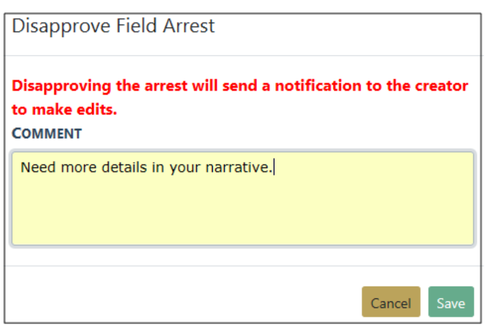
Approve

Click the **Approve** button on the **Approve Field Arrest** screen, then click **Yes** in the confirmation window to approve.



Disapprove

Click the **Disapprove** button on the **Approve Field Arrest** screen, then enter **Comments** and click **Save**.



The creator of the **Field Arrest** will receive a **Disapproved** notification.

Approve or Disapprove Criminal Complaint

Approval Levels

The agency has the option to utilize a 1 or 2 level approval:

1-Level Approval Process

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

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

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

2-Level Approval Process

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

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

The supervisor approves the complaint.

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

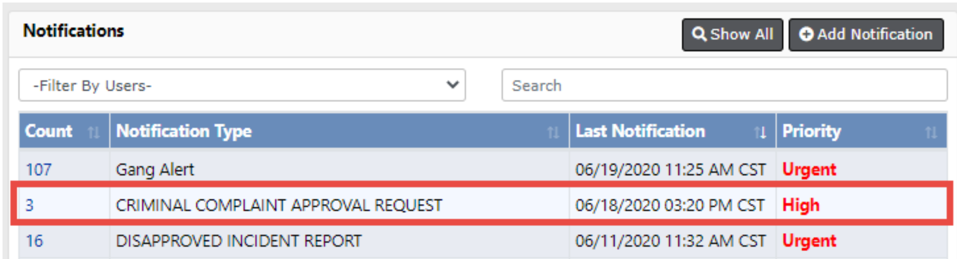
The court officer submits the approved complaint data to the court.

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

For more information on **Maint Value** settings, refer to the Maintenance Values chapter of the *Caliber Online RMS Administrator Guide*.

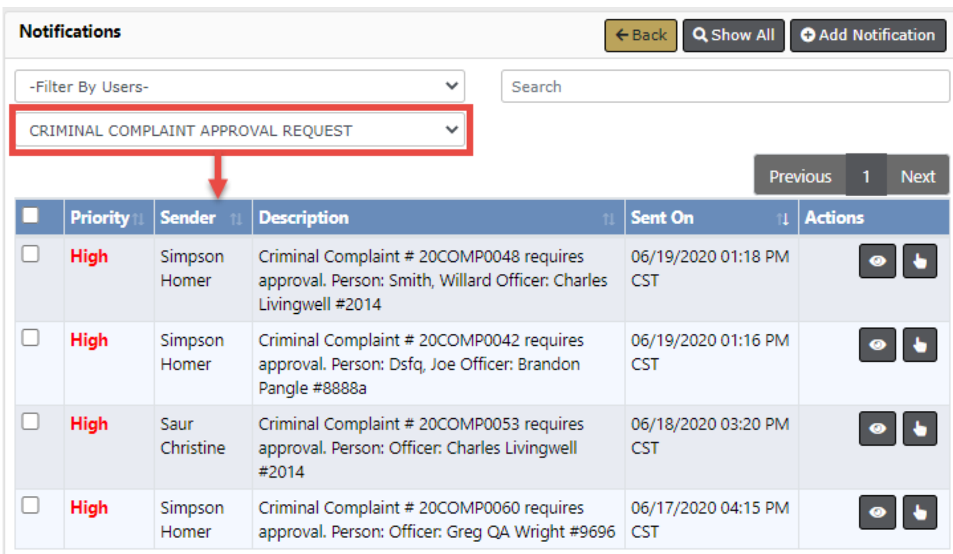
Approve the Complaint

If you have permissions to approve Criminal Complaints, you receive *Criminal Complaint Approval Request* notifications when users submit Criminal Complaints for approval.



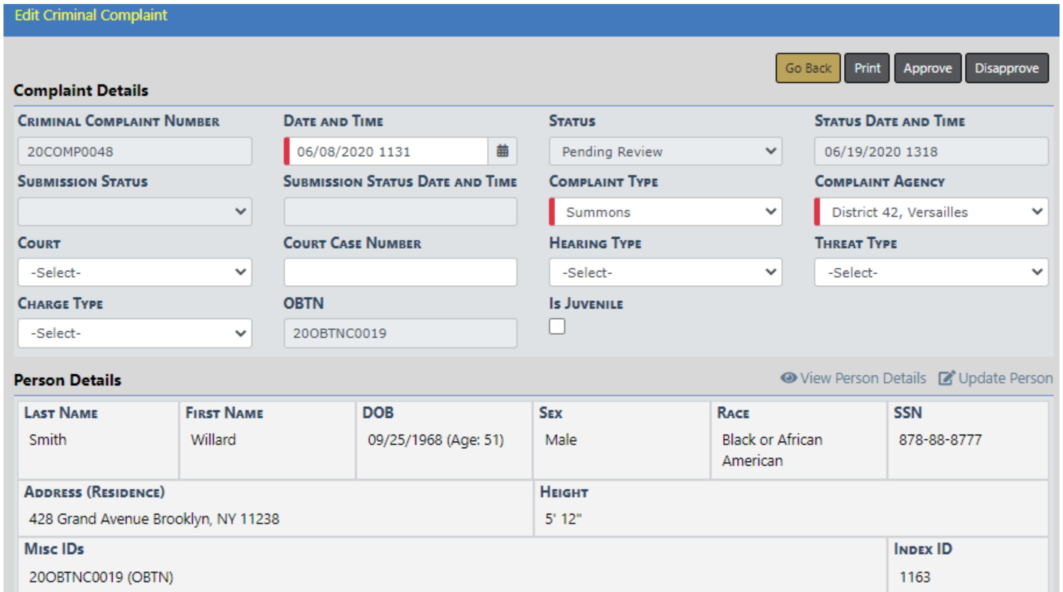
For more information on Notifications refer to "Notifications" on page 25.

1. Click on the **Count** in the first column of the notification to view all *Criminal Complaint Approval Requests*.



2. Click the **Select icon** on the Criminal Complaint record you want to review.

3. The *Edit Criminal Complaint* form opens.



The approval action buttons that appear on the top right of the screen vary based on your permissions, the approval level defined by your agency, and the complaint status.

You may see one or more of the following: **Approve**, **Approve & Submit**, **Submit**, **Disapprove**. Refer to the next step for details.

4. Review the complaint then finalize the approval by following the appropriate approval level defined by your agency:

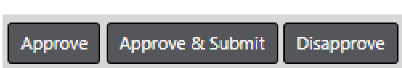
   - 1-Level Approval Process
   - 2-Level Approval Process

   For more information on approval levels, refer to "Approval Levels" on page 441.

   For more information on updating the Criminal Complaint, refer to “Edit a Criminal Complaint” on page 320.

1-Level Approval Process

1. The officer supervisor performs one of the following actions:



   - **Approve** - Approve the complaint.

- A brief green *Success* message appears across the top of the screen when the approval is successful. If it is not successful, a red *Failed* message appears across the top.

- Upon success, a **Submit** button replaces **Approve & Submit**, allowing you to submit to the court as a separate step later.

- Upon success, the approval process changes the Criminal Complaint status to *Approved*, and the **Approve** button no longer appears.

- If the Court Case feature is turned on for your agency and the approval is successful, the process generates a Court Case record and displays it on the complaint.


Court Case

Court Case ID	Court Case Number	Status	Filed Date	Actions
35		Filed	06/23/2020 1026	

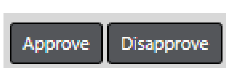
Note: The officer manually enters the **Court Case Number** after the Criminal Complaint is submitted and accepted by the court. The court provides the **Court Case Number**.

- **Approve & Submit** - Approve the complaint and submit the data to the court as a single action. For more information on **Submit**, refer to "Submit to Court" on the facing page

- **Disapprove** - Disapprove the complaint. For disapprove instructions, refer to #disapprove.

2-Level Approval Process

1. The officer supervisor receives notification to approve or disapprove the complaint.



- **Approve** - Approve the complaint.

  - A brief green *Success* message appears across the top of the screen when the approval is successful. If it is not successful, a red *Failed* message appears across the top.

  - Upon success, the approval process changes the Criminal Complaint status to *Approved*, and the **Approve** button no longer appears.

- If the Court Case feature is turned on for your agency and the approval is successful, the process generates a Court Case record and displays it on the complaint.

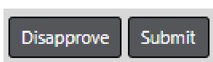
Court Case

Court Case ID	Court Case Number	Status	Filed Date	Actions
35		Filed	06/23/2020 1026	

Note: The officer manually enters the **Court Case Number** after the Criminal Complaint is submitted and accepted by the court. The court provides the **Court Case Number**.

- **Disapprove** - Disapprove the complaint. For disapprove instructions, refer to #disapprove.

2. If approved by the officer supervisor, the court officer receives notification to submit the data to court. The court officer also has the option to disapprove the approved complaint.



- **Submit** - Submit the complaint data to the court. Refer to "Submit to Court" below.
- **Disapprove** - Disapprove the approved complaint. For disapprove instructions, refer to #disapprove.

Submit to Court

The behavior varies slightly, depending on whether your agency is utilizing **1-Level Approval Process** versus **2-Level Approval Process**.

If your agency is utilizing **1-Level Approval Process**:

1. Click the **Submit** button or **Approve & Submit** button on the complaint, whichever applies to your agency.
   - If submission is **successful**, a brief message appears across the top of your screen in green and the *Submission Status* on the Criminal Complaint changes to *Submitted* automatically.
   - If submission is **unsuccessful**, the *Submission Status* on the Criminal Complaint changes to *Submission Error* automatically. Review and update the Criminal Complaint as needed, then resubmit.

If your agency is utilizing **2-Level Approval Process**:

1. The court officer receives notification to submit the complaint data to the court.
2. Click **Submit** on the complaint.

For more information on the different approval levels, refer to "Approval Levels" on page 441.

Disapprove

1. Click the **Disapprove** button on the *Edit Criminal Complaint* screen, then enter **Comments** and click **Save**.
2. The creator of the Criminal Complaint receives a **Disapproved** notification. The user has the option to take action, including resubmitting for approval.

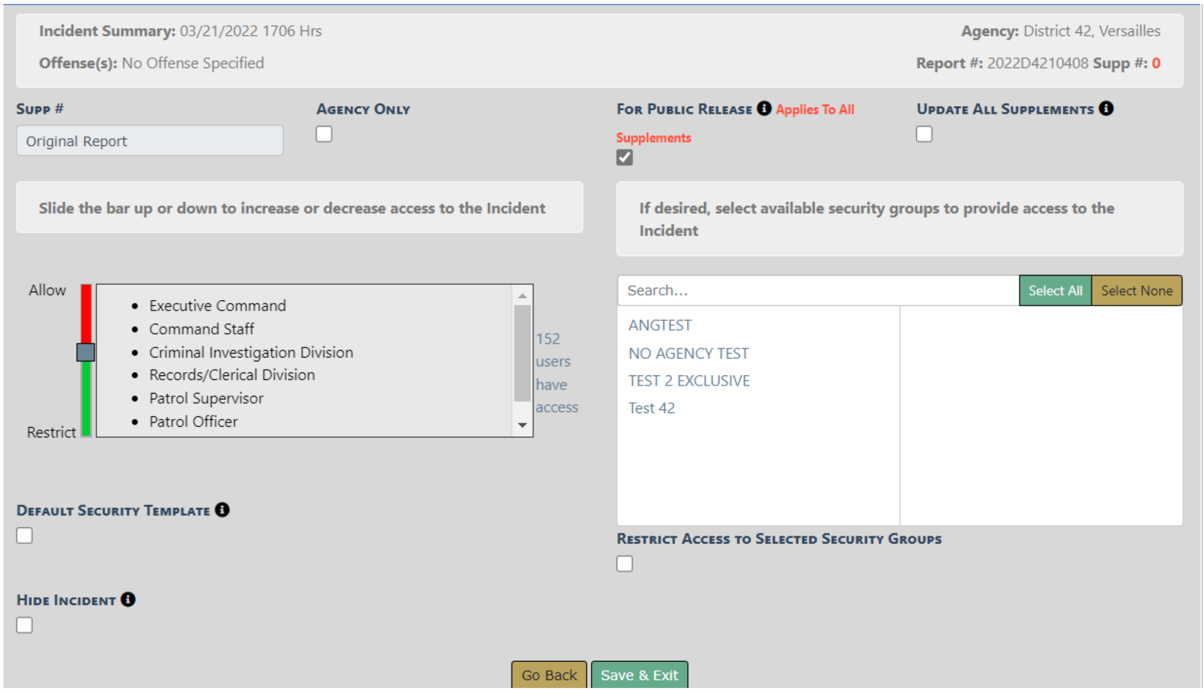
   For more information on users taking action, refer to " Take Action on Disapproved Notifications" on page 331.

Incident Security

The default security for **Incident Reports** is set at the Patrol Officer level. This means anyone with Patrol Officer Security rights and above can access these reports. It is understood that some **Incident Reports** will be of a more sensitive nature and may require a higher security level to minimize the number of users that have access to the report. The security of an **Incident Report** can be done by clicking on **Change Security** from the **Incident Approve/Disapprove** screen.

Report Type	Date	Reporting Officer	Supplement Owner	Approval Status	Security Level	Actions
Original Report	12/13/2018	Christine Saur #SAUR111	Christine Saur	Initial Report	Patrol Officer	

The **Incident Security** screen can also be accessed at any time through the **Incident Status** screen by clicking on the *Security* icon.



Agency Only- Selecting this button will restrict the **Incident Report** to users at your agency only.

For Public Release- Clicking the button to turn it gray will cause NOT FOR PUBLIC RELEASE to be printed across the top of the **Incident Report**.

Update All Supplements - Selecting this button updates all supplements you have access to.

Incident Security Levels- A user can set the Incident's security level at a level equal or less than their security rights. This means other users at that level or above would have access to the report across all agencies (unless the *Restrict to Agency Only* is selected).

Security Groups- Available security groups can be selected which will allow any user in the selected group to have access regardless of their individual security level. If *Restrict Access to Selected Security Groups* is selected, the **Incident Report** can only be accessed by members of the selected Security Group.

Default Security Template- When this checkbox is checked, future supplements will have the same security level, workgroups, and agency-only flag as this supplement.

Hide Incident - Only displayed for authorized users. If checked, the incident is not visible except to users within the incident security level.

Incident Management

Assign Supplement

Supervisors can create a *Supplement* to an Incident Report and assign it to another user.

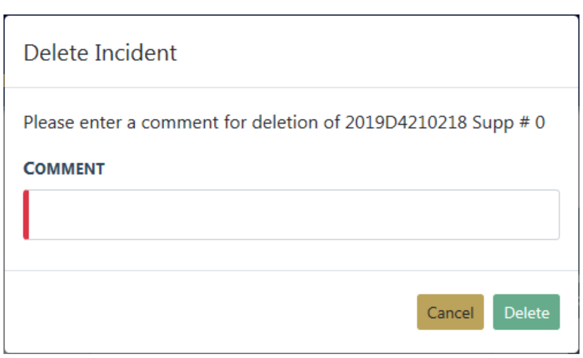
- Click **Assign Supplement** in Incidents menu.
- Search for and select the Incident to which you wish to create the **Supplement**.
- Click **Assign Supplement** at bottom of page.
- Enter the **Reporting Officer** you want to assign.
- Click **Assign Officer** at bottom of page.
- You will be prompted to create a comment for the officer.
- Click **Assign** at the bottom of page.
- The officer will receive a Notification regarding assignment.

  Note: Beginning with RMS 11.15, supplements can be assigned from the Incident **Action** menu from the *Summary* tab.

Delete Incident Report

Reports can be deleted by users who have ownership of the report or by Supervisors.

Once a report is selected, the user can delete the report. A confirmation screen appears and users are required to give a reason for the deletion.



Note: Reports that are deleted are not recoverable from the database.

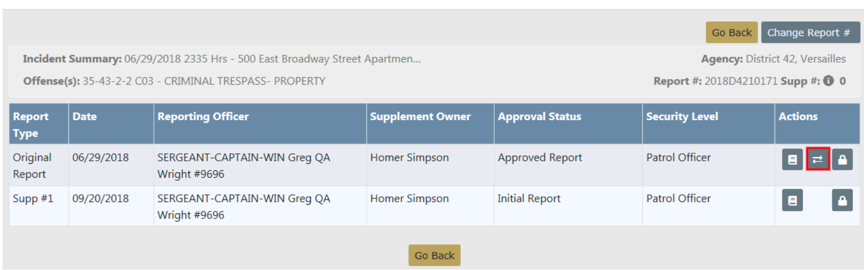
Incident Status

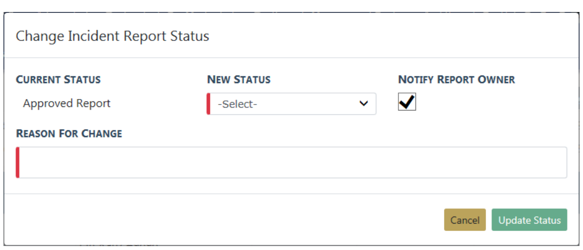
Users can view the status of a report from this location. The different report statuses are:

- Initial Report
- Pending Approval
- Approved Report
- Disapproved Report

Supervisors can use this section to change the status of a report from *Approved Report* to either *Initial* or *Disapproved* status to allow the user to edit the report. Every change in a report's status is tracked in the **Status History**.

From the Incident Status screen, click on the Change Status icon.





Select a new status from the drop-down menu and enter the reason for the change, you also have the ability to select to notify the report *Owner of the Status Change*.

Incident Status Log

This area is where users can search for an incident and obtain a *History* of the status changes and/or updates for any report.

Incident Delete Log

Deleted reports are listed in a report log with all the pertinent information for the report, including the required reason for the deletion.

Report #	Supp #	Agency	Deletion Comment	Deleted By	Deleted Date
2017-0014	0	District 42, Versailles	Testing delete	Simpson, Homer	04/19/2017
2012ISP0000019	0	District 42, Versailles	Test	Simpson, Homer	06/21/2012
2012ISP0000021	0	District 42, Versailles	Test	Simpson, Homer	06/21/2012
2012ISP0000022	0	District 42, Versailles	Test	Simpson, Homer	06/21/2012
2012ISP0000020	0	District 42, Versailles	Test	Simpson, Homer	06/21/2012
2012ISP0000023	0	District 42, Versailles	Test	Simpson, Homer	06/21/2012
2012ISP0000018	0	District 42, Versailles	TEST	Simpson, Homer	06/15/2012

Note: Remember that deleted reports cannot be recovered.

Using Charts to Visualize Data

Charts provide a mechanism to users to visualize data in a quick and efficient manner right from the home page. There are two different types of charts we offer

- **Non-interactive** image charts which appear right on the home page,
- A menu of **Interactive** charts which can be accessed on the right side bar.

Home Page Image Charts

These charts are not interactive and are meant to give a very quick summary of data. As of our current release, they include:

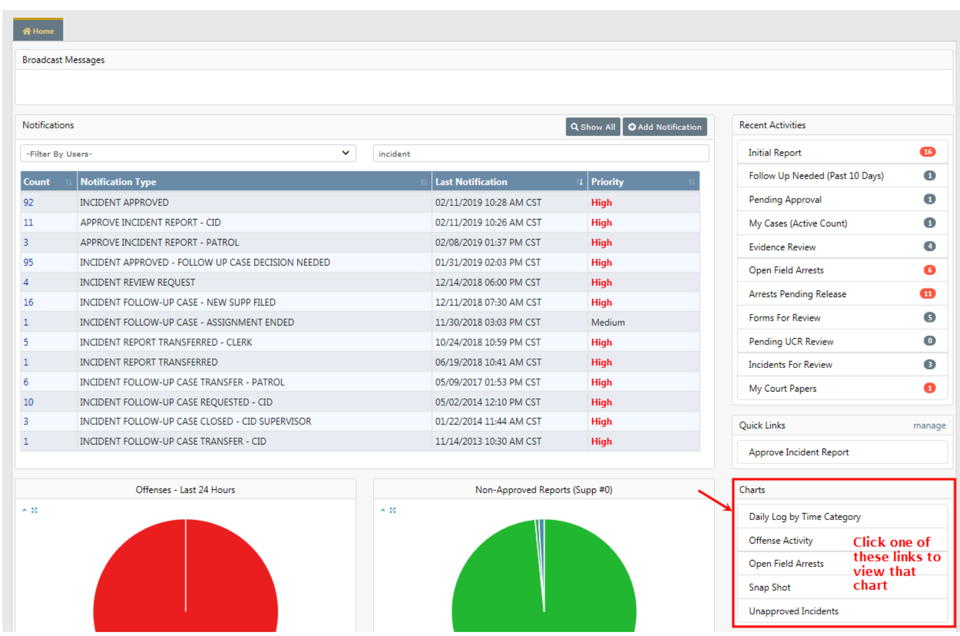
- *Offenses - Last 24 Hours*- This is a pie chart which summarizes offense in the last 24 hours. The offenses are grouped according to their NIBRS codes to offer simple categories such as larceny, assault, etc... Note that this chart's functionality is expanded in the interactive charts Offense Activity and Snap Shot, which are described below.

- *Non-Approved Reports* - This pie chart shows counts of all initial incident reports (Supp 0) which are not approved (i.e. either in initial status, pending approval, or disapproved). A more interactive version is available in the interactive charts, described below.

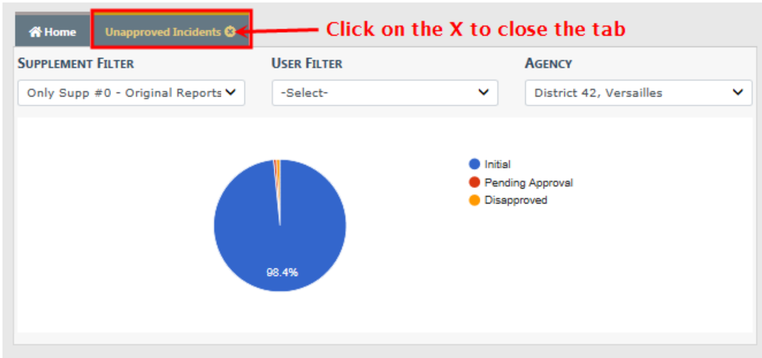
Above is an example of how the image charts are shown on the Online RMS home page

Interactive Charts

Interactive Charts are accessible from the right side bar of the home screen. Look for the section labeled **Charts**.



When you click on a chart link, a new tab opens on the home page to display that chart. Click on the **X** to close the tab.



Some charts have controls such as date ranges to allow you to customize the data you want to see.

Various **Interactive Charts** are available.

- Daily Log by Time Category
- Offense Activity
- Open Field Arrests
- Snap Shot
- Unapproved Incidents
- Calls for Service

Offense Activity

This chart displays offenses, by count, for various date ranges, and even allows you to display offense counts based on the time of day. The **Select a Display** select box allows you to choose what date range you want for visualizing data. It will either display a daily or monthly view depending on which range is selected. For example, the week to date option would show a daily view; however month to date & last month has far too many days to make sense on a graph, so it is shown in a monthly view.

You can also select **Show Results by Time of Day** to change the display to group offenses based on the time of day the occurred. The time of day is split up into four hour intervals starting from midnight.

The **Agency** filter is available for multi-tiered agencies to view events at the top organization level for all agencies, or an individual agency beneath the parent organization.

Regardless of the display you select, results will be shown in color coded *Stacks*, with a legend at the bottom indicating what colors represent what offenses. You can hover the mouse over a particular section to show the offense type & count, and you can click on a section to bring up a list of actual Incident Reports containing those offenses on that date / time.

When viewing the incidents, you can click on the **Quick Tab** icon in the *Actions* column to open another tab which will give you a summary for that Incident Report. This is similar to the Incident Summary Page, but is presented in a view-only manner to give you quick access to the report.

Open Field Arrests

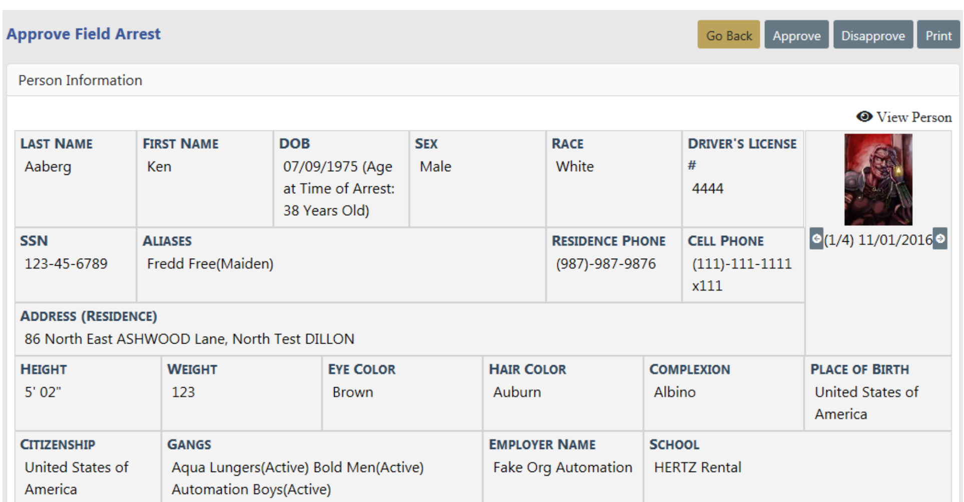
This bar chart identifies Arrests that are in *Open* or *Pending Review* status.

As a Officer Supervisor you can open the **Field Arrest Chart** and drill down to the details to either approve or disapprove the **Field Arrests**.

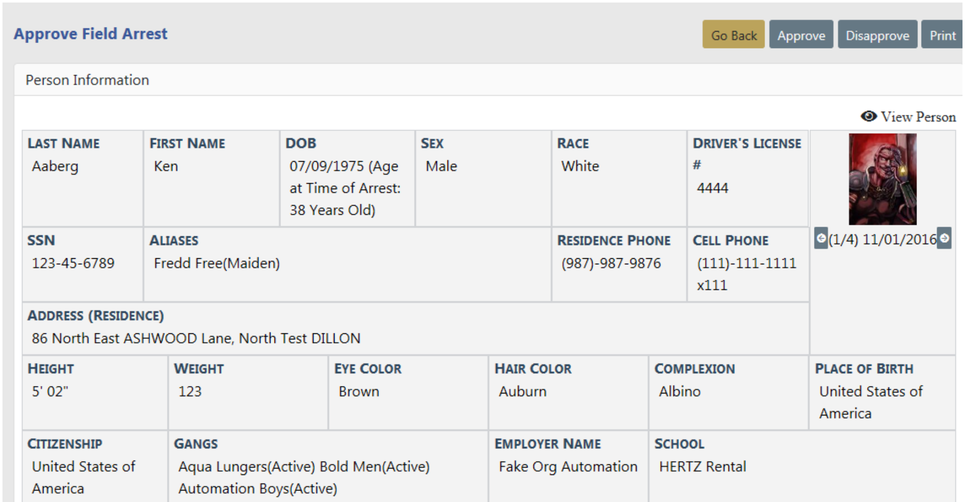
Hover your mouse over the blue boxes to see a total count, and click the blue boxes to display details of those counts in the bottom grid.

Click on the icons to the right to *view* or *review* an entry in the bottom grid. If an icon does not display, then you do not have access to that function.

- The **View** icon opens the *View Field Arrest* form. For more information on the disapproval process refer to ApproveDisapproveFieldArrest.htm



- The **Review** icon opens the *Approve Field Arrest* form, where you can *Approve*, *Disapprove*, or *Print* the **Field Arrest**. For more information on the approval process refer to ApproveDisapproveFieldArrest.htm.



Snapshot

This is a by-the-numbers chart which varies based on what features your agency has access to. Currently it contains the following:

- A count of offenses.
- A count of citations based on the citation type.
- A map showing incident data.

This chart has a **Select a Display** option which allows you to select different date ranges. It is different from other charts in the date range options it presents, as it is only meant to display very recent data.

Unapproved Incidents

This is a more interactive version of the Non-Approved Reports chart featured on the home page. It gives you the option to display only initial incident reports (supplement 0) which are currently not approved (Initial, Disapproved, or Pending Approval), or all supplements not approved. You can click on a section of the chart to bring up a list of the incidents that fall under the category you clicked. You can then use the **Quick Tab** icon in the *Actions* column to view the details of the report.

Calls for Service

You can view CFS event imported from CAD or directly entered via the Online RMS module. The chart provides awareness of activities for shift briefings. Time ranges allow users to view events from a prior shift or particular time frame. Geo-coded events are available for plotting on a map display. You can filter by agency and user groups.

Chapter 23. Case Management

Case Management Overview

Case Management is controlled based on one of three options selected by your agency:

- The approving officer supervisor can create a **Case** and send the notification to the CID supervisor for assignment, or not create a **Case** and not send a notification to the CID supervisor.
  - If a decision to create a **Case** is made, the supervisor creates it and assigns it to a lead investigator, and if appropriate an officer.
  - The supervisor approving the report selects a follow-up action and disposition. An *Incident Approved* notification requesting a *Follow-up Case Decision* is forwarded to a person or persons with a CID Supervisor Role (determined by the agency) for review. The CID Supervisor then reviews the **Incident** and decides to close the **Incident** without further follow-up, or to create a follow-up **Case**, and assign it to an officer.

    For information on closing an Incident without a follow-up case, refer to "Close Incident with no Follow-Up Case" on page 474
- All approved Incidents are sent to the CID supervisor for a **Case** creation decision.
- No Case is automatically created and no notification is sent to the CID supervisor. The CID supervisor must manually create any Cases using the Case Management module.

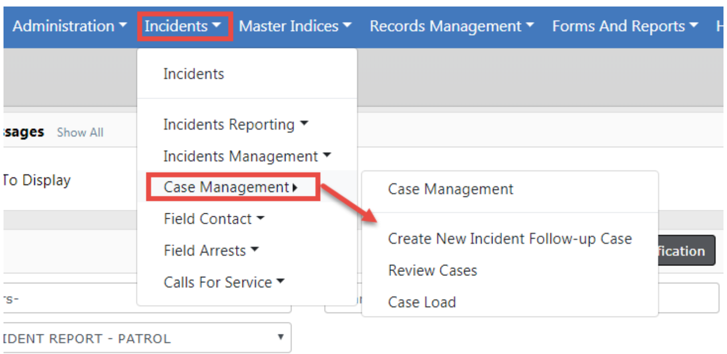
What is the difference between an Incident Report and a Case?

In Online RMS, when a user takes a *Report*, he creates an **Incident Report**. If the type of report written needs follow-up activity, that **Incident** can then be associated with a follow-up **Case** for investigative purposes.

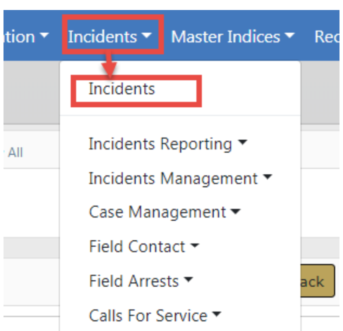
A **Case** is a way to manage the investigative process for one or multiple **Incident Reports**. For example if you have several burglary reports and suspect that all the burglaries are connected, each burglary will have its own **Incident Report** but all the reports can be assigned to one **Case**. This allows anyone investigating the burglaries access to all the information in one location without having to look up the individual reports. Cases can have more than one officer assigned to them. The officers have the ability to add notes to their cases and can send those notes to their supervisors to keep them updated.

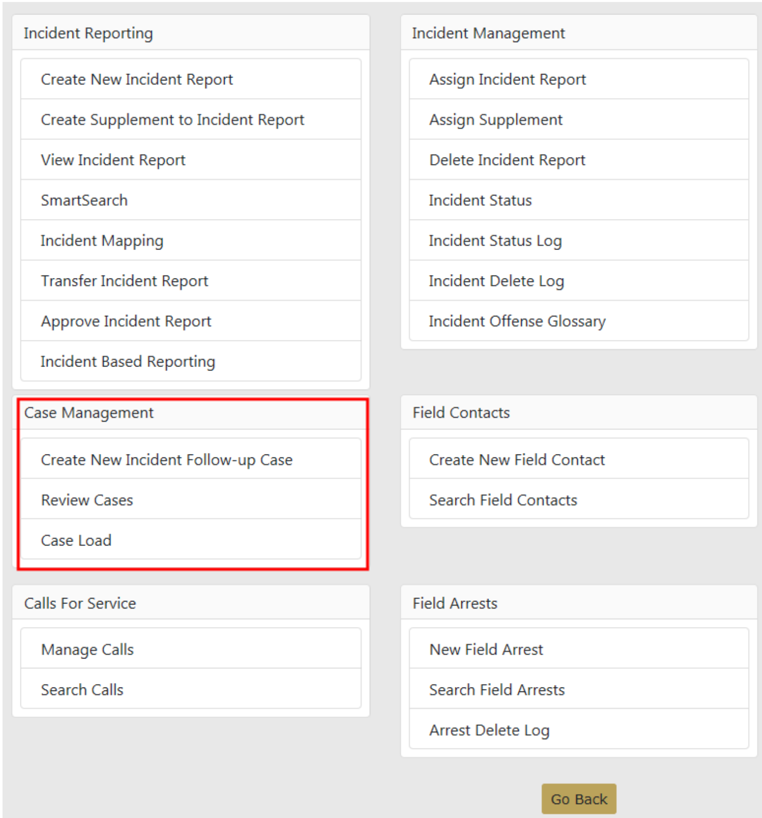
Accessing the Case Management Module

Case Management functions are centrally located under the *Incidents Menu* on top *Navigation Bar*.



Case Management functions can also be accessed from the *Incidents Page*.





Case Management Form

Pin Case

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

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

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

For more information on pinned records that appear on the Home Page, refer to "Home Page - Prior to RMS 11.12" on page 8.

Case Management Contains Four Tabs

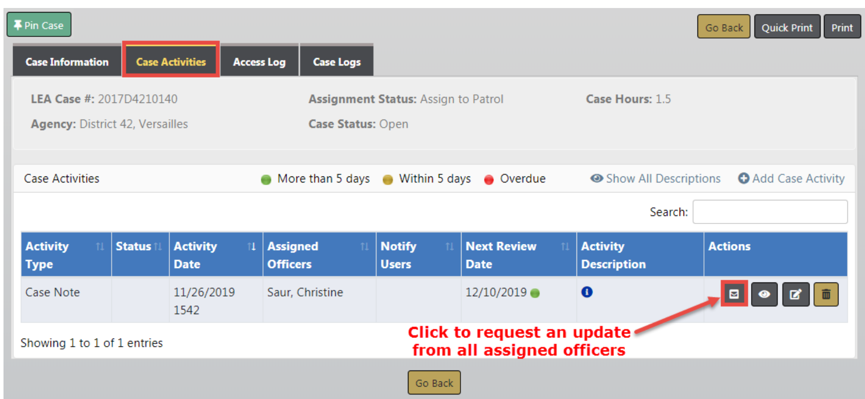
1. *Case Information*

   - Contains detailed information about the case, such as the case number, agency, status, security level, important dates, assigned officers, associated incidents, associated field arrests, associated field contacts, offenses, involved names and organizations, involved warrants, associated LEA cases, and attachments.

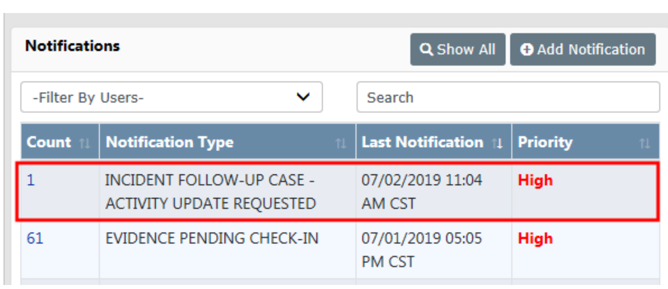
2. *Case Activities*

   - The *Case Activities* tab contains activities on the case such as notes made by the officer or investigating officer, status and type of activity performed on the case, important dates, and the hours worked on each activity. You can also assign officers and other information when adding a Case Activity.

   - On an existing Case Activity, with appropriate permissions you can request an update from all assigned officers by clicking on an icon.

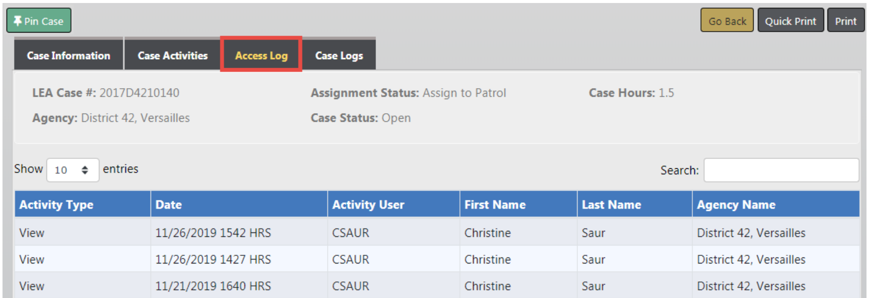


The assigned officers receive a *Notification* to update the Case Activity. The Notification appears under the *Notifications* grid on their *Home* page. For more information on Notifications, refer to"Notifications" on page 25.



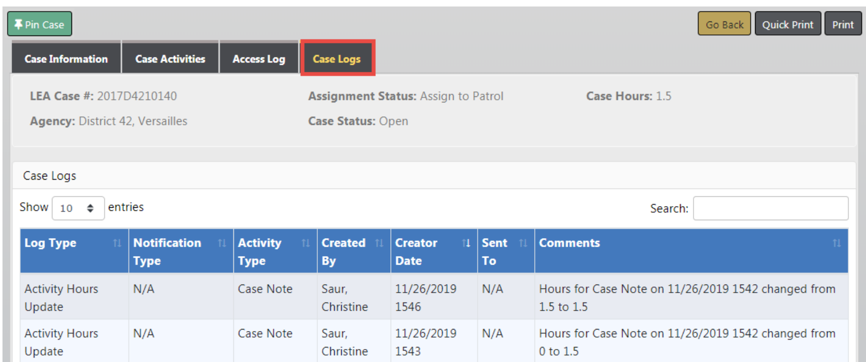
3. *Access Log*

- The system automatically logs when the case is viewed or updated. The log captures the user's name, agency, and the date it occurred. The *Access Log* tab displays those log entries in a read-only format.



4. *Case Logs*

- Activity that occurs on the case.



Create a Follow-Up Case

Multiple methods are available in creating a follow-up Case, depending on your permissions:

- From the initial unapproved Incident, investigators can create a case to begin working on an investigation without waiting for Incident approval.
- During the Incident review process. Incidents can be reviewed during the approval process, from a Notification, or from the Follow-Up Needed link under Recent Activities.

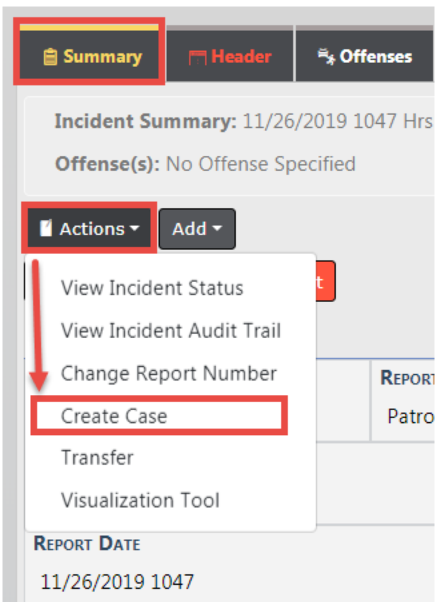
  For information on the Incident approval process, refer to "Approve/Disapprove Incident Report" on page 427.
- From the Case Management menu.

For information on accessing Case Management, refer to the *Access Case Management Module* section of CaseManagementOverview.htm.

Initiate from the Initial Unapproved Incident Report

Create an investigative case directly from an initial unapproved Incident report. You must have the permission *Create Case from Unapproved Incident* to access this feature. Refer to your agency administrator for details.

1. On the initial unapproved Incident report, click the **Action** button from the Summary tab, then select **Create Case** from the drop-down menu.



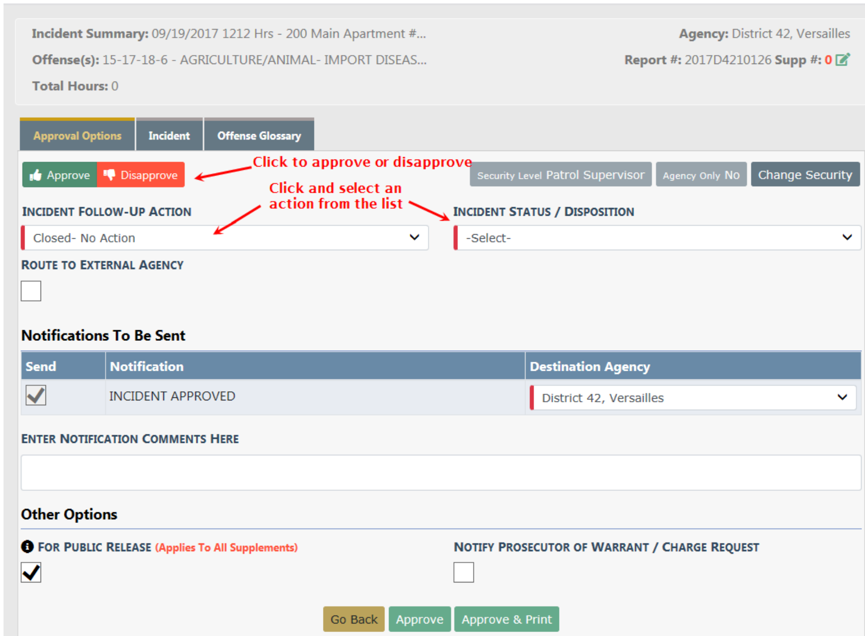
2. The *Add Case* screen appears. Enter the Case data then save. For more information on entering data, refer to "Enter Case Data" on page 463

Initiate through Incident Review

1. Create a Case while reviewing the Incident. Review the Incident by choosing one of the following methods:

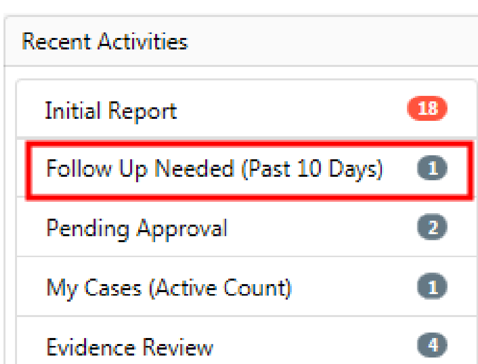
   - From the Approval Process

- The supervisor selects an **Incident Follow-up Action** of either *Follow-up Patrol*, *Follow-up CID*, or *Suspend/Pending Further Info.*



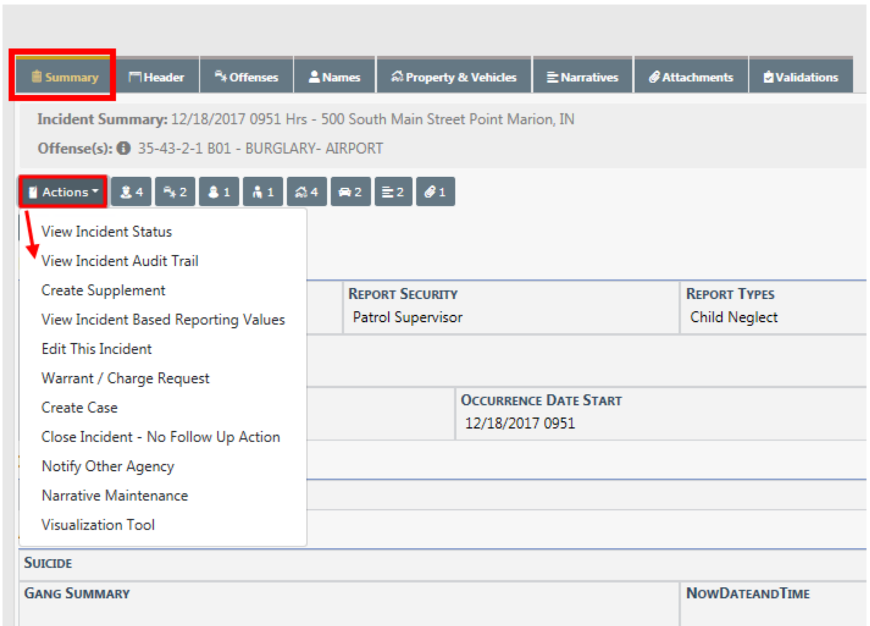
- A prompt appears to approve the Incident and create a **Case**. Electing to approve creates the **Case** and allows you to assign a Lead Investigator, and if appropriate, assign officer(s) to follow up with the Incident.

- From a Notification
  - Users with the CID Supervisor role (determined by the agency) can review the report from the Notification.
- From the Follow-Up Needed link under Recent Activities
  - Click on the *Follow-Up Needed* link to review the Incident report and make the decision to create a **Follow-up Case** to the Incident, or close the Incident without a follow-up case.

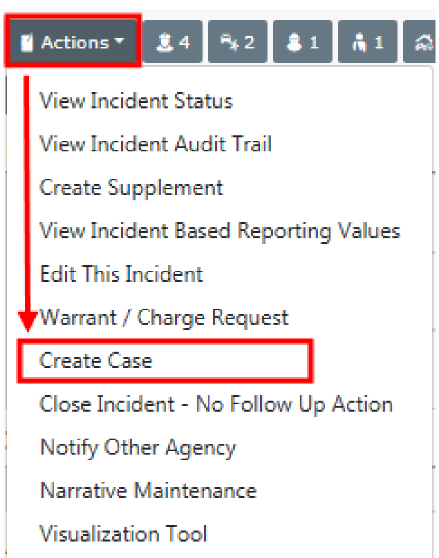


For information on closing an Incident without a follow-up case, refer to "Close Incident with no Follow-Up Case" on page 474

2. Review the Incident using whichever method you wish, then click on the **Actions** button on the top left of the Incident Summary tab to view menu options.



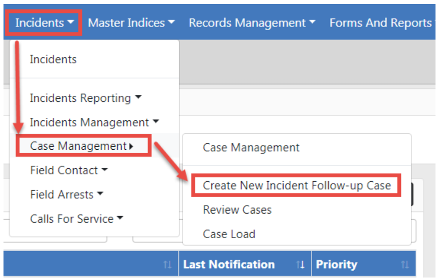
3. The CID Supervisor selects the **Create Case** menu option.



4. The *Add Case* screen appears. Enter the Case data then save. For more information on entering data, refer to "Enter Case Data" on the facing page

Initiate from the Case Management Menu

1. Create a Follow-Up Case from the Case Management Menu.



For additional methods of accessing the Case Management menu, refer to the *Access Case Management Module* section of CaseManagementOverview.htm

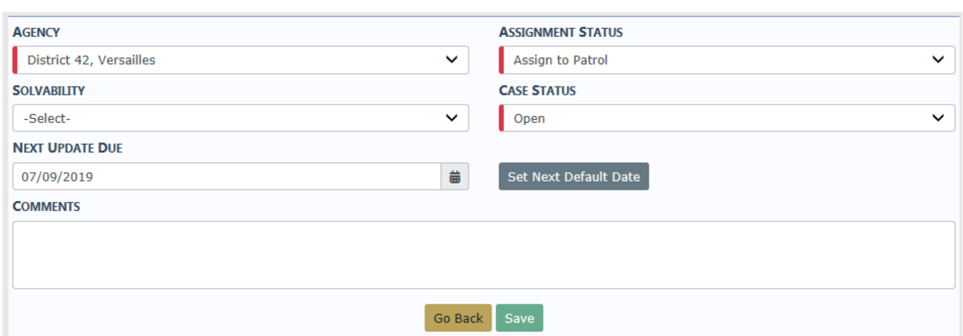
2. The *Add Case* screen appears. Enter the Case data then save. For more information on entering data, refer to "Enter Case Data" below

Enter Case Data

You can enter Case data when you create a new Case or update an existing Case.

1. If you are creating a new Case, initiate a new Case Follow-Up by using an available method. For details on the available methods, refer to "Create a Follow-Up Case" on page 459.

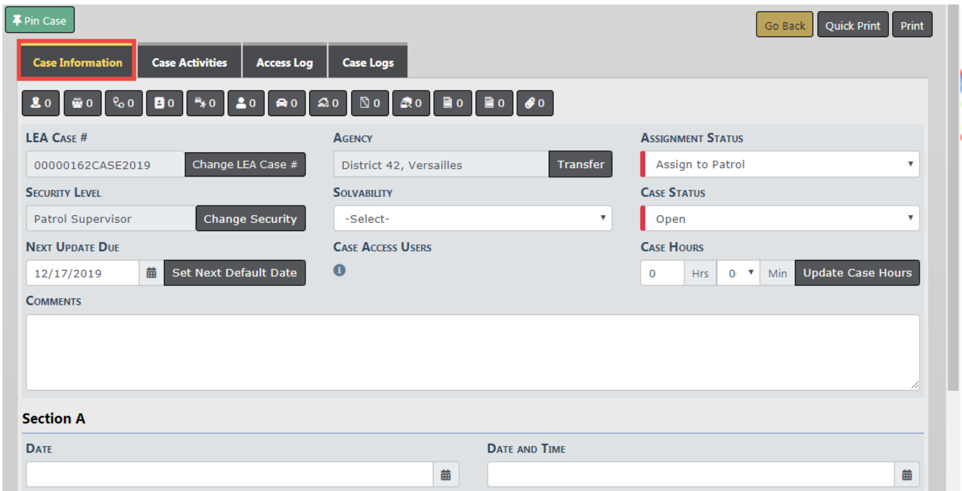
   The *Add Case* page appears.



Enter necessary data then click the **Save** button to open the *Edit Case* screen.

2. If you are updating an existing Case, search for the Case then choose update to open the *Edit Case* screen. For more information on searching for and updating a Case, refer to "Review Cases" on page 478

3. The *Edit Case* screen contains four tabs: Case Information, Case Activities, Access Log, Case Logs. The *Case Information* tab opens by default. For general information about the four tabs, refer to "Case Management Overview" on page 455.



Note: While viewing or editing, you can *Pin* the Case at anytime to add it to your Home Page for quick reference. For more information, refer to "Case Management Overview" on page 455.

Note: You can print a report wherever the print icon  or print button 

displays. For details, refer to "Print Case" on page 494.

4. Select an **Assignment Status** which allows the assignment of the case to either Patrol or CID. A **Case Status** must also be chosen. Set a **Solvability** to the Case, set an **Next Update Due**, and add a **Comment**.

5. The **LEA Case #** generates automatically. If you chose to change the **LEA Case #**, select the **Change LEA Case#** button, select an existing Incident Report number when prompted, then click **OK**.

6. The CID Supervisor has the ability to change the security level of the Case by clicking on the **Change Security** button to open the *Edit Case Security* screen. After changes are made, click **Save** to return to the *Edit Case* screen.

   For more information on setting the security level, refer to "Set Case Security Level" on page 473.

7. Next, the CID Supervisor will select the **Solvability** of the Case from the drop-down.

8. The CID Supervisor has the ability to change the **Next Update Due** date. The default is 60 days.

9. Next is the **Assignment Status**. The selections available vary by agency.

10. Next, the CID Supervisor will choose the **Case Status** from the drop-down selection.

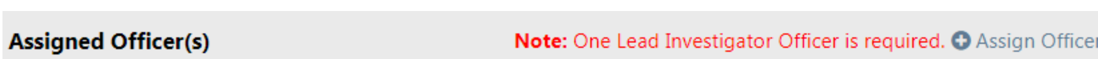
11. The CID Supervisor has the ability to hover over the information bubble near the **Case Access Users** to see all the individuals who have access to the Case. If the CID Supervisor chooses to change the **Security level** of the case, they will select the **Change Security** button and select the security level to which they feel appropriate for the Case. Remember, if a patrol officer is assigned to the Case and Case is set at the *Criminal Investigations Division*, the Patrol Officer will not be able to access the Case.

12. Each Officer and Supervisor assigned to the Case has the ability to log the Case hours by using the **Case Hours** fields. After selecting the appropriate hours, select **Update Case Hours**.

13. Finish completing the upper section of the Case, then select the **Update** button.

Note: There are icons located under the *Actions* column throughout the remaining sections of the Case. Hover your mouse over each icon for a description of what each one does: Review incident security/status, view incident, create a new supplement, associate an incident, print, and delete.

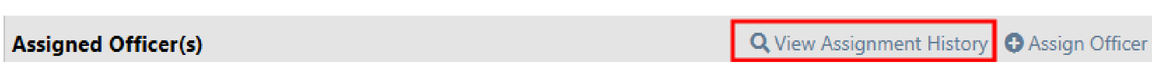
14. Page down to the *Assigned Officer(s)* section. Click on the **Assign Officer** link to assign an officer.



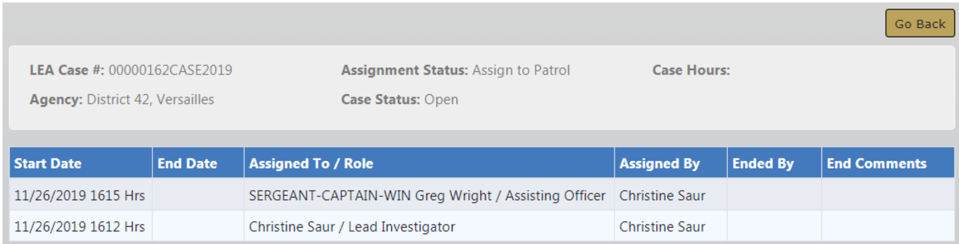
Note: One Lead Investigator Officer is required. The CID Supervisor must assign a Lead Incident Officer.

For more information on assigning officers, refer to #AssignCaseOfficer.

15. When at least one officer is assigned, a **View Assignment History** link appears in the *Assigned Officer(s)* section.



Click the link to view the assignment history.



Go Back

LEA Case #: 00000162CASE2019 **Assignment Status:** Assign to Patrol **Case Hours:**

Agency: District 42, Versailles **Case Status:** Open

Start Date	End Date	Assigned To / Role	Assigned By	Ended By	End Comments
11/26/2019 1615 Hrs		SERGEANT-CAPTAIN-WIN Greg Wright / Assisting Officer	Christine Saur		
11/26/2019 1612 Hrs		Christine Saur / Lead Investigator	Christine Saur		

Click **Go Back** to return to the Case.

16. Page down to the *Associated Incident(s)* section. The CID Investigator and the Assigned Lead Investigator has the ability to click on **Create Incident** to create a new Incident from the Case, or click on **Associate Incidents** to associate other Incidents to the same case. For details, refer to "Associate an Incident" on page 469.

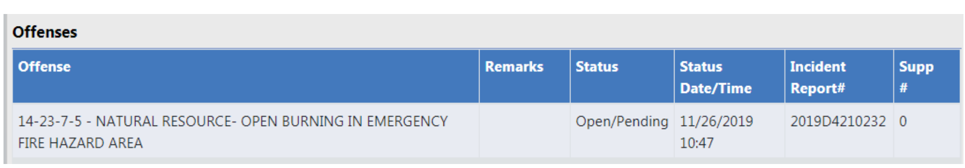
    With proper permissions, you can create a Supplement by clicking on the Create Supplement icon under the *Actions* column on Summary tab of the Incident form. If you do not see this icon, then you do not have the ability to perform this action. For more information about creating a Supplement, refer to "Create Supplements" on page 299.

    Note: Offenses associated with the Incident appear in the Offenses section as read-only.

17. To associate field arrests to the case, click on **Associate Field Arrests** in the *Associated Field Arrests* section. For more information on associating field arrests, refer to "Associate a Field Arrest" on page 471.

18. To associate field contacts to the case, click on **Associate Field Contact** in the *Associated Field Contacts* section. For more information on associating field contacts, refer to "Associate a Field Contact" on page 472.

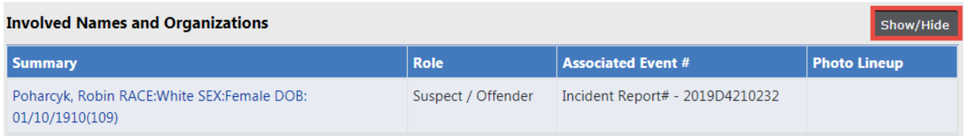
19. Offenses that exist on Associated Incidents appear for convenience in the **Offenses** section as read-only.

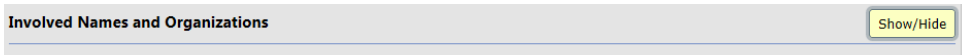


Offenses

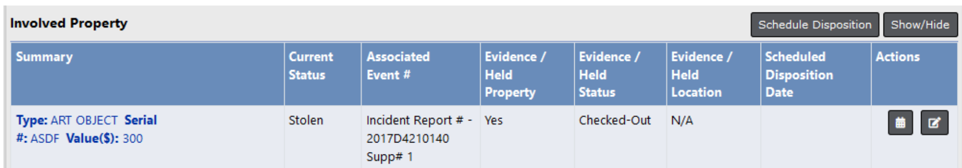
Offense	Remarks	Status	Status Date/Time	Incident Report#	Supp #
14-23-7-5 - NATURAL RESOURCE- OPEN BURNING IN EMERGENCY FIRE HAZARD AREA		Open/Pending	11/26/2019 10:47	2019D4210232	0

20. Involved persons and organizations on Associated Incidents appear for convenience in the **Involved Names and Organizations** section as read-only. You have the option to show or hide the details by clicking the **Show/Hide** button.



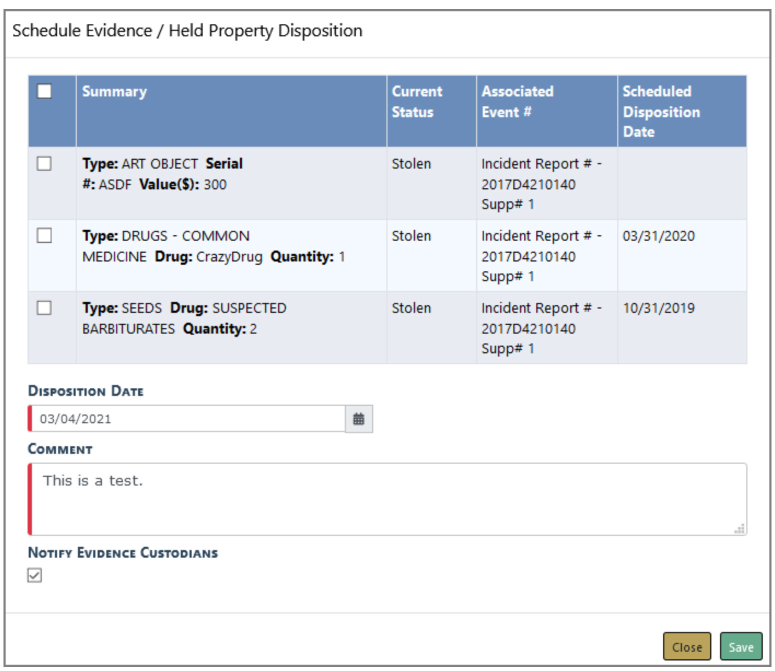


21. Associated evidence appears in the **Involved Property** section as read-only.



If you have appropriate permissions, you can schedule one or more dispositions of associated evidence directly from the case and notify evidence custodians.

a. Click the **Schedule Disposition** button to open *Schedule Evidence/Held Property Disposition*.



Or, you can schedule an individual property record by clicking the Schedule Disposition Date icon under the *Actions* column on a specific Involved Property record, enter a **Disposition Date** and **Comment** when prompted, then click **Save**.

b. Check each evidence/held property record that applies, or check the box on the upper left to select all.

c. Enter the **Disposition Date** and **Comments**.

d. Check the **Notify Evidence Custodians** box, if applicable.

e. Click **Save**.

22. Involved Warrants appear in the **Involved Warrants** section as read-only.

23. Click the **Associate LEA Case** link to associate LEA Cases.

24. Attach a form in the **Attached Forms** section by selecting from the list.

25. Click the **Add Attachment** link to add attachments to the Attachments section. Attachments can be photos or documents.

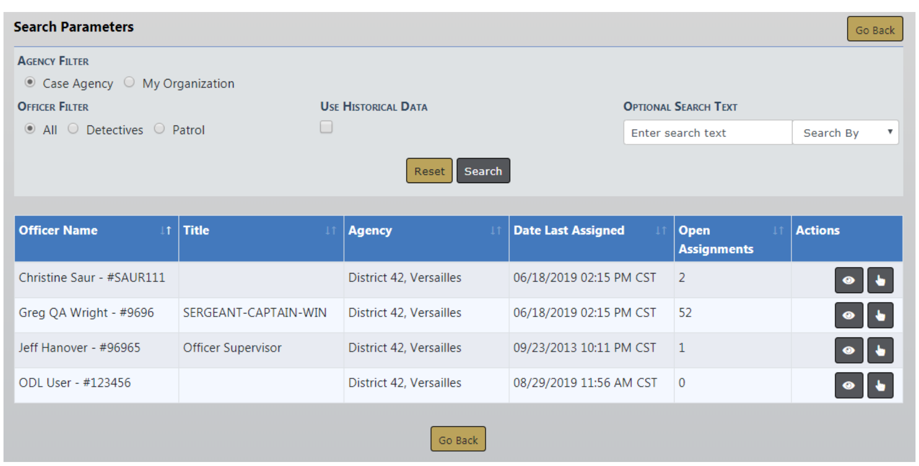
Assign Officer to Case

1. To **Assign** an officer to the Case, click the **Assign Lead Incident Officer** or **Assign Officer** link.

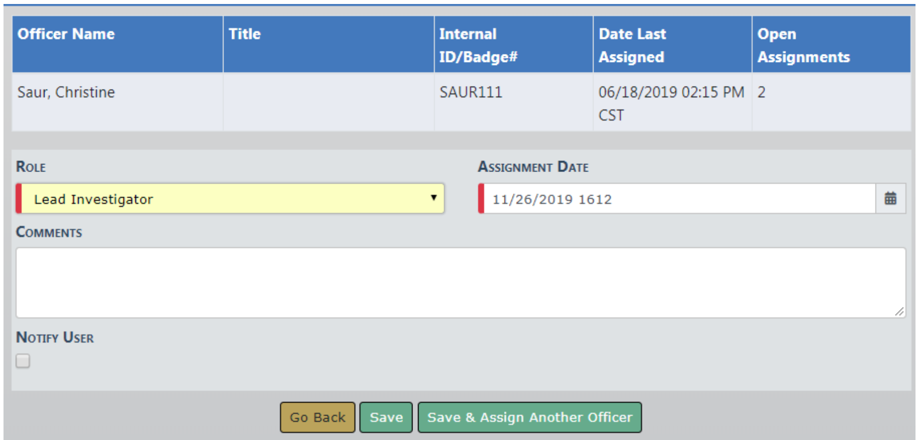
    - The **Assign Lead Incident Officer** link only appears when a lead Incident officer has not yet been assigned. It defaults the case to the officer who created the incident report. That officer can then be assigned to the case as the lead or as an assisting officer.

    - The **Assign Lead Incident Officer** link directly assigns the reporting officer to the case and the supervisor selects their role.

2. If the **Assign Officer** link is used, choose from a list of officers to assign to the case. Click the select icon to choose an officer from the results list.



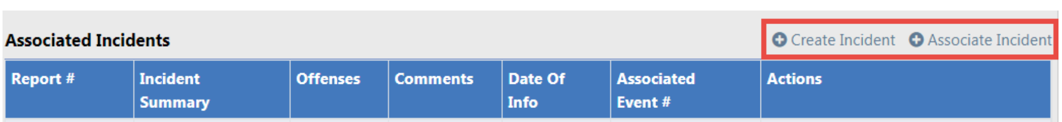
3. Select the **Role** and **Assignment Date**. Optionally, select the **Notify User** box to send an informational Notification to officer.



Note: You can also assign officers when creating a Case Activity. For more information on creating Case Activities, refer to "Create Case Activity" on page 481.

Associate an Incident

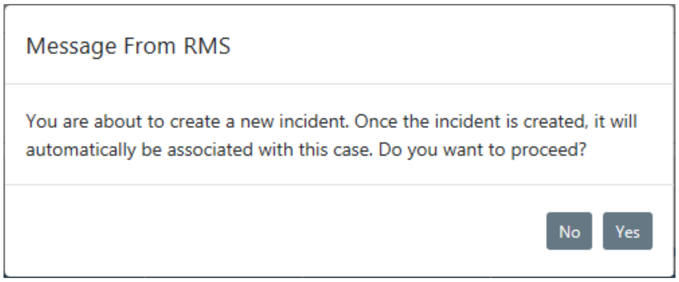
You can associate an Incident by either creating an Incident directly from the Case or selecting an existing Incident. Page down to the *Associated Incident(s)* section of the Case and click either the **Create Incident** or **Associate Incident** link.



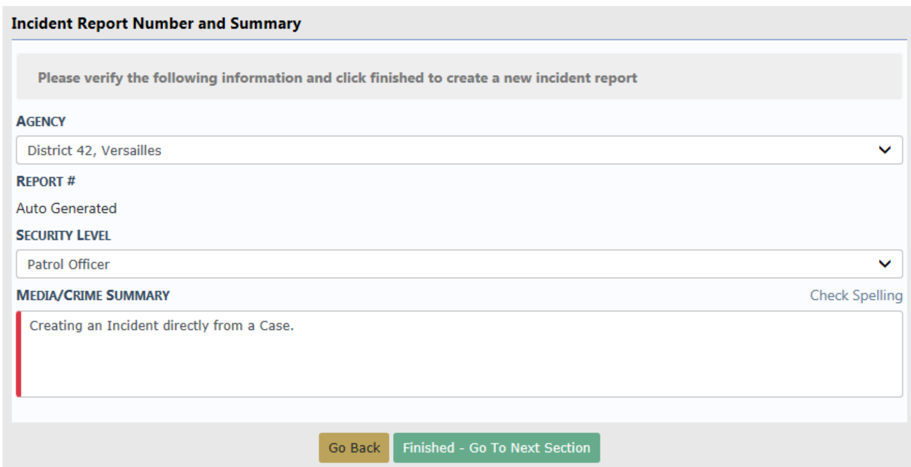
Create Incident

1. To create an Incident and associate it to the Case, click the **Create Incident** link.

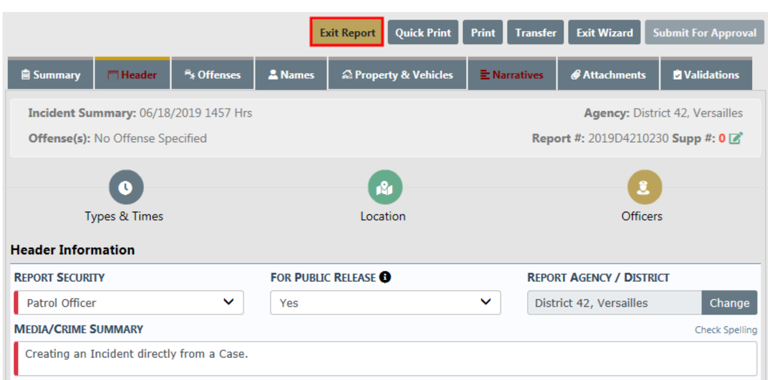
2. A message appears informing you the newly created Incident will automatically be associated with the Case. Click **No** to return to the Case without creating the Incident, or click **Yes** to create the Incident and continue to the next step.



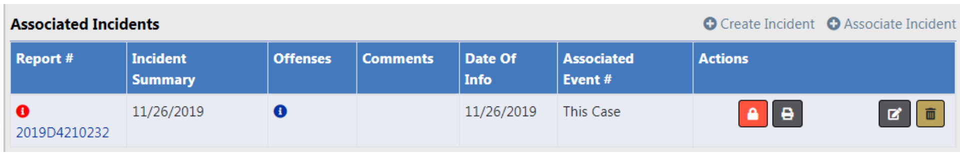
3. If you chose to create the Incident, an *Incident Report Number and Summary* screen appears. Review and make any necessary changes. Enter comments into the **Media/Crime Summary** text box, then click the **Finished-Go To Next Section** button.



4. The Incident Report wizard opens. Add the necessary information to the Incident Report. Click the **Exit Report** button on the top of the screen at any time to return to the Case. For more information on entering data into various tabs of the Incident Report, refer to "Incident Report Tabs" on page 200.

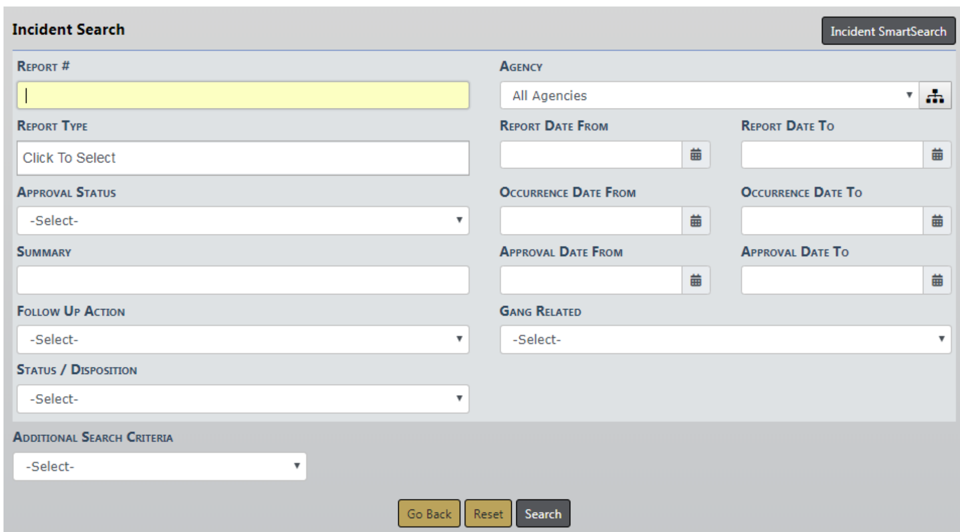


5. The newly created Incident Report appears in the *Associated Incidents(s)* grid of the Case.



Associate Existing Incident

1. To associate an existing Incident, click the **Associate Incident** link to open the *Incident Search* screen.

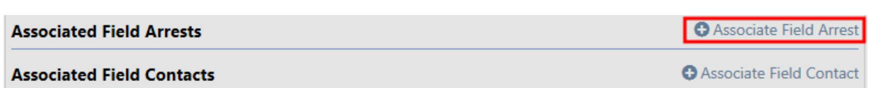


2. Search for the Incident and select it from the results grid. For more information on searching for Incidents, refer to "View Incident Reports" on page 265.

3. The selected Incident Report appears in the *Associated Incidents(s)* grid of the Case.

Associate a Field Arrest

1. To associate a Field Arrest to the Case, click the **Associate Field Arrest** link.



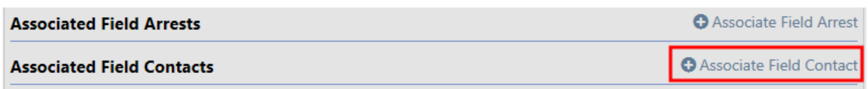
2. A *Field Arrest Search* screen appears.

3. Search for the Field Arrest you want to associate to the Case. For details on searching for a Field Arrest, refer to "Search Field Arrests" on page 358.

4. Select the appropriate Field Arrest from the results grid by clicking on select icon in the *Actions* column. The selected Field Arrest then appears under the *Associated Field Arrests* section of the Case.

Associate a Field Contact

1. To associate a Field Contact to the Case, click on the **Associate Field Contact** link.



2. A *Field Contact Search* screen appears.

3. Search for the Field Contact you want to associate to the Case. For more information on searching for a Field Contact, refer to "Search for a Field Contact" on page 410.

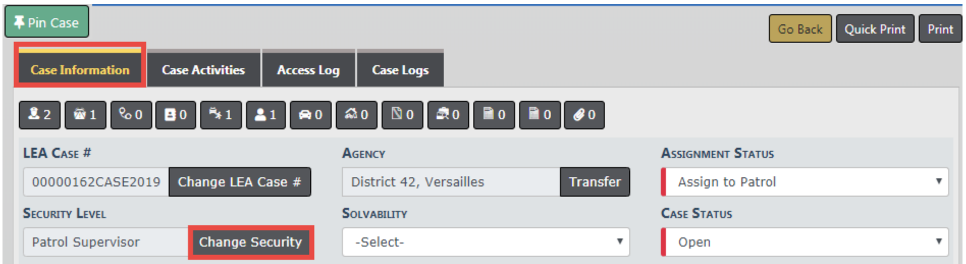
4. Select the appropriate Field Contact from the results grid by clicking on select icon in the *Actions* column.

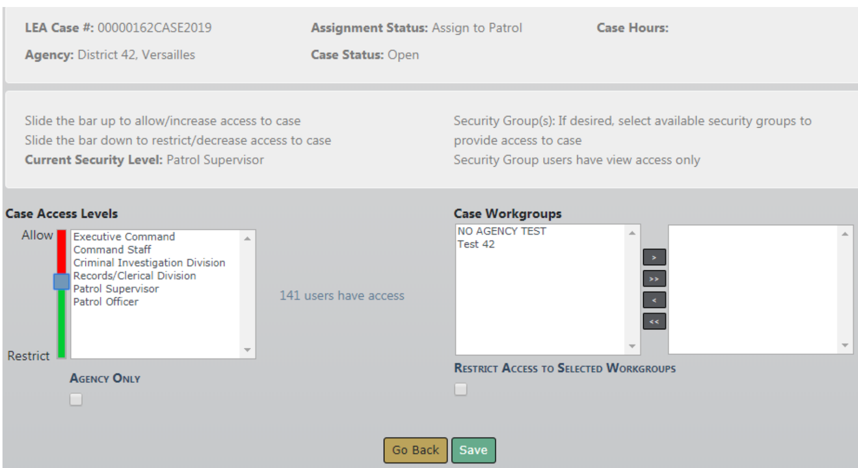
5. A warning message appears informing you that by associating the Field Contact to the Case, limited access to the Field Contact occurs. Only users with access to the Case are able to view or edit the Field Contact. Click **No** to return to the Case without associating the Field Contact, or click **Yes** to associate the Field Contact to the Case.

6. If you chose **Yes**, the selected Field Contact then appears under the *Associated Field Contacts* section of the Case.

Set Case Security Level

1. To set the **Security Level** of the Case go to the top of the Case Information tab. Click the **Change Security** button to display the *Security Setting* screen.





The CID Supervisor only has the ability to restrict up to the level of *Criminal Investigations Division*. If they restrict further, the would not have access to the Case. At this point, the CID Supervisor has the ability to see what users have access to the Case.

2. To adjust the security slide the bar up or down that is located just left of the **Case Access Level**. Sliding the bar up will allow more users access to the case, sliding the bar down will restrict access. Security can further be adjusted by assigning the case to a **Security Group**. Anyone within the **Case Access Level** box, and persons included in the **Security Group**, will have access to the case. If the box located below the **Security Group** is checked, this will restrict access to only persons in the **Security Group** and the officer assigned to the case.

   Note: If the user making the assignment is not part of the **Security Group** they will not have access to the case if the **Restrict Access** box is checked.

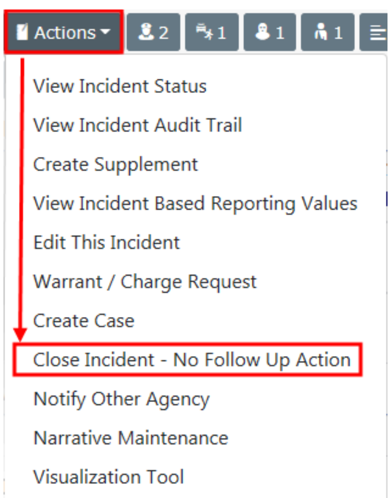
3. Click the **Save** button.

Ensure that person(s) who are not supposed to have access to the incident report cannot access the report; the incident security must be set. Associating a report to a "Case" which has restricted access will NOT restrict access to any incident report associated with that case. The incident report security has been restricted as well if you want to secure the incident report access. Incident security can be set at the time of approval of the report or by the USER reviewing the incident report. The supervisor reviewing the "incident report" cannot restrict access above his level. This prevents anyone from "locking" themselves out of the report.

The Lead Investigator along with the CID Supervisor needs to remember that if the Case security is changed, it does not automatically change the security of the associated Incident Report. The Lead Investigator and/or CID Supervisor must also change the security of the Incident Report if deemed appropriate.

Close Incident with no Follow-Up Case

To close an incident from the review process with no **Follow-up Case** needed, the CID Supervisor selects the **Close Incident - No Follow Up Action** menu option from the **Actions** button.

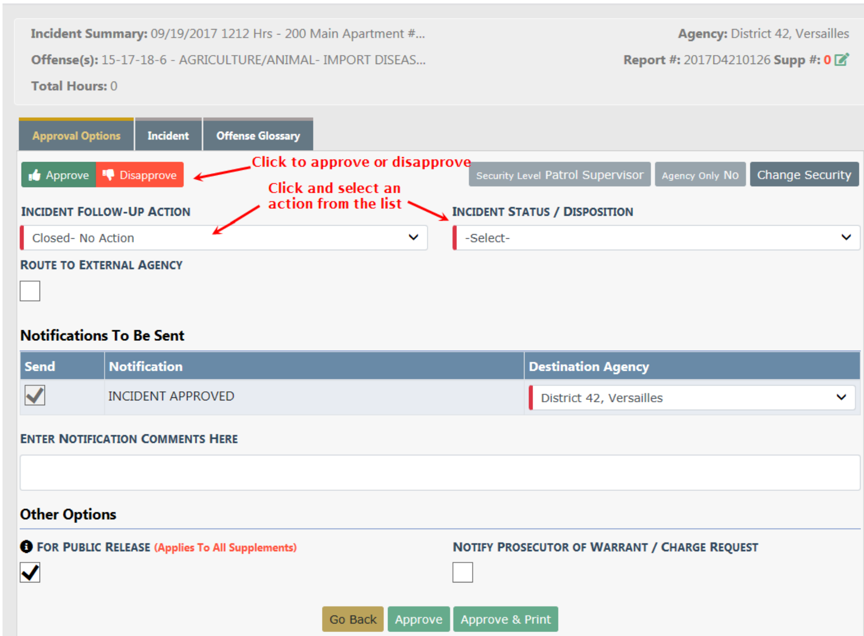


A window appears where the **Incident Disposition** is selected from a list, then select the **Close** button to close the incident with no case follow-up.

The CID Supervisor can also keep an Incident, but not create a **Case**:

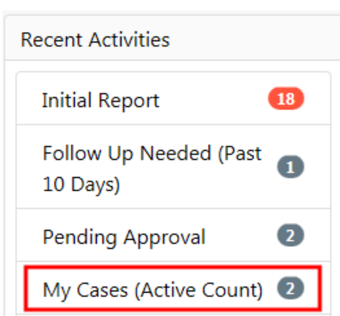
When the CID Supervisor decides a **Case** should not be created for the Incident, they select *Closed-No Action* for the **Follow-up Action** and select the reason for the **Incident Status/Disposition**. Select an **Incident Status**. The report can then be approved by selecting the **Approve** button.

For more information on the Incident approval process, refer to "Approve/Disapprove Incident Report" on page 427.

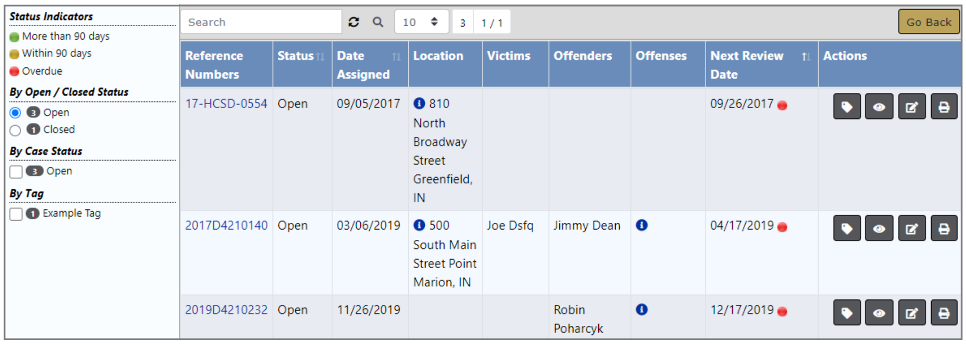


Navigating Throughout the Case

When a Lead Investigator and/or Officer is assigned a case, in their **Recent Activities** they will see a number next to *My Cases*.



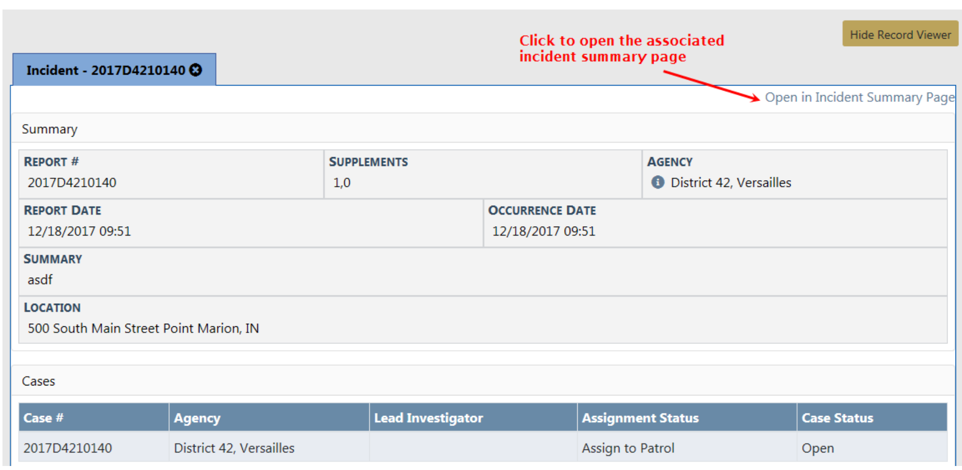
Select the number and the **My Active Cases** screen opens.



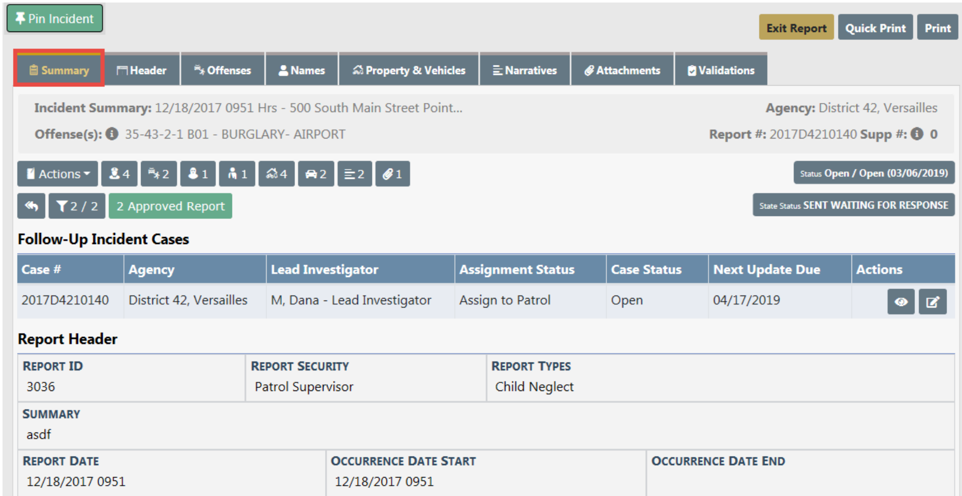
Using the **Tag** icon you can tag cases with keywords you choose, to group cases based on similar actions, suspects, or other information. For more information on tags, refer to "Investigative Case Tags" on page 492.

If offenses are associated with the Incident, hover over the **Information** icon under the *Offenses* column, to see the *Associated Offenses*.

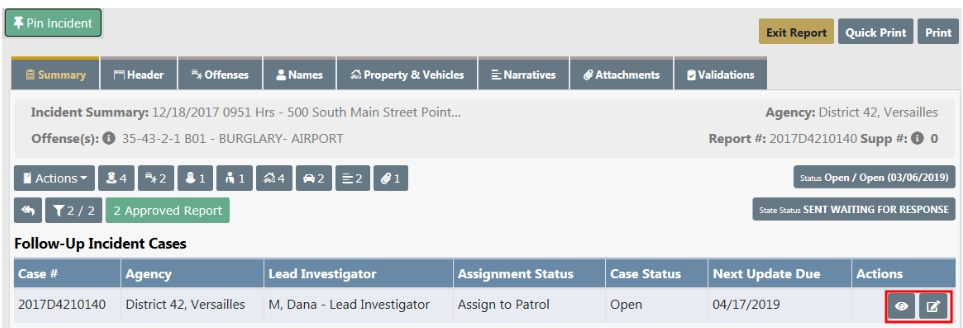
By selecting the hyperlink under *Reference Numbers* you are taken directly to the **Record Viewer** which is a snapshot of the Case.



Select the hyperlink **Open in Incident Summary** and the associated Incident opens on the **Summary** page.

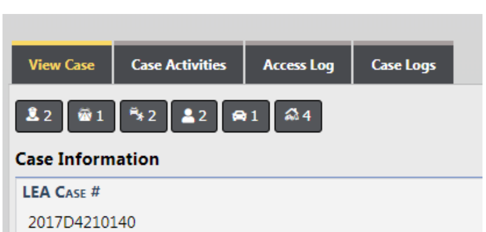


In the section *Follow-Up Incident Cases* you will have the ability to either view or edit (based on your permissions) the Case.



Note: With appropriate permissions, you can *Pin* the Incident while on the Summary tab to add it to your Home Page for quick reference. For more information, refer to "Incidents Overview" on page 189.

Also from the **View Case** page, you have the ability to view the *Case Activities*, *Access Log*, and *Case Logs* tabs.



Note: While viewing or editing, you can *Pin* the Case at anytime to add it to your Home Page for quick reference. For more information, refer to "Case Management Overview" on page 455.

Review Cases

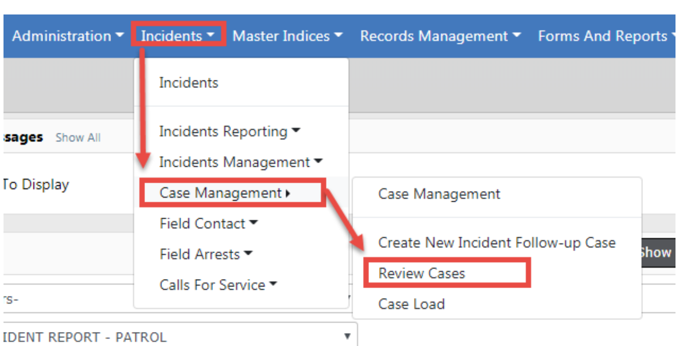
You can search for and review selected Cases to which you have permissions. Review mode provides read-only details of the Case and a data summary of each module to which the Case is linked:

- Assigned Officers
- Incidents
- Associated Field Arrests
- Offenses
- Involved Names and Organizations
- Involved Vehicles
- Involved Warrants

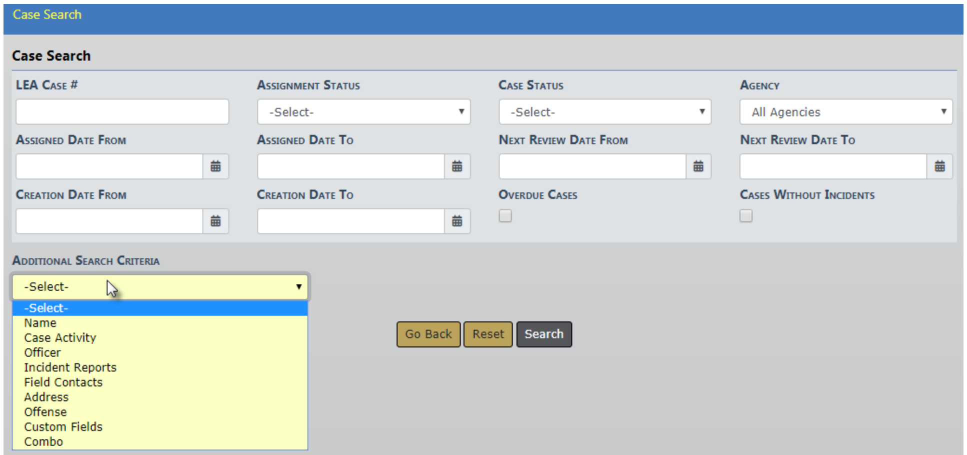
Note: While Review mode is read-only, you have the option to toggle to edit mode to apply updates.

To review the Case:

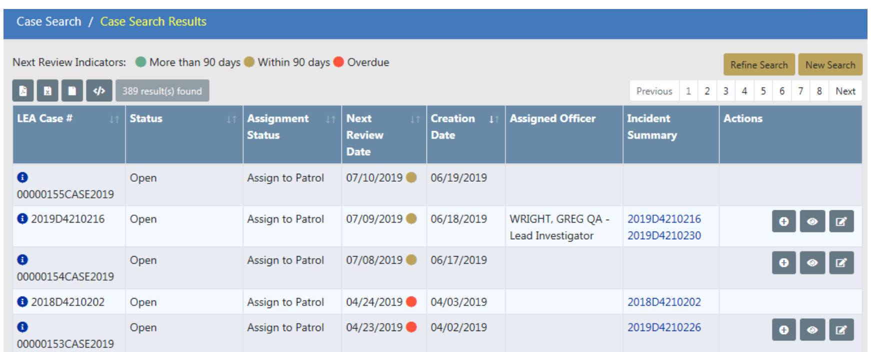
1. From the **Incidents** menu, select **Case Management**, then **Review Cases** to open the *Case Search* screen.



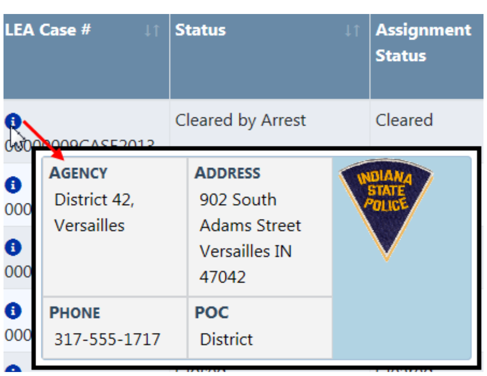
2. Enter the search criteria. The *Additional Search Criteria* drop-down box provides more search options such as, *Field Contacts* and others.



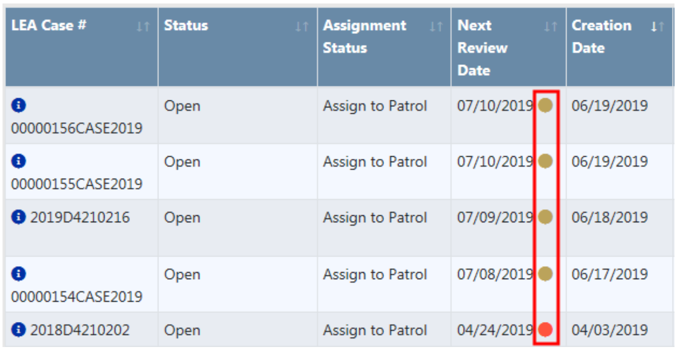
3. Click **Search** to open the *Search Results* page listing the records that match your search criteria.



4. You can hover over the information bubble to display additional information.



5. The *Next Review Date* column uses three color indicators that quickly identifies cases with upcoming review dates, or have surpassed the next review date.

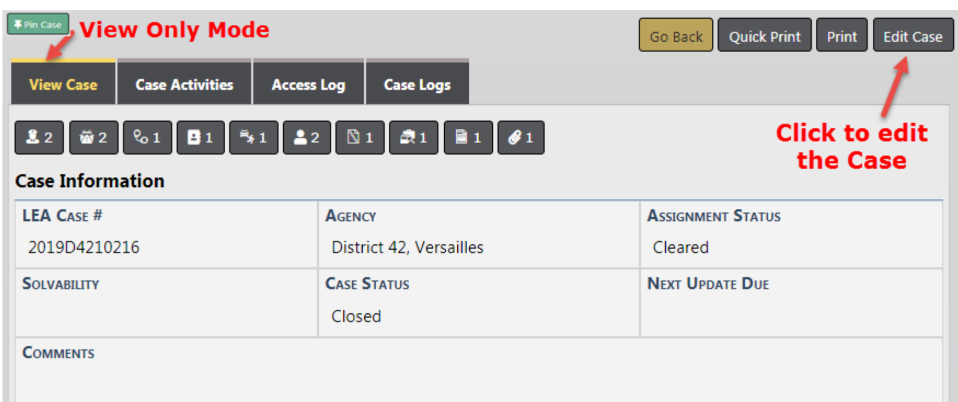


LEA Case #	Status	Assignment Status	Next Review Date	Creation Date
00000156CASE2019	Open	Assign to Patrol	07/10/2019	06/19/2019
00000155CASE2019	Open	Assign to Patrol	07/10/2019	06/19/2019
2019D4210216	Open	Assign to Patrol	07/09/2019	06/18/2019
00000154CASE2019	Open	Assign to Patrol	07/08/2019	06/17/2019
2018D4210202	Open	Assign to Patrol	04/24/2019	04/03/2019

6. The icons in the *Actions* column allows you to act on the Case such as, *Add Case Activity*, *View*, or *Edit*, respectively. If you do not see one or more of these icons, then you do not have permissions to perform that particular action.

a. Click on the **Add Case Activity** icon to add an activity. For more information on adding a Case Activity, refer to "Create Case Activity" on the facing page.

b. Or click the **View** icon to open the Case in view-only mode.



c. Or click the **Edit Case** icon to open the Case in edit mode and make necessary updates to the Case.

For details on entering information on the Case Information tab, refer to "Enter Case Data" on page 463.

For details on entering information on the Case Activities tab, refer to "Create Case Activity" on the facing page.

For details on the contents of the Access Log, refer to "Case Management Overview" on page 455.

Note: While viewing or editing, you can *Pin* the Case at anytime to add it to your Home Page for quick reference. For more information, refer to "Case Management Overview" on page 455.

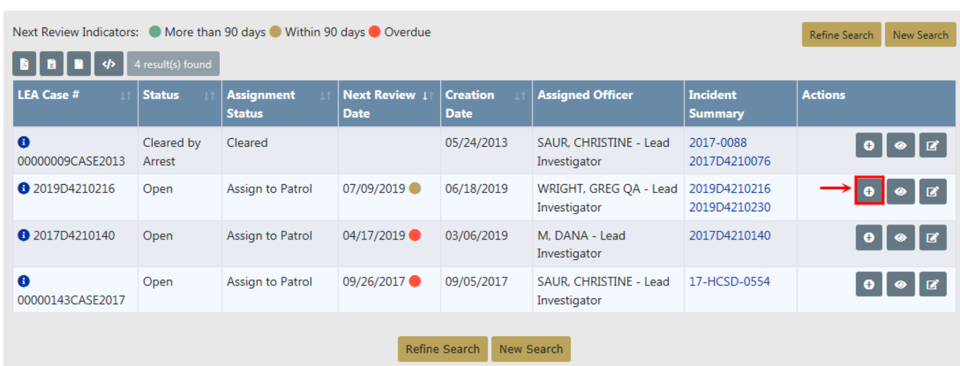
Create Case Activity

The *Case Activities* tab of a Case contains activities on the case, such as notes made by the officer or investigating officer, status and type of activity performed on the case, important dates, and the hours worked on each activity. You can also assign officers when adding a **Case Activity**.

1. Use one of two methods to initiate a new **Case Activity** record.

- From the *Case Search Results* screen. For instructions on Case searching, refer to "Review Cases" on page 478.

  - Search for and locate the Case, then click on the **Add Case Activity** icon in the *Actions* column.



Next Review Indicators: More than 90 days Within 90 days Overdue

Refine Search New Search

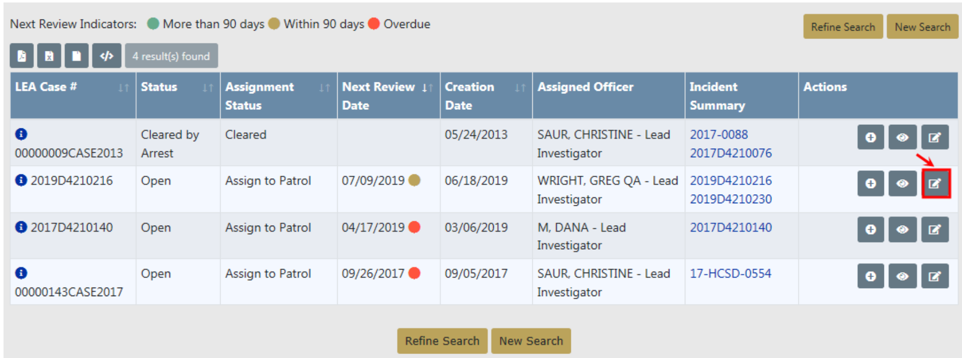
4 result(s) found

LEA Case #	Status	Assignment Status	Next Review Date	Creation Date	Assigned Officer	Incident Summary	Actions
00000009CASE2013	Cleared by Arrest	Cleared		05/24/2013	SAUR, CHRISTINE - Lead Investigator	2017-0088 2017D4210076	
2019D4210216	Open	Assign to Patrol	07/09/2019	06/18/2019	WRIGHT, GREG QA - Lead Investigator	2019D4210216 2019D4210230	
2017D4210140	Open	Assign to Patrol	04/17/2019	03/06/2019	M, DANA - Lead Investigator	2017D4210140	
00000143CASE2017	Open	Assign to Patrol	09/26/2017	09/05/2017	SAUR, CHRISTINE - Lead Investigator	17-HCSD-0554	

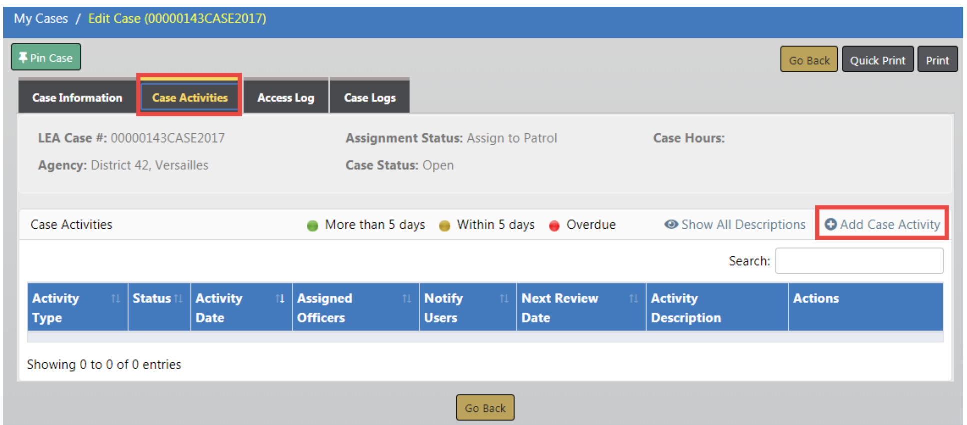
Refine Search New Search

- From the *Case Activities* tab of the *Edit Case* page.

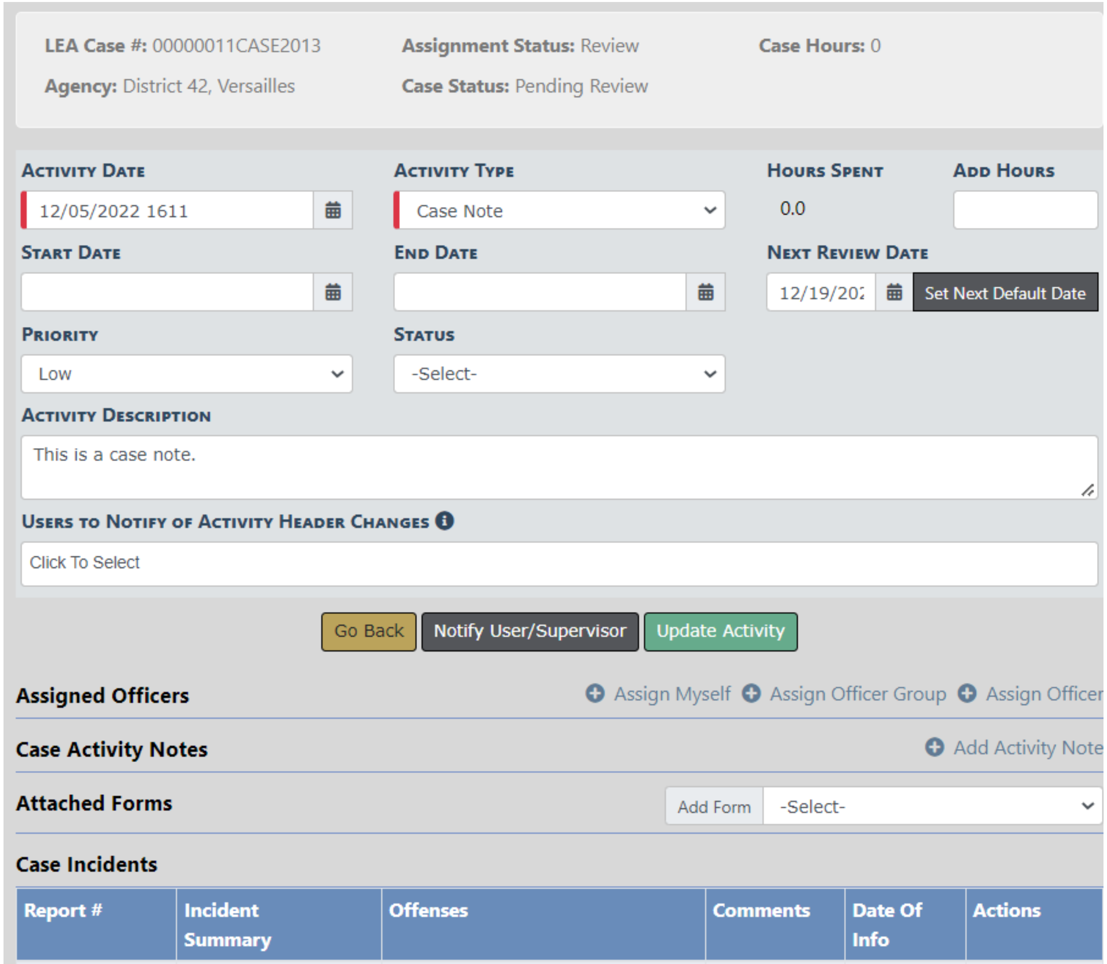
  - Search for and locate the Case, then click on the **Update** icon in the *Actions* column.

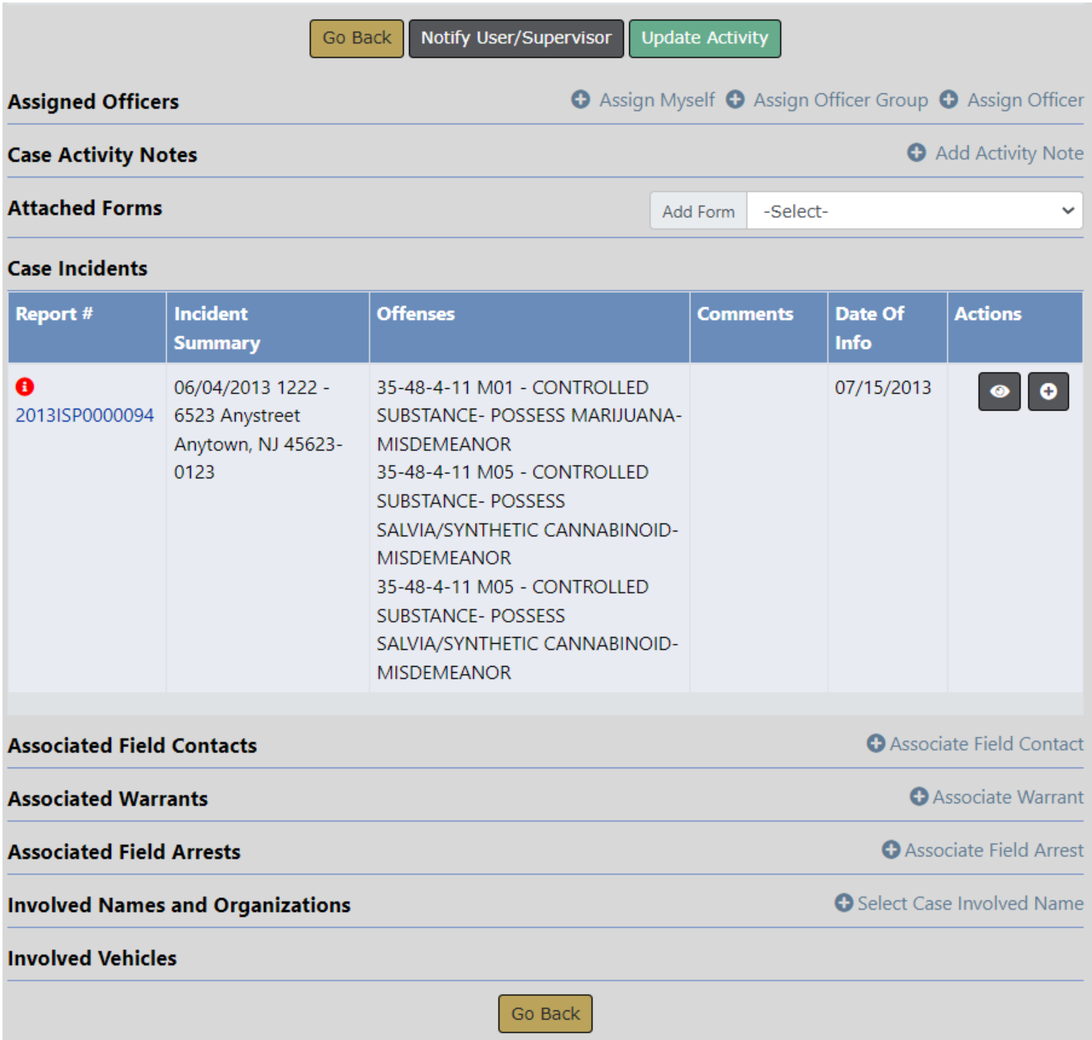


- Click on the *Case Activities* tab of the *Edit Case* page, then click on **Add Case Activity**.

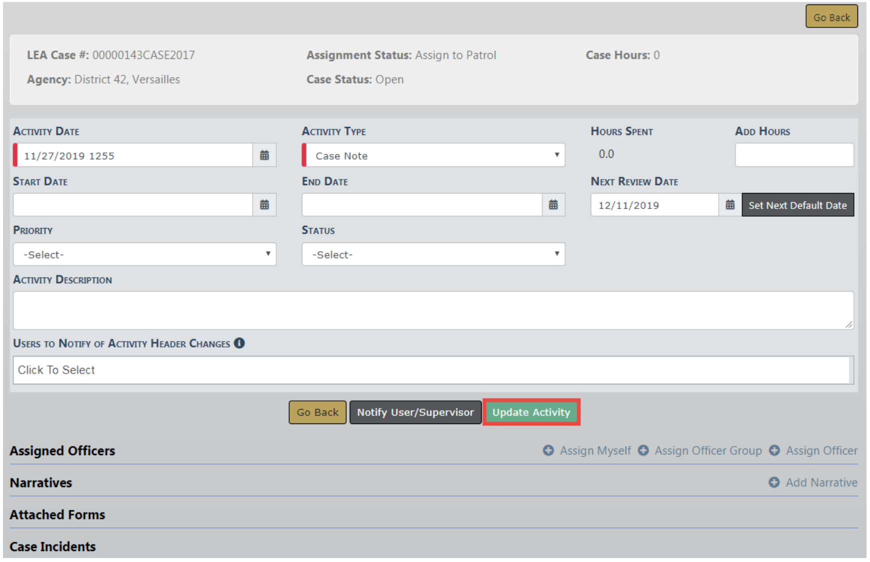


2. The *Add Case Activity* page opens. Enter the necessary information into the fields provided, then click the **Save Activity** button.


LEA Case #: 00000011CASE2013
Assignment Status: Review
Case Hours: 0
Agency: District 42, Versailles
Case Status: Pending Review
Activity Date
12/05/2022 1611
Activity Type
Case Note
Hours Spent
0.0
Add Hours
Start Date
End Date
Next Review Date
12/19/202
Set Next Default Date
Priority
Low
Status
-Select-
Activity Description
This is a case note.
Users to Notify of Activity Header Changes
Click To Select
Go Back
Notify User/Supervisor
Update Activity
Assigned Officers
Assign Myself
Assign Officer Group
Assign Officer
Case Activity Notes
Add Activity Note
Attached Forms
Add Form
-Select-
Case Incidents
Report #
Incident Summary
Offenses
Comments
Date Of Info
Actions



3. The page changes from *Add Case Activity* to *Edit Case Activity*, and the **Save Activity** button changes to **Update Activity**.



4. Optionally make additional changes or page down and add officers, narratives, and other information to the Case Activity.

   When adding officers, you can assign yourself as the officer, add an officer group , or assign one officer by clicking on the respective link.

5. **Custom Field** support allows agencies to capture custom data by adding agency specific data elements, such as text fields, list of values, checkboxes, etc. The **Custom Field** feature must be enabled for it to be available.

   For more information on adding information to the Case Activity, refer to "Update Case Activity" below.

Update Case Activity

You can update a Case Activity by using one of three methods:

- From the **Case Activity** tab of an existing Case.

  For more information on searching and selecting a Case, refer to "Review Cases" on page 478.

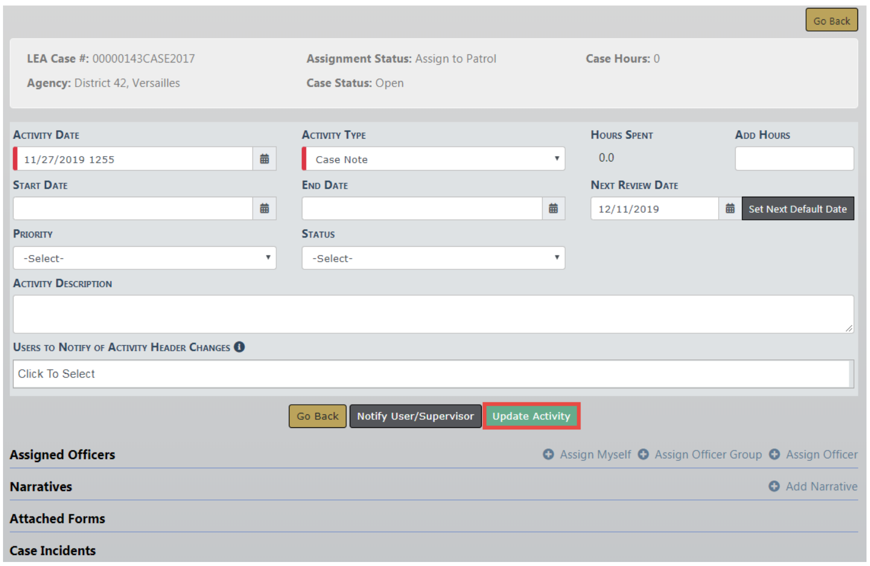
- From the **My Case Activities** link under the *Recent Activities* section on your *Home* page. You must be associated with at least one existing Case Activity for the link to appear.

  For more information on **My Case Activities**, refer to "Show My Case Activities" on page 492.

- When creating a new Case Activity.

  For more information on creating a Case Activity, refer to "Create Case Activity" on page 481.

1. Open the *Edit Case Activity* page of the Case Activity you want to update, using one of the methods mentioned above.

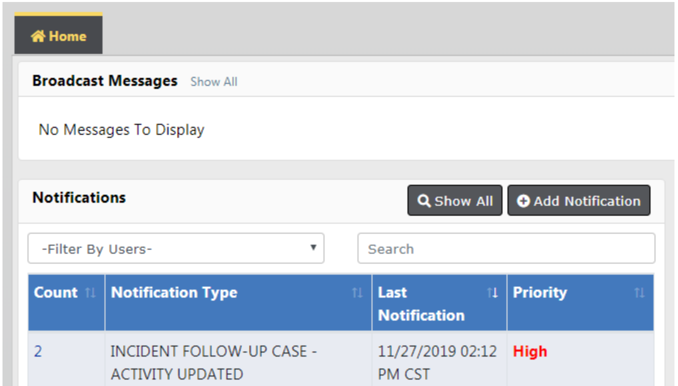


   Make the necessary changes to the top section then click the **Update Activity** button to save.

2. To notify specific users of the case update, click the **Notify User/Supervisor** button to open the *Notify User/Supervisor* form.

   Select one or more **Users** to notify and type a **Comment**.

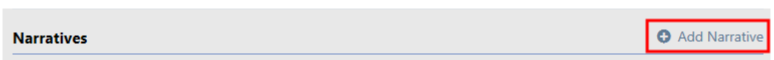
   Click **Send** to send a Notification message to the selected users informing them of the case update. The notification appears on the users home page under Notifications.



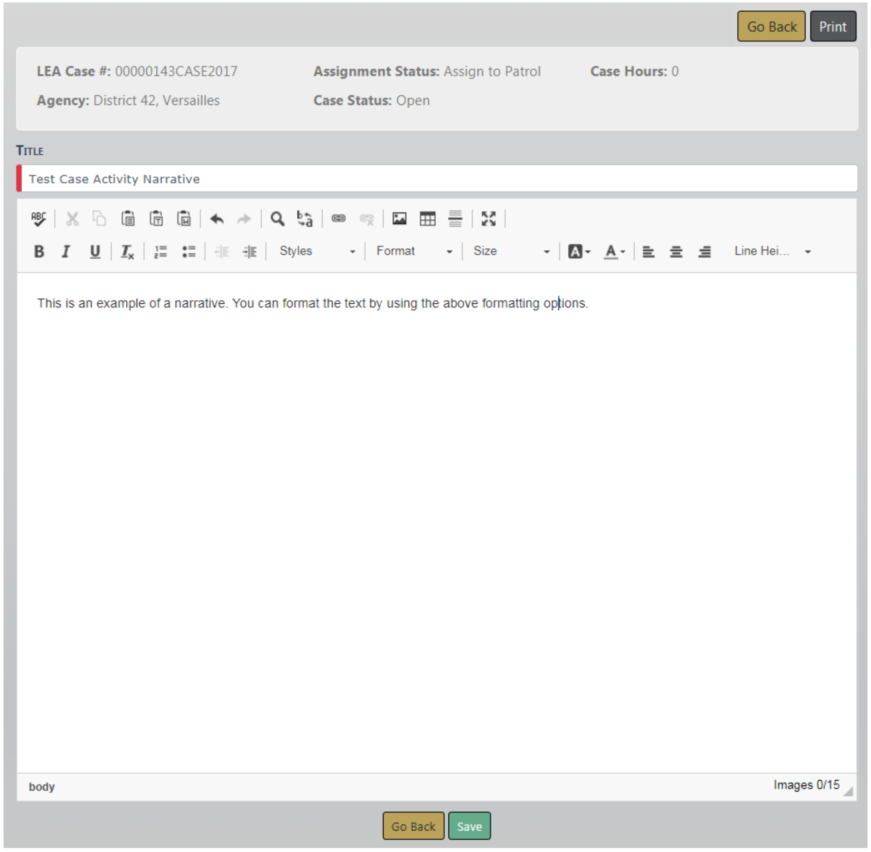
For more information on notifications, refer to "Notifications" on page 25.

3. In the Officer section, optionally click the **Assign Myself** link to add yourself as the officer, click on the **Assign Officer Group** link to assign two or more officers, or click on the **Assign Officer** link to add one officer.

4. Optionally, click the **Add Narrative** link to add a Narrative.



Give the Narrative a **Title** and enter your comments using the available format options. The system auto-saves the Narrative every sixty seconds in the event the connection is lost or the computer becomes unusable.



You can use the formatting icons to customize the layout of your narrative. The built-in *Spelling and Grammar Checker* identifies mistakes and corrects them as you type.

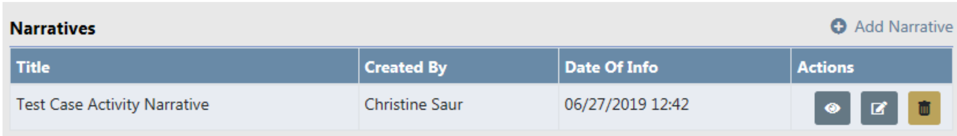
You can *insert an image* by clicking on the **Image** icon.

Note: For more information on Narratives, refer to "Narrative Tab" on page 240.

Note: You have the ability to reference the Case Activity Narrative on the Incident Narrative using the Quick Reference icon. For more information, refer to "Narrative Tab" on page 240.

Optionally, click the **Print** button to print the current narrative. For more information on Case printing, refer to "Print Case" on page 494.

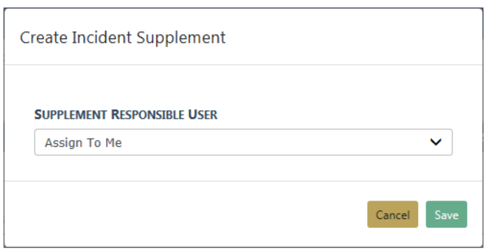
Click the **Save** button when you are finished, then click **Go Back** to return to the Case Activity.



With proper permissions, you can view, edit, or delete the Narrative by clicking on the respective icons in the *Actions* column.

5. With proper permissions, you can create a Supplement to a Case Incident that appears in the grid. Click on the **Create Supplement** icon.

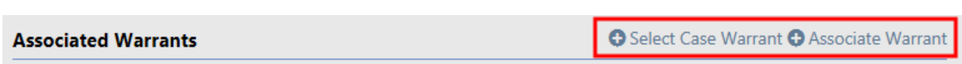
A prompt appears asking you to select the **Supplement Responsible User**.



Click into the field then choose an available name from the list, then click **Save** to create the Supplement.

6. Optionally, click on the **Associate Field Contact** link to search for and select a Field Contact. For more information on searching and selecting Field Contacts, refer to "Field Contacts" on page 407.

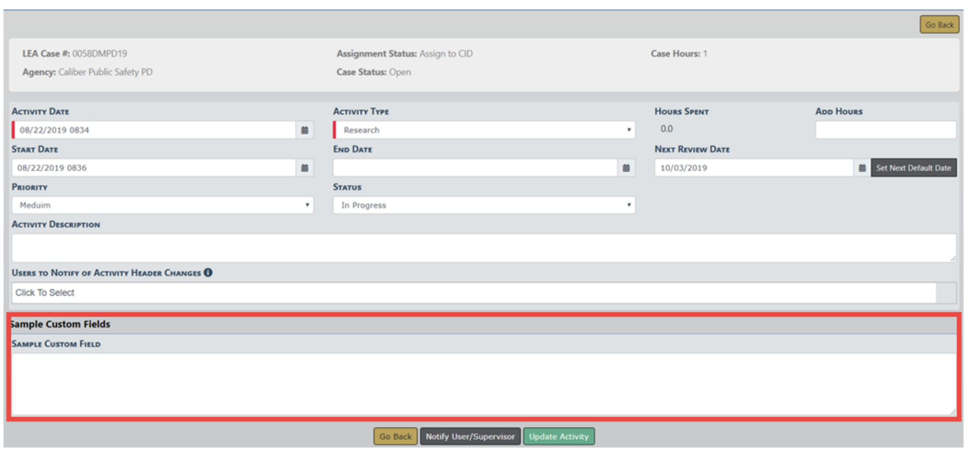
7. Optionally, associate Warrants to the Case Activity. Click on **Select Case Warrant** to choose a Warrant related to the Case if any, or click on **Associate Warrant** to search for and select a Warrant that is not related to the Case.



8. Optionally, click on the **Associate Field Arrest** to search for and select a Field Arrest. For more information on searching and selecting Field Arrests, refer to "Field Arrest" on page 355.

9. People, Vehicles existing on Incidents, Field Contacts, and Field Arrests associated to a Follow-up Investigative Case will appear to relate to a case activity. If People and Vehicles exists, click **Select Case Involved Name** in the Involved Names and Organizations section to relate a name and business. Click **Select Case Involved Vehicle** in the Involved Vehicles section to relate a vehicle.

10. **Custom Field** support allows agencies to capture custom data by adding agency specific data elements, such as text fields, list of values, checkboxes, etc. The **Custom Field** feature must be enabled for it to be available. If your agency is using Custom Fields and is configured for Case Activity, the custom fields appear at the bottom of the form.

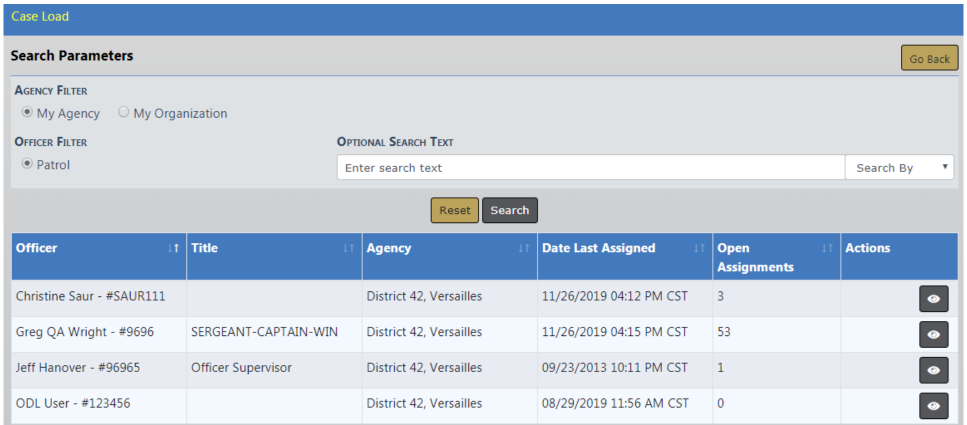


11. When finished updating the Case Activity, click **Go Back** to return to the previous screen.

Case Load

Use the following procedure to view case loads for your assigned users.

1. Select the **Case Load** option from the *Case Management* submenu or click the **Case Load** link on the *Incidents* page to open the **Case Load** page.



2. Filter the listings on this page using the **My Agency** or **My Organization** radio button that appear in the upper left corner.

3. If needed, type text in the **Search** text box to further limit your search to cases containing that specific text string. You can also select from the **Search By** drop-down box.

4. Click the **Search** button to display just those cases or click **Reset** to clear the criteria.

5. Click the view icon  under the *Actions* column on a particular officer in the grid to view that officer's cases.

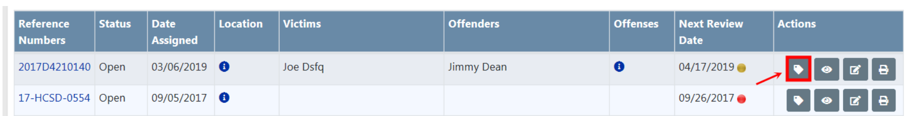
For convenience, the **Offenses** are listed under the *Incident Summary* column.

6. If an **MT** link exists in the *Actions* column, click it to display a monthly total for that user.

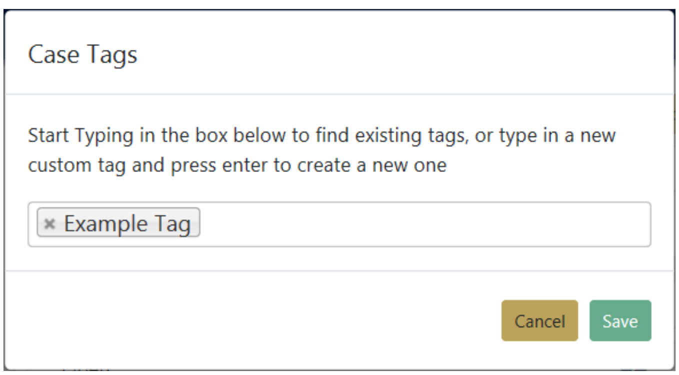
Investigative Case Tags

In *My Active Cases*, you can **Tag** cases with keywords you choose. This allows investigators to increase efficiency by creating their own tags to group cases based on similar actions, suspects, or other information. For more information on accessing *My Active Cases*, refer to "Navigating Throughout the Case" on page 475.

Click on a **Tag** icon .

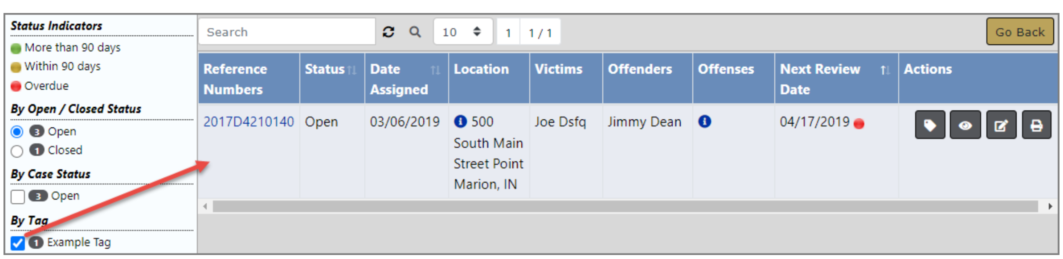


In the *Case Tags* window, start typing in the box to find existing tags, or type a new custom tag and press enter to create a new tag. Add one or more tags.



Click **Save** to create the tag and return to *My Cases*.

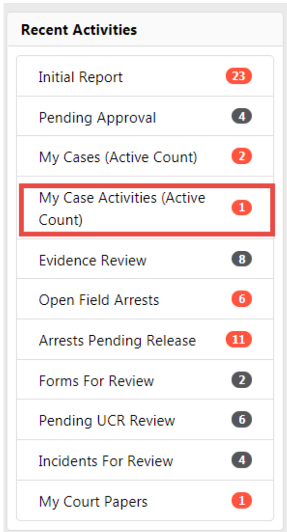
View case counts by *Case Tag*.



Show My Case Activities

You have the ability to view a list of your active and completed Case Activities.

1. From your *Home* page, click on the **My Case Activities** link under *Recent Activities*.

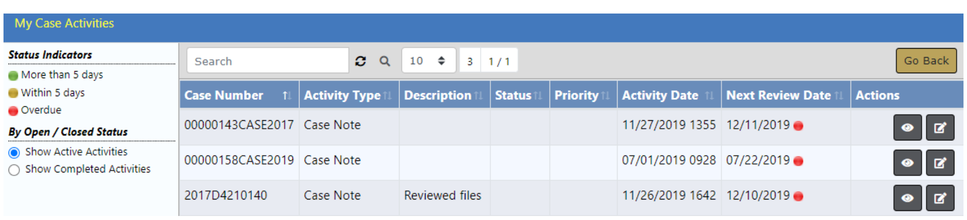


Note: You must have at least one Case Activity for this link to appear.

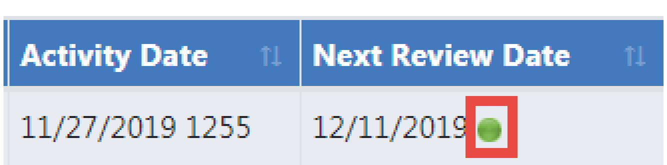
Color coding provides awareness to assigned users of upcoming and overdue active case activities.

- A red circle indicates one or more case activities are overdue.
- A yellow circle indicates one or more case activities are coming due within 90 days.

2. The *My Case Activities* page appears. Click on the **Show Active Activities** or **Show Completed Activities** button to toggle between the two lists. Whichever button you select, the corresponding list appears in the grid.



The *Next Review Date* column uses color indicators that quickly identifies cases with upcoming review dates, or have surpassed the next review date.



3. With appropriate permissions, you can view or edit your Case Activities. Click on the view or edit icon that appears in the *Actions* column, respectively.

Note: You can edit the Case Activity even when the status is set to Complete.

For more information on updating the Case Activity, refer to UpdateCaseActivity.htm.

Print Case

You can print a report wherever the print icon  or print button 

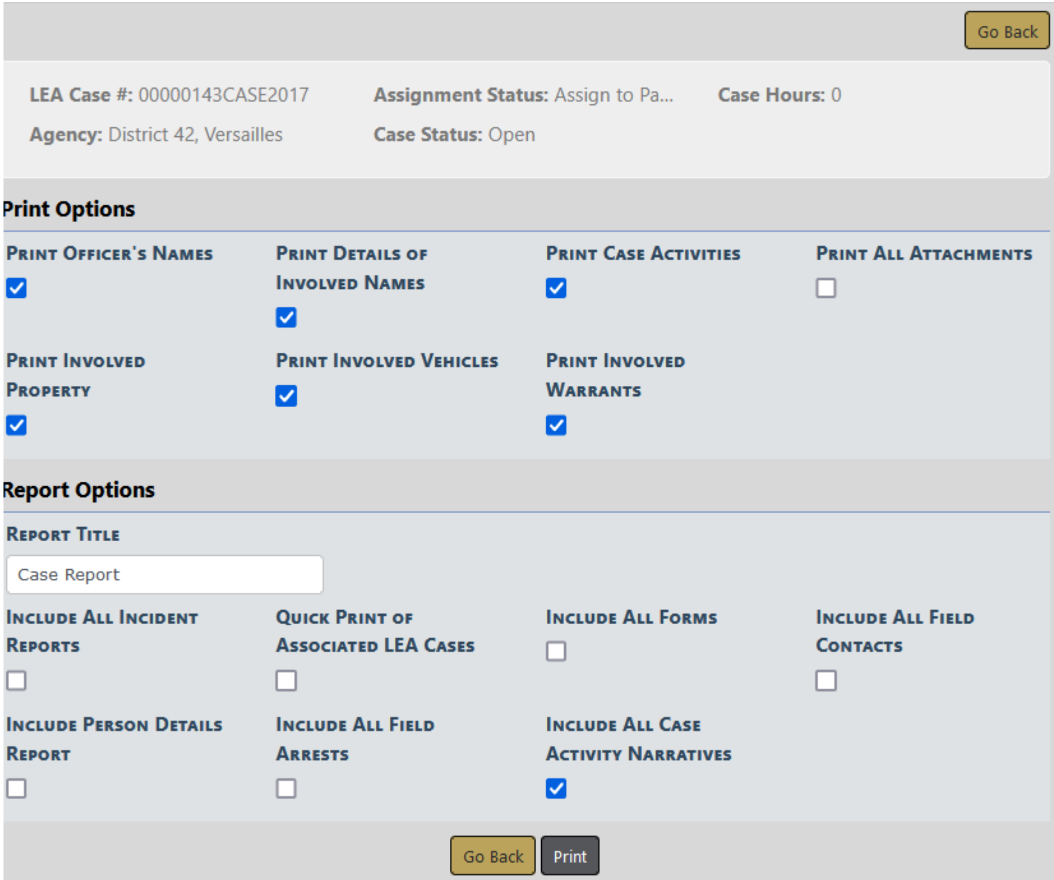
displays.

Differences between the print icon and print button:

- 
  - Generates a PDF document in a new tab that you can either send to the printer or save to a file.
  - Additional print options are not available.
- 

  - May display additional *Print* and *Report Options* that allows you to include or exclude various information on the report.

Note: In some instances, such as on the *Case Activity Narrative*, this button generates a PDF document without providing additional print options.



1. Select the options you want to include on the report. Certain options may display additional fields when checked.

2. Enter a custom **Report Title** if you wish.

3. Click **Print** when finished making your selections.

4. A PDF document appears in a new tab. Either print directly to the printer or save to a file.

Chapter 24. Evidence/Property Mgmt Module

Evidence/Property Mgmt Module Overview

The **Evidence/Property Management Module** captures descriptive information about property that is introduced as Evidence or Held Property. This property can be associated with incidents, cases, offense, and other system modules. Unlimited multimedia files and documents (receipts, court documents, etc.) can be associated.

Property must exist in the *Master Property Index* for it to be introduced as evidence or held property. For information on Master Indices, refer to "Master Indices Overview" on page 83.

The evidence custodian is responsible for tracking evidence or held property after an officer has placed it in one of the temporary storage locations. The evidence custodian typically takes the property from the temporary location and places it in a more permanent location in the agency's evidence or held property room. Any user with appropriate permissions can dispose evidence. Every action taken with a piece of property can be tracked in the Online RMS **Evidence/Property Management Module**.

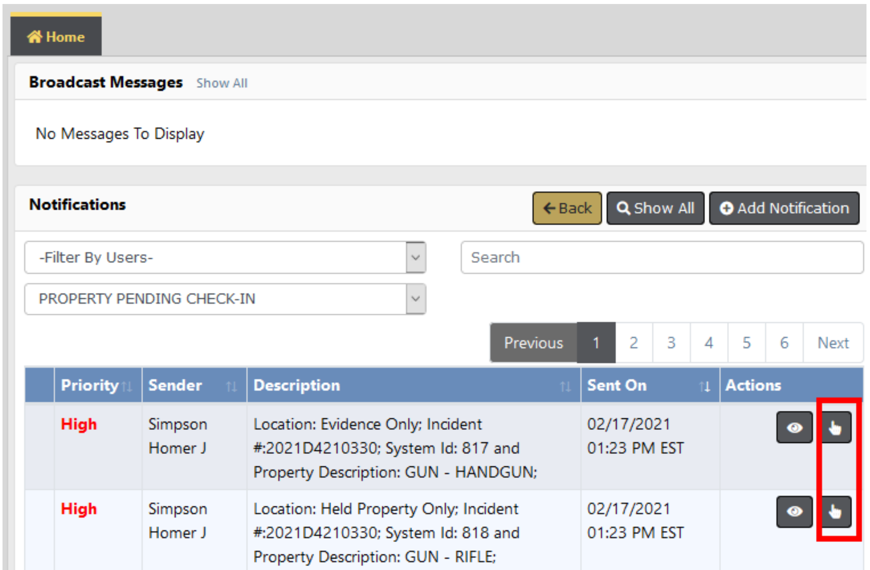
Other available features:

- A full *Chain of Custody* log is captured and can be searched.
- The system supports bar code reader for easy *check-in* and *checkout*.
- *Mass Checkout* can be performed when there are many pieces of evidence or held property associated with the same incident.
- Evidence *Disposition* and *Disposal* are tracked by the system.

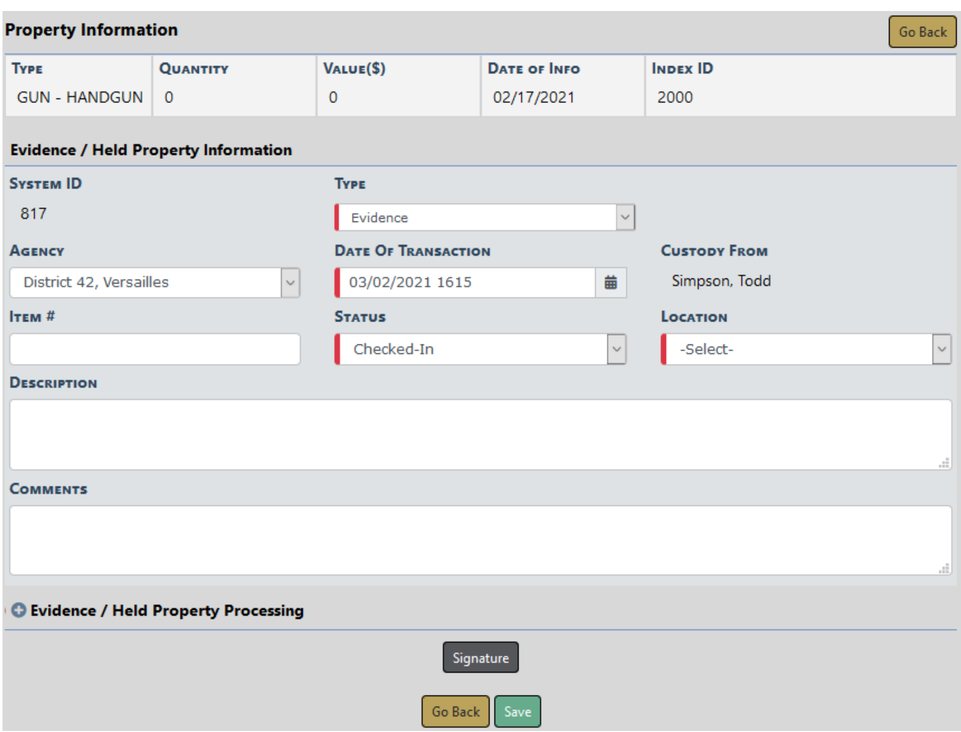
Check-In From Notification

The first step in taking ownership of a piece of evidence or held property is to complete a **Check-In**. This can be accomplished by taking *Action* on the system generated **Notification** which is the most common process. The **Check-In** process is also available within the **Evidence/Property Management Module**. For more information refer to "Check-In" on page 505.

Click on the Select icon  to **Take Action**.



Complete the required fields, then click the **Save** button.



The **Description** and **Comments** can be edited by the custodian, and **Evidence Processing** can also be added.

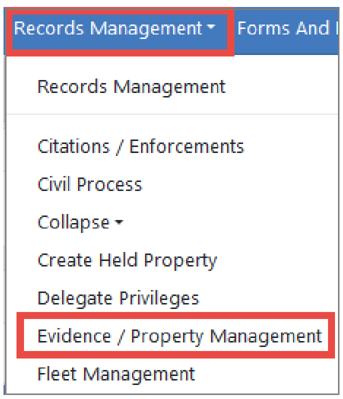
Select the **Location** and make any other necessary changes.

Click the **Signature** button to sign if needed, or click **Save** to take the action. The Notification no longer appears on the *Home* screen.

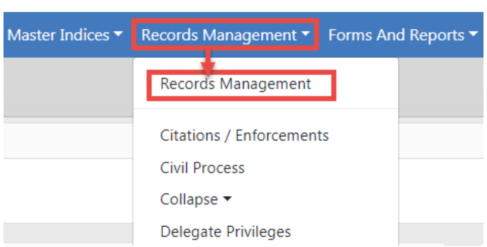
Evidence/Property Mgmt Access

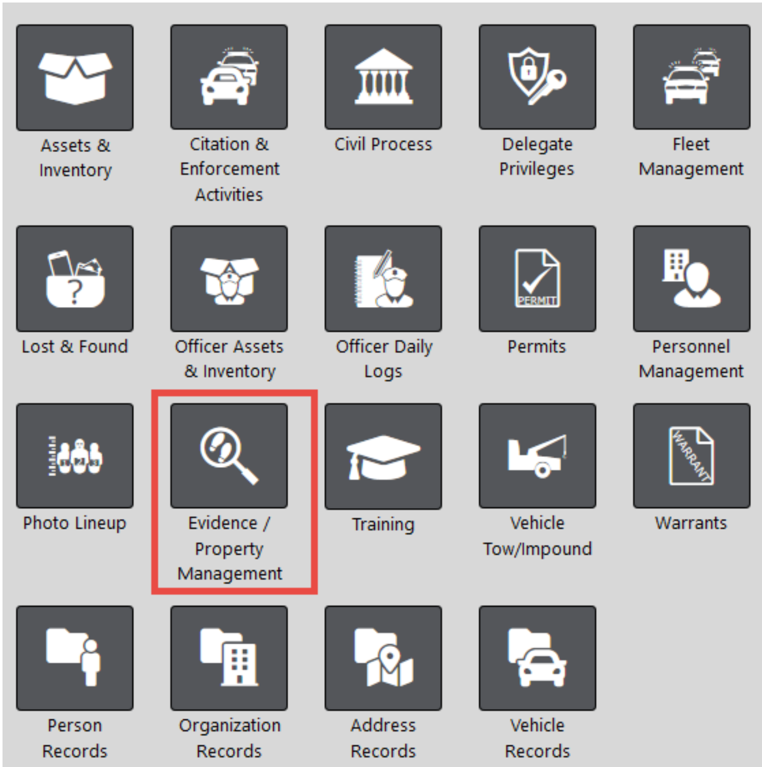
There are various access points to Evidence/Property Management functions, depending on your permissions:

- To open *Evidence/Property Management*, click on the **Records Management** top menu, then click on the **Evidence/Property Management** sub-menu.



Or, click on the **Records Management** top menu, click **Records Management** again, then click **Evidence/Property Management**.





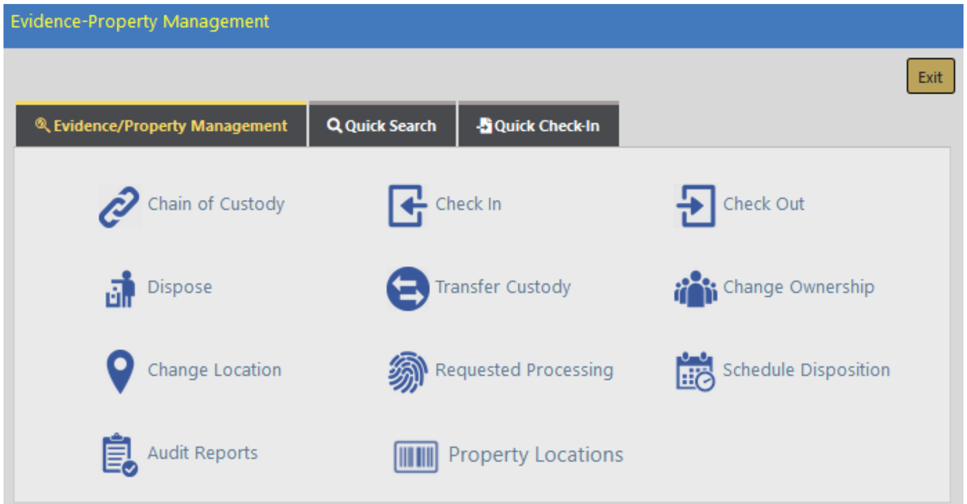
For more information, refer to "Evidence/Property Management Landing Page" on the facing page.

- To quickly create a Master Property Index record for held property, click on the **Records Management** top menu, then click on the **Create Held Property** sub-menu.

Note: This option is only available to users with the *Evidence - Create Held Property* permission.

The *Add Property* form opens. For detailed instructions, refer to "Adding Property" on page 118.

Evidence/Property Management Landing Page

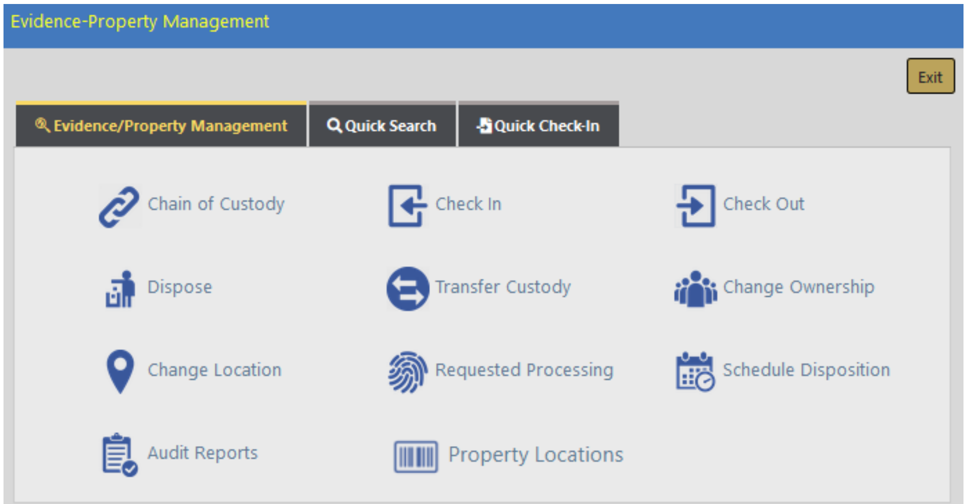


The *Evidence/Property Management* landing page contains three tabs:

- Evidence/Property Management
  - Contains a link to all the property management functions. The *Evidence-Property Management* screen defaults to this tab.
- Quick Search
  - Allows you to search property records by **System ID**, **Incident Report #**, or both. Additional search options include **Officer First Name**, **Officer Last Name**, and **Officer Badge #**. You must fill in at least one. (Name search is available in other searches as well, not just Quick Search.)
- Quick Check-In
  - Allows you to **Check In** property quickly by using the barcoded **System ID** and **Location Code**.

For details on accessing the *Evidence/Property Management* module, refer to "Evidence/Property Mgmt Access" on page 499.

Evidence/Property Management Tab

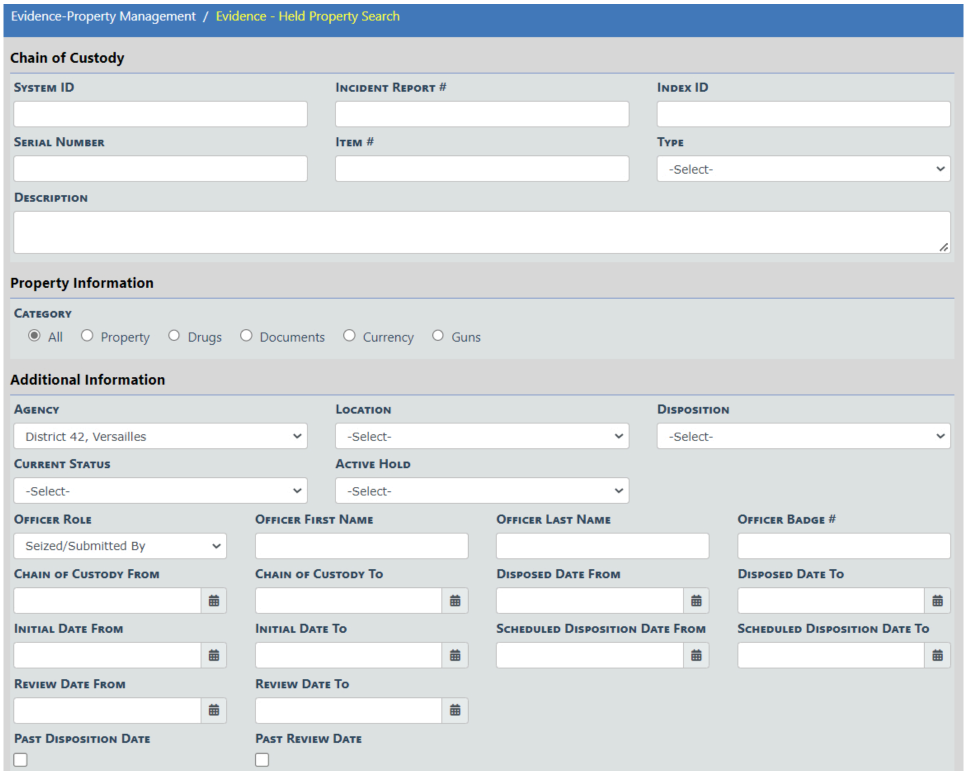


The *Evidence/Property Management tab* contains several links.

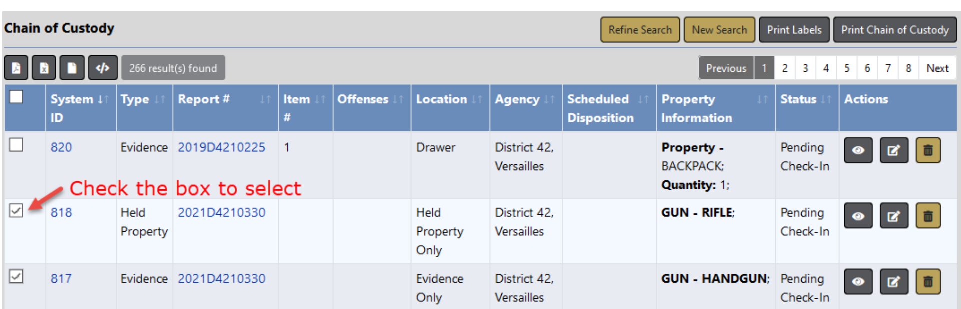
For details on accessing the *Evidence/Property Management* module, refer to "Evidence/Property Mgmt Access" on page 499.

Chain of Custody

This screen has a wide range of functionality. The evidence custodian can search using any of these fields (fields may change and offer drop-down selections based on category selection):

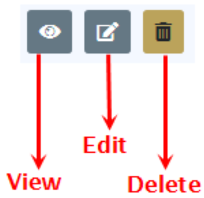


Enter your search criteria then click the **Search** button to display the *Chain of Custody Search Results* screen.

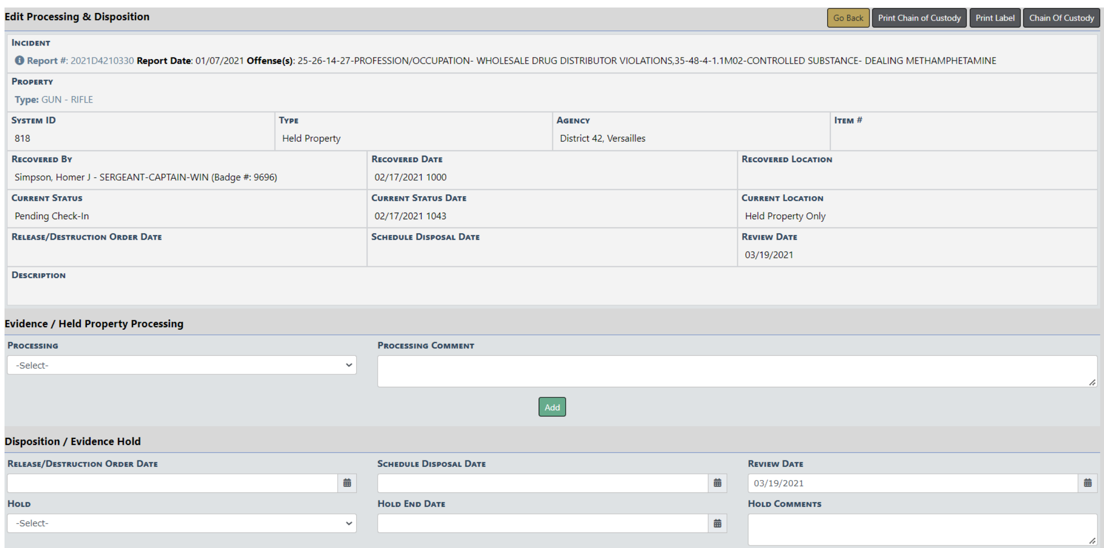


Select one or more records to **Print Labels** or **Print Chain of Custody** for the selected items. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 529.

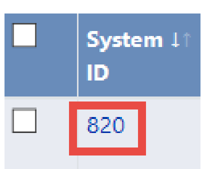
Will appropriate permissions you can **View**, **Edit**, or **Delete** specific Chain of Custody records by clicking on the appropriate icon under the *Actions* column. For example, if you have appropriate permissions to edit a chain of custody, you have the option to add attachments using the **+ Add Attachment** link at the bottom of the screen. If one or more icons are absent then you do not have authority to perform that particular action.

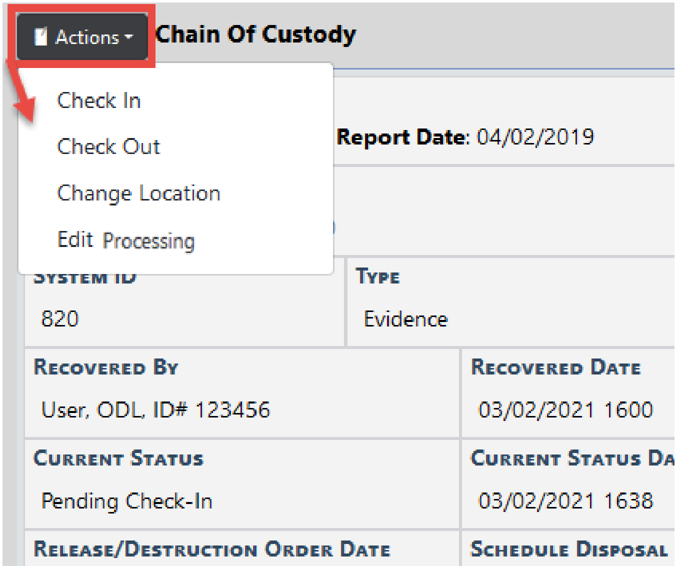


From the *Edit Processing & Disposition* screen you may place a hold on a piece of evidence, add attachments, add comments, etc.

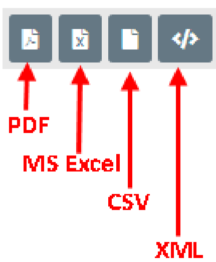


Click on the **System ID** link to view additional Chain of Custody **Action** items.





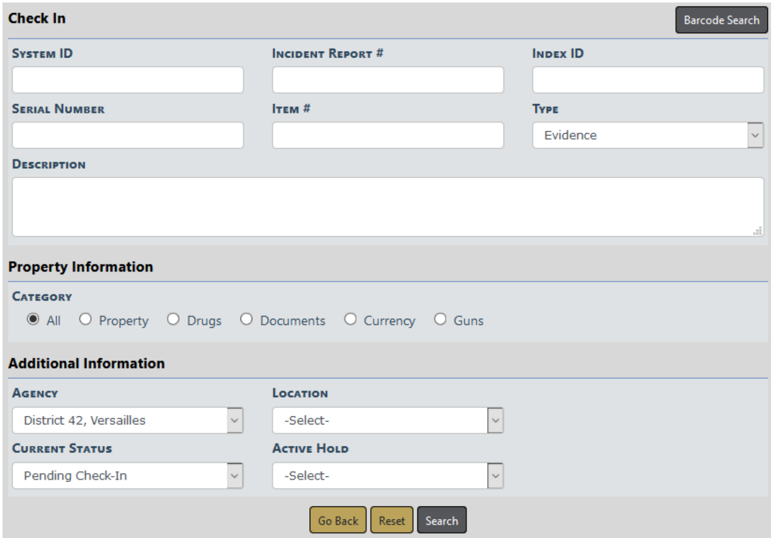
You can export the search results to various file types:



For more information on exporting results, refer to "Export Search Results" on page 36.

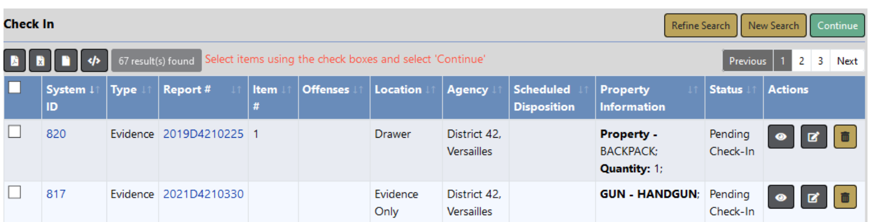
Check-In

The **Check-In** link allows the user to search for evidence or held property to **Check-In**. The *Evidence/Held Property Search* screen defaults to search on *Pending Check-In*, but you can also search on *Checked-Out* for purposes of checking it back in.

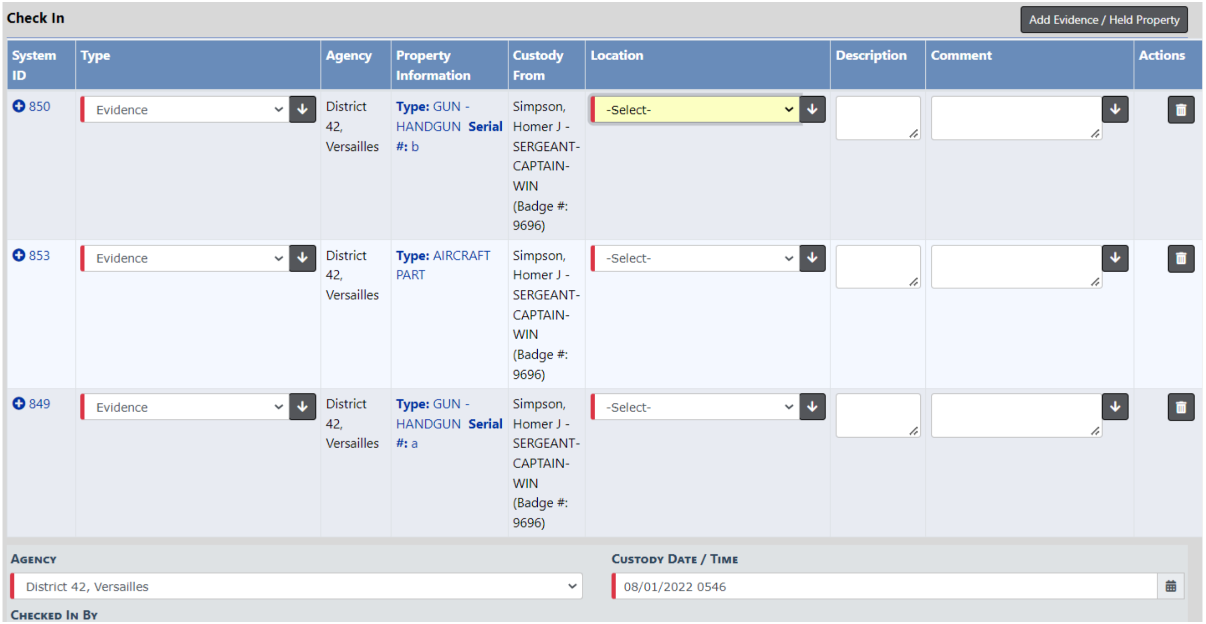


Enter your search criteria then click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The *Check In Search Results* screen appears.



Check the box on the left of the record you want to Check In then click the **Continue** button to display the *Check In* screen. (You may select multiple records for mass check-in.)



Choose the **Type** from the drop-down list.

Choose the **Location** from the drop-down list.

> **Note:** The **Location** values are filtered based on whether the item is evidence or held property.

Add a **Description** and **Comment** for each item as required.

If you wish, you can also add additional evidence items to the **Check In** list by clicking on the **Add Evidence** button on the top right of the screen. The **Add Evidence / Held Property** button takes you back to the *Evidence/Held Property - Check In* screen. Follow the same process as above to search and select the Evidence you want to add then click **Continue**. The additional Evidence is then added to the **Check In** list.

Make other changes if needed, then click the **Signature** button to sign if necessary.

> **Note:** RMS now supports dual to/from signatures for both parties involved in evidence transfers (where applicable). A user may also configure a PIN (Personal Identification Number) by editing their profile and then entering a PIN to enter their signature. Only the person whose PIN is being created may log in and create their PIN.

Click **Save** to save your changes and remain on the page to print **Receipts**, **Labels**, or **Chain of Custody**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 529.

Click **Save & Exit** to save your changes and exit the page.

Note: If you are not in a *Multi-tier Organization*, the **Status** will default to *Check-In* and the **Location** will default to the previously checked in location, if it exists.

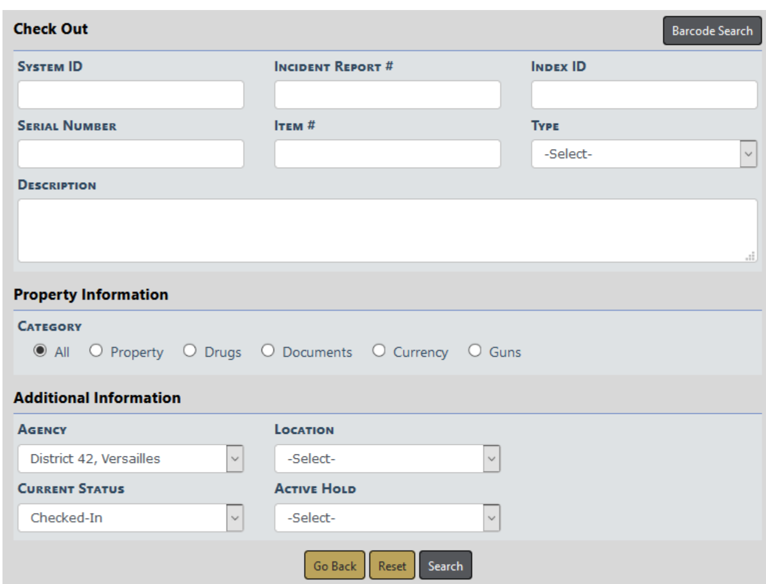
Note: An *Evidence Custodian* taking action on an *Evidence Pending Check-In* notification will default the **Location** to the previously checked in location, if the **Status** is set to *Check-In*.

Note: Qualified administrators may set the *EVIDENCE_DELETE_FROM_INCIDENT* maintenance value from Y to N. Set to **Y** to delete evidence when property is deleted from an incident. Set to **N** to maintain the evidence record when property is removed from the incident.

Check-Out

The **Check-Out** link will allow the user to search for property to **Check-Out**. The **Status** of the property must be *Checked-In* or *Check-out* to take this action.

Once the item is located and selected, you can document the person it is going to and the destination.

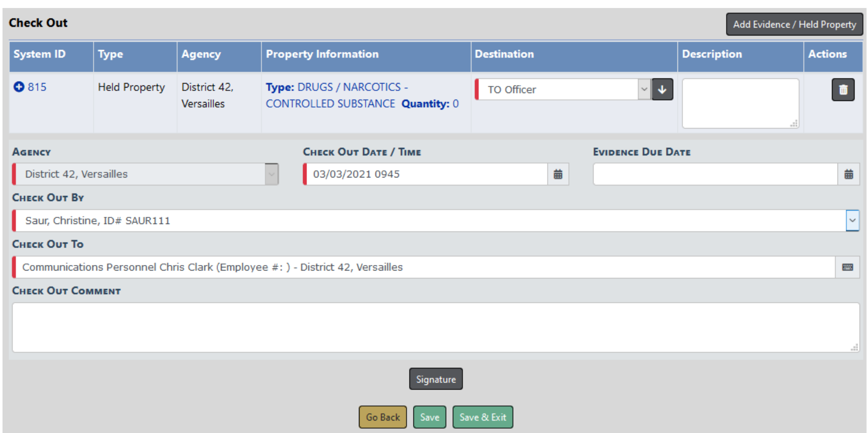


Select a **Category** and enter other search criteria. The fields below the Category change based on your Category selection.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The *Check Out Search Results* screen appears.

Select one or more records you want to Check Out then click **Continue** to display the *Check Out* screen.



Choose the **Destination** from the drop-down list, enter **Check Out To** and other necessary data.

If you wish, you can also add additional evidence or held property to the **Check Out** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen to open the *Evidence - Held Property Search Check Out* screen. Follow the same process as above to search and select the evidence or held property you want to add, then click the **Continue** button. The additional records are then added to the **Check Out** list.

Click the **Signature** button to sign if necessary.

> **Note:** RMS now supports dual to/from signatures for both parties involved in evidence transfers (where applicable). A user may also configure a PIN (Personal Identification Number) by editing their profile and then entering a PIN to enter their signature. Only the person whose PIN is being created may log in and create their PIN.

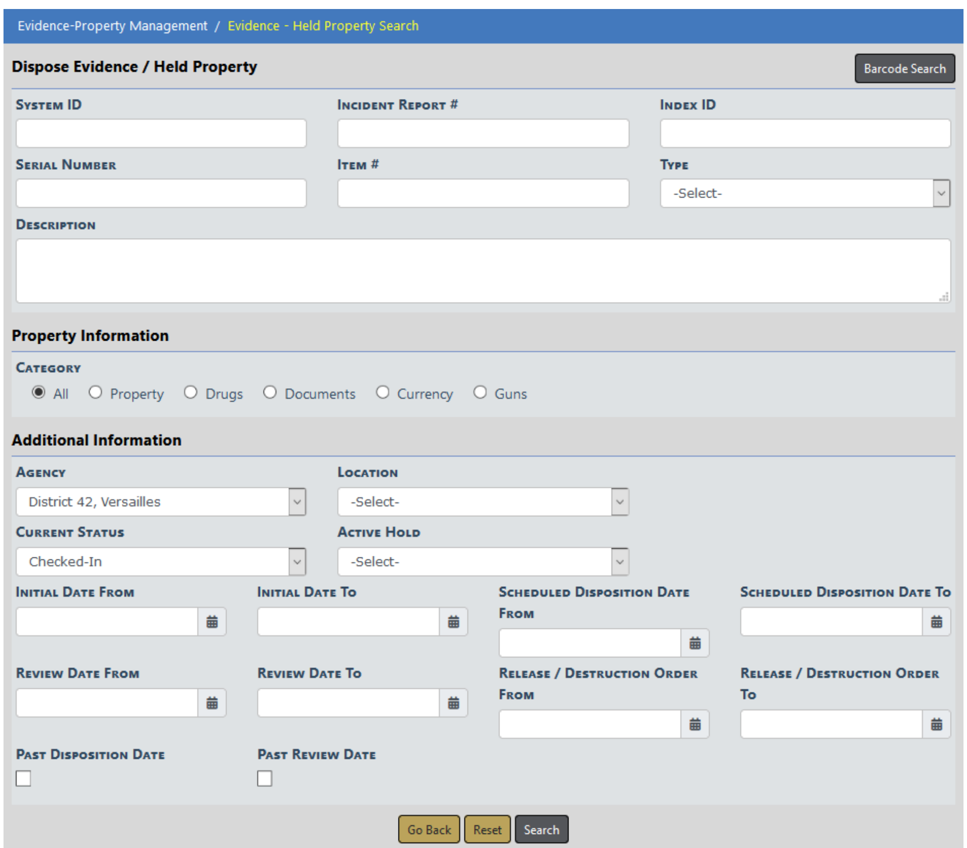
Click **Save** to save your changes and remain on the page to print **Receipts**, **Labels**, or **Chain of Custody**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 529.

Click **Save & Exit** to save your changes and exit the page.

Dispose

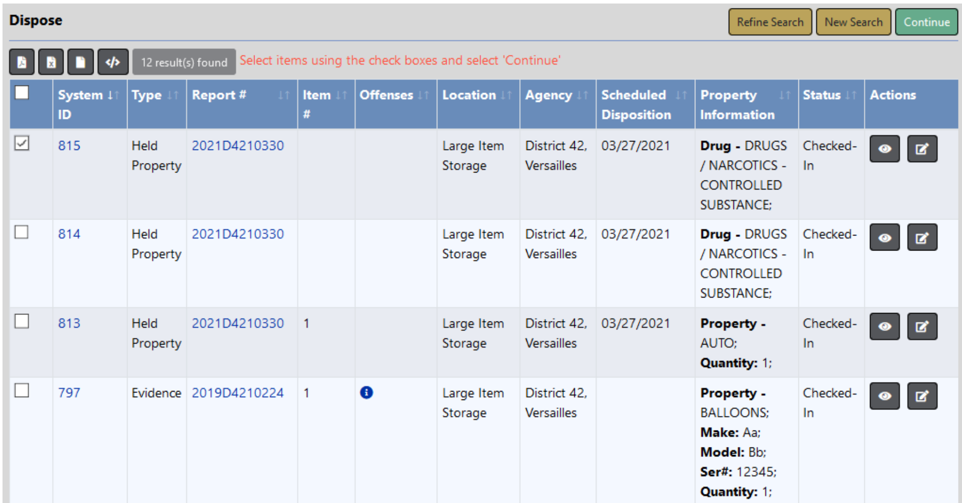
Evidence custodians will use this feature to search for evidence or held property requiring disposal from your evidence or held property room. The **Status** of the evidence or held property must be *Checked-In* or *Checked-out* to take this action. **Dispose** is done when evidence or held property is released to its owner or other person, auctioned, destroyed, or given to another agency.

Click on the **Dispose** link on the **Evidence/Property Management** page to display the *Evidence - Held Property Search* screen.

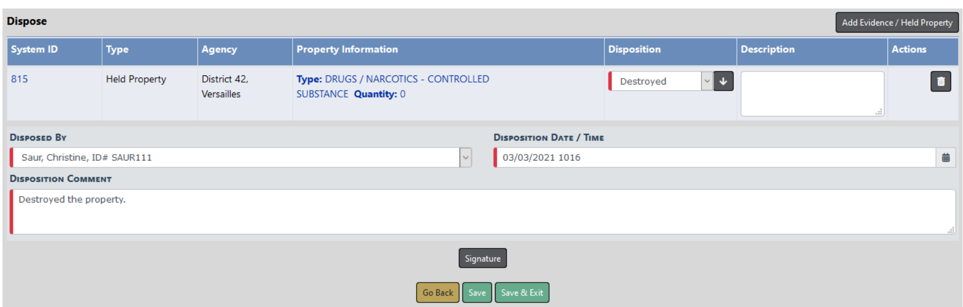


Select a **Category** and enter other search criteria. The fields below the Category change based on your Category selection.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.



Select one or more records then click **Continue** to display the *Dispose* screen.



Note: The **Disposition Date/Time** defaults to the current date. You can change the **Disposition Date/Time**; however, a warning message appears if the date is prior to the check in date.

If you wish, you can also add additional Evidence items to the **Dispose** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen.

Click the **Signature** button to sign if needed.

Note: RMS now supports dual to/from signatures for both parties involved in evidence transfers (where applicable). A user may also configure a PIN (Personal Identification Number) by editing their profile and then entering a PIN to enter their signature. Only the person whose PIN is being created may log in and create their PIN.

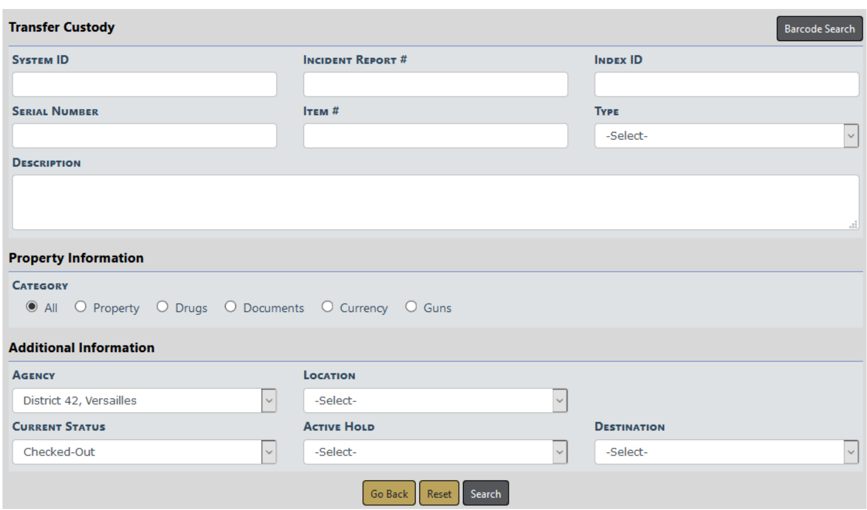
Click the **Save** button to update and **Print Chain of Custody**, **Print Labels**, or **Print Receipt**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 529.

Click the **Save & Exit** button to apply your changes and exit without print options.

Transfer Custody

The **Transfer Custody** link is used when a piece of evidence or held property that is **Checked-Out** transfers possession to another person. For example, if the original officer taking evidence to court gets sick and hands the evidence to another officer. The Evidence Custodian can show that **Transfer of Custody** within the Online RMS **Evidence/Property Management Module**.

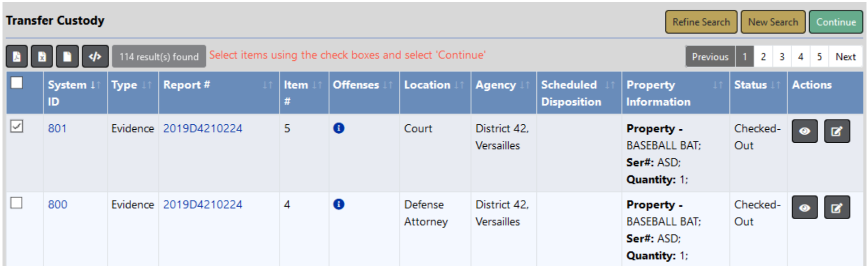
Click on the **Transfer Custody** link to display the *Evidence - Held Property Search - Transfer Custody* screen.



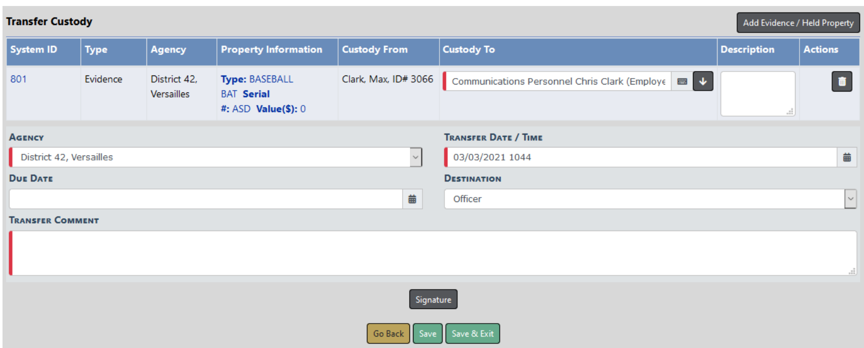
Select a **Category** and enter other search criteria. The fields below the Category change based on your Category selection.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The *Transfer Custody Search Results* screen appears.



Select one or more records you want to transfer then click **Continue** to display the *Transfer Custody* screen.



Enter the **Custody To**, choose the **Destination** from the drop-down list, and enter a **Transfer Comment** and other necessary data.

If you wish, you can also add additional evidence or held property to the **Transfer Custody** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen to open the *Evidence - Held Property Search Transfer Custody* screen. Follow the same process as above to search and select the evidence or held propertyyou want to add, then click the **Continue** button. The additional records are then added to the **Transfer Custody** list.

Click the **Signature** button to sign if necessary.

> **Note:** RMS now supports dual to/from signatures for both parties involved in evidence transfers (where applicable). A user may also configure a PIN (Personal Identification Number) by editing their profile and then entering a PIN to enter their signature. Only the person whose PIN is being created may log in and create their PIN.

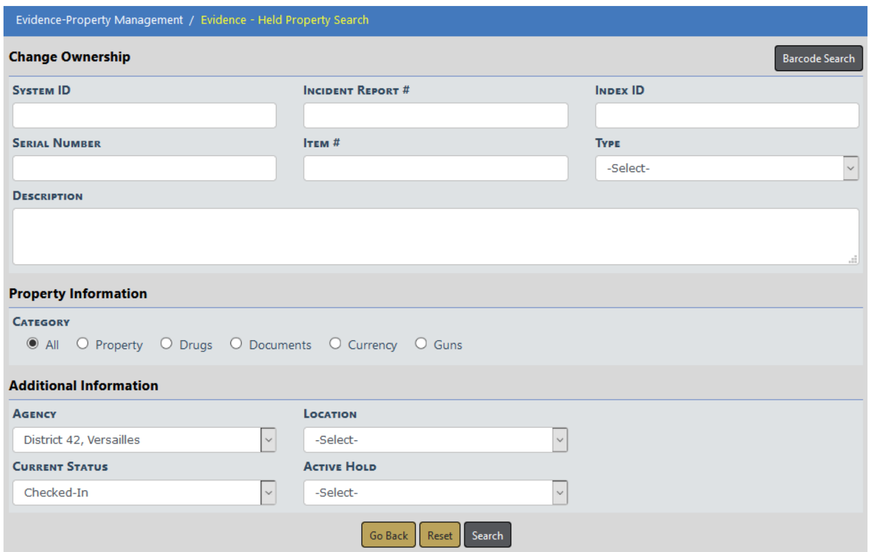
Click **Save** to save your changes and remain on the page to print **Receipts**, **Labels**, or **Chain of Custody**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 529.

Click **Save & Exit** to save your changes and exit the page.

Change Ownership

This link will be used to transfer evidence or held property from one Caliber Public Safety agency in a work group to another. The **Status** of the evidence or held property must be *Checked-In* or *Checked-out* to take this action.

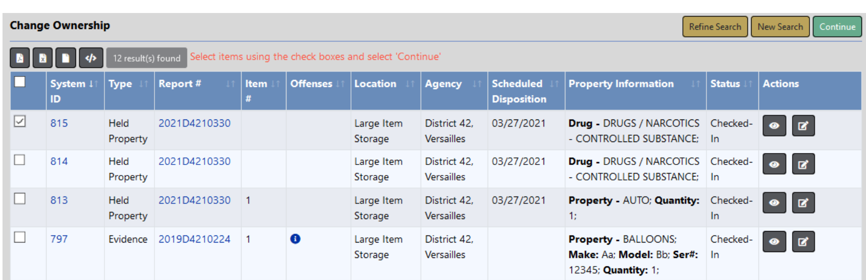
Click on the **Change Ownership** link to display the *Evidence - Held Property Search - Change Ownership* screen.



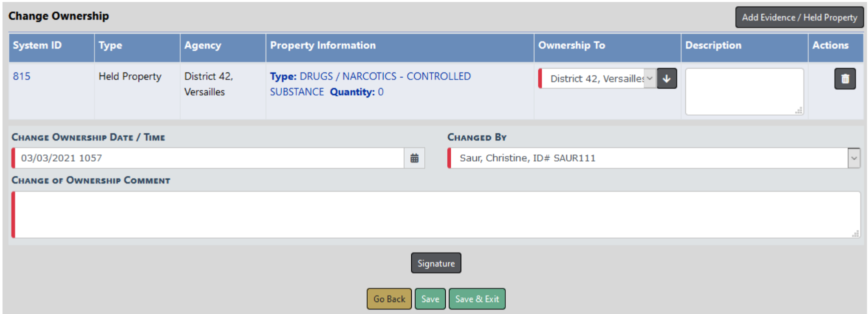
Select a **Category** and enter other search criteria. The fields below the Category change based on your Category selection.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The *Change of Ownership Search Results* screen appears.



Select one or more records then click **Continue** to display the *Change Ownership* screen.



Enter the **Change of Ownership Comments**, choose the **Ownership To** from the drop-down list if different than what displays, and modify other necessary data.

If you wish, you can also add additional evidence or held property to the **Change Ownership** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen to open the *Evidence - Held Property Search Change Ownership* screen. Follow the same process as above to search and select the evidence or held propertyyou want to add, then click the **Continue** button. The additional records are then added to the **Change Ownership** list.

Click the **Signature** button to sign if necessary.

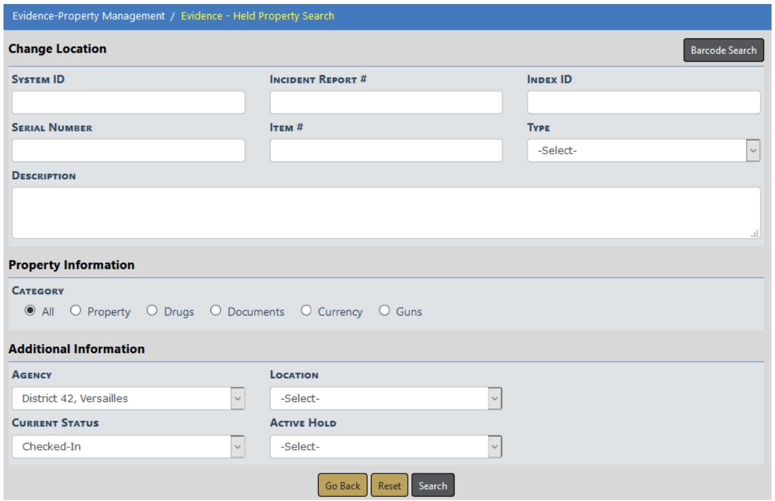
Click **Save** to save your changes and remain on the page to print **Receipts**, **Labels**, or **Chain of Custody**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 529.

Click **Save & Exit** to save your changes and exit the page.

Change Location

The Evidence Custodian can use this link to show evidence or held property movement from one place to another. The **Status** of the evidence or held property must be *Checked-In* or *Check-out* to take this action. An example would be moving evidence from one shelf to another within the evidence or held property room. Another example would be consolidating evidence in temporary lockers to make lockers accessible for more evidence or held property.

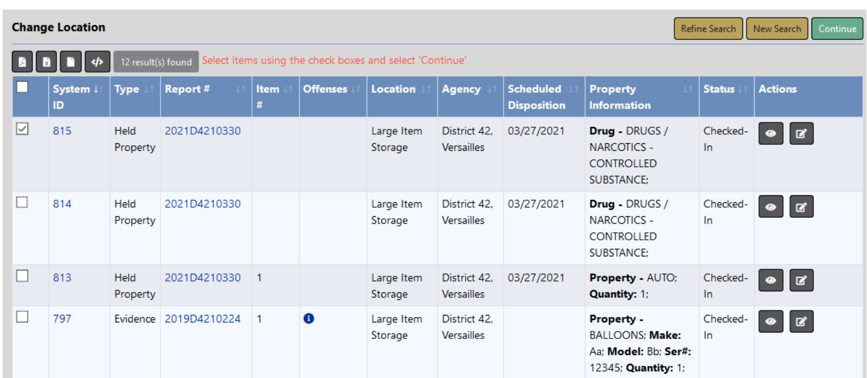
Click on the **Change Location** link on the **Evidence/Property Management** page to display the *Evidence - Held Property Search - Change Location* screen.



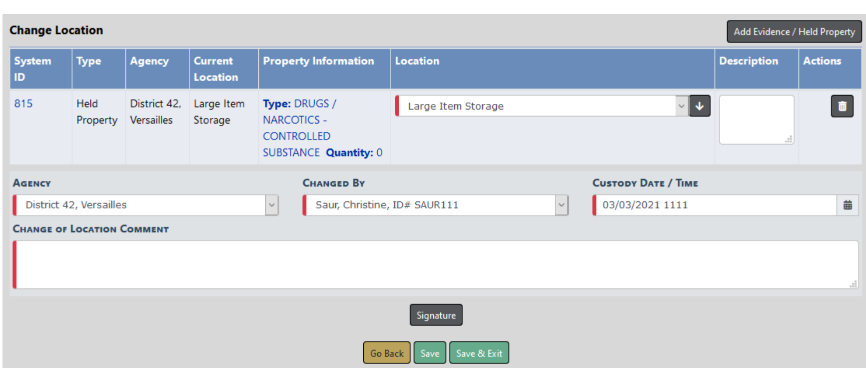
Select a **Category** and enter other search criteria. The fields below the Category change based on your Category selection.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The *Change Location Results* screen appears.



Select one or more records then click **Continue** to display the *Change Location* screen.



Changed By defaults to the logged in user. Enter comments, choose the **Location** from the drop-down list, and enter or change other necessary data.

Note: The **Location** drop-down list depends on the Status and Type of evidence/property.

If you wish, you can also add additional evidence or held property items to the **Change Location** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen. The **Add Evidence/Held Property** button takes you back to the *Evidence - Held Property Search - Change Location* screen. Follow the same process as above to search and select the records you want to add then click **Continue**. The additional records are then added to the **Change Location** list.

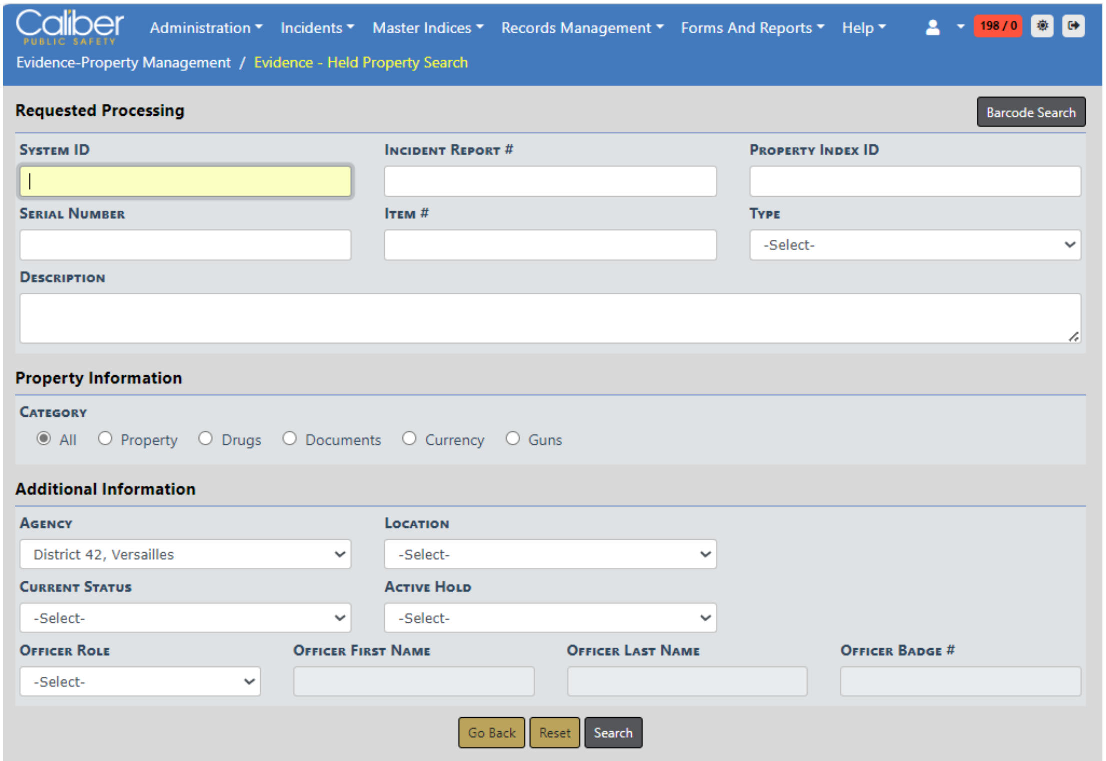
Click the **Signature** button to sign if necessary

Click **Save** to save your changes and remain on the page to print **Receipts**, **Labels**, or **Chain of Custody**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 529.

Click **Save & Exit** to save your changes and exit the page.

Requested Processing

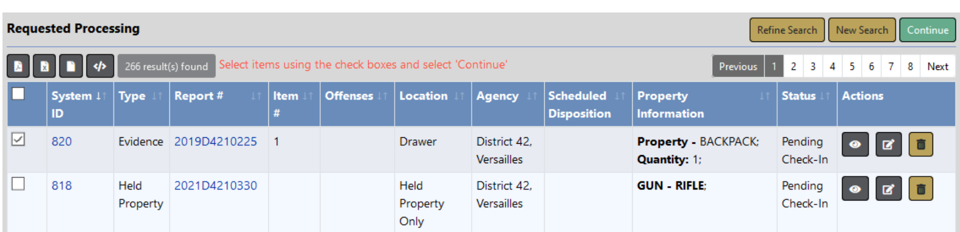
Click on the **Requested Processing** link to display the *Evidence - Held Property Search - Requested Processing* screen.



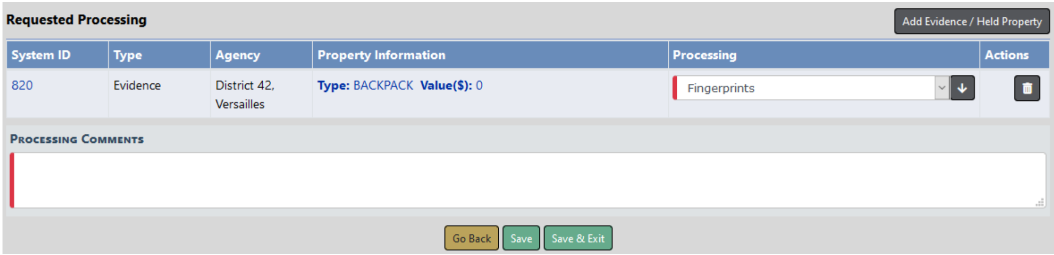
Select a **Category** and enter other search criteria into fields that appear below the Category based on your Category selection. For example, you may choose the **Officer Role** as part of the entry.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The *Requested Processing Search Results* screen appears.



Select one or more records you want to process then click **Continue** to display the *Requested Processing* screen.



Choose **Processing** from the drop-down list, enter **Processing Comments** and other necessary data.

> **Note:** Your agency may elect to require at least one evidence Processing through a configuration setting. Refer to your agency administrator for more information.

If you wish, you can also add additional evidence or held property to the **Requested Processing** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen to open the *Evidence - Held Property Search Requested Processing* screen. Follow the same process as above to search and select the evidence or held propertyyou want to add, then click the **Continue** button. The additional records are then added to the **Requested Processing** list.

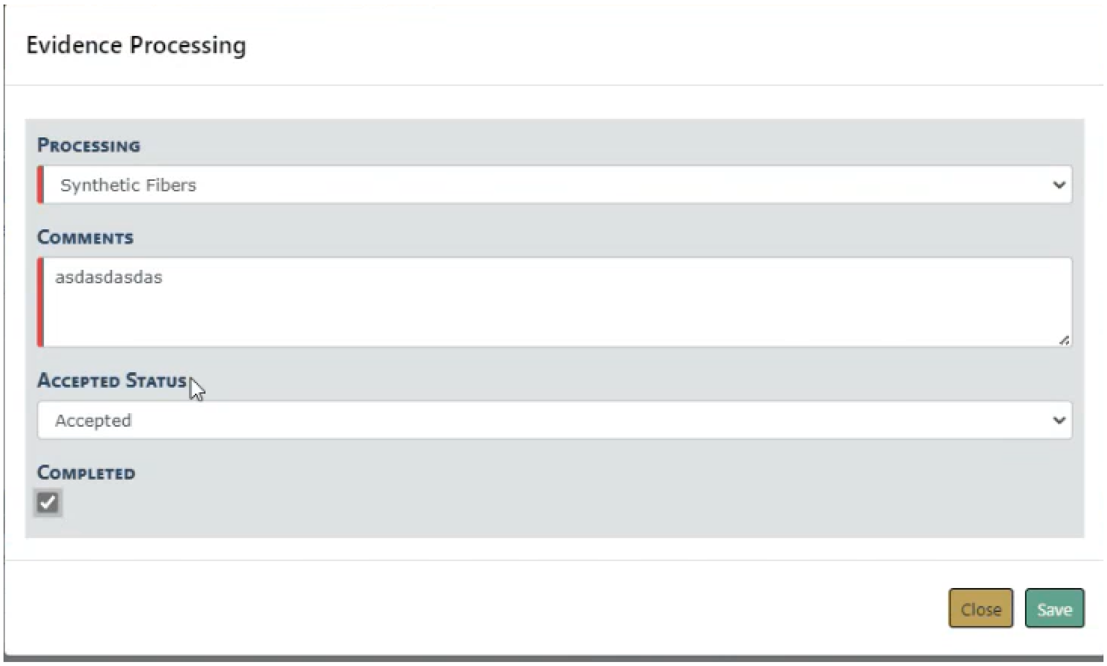
Click **Save** to save your changes and remain on the page where you can optionally **Print Chain of Custody**, **Print Labels**, and **Print Receipt**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 529.

Click **Save & Exit** to save your changes and exit the page.

Flagging Processing Accepted/Rejected/Completed

RMS now allows the user to flag a piece of evidence as accepted or rejected, and to flag processing completed when processing of that piece of evidence has been completed. Process status can be changed in the following ways:

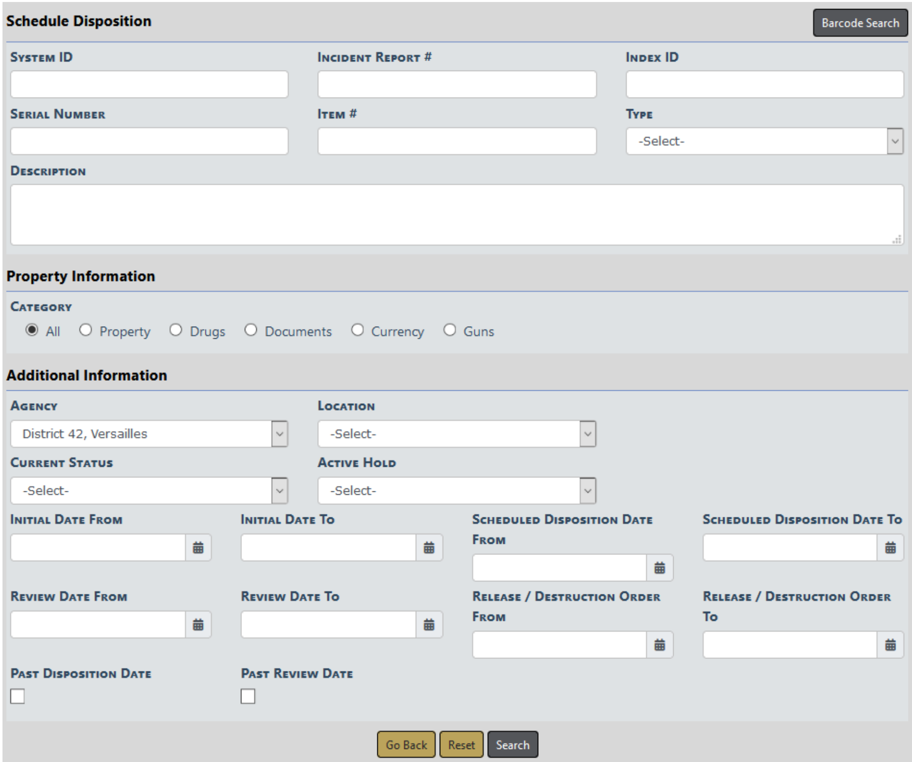
- When creating evidence
- When editing an incident
- When checking in evidence



The checkbox enables the user to flag evidence as having completed processing. Evidence now is searchable as to whether it has or has not completed processing.

reSchedule Disposition

Click on the **Schedule Disposition** link to display the *Evidence - Held Property Search - Schedule Disposition* screen.

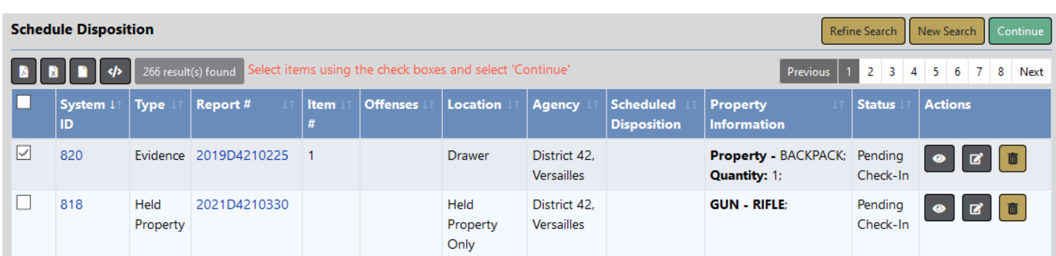


Select a **Category** and enter other search criteria into fields that appear below the Category based on your Category selection.

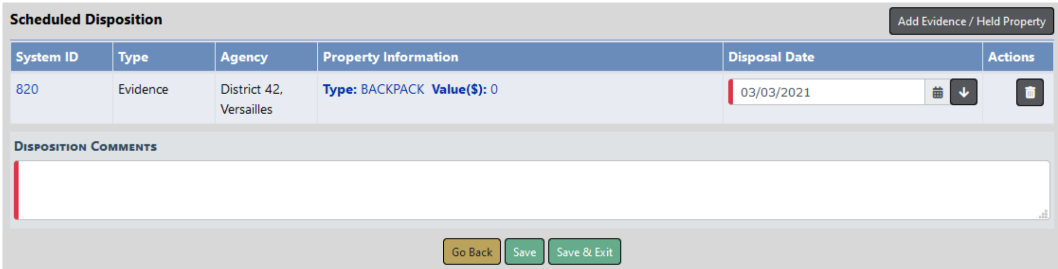
You can **Schedule Disposition** in mass by searching for Evidence/Held Property related to an incident report, based on a property location, property status, barcode scanning, or Initial Date range and other relevant dates.

Click **Search**. Or if you are equipped with a barcode scanner, click the **Barcode Search** button to search records by scanning the barcode.

The *Schedule Disposition Search Results* screen appears.



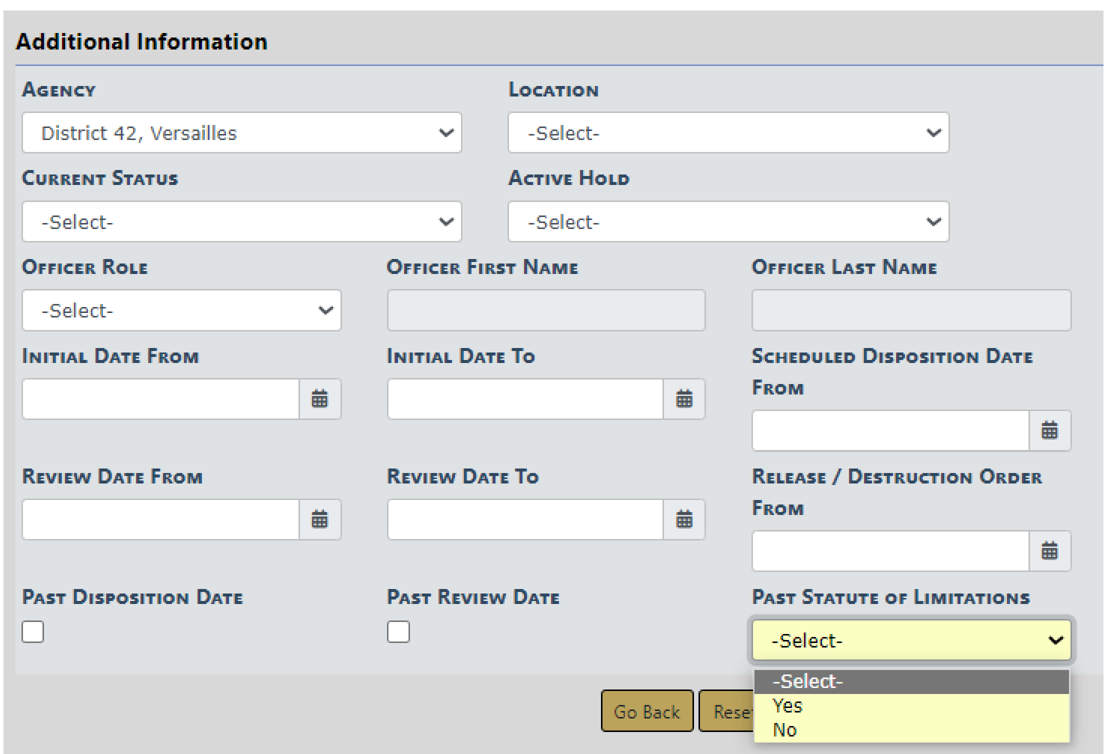
Select one or more records you want to schedule the disposition then click **Continue** to display the *Schedule Disposition* screen.



Choose **Disposal Date** from the drop-down list and enter **Disposition Comments**.

If you wish, you can also add additional evidence or held property to the **Scheduled Disposition** list by clicking on the **Add Evidence/Held Property** button on the top right of the screen to open the *Evidence - Held Property Search Scheduled Disposition* screen. Follow the same process as above to search and select the evidence or held propertyyou want to add, then click the **Continue** button. The additional records are then added to the **Scheduled Disposition** list.

Note: RMS now supports searching for evidence associated to incidents that are past the statute of limitations. The statute of limitations is configurable by users with appropriate permissions in RMS Administration>Tables>State Offense Codes (or in NIBRS). Where a piece of evidence is associated to multiple incidents/offenses, the "younger" of the incidents/offenses determines the search result returned.



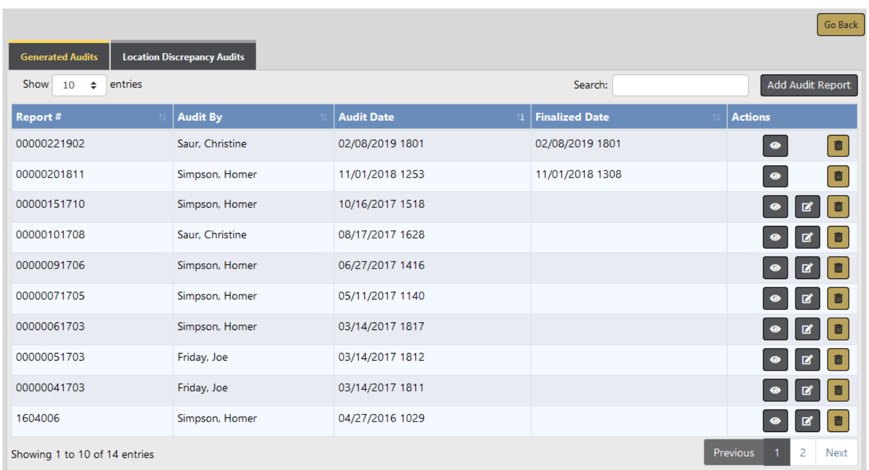
Click **Save** to save your changes and remain on the page where you can optionally **Print Chain of Custody**, **Print Labels**, and **Print Receipt**. For details, refer to "Print Labels, Chain of Custody, Receipts" on page 529.

Click **Save & Exit** to save your changes and exit the page.

Audit Reports

Audit Reports allows Evidence Custodians to perform self-audits of their agency's evidence or held property vault. Perform audits at any time.

Click on **Audit Reports** from the **Property Management** home window to display the available reports.



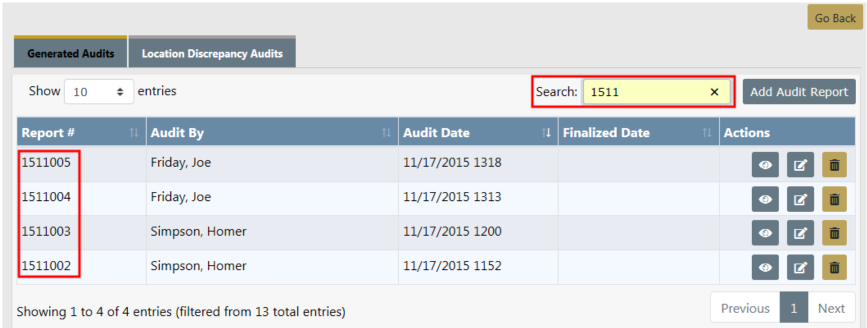
There are two tabs to the Audit Reports screen:

- Generated Audits
- Location Discrepancy Audits

Search Audit Reports

On either tab you have the ability to search for specific reports.

Click in the **Search** field and enter all or a portion of the **data** into the search text box that pertains to the search criteria. The results that match your criteria and entered data display in the grid.

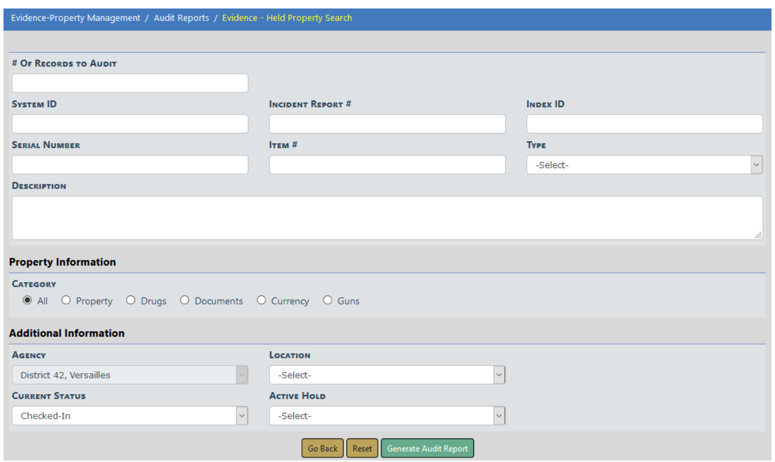


Report #	Audit By	Audit Date	Finalized Date	Actions
1511005	Friday, Joe	11/17/2015 1318		
1511004	Friday, Joe	11/17/2015 1313		
1511003	Simpson, Homer	11/17/2015 1200		
1511002	Simpson, Homer	11/17/2015 1152		

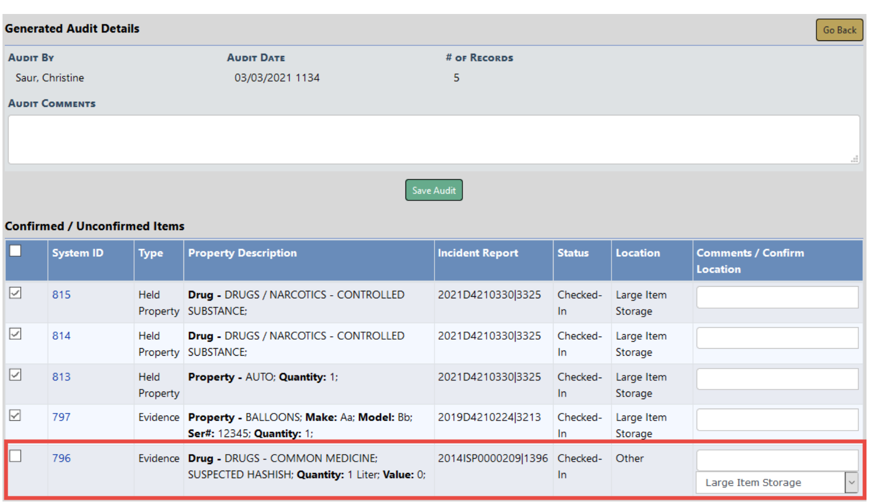
Create a New Audit Report

You have the ability to generate a new **Audit Report**.

Click the **Add Audit Report** link on the *Generated Audits* tab to open the *Evidence - Held Property Search* form.



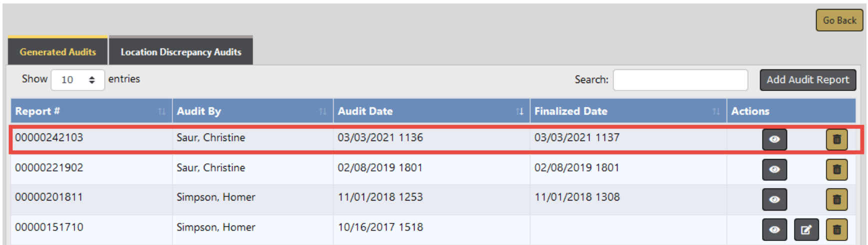
Enter the **# of Records to Audit** and other applicable fields then click **Generate Audit Report** to display the **Audit Report**.



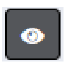
	System ID	Type	Property Description	Incident Report	Status	Location	Comments / Confirm Location
☑	815	Held Property	**Drug -** DRUGS / NARCOTICS - CONTROLLED SUBSTANCE;	2021D4210330|3325	Checked-In	Large Item Storage	
☑	814	Held Property	**Drug -** DRUGS / NARCOTICS - CONTROLLED SUBSTANCE;	2021D4210330|3325	Checked-In	Large Item Storage	
☑	813	Held Property	**Property -** AUTO; **Quantity:** 1;	2021D4210330|3325	Checked-In	Large Item Storage	
☑	797	Evidence	**Property -** BALLOONS; **Make:** Aa; **Model:** Bb; **Ser#:** 12345; **Quantity:** 1;	2019D4210224|3213	Checked-In	Large Item Storage	
☐	796	Evidence	**Drug -** DRUGS - COMMON MEDICINE; SUSPECTED HASHISH; **Quantity:** 1 Liter; **Value:** 0;	2014ISP0000209|1396	Checked-In	Other	Large Item Storage

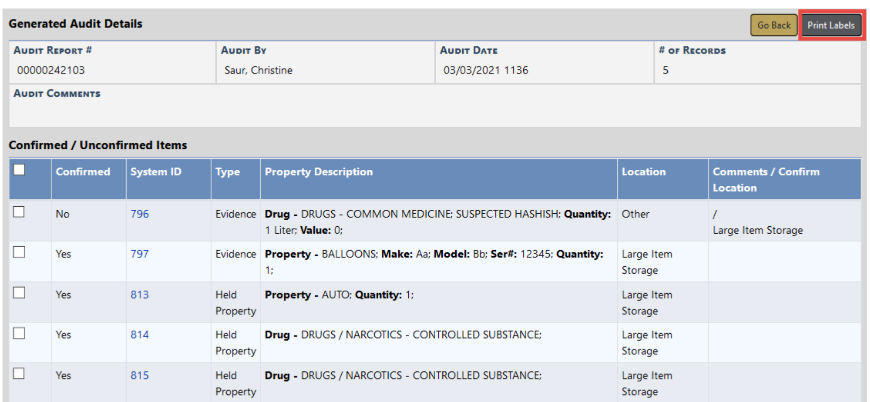
If the **Location** is different, uncheck the box to the left, and select the correct **Location** from the list box on the right. Enter any necessary comments.

Click **Save Audit** to save the report, then click **Finalize** to add it to the **Audit Report** list.



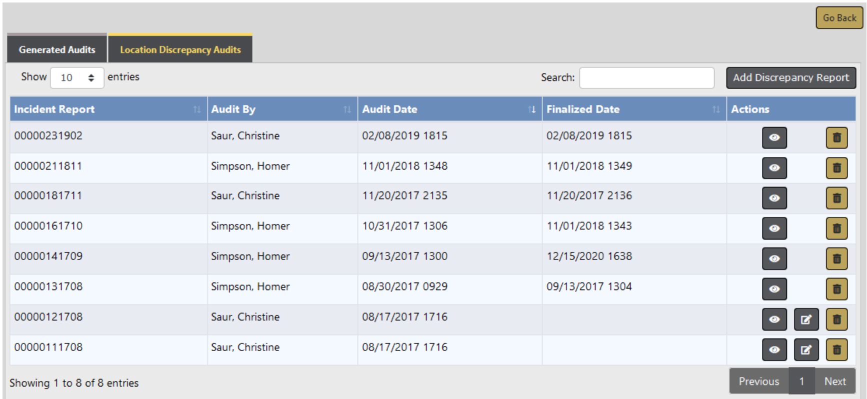
Using the icons in the *Action* column you can with appropriate permissions view, edit or delete reports. If an icon does not appear, then you do not have permissions to perform that action. For example, if the edit icon does not appear next to a particular report then you cannot edit that report.

Click the **View** icon  to view the **Audit Report** and print labels.



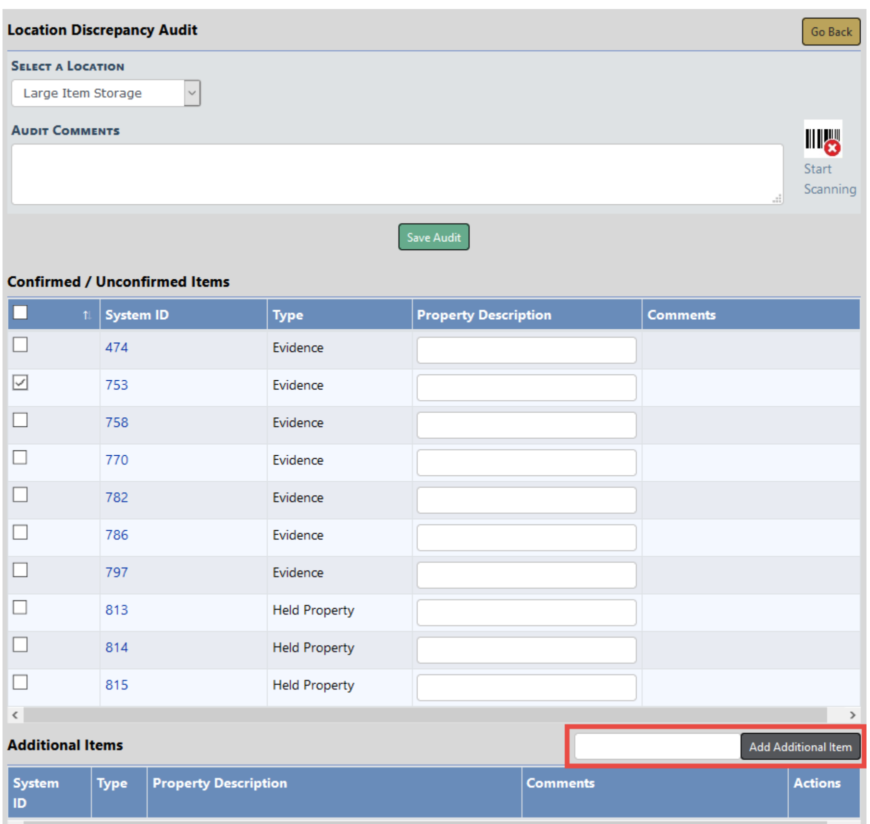
Create Location Discrepancy Audit Report

You have the ability to create a **Location Discrepancy Audit Report** from the *Location Discrepancy Audits* tab. This report lists all items currently in a particular location.



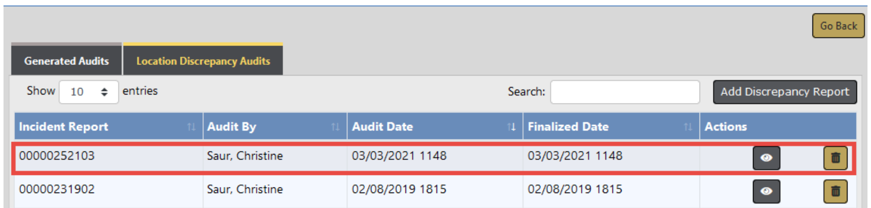
Click on the **Add Discrepancy Report** button to display the *Location Discrepancy Audit* form.

Select a location to display the **Location Discrepancy Audit** report.



Select all items to that are *Confirmed*. You can select individual items, or all items at once. If all items are *Confirmed*, click the **Select All** box on the top left to check all items listed. To add an item to the list, enter the **System ID** in the **Additional Items** text field and click **Add Additional Item**. If the **System ID** entered does not exist, you will receive a message stating it could not be found.

Click the **Save Audit** button, then click **Finalize** to save the report to the **Location Discrepancy Audit Reports** tab.

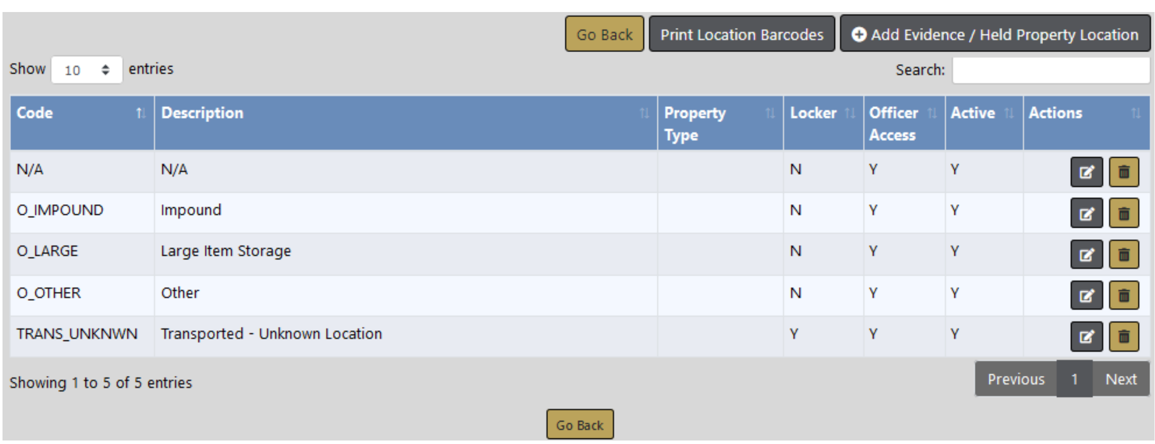


Using the icons in the *Action* column you can view, edit or delete reports. If an icon does not appear, then you do not have permissions to perform that action. For example, if the edit icon does not appear next to a particular report then you cannot edit that report.

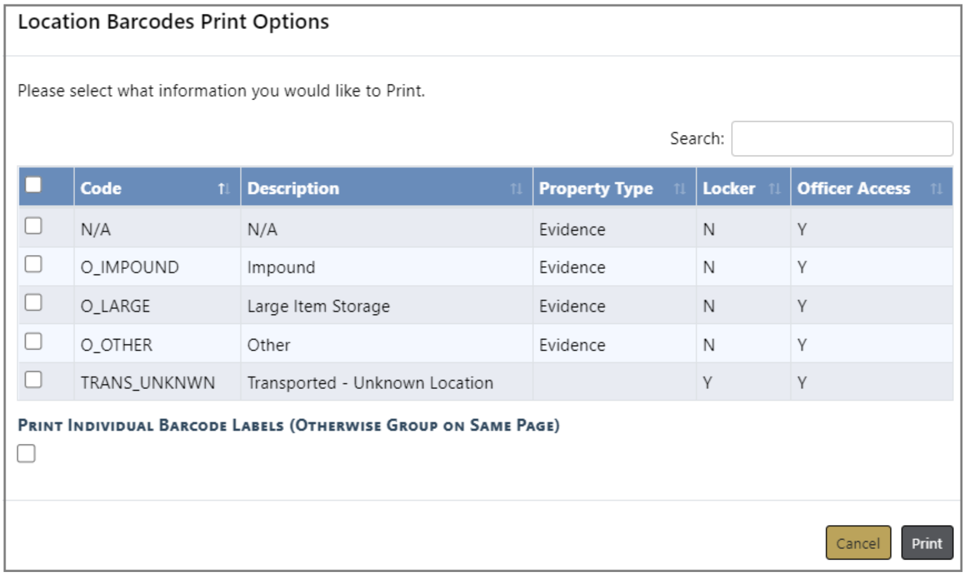
Property Locations

The Evidence Custodian with the *Evidence Locations - Manage Evidence Locations* permissions can use this link to produce a location barcode report and manage evidence/held property locations.

Click on the **Property Locations** link on the **Evidence/Property Management** page to open the *Evidence - Held Property Locations*.

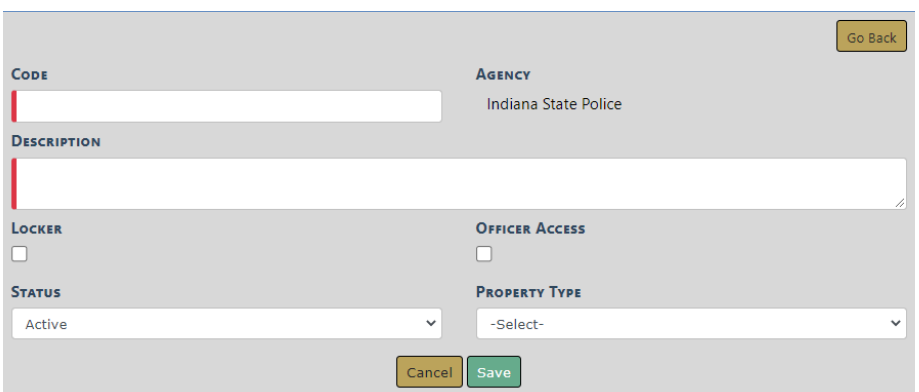


Click the **Print Location Barcodes** button to print location barcode labels.



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

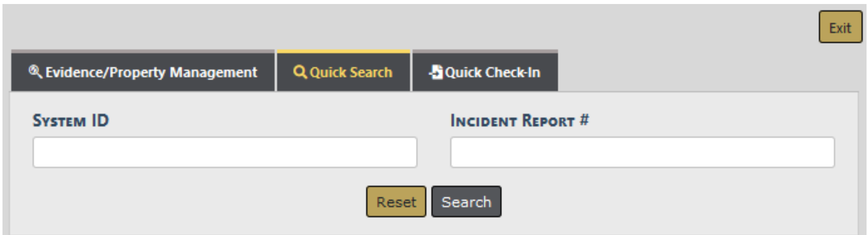
Click the **Add Evidence/Held Property Locations** button to open the *Add Evidence - Held Property Location* window to add another location record.



- Complete the fields.
- Click **Save**.

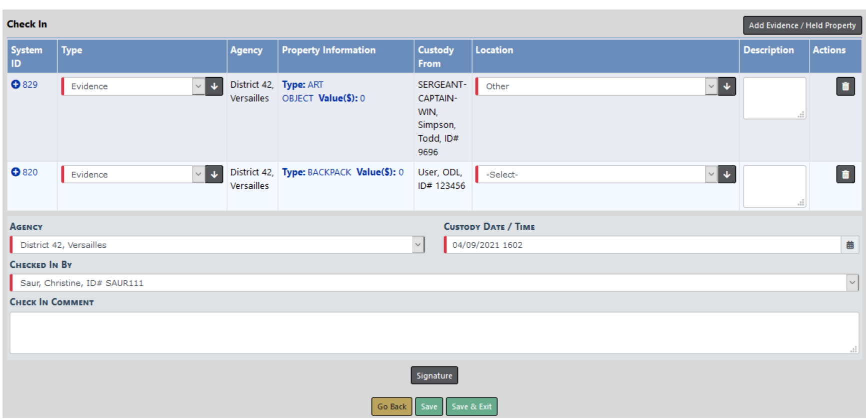
Quick Search Tab

This option works the same way as the **Evidence - Held Property Search**. The process, however, is shortened by using a scanner and barcode system.



Quick Check-In Tab

This option works the same way the **Check-In** link works. The process, however, is shortened by using a scanner and barcode system.



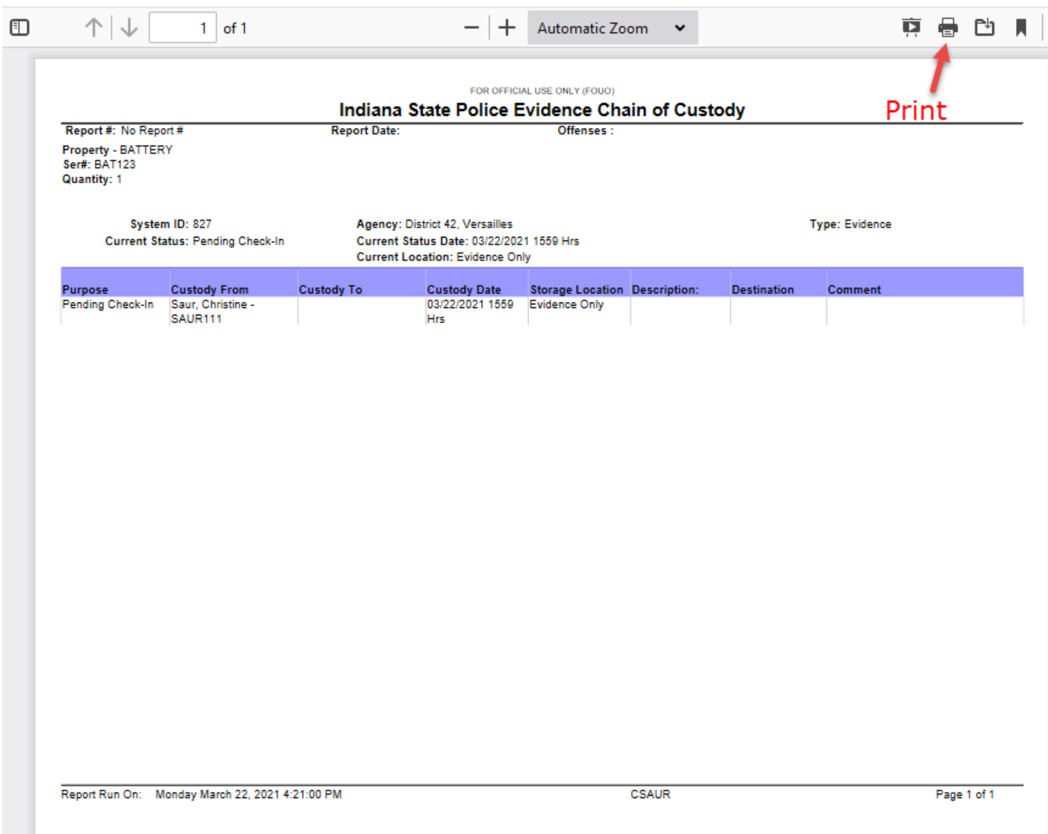
Print Labels, Chain of Custody, Receipts

The **Evidence/Property Management Module** provides the ability to print the chain of custody, label, or receipt by clicking on the respective button when available:

For more information on the Evidence/Property Management Module, refer to "Evidence/Property Mgmt Module Overview" on page 497.

Print Chain of Custody

Click on the Chain of Custody button to open the chain of custody in a new tab in the browser.



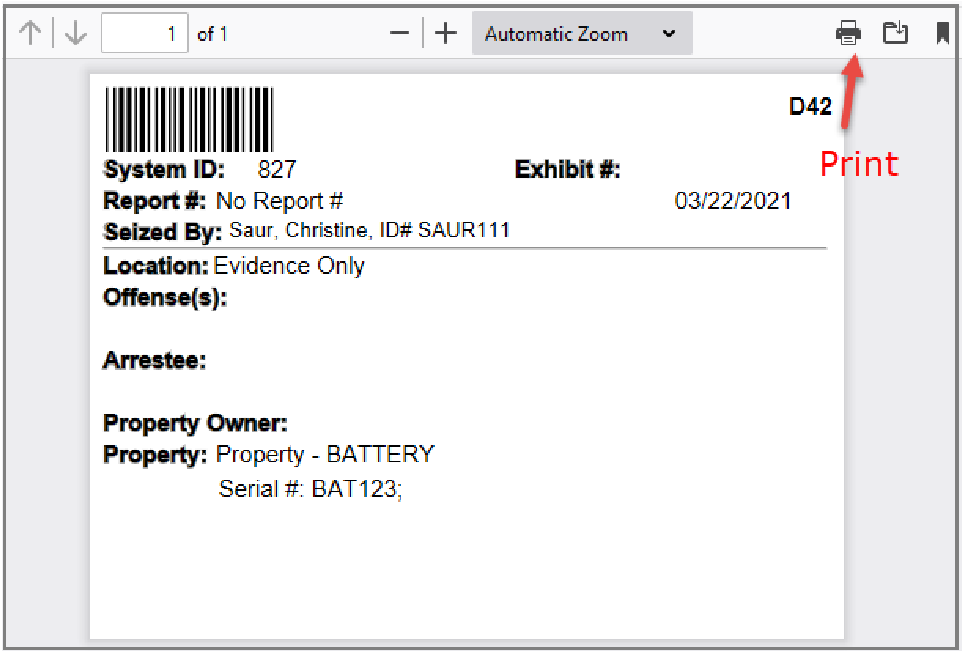
Your agency administrator has the option to apply a maintenance value setting to control whether or not chain of custody prints in ascending order by default. Refer to your agency administrator for details.

Click the print icon to print to the printer or save to a file.

Note: RMS now supports the printing of signatures on the chain of custody (where enabled and used).

Print Label

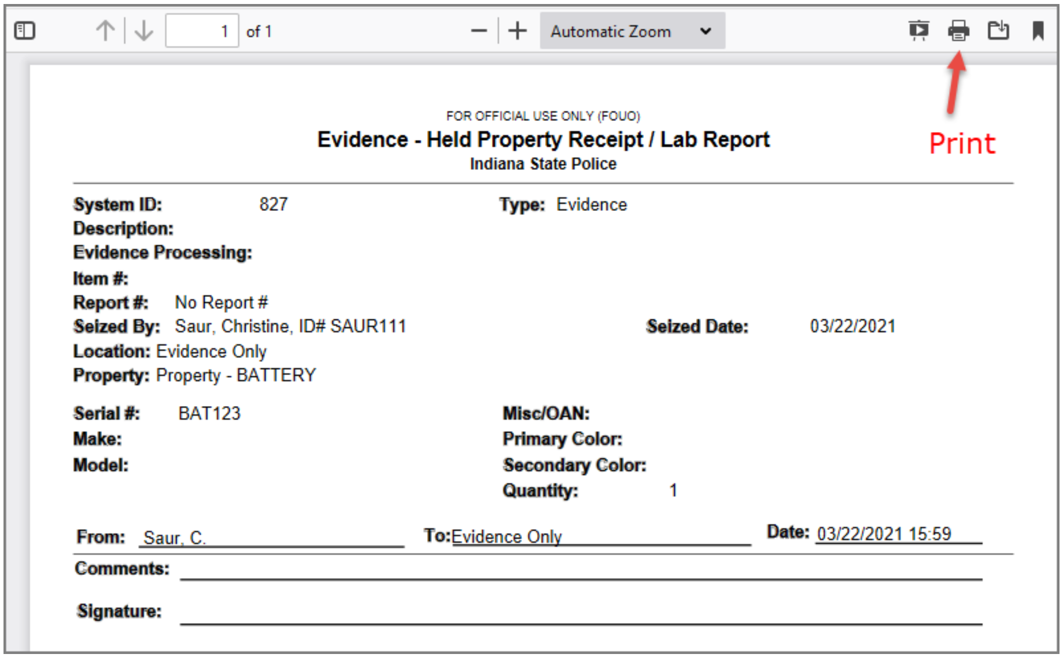
Click on the **Print Label** button to open the label in a new tab in the browser.



Click the print icon to print to the printer or save to a file.

Print Receipt

Click on the **Print Receipt** button to open the receipt in a new tab in the browser.


1 of 1
Automatic Zoom
Print

FOR OFFICIAL USE ONLY (FOUO)
Evidence - Held Property Receipt / Lab Report
Indiana State Police

System ID: 827 **Type:** Evidence
Description:
Evidence Processing:
Item #:
Report #: No Report #
Seized By: Saur, Christine, ID# SAUR111 **Seized Date:** 03/22/2021
Location: Evidence Only
Property: Property - BATTERY

Serial #: BAT123 **Misc/OAN:**
Make: **Primary Color:**
Model: **Secondary Color:**
Quantity: 1

From: Saur, C. **To:** Evidence Only **Date:** 03/22/2021 15:59
Comments:
Signature:

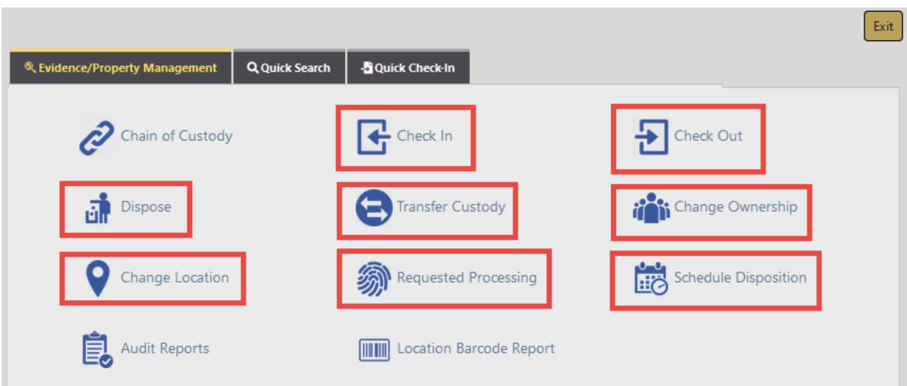
Click the print icon to print to the printer or save to a file.

Chapter 25. Barcode Search Process

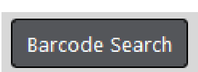
Barcode Search Process Overview

The **Barcode Search** feature allows you to input multiple items into the **Evidence/Property Management Module** automatically by scanning the barcode label through the Property Management menu.

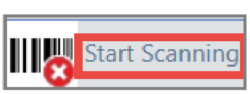
Access the scanning process through applicable links on the *Property Management* menu. For instructions on accessing the *Evidence/Property Management* menu, refer to "Evidence/Property Mgmt Access" on page 499.



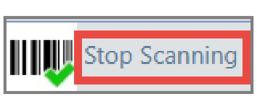
Click on one of the links to open the respective *Search* screen, then click on the **Barcode Search** button on the top right.



Click the **Start Scanning** link to start the process of scanning each label. As each label is scanned there will be a beep from the system and a listing of the item will appear on the screen in the grid. You can delete a particular item if needed.



When you are finished scanning, click the **Stop Scanning** icon and select the **Continue** button.



The system then continues to function as described in the "Evidence/Property Mgmt Access" on page 499 section.

Click **Save** to save your changes and remain on the page.

Click **Save & Exit** to save your changes and exit the page.

Location Barcode Report

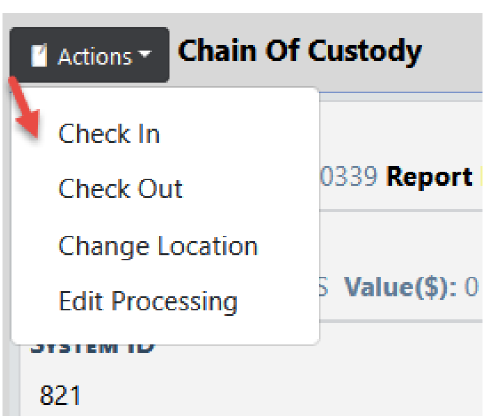
This link allows the Evidence Custodian to print a report showing the evidence and held property locations in the evidence room, along with a corresponding **Barcode**. This allows agencies to scan the location with a barcode scanner rather than select it from the **List of Values** (LOV).

Mega Menu

When viewing the Chain of Custody for any piece of evidence or held property, there is a **Mega Menu** to the top left. Evidence Custodians can use this menu to take action and change the **Status** of the item without leaving the window. The *Actions* available will be shown based on the **Current Status** of the evidence or held property.

Click on the **Mega Menu** button to display a drop-down of items from which to choose.

Choices available under the **Mega Menu** vary depending on the evidence **Current Status**.

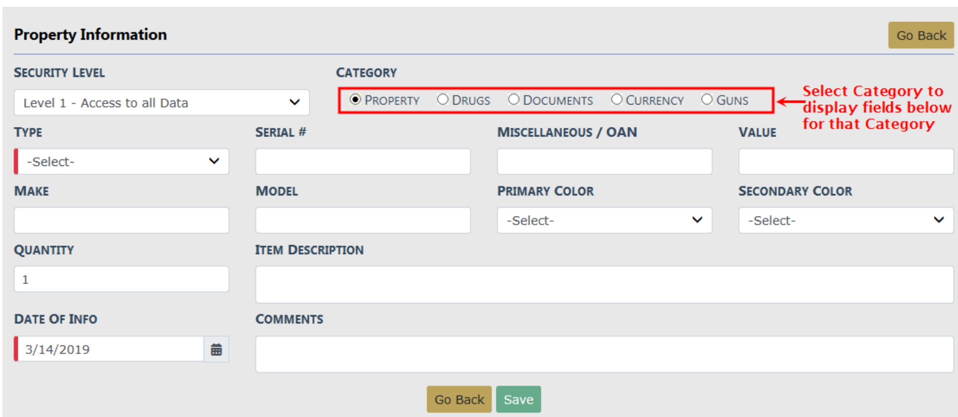


Create Evidence or Held Property without An Incident Report

Officers can create property and indicate that the property is also evidence or held property without creating an incident report with appropriate permissions. This functionality is not a part of the default setup but can be requested by an agency administrator if desired.

To create evidence or held property without an incident report, the officer navigates to **Master Indices**, selects the *Property Tab*, then clicks the **Add Property** hyperlink. For information on accessing **Master Indices**, refer to "Master Indices" on page 83.

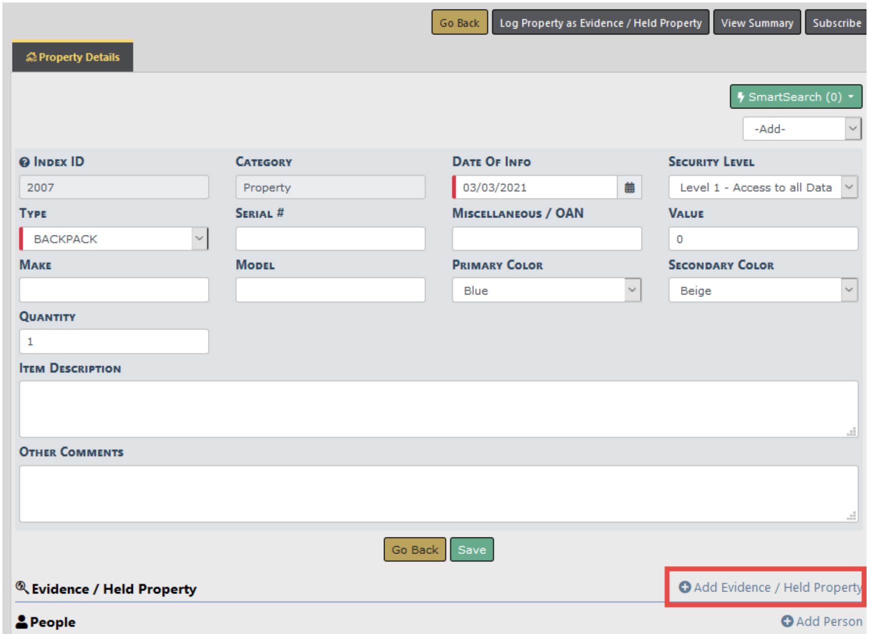
Click the **Category** to display additional fields specific to that Category to describe the property in more detail.



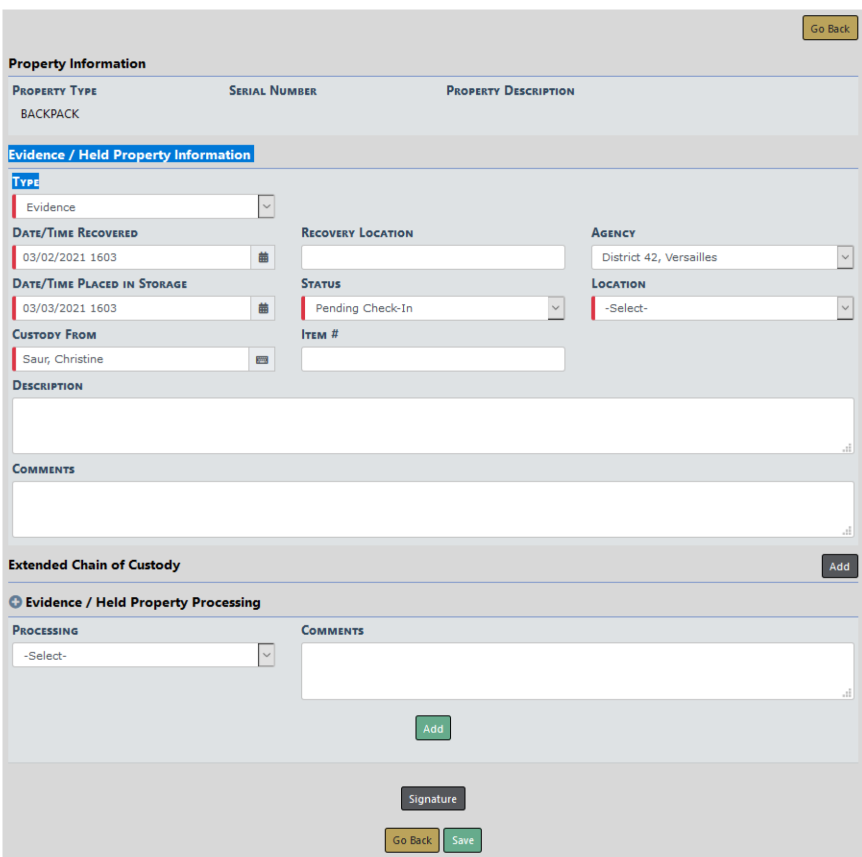
When all required information and as much other information as possible has been entered, click the **Save** button to add the property to the report.

The **Edit Property** screen appears. Click the **Add Evidence/Held Property** hyperlink in the Evidence/Held Property grid to add the property.

Note: To see this link, you must have the *Master Indices - Add Evidence to Master Index Property* permission. Refer to your agency administrator for details.



The standard **Evidence - Held Property** screen appears.



Select the **Type** (Evidence or Held Property), **Location** and enter other necessary information.

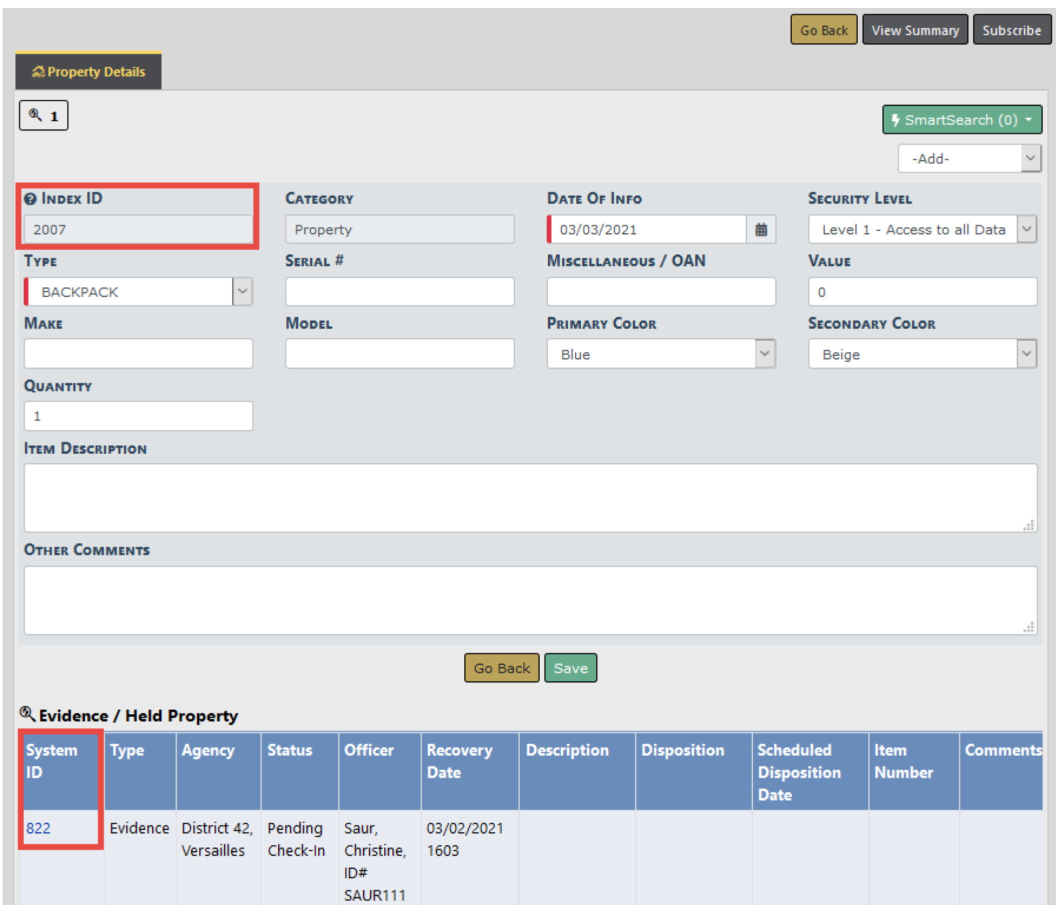
Optionally, click **Signature** to add a signature.

Optionally, click **Add** to add an *Extended Chain of Custody* and supply information in the fields that appear.

Optionally, select a **Processing** option from the drop-down list and enter comments.

> **Note:** With Online RMS version 11.6 and above, your agency administrator has the option to set the *Evidence_Processing_Required* maintenance value to **Y** to require at least one processing record when adding evidence/held property records.

The **Edit Property** screen opens. The Property record now has an **Index ID** and **System ID** for tracking.

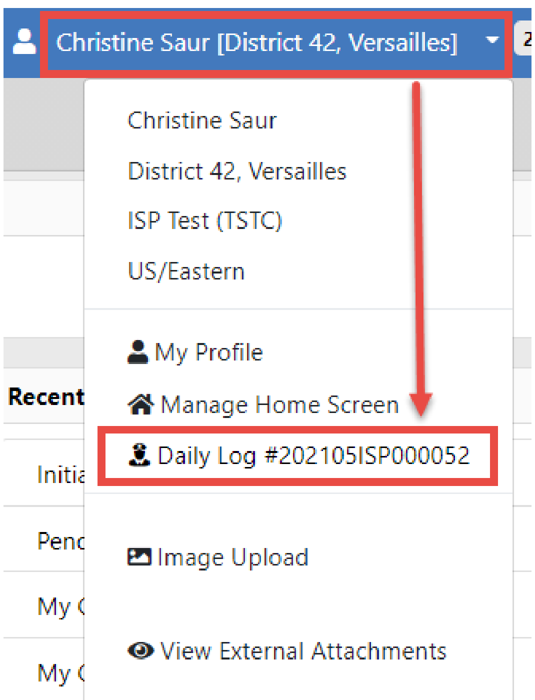


Chapter 26. Officer Daily Log

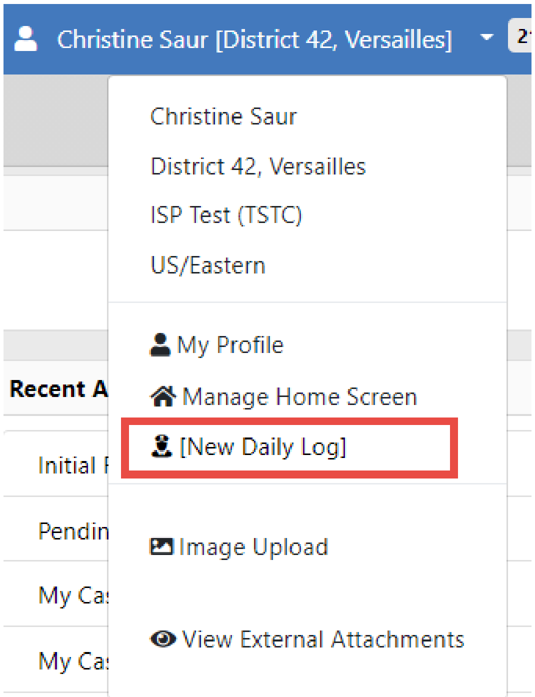
Officer Daily Log (ODL) Overview

The **Daily Log** summarizes the officer's activities during their shift, such as assignments, issued equipment, report assignments and filings, and other activities. The officer can enter data as needed, and specific actions, such as creating incident reports, are automatically captured in the log by the system.

As an officer, you can access your existing current log from the *Home Page* by clicking on your user name in the upper right corner, then click **Daily Log** (notice the current log number also displays).



If a Daily Log has not yet been created, a **[New Daily Log]** option appears on the menu instead of the exiting Daily Log that contains a number. Click on **[New Daily Log]** to create.

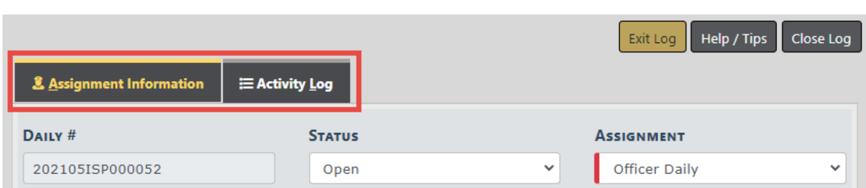


Note: For instructions on creating a new Daily Log, refer to "Create New Log" on the facing page.

Note: Once closed, the **Officer Daily Logs** are maintained in *Records Management*. Before a supervisor posts an officer's log, it can be viewed, edited or deleted by the owner of the log. After Supervisors post the logs, the log can be viewed as needed under *Records Management*. A supervisor can un-post a log using the **Un-Post** feature to allow log corrections or modifications.

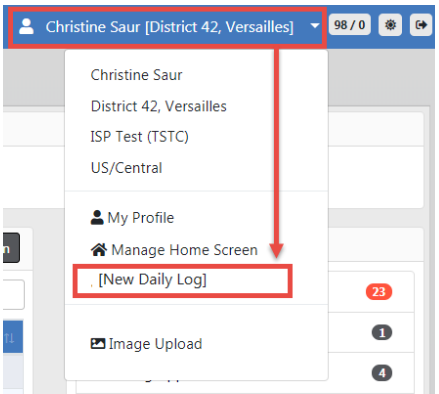
There are two tabs in the **Officer Daily Log**:

- Assignment Information
- Activity Log

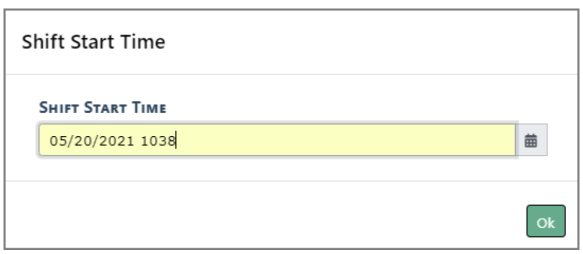


Create New Log

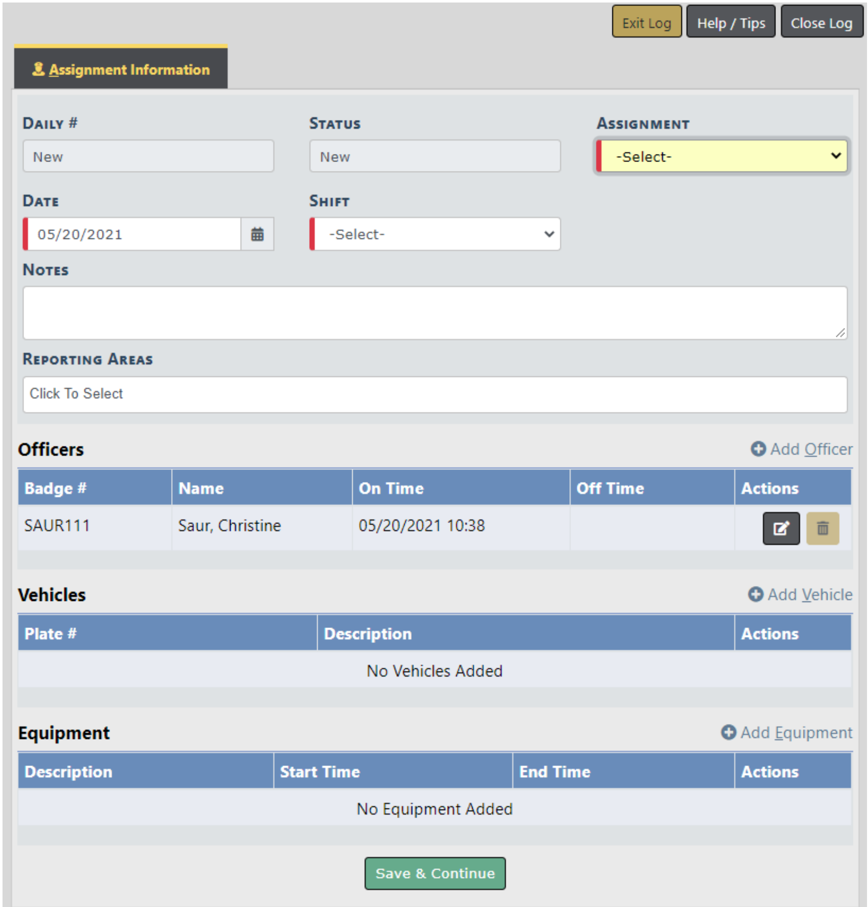
You can create a new Daily Log from the *Home* page by clicking on your user name in the upper right corner, then click **New Daily Log**.



A *Shift Start Time* window opens, defaulting to the current date and time. Change the date and time if needed, then click **OK**.



An *Assignment Information* form appears. Enter the appropriate information in the fields provided.

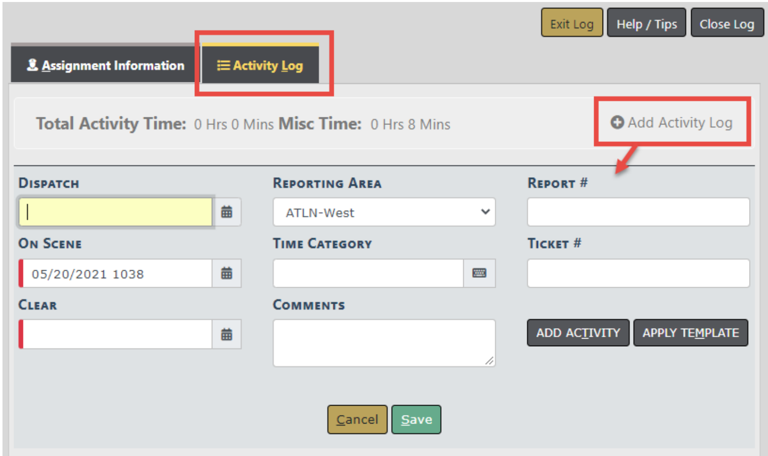


- The **Daily#** generates a number for you systematically after saving the form.
- The **Status** defaults to *New*.
- Select **Assignment** and **Shift** from the drop-down lists.
- Enter any **Notes** and select the **Reporting Area**.
- Complete the Officers, Vehicles, Equipment sections as needed.

Note: For more information on *Assignment Information*, refer to AssignmentTab.htm.

Click **Save & Continue**.

An *Activity Log* tab opens. Click **Add Activity Log** to create an entry.



Enter data into the fields provided then click **Save**.

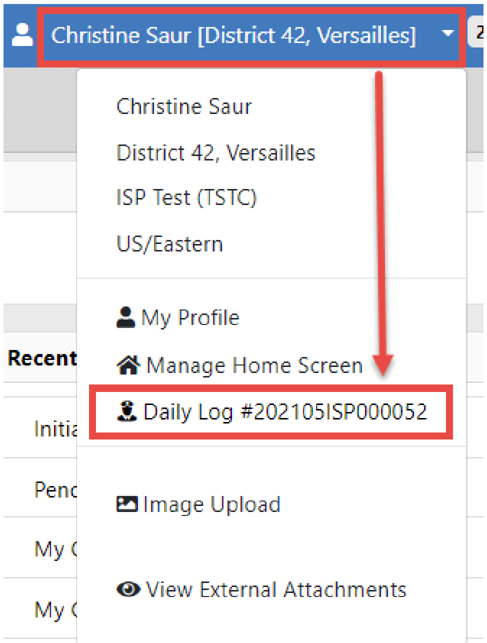
Note: For more information on the *Activity Log*, refer to "Activity Log Tab" on page 549.

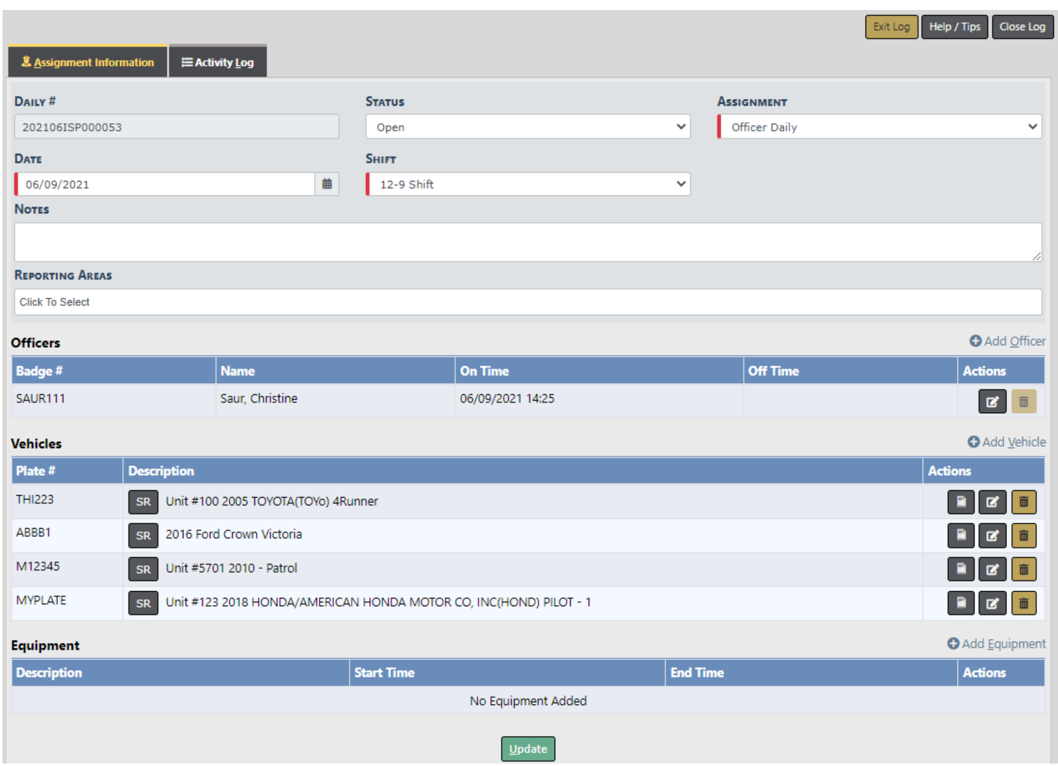
To exit the log and come back to it later, click **Exit Log**, or to close and submit the log for supervisor review, click **Close Log**.

Note: For more information on exiting and closing the log, refer to "Close or Exit the Daily Log" on page 556.

Access Existing Log

To access your own current log throughout the day, click on your user name on the *Home* page, then click **Daily Log**.



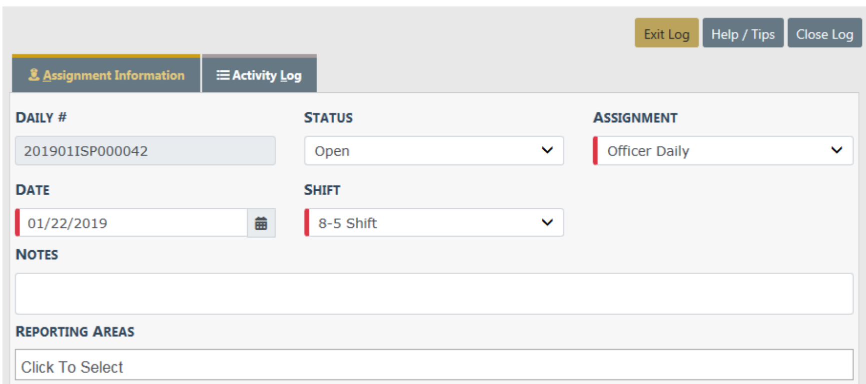


With appropriate permissions, you can add an existing custom Form to the fleet vehicle, edit the fleet vehicle, add a vehicle service request SR.

Note: For more information on accessing your current log, refer to "Officer Daily Log (ODL) Overview" on page 539.

Assignment Tab

The Officer Daily Log defaults to the **Assignment Information** tab. Complete the top portion of the *Assignment Information*.



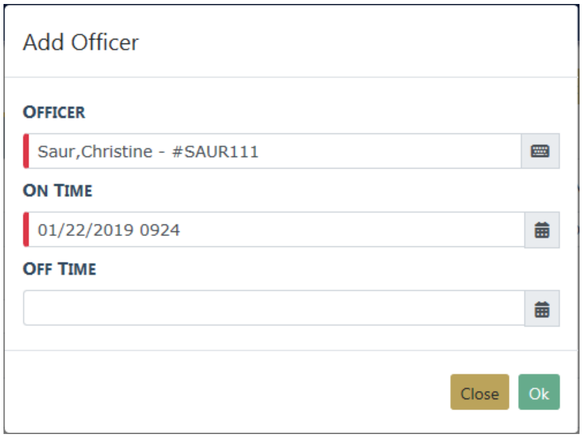
Complete the Officers, Vehicles, and Equipment sections as needed.

For more information on Officers, refer to "Officers" below.

For more information on Vehicles and Equipment, refer to "Vehicle & Equipment" on the next page.

Officers

There may be times an additional officer needs to be added to the **ODL**. To do this, select **Add Officer** under the *Officers* section.



Start typing the officer’s name/User ID in the Officer field to display a list of officers from which you can select.

If you need to select a different *On Time* you may use the Calendar tool to select a different date/time than the default.

Click **OK** and the Officer’s information is added to the Officers grid.

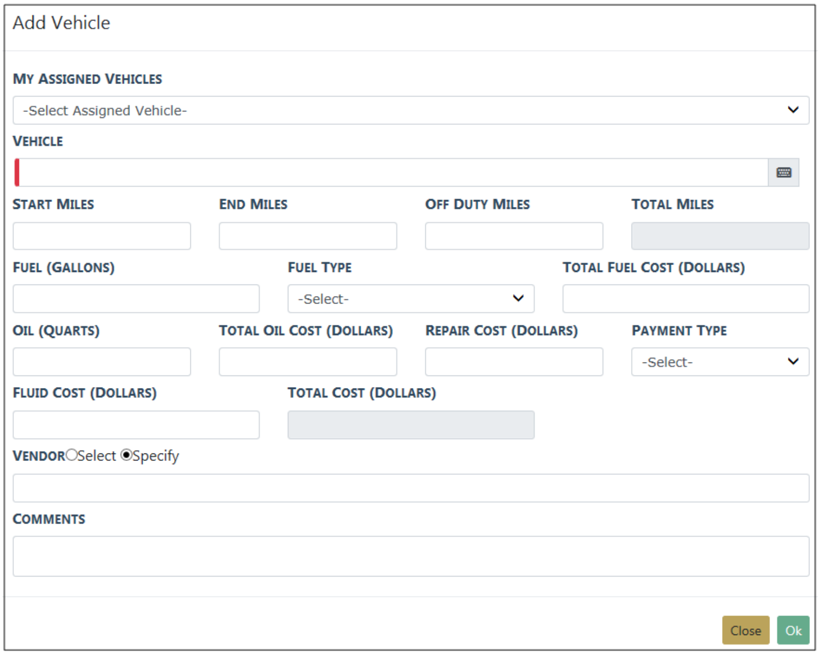
Use the **Edit** or **Delete** icons to the right in the appropriate row of the grid/table to make changes as needed to your log.

> **Note**: Agency specific values can be administered by an Agency Administrator under *Manage Agency*, and the **Officer Daily Log** tables under the *Agency Settings* tab.

> **Note**: Additional officers added to the **Daily Log** must be added manually to the *Assignment* within **Fleet Management**. Refer to "Edit Vehicles " on page 711 for more information.

Vehicle & Equipment

If the vehicle to which you are assigned does not auto-generate into the **ODL**, you will need to **Add** the vehicle.

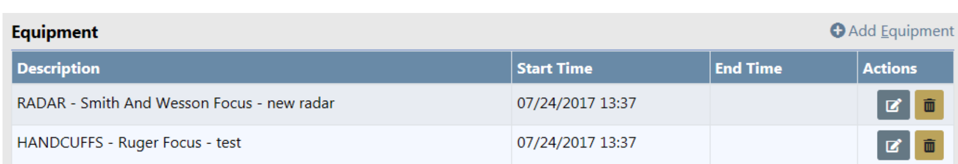


Click the **My Assigned Vehicles** field and choose a vehicle from the drop-down list. The **Vehicle** field will populate automatically. Or, you can add your own **Vehicle** by begin typing the **Unit #** or **Plate #** into the Vehicle field, then select the correct vehicle from the list that appears. It will auto-generate the **Start Miles** for you based on the previous users/your end miles. Select **OK**.

Select the **SR** button to create a new **Service Request** for the assigned vehicle. Refer to "Service Request" on the next page for more information.

Click the  icon , if available, to quickly add a custom form to the fleet vehicle.

You may also **Add**, **Edit** or **Delete** equipment assigned to you.



Note: If any Vehicles or Equipment have been taken out-of-service by an Agency Administrator prior to you closing your **ODL**, you will not be able to close your **ODL** unless the Vehicle and/or Equipment is put back in service. This is why it is important to make sure you close your **ODL** after your shift is complete.

Select the **Update** button on the bottom of the page to save your work.

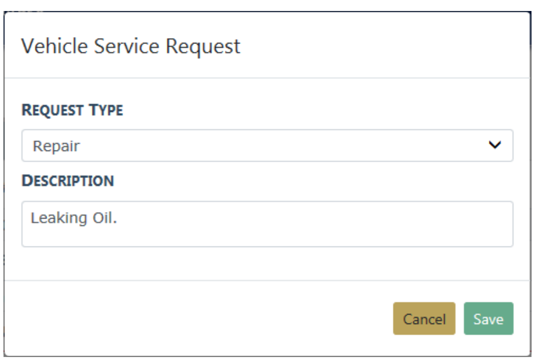
With permissions you can select the custom form button to add a custom form to the vehicle.

For more information, refer to "Add Custom Forms to Fleet Vehicle and Assignments" on page 703.

Service Request

Select the **SR** button to create a new **Service Request** for the assigned vehicle, if applicable.

Select the **Request Type** from the drop down list, enter a description of what is needed, then click **Save**.



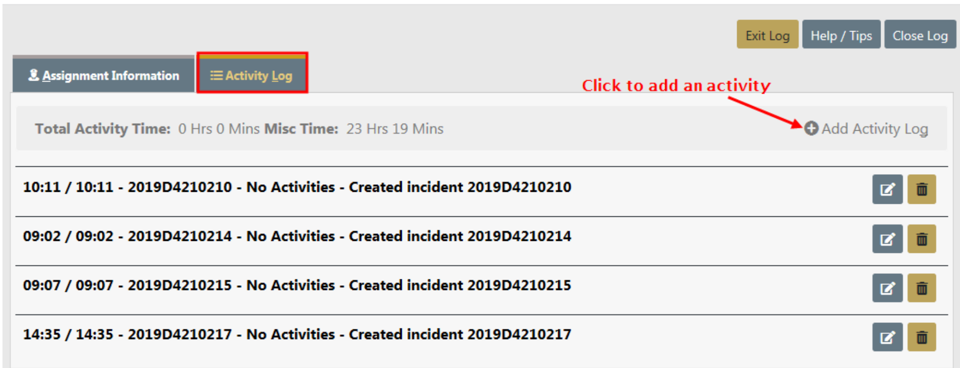
Note: The **Requesting Officer** defaults to the officer and the Status defaults to Pending.

A successful confirmation message briefly appears across the top of the window.

Note: Officers must edit **Services Requests** via the *Fleet Management* module. Refer to "Edit a Service Request " on page 723 for more information.

Activity Log Tab

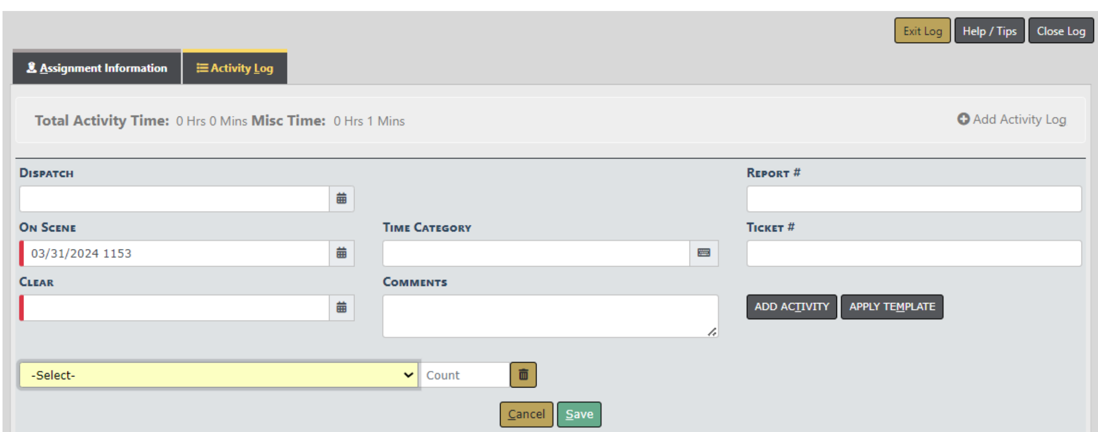
Click on the **Activity Log** tab to manage activity. You can add, edit, or delete records.



Add Activity Log

Click the **Add Activity Log** link to add a new record.

Note: Starting with RMS 11.15, Activity Code entries are available from a selection box using the display arrow in the selection box. They no longer auto-complete when entering text.



Dispatch: Use the calendar tool to enter the dispatch date, and then type in the time you were dispatched to the scene. This may be auto-generated from CAD from the Dispatch Center.

On Scene: Current date is entered by the system, but you must enter the time you arrived on scene.

Clear: You must enter a date and time in these fields to save and/or continue.

Time Category: Start typing in this auto-complete field and the system displays a list of similar entries. Select the appropriate entry.

Comments: Type text in the text field. You can enter whatever information you want to include here, OR click **Apply Template** to copy standard text that has already been entered for you in a template.

> **Note**: Administrators set up and maintain activity codes and templates in the *Tables* module. Administrators can refer to the *Tables* chapter in the RMS Administrator Guide for more information.

Report #: If applicable, enter a **Report Number**. If you completed an incident report as a part of this activity, you would enter the incident report number here.

Ticket #: If applicable, enter a **Ticket Number**. During the course of a traffic stop, you might issue a ticket or Citation. If so, you would record the ticket/Citation number here.

Add Activity: Select the Show All arrow to display a list of activity codes.

Apply Template: Apply a pre-configured template for the activity.

When all applicable fields are complete, select **Save** to save the record.

Continue working as follows:

Select **Add Activity Log** to enter another activity in the log.

Edit Activity Log

Select **Edit** to the far right of a log entry to open it and make any changes.

Delete Activity Log

Select **Delete** to the far right of the log entry to completely remove the entry.

Switch to Edit Status

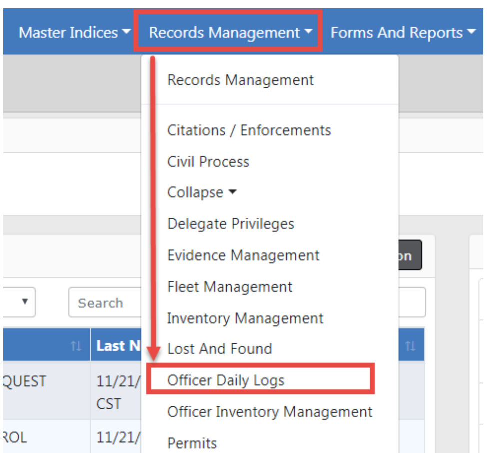
At this point you may choose to **Switch to Edit Status** if you have discovered something that would need editing.

Note: For more information on switching to edit status, refer to "Switch to Edit Status" on page 558.

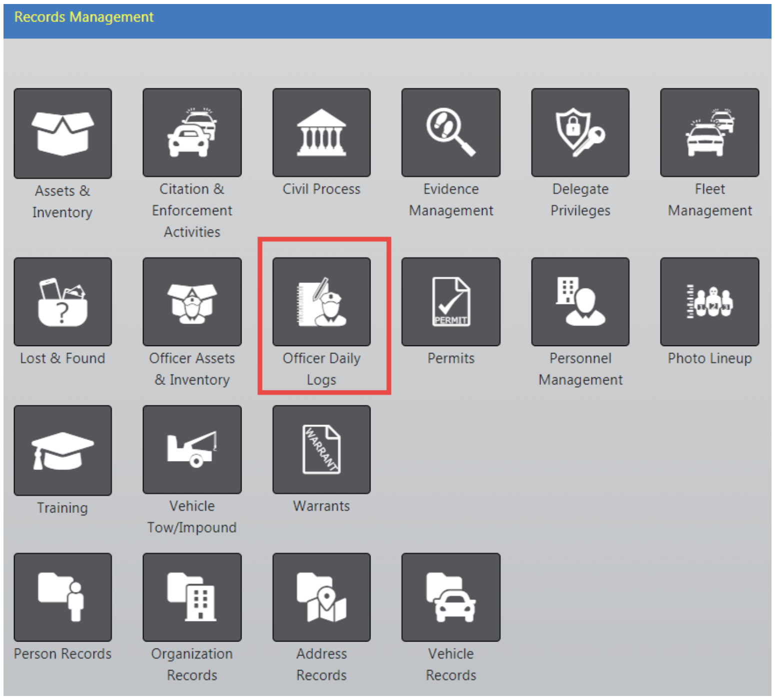
Log Search

Use the following procedures to search Officer Daily Logs:

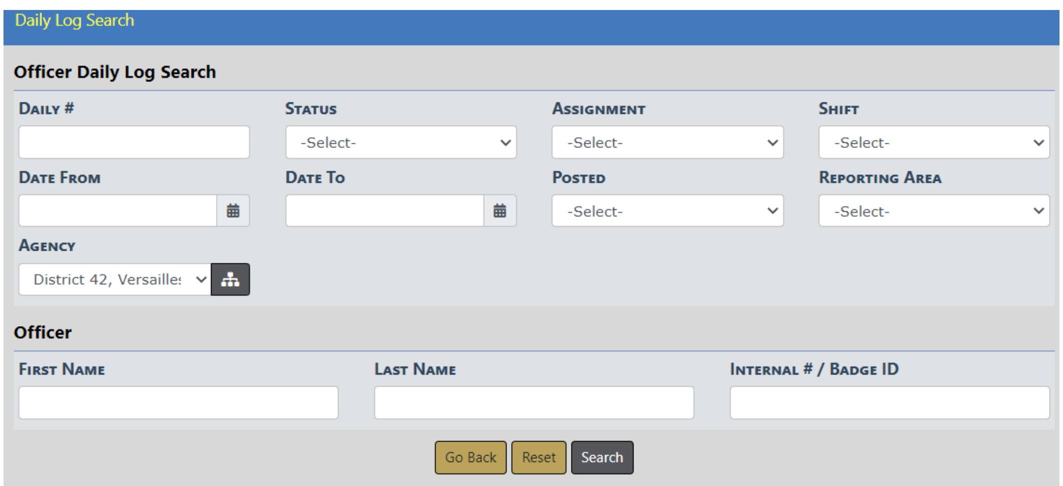
Select *Records Management* from the top menu, then select *Officer Daily Logs*.



Or, select *Records Management* to open the Records Management menu, then select *Officer Daily Logs*.



Whichever method you choose, the *Search Daily Logs* screen appears.



Enter the search criteria into the available fields or leave blank to return all records.

> **Note**: Do not leave the *Agency* field blank. You may search for ODL records in the agency or any agency within the organization. Pick from the agency LOV or click on the Agency Structure icon to display and select an agency.

Select **Search** to display the *Daily Logs Search Results* page with a list of search results.

Note: If needed, select **Refine Search** to narrow the search results by adding more parameters, or click **New Search** to start over with a new search.

The Posted column remains blank when there is an *Open* or *Closed* status.

The Status column displays the current status of the log, such as Open, Edit, Closed.

Select the View icon  to view a report.

Select the Edit icon  to edit a log.

Select the delete icon  to delete a log.

Post and Un-post Logs

Note: Only supervisors with the proper role assignment can post and un-post daily logs.

Use the search feature to display a list of logs from which to choose. Refer to "Log Search" on page 551 for instructions on searching.

Post Logs

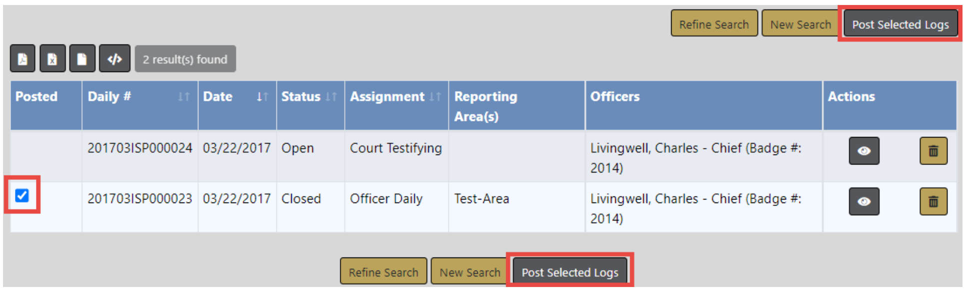
There are two ways to **Post** logs:

- Select and post one or more logs from the search results window.
- Post a log you are currently viewing.

Post Logs from Search Results

Search for a group of logs to post. For more information on searching logs, refer to "Log Search" on page 551.

In the Search Results window there is a box under the *Posted* column, next to the Logs that have not yet posted. Select each log you wish to post, then click the **Post Selected Logs** button. For your convenience, there is a button on the bottom and on the top right.



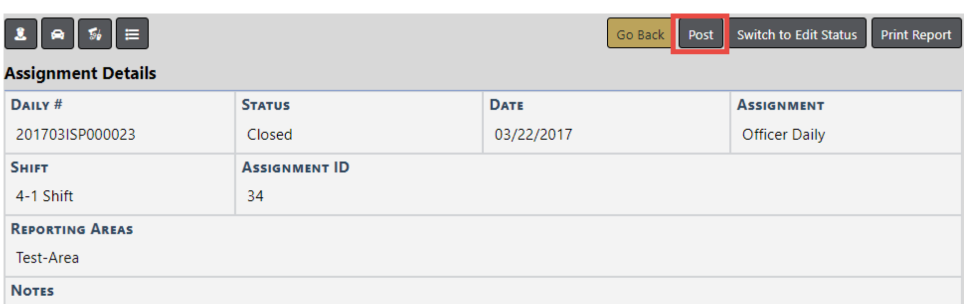
The selected logs are now **Posted**.

Post Log Currently Viewing

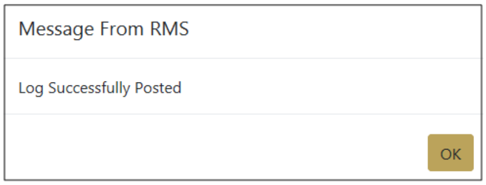
Search for the daily log you want to post. For more information on searching logs, refer to "Log Search" on page 551.

In the Daily Log Search Results window, click the View icon  in the *Actions* column of the log you want to post to display the *View Daily Log* page.

On the *View Officer Daily Log* window select the **Post** button.



A Successful dialog box displays. Select **OK**.



The log is now **Posted**.

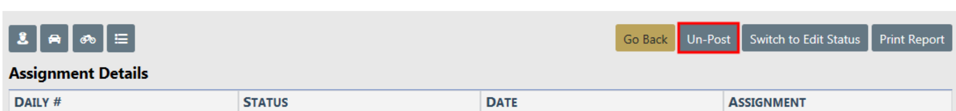
Un-Post Log

There may be times when a Daily Log needs to be un-posted. Perhaps one was posted by mistake, for example.

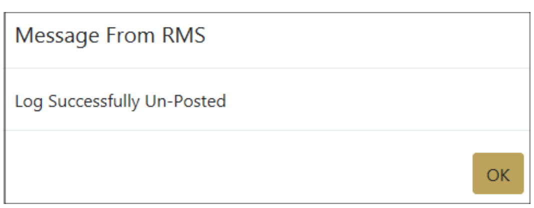
Use the *Officer Daily Logs Search* to find that specific log, defining your search parameters as specific as possible. Refer to "Log Search" on page 551 for instructions on searching.

In the Results window, click the view  icon in the *Actions* column of the log you want to un-post and it will display the *View Daily Log* page.

On the *View Daily Log* page, select **Un-Post**.



A Successful dialog box displays. Select **OK**.



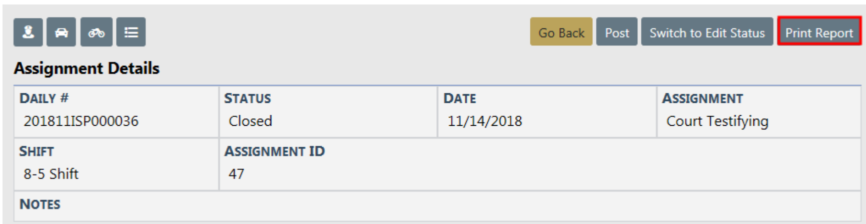
The log can now be edited by the officer who created it.

Print Report

Daily Log Reports can be printed, saved to a file on your computer, or both.

Use the search feature to view the log you wish to print. Refer to "Log Search" on page 551 for instructions.

After you have searched and selected the Log you wish to print, click on the **Print Report** button on the *View Log* screen.



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

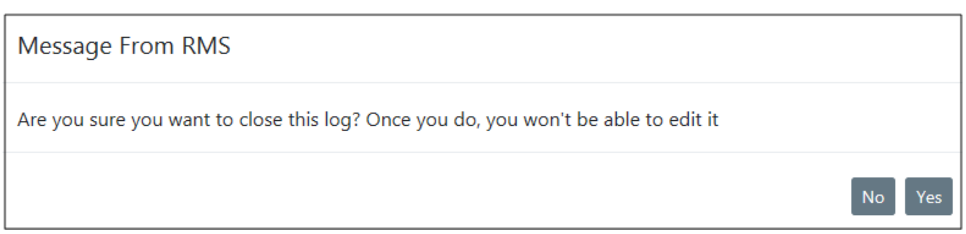
> **Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

Close or Exit the Daily Log

You have the option to exit or close the ODL. There is a difference between the two.

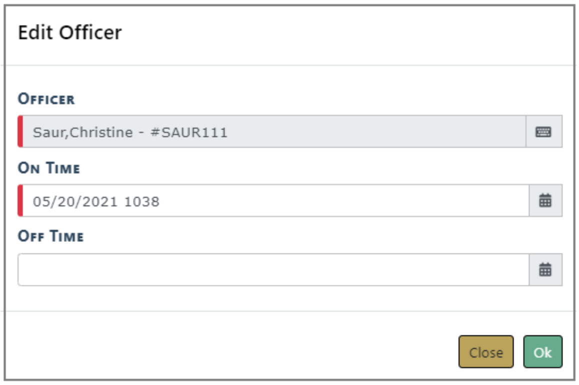
Close the Daily Log

The last button at the top of the **ODL** is the **Close Log** button. Use this button to close your log at the end of the day/shift and make it available to your supervisor for review and posting. Once you select this option, you will not be able to edit the log.



Click **Yes** to begin the close process, or click **No** to return to the *Activity Log* tab.

If you clicked **Yes**, an **Edit Officer** window appears.

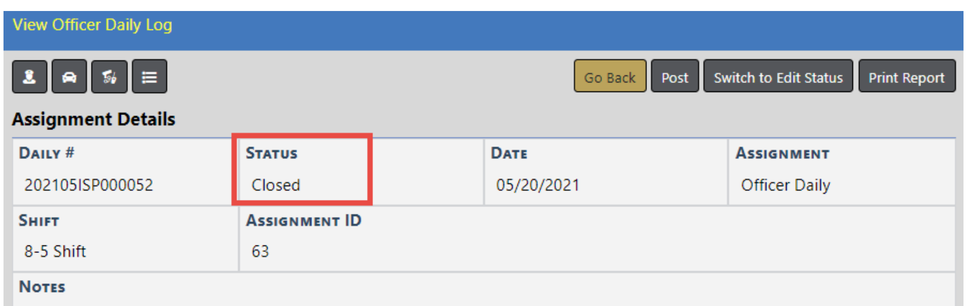


Select the **Off Time** for EACH officer that is on the **ODL**. Select **OK**.

If the log has vehicles or equipment, a separate window displays allowing you to select the **Ending Mileage** for the vehicle and any other appropriate fields. Once those fields are complete, select **OK**.

A separate window displays for the equipment, if any. Apply the necessary data, then select **OK**.

The *View Officer Daily Log* window displays, showing a status of **Closed**.



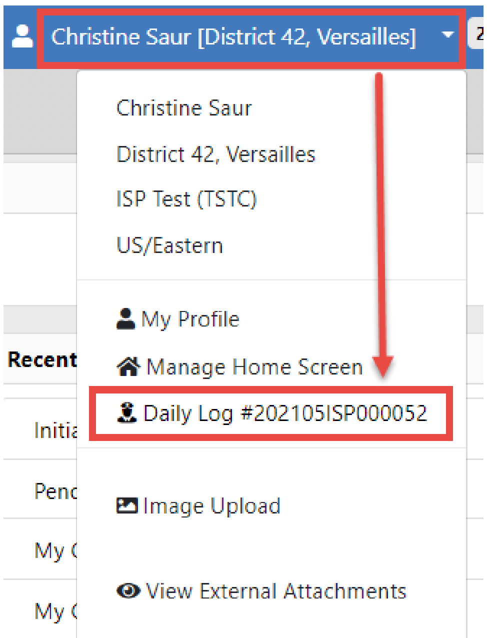
If you have discovered you need to make a correction to the Daily Log, click on the **Switch to Edit Status** button.

Note: For more information on switching to edit status, refer to "Switch to Edit Status" on the next page.

Exit the Daily Log

The first button on the top of the **ODL** is the **Exit Log** button. Use this button to exit your log but not close it.

You can return to your active log at any time by selecting the **ODL** that is active. For more information on accessing your current active log, refer to "Officer Daily Log (ODL) Overview" on page 539.



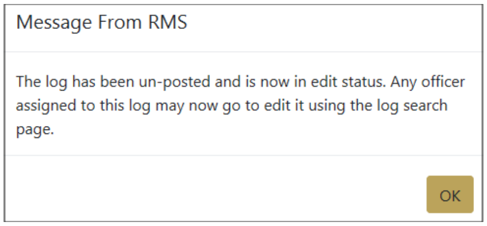
Switch to Edit Status

You can **Switch to Edit Status** if you have discovered a Daily Log needs editing.

If you have just closed the log, a **Switch to Edit Status** button appears near the top right of the form. If you closed the log earlier, then you need to search for and select the Daily Log to see the button.

For more information on searching for a Daily Log, refer to "Log Search" on page 551.

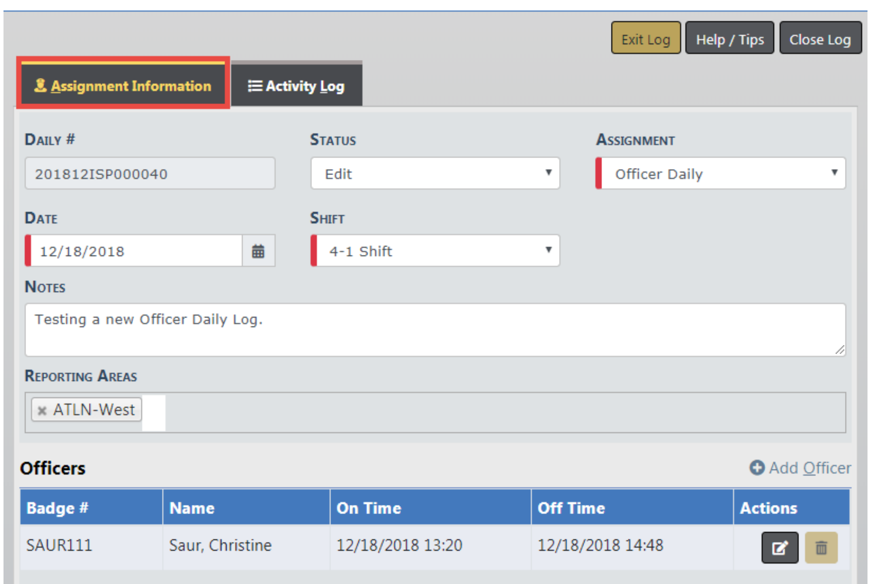
When you select the **Switch to Edit Status** button an un-posted confirmation message appears.



Select **OK**.

Select **Go Back** to display the *Officer Daily Log Search Results*. The Posted status has been removed and the Status now displays Edit.

Select the Edit icon  in the results window to open the log in edit mode.



Make the necessary updates, then select **Close Log** to close the log. You have to complete the same steps that you completed when you initially closed the log. The status is now **Closed**.

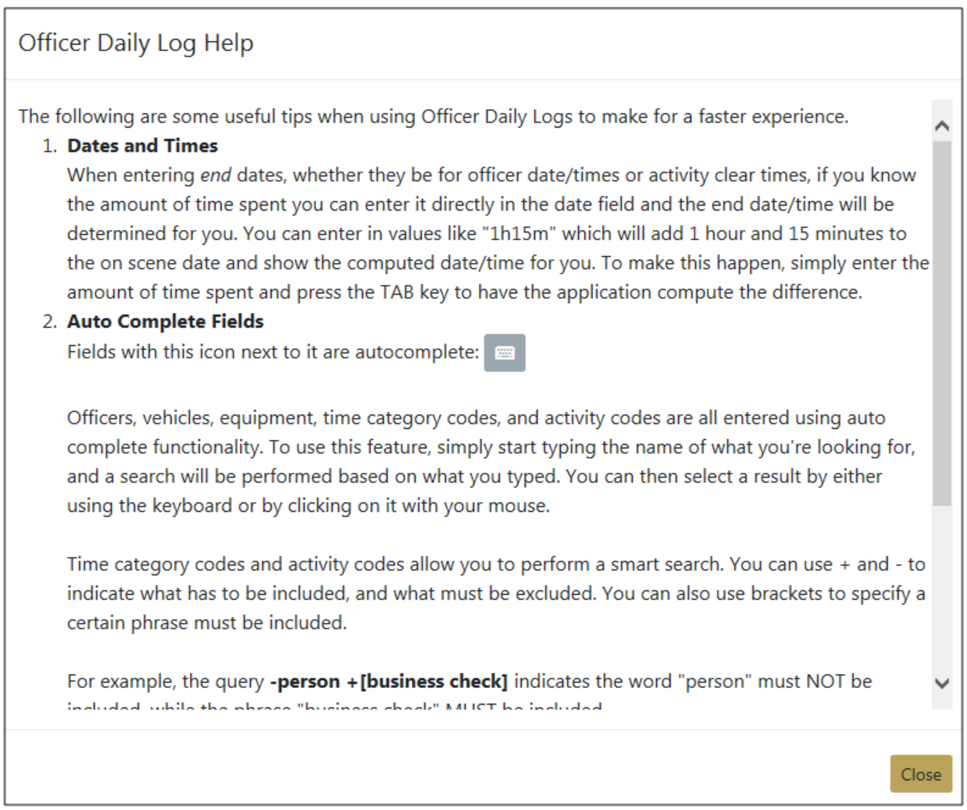
For more information on the *Assignment Information* tab, refer to "Assignment Tab" on page 545.

For more information on the *Activity Log* tab, refer to "Activity Log Tab" on page 549.

For more information on closing the daily log, refer to "Close or Exit the Daily Log" on page 556.

Help and Tips

For Help with the Officer Daily Logs, Select the **Help/Tips** button. This window will display information about entering dates and times, using auto-complete fields and keyboard short-cuts.



Click **Close** to close the window.

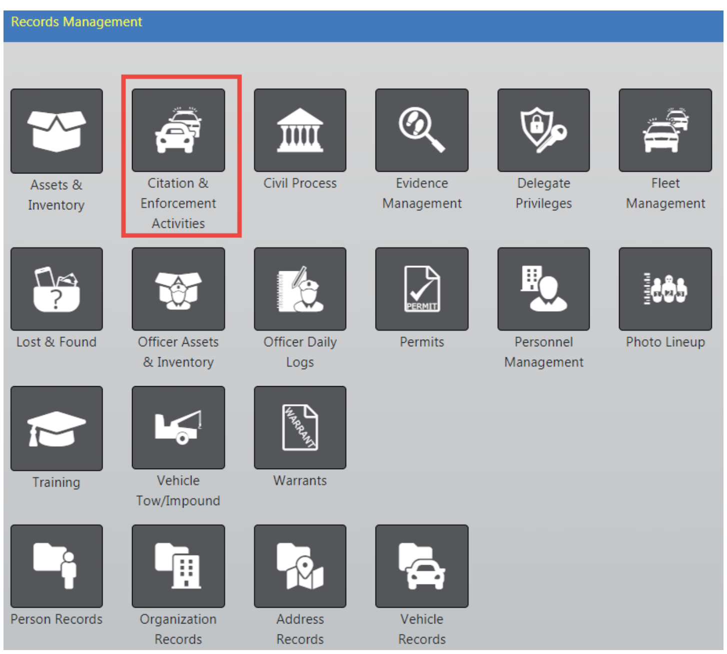
Chapter 27. Citations Enforcement

Citations/Enforcement Overview

This module is a collection of Citation/Enforcement activities against persons, businesses, and/or vehicles. These activities can be related to Incident Reports, other Citation/Enforcement Activities, and other defined report types.

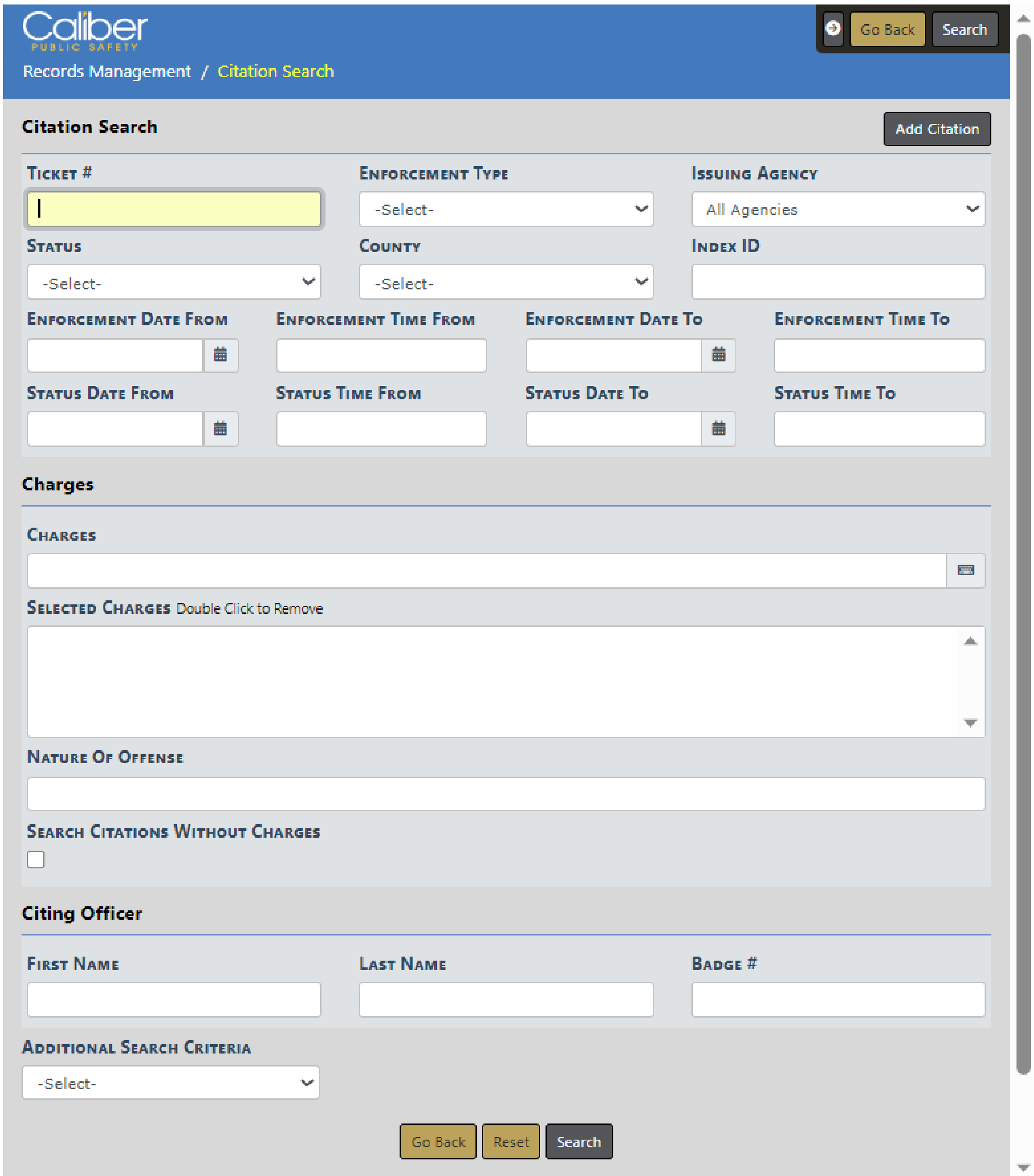
To access **Citation/Enforcement** records, select the **Citations/Enforcements** option from the *Records Management* drop-down menu or select the **Citation/Enforcement Activities** Icon-/link from the *Records Management* main page.

OR



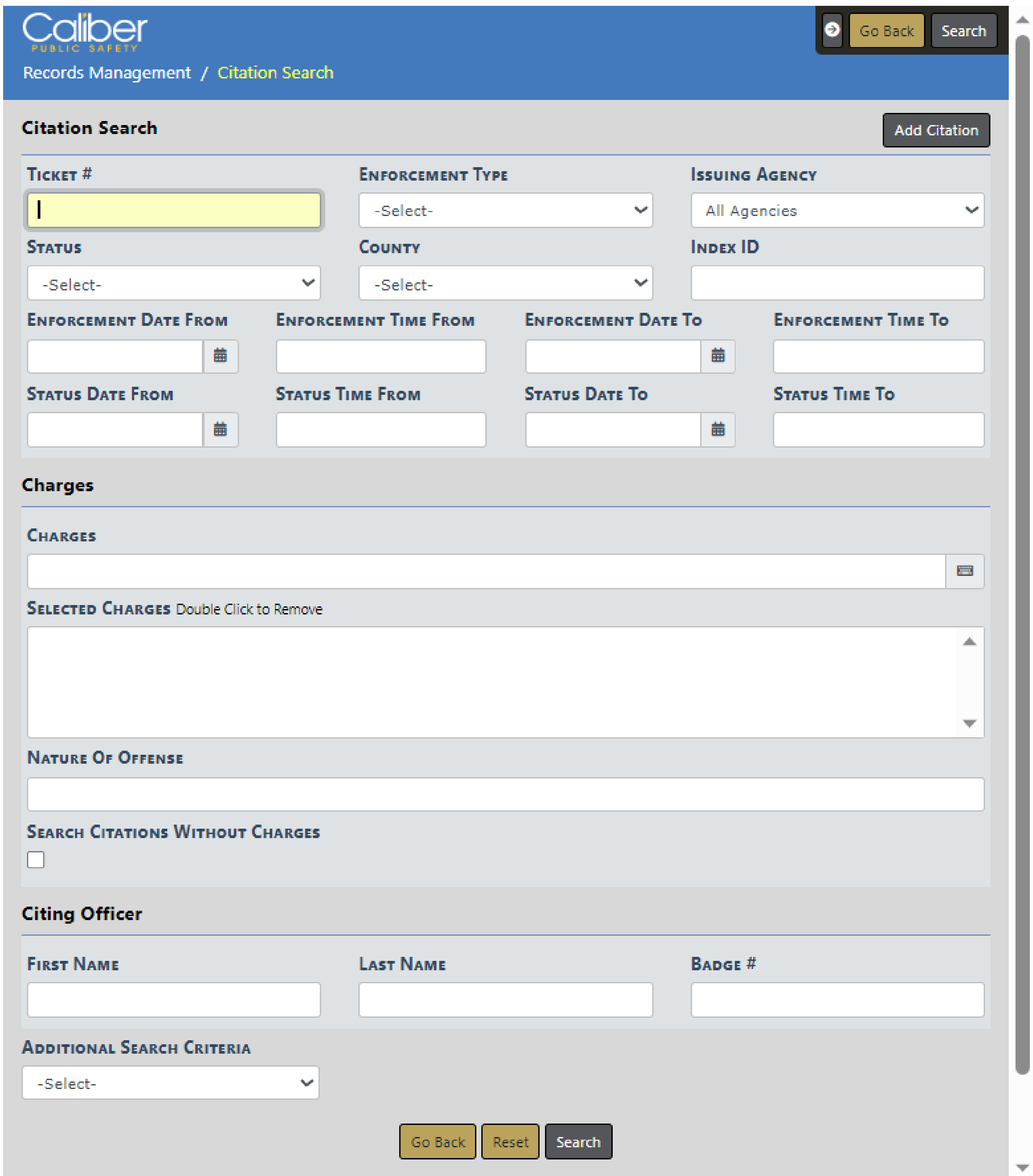
After selecting one of the above options, the **Citation Search** page opens. You can either search for an existing citation by entering search criteria into the available field then click **Search**, or click the **Add Citation** button to add a new citation.

Note: Checking the box for Citations Without Charges will filter results for citations that do not have any charge information entered.

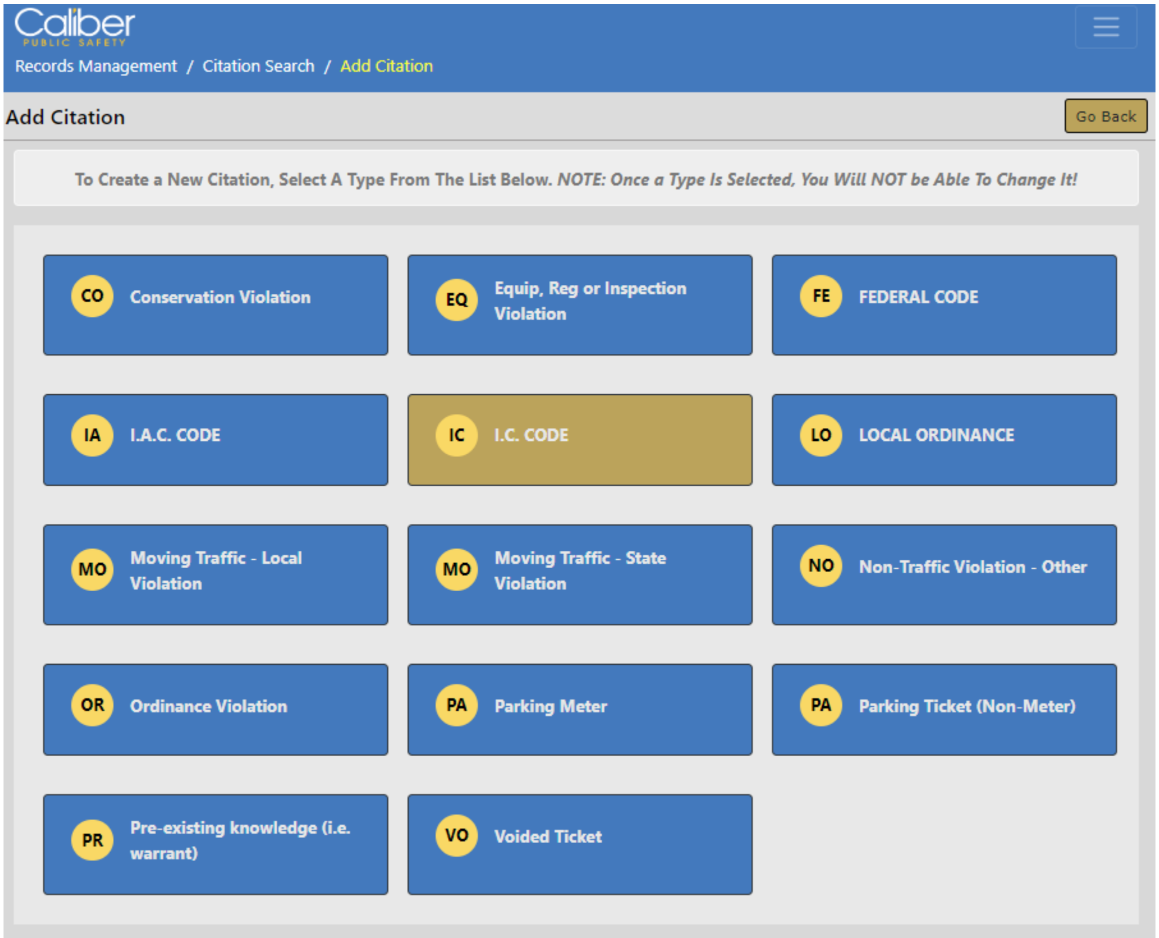


Add a New Citation

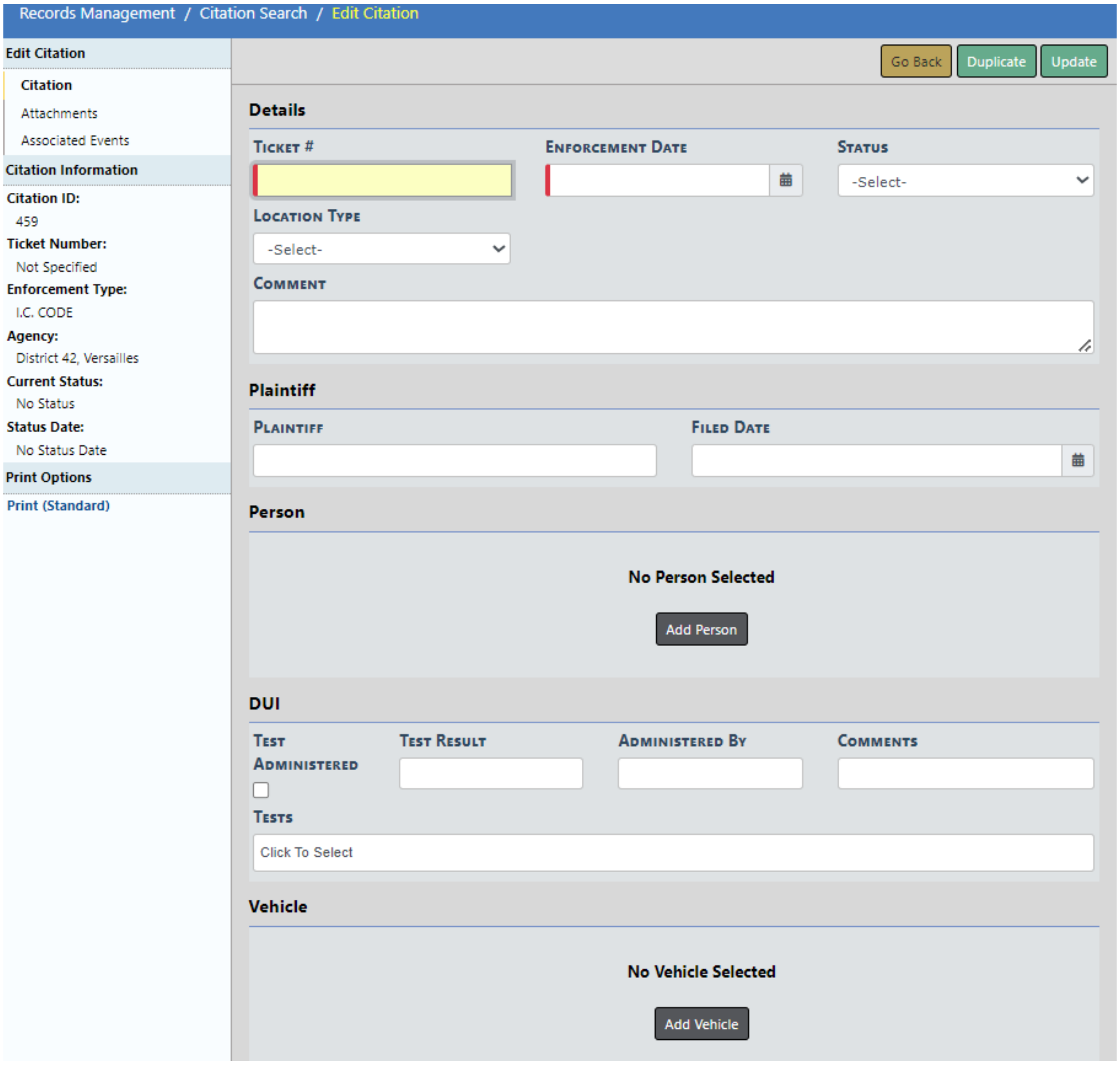
1. To **Add** a new **Citation**, select the **Add Citation** button on the **Citation Search** page.



2. The **Add Citation** page appears. To create a new citation, select a type from the list (each box will highlight yellow if you mouse over it) and click the button to add a citation of the desired type.



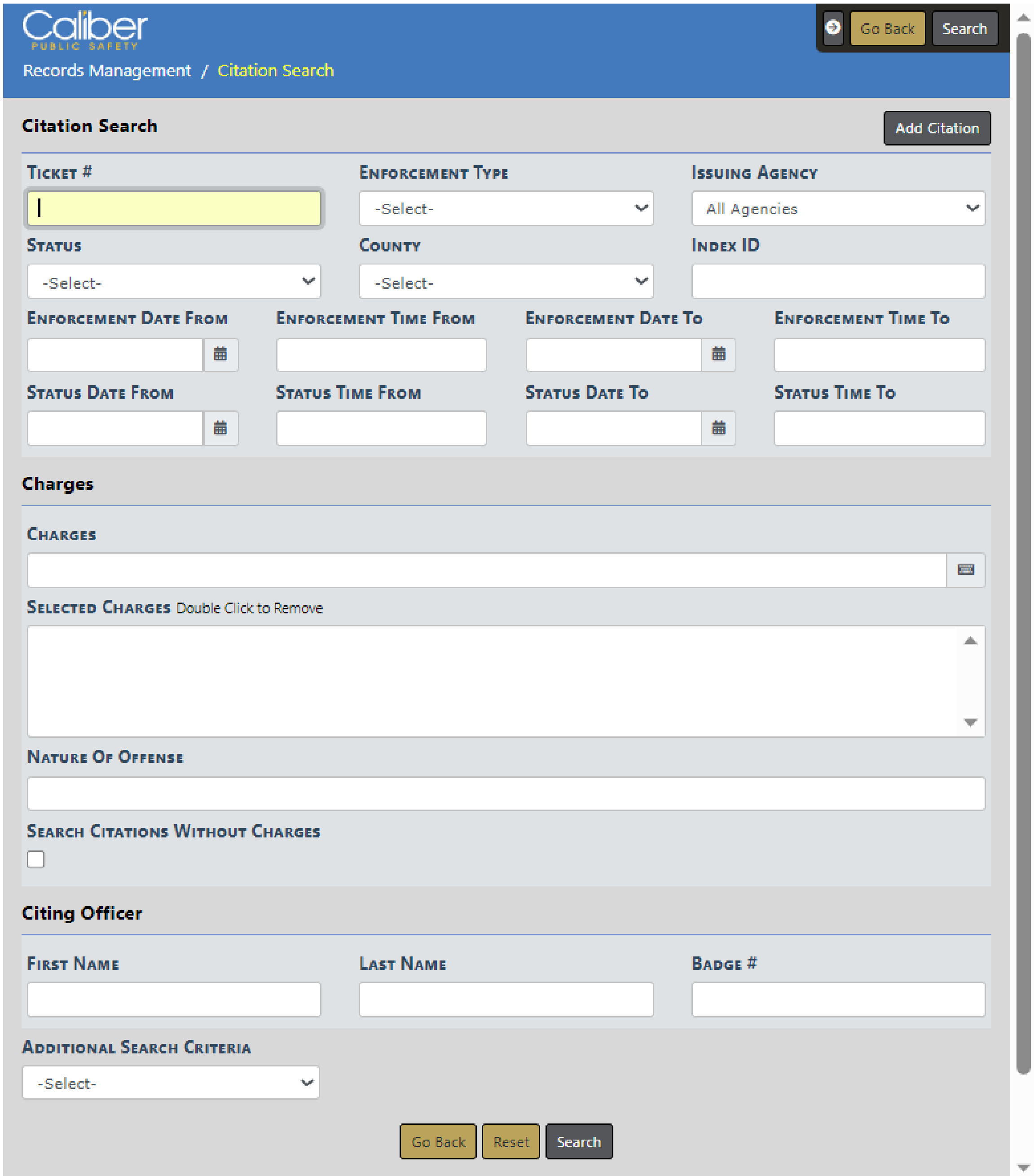
3. The **Edit Citation** page appears. Add the necessary information for the new citation.



4. Adding details like persons, vehicles, or organizations will call up search pages for these entries. For detailed instructions see "Enter or Update Citation Details" on page 572.

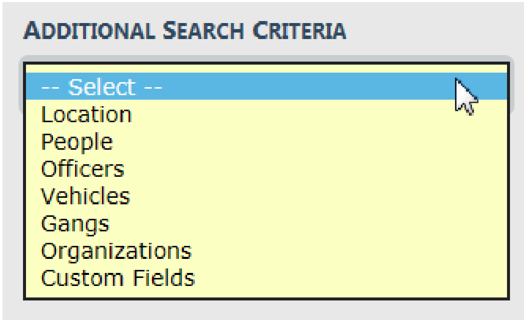
Edit Citation

1. Complete the necessary fields on the **Citation/Enforcement Activities** page to search for the **Citation** you want to **Edit**.



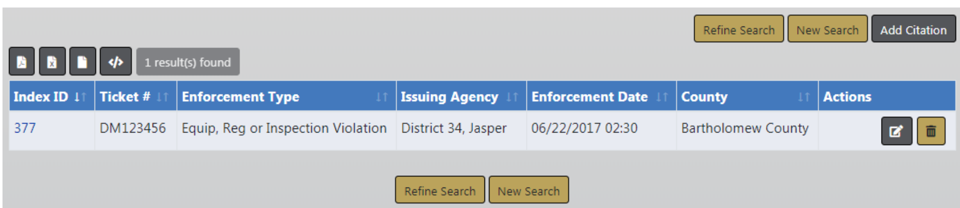
The **Nature of Offense** field is free text that allows you to enter additional charging information not contained in the Charge Code LOV. For agencies having an interface that imports citation data into Online RMS from an *eCitation System*, the **Nature of Offense** field contains charging descriptions as entered in the *eCitation System* when a charge code does not exist in Online RMS.

The **Additional Search Criteria** allows you to include information from a specific section, if needed. Additional search fields appear if you choose one of the available options from the list.



Note: *Custom Fields* is available for agencies that have the *Custom Fields* feature enabled. *Custom Fields* captures data defined by the agency. For more information refer to your administrator.

2. Click the **Search** button to display the **Search Citations** results grid with a list of records matching the search criteria.



You have the ability to export the search results to various file types such as, PDF, MS Excel, CSV, and XML using icons above the IndexID on the Search Results grid. For more information refer to "Export Search Results" on page 36.

Click the **Add Citation** button to add a new citation. For more information on adding a new citation refer to "Add a New Citation" on page 563.

Your assigned roles determine which actions are available to you from the *Actions* column, located on the right. If an icon does not appear in the Action column then you do not have the ability to perform that action.

For example, if the **Delete** icon does not appear in the *Action* column, then you do not have the ability to delete that item.

- The **View** icon allows you to view a snapshot of the record listed. For more information on viewing Citations refer to "View Citation" on page 570.

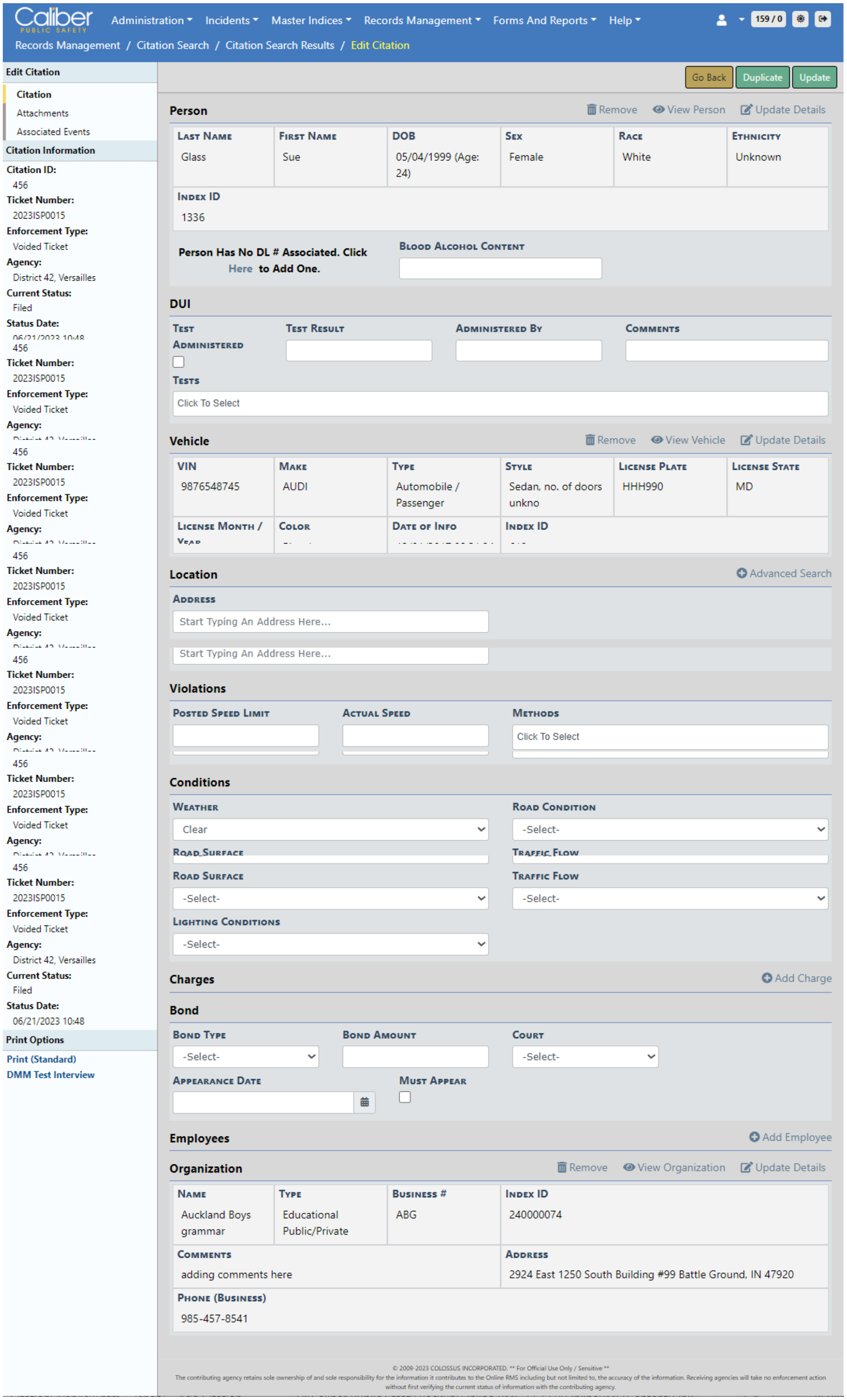
- The **Edit** icon allows you to open and edit the record listed.

- The **Delete** icon allows you to delete the record listed. For details on deleting Citations refer to "Delete Citation" on page 578.

Click **Refine Search** or **New Search** to return to the **Citation Search** page, where you can redefine your search, start a new search (click **Reset** to clear all fields), or **Go Back** to return to the previous page.

3. Click the **Edit** icon to open the **Edit Citation/Enforcement Details** page.

   There are several sections that make up this page. Edit detials and search for, add, or change relevant persons, vehicles, organizations, etc.


Caliber PUBLIC SAFETY
Administration Incidents Master Indices Records Management Forms And Reports Help
159 / 0
Records Management / Citation Search / Citation Search Results / Edit Citation
Edit Citation
Citation
Attachments
Associated Events
Citation Information
Citation ID:
456
Ticket Number:
2023ISP0015
Enforcement Type:
Voided Ticket
Agency:
District 42, Versailles
Current Status:
Filed
Status Date:
06/21/2023 10:48
Print Options
Print (Standard)
DMM Test Interview
Go Back
Duplicate
Update
Person
Remove View Person Update Details
Last Name Glass
First Name Sue
DOB 05/04/1999 (Age: 24)
Sex Female
Race White
Ethnicity Unknown
Index ID 1336
Person Has No DL # Associated. Click Here to Add One.
Blood Alcohol Content
DUI
Test Administered
Test Result
Administered By
Comments
Tests
Click To Select
Vehicle
Remove View Vehicle Update Details
VIN 9876548745
Make AUDI
Type Automobile / Passenger
Style Sedan, no. of doors unkno
License Plate HHH990
License State MD
License Month / Year
Color
Date of Info
Index ID
Location
Advanced Search
Address
Start Typing An Address Here...
Start Typing An Address Here...
Violations
Posted Speed Limit
Actual Speed
Methods
Click To Select
Conditions
Weather Clear
Road Condition -Select-
Road Surface -Select-
Traffic Flow -Select-
Lighting Conditions -Select-
Charges
Add Charge
Bond
Bond Type -Select-
Bond Amount
Court -Select-
Appearance Date
Must Appear
Employees
Add Employee
Organization
Remove View Organization Update Details
Name Auckland Boys grammar
Type Educational Public/Private
Business #ABG
Index ID 240000074
Comments adding comments here
Address 2924 East 1250 South Building #99 Battle Ground, IN 47920
Phone (Business) 985-457-8541
© 2009-2023 COLOSSUS INCORPORATED. ** For Official Use Only / Sensitive **

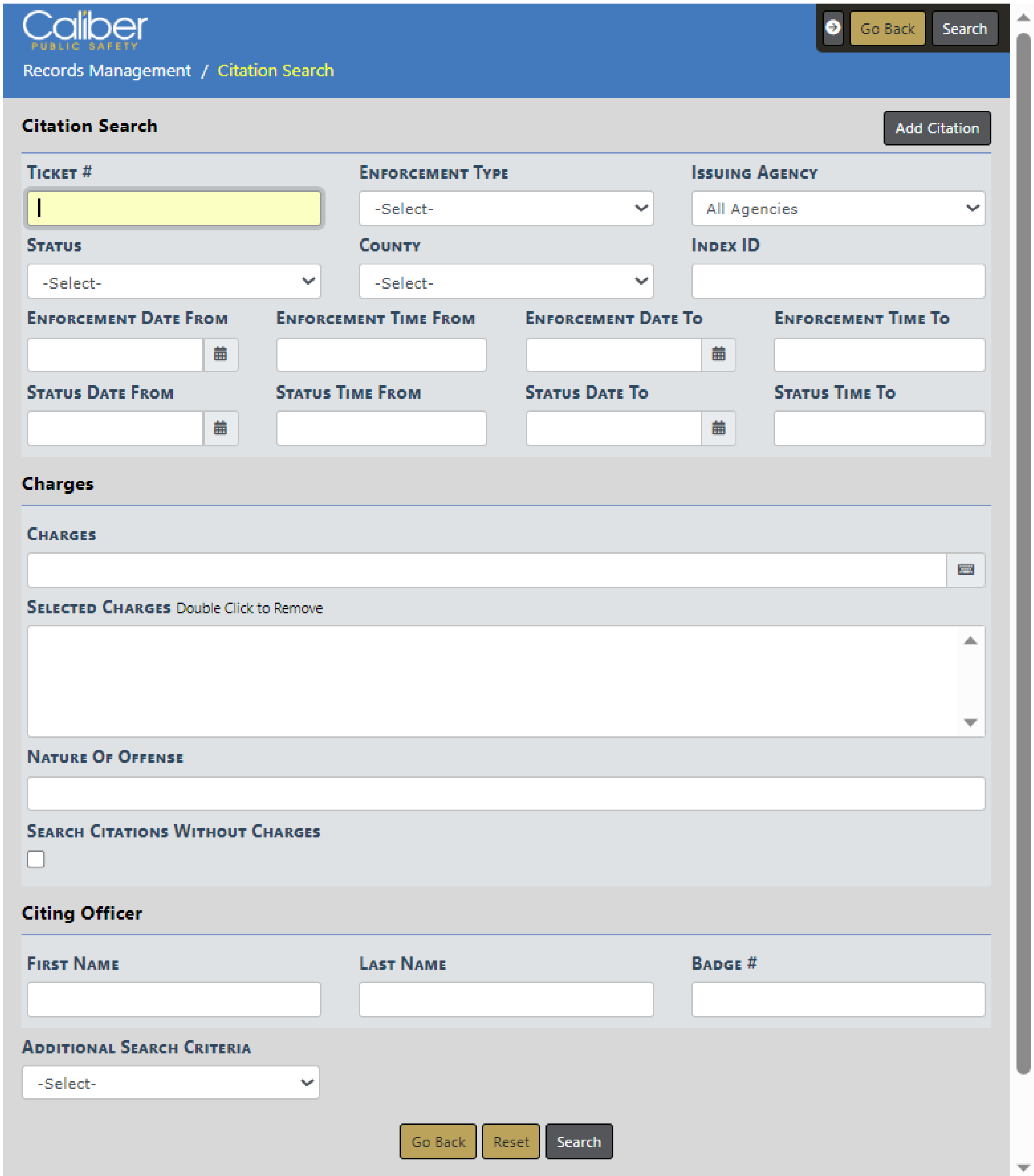
Click on the **Duplicate** button to create another **Citation** identical to the one you are on. For more information refer to "Duplicate Citation" on page 577.

Click on the **Print** link in the **Print Options** menu to print the **Citation**. For more information refer to "Print Citation" on page 580.

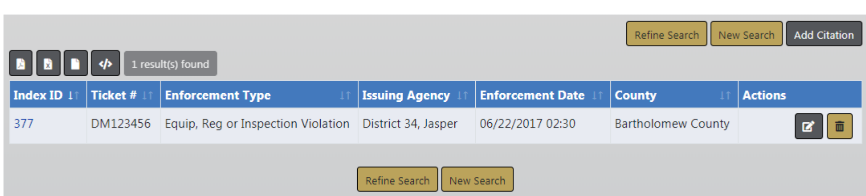
4. Complete all applicable sections and choose **Update**. For detailed instructions see "Enter or Update Citation Details" on page 572.

View Citation

1. Complete the necessary fields on the **Citation Search** page to search for the **Citation** you want to **View**.



2. Click the **Search** button to display the **Search Citations** results grid with a list of records matching the search criteria.



3. Click the **View** icon to open the **Citation/Enforcement Details** page.
4. Click on the **Go Back** button to return to the search results, or click on the **Print** button to print the **Citation**. For more information refer to "Print Citation" on page 580.

Enter or Update Citation Details

Whether you are creating a new **Citation** or updating one that already exists, the process of entering the details is fundamentally the same.

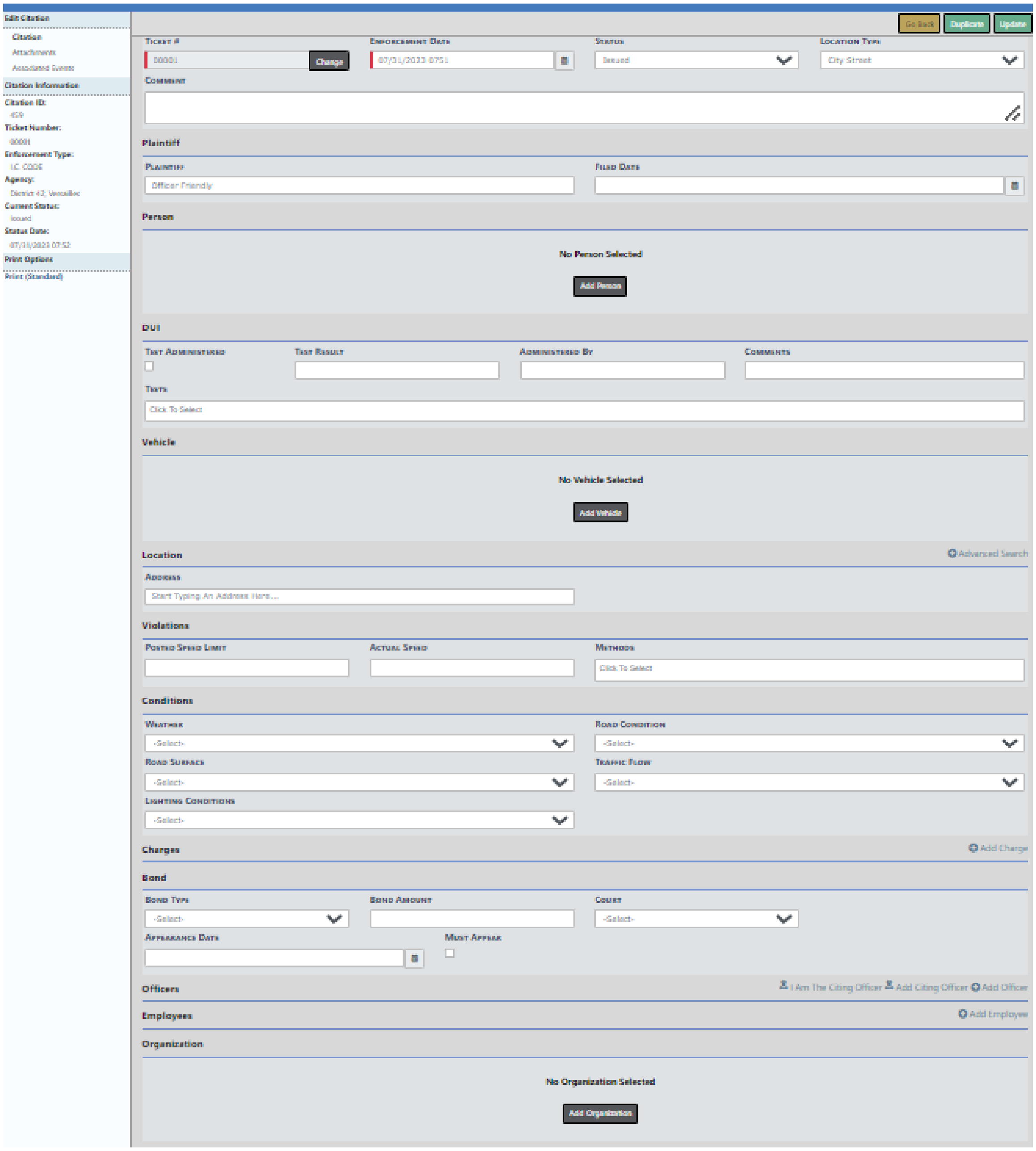
Citation data is grouped into various sections. The **Citation** module utilizes *Master Indices*. *Master Indices* are centralized pieces of data that are accessed from different modules of the system for consistency. Each index is represented only once, such as a person, an address, a vehicle, a location, and the organization.

Note: For more information on *Master Indices* refer to "Master Indices" on page 83.

Person, Vehicle, Location, Organization

Sections containing **Search** links for details like Person, Vehicle, and Organization utilize the *Master Index*. You must first search the *Master Index* to determine whether or not this data already exists before adding or updating. If the record exists, you must use it in the **Citation**. If the record doesn't exist, then you can create it, providing you have the proper permissions. For more information on permissions see your administrator.

Click the **Update** button in each section to save the entered data.



Racial Profiling

The **Enforcement Type** determines whether or not the Racial Profiling fields appear. For example, the fields appear when *Ordinance Violation* is chosen, but not for *Parking Meter*.

Select an option from the drop-down menu in each field of the **Racial Profiling** section. Click the **Race Known At Time of Stop** button if it is a true statement; green represents true and gray represents false.

Violations and Charges

For Violations, enter the **Posted Speed Limit** and **Actual Speed limit**, if applicable, and select one or multiple violation **Methods** from the drop-down list.

Click **Save**.

Click on the *+Add Charge* link to open the **Citation Charge** window. Begin typing the desired Charge Statute to view a list of similar charges then select the one you need from the list.

Select the **Class** and **Disposition**. These each contain a drop-down list in accordance with the **Charge Statute** selected.

Complete all other fields required by your Agency, then click **Save**.

Note: Multiple charges can be listed on one citation (according to your Agency). You must add additional items for each charge (Class, Disposition etc.).

Click **+Add Charge** to add additional charges, if applicable. Click **Save** after entering each **Charge**.

Click **Go Back** to return to the previous page.

Bond

To enter Bond information, select the **Bond Type** from the drop-down list, enter the **Bond Amount**, **Appearance Date**, and click the **Must Appear** button if the person must appear; the button turns green when selected.

Click **Save**.

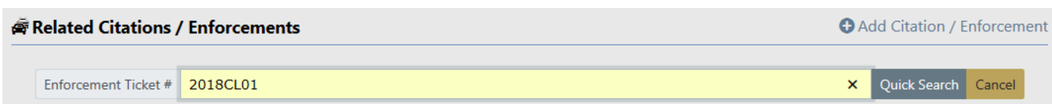
Associate Incident Reports

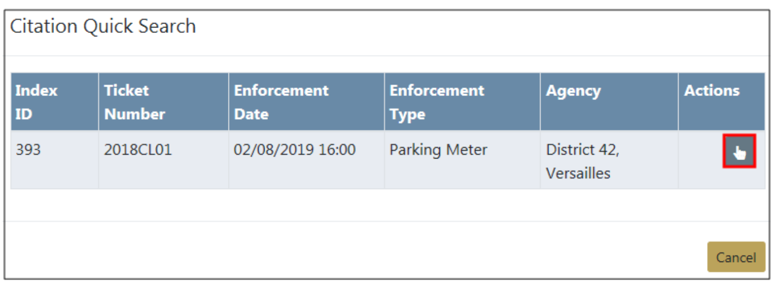
You can associate Incident Reports to the Citation. Click on **+Add Incident Report** to open the Incident Search screen, search for the incident and select it. For more information on searching Incidents, refer to "View Incident Reports" on page 265.

PDF documentation can be added to the citation automatically where applicable, if such documentation exists in the incident report or as attached to a person entry, etc.

Relate Citations

You can associate other citations with the current citation. Click **+Add Citation/Enforcement**, enter the **Enforcement Ticket#** in the field provided, click **Quick Search**, then select the appropriate Citation from the results list.



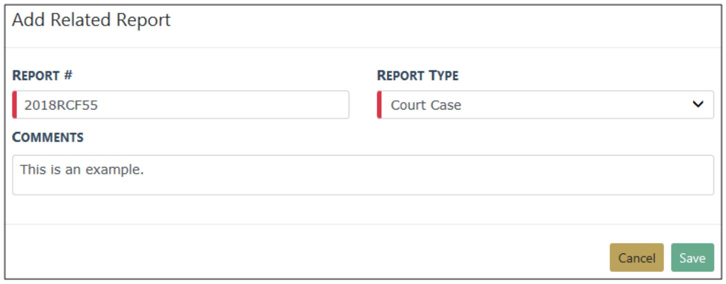

Citation Quick Search

Index ID	Ticket Number	Enforcement Date	Enforcement Type	Agency	Actions
393	2018CL01	02/08/2019 16:00	Parking Meter	District 42, Versailles	

Cancel

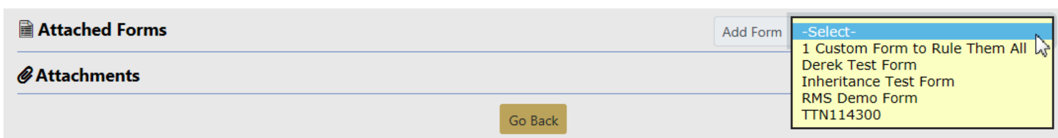
Associate Other Related Reports

You can associate other reports as defined by your agency. Click **+Add Report** to open the *Add Related Report* window, enter the **Report #**, select the **Report Type** from the drop-down list, enter necessary **Comments**, then click **Save**.



Attached Forms

If applicable to your agency, you can attach a custom form. Select an item from the **Add Form** drop-down list to open the chosen form. Complete the necessary fields, then click **Save** to remain on the form, or **Save And Exit** to save the form and return to the Citation. Click Cancel to return to the Citation without adding a custom form.



Attachments

You can add photos and documents to the Citation. Click on **+Add Attachment** to open the *Add Attachments* screen. For more information on Attachments, refer to "Attachments" on page 69.

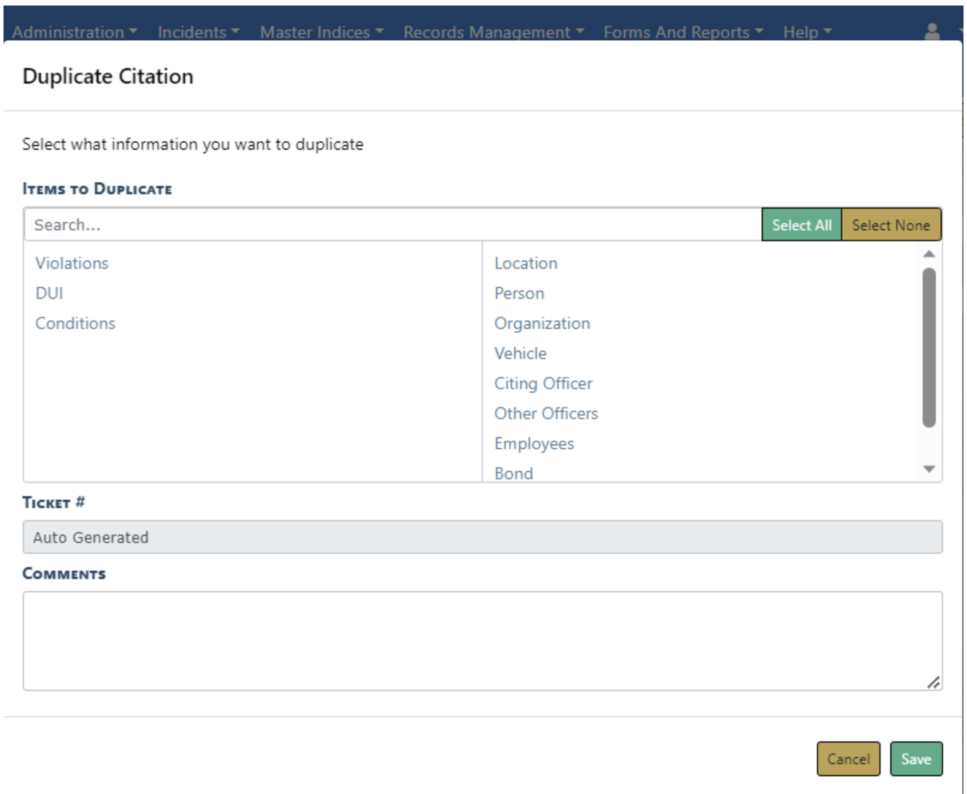
All Other Sections

Data entry in all other sections are fundamentally similar to adding Charges, but with different information.

Duplicate Citation

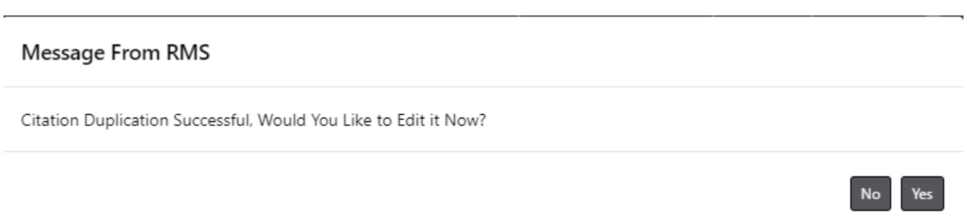
In cases where two or more people are being cited for the same charge(s), it may be more efficient to create one ticket, duplicate it, and then edit the duplicate for another person. The process can be repeated as many times as needed.

1. After entering and saving the **Citation**, click the **Duplicate** button to open the **Duplicate Citation** window.



2. Click the items in the left column that you want to duplicate, which moves these items to the right column. Click any item in the right column to remove it, sending it back to the left-column list.

3. The ticket number is auto-benerated. Enter any additional comments and click the **Duplicate** button at the bottom of the window to display the message prompt:

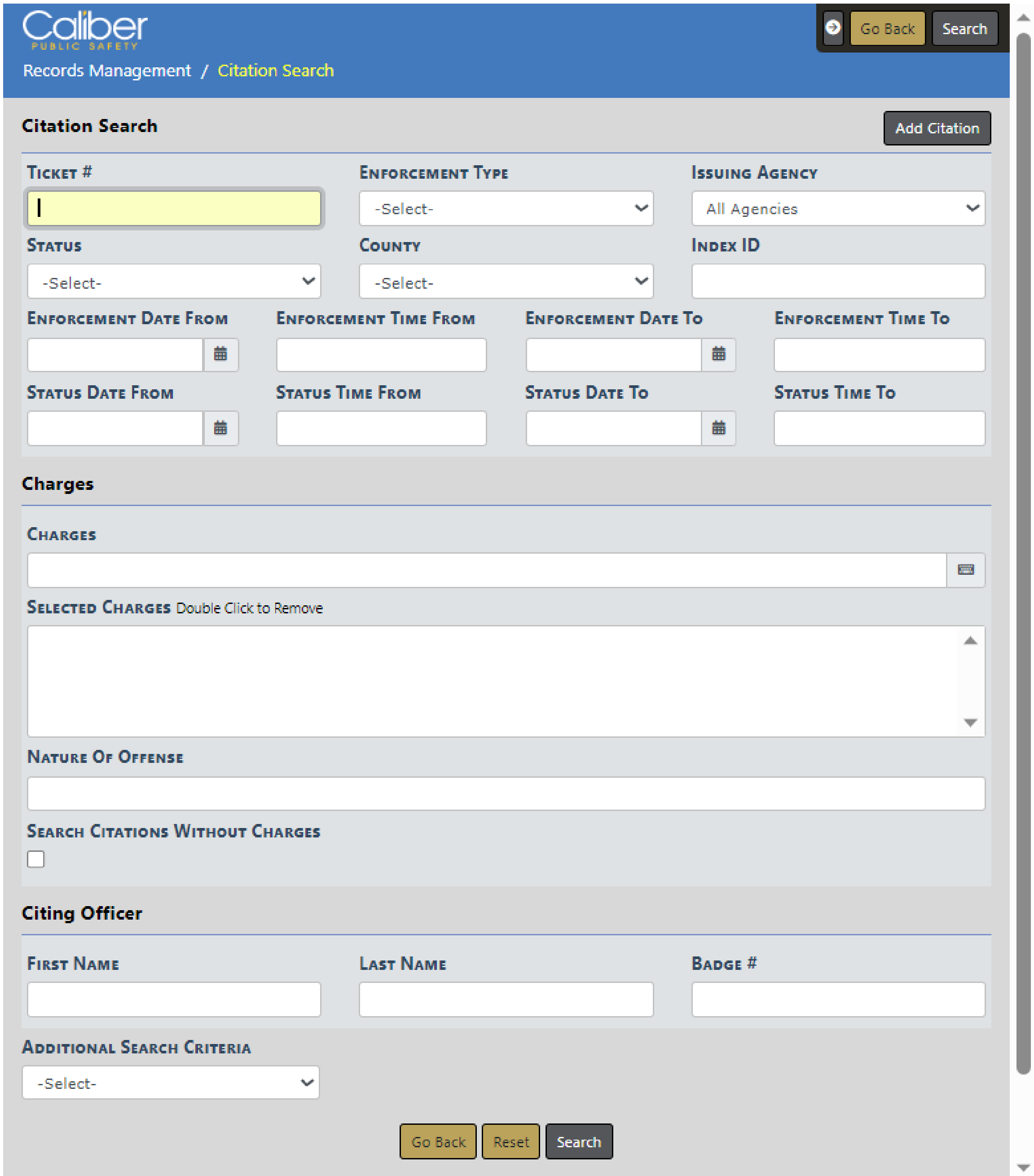


4. Click **Yes** to edit the duplicate citation as needed. For more information on editing a citation, refer to "Edit Citation" on page 565.

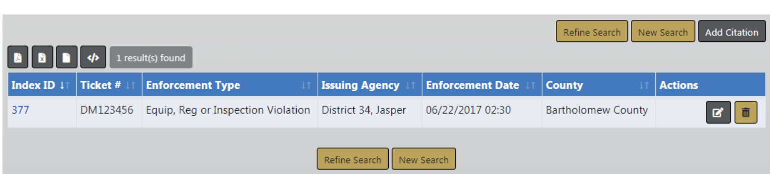
Delete Citation

On rare occasions you may need to delete a **Citation**, if you have proper permissions to do so.

1. Complete the necessary fields on the **Citation Search** page to search for the **Citation** you want to **Delete**. For more information on searching for a Citation, refer to "Edit Citation" on page 565.

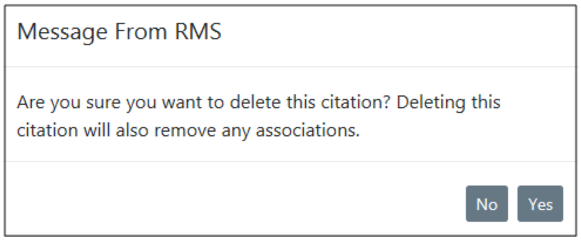


2. Click the **Search** button to display the **Search Results** page with a list of records matching the search criteria.

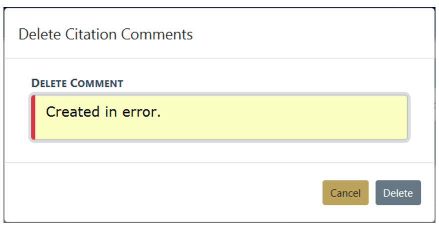


The **Delete** Icon in the *Actions* column allows you to **Delete** the record listed. If the delete icon does not display, then it is likely you do not have permissions to delete it. For more information on permissions refer to your administrator.

3. Click the **Delete** Icon on the record you want to delete. A confirmation window appears.



4. Click **Yes** to delete or click **No** to return to the search results without deleting. If you clicked **Yes**, a comment window appears.



5. Enter the reason for deleting the Citation then click **Delete**.

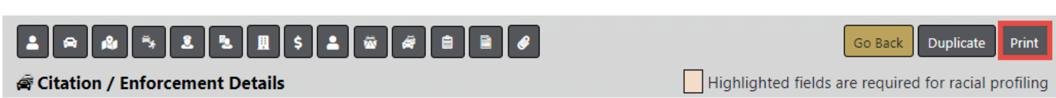
Print Citation

You can print a citation you are viewing or editing.

For more information on editing a citation refer to "Edit Citation" on page 565.

For more information on viewing a citation refer to "View Citation" on page 570.

1. Click the **Print** button while on the **Edit Citation/Enforcement Activity** page or the **View Enforcement** page.



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

Note: If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

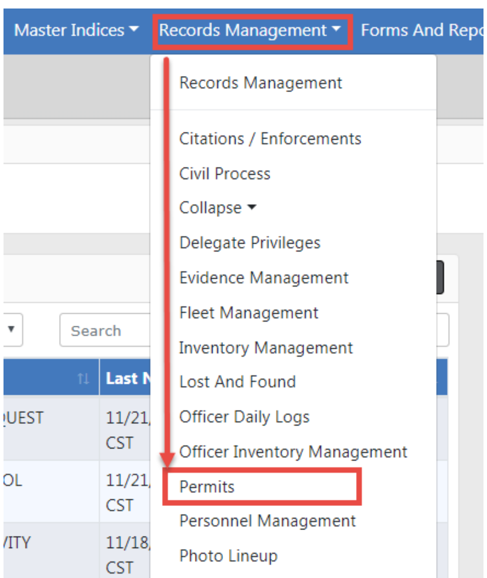
Chapter 28. Permits

Permits Overview

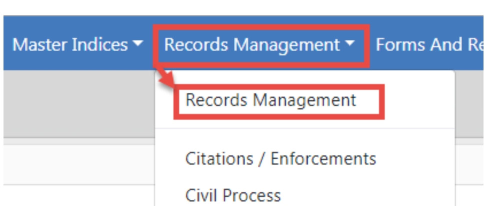
The **Permits** module allows you to view, create, or modify permit information. **Permits** include alcohol permits, bicycle licenses, burning permits, gun purchase permits, parking permits, etc. The type of permit is controlled by the Agency Administrator.

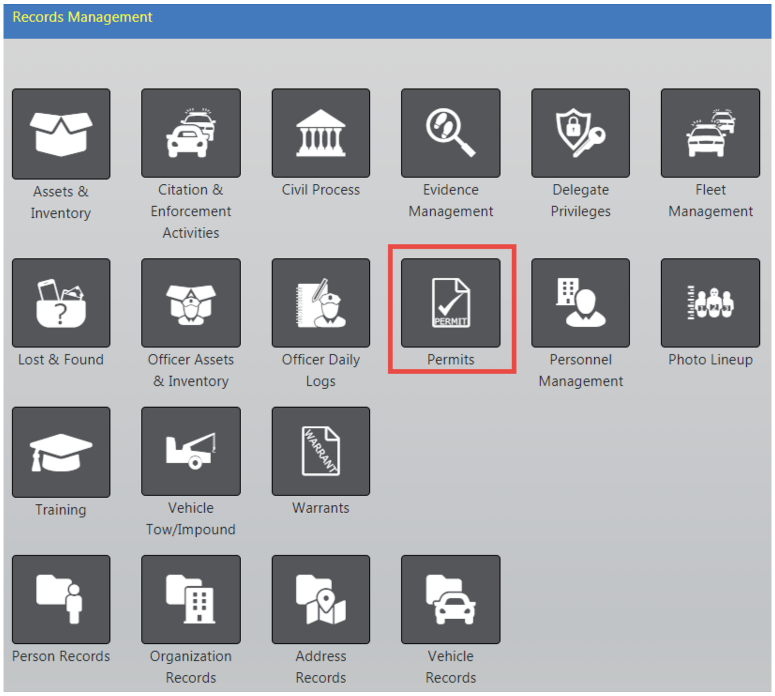
There are two ways to access the **Permit** module:

1. Click *Records Management* on the navigation bar, then click the **Permits** option from the drop-down menu.

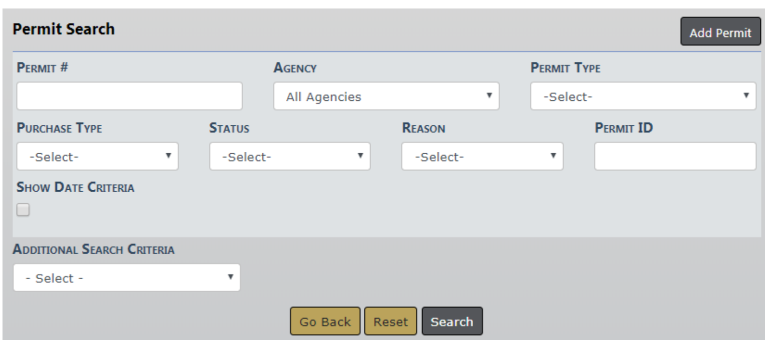


2. Or click *Records Management* on the navigation bar, click the **Records Management** option from the drop-down menu, then click the **Permits** Icon/link.





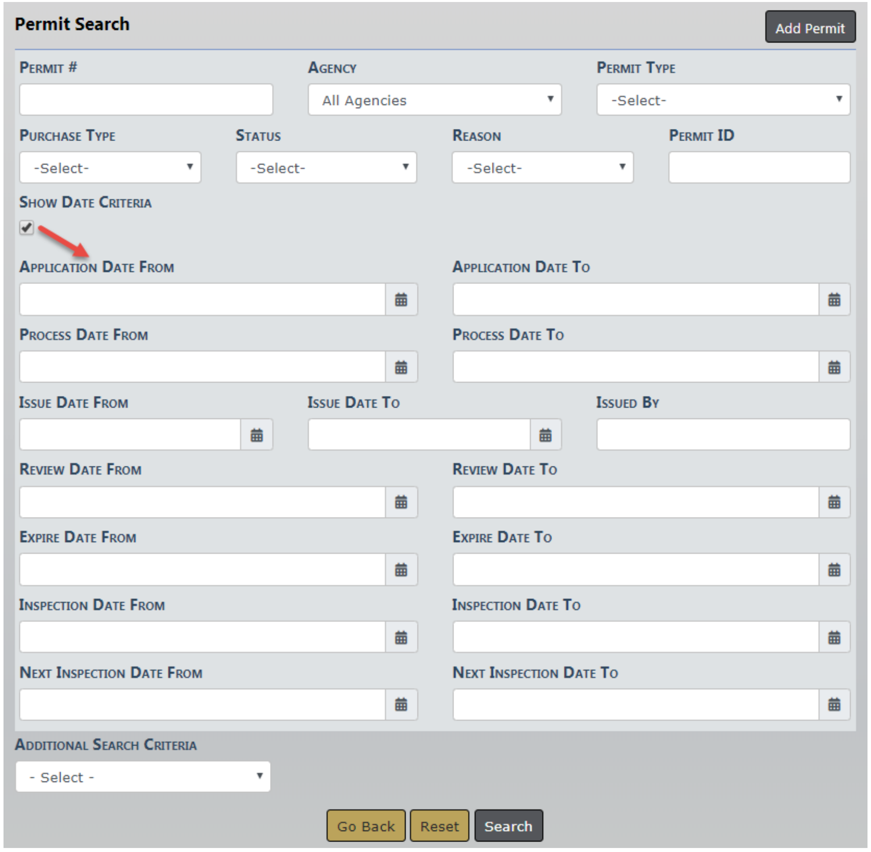
Either option opens the *Permit Search* page.



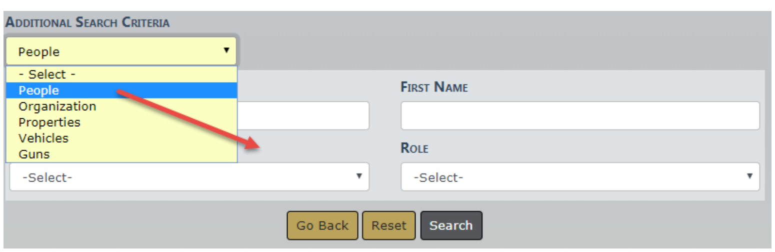
Search Permits

From the **Permit** page complete as many of the fields in the *Permit Search* section as you can.

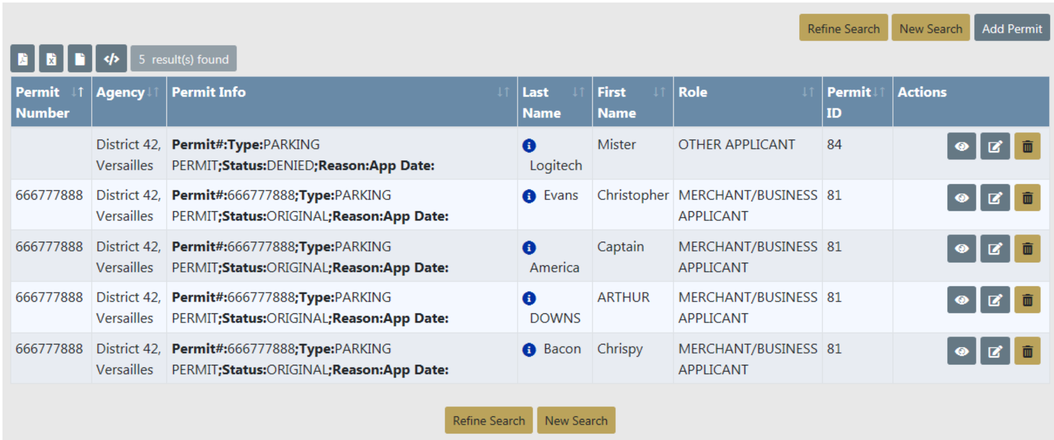
If applicable, click the **Show Date Criteria** button to open the *Date Criteria* section.



If applicable, select the down arrow next to **Additional Search Criteria** on the bottom left to open the drop-down list. Select the appropriate option to open another section where you can add information about People, Organization, Property, Vehicles, or Guns.



Enter your search criteria in the applicable search fields, then select **Search**. The *Permit Search Results* page displays all search results that meet the parameters of your search.



Permit Number	Agency	Permit Info	Last Name	First Name	Role	Permit ID	Actions
	District 42, Versailles	**Permit#:Type:**PARKING PERMIT**;Status:**DENIED**;Reason:App Date:**	Logitech	Mister	OTHER APPLICANT	84	
666777888	District 42, Versailles	**Permit#:**666777888**;Type:**PARKING PERMIT**;Status:**ORIGINAL**;Reason:App Date:**	Evans	Christopher	MERCHANT/BUSINESS APPLICANT	81	
666777888	District 42, Versailles	**Permit#:**666777888**;Type:**PARKING PERMIT**;Status:**ORIGINAL**;Reason:App Date:**	America	Captain	MERCHANT/BUSINESS APPLICANT	81	
666777888	District 42, Versailles	**Permit#:**666777888**;Type:**PARKING PERMIT**;Status:**ORIGINAL**;Reason:App Date:**	DOWNS	ARTHUR	MERCHANT/BUSINESS APPLICANT	81	
666777888	District 42, Versailles	**Permit#:**666777888**;Type:**PARKING PERMIT**;Status:**ORIGINAL**;Reason:App Date:**	Bacon	Chrispy	MERCHANT/BUSINESS APPLICANT	81	

The Icons in the *Actions* column display based on our role.

Select  to view a permit.

Select  to open a permit for editing.

Select  to delete a permit.

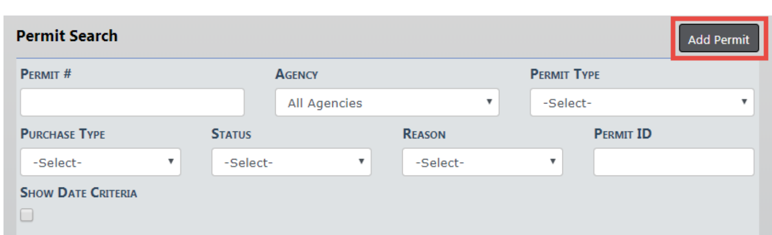
Several actions are available from the *Permit Search Results* page. These are indicated by four icons under the *Search Results* tab:

You can then export your search results into that type of document. The **Add Permit** button accesses the *Add Permits* page where you can add a new **Permit**.

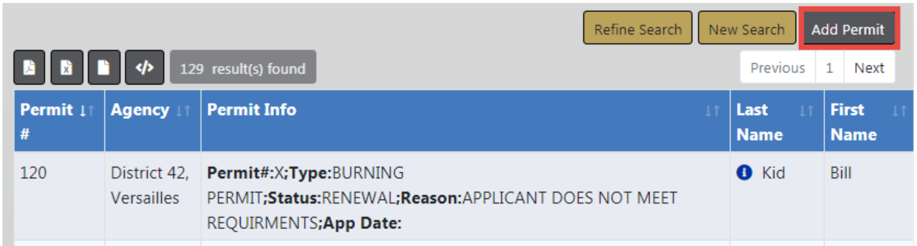
Add Permit

There are two ways to access the **Add Permit** page:

- The **Add Permit** button on the *Permit Search* page.

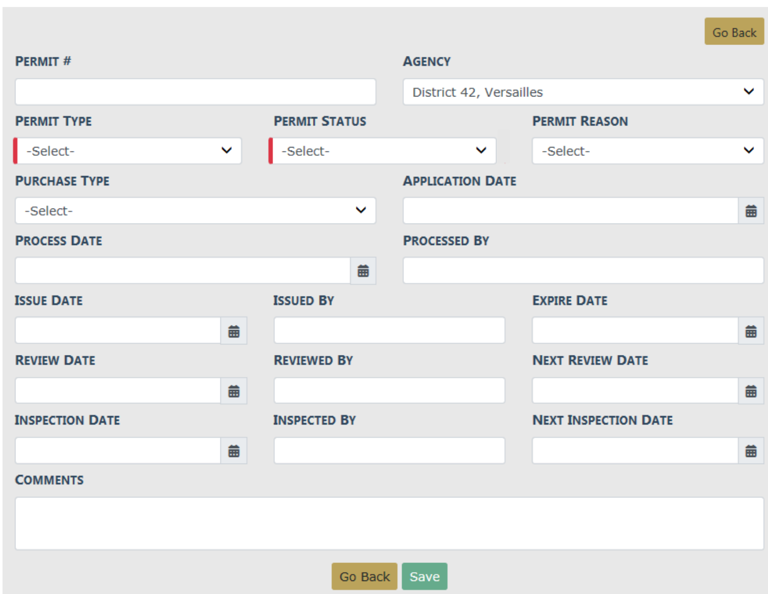


- The **Add Permit** button on the *Permit Search Results* page.



For search details, refer to "Search Permits" on page 584.

Complete the *Add Permit* page.

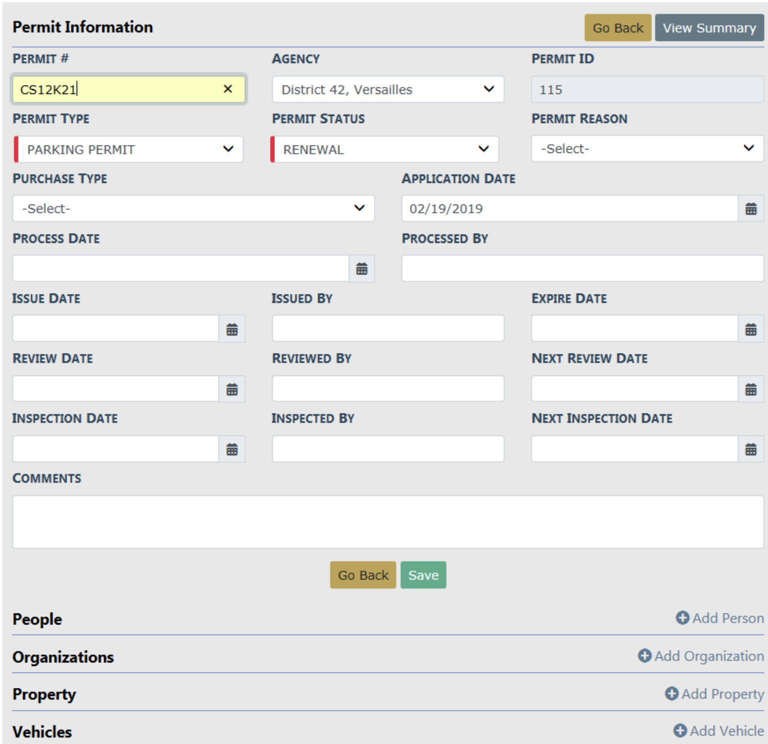


The only required fields for adding a permit are the **Permit Type** and **Status** fields, both of which have a drop-down list from which to select.

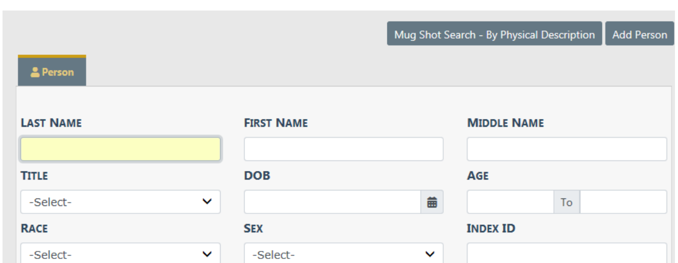
Once you have entered all the information, select **Save**, this will open the **Edit Permit** page.

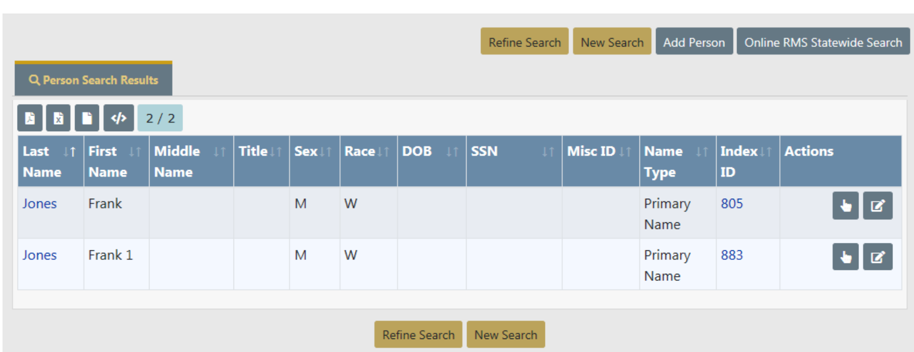
Edit Permit

To edit a permit you either must have edit permissions, or you must add and save a new permit to open the **Edit Permit** page.



To add additional information to the permit such as, People, Organization, Property, Vehicle, Attachments you must select the appropriate **+Add** link. You will first search for the record; i.e. People.

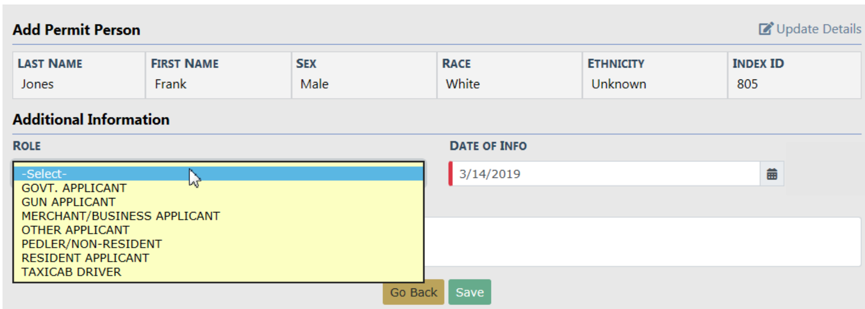




Use the  under the *Actions* column to select the Person.

If there are no results found during your search, use the **Add Person** button. For more information on adding a person, refer to "Adding Person" on page 100 in the *Master Indices* module.

When you make a selection the *Add Permit Person* page opens.



The **Date Of Info** defaults to the current date. You must make a selection from the drop-down for the **Role**. After you have made your selection, select **Save**. It brings you back to the **Edit Permit** page.

Once you have added all the necessary information to the **Permit**, select the**View Summary** button to review your work on the *Permit Details* page.

If you need to add or change information in the **Permit**, do so then select **Update Details**.

If you need to go back to the previous page, select the **Go Back** button.

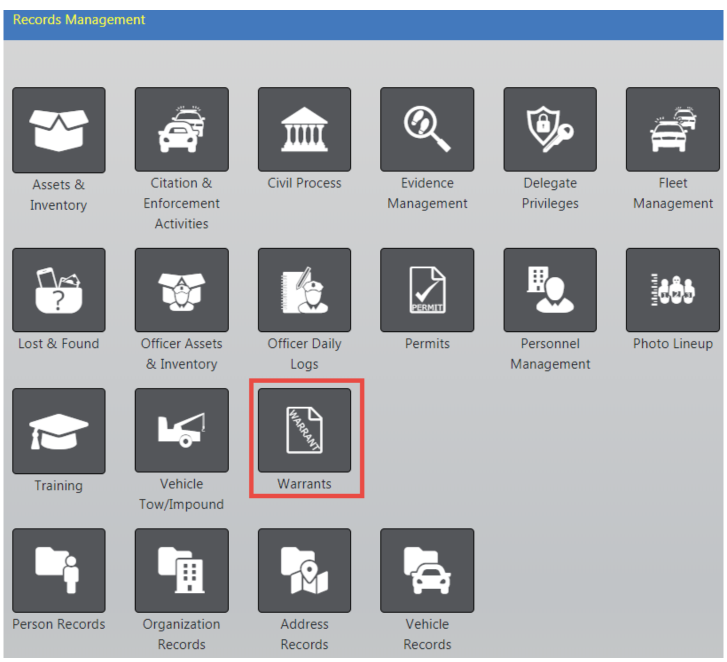
Chapter 29. Warrants

Warrants Overview

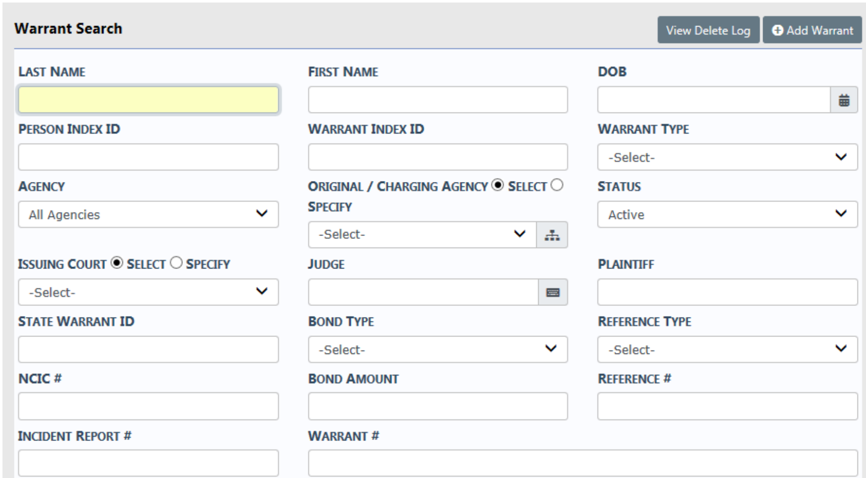
The **Warrants** module handles the workflow of warrants in the Online RMS system. Information entered in this module drives the process of creating, activating, serving, and/or recalling warrants. Warrant logs are maintained throughout the lifecycle of the warrant, as are notifications to users in the system regarding the **Warrant**.

To access the **Warrants** module, select the **Warrants** option from the *Records Management* drop-down menu or select the **Warrants** Icon/link from the *Records Management* pages.

Or click *Records Management* on the navigation bar, click the **Records Management** option from the drop-down menu, then click the **Warrants** Icon/link.



You are initially brought to the **Warrant Search** page. Caliber Public Safety recommends that you always search for a **Warrant** prior to adding a new one.



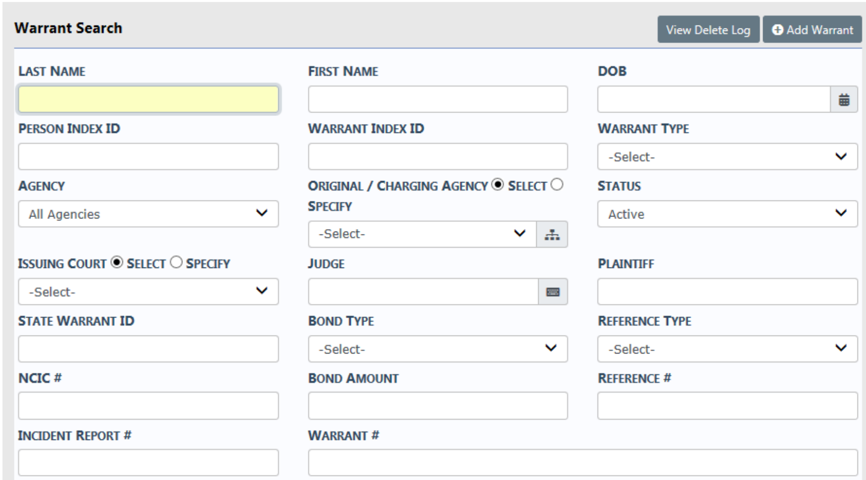
You can view the warrant delete log, add a warrant, and view warrants on the map from the search results page. For more information on search warrants, refer to "Warrant Search" below.

Warrant Search

The **Warrant Search** page allows you to search for a group of warrants or a specific warrant. You can also *View Delete Log* and *Add Warrant* from this page by clicking on the respective links on the top right of the page.

For more information on deleting a warrant, refer to "Delete Warrant" on page 614.

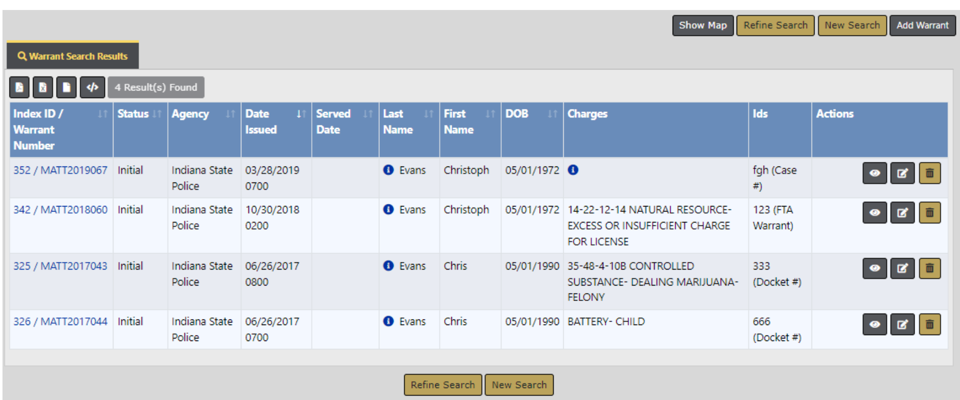
For more information on adding a warrant, refer to "Add Warrant" on page 595.



On the **Warrant Search** page, complete the fields necessary to produce the desired search results. For example, enter the last name *Evans* and first name *Christoph* to display records that match that criteria.

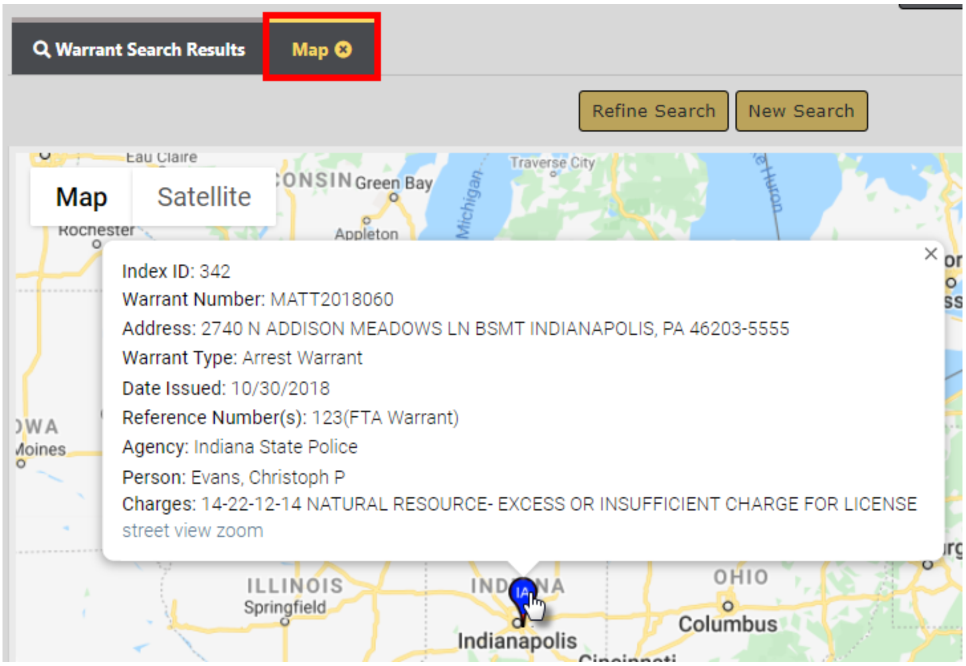
Enter information into the **Warrant Search** page then click **Search** or press the **Enter** key, click **Reset** to clear the entered search data to start the search over, or click **Go Back** to return to the previous screen without searching.

Warrants that meet the search parameters are listed. Icons that display in the *Actions* column depend on your assigned role.



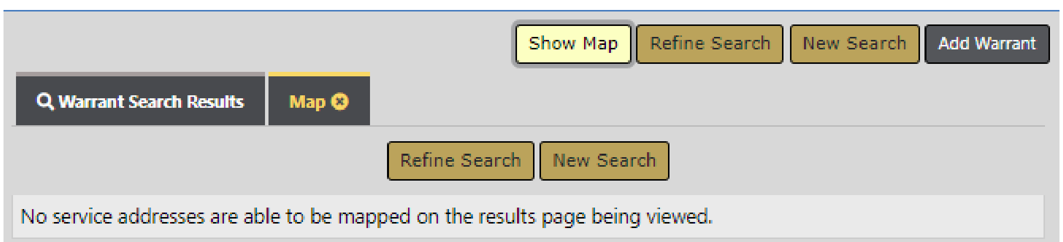
Index ID / Warrant Number	Status	Agency	Date Issued	Served Date	Last Name	First Name	DOB	Charges	Ids	Actions
352 / MATT2019067	Initial	Indiana State Police	03/28/2019 0700		Evans	Christoph	05/01/1972		fgh (Case #)	
342 / MATT2018060	Initial	Indiana State Police	10/30/2018 0200		Evans	Christoph	05/01/1972	14-22-12-14 NATURAL RESOURCE-EXCESS OR INSUFFICIENT CHARGE FOR LICENSE	123 (FTA Warrant)	
325 / MATT2017043	Initial	Indiana State Police	06/26/2017 0800		Evans	Chris	05/01/1990	35-48-4-10B CONTROLLED SUBSTANCE- DEALING MARIJUANA-FELONY	333 (Docket #)	
326 / MATT2017044	Initial	Indiana State Police	06/26/2017 0700		Evans	Chris	05/01/1990	BATTERY- CHILD	666 (Docket #)	

Select the **Show Map** button on the top right of the search results window to open a new tab displaying the current search results on a map. The map appears for the currently displayed page. For example, while you are on page two of three, the map refers to page two only.



- Only warrants with a service address that is GEO-coded display on the map.

  A message stating *"No service addresses are able to be mapped..."* on the Maps tab when none of the Warrants in the search results have a GEO-coded service address.



- Click on any pin on the map to open a pop-up window containing warrant index id, warrant number, address, warrant type, issued date, reference numbers, agency, person, and charges.

Select the **Add Warrant** button to add a new warrant.

Select the **View** icon in the *Actions* column to view a warrant.

Select the **Edit** icon to update a warrant. For more information refer to "Edit Warrant" on page 599.

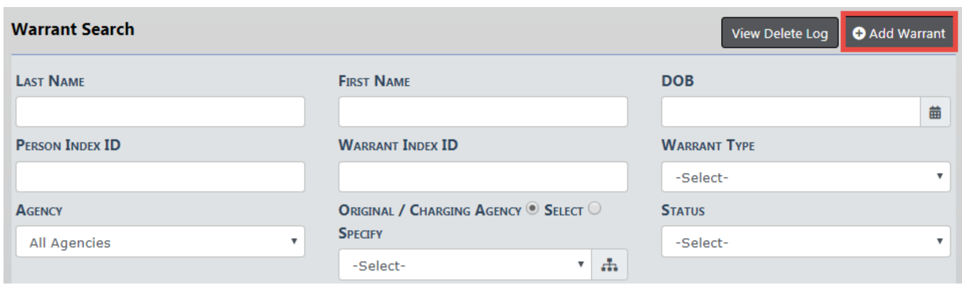
Select the **Delete** icon to delete a warrant. For more information refer to "Delete Warrant" on page 614.

Note: If there is one charge, then it appears in the Charge column; if multiple charges, an information bubble appears. Hover over or click on the bubble for more information.

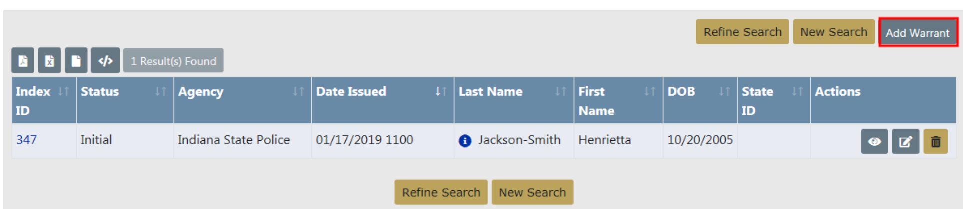
Add Warrant

There are two ways to add a warrant from the **Warrant** module:

- Select the **Add Warrant** link from the *Warrants Search* page



- Select the **Add Warrant** button from the *Warrant Search Results* page.

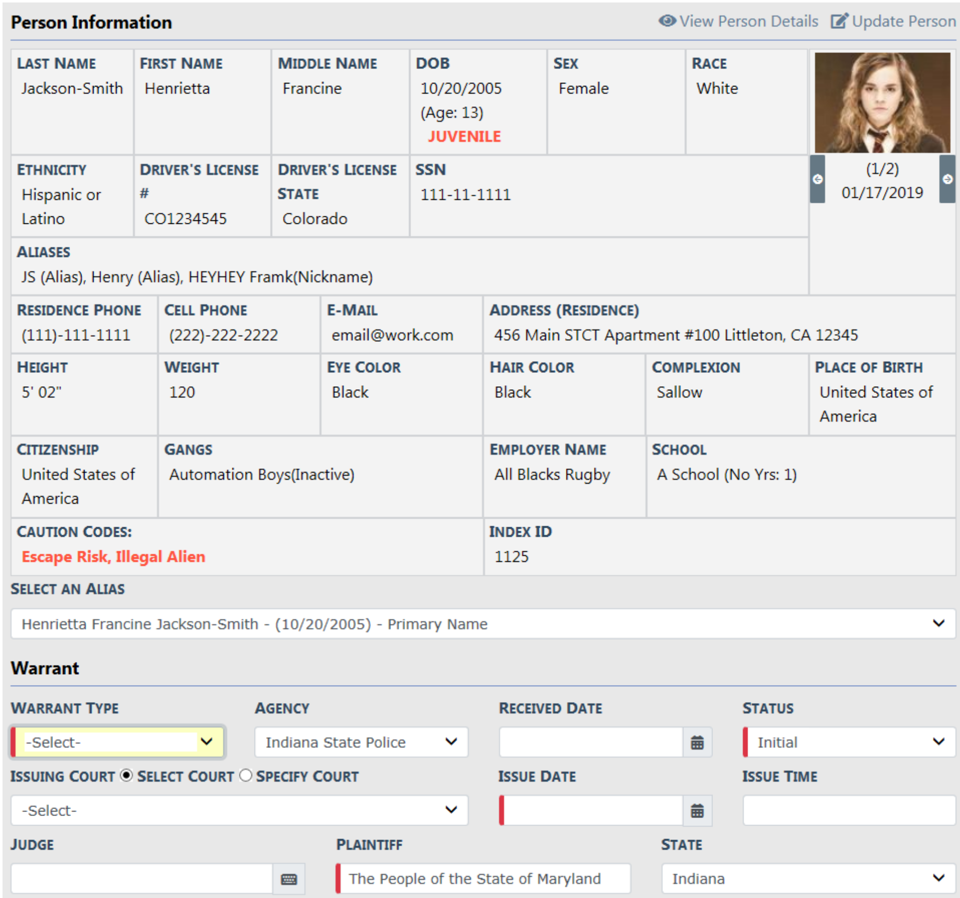


Either option will open the *Master Index Search* page. Enter the necessary criteria to search for the person for whom to apply the **Warrant**, click **Search**, then select the appropriate person record for the Warrant.

Note: If the person for whom you are searching does not exist, select the **Add Person** button on top of the *Search Results* page to add that person. Refer to "Adding Person" on page 100 for instructions. After you have added the person to the Master Index, you can then select the record to add a warrant for that person.

For more information on the *Master Index*, refer to "Master Indices" on page 83.

When you select the appropriate person record, the **Add Warrant** page opens. The person data populates from the *Master Person Index* record automatically.



You may *View Person Summary* data or *Update Person Details* by clicking on the links provided.

Complete all fields required by your Agency.

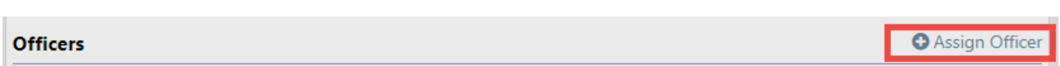
At least one Reference Number is required. Type the number in the field, choose the Reference Type and select the **Add** button. Add additional Reference Numbers and Types as needed.

Note: If configured, your agency may require a Judge on warrant creation.

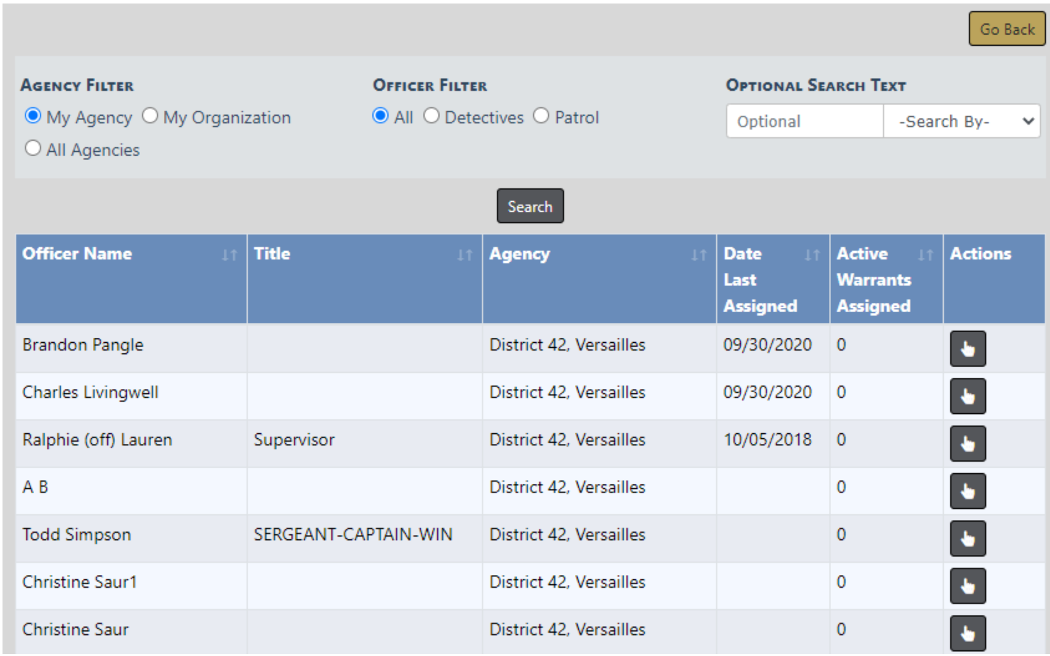
Check **Extraditable Offense** box if extraditable, and enter an **Extra Comment**, if applicable.

Click **Save** to open the *Edit Warrant* page.

Page down and assign officers, if applicable.



Select **Assign Officer** to open the officer dialog box and grid. You can assign officers inside or outside your agency.



Officer Name	Title	Agency	Date Last Assigned	Active Warrants Assigned	Actions
Brandon Pangle		District 42, Versailles	09/30/2020	0	
Charles Livingwell		District 42, Versailles	09/30/2020	0	
Ralphie (off) Lauren	Supervisor	District 42, Versailles	10/05/2018	0	
A B		District 42, Versailles		0	
Todd Simpson	SERGEANT-CAPTAIN-WIN	District 42, Versailles		0	
Christine Saur1		District 42, Versailles		0	
Christine Saur		District 42, Versailles		0	

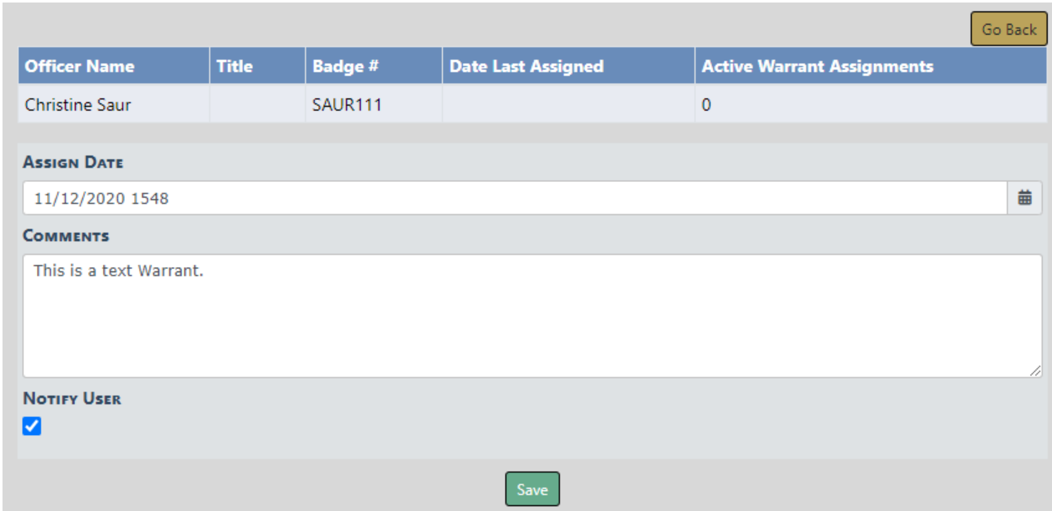
Select one **Agency Filter**. If you choose to filter *by My Organization* or *All Agencies*, a drop-down list appears of available agencies from which to choose.

Select one **Officer Filter**.

You can use the **Optional Search Text** fields filter by a specific officer name, badge number, or title.

Click the **Search** button to filter the results list based on all selections made above.

Select an officer from the list to open another dialog box with additional information.



Select the **Assign Date** if other than the default.

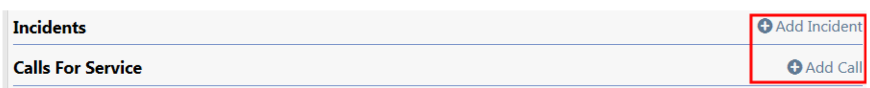
Enter **Comments**, if appropriate.

Check **Notify User** if you want to notify the user of the assignment.

Click **Save** to add the officer assignment to the Warrant.

Optionally, assign additional officers.

Add associated **Incidents** and **Calls For Service**, if applicable.



Add Incident

Select the **Add Incident** link to search for and select an existing incident to associate to the Warrant.

If the selected Incident has associated *Calls For Service*, a list of those Calls appear and you may choose whether or not to also associate the *Calls For Service* to the warrant.

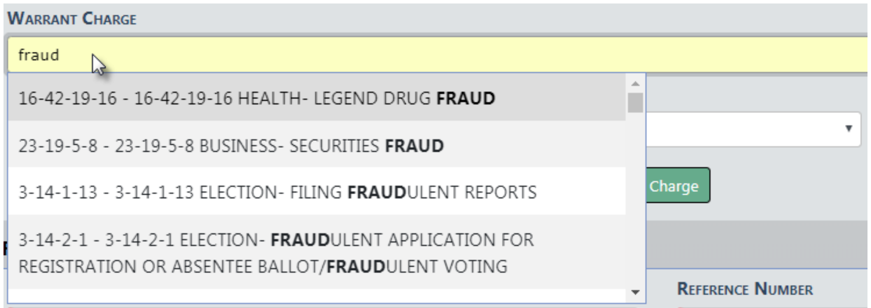
Add Call

Select the **Add Call** link to search for and select an existing Calls to associate to the Warrant.

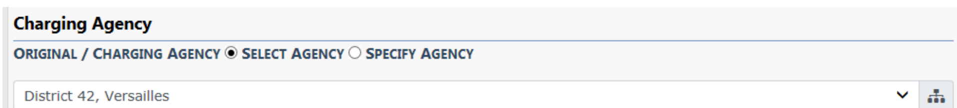
Complete the *Warrant Charge* section. Select the **Charge Category** and **Charge Class**, then the **Warrant Charge**.

Within the Warrant Charge field, search for arrest charges and statutes by entering numbers or text to display a list from which to choose.

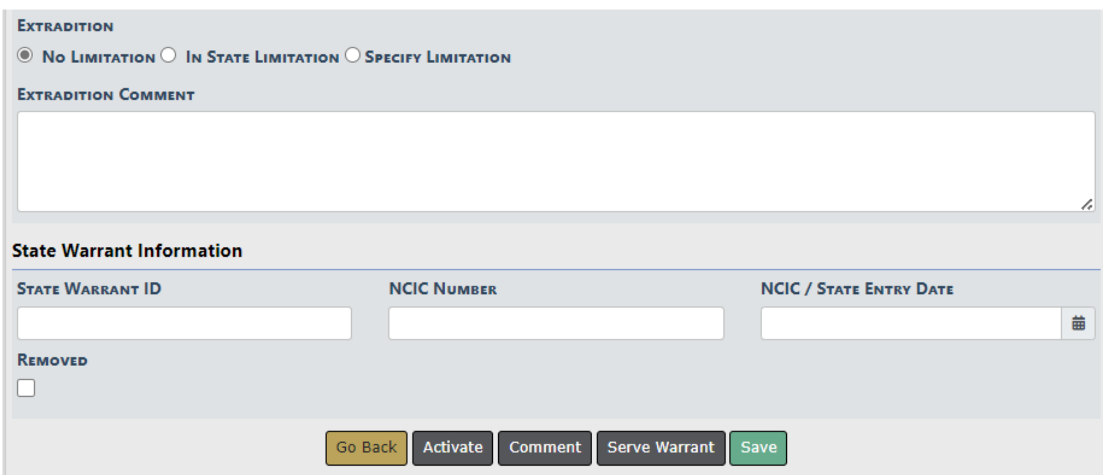
Note: The **Warrant Charge** displays a list based on data entered into the **Charge Category** and **Charge Class** fields.



Enter the **Charging Agency** section, if applicable.



Enter **Extradition** and **State Warrant** information (if applicable).

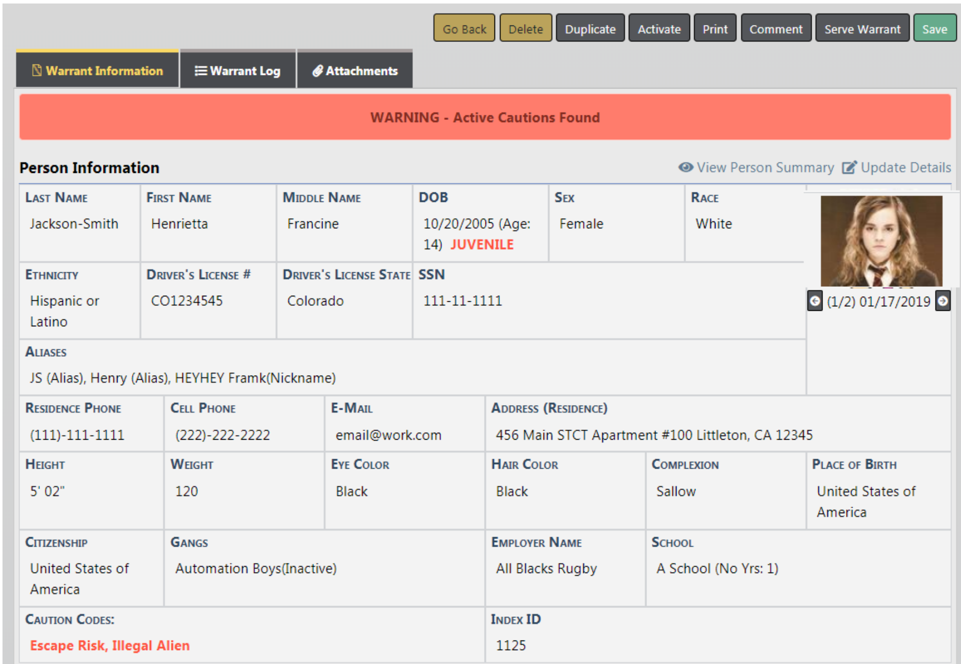


Once all applicable information has been added, click **Save** to add the Warrant.

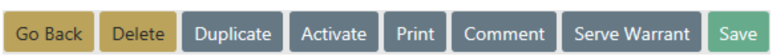
Edit Warrant

From the *Warrant Search Results* page, select the Edit icon  icon in the *Actions* column of the Warrant you want to edit. For more information on searching for a warrant, refer to "Warrant Search" on page 592.

The *Edit Warrant* page appears.



The *Edit Warrant* page contains up to eight action buttons on the top right of the window:



- **Go Back** returns to the previous page.
- **Delete** a warrant, refer to "Delete Warrant" on page 614.
- **Duplicate** a warrant, refer to "Duplicate Warrant" on page 604.
- **Activate** a warrant from initial status, refer to "Activate Warrant" on page 606.
- **Print** a warrant, refer to "Print Warrant Report" on page 614.
- Log a **Comment**, refer to "Warrant Log" on page 611.
- To **Serve Warrant**, refer to "Serve Warrant" on page 608.
- **Save** applies your updates to the database.

Note: The appearance of the action buttons are controlled by the warrant Status. For example, the Serve Warrant button does not appear when the warrant status is Served.

The *Edit Warrant* page contains three tabs:

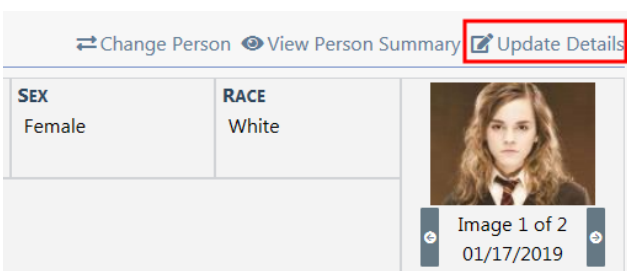
- For information on the Warrant Information tab, refer to "Warrant Information Tab" below.
- For information on the Warrant Log tab, refer to "Warrant Log Tab" on page 603.
- For information on the Attachments tab, refer to "Attachments Tab" on page 604.

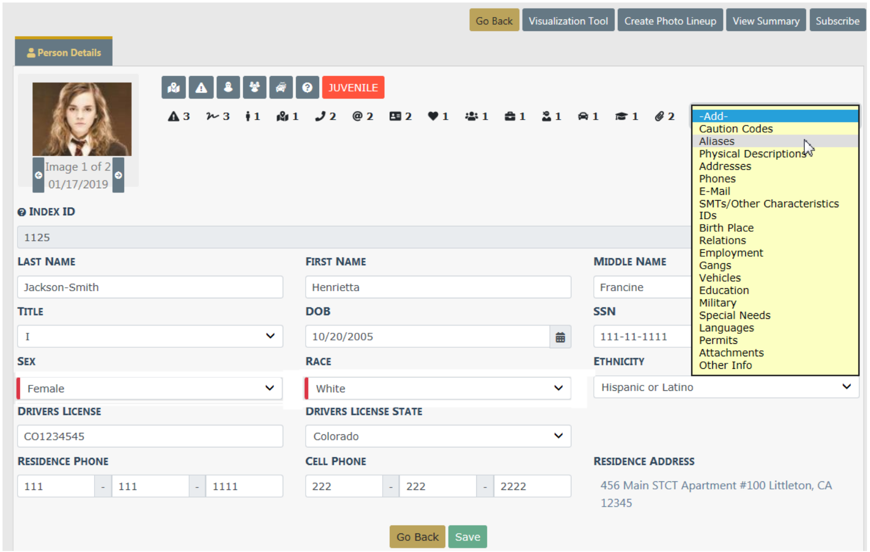
Warrant Information Tab

The **Edit Warrant** window opens to the Warrant Information tab by default. For information on **Warrant Log** refer to "Warrant Log" on page 611, and for information on **Warrant Attachments** tab refer to "Warrant Attachments" on page 613.

Choose or Add Alias Name

Select the down arrow to the right of the **Select an Alias** field to choose another name from the drop down list. If there are no names to choose from and you need to add an Alias, select the **Update Details** link in the upper right corner to open the *Person Details* page.

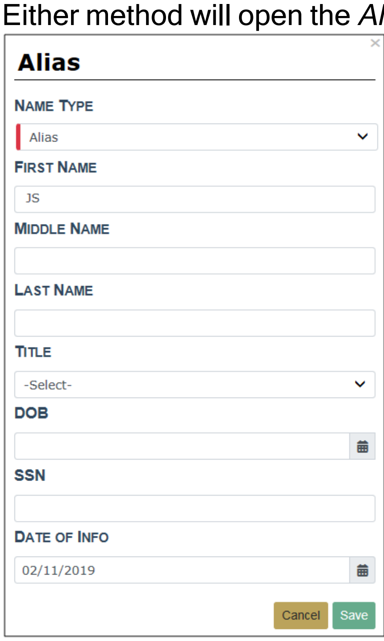




There are two ways to add an alias:

- Click into the **Add** field on the *Person Detail* window and select **Aliases** from the drop-down list.
- Or scroll down to the *Aliases* section of the *Person Detail* window and click **Add Alias**.

Either method will open the *Alias* window.



Complete the fields and select **Save**.

Click **Go Back** to return to the **Edit Warrant** window and page down to the **Select An Alias** section. The new Alias you entered now appears in the drop-down list.

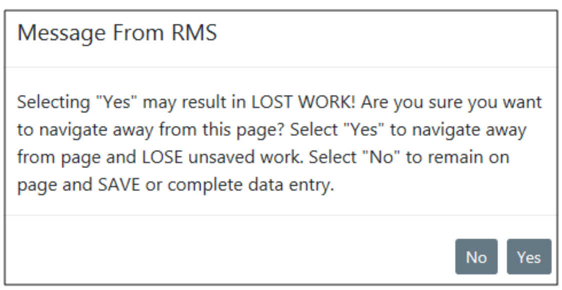
Page down on the *Edit Warrant* screen for other associated data, such as Service Addresses, Warrant Information, Incidents, Calls, Officers, Field Arrests, Charges, and Charging Agency information. You can view, update, add, or delete associated data if you have been given access to do so. For more information on the type of access that you have, see your administrator.

To add an associated record, click on the link that contains a **+** sign and a new window will open.

To return to the previous screen, select **Go Back**.

To add a comment about the warrant, select **Comment**.

If you have not selected **Save** and you have made some updates to the Warrant, an unsaved data warning message displays.



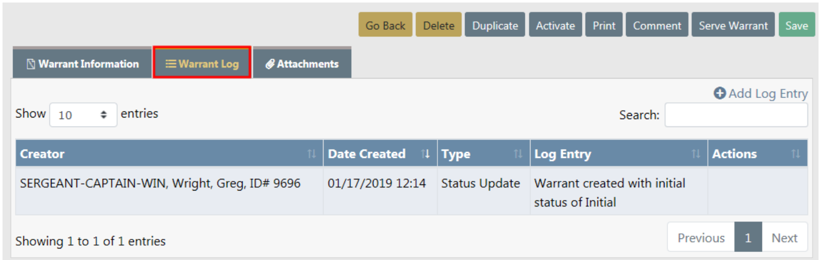
You may want to select **No**, select **Save** then continue with **Comment**.

The **Event Date** defaults to the current date and time. Enter any comments to the Warrant.

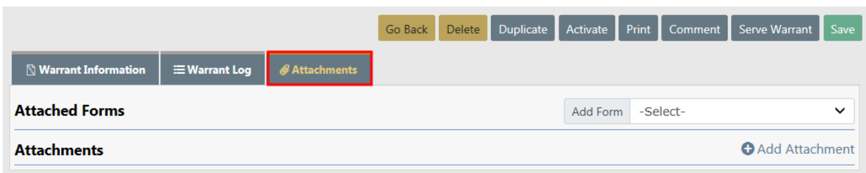
Warrant Log Tab

Select **Warrant Log** to view or add comments. This is also where you can view the date/time of each action taken.

Refer to "Warrant Log" on page 611 for more information.



Attachments Tab



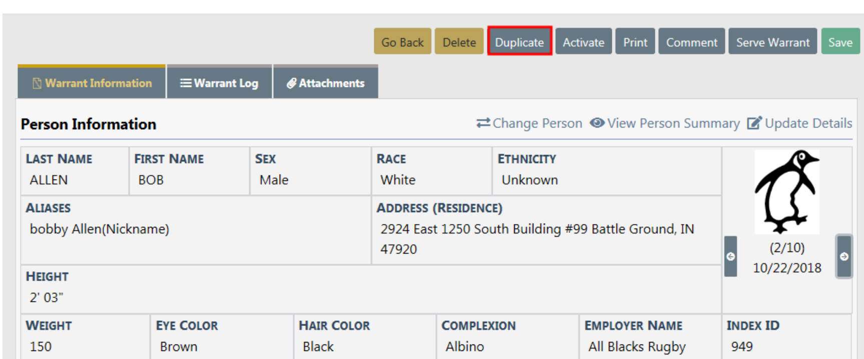
Refer to "Warrant Attachments" on page 613 for more information.

Duplicate Warrant

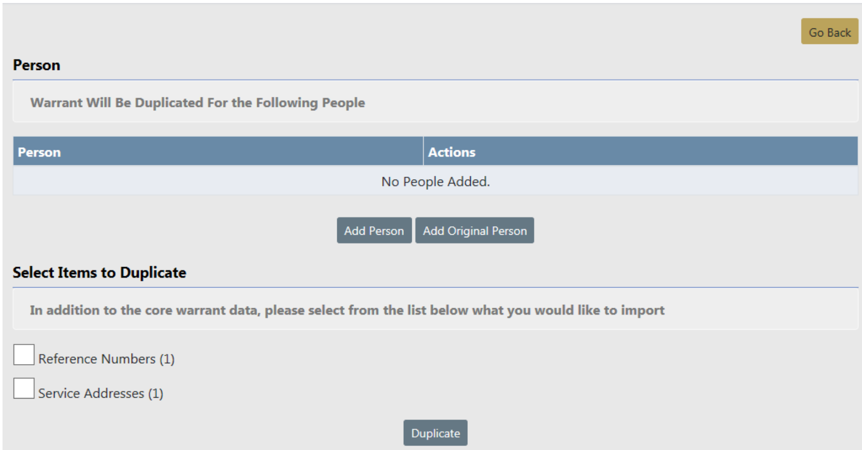
Users with proper permissions can duplicate warrants. For more information on permissions, refer to your agency administrator.

From the *Warrant Search Results* page, select the Edit icon icon in the *Actions* column of the Warrant you want to delete. For more information on searching for a warrant, refer to "Warrant Search" on page 592.

The *Edit Warrant* page appears.



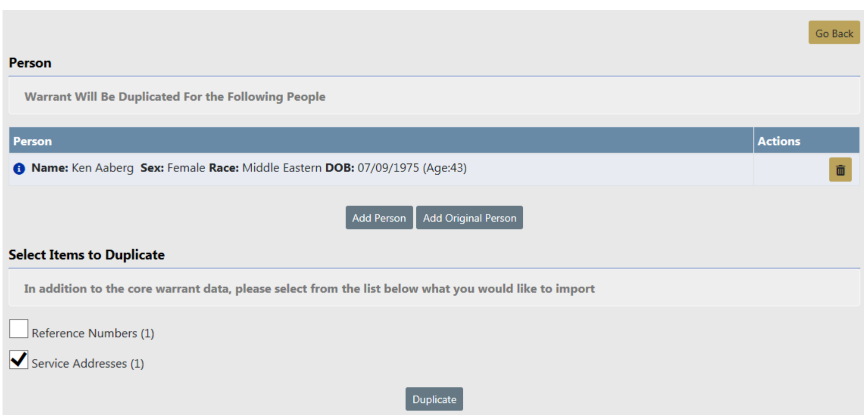
Click on the **Duplicate** button at the top of the page to select items to duplicate.



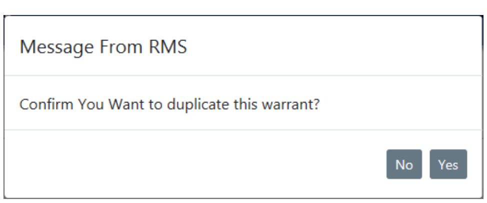
Click the **Add Original Person** button to add the person on the original warrant, or click **Add Person** to add a different person.

If you clicked **Add Person**, the person search window appears. Search for and select the person to add them to the duplicate warrant. Repeat as needed until all names have been added.

In addition to core warrant data, select the available options to duplicate.

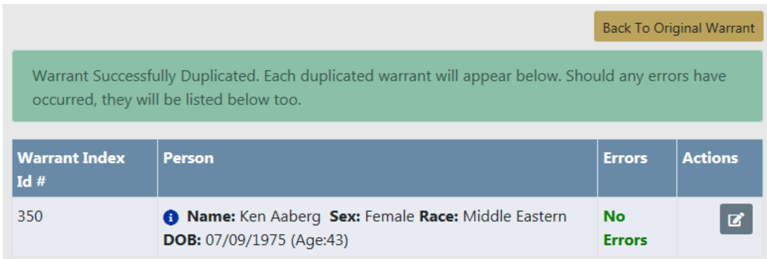


Click the **Duplicate** button to display a confirmation window.



Click **Yes** to duplicate, or click **No** to close the window without duplicating.

If you clicked **Yes**, a *Warrant Successfully Duplicated* window appears listing any errors that may have occurred.



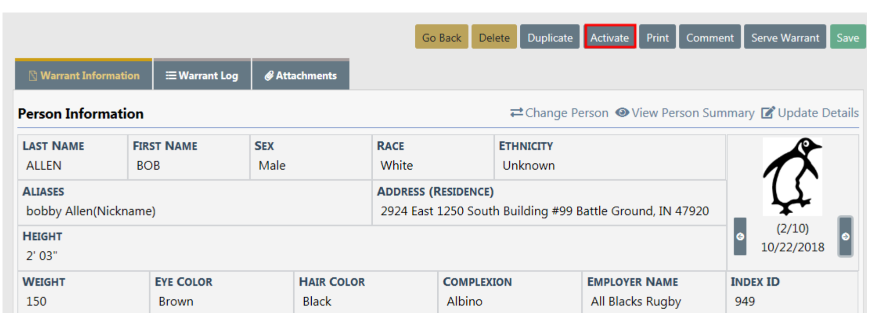
Click **Back to Original Warrant**, or click the edit icon in the actions column to edit the duplicated warrant.

Activate Warrant

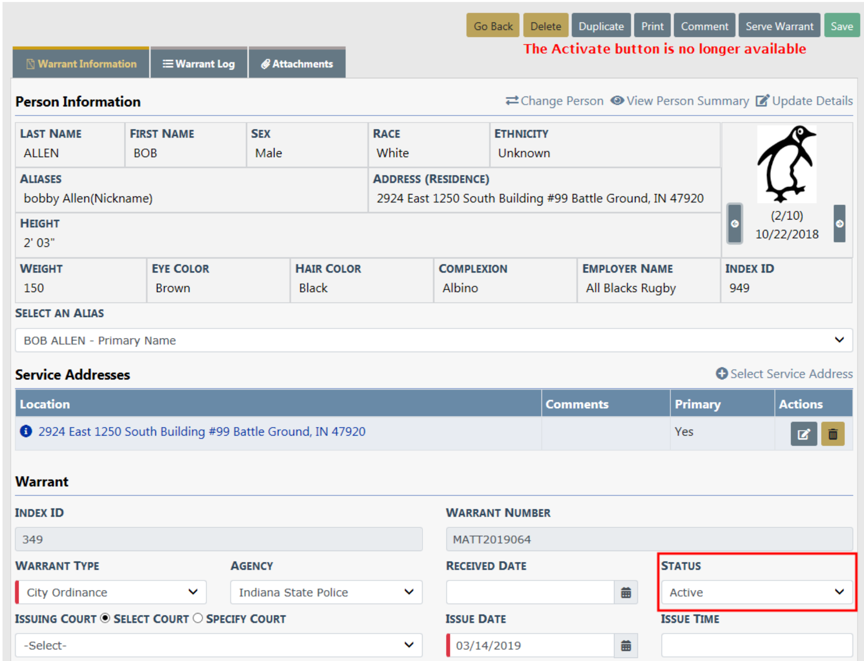
Users with proper permissions can activate warrants from an *Initial Status*. For more information on permissions, refer to your agency administrator.

From the *Warrant Search Results* page, select the Edit icon icon in the *Actions* column of the Warrant you want to delete. For more information on searching for a warrant, refer to "Warrant Search" on page 592.

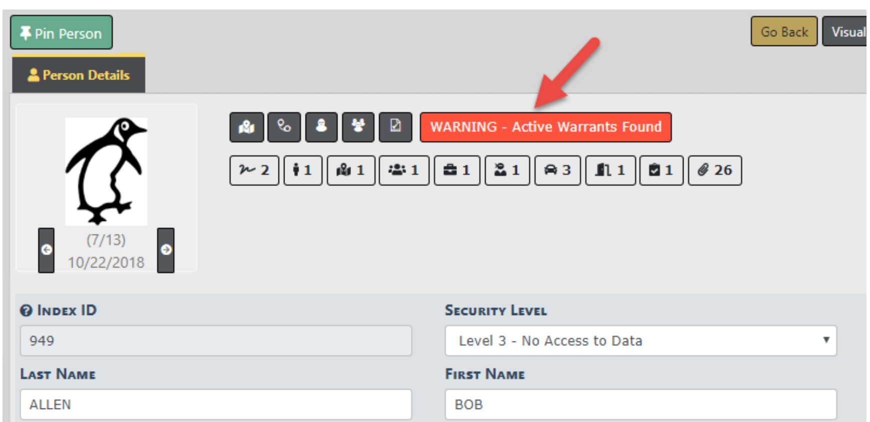
The *Edit Warrant* page appears. Click on the **Activate** button at the top of the page.



A *Warrant Successfully Activated and Updated* message briefly appears across the top of the page. The **Activate** button no longer appears at the top of the page, and the warrant **Status** changed from *Initial* to *Active*.



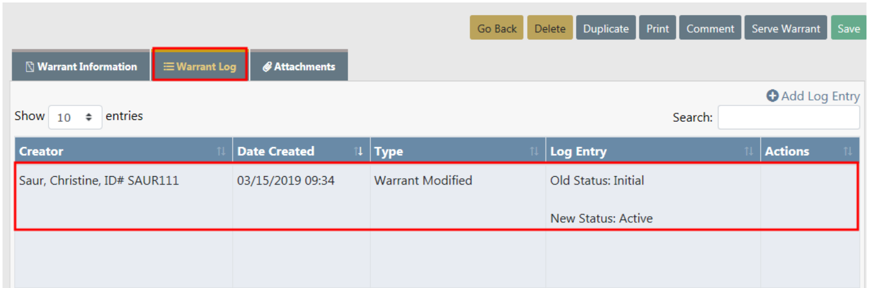
When the warrant status is *Active*, an automatic Caution Flag appears on the master person index record:



For more information on master index records, refer to "Master Indices Overview" on page 83.

Note: When the warrant **Status** changes from *Active*, the Caution Flag is removed from the master person index record automatically.

The change in status also posted to the Warrant Log. Click on the **Warrant Log** tab to view the entry. For more information about log entries, refer to "Warrant Log" on page 611.

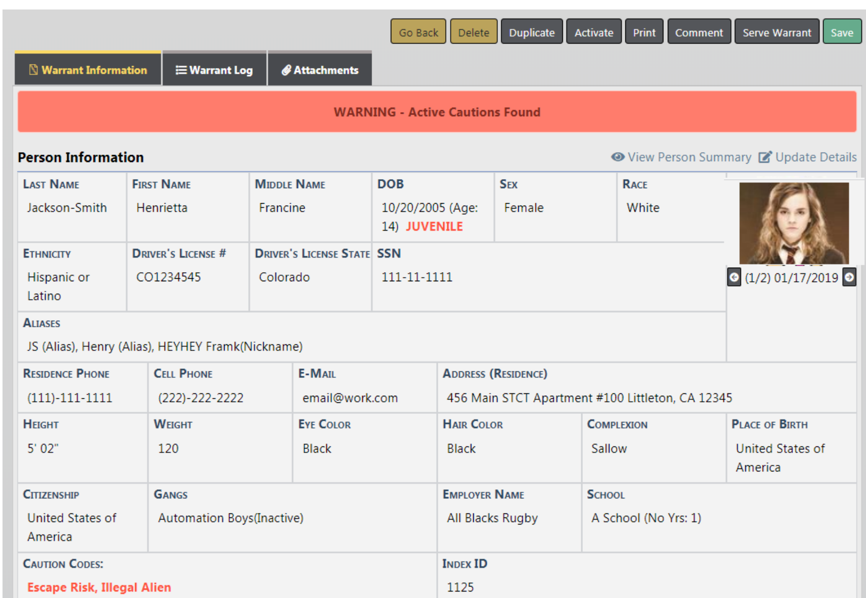


Apply other necessary updates to the warrant as needed, then click **Save**. For more information on editing the warrant, refer to "Edit Warrant" on page 599.

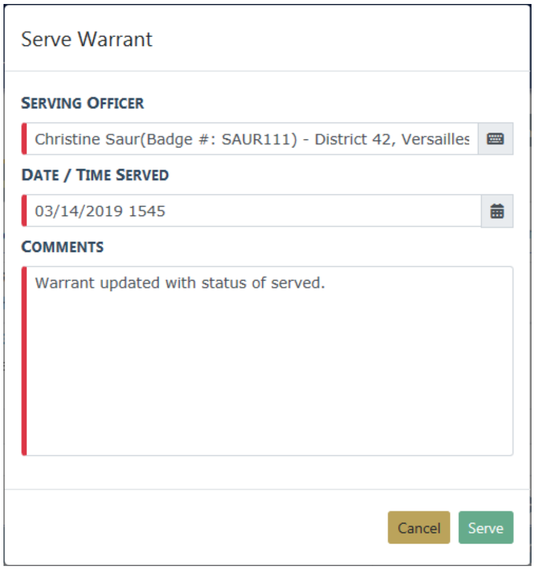
Serve Warrant

From the *Warrant Search Results* page, select the Edit icon icon in the *Actions* column of the Warrant you want to edit. For more information on searching for a warrant, refer to "Warrant Search" on page 592.

The *Edit Warrant* page appears.



From the *Edit Warrant* page select the **Serve Warrant** button at the top right or bottom of the page to display the *Serve Warrant* page.

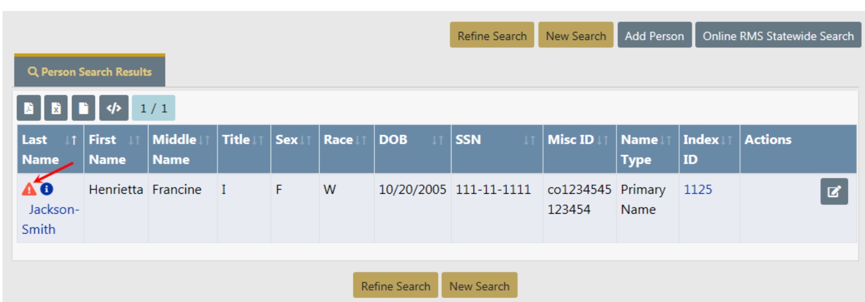


The **Date/Time Served** field defaults to the current date and time, and the **Comment** field defaults to *Warrant updated with status of served*. You can change these values as needed.

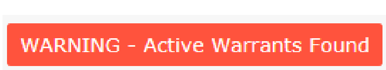
Once you have verified the information on the *Serve Warrant* page, select **Save** to save the record. The status of the Warrant is now *Served.*

When using *Master Indices Person Search*, there will be an red triangle icon to the left of the Last Name on the *Person Search Results* page when a person has an active Warrant.

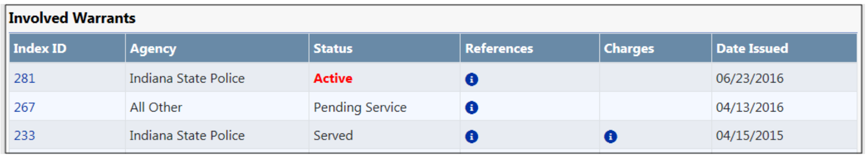
Note: For more information on Master Indices, refer to "Master Indices" on page 83.



From the *Person Search Results* page select the Edit icon  to open the *Edit Person* page. An *Active Warrants Found* message appears in red on the Person Details screen.



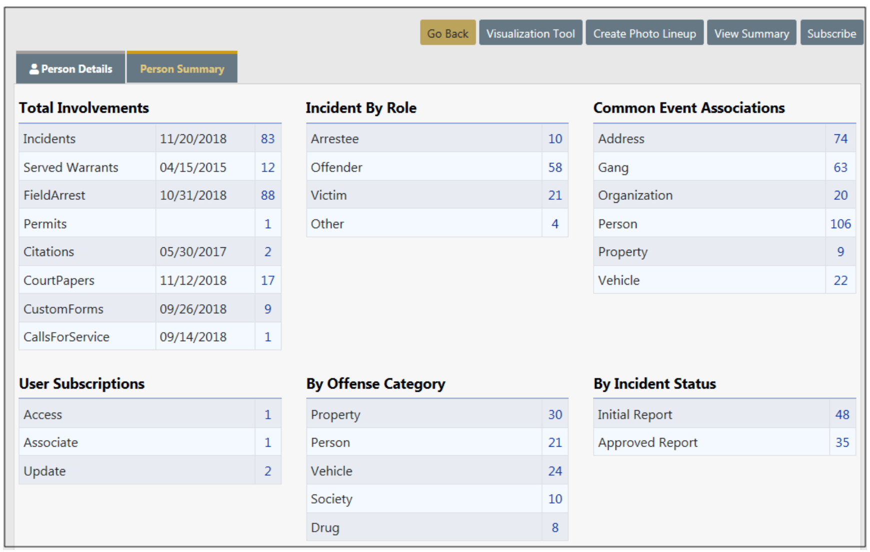
Click on the *Active Warrants Found* message to open the *Person Summary* tab to the **Involved Warrants** section that displays the active warrant in red.



Involved Warrants

Index ID	Agency	Status	References	Charges	Date Issued
281	Indiana State Police	Active	ⓘ		06/23/2016
267	All Other	Pending Service	ⓘ		04/13/2016
233	Indiana State Police	Served	ⓘ	ⓘ	04/15/2015

Note: You can also go directly to the **Involved Warrants** section from the **Total Involvements** summary section at the *Person Summary* tab. Click on the number to the right of the Warrants line item.



Total Involvements

Incidents	11/20/2018	83
Served Warrants	04/15/2015	12
FieldArrest	10/31/2018	88
Permits		1
Citations	05/30/2017	2
CourtPapers	11/12/2018	17
CustomForms	09/26/2018	9
CallsForService	09/14/2018	1

Incident By Role

Arrestee	10
Offender	58
Victim	21
Other	4

Common Event Associations

Address	74
Gang	63
Organization	20
Person	106
Property	9
Vehicle	22

User Subscriptions

Access	1
Associate	1
Update	2

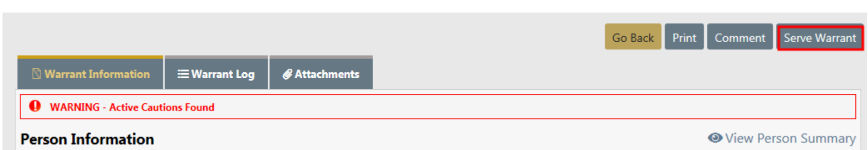
By Offense Category

Property	30
Person	21
Vehicle	24
Society	10
Drug	8

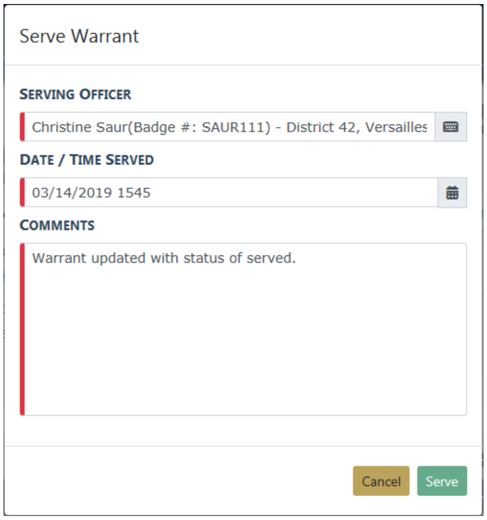
By Incident Status

Initial Report	48
Approved Report	35

Select the **Index ID** to the left of the *Active Warrant* to open the *View Warrant* screen.



Select the **Serve Warrant** button to open the *Serve Warrant* window.



Enter the **Serving Officer**. The **Date Served** fields default to the current date and time and the **Comments** field defaults to *Warrant updated with status of served*. You can change these values as needed.

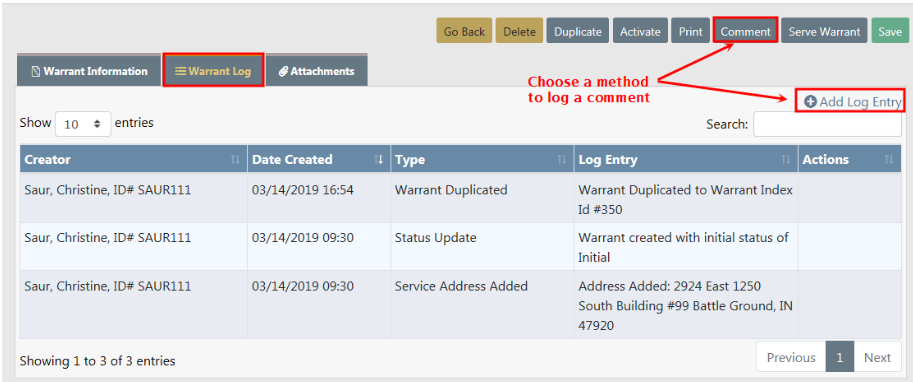
Once you have verified the information on the *Serve Warrant* page, select **Save** to save the record, close it, and return to the Warrant Information section of the *Edit Warrant* page, where the status now shows **Served**.

Warrant Log

Warrant activity is systematically logged for tracking purposes, and you have the ability to manually create a log entry.

A log entry is created automatically when the warrant is created, updated, deleted, etc. Each entry captures the user's name, date, type of change, and comments.

The **Warrant Log** tab is accessible through the *Edit Warrant* page. For more information, refer to "Edit Warrant" on page 599.

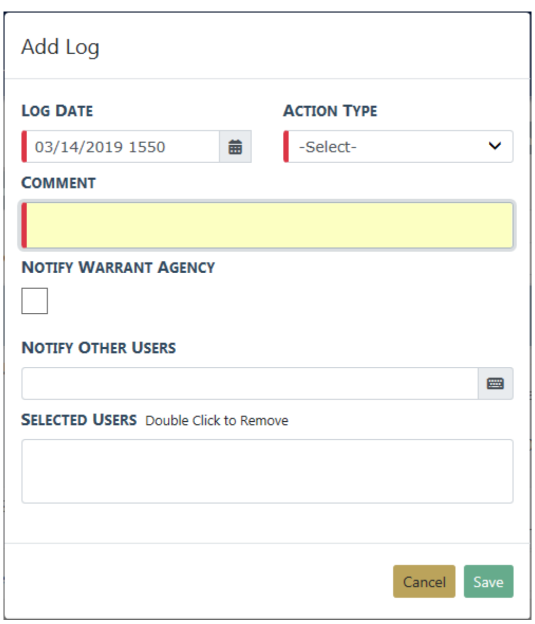


You can perform a **Search** for log entries containing a specific character string. Type the text in the **Search** text box on the upper right of the window to filter the results in the grid that matches the text you type.

You can log your own comments one of two ways:

- Click on the **Comment** action button on the top of the page.
- Or click on the **Add Log Entry** hyperlink.

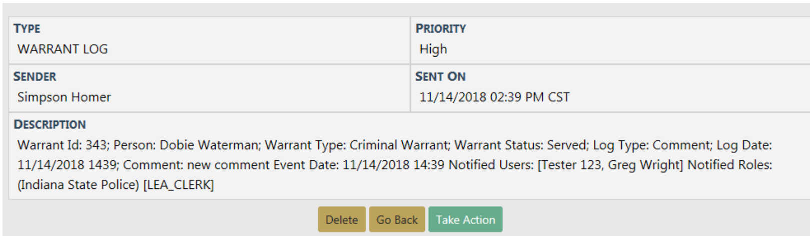
Click on the method of your choice to display the **Add Log** form. Select the *Notify Warrant Agency* button to notify the Warrant Agency, or select other individual users or assigned officers.



The **Log Date** defaults to the current date and time but can be changed.

Click **Save** to post the log.

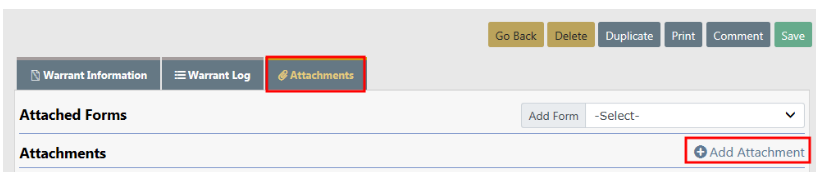
To provide real-time awareness, an email is sent to the identified recipients notifying them of the new **Warrant Log**, and the officers and selected users receive an Online RMS *Notification*. For more information on *Notifications* refer to "Notifications" on page 25.



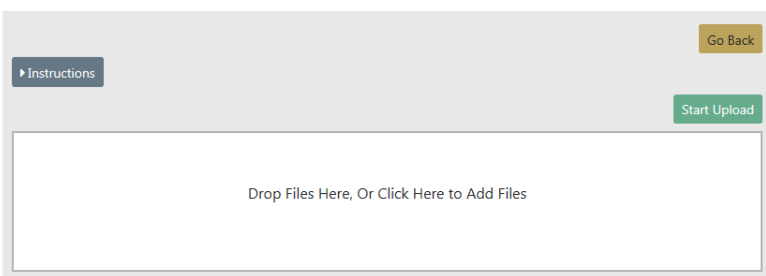
Warrant Attachments

There may be times when it is necessary to attach a copy of the *Warrant* or any other documentation to the warrant within Online RMS.

Access the **Attachments** tab from the *Edit Warrant* page.



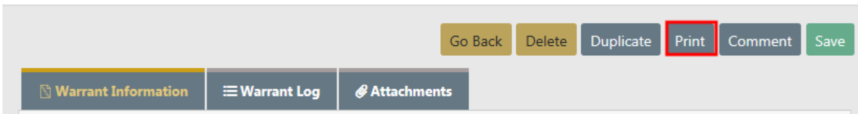
Select the **Add Attachments** link to open the *Add Attachment* page.



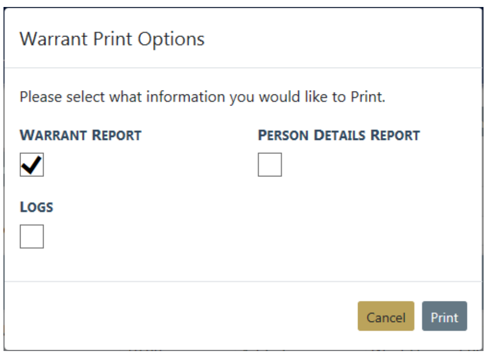
For details on adding Attachments refer to "Add Attachments" on page 69.

Print Warrant Report

Warrant Reports are printed from the *View Warrant* or *Edit Warrant* page by clicking on the **Print** button at the top of the page. You also have the option to select whether or not to include *PDF Attachments* and *Warrant Logs* in the **Warrant Report**.



1. Check all options that apply.



2. Click **Print**.

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

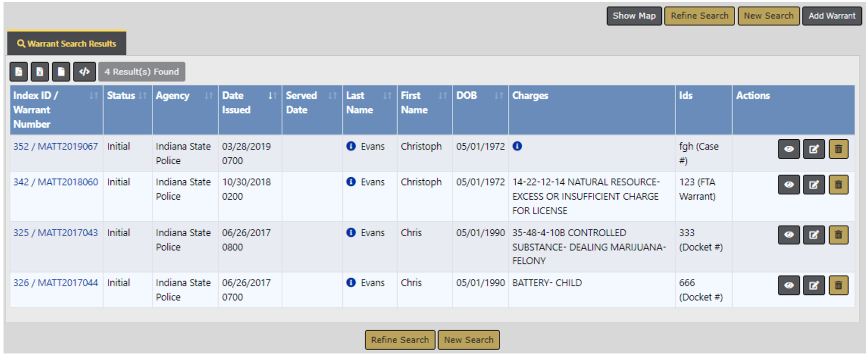
Note: If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

Delete Warrant

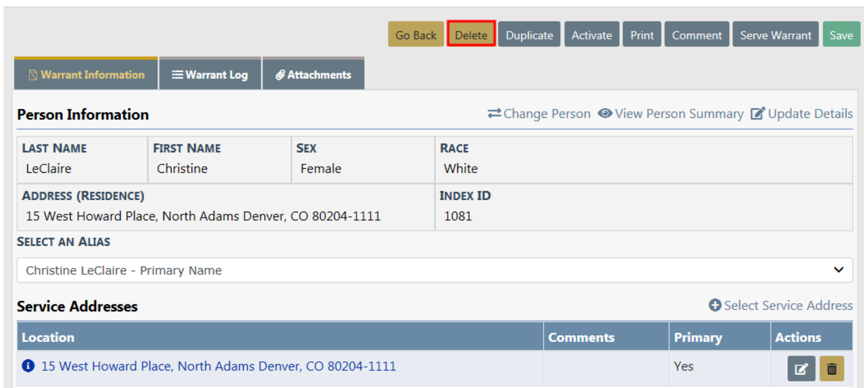
Users with proper permissions can delete warrants. For more information on permissions, refer to your agency administrator.

There are two ways to delete a warrant:

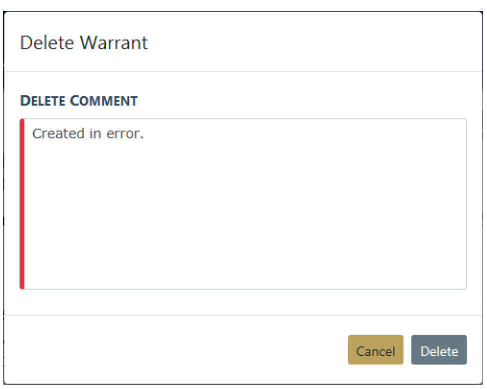
- From the *Warrant Search Results* page, click the **Delete** icon  in the *Actions* column. For more information on searching for a warrant, refer to "Warrant Search" on page 592.



- From the *Edit Warrant* page, click on the **Delete** button at the top of the page. For more information on editing a warrant, refer to "Edit Warrant" on page 599.



Whichever method you use, a *Delete Warrant* window appears.

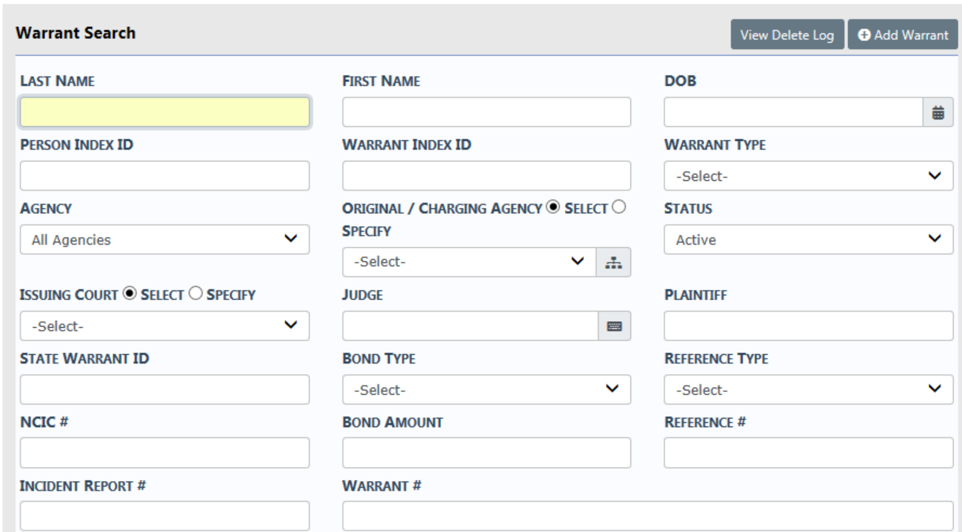


Enter your **Delete Comment** then click the **Delete** button.

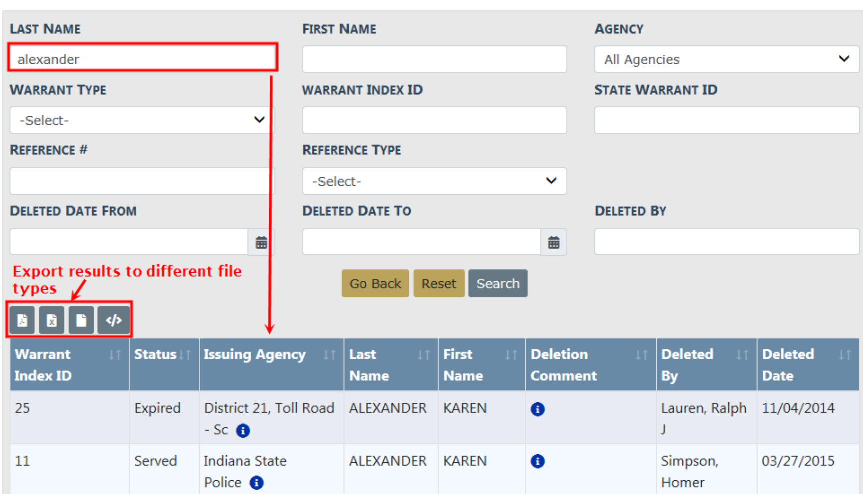
A *Warrant Successfully Deleted* message briefly appears across the top of the window, and a warrant delete log entry is created automatically with the deleted date, the user who deleted the warrant, comments, and other information. For instructions on accessing the Warrant Delete Log, refer to "View Warrant Delete Log" on the next page.

View Warrant Delete Log

The Warrant Delete Log is accessed through the *Warrant Search* page. Click on the **View Delete Log** hyperlink to open the *Warrant Delete Search* page. For more information on how to access the *Warrant Search* page, refer to "Warrant Search" on page 592.



Enter search criteria then click **Search** to display a results list. This is useful when searching for a specific person, warrant type, etc., as the delete log can get quite lengthy over time. To display all entries, click **Search** without entering criteria.



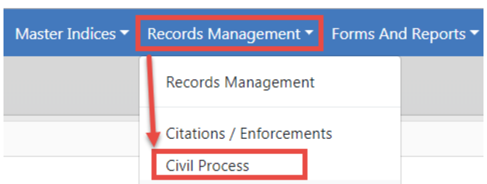
You can export the results to PDF, Excel, CSV, or XML formats by clicking on one of the icons above the Warrant Index ID column. Hover your mouse over the icon to view the file format.

Chapter 30. Civil Process

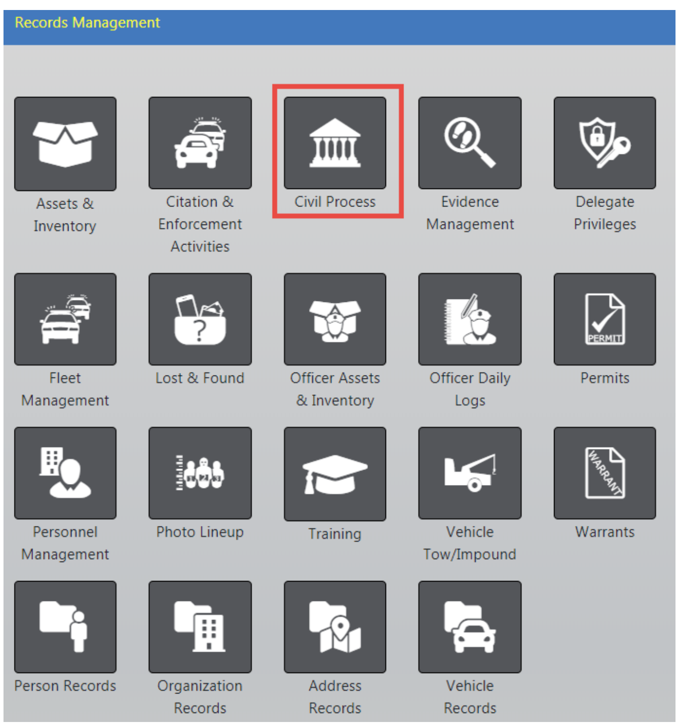
Overview

The Civil Process application is found within the *Records Management* section. Click on Records Management You can hover over the tab and drag and drop or you can hard click on the tab and screen will open as it looks below.

To access the **Civil Process** module, select the **Civil Process** option from the *Records Management* drop-down menu.



Or, select the **Civil Process** Icon/link from the *Records Management* pages.



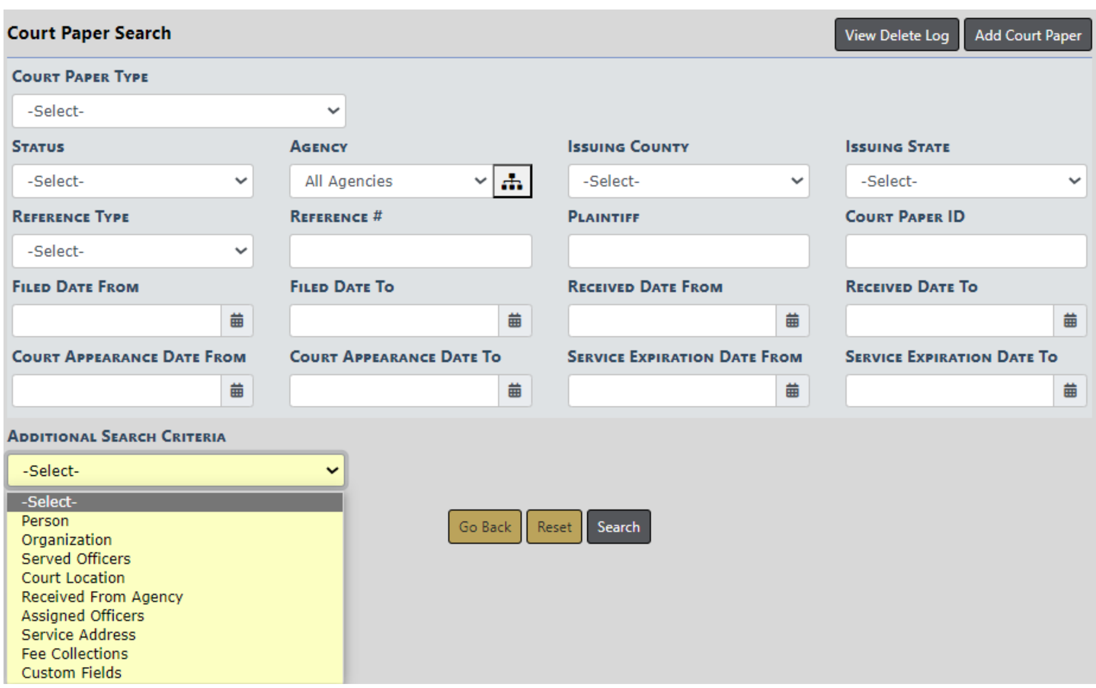
When you click on **Civil Process** you are first taken to a *Search* page section within **Civil Process**. Searching this module is done similar to other areas within Online RMS.

> **Note**: The terms *Court Paper* and *Civil Progress* used throughout this chapter are synonymous with each other.

Court Paper

Search

The search feature allows you to search upon any of the standard fields and additional criteria fields to generate the information you are seeking. Just like with our other search areas those results can then be exported out as reports to manage the data.



Click into the **Additional Search Criteria** field to search on other fields. This is where you are able to search by Person, organization, officer, officers to be served, etc. The more information you provide in the search, the narrower the search results.

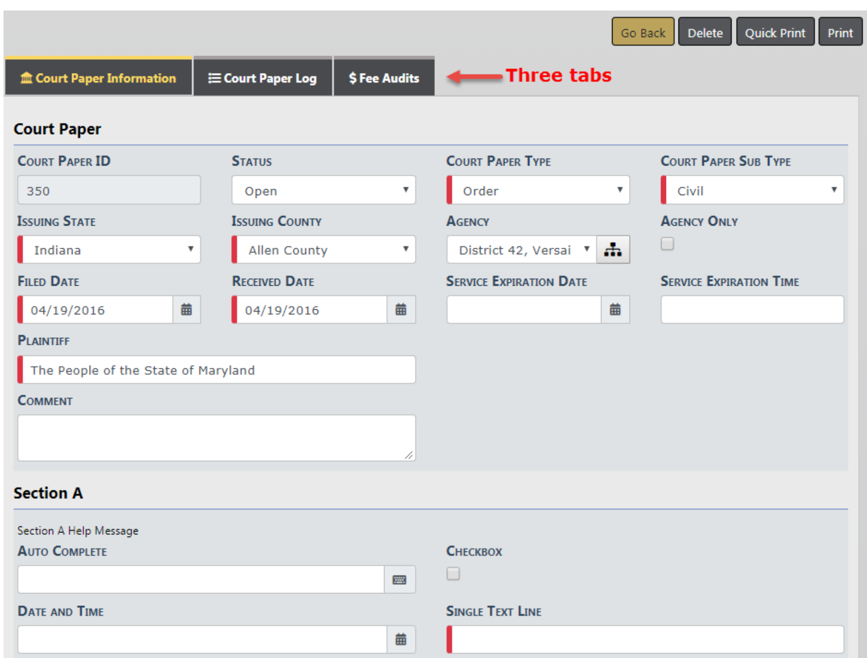
The results of the search criteria from above are displayed below with all matching data.

From this screen you can now access the record you want by using the **Edit** icon  on the right to make changes or update information. Click on the **Court Paper ID#** to enter the **View** mode for that particular court paper.

In **View** mode, you can see information about the paper as it was entered, add and view entries made in the log for service of the paper, and track incurred fees. This allows for tracking of changes, updates and service attempts.

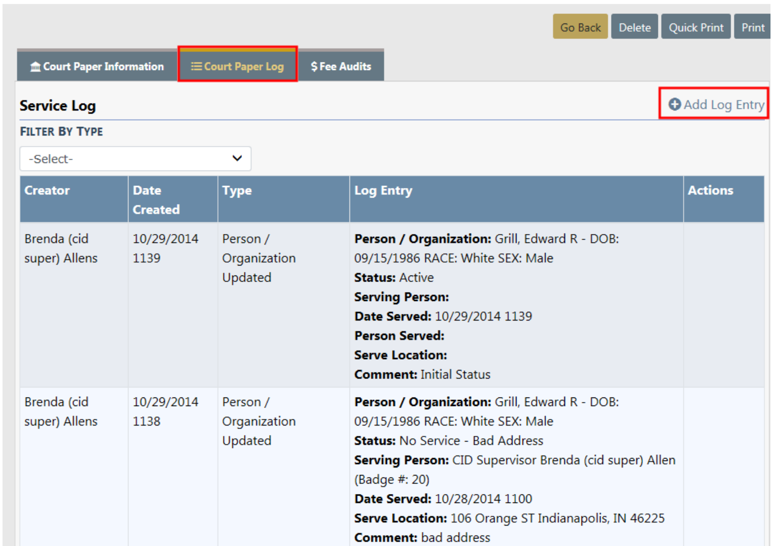
There are three tabs: *Court Paper Information*, *Court Paper Log*, and *$ Fee Audits*.

The *Court Paper Information* tab opens by default.



The *Court Paper Log* tab contains a log of updates made to the Court Paper, and the officer can manually log the attempts to serve the paper. Hover over the bubble to display the notes the officer made.

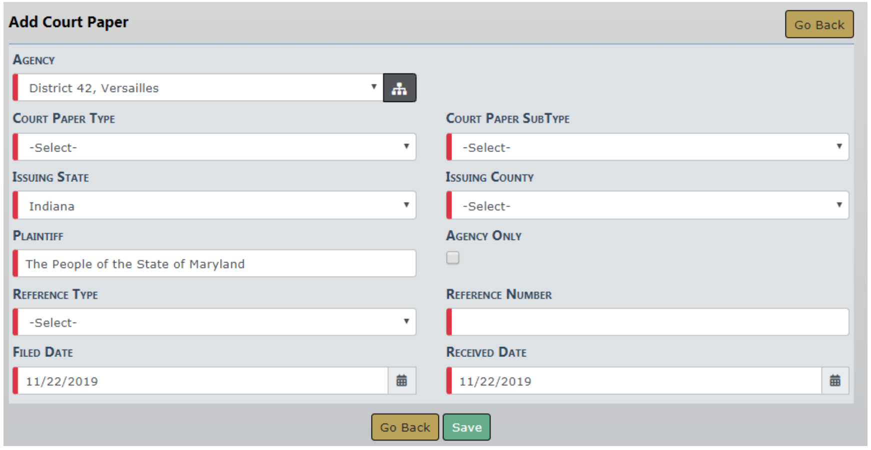
Note: The **Add Log Entry** hyperlink appears while in *Edit* mode, and not while in *View* mode.



The *$ Fee Audits* tab tracks incurred fees.

Add

To create a new Court Paper select the **Add Court Paper** button to open the *Add Court Paper* screen.

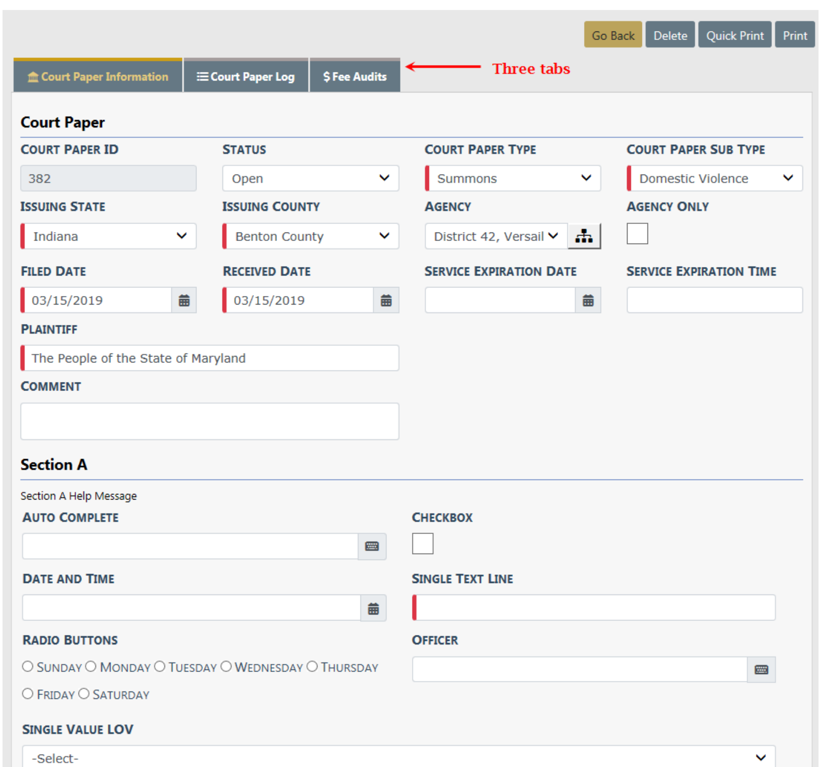


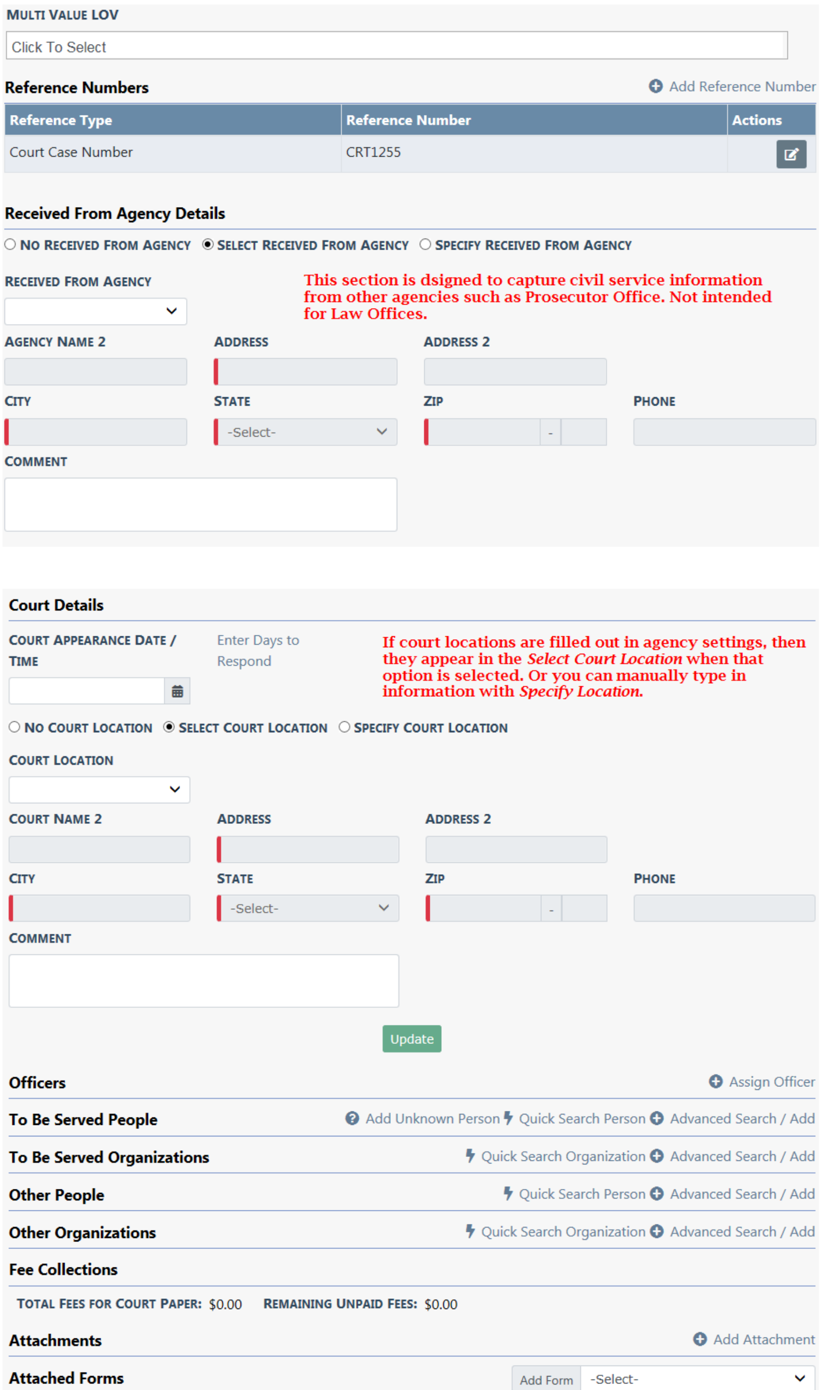
Select from the drop-down lists and enter other necessary information.

Click the **Save** button to create the record and display the *Edit Court Paper* screen.

Edit Court Paper

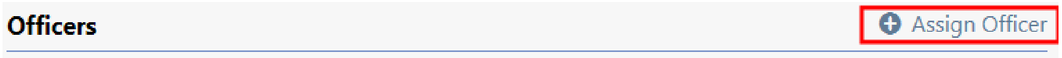
The *Edit Court Paper* screen allows you to continue entering information section by section. Data entered in the *Add Court Paper* screen auto populates into the fields within this screen.



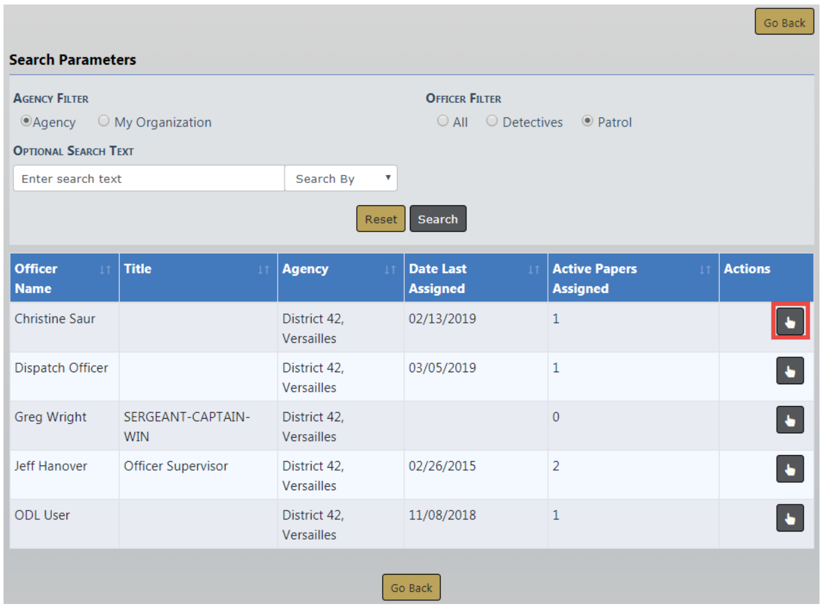


The next section is the Officer section of the module. This can be utilized if you want to assign the paper to a specific Officer. The officer receives notification of the assignment and it appears in their *Recent Activities*.

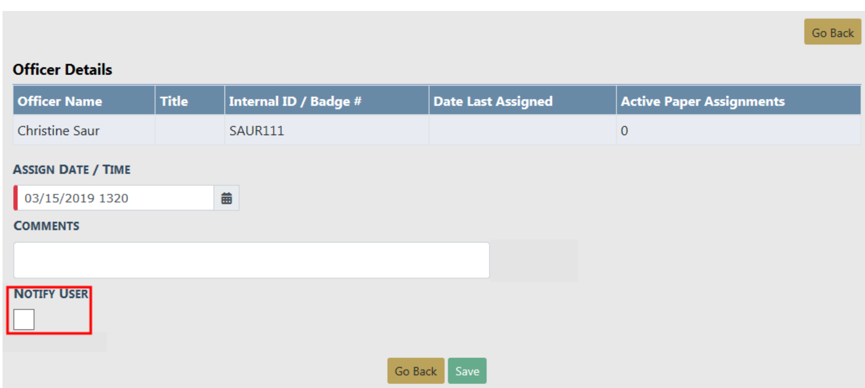
To add Officer to paper, click the **Assign Officer** link.



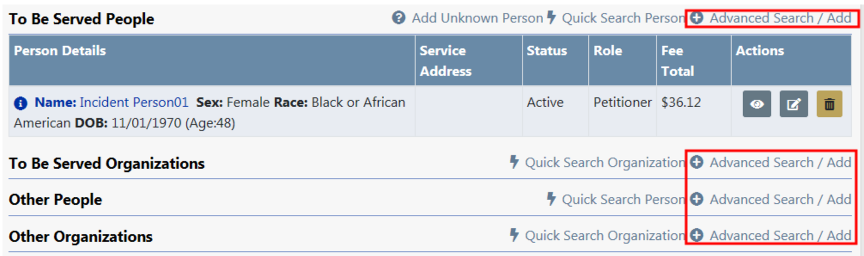
The a list of officers appear. Click the Select icon to make your selection. You can also apply filters to shorten the list from which to choose.



Officer Details window opens. This is where you can leave comments to officer and also check to notify officer.



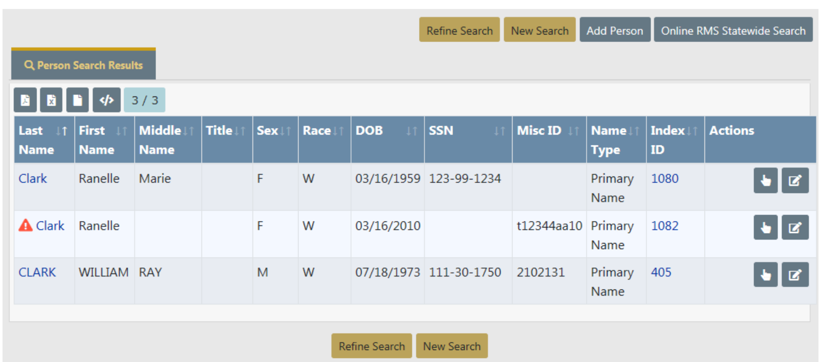
Next two sections are about the Persons/Organizations to be served and the Other Persons/Organizations involved with the paper. Caliber Public Safety recommends using the **Advanced Search/Add** link to search *Master Index* data. For more information on *Master Index*, refer to "Master Indices" on page 83.



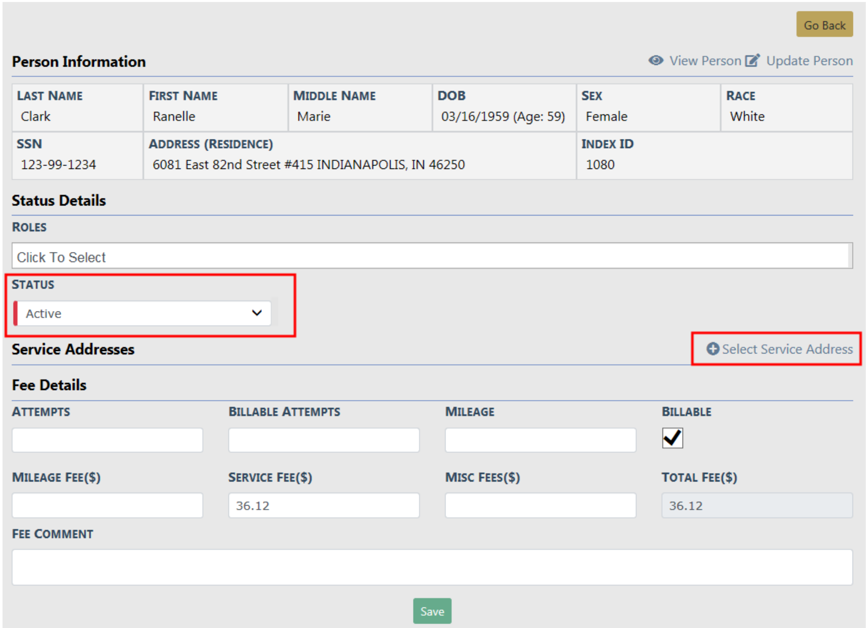
- The **Add Unknown Person** link captures service where evictions might be involved, or total number of people to be served is not known. Agencies have different uses for this.

- The *Other People/Organizations* section captures the non-serveable persons or organizations of the paper. Typical usage is for the payor, and where garnishments and fees are handled.

Perform search on the person /organization that you would like serve. Select the person that is to be served, if exists, by the **Index I.D**. or by using the **Select** icon in the *Actions* column. Add new person if not in the *Master Index*. For more information on adding a person refer to "Adding Person" on page 100 in the *Master Indices* section.



Half way down is a drop-down that lets you set the **Status** for the person. This is what triggers your *Master Name Index* to notify officers of an Active Paper when a master name search is done. Also, click on the **Select Service Address** link to select the address that ties to the selected person.

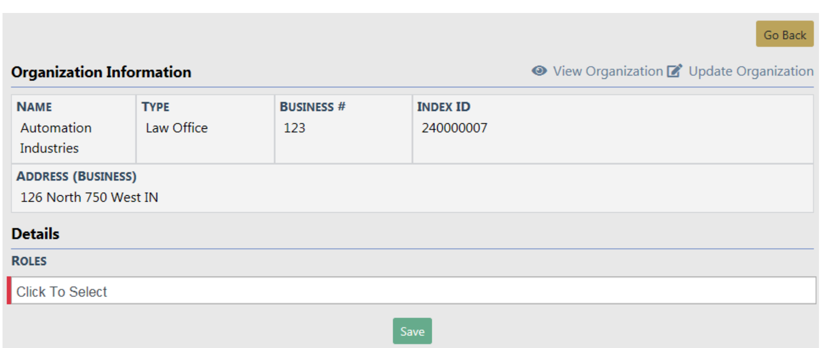


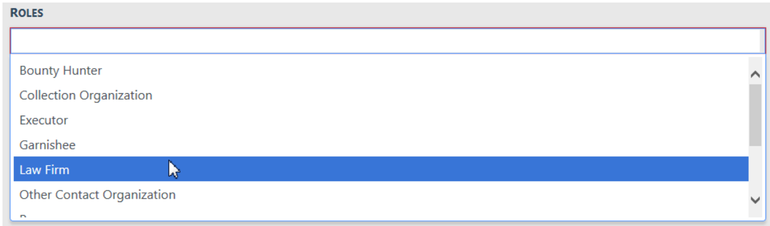
Fee details are discussed little more in detail later. From the officer serving the paper they typically only have access to the non gray boxes and the comment section. Attempts also can be captured in the log with a note of mileage. The use of this would be a business process determine by agency of when and whom applies Fee details.

Click **Save** to save the person/organization record to the Court Paper.

Adding **Other Person/Organization** to paper is done by some advanced search/add method. After selecting from *Master Index* or adding new you will be taken to this page. For more information on *Master Index*, refer to "Master Indices" on page 83.

Note: The Fee collection only shows after the **Payor Role** is selected. You can have more that one role assigned.

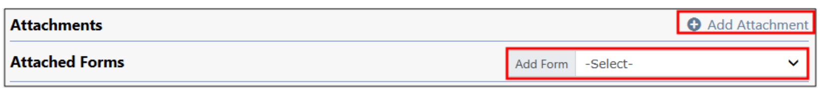




- You can select more than one role. The *Payor* role triggers the *Fee Collections* section that keeps track of fees owed and is searchable.

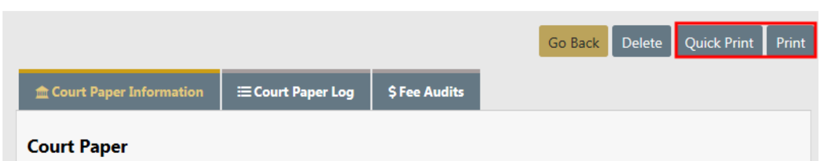
Click **Save** to save the other person/organization record to the Court Paper.

The last sections are the *Attachments* and *Forms* sections. You can add any relevant attachments to the paper or if your agency has a custom form associated with civil process it would be selectable here as well.

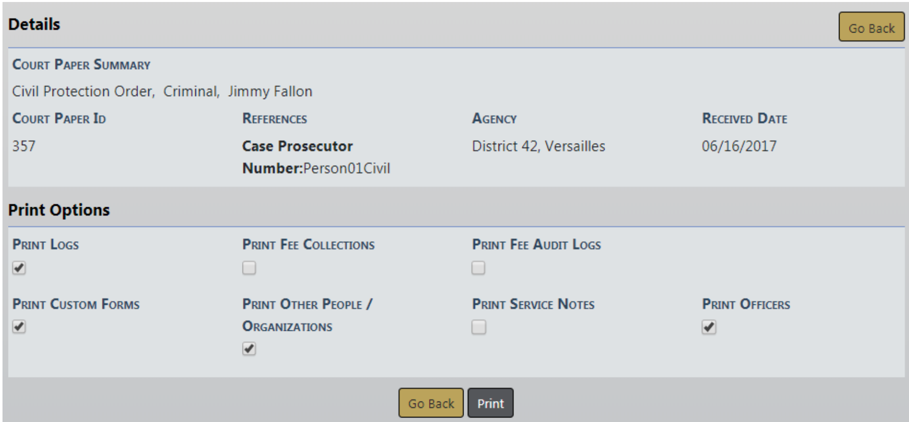


Print Court Paper

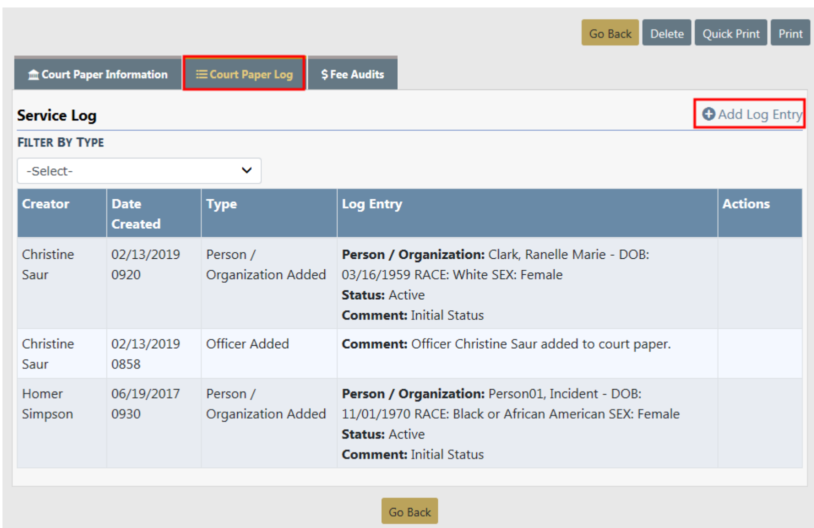
From the *View Court Paper* and *Edit Court Paper* screens there are **Print** and **Quick Print** options on the top right of the screen to print a cover page for your civil/court paper.



The **Print** button gives you selectable options to include on your cover sheet, whereas, **Quick Print** does not.

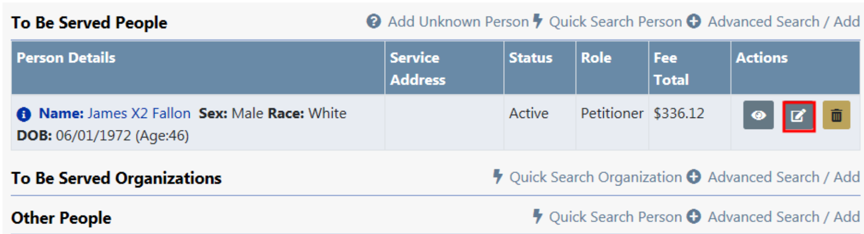


System creates system log entries automatically. You can also click the **Add Log Entry** link to manually enter log actions.

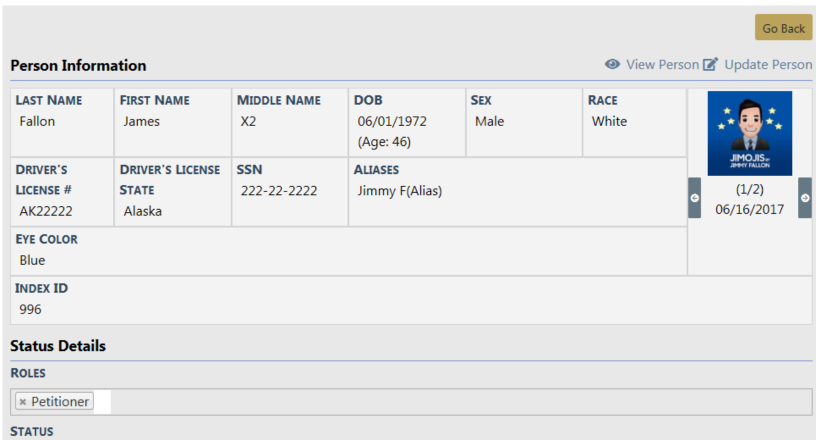


Add Mileage/Attempts and Fees

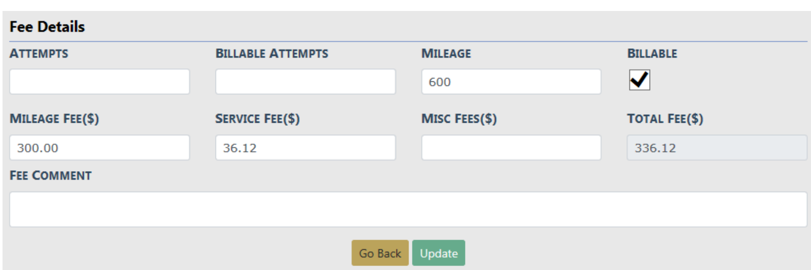
While on the Court Paper, page down to the **To Be Served People** section. . The permissions to manage Fee details is given by default to both the *Agency Admin Role* and *LEA Clerk Management Role*; all other users only have ability to edit the **Attempts** and **Mileage** boxes.



Click on the **Edit** icon  to open the court paper. The *Person Information* displays.

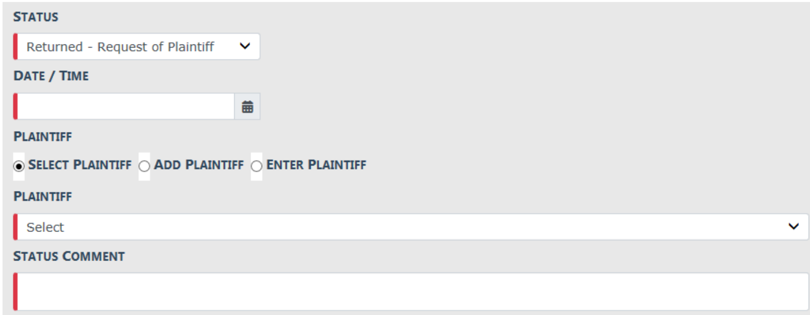


At the bottom of the page is a section where you fill in the information in regards to tracking the service of the paper. You can notate attempts, the mileage for the attempts, and the fee's to be collected in regards to the court paper.



Status Details

The **Status** of the paper would be changed to show the final status that the paper would have. Choices would be in status details section in the following screen shot to capture a served-executed paper service.



Select the **Update** button to save your changes.

Once you are finished with paper the *Fee Collections* section is completed. You now want to be able to collect fees and keep track of what has been paid on and what might still be owed.

Click the **Edit** icon on the *Organization Details* for the Payor and then click the **Add** link. This will create another entry point for receiving remainder fees as they come in.

Fee Audits also display on the *Edit Court Paper* screen.

You can click the **Print** or Quick button to generate a *Court Paper Report*. For details on printing the report, refer to "Print Court Paper" on page 626.

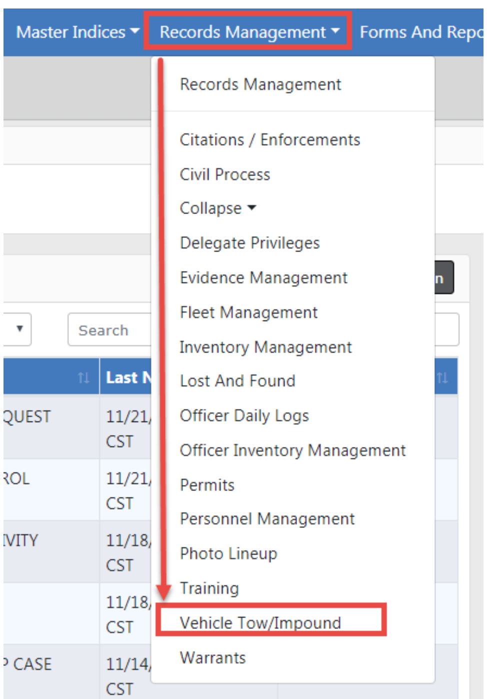
Chapter 31. Vehicle Tow/Impound

Overview

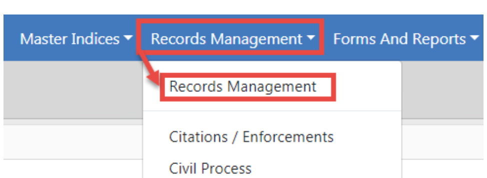
The **Vehicle Tow/Impound** module is found under the *Records Management* menu on the *Home Page*

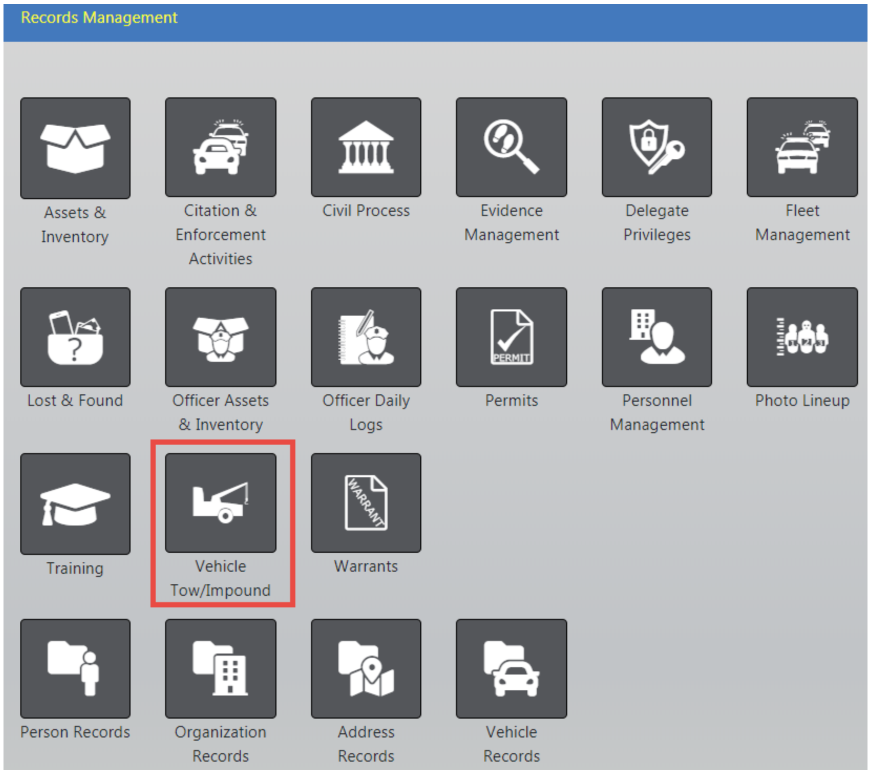
You can access this module two ways:

- Click *Records Management* on the top navigation bar, then click **Vehicle Tow/Impound**.

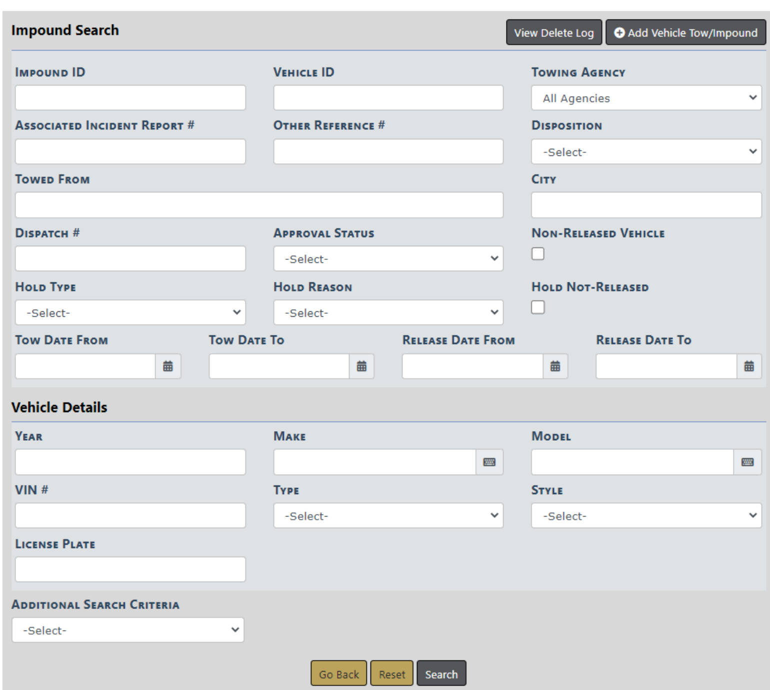


- Click *Records Management* on the top navigation bar, click on the Records Management option that appears in the drop-down list, then click the **Vehicle Tow/Impound** link.





Either method opens the *Vehicle Tow/Impound Search* screen. After selecting the icon you are taken to *Search* application. You can either view the delete log, add a new record, or search the system for data that matches specific criteria.



Click **Go Back** to return to the previous screen, click **Reset** to start a new search, or click the **Search** button to search for records containing the entered criteria.

Note: Clicking the **Quick Impound** button will display the Add Vehicle Tow/Impound screen, with the vehicle already selected. Clicking **Save & Select** will display the Incident Edit screen with the newly created impound associated and ready to be edited.

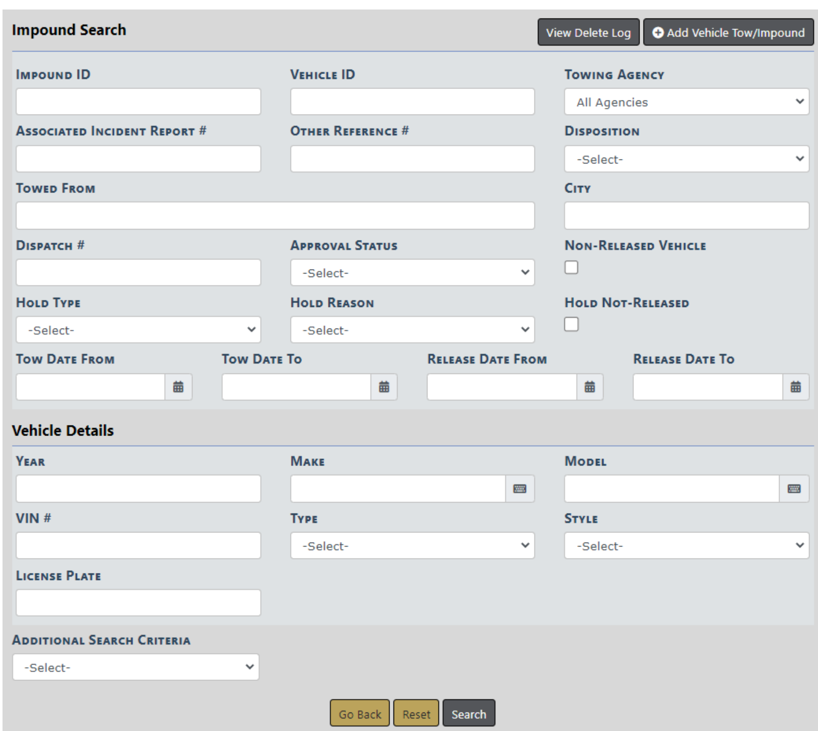
For information on viewing the delete log refer to "Logs" on page 648.

For information on adding a new tow/impound record refer to "Enter New Vehicle Tow" on page 636.

For information on searching for existing records refer to "Search Vehicle Tow/Impound" below.

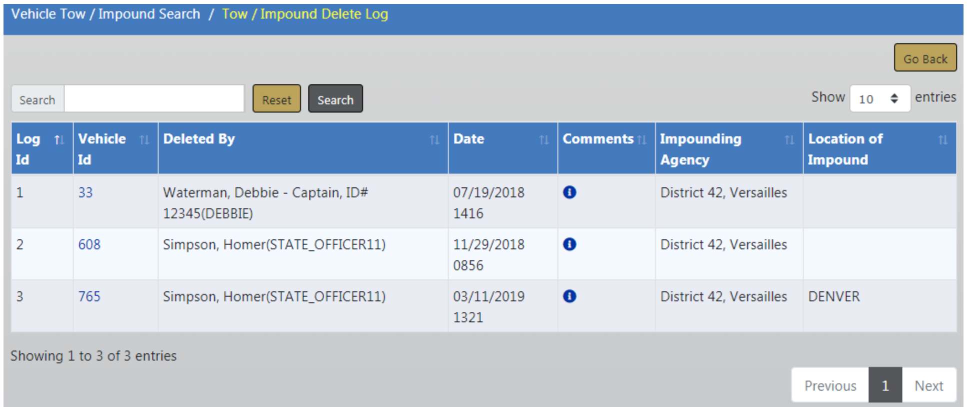
Search Vehicle Tow/Impound

Access the *Vehicle Tow/Impound Search* page to begin your search. For more information on accessing the *Vehicle Tow/Impound Search* page refer to "Overview" on page 631.



Click on the **Add Vehicle Tow/Impound** button to add a new tow record. For more information on adding a new tow record, refer to "Enter New Vehicle Tow" on page 636.

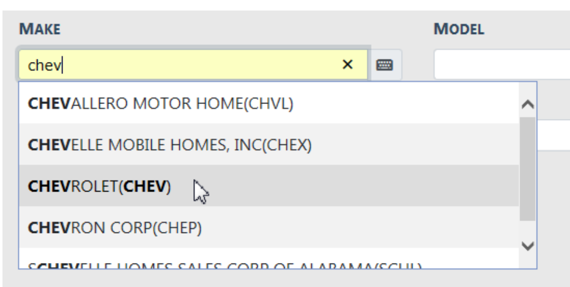
Click on the **View Delete Log** button to view deleted tow records.



Click the **Go Back** button to return to the *Vehicle Tow/Impound Search* page.

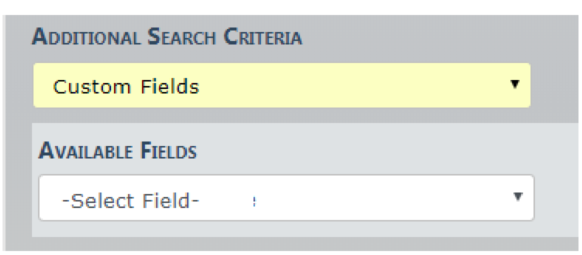
Enter your search criteria on the *Vehicle Tow/Impound Search* page to search and locate existing records that match your entered criteria.

When searching by Make and Model, begin entering a portion of the word and a list will appear from which to choose. For example, enter *Chev* in the **Make** field to display a list that contains *Chev* then click on the appropriate item that appears on the list. Optionally, do the same for **Model**



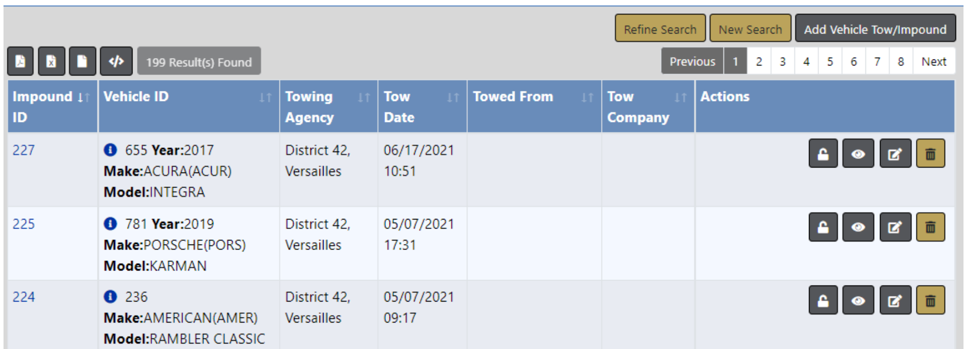
The **Additional Search Criteria** allows you to include other fields such as People, Organization, Officers, Tow Company, and Custom fields. Choose an option and enter criteria in the fields that appear based on your selection.

If you choose **Custom Fields** , the **Available Fields** appear; click in the field and choose from the drop-down list.

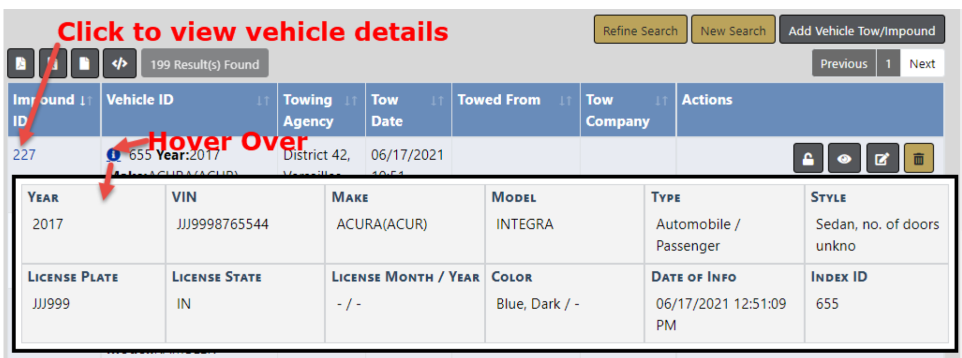


Note: Custom Fields is available for agencies that have the Custom Fields feature enabled. Custom Fields captures data defined by the agency. For more information refer to your administrator.

Click the **Search** button to display the search results.

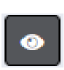


Hover the mouse over the blue information bubble to view a summary of the vehicle or click on the Impound ID to view vehicle and tow details.



With proper permissions, you can view, edit, delete Tow/Impound records, release holds, or release vehicles using the icons that appear under the *Actions* column. Only the icons to which you have access appear. If you do not have permissions to perform any of these tasks, refer to your agency administrator.

Action Icons

-  View Vehicle Tow/Impound Record
-  Edit Vehicle Tow/Impound Record. For instructions on editing tow records, refer to "Update Existing" on page 638.
-  Delete Vehicle Tow/Impound Record

- Release Holds. For instructions on releasing holds, refer to "Vehicle Holds" on page 643.

- Release Vehicle. All Holds must be released before you can release a vehicle.

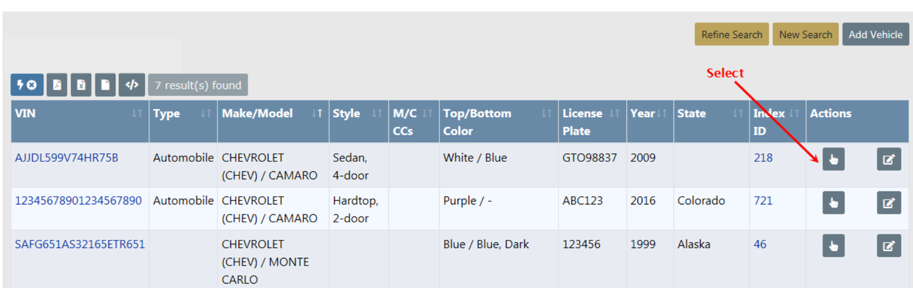
Enter New Vehicle Tow

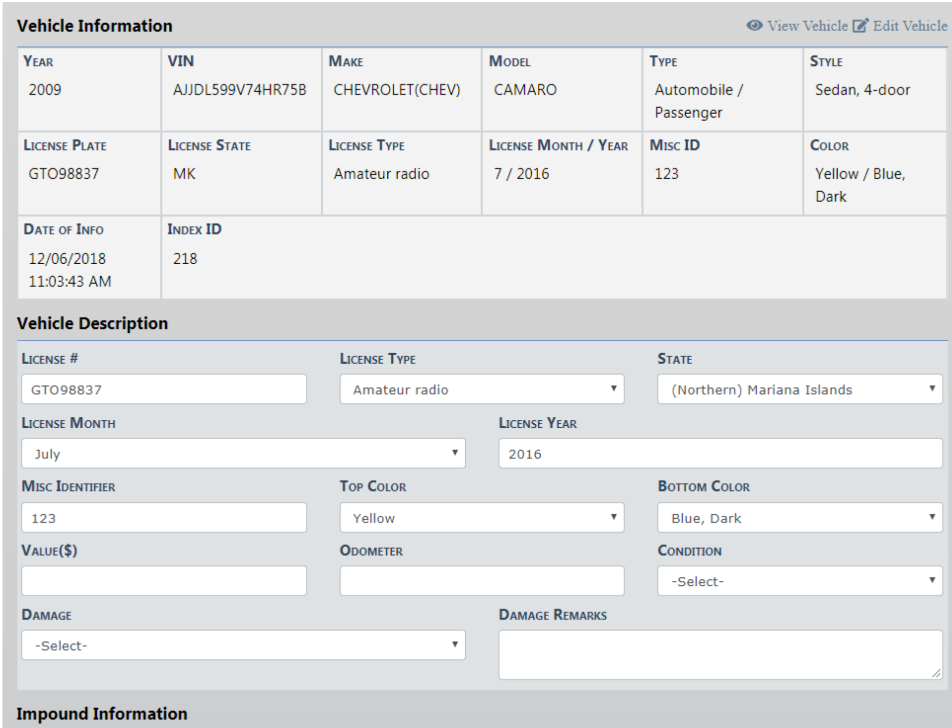
Access the *Vehicle Tow/Impound Search* page. For more information on accessing the *Vehicle Tow/Impound Search* page refer to "Overview" on page 631.

On the *Vehicle Tow/Impound Search* page, click the **Add Vehicle Tow/Impound** button to open the *Master Index Search* page. Search for the Master Vehicle Index record you want to add to the Tow/Impound module.

If the Master Vehicle Index record you are searching for does not exist, then click the **Add Vehicle** link to add a new Master Vehicle Index record. For more information on Master Indices refer to "Master Indices" on page 83.

In the *Vehicle Search Results* window, click the **Select** icon on the vehicle you want to add to a new **Tow/Impound** record.



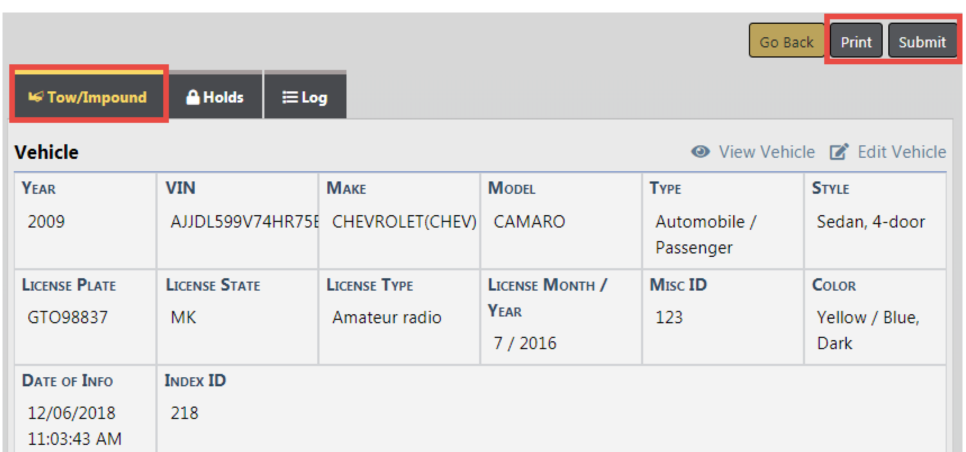


Enter the tow date and time and other relevant information for this **Tow/Impound** record.

Click the **Save** button on the bottom of the page, or upper right.

The *Edit Impound* page appears, allowing you to select a **Towing Company**, or specify one if it is not in the system. Also you can associate people, organizations, and other information. Holds are also managed here on a separate tab, along with an audit log on another tab. For more information on the *Edit Impound* page refer to "Update Existing" on the next page.

Click the **Print** button to print the record, or click the **Submit** button to submit the record for approval. For instructions on printing *Vehicle Tow/Impound* records, refer to "Print" on page 649.

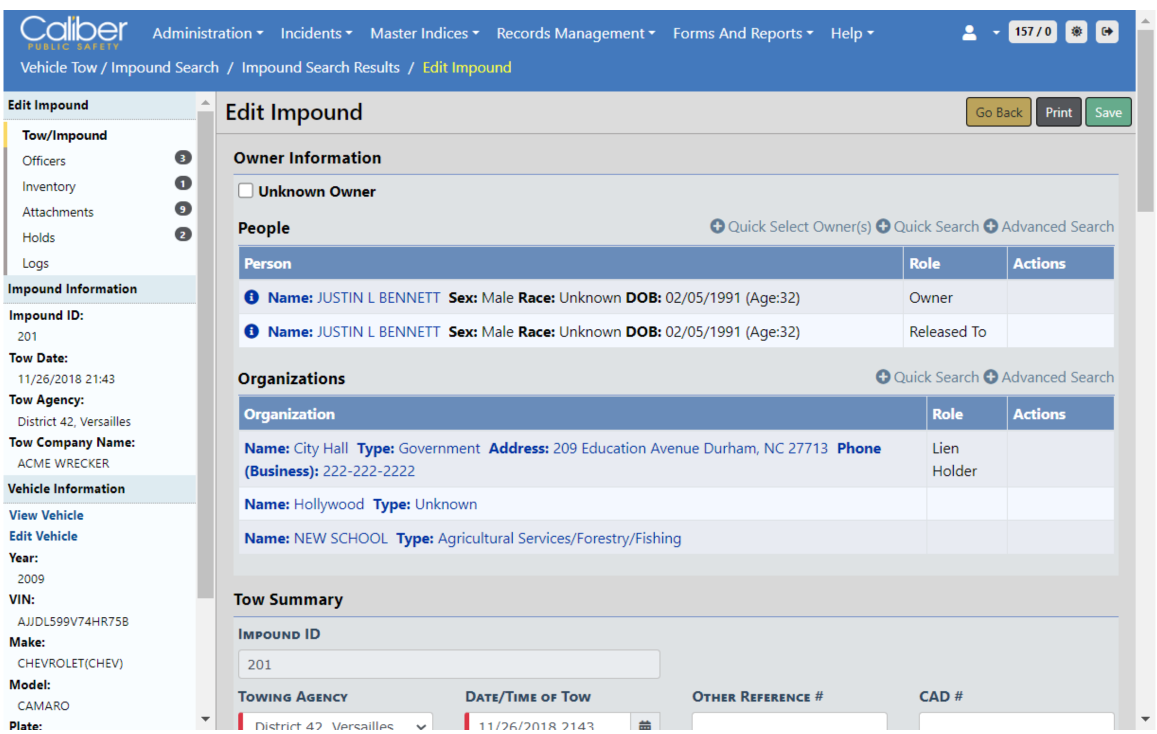


Update Existing

Search for the *Vehicle Tow/Impound* record you want to update. For more information on searching for existing records, refer to "Search Vehicle Tow/Impound" on page 633.

The creator can edit their initial impound records within or outside lock hours, regardless if there is a release date nor not. However, impound records that are pending approved or approved cannot be edited.

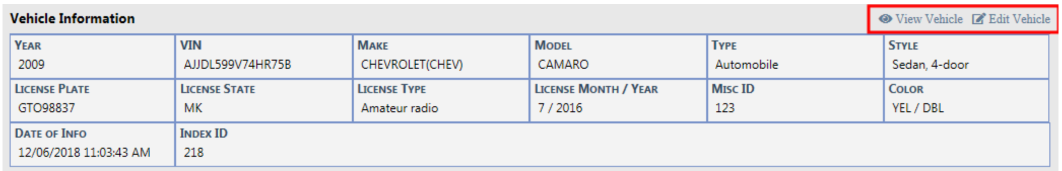
On the *Search Results* window identify the record you want to update then click the update icon  in the *Actions* column to open the *Edit Impound* page. The page consists of a side-bar menu and multiple sections that permit editing of the impound information.



Click the **Print** button on the top right to print the record. For instructions on printing *Vehicle Tow/Impound* records, refer to "Print" on page 649.

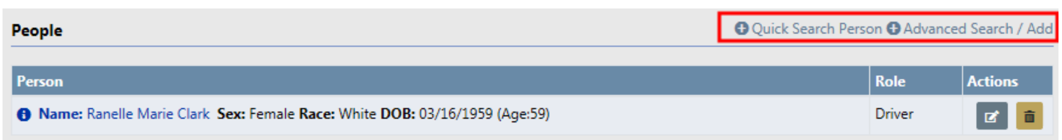
Vehicle Information

This section displays the *Master Vehicle Index* data. You can click on the **View Vehicle** link to view details of the index record or you can, with proper permissions, click on the **Edit Vehicle** link to edit the *Master Vehicle Index* record.

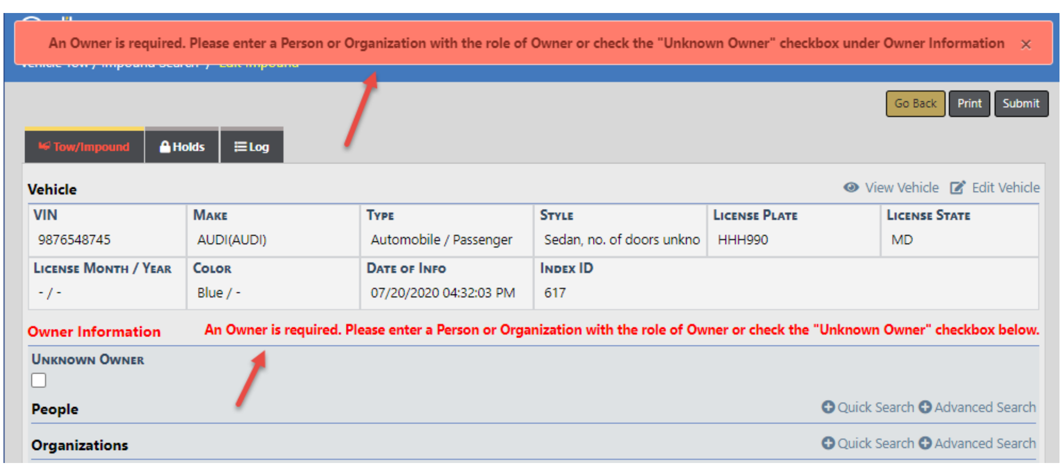


People

The **People** section allows you to search the *Master Name Index* and use existing records if already in system by clicking on the **Quick Search Person link**, or you can, with proper permissions, add a new *Master Name Index* record by clicking on the **Advanced Search / Add** link. For more information on Master Indices, refer to "Master Indices" on page 83.

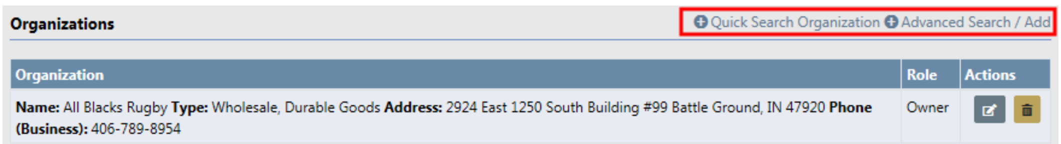


Owner information is required to update a Tow Impound record. If the record does not contain owner information, a message appears in red across the top of the form and below the Vehicle section when you click on the Update button. If the owner is unknown, check the **Unknown Owner** box to override the *owner required* warning.



Organizations

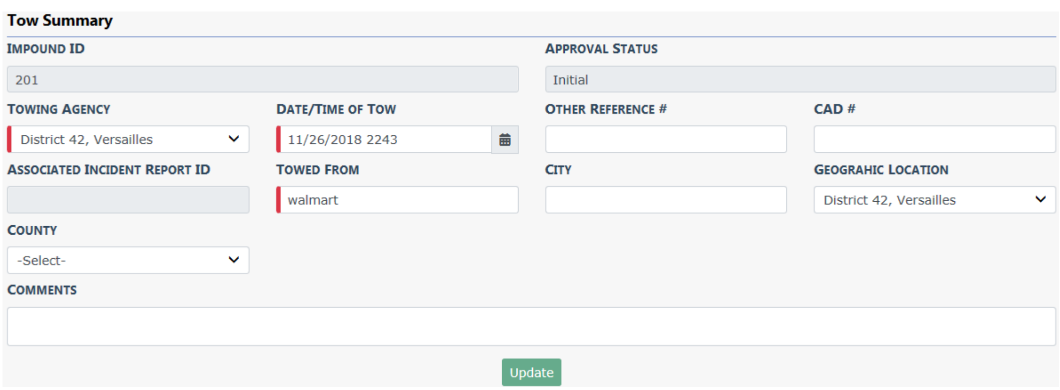
The **Organizations** section allows you to search the *Master Organization Index* and use existing records if already in system by clicking on the **Quick Search Organization** link, or you can, with proper permissions, add a new *Master Organization Index* record by clicking on the **Advanced Search/Add** link. For more information on Master Indices, refer to "Master Indices" on page 83.



Tow Summary

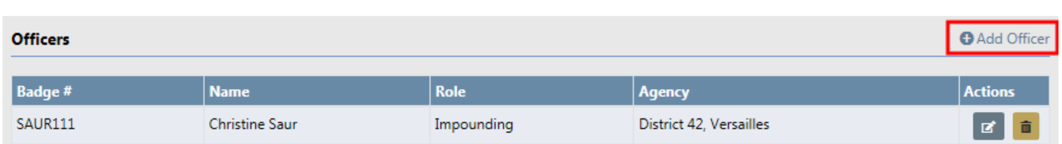
Enter the appropriate information then click the **Update** button.

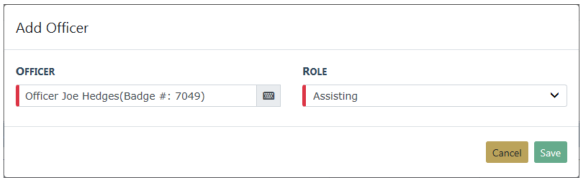
Note: The **Towing Agency** defaults to your agency and should not be changed.



Officers

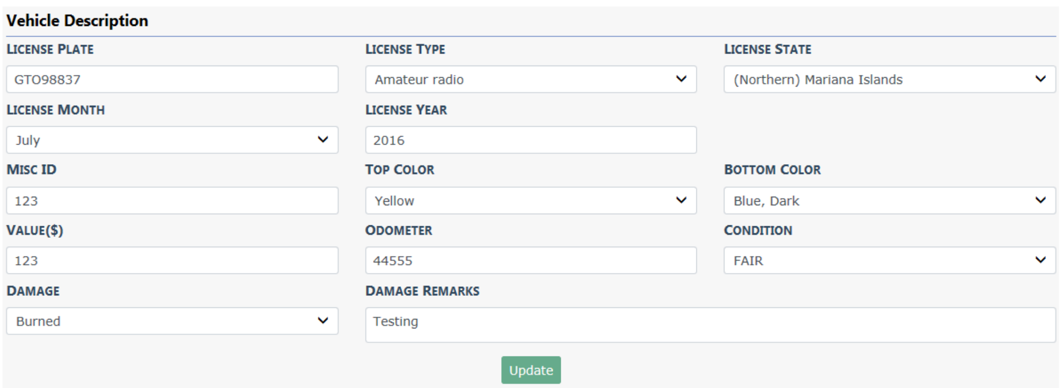
Click the **Add Officer** button to add an officer, then click **Save**.





Vehicle Description

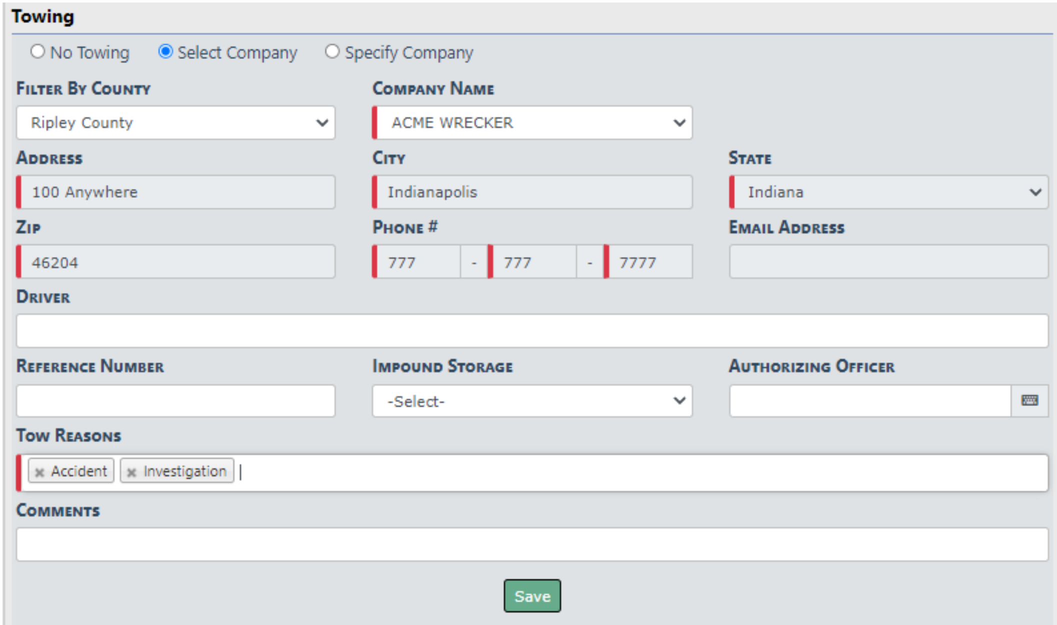
Enter the appropriate information then click the **Update** button. This is information based on your current observation.



Towing

Select one towing option: *No Towing*, *Select Company*, or *Specify Company*.

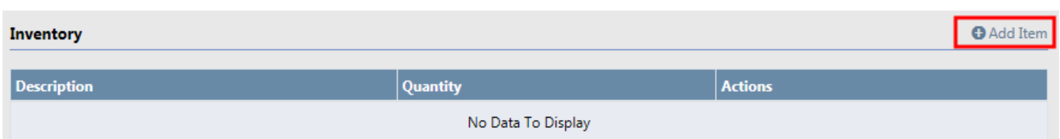
If you choose *Select Company* or *Specify Company*, enter the appropriate information in the fields provided. If you choose *No Towing*, no additional fields appear.



Click the **Save** button to save the record.

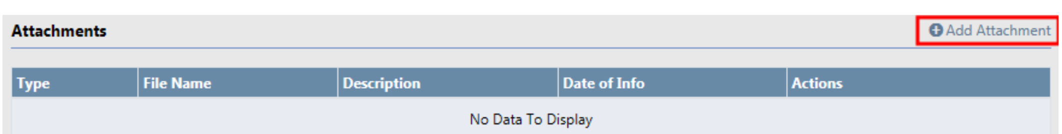
Inventory

Click the **Add Item** link to add an Inventory item.



Attachments

Click the **Add Attachment** link to add photos or documents.



For more information on attachments, refer to "Attachments" on page 69.

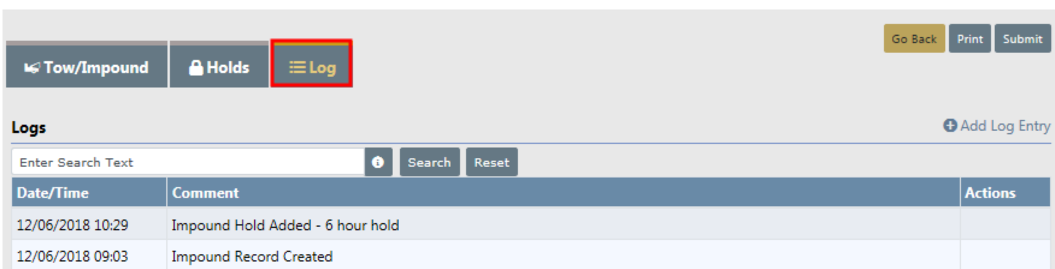
Holds Tab

This tab contains dates, reasons, and comments pertaining to vehicle holds and releases.

For more information on holds, refer to "Vehicle Holds" below.

Log Tab

Data that contains the date, time, and a summary of what occurred such as, when the record was created in Online RMS, hold and release dates, etc. The data is generated by Online RMS automatically, and you have the ability to manually add a log entry.



For more information on Log entries, refer to "Logs" on page 648.

Vehicle Holds

You can place a hold from the *Holds* tab of the *Edit Impound* page.

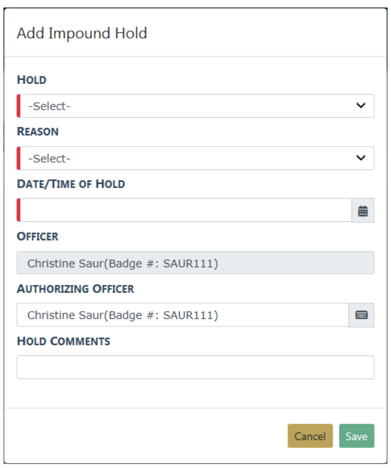
For more information on accessing the *Edit Impound* page, refer to "Update Existing" on page 638.

Place a Hold

Click on the *Holds* tab of the *Edit Impound* page.

Click on the **Add Hold** link to open the *Add Impound Hold* window.

Enter the appropriate information in the *Add Impound Hold* window, then click **Save**.



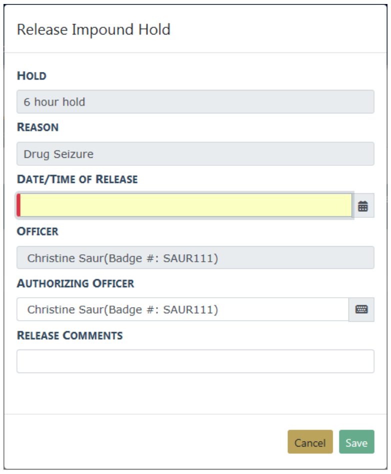
You can edit, delete, or release a hold by clicking on the appropriate action icon.

Release Holds

There are two ways you can release a hold:

- From the *Holds* tab of the *Edit Impound* page.

  To release a hold on a vehicle, click on the **Release Hold** icon that appears in the *Actions* column to open the *Release Impound Hold* window.

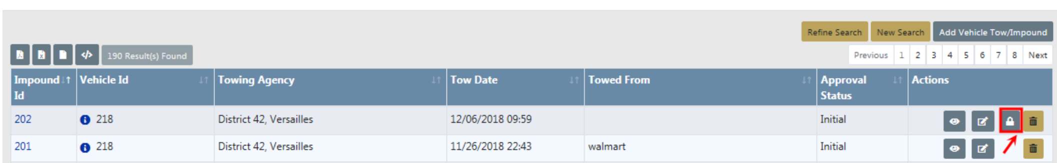


Enter the **Date and Time of Release** and **Release Comments**, then click the **Save** button.

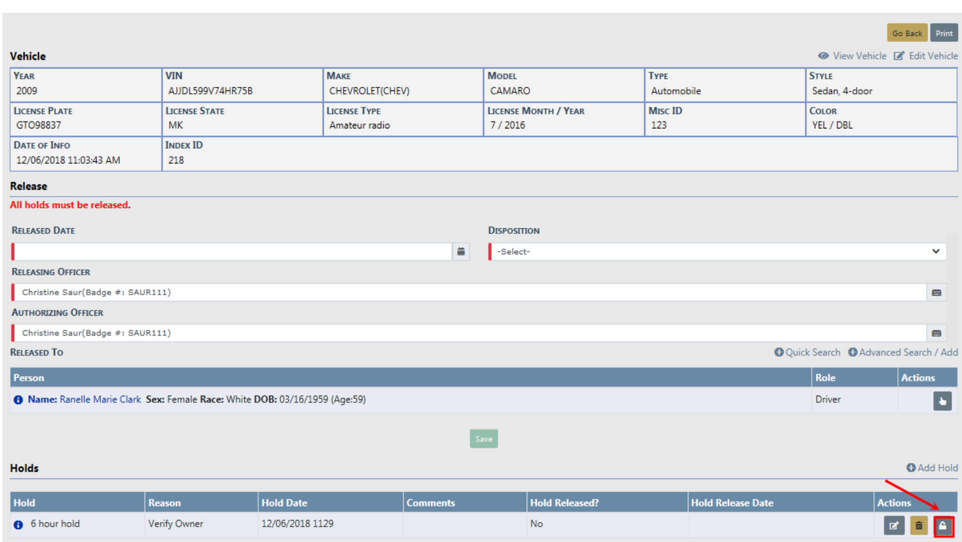
For more information on accessing the *Edit Impound* page, refer to "Update Existing" on page 638.

- From the *Impound Search Results*.

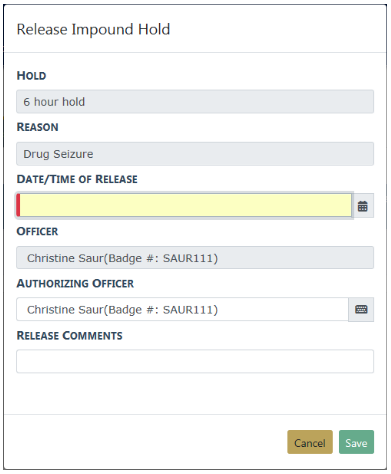
Click on the **Release Hold** icon to open the *Release Impound* page



Click on the **Release Hold** icon in the *Holds* section to open the *Release Impound Hold* window.



Enter the Date and Time of Release, and **Release Comments**, then click **Save**.



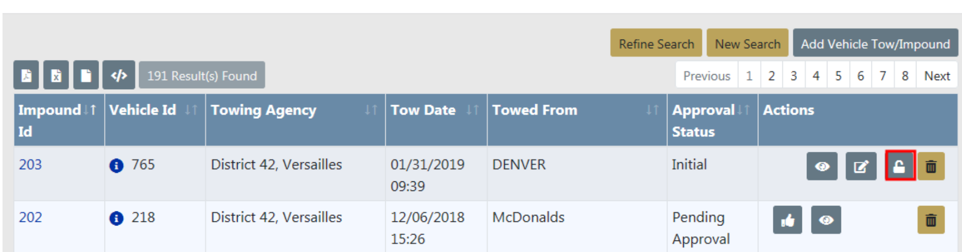
For more information on accessing the search results, refer to "Search Vehicle Tow/Impound" on page 633.

Release Vehicles

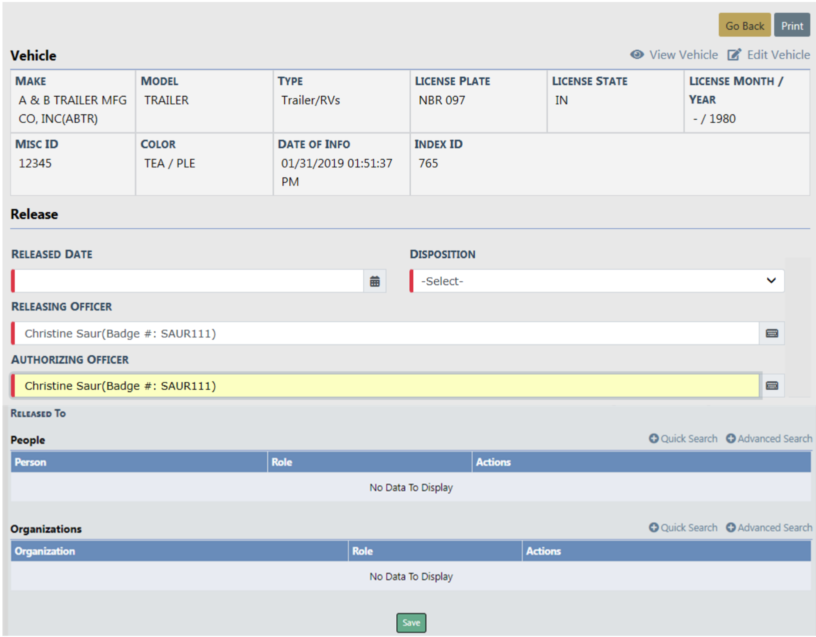
Vehicles are **Released** from impound from the *Impound Search Results* page.

Search for the *Vehicle Tow/Impound* record you want to release from impound. For more information on accessing the *Impound Search* page refer to "Overview" on page 631.

Locate the appropriate record in the *Impound Search Results* page that you want to release, then click on the **Release Vehicle** icon in the *Actions* column to open the *Release Vehicle Tow/Impound* form.



Impound Id	Vehicle Id	Towing Agency	Tow Date	Towed From	Approval Status	Actions
203	765	District 42, Versailles	01/31/2019 09:39	DENVER	Initial	
202	218	District 42, Versailles	12/06/2018 15:26	McDonalds	Pending Approval	



Note: All vehicle **Holds** must be released prior to releasing the vehicle. For instructions on releasing **Holds**, refer to "Vehicle Holds" on page 643.

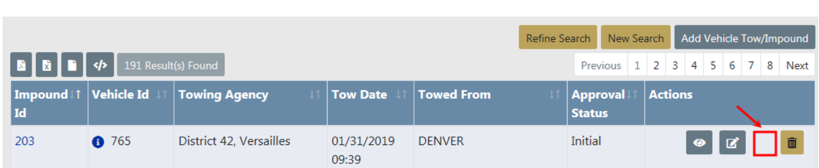
Click either the **Quick Search** or **Advanced Search** link to search and select the person or organization to whom the vehicle is **Released To**.

Note: If the person or organization record does not exist and you have proper permissions, you can create the *Master Person Index* or *Master Organization Index* record by clicking on the **Advanced Search** link. For instructions on creating a *Master Person Index* record, refer to the "Adding Person" on page 100 section of the *Master Indices* chapter (follow a similar process when adding *Master Organizations*). For more information on permissions, refer to your agency administrator.

Click the **Save** button. A **Successfully Updated** message briefly appears above the **Released Date**.

A record is added to the **Log** automatically.

Click on the **Go Back** button at the top of the page to return to the *Search Results* page. The **Release Vehicle** icon no longer displays in the *Actions* column on the vehicle record, indicating the vehicle is no longer in impound status.

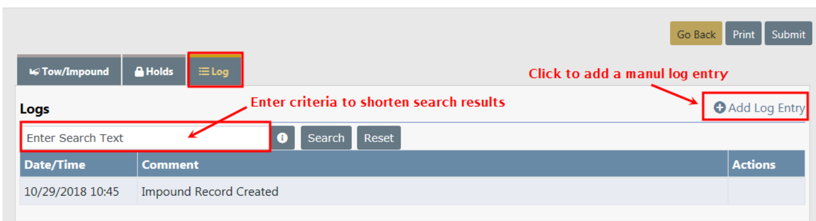


Click on the **Go Back** button to return to the *Vehicle Tow/Impound Search* page.

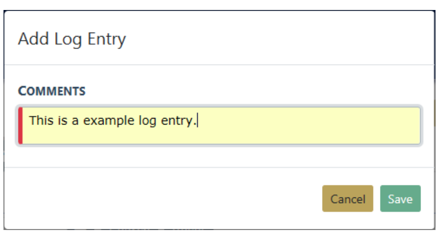
Logs

The *Log* tab of the *Edit Impound* page displays impound activity that was systematically logged for that particular vehicle, including manual log entries you create. For details on accessing the *Edit Impound* page, refer to "Update Existing" on page 638.

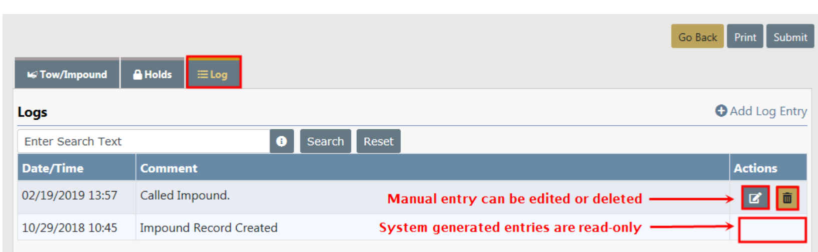
The number of log entries can get long. To search for particular log entries, enter a keyword in the search text field then click the **Search** button.



Optionally, click on **Add Log Entry** to create your own log entry, then enter **Comments** and the **Save** button.



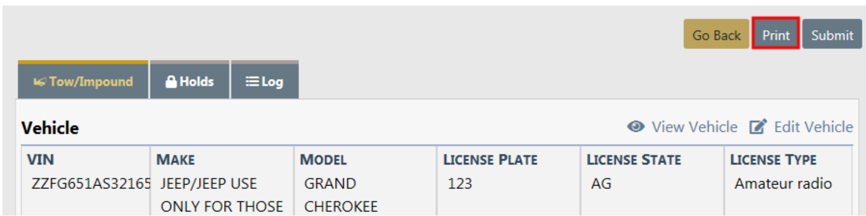
You can edit or delete manual log entries; however, log entries generated by the system are read-only. Click the edit icon  to update the record, or click the trash icon  to delete.



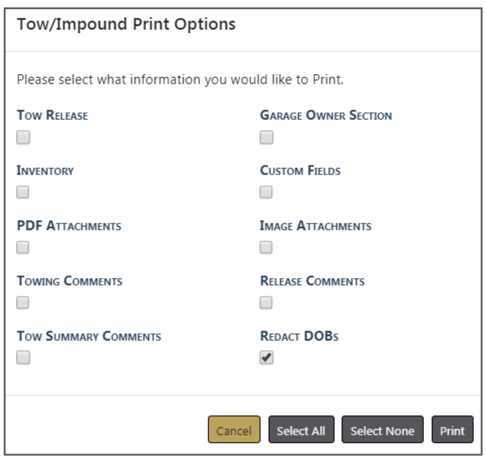
Print

You can print the *Vehicle Tow/Impound* record from the *Edit Impound* page. For instructions on accessing the *Edit Impound* page, refer to "Update Existing" on page 638.

Click the **Print** button on the top right of the window.



The *Tow/Impound Print Options* window opens. Select the options you want to include in the report; green options are included and gray options are not.



Click the **Print** button on the bottom right.

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

Note: If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

Chapter 32. Inventory and Assets

Inventory Overview

Inventory Management allows an organization to designate storage locations and maintain on-hand stock items. A user-defined hierarchy and shared item descriptors provide the agency with a means to perform uniform data entry across the entire organization. Managers of these locations can assign items to officers, employees, locations, vehicles, and organizations. Additionally management capability allows officers, employees, and supervisors to manage and track issued equipment. Accountability is maintained for each transaction which creates a history within the module.

Inventory Roles

There are three system-level inventory roles for the *Assets* and *Inventory* Modules:

- *Inventory Manager* role is given to any user who manages warehouse locations.
- *Inventory Sub-Manager* role is given to any user who is not a warehouse manager but who has control over non-warehouse (other) locations.

  Note: The two roles above are mutually exclusive. That is, no user should have both roles at the same time.

- *Inventory Admin* role is given to the user who controls the administrative set-up of the module. (This role can be combined with the Inventory Manager role) In addition, four pre-existing roles (Officer, Officer Supervisor, CID User, and CID Supervisor) have been given the new permission categories prefixed with Inventory For Officers.

Anyone who uses inventory management should have the *Inventory – Basic Access* permission category in order to have the basic inventory functionality.

Two basic permission categories are:

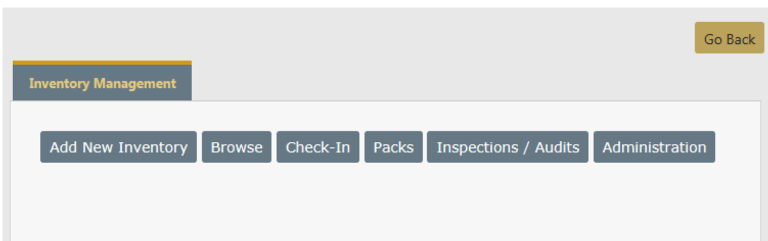
- Inventory – Show the Inventory Main Screen
- Inventory – Show the Officer Inventory Screen

Note: A user must have one of these to get started.

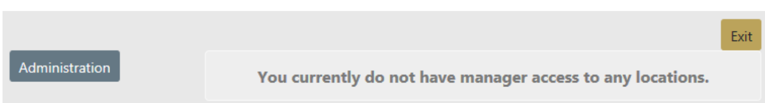
Note: Vehicle Make, Model, Type, and Styles share admin tables with the *Fleet Management Module*.

Inventory Management Page

When the administration or setup portion of *Inventory Management* is complete, the **Inventory Management** page appears. For more information on **Inventory Administration** refer to your agency administrator.



To gain access to the Inventory Management page, you must be assigned as a Location Manager. If you are not assigned as a Location Manager a message appears on the right stating you do not have manager access to locations. If you have Inventory_Manager permissions, an **Administration** button also appears on the **Inventory Management** page.



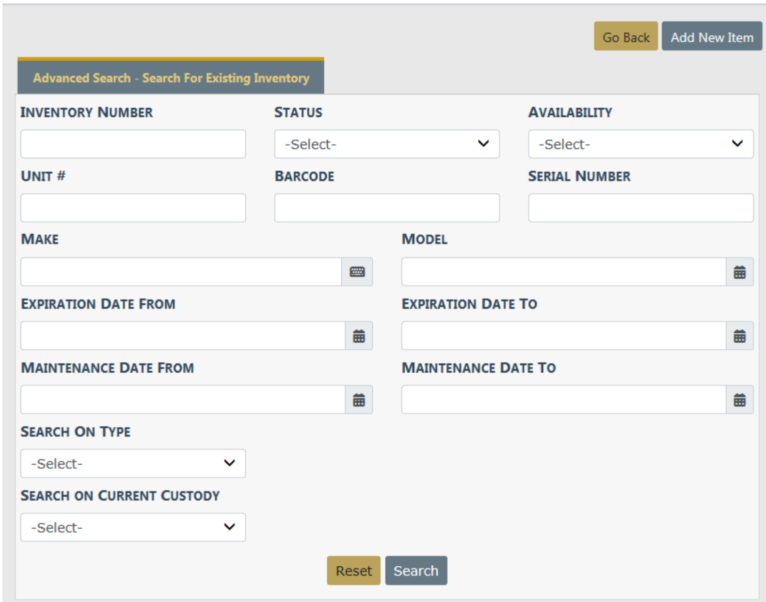
If visible, click the **Administration** button, to open the **Inventory Administration** page to set up Location Manager. For more information on **Inventory Administration** refer to the *Caliber Online Administration Guide*.

If the **Administration** button is not visible, contact your agency administrator.

Add Inventory

Add Inventory allows you to add quantities to current items. Use the following procedures to add Inventory:

From the *Inventory Management* page, select the **Add New Inventory** link to open the *Search For Existing Inventory* page.

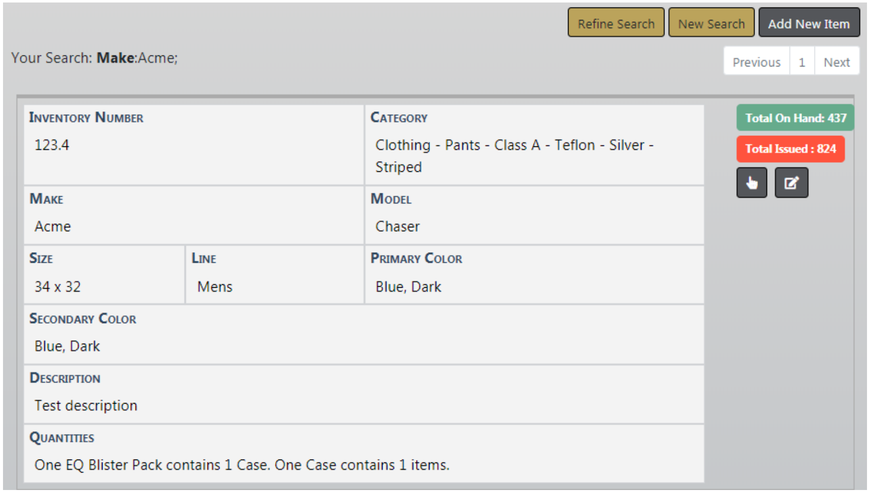


Note: The first step to adding inventory is always to search for existing inventory with descriptions that apply to the item(s) you want to add. This is to ensure that duplicate entries are not made. The goal is to locate and use existing entries to add additional quantities so that the same descriptors are shared across the entire organization.

Perform the search to display the Search Results page. For details refer to "Search for Existing Inventory" on the next page.

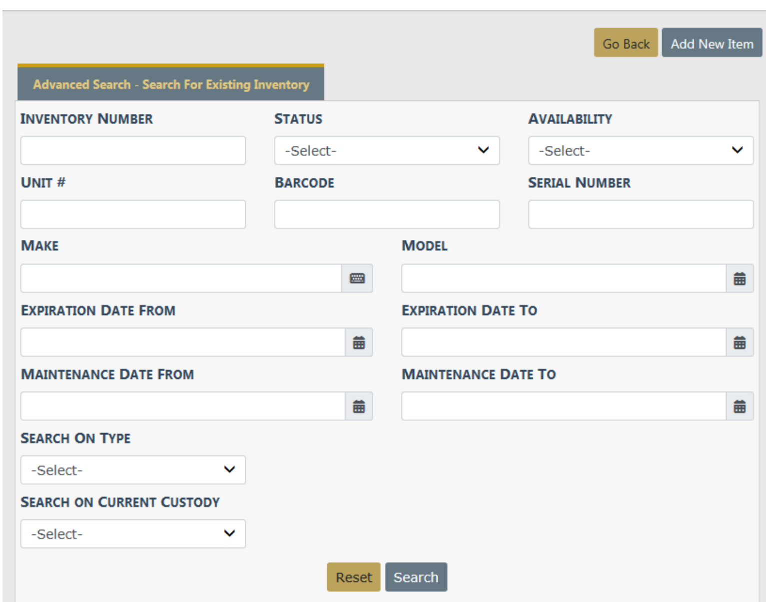
If there are no matches to your search then you need to add the new inventory. For details refer to "Add New Inventory" on page 657.

If the search results returns records, add the inventory to existing inventory. For details refer to "Add to Existing Inventory" on page 655



Search for Existing Inventory

From the *Incident Management* page, select the **Add New Inventory** link to open the *Search For Existing Inventory* page.

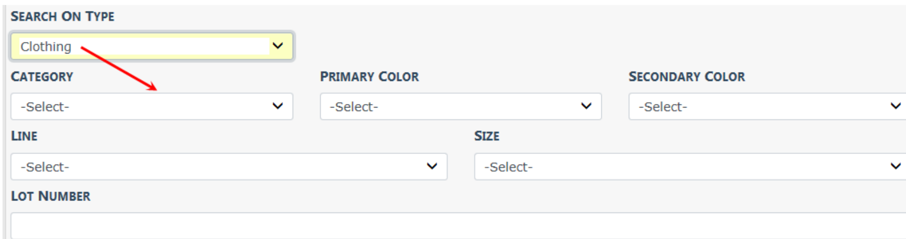


Complete as many of the fields in the Advanced Search section as you can.

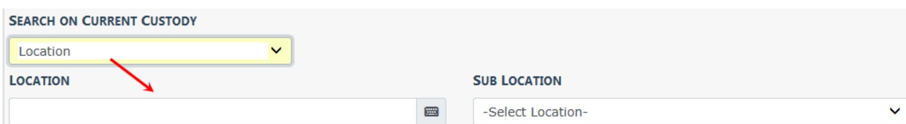
- The Inventory Number field is not required, and it only applies if your agency uses inventory numbers.
- Select/enter values for any of the fields for which you have information.

- Any field with an Auto Filter icon to the right provides a list that matches your text. Begin typing in this field and it brings up a selection based on what you have typed. The fields that display **-Select-** contains a drop-down selection from which to choose. Click a selection to pull it into the field.

If you choose **Search On Type**, additional fields appear based on your selection.

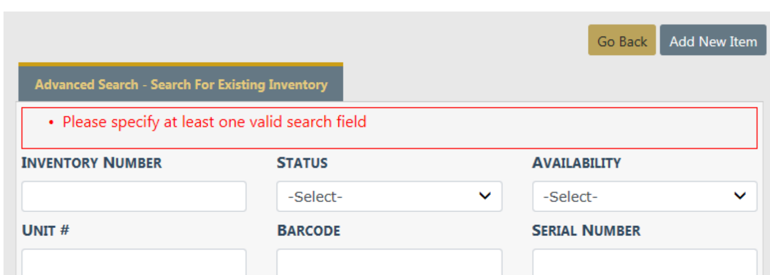


If you choose to **Search on Current Custody**, additional fields appear based on your selection.



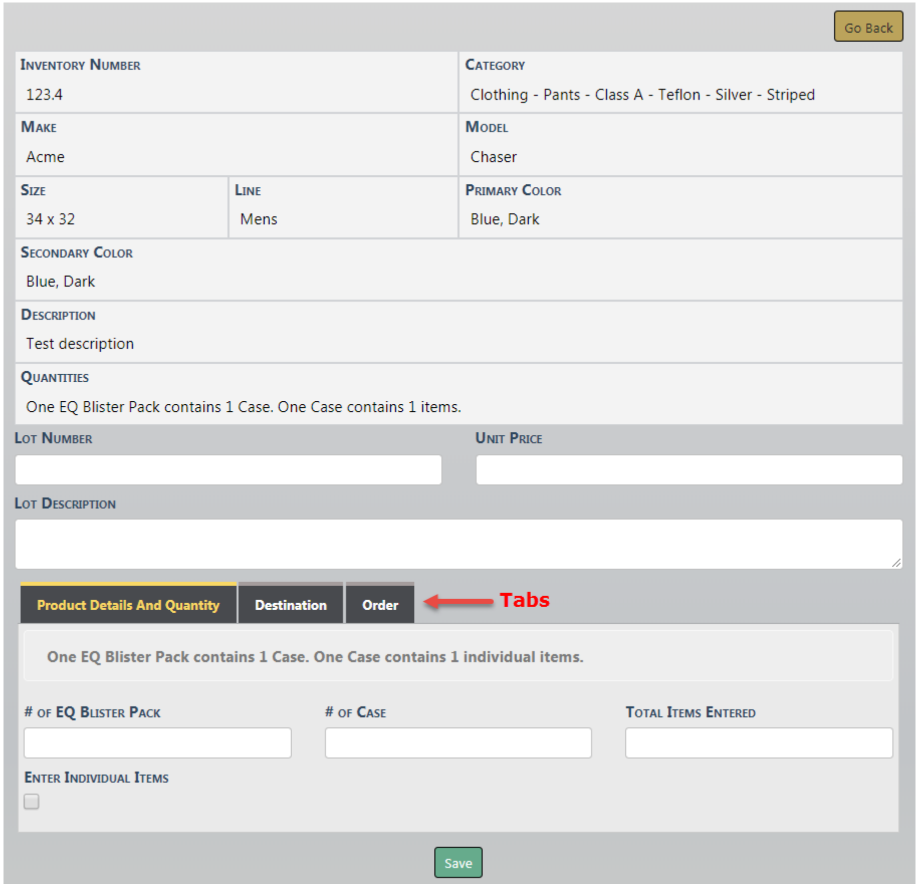
Once you have made the selections, select **Search**.

If you select **Search** without entering a valid search field, the *Search For Existing Inventory* page displays with an error message as shown.

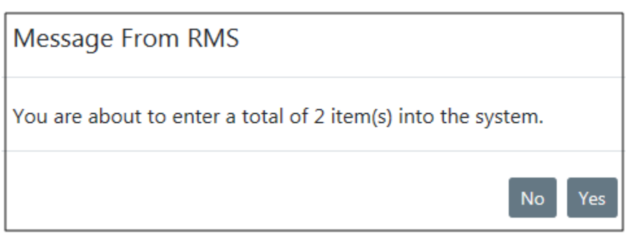


Add to Existing Inventory

Once you have performed a search and the search results page returns, locate an item description that matches the item(s) you want to add to the inventory then select the next to the item to add to the inventory.



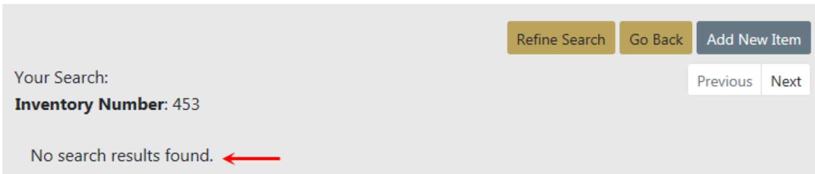
Enter all the information you have available to include the Product Details and Quantity. Destination and Order Tabs. Select **Save**. You receive the message ensuring you that the new item(s) are being entered into the system.



Click **Yes** to enter the new items, or click **No** to return to the previous screen without entering the new items.

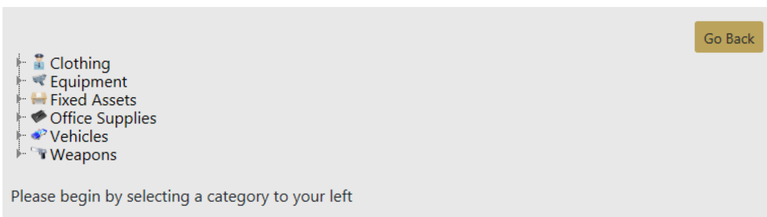
Add New Inventory

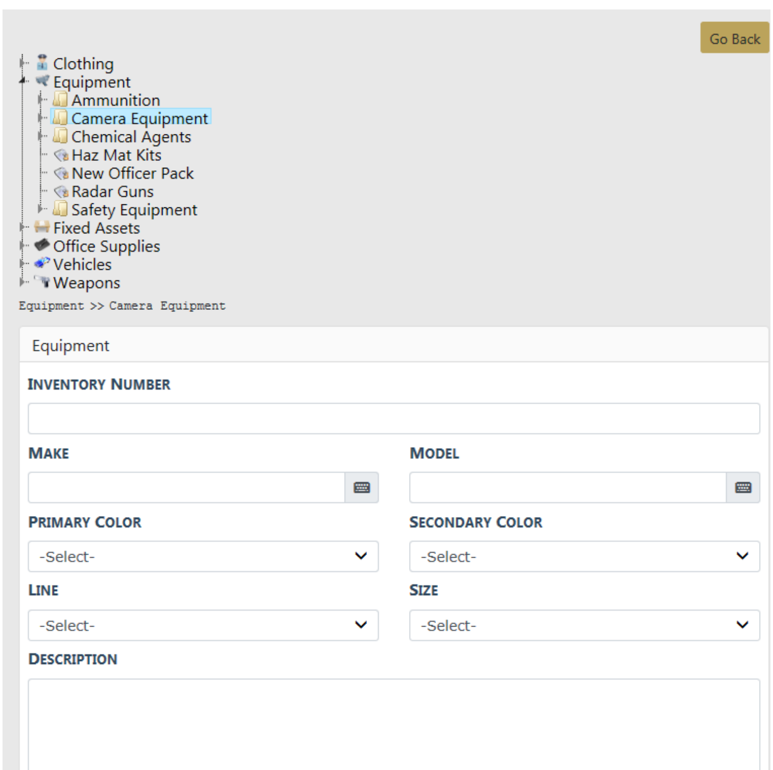
If there is nothing in the system that matches your search, a *No search results found* message displays.



Add the new item by selecting the **Add New Item** button on the top right.

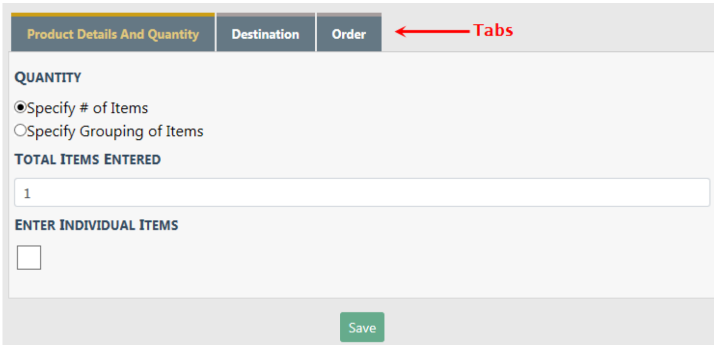
Begin by selecting a Category to your left.





Enter as much information regarding the new Inventory item.

Page down to fill in the *Product Details*, *Destination* and *Order* tabs. Required fields display a red border to the left of the field. Be sure to check all tabs for required fields.



Once all information is entered for the New Inventory Item, select **Save**.

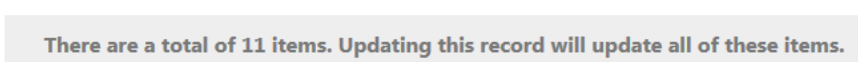
You receive a notification that you are about to enter an amount of items into the system, select **Yes** or **No**.

Edit Entries

The inventory manager can edit entries in the inventory module. However, the manager must always be aware that item descriptors are shared so edits affect other agencies in the same organization.

- Editing Item Descriptors (shared): When adding new inventory the inventory manager searches to determine if the item descriptors already exist in Online RMS. If search results return a match, the manager selects item descriptors to add new quantity on-hand to update the warehouse. While reviewing the search results, the user can also edit item descriptors.

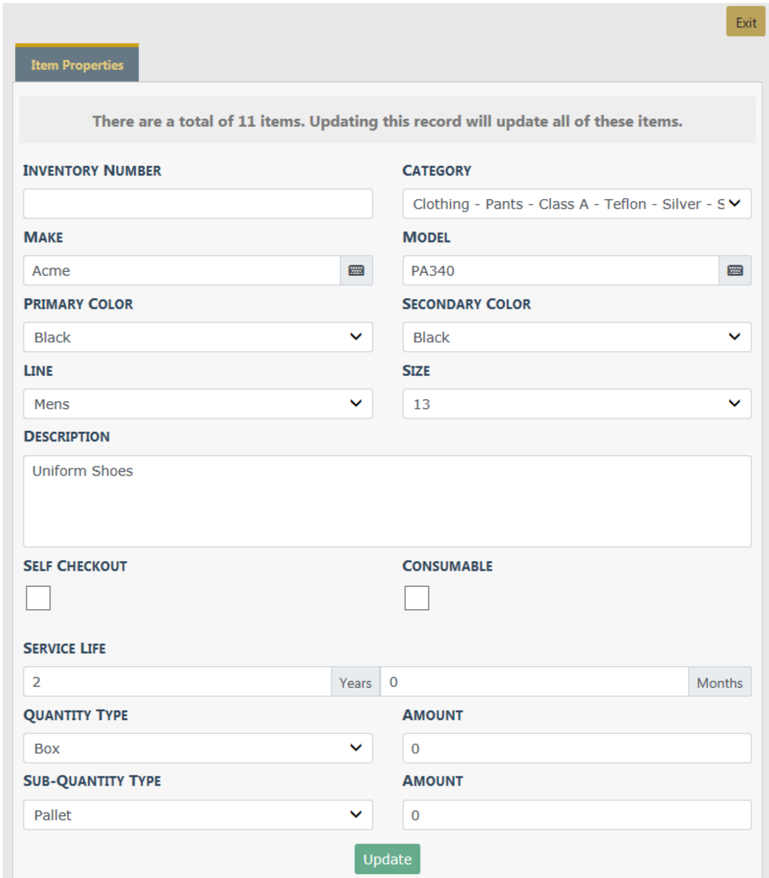
Note: Changes affect all entries across the entire organization. A warning banner displays across the top of the page if matching records exist.



- Editing Item Details (not shared): While browsing existing inventory (stock on-hand), the manager can edit the on-hand detail specific to the warehouse. Fields open for edit include: Unit Number, Serial Number, Barcode Number, Expiration Date, Maintenance Date, Status, Usability, and the Disposed check box.

Log entries can be reviewed or created as needed per item. Custody history is also available for viewing and is updated automatically each time an event takes place

Select the  icon next to the item you wish to edit to display the edit page.



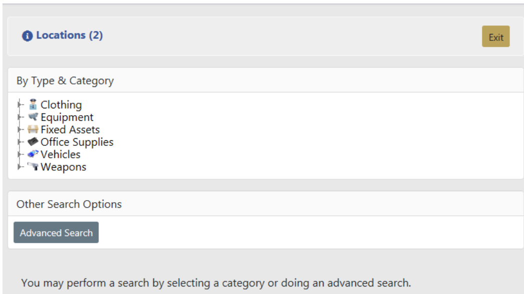
Make the needed changes then select **Update**. A message appears across the top of the page letting you know the Inventory Item has been updated. Select **Exit**.

You may edit another item or elect to **Go Back** so you can search for another item to perform the same or a different task.

Browse

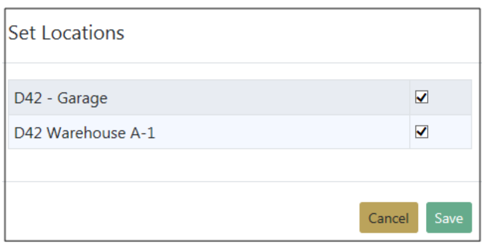
Using the **Browse** feature, the inventory manager can search one or more warehouse locations by the type and category tree. (An advanced search is available for greater refinement.) The search results allow the inventory manager to select items to create a list. The inventory manager can then take action on the list, which is treated as a single group, and the selected action is applied to all items in the list. Actions available allow the inventory manager to assign items as needed to meet various needs. (Online RMS records each transaction as it occurs.)

From the *Inventory Management* page, click the **Browse** option to display the Browse screen.



The number of locations available to the current user is shown to the far left in the *Locations* banner near the top of the page.

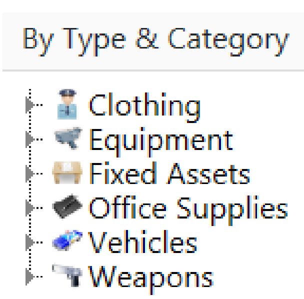
Click the blue information bubble icon to the left of *Locations* to set the locations.



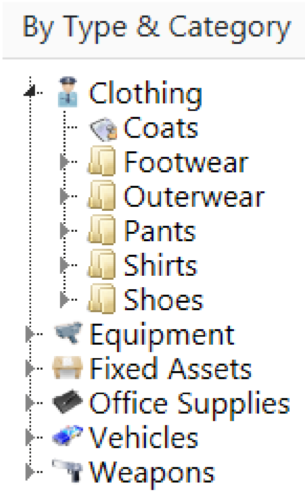
To make the listed location available, ensure the box to the right is checked

To make the location unavailable, remove the check mark

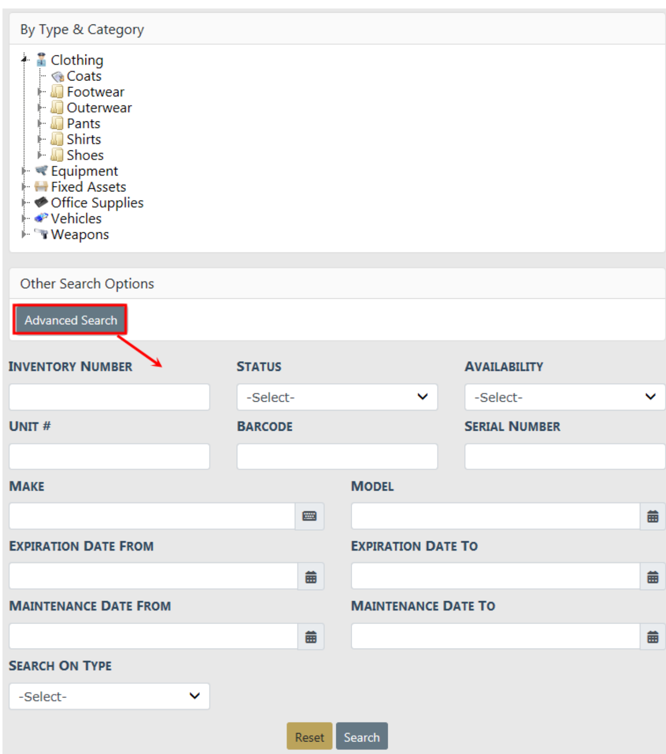
Types are listed in the **By Type & Category** section in the upper left.



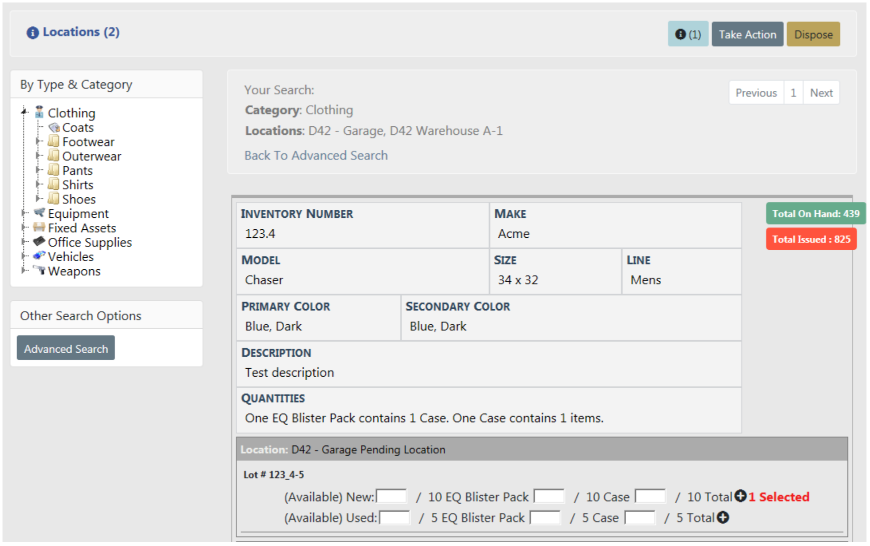
Categories are contained within the types folders.



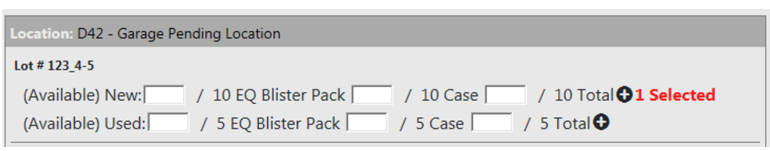
The *Other Search Options* contains *Advanced Search*. Click on the Advanced Search button to view additional search fields.



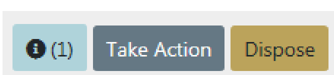
Enter the search criteria then click the **Search** button to return results.



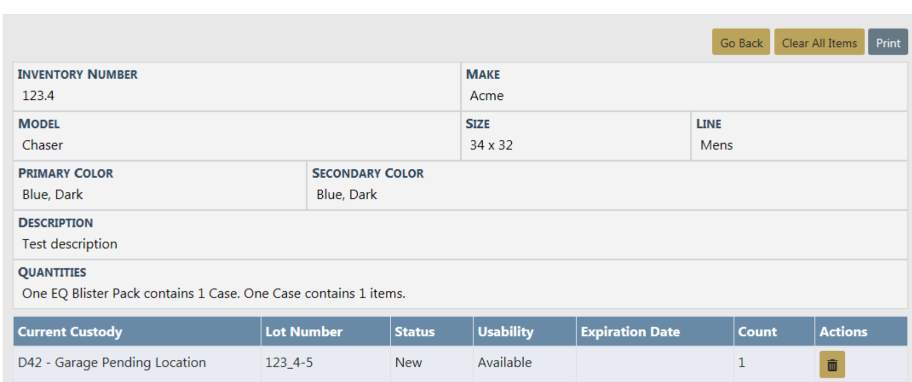
To select items from a category, type the quantity that you want to select in text field to the immediate left of the icon and click to display the number of items you want to select as shown in the partial example below.



When you have selected items, the number of items selected as well as the Take Action and Dispose option replace the No Selection label to the far right in the Location banner.

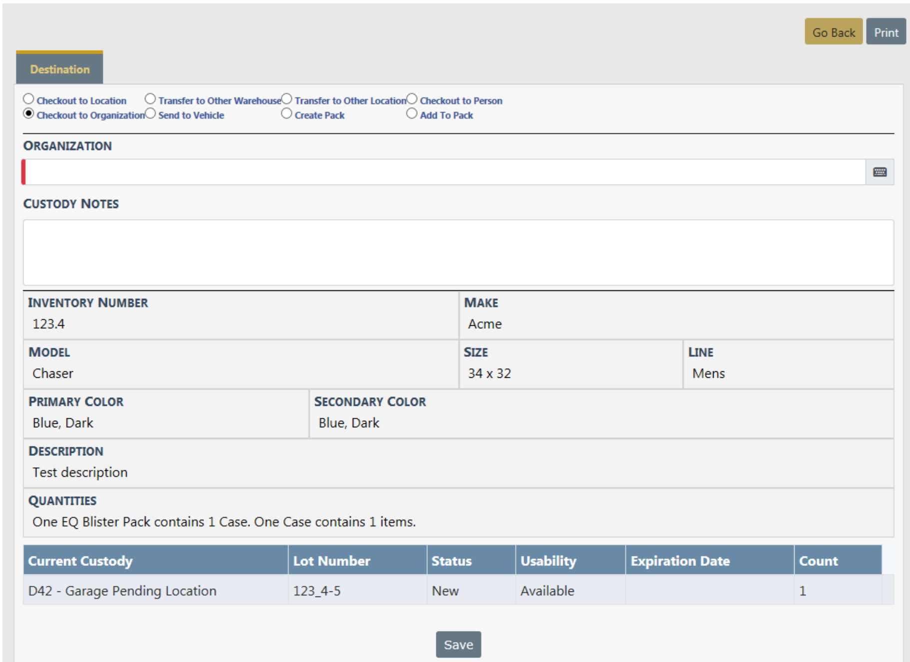


You can click on the icon to display the *View Selected Items* page where you can delete individual items, Clear All Items, and/or Print your current selection. Select **Go Back** to return to the previous page.



Continue to browse and select items as needed.

When you have selected all the items you want to take a particular action on, click **Take Action** to display the *Inventory Management* page as shown.



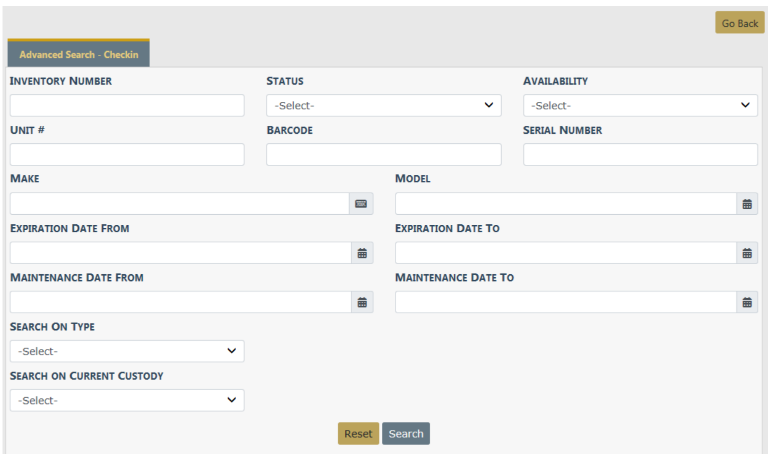
Select the appropriate radio button to indicate the destination of the item(s):

- Selection of Checkout to Location or Transfer to Other Location changes the display to include a field for selection of a Location.
- Selection of Checkout to Organization changes the display to include a field for selection of an Organization field.
- Selection of Checkout to Person changes the display to include a field for selection of an Officer / Employee.
- Selection of Transfer to Warehouse changes the display to include a field for selection of a Warehouse.
- Selection of Send to Vehicle displays the Select Vehicle window to allow selection of a vehicle.
- Selection of Create Pack changes the display to include additional fields to set up a pack.
- Selection of Add to Pack displays the Select Pack window to allow selection of a pack.

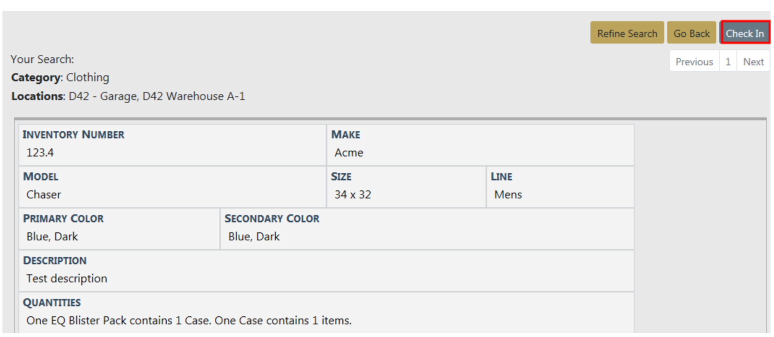
Check In

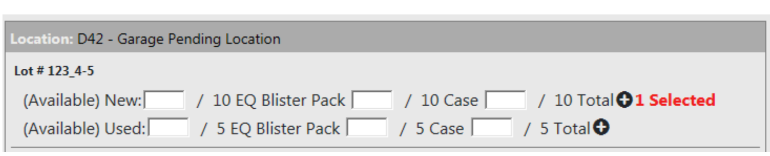
The inventory check-in process allows the manager to search for and check-in items that have been checked out (assigned) to a person, location, organization, or vehicle. A printed receipt to formalize the process is also available should one be needed.

From the *Inventory Management* page, select **Check-In** to open the *Advanced Search - Checkin* page.

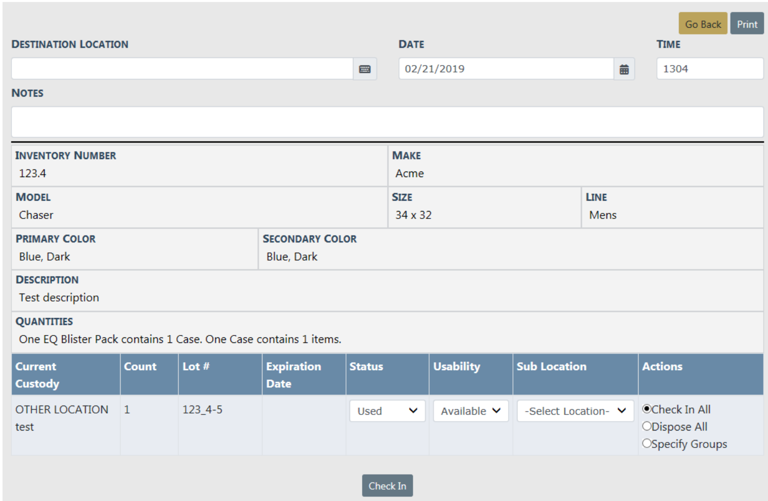


Perform a search to locate the item(s) you want to check in. Enter the number to checkin to the left of the item, then click the plus sign (+) to select.



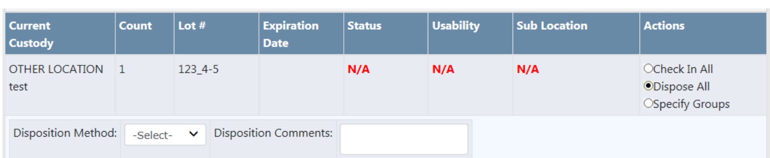


Select **Check In** to display the *Check In* page.



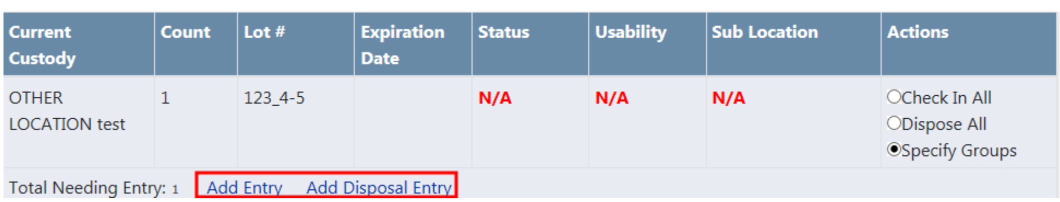
Complete the Destination Location field and other fields as needed. Select the applicable radio button in the *Action*s column.

When you choose to Dispose of an item(s) you are given the option to select the Disposition Method and enter any Disposition Comments, and click **Check In**.



Current Custody	Count	Lot #	Expiration Date	Status	Usability	Sub Location	Actions
OTHER LOCATION test	1	123_4-5		N/A	N/A	N/A	Check In All Dispose All Specify Groups
Disposition Method: -Select-	Disposition Comments:						

When you choose to Specify Groups **Add Entry** and **Add Disposal Entry** links appear. Click on the links to enter additional information.



Current Custody	Count	Lot #	Expiration Date	Status	Usability	Sub Location	Actions
OTHER LOCATION test	1	123_4-5		N/A	N/A	N/A	Check In All Dispose All Specify Groups
Total Needing Entry: 1 Add Entry Add Disposal Entry							

A notification appears at the top of the screen advising the **Check In** was successful.

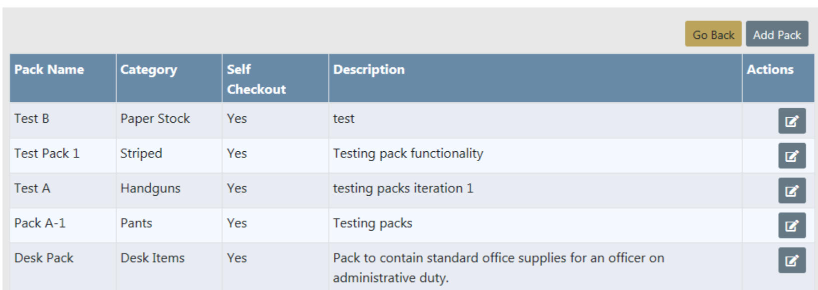
> **Note**: For items checked back into a specific location, the on-hand count increases and the current location updates.

Packs

A **Pack** is a collection of items within a single grouping, i.e. initial issue. The **Pack** can then be checked out (assigned) as necessary.

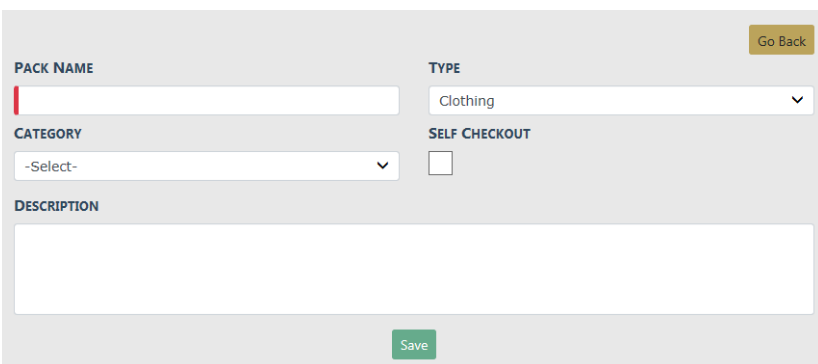
> **Note**: Before a new **Pack** can be created, the inventory manager must set up a pack category in the inventory tree under the appropriate type. (Pack categories can be set up under more than one type.) This is done via the *Inventory Setup* tab in the *Inventory Administration*.

From the *Inventory Management* page, select the **Packs** option to open the *Inventory Management - Manage Packs* page.



Pack Name	Category	Self Checkout	Description	Actions
Test B	Paper Stock	Yes	test	
Test Pack 1	Striped	Yes	Testing pack functionality	
Test A	Handguns	Yes	testing packs iteration 1	
Pack A-1	Pants	Yes	Testing packs	
Desk Pack	Desk Items	Yes	Pack to contain standard office supplies for an officer on administrative duty.	

Select the **Add Pack** button to open the *Manage Packs - Pack Details* page.



- Click in the Pack Name field and type a meaningful name to identify this grouping.
- In the Type field, select the type of inventory item to be grouped in this pack.
- In the Category field, select the appropriate pack category.
- If you want individuals to be able to check out this pack, click the Self Checkout box.
- In the Description field, type a brief description of the item.
- Select **Save** to return to the previous page where the new **Pack** now appears.

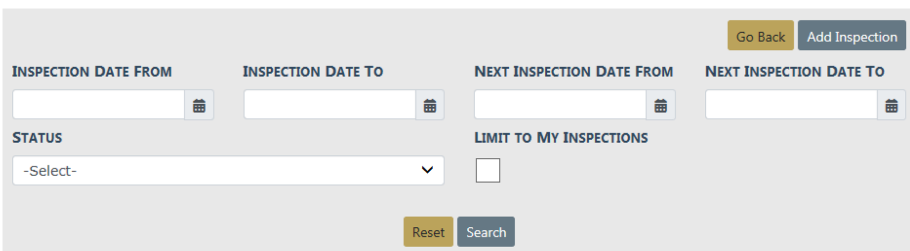
Inspections / Audits

Online RMS allows users with the appropriate roles to create inspections/audits and maintain the records. The idea is to create each type of inspection/audit that the agency needs. Print the report and use it to record the results of an inspection or audit.

> **Note**: An **Audit** is a count of items by type, location, custody, and so forth. An **Inspection** also provides information about the item(s). The printed paper report available from each instance of an inspection/audit is used to record the results of the inspection/audit. The content of the report is persistent (stays the same over time) unless edited.

From the *Inventory Management* page select **Inspections / Audits**.

The *Inspection Search* page appears.

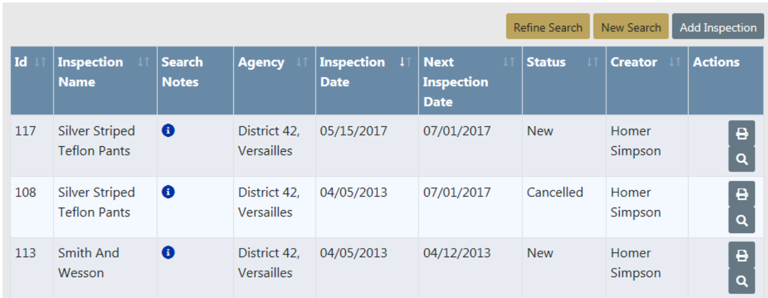


This page displays first to allow you to locate any existing inspection reports that suit your purpose, and if none are available, use the **Add Inspection** link to create a new one.

If you know that you need to create a new inspection, there is no need to perform a search, click the **Add Inspection** button to open the *Inventory Management - Add Inspection* page and create a new inspection (audit).

You can search by Inspection Date or Next Inspection Date (use the calendar icon to specify a beginning and/or ending date), by Status (New, Completed, Canceled), or you can limit the search to only the inspections you have created by clicking the Limit to My Inspections box, or just click Search to return a list of all inspection records, which may be an extensive list.

Complete the fields to limit your search as needed, then click **Search** to display the *Inspection Search Results* page.



Refine Search | New Search | Add Inspection

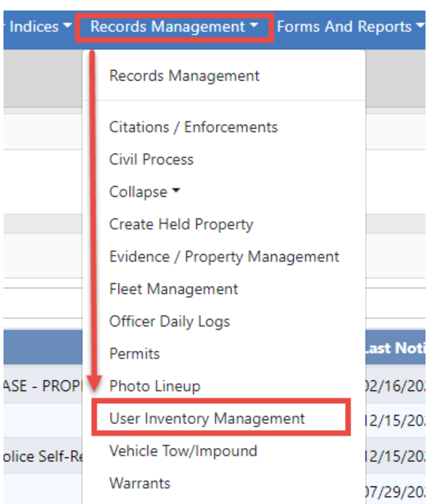
Id	Inspection Name	Search Notes	Agency	Inspection Date	Next Inspection Date	Status	Creator	Actions
117	Silver Striped Teflon Pants		District 42, Versailles	05/15/2017	07/01/2017	New	Homer Simpson	
108	Silver Striped Teflon Pants		District 42, Versailles	04/05/2013	07/01/2017	Cancelled	Homer Simpson	
113	Smith And Wesson		District 42, Versailles	04/05/2013	04/12/2013	New	Homer Simpson	

The icons in the *Actions* column allow you to edit the inspection (if you are the owner), print it, or review it. If an icon is not available to you, then you do not have permissions to perform that action.

User Inventory Management

Use the following procedure to access the *User Inventory Management* module:

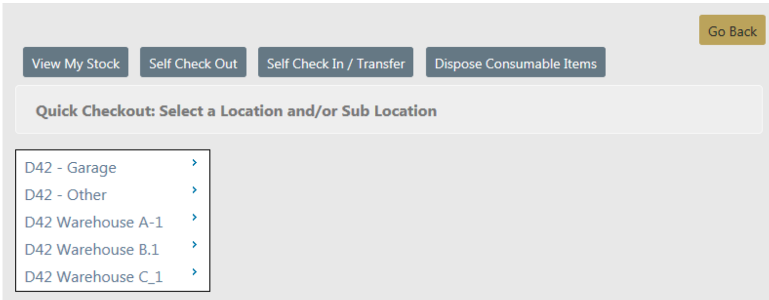
From the Home page, click the *Records Management* label to display a drop-down menu as shown.



Select the *User Inventory Management* option to display the *Inventory Management* page as shown below. There are four tabs available:

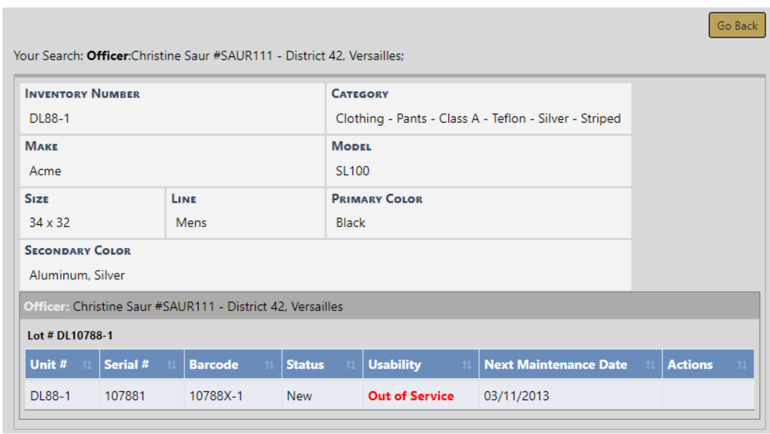
- View My Stock
- Self Check Out
- Self Check In/Transfer

- Dispose Consumable Items



Note: Depending upon your agency's configuration set-up and your roles and permissions, the options displayed may vary.

Select **View My Stock** to open the view *My Stock - Search Results* page.

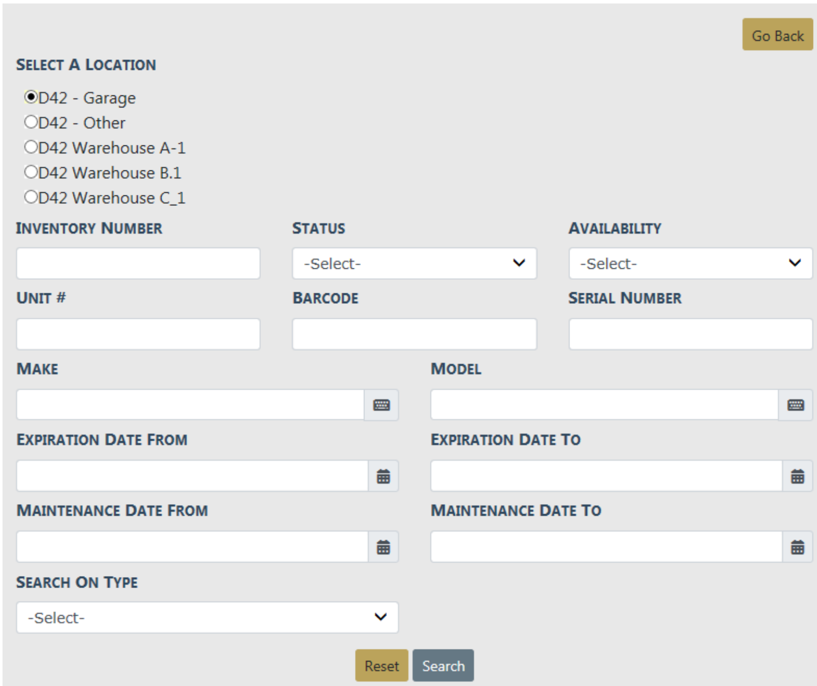


This allows the Officer/Employee to view the items that have been issued or checked out to them.

Self Checkout

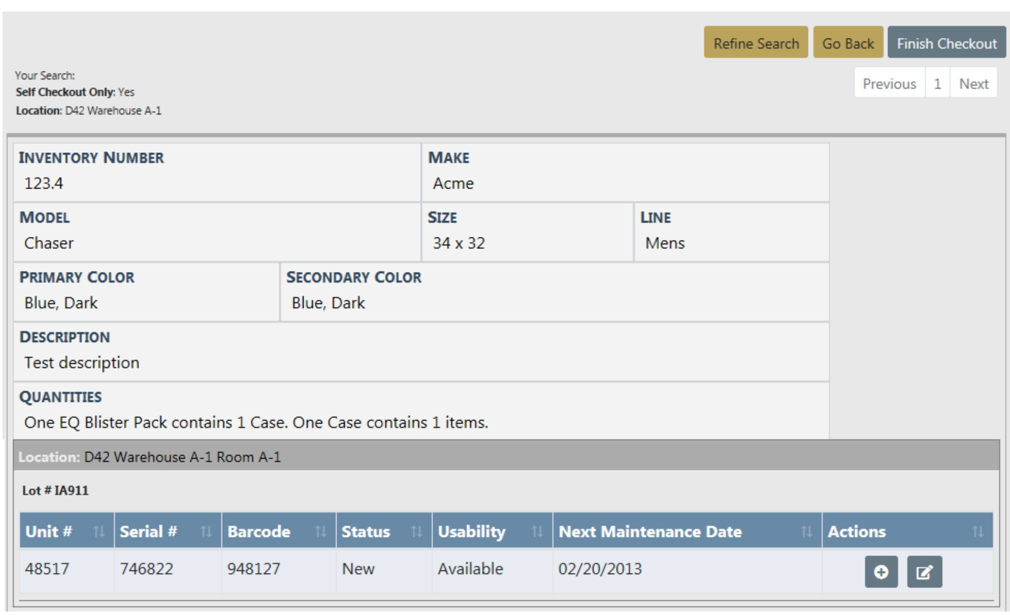
The **Self Checkout** feature addresses the need for specific items to be available on a routine basis. To maintain accountability, items designated by the inventory manager for **Self Checkout** can be checked out and in without manager intervention from Self Checkout locations.

For example, if hand held radar units were assigned to a patrol room and designated as available for **Self Checkout**, anyone with appropriate permissions on any shift can check the radar out and back in as needed.



Inventory can be checked out to both officers and employees with appropriate permissions.

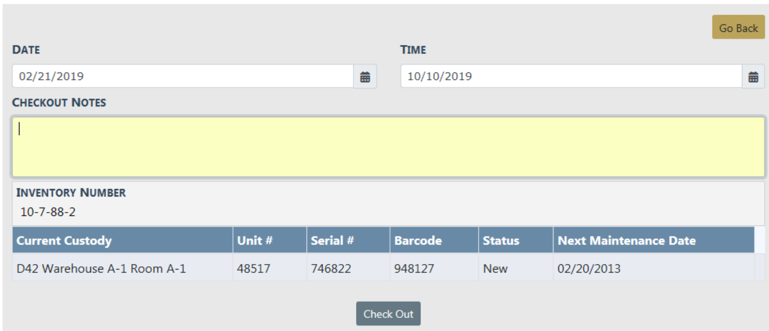
In order to **Self Checkout** an item(s), the inventory manager must make the location of the item available for **Self Checkout**. At a minimum, a location must be selected prior to selecting **Search**. Define the search as needed, select **Search**.



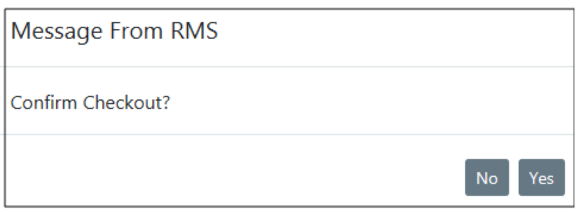
Using the icon, select the item(s) you wish to **Self Checkout**.

Once your selections are complete, select **Finish Checkout**.

Enter any Checkout Notes then select **Check Out**.



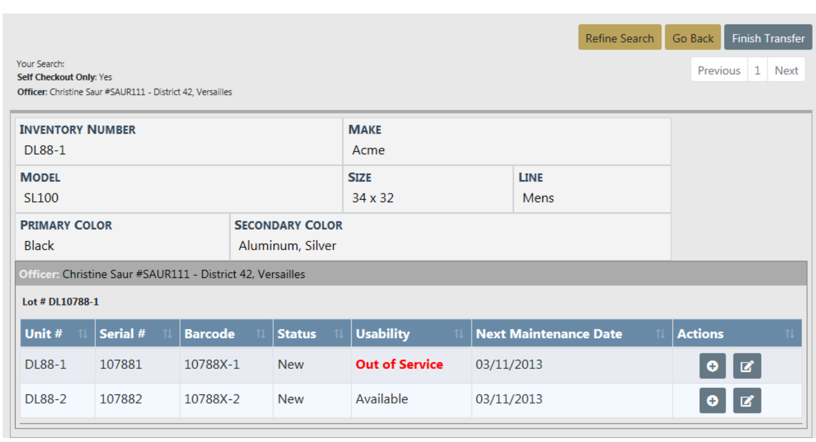
A confirmation message appears. Select the appropriate response.



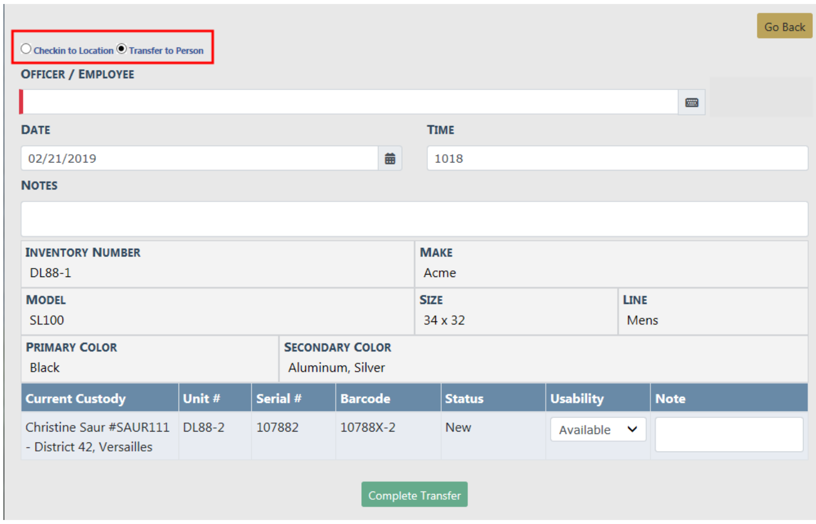
Self Check In / Transfer

From the *Inventory for Officers* page, select **Self Check In / Transfer** to open the *Transfer Items - Search Results*.

The only items available on this screen are those that you had first Self Checked-Out.



Using the icon, select the item you wish to **Self Check-In/Transfer**. Once you have made all the selections, select **Finish Transfer**.

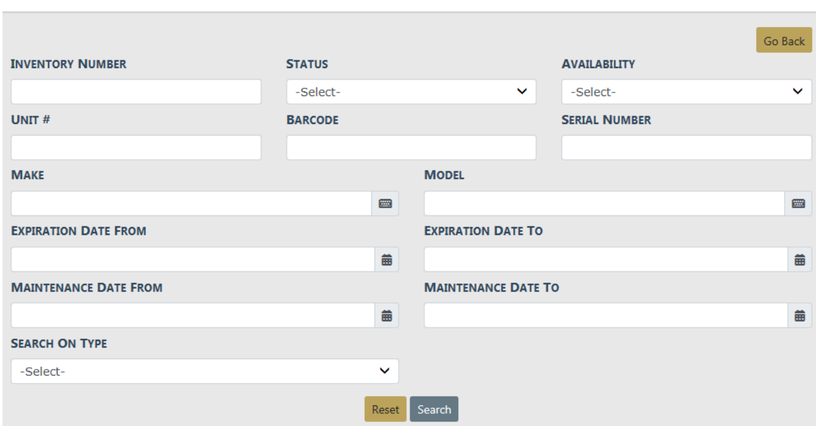


Choose either **Check-In to a Location** or **Transfer to a Person**. Add any notes then select **Complete Transfer**.

You are brought back to the *Inventory for Officers* page.

Dispose Consumable Items

From the *Officer Inventory Management* page, select **Dispose Consumable Items** to open *Inventory Search - Dispose*.



Complete as many fields as you can to narrow your search. Click **Search**.

Click ⊕ to select the items to dispose and click **Finish Disposal**.

Chapter 33. Fleet Management

Overview

The **Fleet Management** module provides the ability to manage ownership costs and service maintenance activities for agency vehicles and equipment assigned for officers' use. Use this module to manage crash reports, track mileage and costs, maintenance history, what is due for maintenance, and submit or manage service requests for needed maintenance or repairs.

This module is available with full subscription access to Online RMS. It is disabled by default but can be enabled, and additional user training is available for purchase. Contact Caliber Public Safety Support for more information.

Fleet Management can be configured specific to your agency's needs, such as an eligible list of equipment and service types, service vendors, allowable vehicle types and categories, inspection types, and more. Refer to the *Online RMS Administrator Guide* for details.

Fleet Management Permission Categories

There are five permission categories tied to the Fleet Management module:

- **Fleet Managers** have the authority to access the Fleet Management Dashboard, create or view fleet vehicles, edit all fleet vehicles and equipment records, manage crash reports, approve service requests, manage vehicle assignments they have created, and create and edit service maintenance records.

  If given the *always-edit assignment* permission, fleet managers can edit assignments created by other users.

  If given the *always-edit fuel & Oil* permission, fleet managers can edit fuel/oil/mileage records created by other users.

  Fleet managers can delete vehicles, only if given specific permissions.

- **Mid-Level Managers** have all the Fleet Manager's permissions except the following: The ability to add vehicles and edit the primary vehicle fields or any custom fields associated with the vehicle.

- **Fleet Officers** view fleet vehicles and equipment currently or previously assigned to them, assign themselves to existing vehicles, create fuel & oil and service requests on vehicles to which they are appointed.

- **Fleet Clerk** views fleet vehicles and add fuel & oil records with mileage, and edit records only if you are the creator and only if within lock hours.

- **Application Administrators** configure the set-up of the module, such as define the eligible list of equipment and service types, vehicle types and categories, service vendors, inspection types, and more. Refer to the *Online RMS Administrator Guide* for details.

Permission categories can be assigned to any role to allow the agency to best manage user access to application modules.

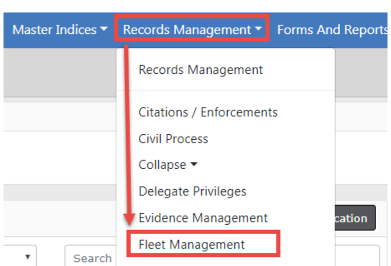
The person with the **Fleet Manager** permission category could also be an **Application Administrator**, or it could be two different people.

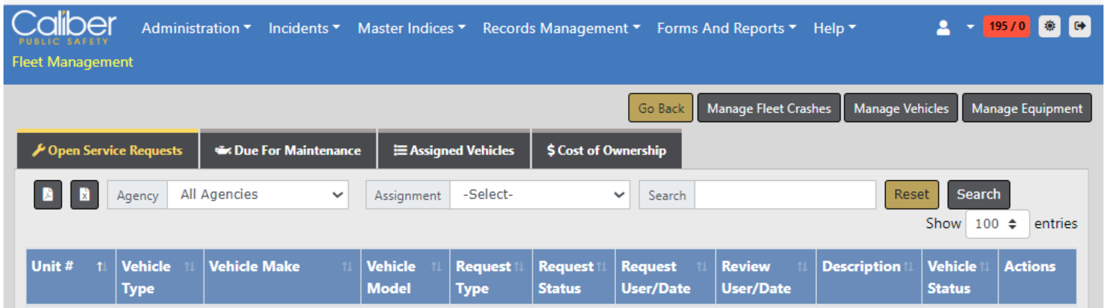
> **Note**: Vehicle Make, Model, Type, and Styles for Fleet Vehicles share admin tables with the *Inventory and Asset Module*. Configure these values at the Organization level. The *Inventory and Asset Module* must be enabled, and the **Application Administrators** must also have the **Inventory_Manager** role. Refer to the *Inventory and Asset* section of the *Online RMS Administrator Guide* for details.

Fleet Manager

Dashboards in the *Fleet Management* section all filter on agency based on the user's search preference setting.

Click on the **Records Management** menu to access the **Fleet Management Dashboard**, an interactive user interface used as a launching pad for viewing and managing fleet data. *Open Service Requests* is shown by default.





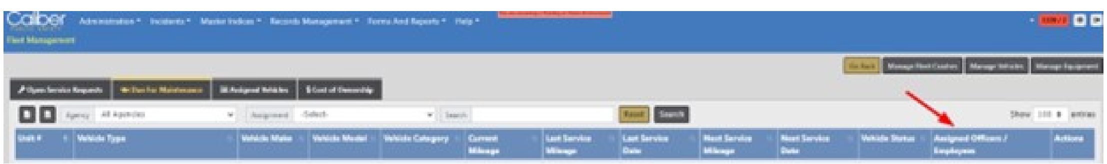
1. There are four tabs that contain existing vehicle information:

The active tab is a different color than the other tabs.

Open Service Requests

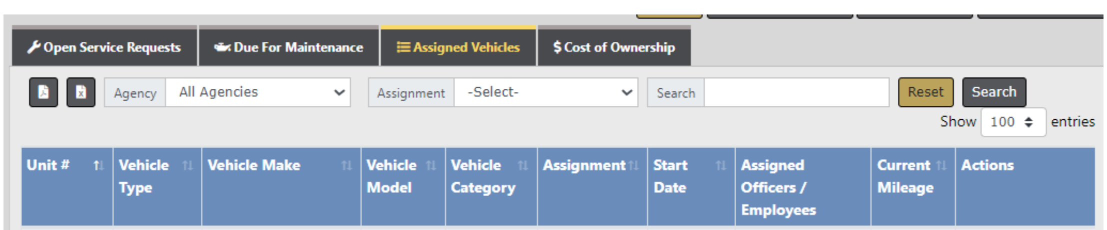
- Vehicles tied to submitted maintenance requests that are pending completion.

Due for Maintenance



- Vehicles that meet set criteria since the last performed service maintenance.

Assigned Vehicles

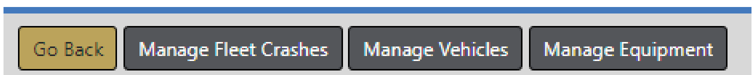


- The tab includes actions for attached custom forms, end open assignments, add fuel/oil mileage records, and select.

Cost of Ownership

- The total cost (purchase price + fuel and oil costs + maintenance and repair costs), total mileage or hours on the vehicle, and the cost per mile or hour. The dashboard defaults to this tab.

2. Four buttons on the top right of the window:



- Click the **Manage Fleet Crashes** button to add, update, or delete fleet crash reports. For details refer to "Manage Fleet Crash Reports" on page 681.

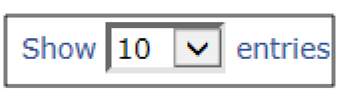
  Note: You can also create or manage a Crash Report under the **Manage Vehicles** option.

- Click the **Manage Vehicles** button to add, update, or delete vehicles. For details refer to "Manage Vehicles" on page 700.

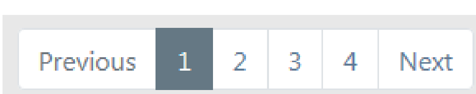
- Click the **Manage Equipment** button to add, update, or delete equipment associated with vehicles. For details refer to "Manage Equipment" on page 694.

- Click the **Go Back** button to return to the dashboard.

3. You can change the number of entries that appear in the grid. Click on the **Show Entries**  and select 10, 25, 50 or 100. The default is 10.

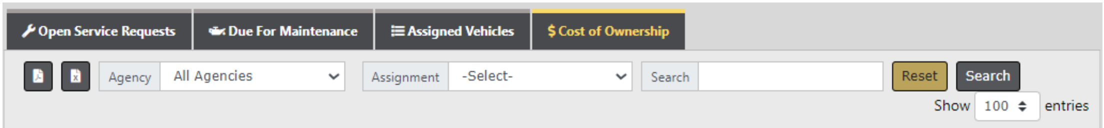


4. The bottom of the window displays the number of entries and it allows you to navigate between pages.



The highlighted number is the page currently being viewed. Click **Next** to advance to the next page, or click the page number you want to view. Click on **Previous** to view the previous page.

5. Each tab allows you to filter the grid data that appears in the grid. Depending on permissions you can filter by agency, assignments, and a specific word or phrase.



a. Click on the tab you want to view, if different than the default **Cost of Ownership**.

b. Select one, two, or all three search options:

- If applicable, optionally select an **Agency** from the list. The results list immediately displays only records pertaining to that selection.

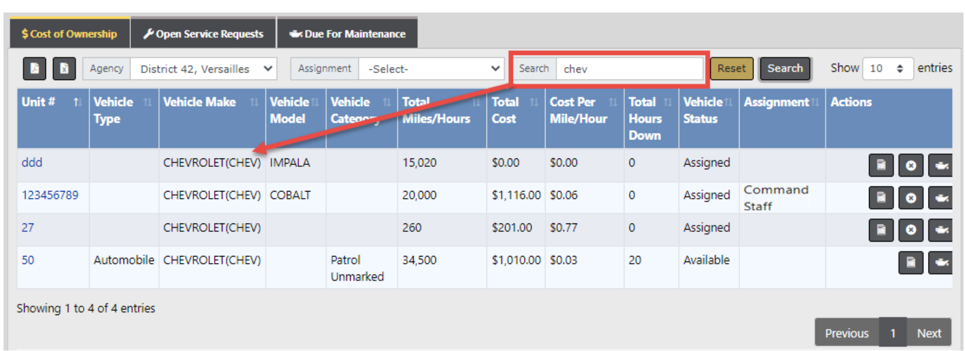
- Optionally, select an **Assignment** from the list. The results list immediately displays only records pertaining to that selection.

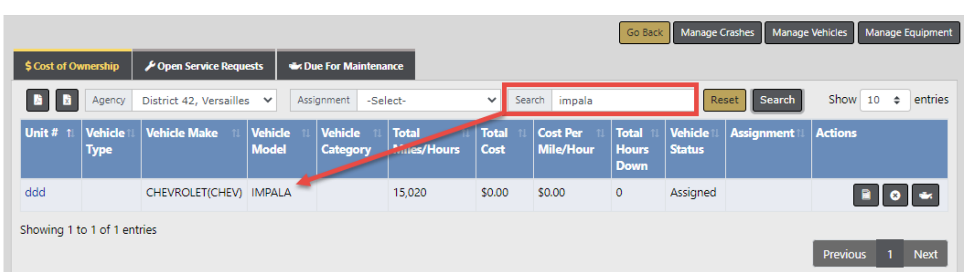
- Optionally, enter text into the **Search** box, then click the **Search** button or press **Enter** to display only records matching the entered text. The displayed list dynamically changes based on the entered text.

Search text example:

On the **Cost of Ownership** tab enter *Chev* in the text box, then click **Search** or press **Enter** to show only records containing *Chev*. Change the text to *Impala* then click **Search** or press **Enter** to display only records containing *Impala*.

Note: Screen captures of tabs herein may refer to previous versions of the software, but the functionality remains the same.

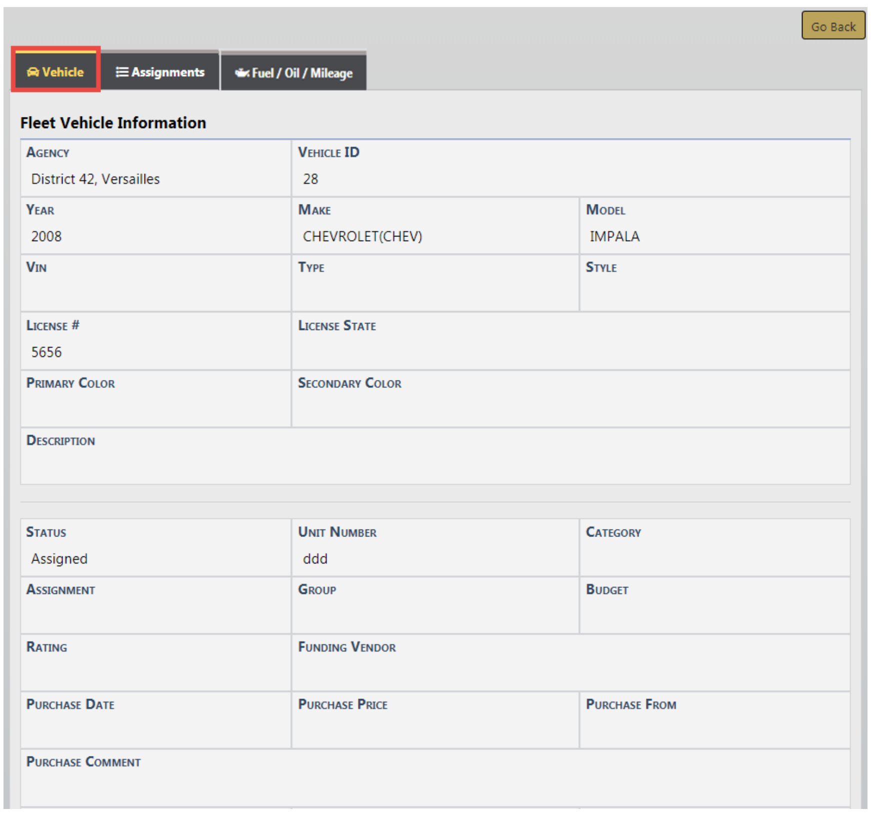




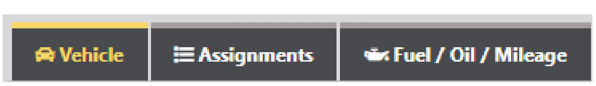
Note: Click the **Reset** button to remove the entered search text and list all available records.

c. Click on the **Unit ID** to open the *View Fleet Vehicle* window for detailed information about that particular vehicle.

Unit #	Vehicle Type	Vehicle Make	Vehicle Model	Vehicle Category
123456789		CHEVROLET (CHEV)	COBALT	
ddd		CHEVROLET (CHEV)	IMPALA	
dmm3		CHEVROLET (CHEV)	CAMARO	Van



The *View Fleet Vehicle* window contains three tabs:



Vehicle

- Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. The *View Fleet Window* opens to this tab by default as shown in the above image.

Assignments

- A history of officers or employees who are non-officers assigned to the vehicle, including dates.

Fuel/Oil/Mileage

- Summarization of fluid types and the dates and costs with mileage.

d. Click on the **Back** button to return to the **Dashboard**. For your convenience, this button is located on the upper right of the window and on the lower center of the window; either will return you to the **Dashboard**.

Manage Fleet Crash Reports

The **Manage Fleet Crashes** button on the **Fleet Management Dashboard** allows Fleet Managers to *Search, Add*, *Edit*, or *Delete* fleet crash report data.

To update or delete crash reports you must first search for the crash record. Depending on permissions, the search results provide the option to update, delete, or view the crash data. The search page also provides the option to create a new crash report.

Note: The **Manage Fleet Crashes** button only appears if you have appropriate permissions.

Note: With appropriate permissions, you can also create or manage Crashes from the *Edit Fleet Vehicle* screen. Refer to "Edit Vehicles " on page 711 for details.

Search Fleet Crash Reports

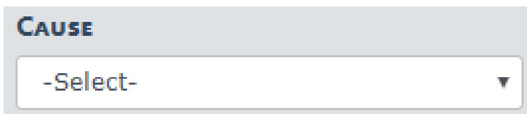
1. Click on the **Manage Fleet Crashes** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

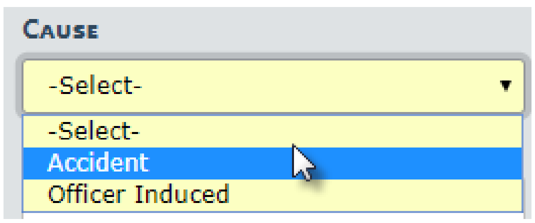
2. The *Crash Search* screen appears. Enter various pieces of information about the crash report such as, status, cause, dates, crash report number, vehicle id, etc.

Note: The Agency of the crash report defaults to the Fleet Manager's agency; however, with proper permissions you can change it to any agency within your organization by selecting from the drop down list.

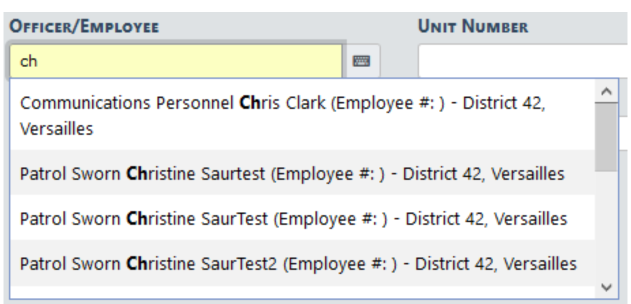
To add a crash report, click the **Add Fleet Crash** button on the top right of the screen. For instructions on adding a crash report refer to "Add Crash Report" on the facing page.

The fields with **-Select-** supply a specific list from which to choose. For example, to search for a **Cause** click in the field and select from the drop down list.





The fields with an  on the right supply a list of available values based on data you type in the field. For example, click into the **Officer/Employee** field and type a portion of the name to view a list that matches your entered text, then click on an option from the list to populate the Officer/Employee field.

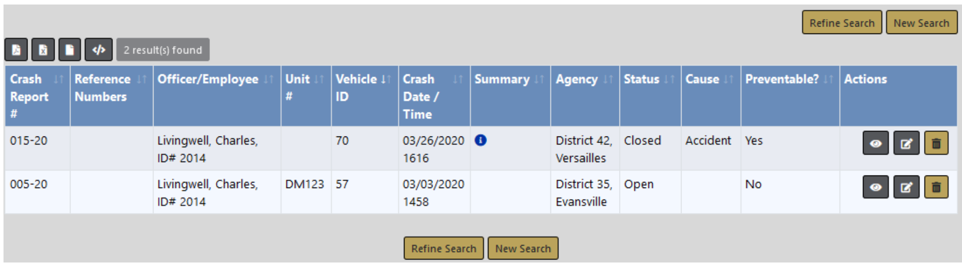


Note You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

Select any applicable check boxes that apply to the search. For example, select **On Traffic** Stop to search for crash report that pertain to traffic stops.

3. Either click **Reset** to clear all fields to start over, click **Go Back** to return to the Fleet Management dashboard, click **Search** to display a list of existing crashes that match the entered data.

   If you selected **Search**, the results display in a grid.



Refine Search New Search

2 result(s) found

Crash Report #	Reference Numbers	Officer/Employee	Unit #	Vehicle ID	Crash Date / Time	Summary	Agency	Status	Cause	Preventable?	Actions
015-20		Livingwell, Charles, ID# 2014		70	03/26/2020 1616		District 42, Versailles	Closed	Accident	Yes	
005-20		Livingwell, Charles, ID# 2014	DM123	57	03/03/2020 1458		District 35, Evansville	Open		No	

Refine Search New Search

   Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over. Click on the Crash Report Number of the crash record to view details, or click on the *View* icon on the right.

4. To export the search results to a file, refer to "Export Search Results" on page 36.

Add Crash Report

Fleet Managers, with proper permissions, have the ability to add crash reports to fleet vehicles.

There are two ways to initiate a new crash report:

- From the *Crash Search* page.
- From the fleet vehicle record.

Perform the following steps to add a crash report:

1. Access the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. Choose one of the following methods to initiate a new crash report:

   From the Crash Search page:

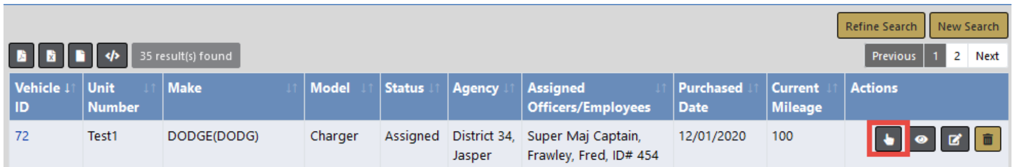
   a. Click on the **Manage Fleet Crashes** button on the **Fleet Management Dashboard** to open the *Fleet Crash Search* page.

   b. Click on the **Add Fleet Crash** button.

   c. The *Vehicle Search* page opens.

   d. Search for the vehicle record that you want to associate with the crash report. For more information on searching for a vehicle record, refer to "Search Vehicles " on page 700.

e. Click the *Select* icon on the appropriate vehicle record in the results grid to add the vehicle to the new crash report.



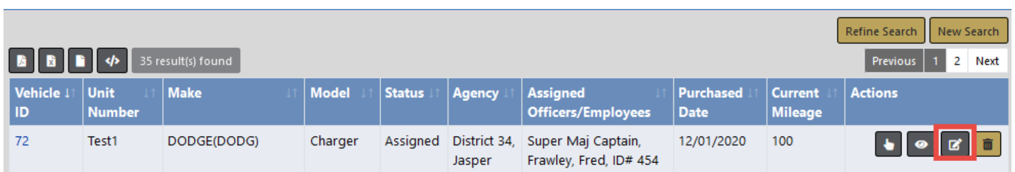
f. The *Edit Fleet Crash* page opens.

From the Fleet Vehicle:

a. Click on the **Manage Vehicle** button on the **Fleet Management Dashboard** to open the *Vehicle Search* page.

b. Search for the vehicle record that you want to associate with the crash report. For more information on searching for a vehicle record, refer to "Search Vehicles " on page 700.

c. In the *Fleet Vehicle Search Results* grid, click the *Edit* icon on the vehicle you want to associate with the new crash report.



d. The *Edit Vehicle* page opens.

e. On the *Edit Vehicle* page, **page down** to the *Crashes* section of the fleet vehicle record.

f. Click on the **Add Fleet Crash** link located on the top right of the *Crashes* section.

g. Click on the **Yes** button when asked if you want to continue.

h. The *Edit Crash* page appears.

3. Enter the relevant information on the *Edit Crash* page, then click **Update**.

For more information on the *Edit Crash* page, refer to "Edit Crash Report" on page 686.

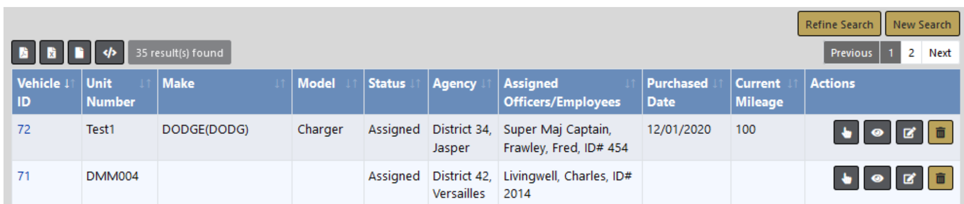
Delete Crash Report

To delete a crash report you must first **Search** for the crash report. The **Search Results** will provide the option to delete.

1. Click on the **Manage Fleet Crashes** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. The *Crash Search* screen appears. Search for the crash report you want to delete. For instructions on how to search, refer to "Search Fleet Crash Reports" on page 681.

   Example of search results:

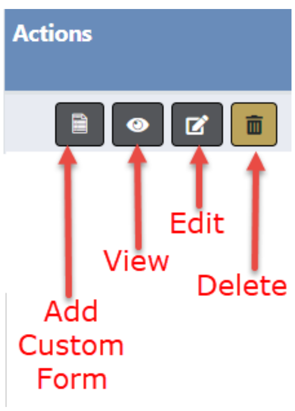


Refine Search | New Search

35 result(s) found | Previous 1 2 Next

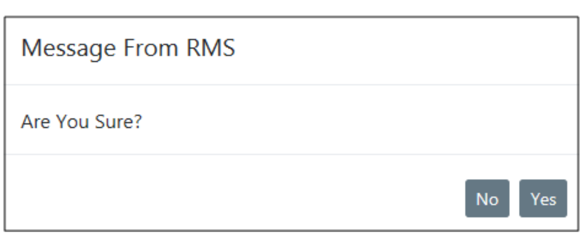
Vehicle ID	Unit Number	Make	Model	Status	Agency	Assigned Officers/Employees	Purchased Date	Current Mileage	Actions
72	Test1	DODGE(DODG)	Charger	Assigned	District 34, Jasper	Super Maj Captain, Frawley, Fred, ID# 454	12/01/2020	100	
71	DMM004			Assigned	District 42, Versailles	Livingwell, Charles, ID# 2014			

   The icons on the right allow you to *Edit*, *View*, or *Delete*.



Note: If you do not see the delete icon, then you do not have appropriate permissions to do so.

3. Click on the trash icon  to delete the appropriate equipment. The confirmation screen appears.



4. Click **Yes** to delete or **No** to return to the results window without deleting.

Edit Crash Report

Fleet Managers, with proper permissions, have the ability to edit crash reports.

There are two ways to access the *Edit Fleet Crash* page:

- By searching for a specific crash report using the *Crash Search* page.
- From the fleet vehicle itself.

Perform the following steps to edit a crash report:

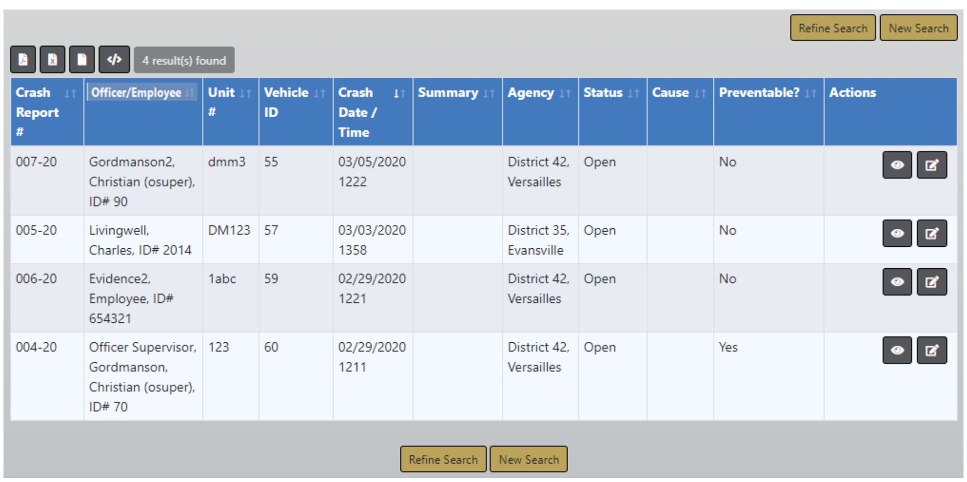
1. Access the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 676.
2. Choose one of the following methods to access the *Edit Fleet Crash* page:

From the *Crash Search* page:

a. Click on the **Manage Fleet Crashes** button on the **Fleet Management Dashboard**.

b. The *Crash Search* screen appears. Search for the crash report you want to update. For instructions on how to search, refer to "Search Fleet Crash Reports" on page 681.

Search results example:



Crash Report #	Officer/Employee	Unit #	Vehicle ID	Crash Date / Time	Summary	Agency	Status	Cause	Preventable?	Actions
007-20	Gordmanson2, Christian (osuper), ID# 90	dmm3	55	03/05/2020 1222		District 42, Versailles	Open		No	
005-20	Livingwell, Charles, ID# 2014	DM123	57	03/03/2020 1358		District 35, Evansville	Open		No	
006-20	Evidence2, Employee, ID# 654321	1abc	59	02/29/2020 1221		District 42, Versailles	Open		No	
004-20	Officer Supervisor, Gordmanson, Christian (osuper), ID# 70	123	60	02/29/2020 1211		District 42, Versailles	Open		Yes	

From the Fleet Vehicle:

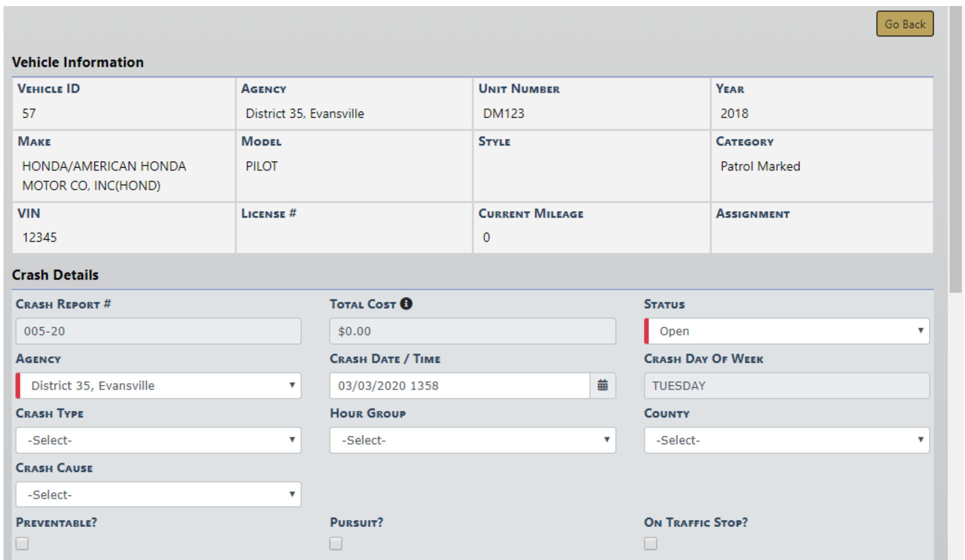
a. Search for the vehicle and click the edit icon to update the vehicle record. For more information on searching for a vehicle record, refer to "Edit Vehicles " on page 711.

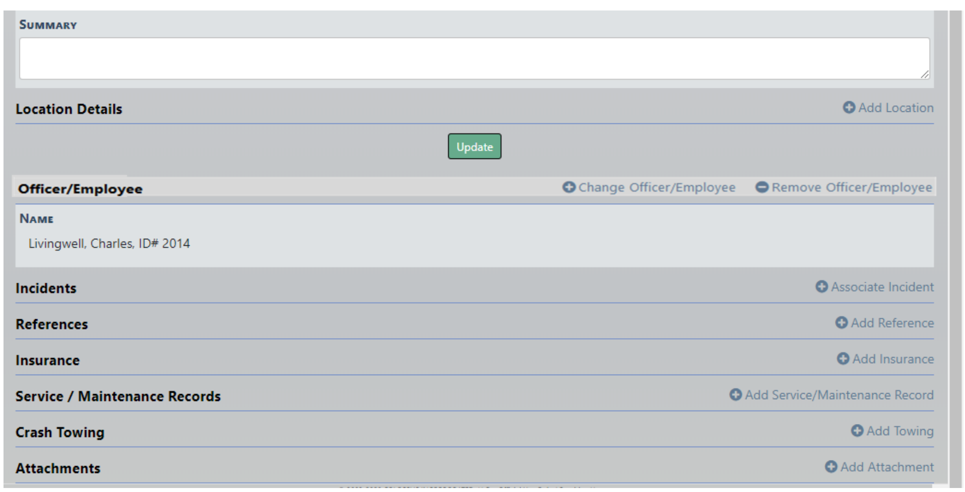
b. On the *Edit Vehicle* screen, page down to the *Crashes* section of the fleet vehicle record.

Crashes ⊕ Add Crash

Crash Report #	Crash Type	Crash Cause	Status	Officers/Employees	Preventable	Crash Date / Time	Summary	Actions
010-20			Open		No			
005-20			Open	Livingwell, Charles, ID# 2014	No	03/03/2020 1358		

3. Click the edit icon  on the crash report you want to update. The *Edit Crash* form opens.





Note: Data in the *Vehicle Information* section comes directly from the fleet vehicle record and cannot be modified.

Note: **Total Cost** is read-only and it calculates automatically: Tow costs + service/maintenance costs.

Crash Details

1. Modify the necessary information in the *Crash Details* section, then click the **Update** button to save.

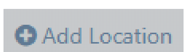
Note: Fields that are grayed-out cannot be modified.

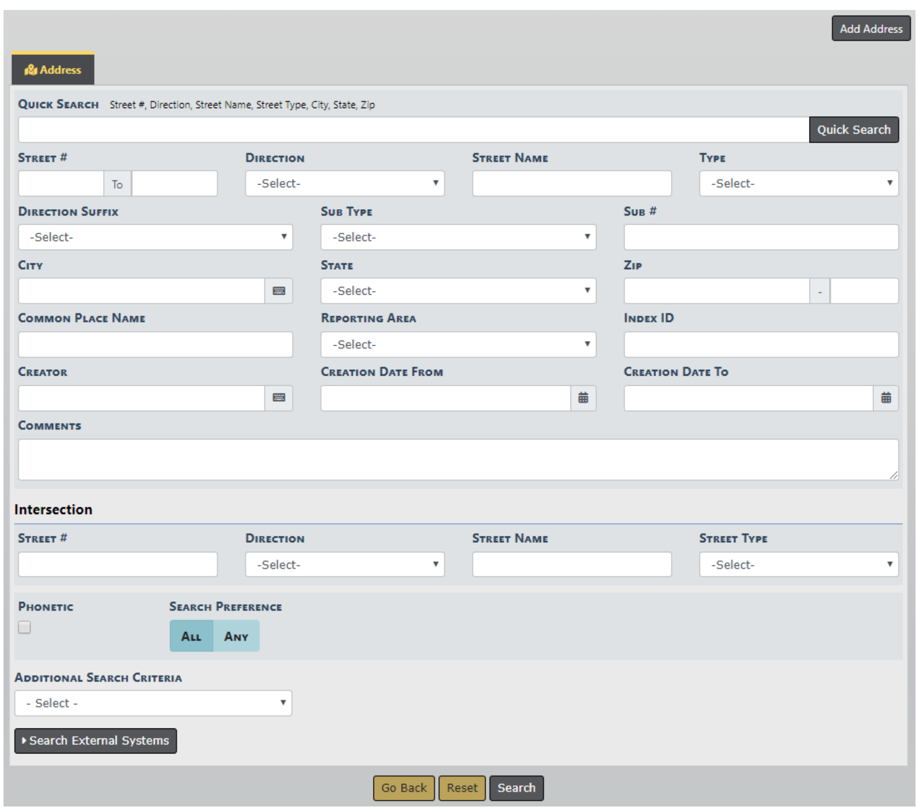
Location

1. Optionally, search for and choose an existing address.

Note: The location must exist in the Master Address Index. If the location doesn't exist, with proper permissions, you can add it to the Master Address Index then select the newly added record. For more information on Master Index, refer to "Master Indices Overview" on page 83.

   a. Click **Add Location** to open *Location Search*.

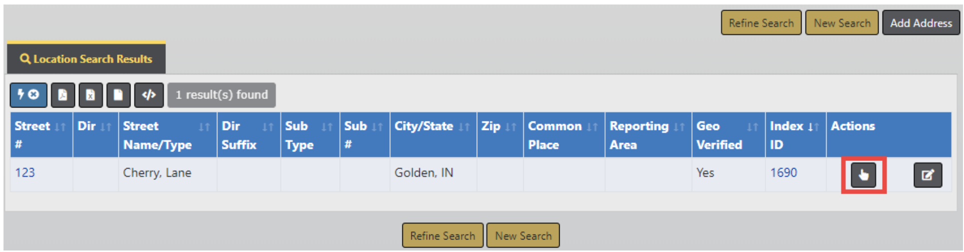




b. Enter as much information as possible to find the address record, then click the **Search** button to display results that match your entered criteria.

For more information on searching address records, refer to the *Address Search* section of "Searching Master Records" on page 87.

c. Click on the select icon to select the appropriate address record that appears in the grid.



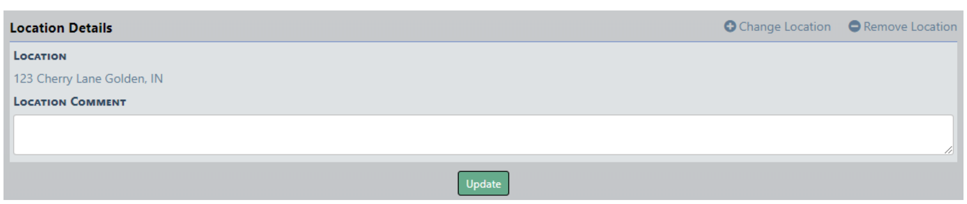
When address you need does not exist:

When the address you are looking for does not exist in the system, you can, with appropriate permissions, add the record then select it.

Click on the **Add Address** button on the top right to add a new address record. If the button does not appear on your screen, then you do not have appropriate permissions.

For more information on adding an address record, refer to "Adding Address" on page 109.

d. The address is added to the *Location Details* grid of the Crash Report.



e. Optionally, enter **Location Comments** then click on the **Update** button to save.

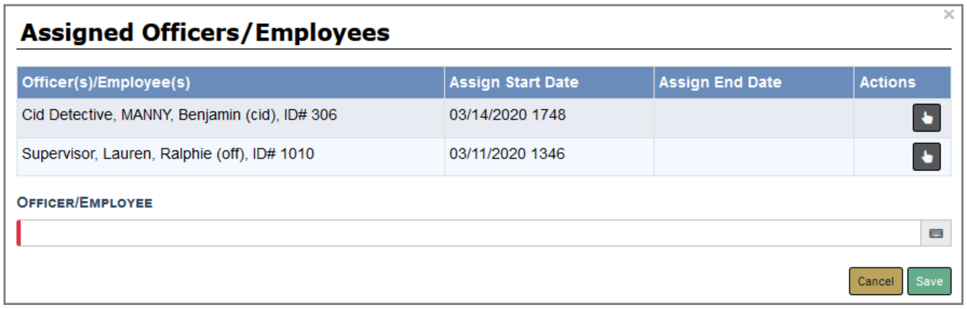
f. Click the **Change Location** link to change the address, if applicable. The link open the *Address Search* form.

g. Click the **Remove Location** link to remove the location and location comment from the grid, if applicable. Then confirm deletion.

Officer/Employee

1. Click on the **Add Officer/Employee** or **Change Officer/Employee** link, whichever applies.

2. The *Assigned Officers/Employee* windows appears.



Officers/employees assigned or previously assigned to the vehicle the past twelve months appear in the list.

3. Select the appropriate officer/employee from the list provided.

4. Click **Save**.

To remove an officer/employee, click on the delete icon then confirm deletion.

Associate Incident

1. If applicable, click on the **Associate Incident** link to associate the crash report with an incident.

2. The *Incident Search* window opens. Enter the search criteria and click the **Search** button to display the results, then select the appropriate incident from the results grid. For more information on searching for incidents, refer to "Incident Search" on page 270.

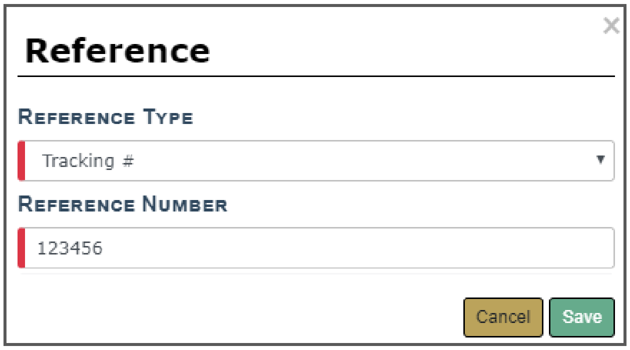
3. To remove an associated incident from the crash report, click the delete icon then confirm deletion.

   If the delete icon is not present, then you do not have appropriate permissions.

   Note: This removes the association to the incident from the crash report; it does not remove the incident from the system.

References

1. If applicable, click on the **Add Reference** link to include a reference.



2. Select the **Reference Type**.

3. Enter the **Reference Number**.

4. Click **Save** to add it to the crash report.

5. To edit a reference record, click on the edit icon , make changes, then click **Save**.

6. To delete a reference record, click on the delete icon , then click **Yes** to confirm deletion.

Insurance

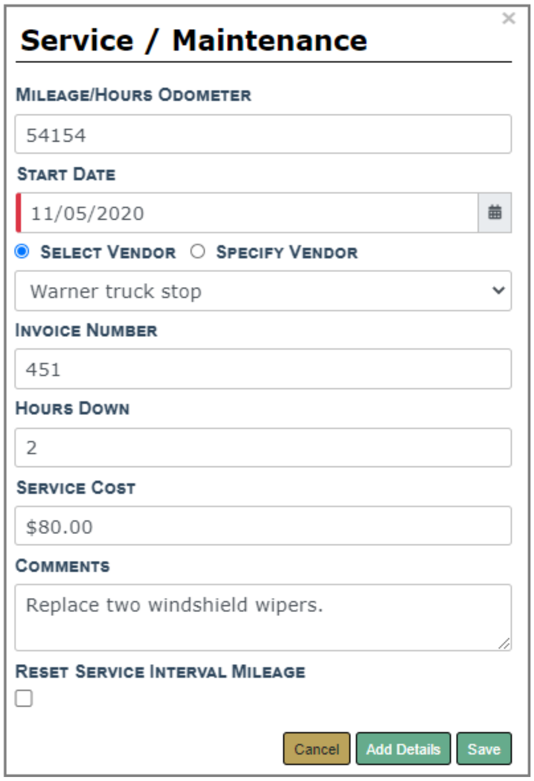
1. If applicable, click on the **Add Insurance** link to add insurance to the crash report. The *Insurance* window opens.

2. Enter the information, then click **Save**.

Service/Maintenance Records

1. If applicable, click on the **Add Service/Maintenance** link to add service/maintenance to the crash report. The *Service/Maintenance* window opens.

2. Enter the values into the Service/Maintenance window.

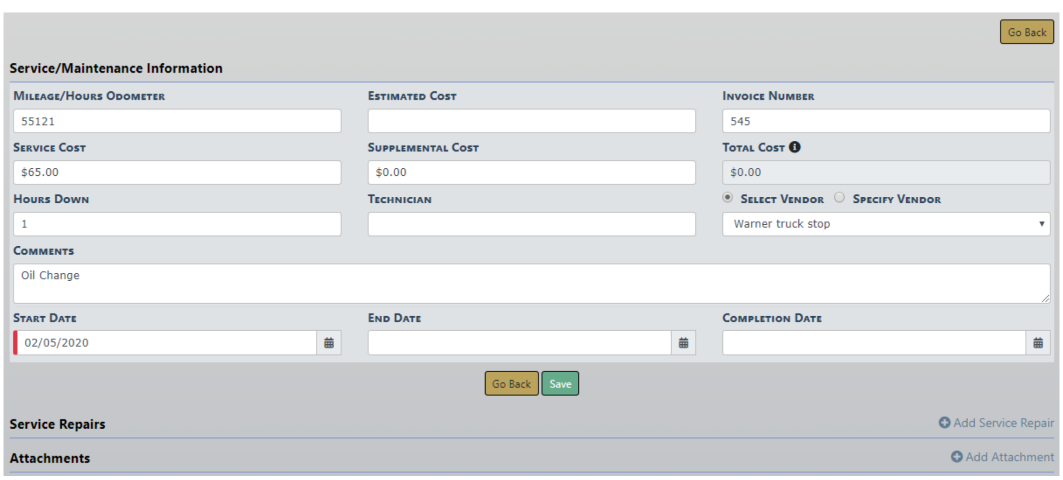


Note: Any field with a red left-hand border is a required field. You must complete required fields to continue.

For vendor, **Select Vendor** from a list or click **Specify Vendor** enter your own.

3. Click **Save** to create the **Service Maintenance** record, **Cancel** to return to the **Edit Fleet Vehicle** window without saving, or click **Add Details** to add **Service Repair** records.

4. If you chose to **Add Details**, the *Edit Service Record* appears.



Note: Items specific to crash reports:

- Maintenance records created within a crash report are only visible within the crash report, not in the Service Maintenance grid on the fleet vehicle itself.
- Costs associated with service maintenance records within a crash report are not included in the Cost of Ownership on the fleet vehicle itself.
- Mileage associated with the service maintenance records within a crash report are not used when determining Next Service Mileage and Next Service Date on the fleet vehicle itself.

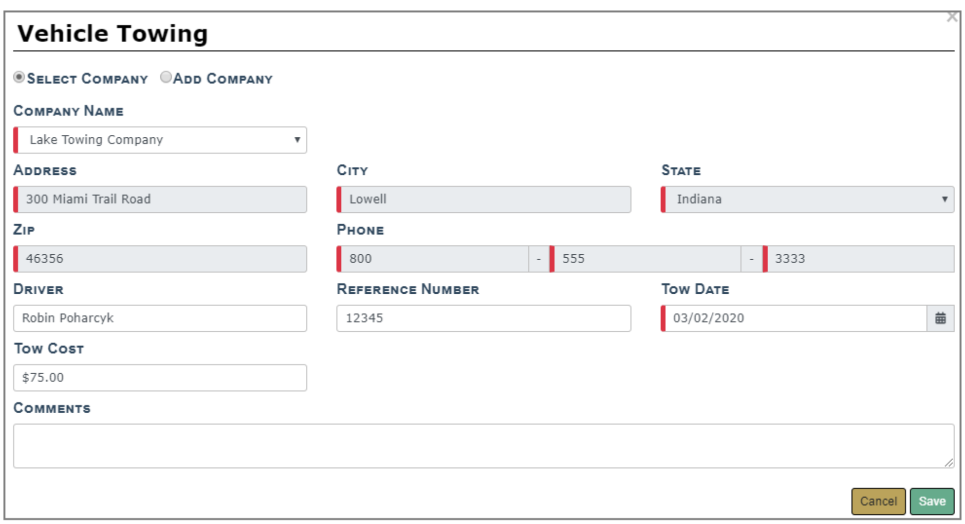
5. To edit an existing service/maintenance record on the crash report, click on the edit icon , make changes, then click **Save**.

6. To delete a service/maintenance record from the crash report, click on the delete icon , then click **Yes** to confirm deletion.

Crash Towing

1. If applicable, click on the **Add Towing** link to add towing to the crash report. A *Vehicle Towing* window opens.

2. You can **Select Company** then choose from a drop-down list, or **Add Company** and complete the necessary information.



3. Click **Save** to add the towing record to the crash report.

4. To edit an existing towing record on the crash report, click on the edit icon , make changes, then click **Save**.

5. To delete a towing record from the crash report, click on the delete icon , then click **Yes** to confirm deletion.

Attachments

1. If applicable, click on the **Add Attachment** link to attach a photo or document to the crash report.

   For more information on adding attachments, refer to "Add Attachments" on page 69.

   For general information about attachments, refer to "Attachments Overview" on page 69.

Manage Equipment

The **Manage Equipment** button on the **Fleet Management Dashboard** allows Fleet Managers to *Search, Add*, *Edit*, and *Delete* equipment data. Equipment examples are handcuffs, shotguns, radar guns, etc.

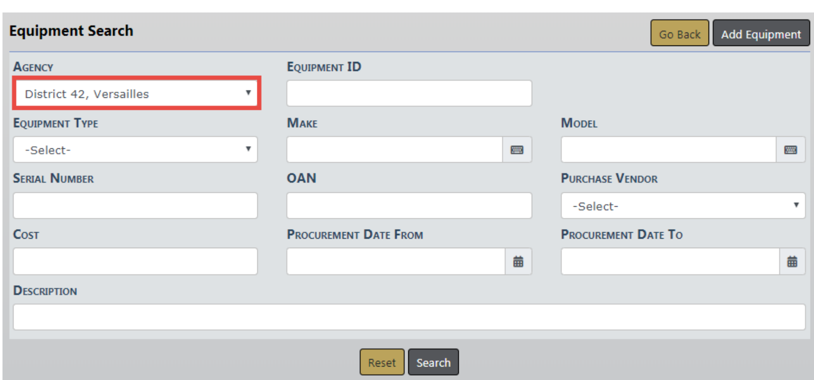
To update or delete equipment you must first search for the equipment record. The search results will provide the option to update, delete, or view the equipment data.

Search Equipment

1. Click on the **Manage Equipment** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

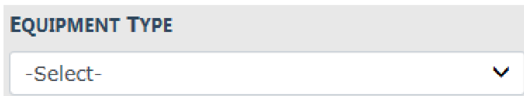
2. The **Fleet Equipment Search** screen appears. Enter various pieces of information about the equipment such as, equipment type, make, model, etc.

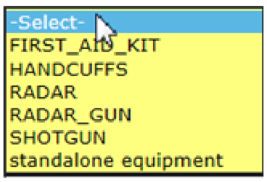
   Note: The Agency of the equipment defaults to the Fleet Manager's agency; however, with proper permissions you can change it to any agency within your organization by clicking on the .

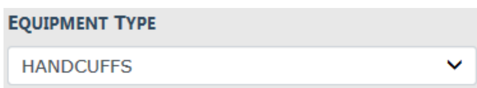


To add equipment click the **Add Equipment** button. For instructions on adding equipment refer to "Add Equipment " on the next page.

The fields with **-Select-** supply a specific list from which to choose. For example, to search for the **Equipment Type** *Handcuffs*, click on the and a list will appear, then click *Handcuffs* from the list.

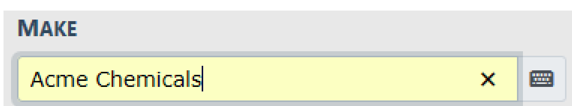






NOTE: Equipment Types are unique per Organization.

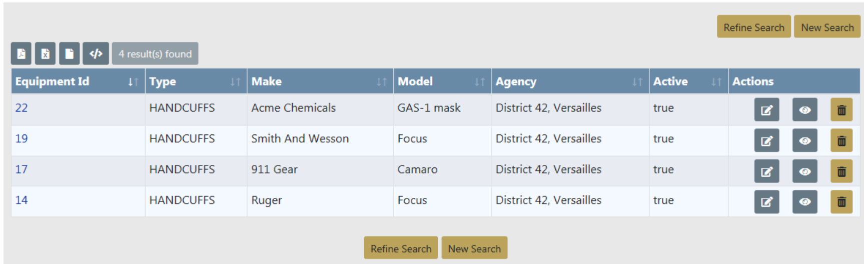
The fields with an on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *Acme* to view a list of *Acme* options from which to choose, then click on the option you want and it appears in the **Make** field.



Note You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

3. Either click **Reset** to clear all fields to start over, click **Back** to return to the Fleet Management dashboard, click **Search** to display a list of existing equipment that matches the entered data, or **Add Equipment** to add the equipment to the database.

   If you selected **Search**, the results display in a grid. The example below is a search result for **Equipment Type** *Handcuffs* and **Agency** *District 42, Versalles*.



Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over. Click on the Equipment ID of the equipment record to view details, or click on the *View* icon on the right.

4. To export the search results to a file refer to "Export Search Results" on page 36.

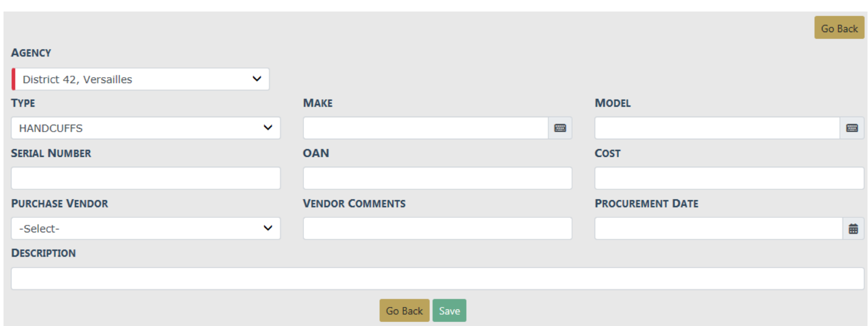
Add Equipment

Fleet Managers have the ability to add equipment to the Fleet Management module by way of the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

1. Click on the **Manage Equipment** button on the **Fleet Management** dashboard.

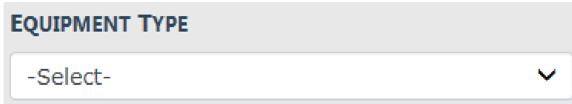
2. The **Fleet Equipment Search** screen appears. Before adding the equipment, it is recommended you first search for the equipment to verify whether or not it already exists, though not required. For instructions on how to search for equipment refer to "Search Equipment " on page 694.

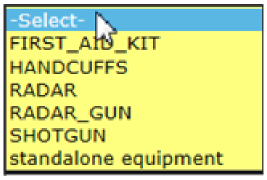
3. Click on the **Add Equipment** button on the **Fleet Equipment Search** window. Enter the Equipment information in the fields provided.

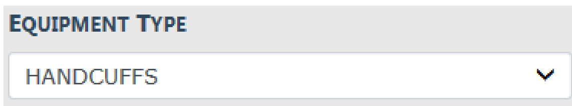


- The **Agency** of the equipment defaults to the Fleet Manager's agency; however, you can change it to any agency within the organization by clicking on the .

- The fields with **-Select-** supply a specific list from which to choose. For example, to search for the **Equipment Type** *Handcuffs*, click on the and a list will appear, then click *Handcuffs* from the list.

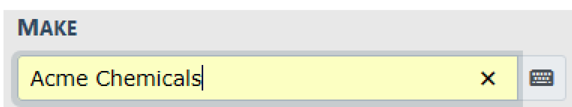






Note: Equipment Types are unique per Organization. The list of available **Styles** dynamically changes based on the chosen **Type**.

- The fields with an  on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *Acme* to view a list of *Acme* options from which to choose, then click on the option you want and it appears in the **Make** field.

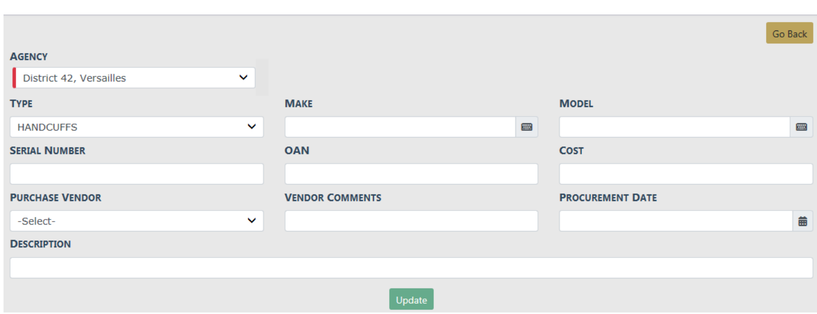


Note You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

Note: The list of available **Models** dynamically changes based on the chosen **Make**.

4. Click **Save** to create the Equipment record, or click **Go Back** to return to the **Fleet Equipment Search** screen without creating the record.

   When you select **Save**, the **Edit Equipment** screen displays.



5. Click **Go Back** to return to the **Fleet Equipment Search** screen.

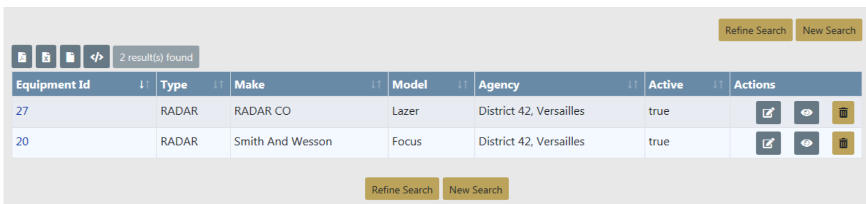
Delete Equipment

To delete equipment you must first **Search** for the equipment. The **Search Results** will provide the option to delete the equipment data.

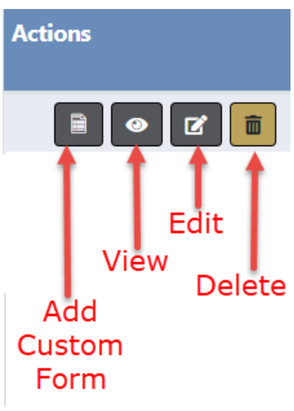
1. Click on the **Manage Equipment** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. The **Fleet Equipment Search** screen appears. Search for the equipment you want to delete. For instructions on how to search for equipment refer to "Search Equipment " on page 694.

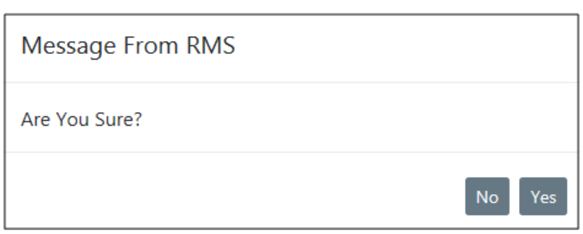
   The results below are based on a search for equipment type Radar.



   The icons on the right allow you to *Edit*, *View*, or *Delete*.



3. Click on the trash icon to *Delete* the appropriate equipment. The following confirmation screen appears.



4. Click **Yes** to delete or **No** to return to the results window without deleting.

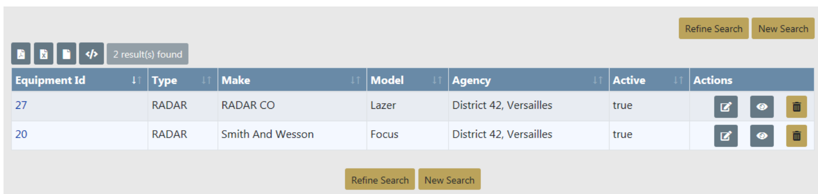
Edit Equipment

To edit equipment you must first **Search** for the equipment. The **Search Results** will provide the option to edit the equipment data.

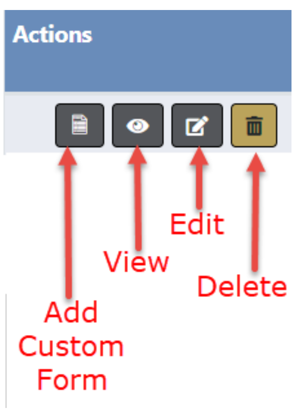
1. Click on the **Manage Equipment** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. The **Fleet Equipment Search** screen appears. Search for the equipment you want to update. For instructions on how to search for equipment refer to FleetManagerManageEquipSearch.htm.

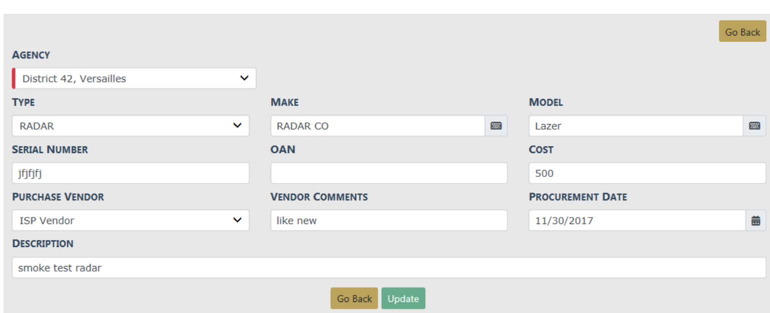
   The results below are based on a search for equipment type Radar.



   The icons on the right allow you to *Edit*, *View*, or *Delete*.



3. Click the *Edit* icon on the equipment record you want to update and the **Edit Equipment** form opens.



4. Modify the necessary information then click the **Update** button to save.

5. Click **Go Back** to return to the **Fleet Equipment Search** screen.

Manage Vehicles

The **Manage Vehicles** button on the **Fleet Management Dashboard** allows Fleet Managers to *Search, Add*, *Edit*, and *Delete* vehicle data.

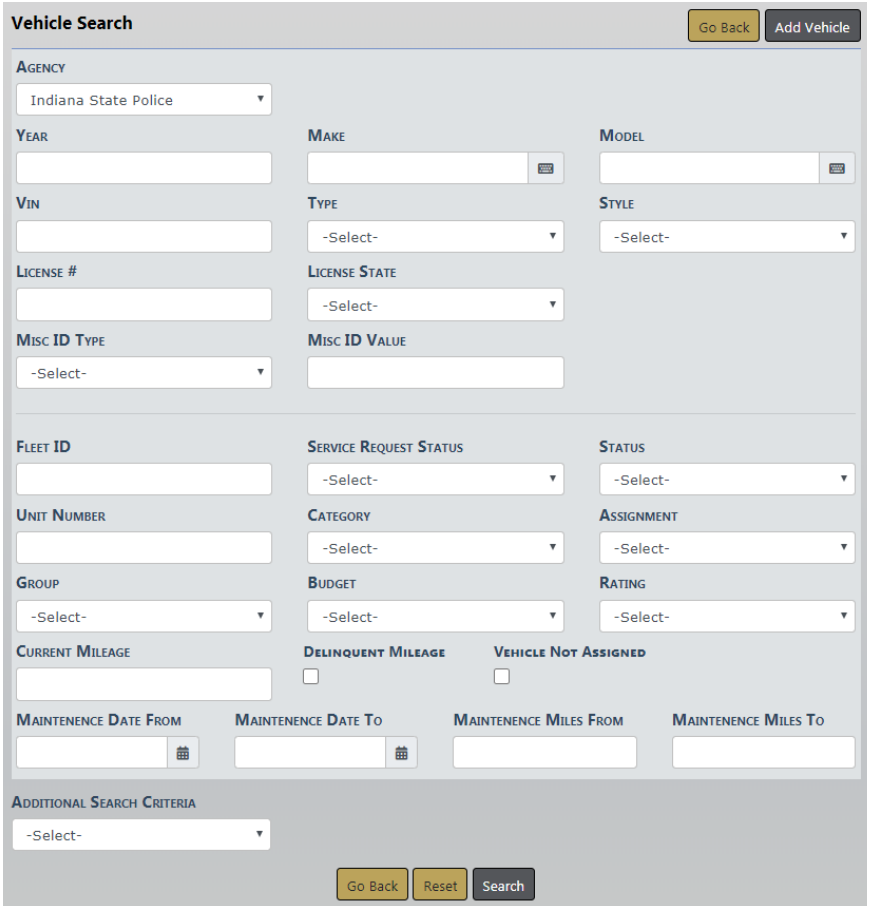
To update or delete vehicles you must first search for the vehicle. The search results provide the option to update, delete, or view fleet vehicle data.

Search Vehicles

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

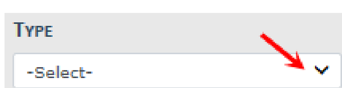
2. The **Fleet Vehicle Search** screen appears. Enter various pieces of information about the vehicle, such as VIN, Make, Model, etc.

   Note: The Agency of the vehicle defaults to the Fleet Manager's agency; however, with proper permissions you can change it to any agency within the organization by clicking on the  .



To add a vehicle click **Add Vehicle**. For details refer to "Add Vehicles " on page 706.

The fields with **-Select-** supply a specific list from which to choose. For example, to search for a vehicle **Type** of *Automobile* click on the and a list will appear, then click *Automobile* from the list and it appears in the field.



Note: The list of available **Styles** dynamically changes based on the chosen **Type**.

The fields with an on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *chev* to view a list of *chev* options from which to choose, then click on the option you want and it appears in the **Make** field.

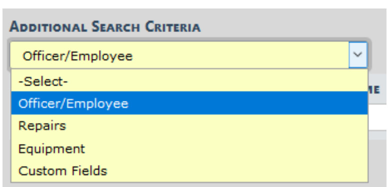
Note You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

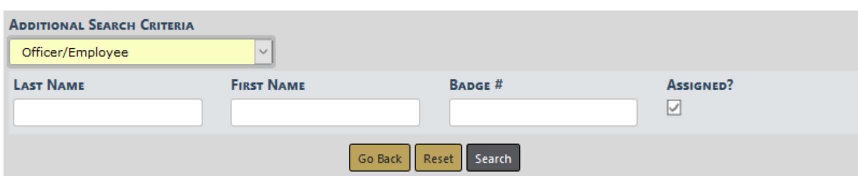
Note: The list of available **Models** dynamically changes based on the chosen **Make**.

Check the **Vehicle Not Assigned** checkbox to search for vehicles that have not been assigned.

You can also reduce your search results by including **Additional Search Criteria**, along with your other search parameters or by themself, by using the drop-down list at the bottom left of the *Fleet Vehicle Search* screen. For example, you can search for all *Chevrolet* vehicles assigned to officers by selecting **Officer/Employee** in the **Additional Search Criteria** drop-down, then check the **Assigned?** box if not already checked when the name fields appear. You can also optionally add name or badge information. Click **Search** to display the results or click **Reset** to begin the search over.

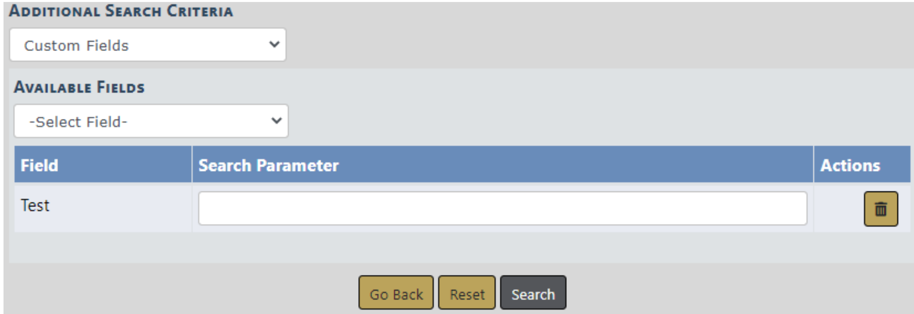
Note: The Officer search option searches both officer and employee records to accommodate assignments where employees are not officers.





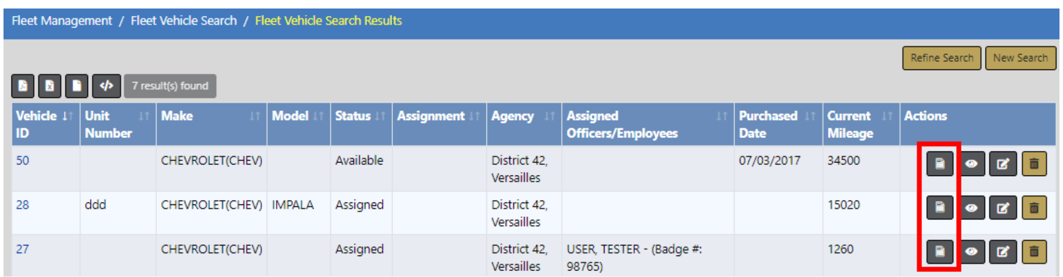
You can also search **Custom Fields** if configured by your agency. The **Available Fields** appears; click in the field and choose from the drop-down list.

Then enter the **Search Parameter** at the prompt and click **Search**.



Note: Custom Fields is available for agencies that have the Custom Fields feature enabled. Custom Fields captures data defined by the agency. For more information refer to your administrator.

3. The search results display.



4. When the search results display, either click **Refine Search** to update your current search criteria or click **New Search** clear all fields to start over.

   Click on the **Vehicle ID** of the vehicle record to view details, or click on the View icon  on the right.

   Click on the Add Custom Forms icon  to easily add custom forms to the fleet vehicle.

   For more information, refer to "Add Custom Forms to Fleet Vehicle and Assignments" below.

5. To export search results to a file refer to "Export Search Results" on page 36.

Add Custom Forms to Fleet Vehicle and Assignments

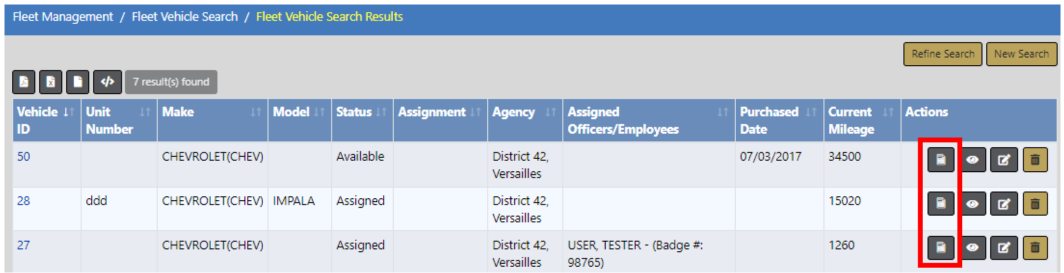
Your agency administrator controls whether or not Custom Forms are available for selection on Fleet Vehicle or Fleet Vehicle Assignments. For more information on availability of Custom Forms, refer to your agency administrator.

To Add a Custom Form to a Fleet Vehicle

1. Choose one of the following options.

Option 1

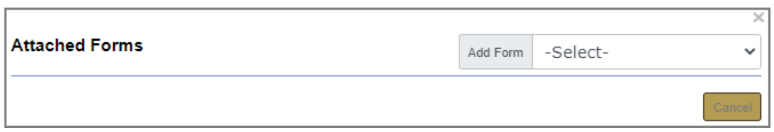
a. Access *Manage Vehicles* > *Fleet Vehicle Search* > *Fleet Vehicle Search Results*.



For details on accessing *Manage Vehicles*, refer to "Fleet Manager" on page 676.

b. Click the Add Custom Forms icon .

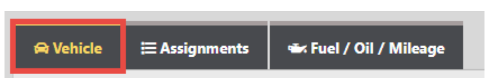
c. Select the available Custom Form from the list.



d. Go to Step 2.

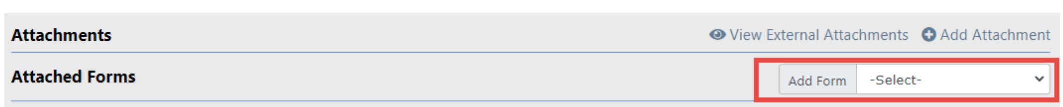
Option 2

a. Access *Edit Fleet Vehicle* and click on the **Vehicle** tab, if not already on the tab.



For details on accessing *Edit Fleet Vehicle*, refer to "Edit Vehicles " on page 711.

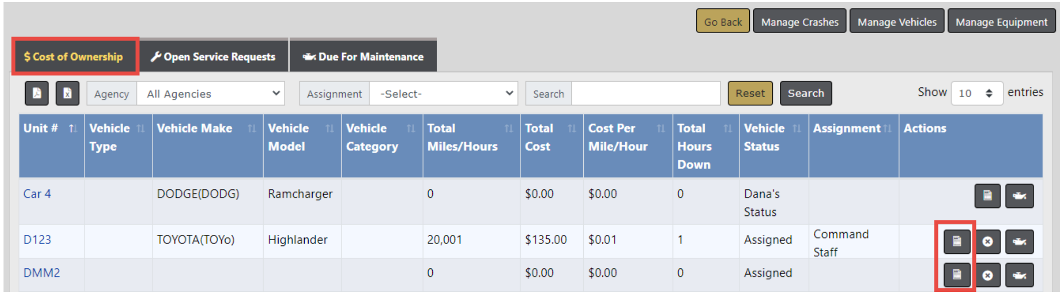
b. Page down to the **Attached Forms** grid then select the form.



c. Go to Step 2.

Option 3

a. Access *Cost of Ownership* of Fleet Management.

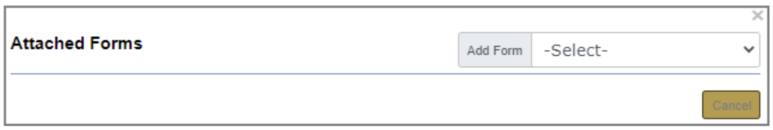


Unit #	Vehicle Type	Vehicle Make	Vehicle Model	Vehicle Category	Total Miles/Hours	Total Cost	Cost Per Mile/Hour	Total Hours Down	Vehicle Status	Assignment	Actions
Car 4		DODGE(DODG)	Ramcharger		0	$0.00	$0.00	0	Dana's Status		
D123		TOYOTA(TOYo)	Highlander		20,001	$135.00	$0.01	1	Assigned	Command Staff	
DMM2					0	$0.00	$0.00	0	Assigned		

For details on accessing *Cost of Ownership*, refer to "Fleet Manager" on page 676.

b. Click the Add Custom Forms icon .

c. Select the available Custom Form from the list.



d. Go to Step 2.

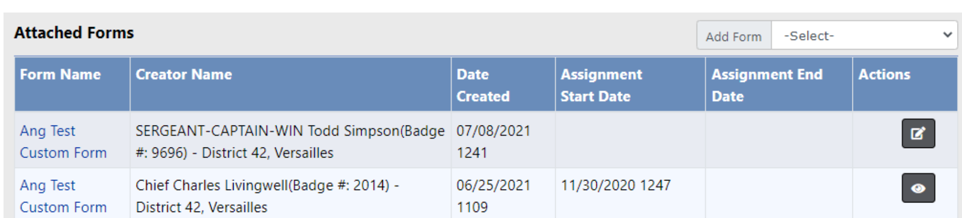
2. The chosen form opens.

3. Complete the form and optionally print.

4. Click **Save** to save your entry and stay on the form, or click **Save and Exit** to save your entry and close the form.

5. If you click **Save**, a **Submit for Review** button appears. Click to submit for review if appropriate.

6. The Custom Form record then appears in the **Attached Forms** grid of the fleet vehicle record.



Form Name	Creator Name	Date Created	Assignment Start Date	Assignment End Date	Actions
Ang Test Custom Form	SERGEANT-CAPTAIN-WIN Todd Simpson(Badge #: 9696) - District 42, Versailles	07/08/2021 1241			
Ang Test Custom Form	Chief Charles Livingwell(Badge #: 2014) - District 42, Versailles	06/25/2021 1109	11/30/2020 1247		

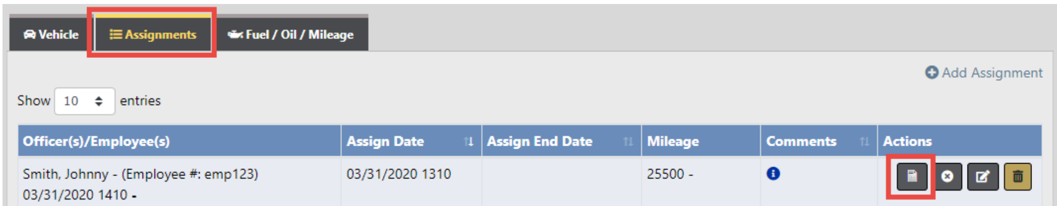
Note: Custom Forms added to the Fleet Vehicle do not have an Assignment Start Date and Assignment End Date, whereas Custom Forms added to the Fleet Vehicle Assignment do.

To Add a Custom Form to a Fleet Vehicle Assignment:

1. Choose one of the following options:

   Option 1

   a. Access *Edit Fleet Vehicle*, click on the **Assignments** tab.

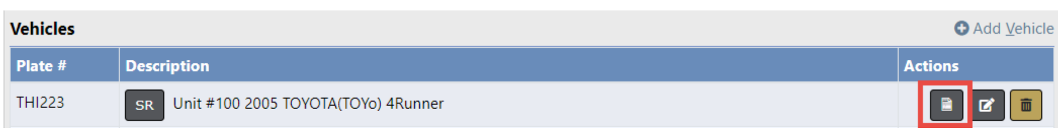


   For details on accessing Edit Fleet Vehicle, refer to "Edit Vehicles " on page 711.

   b. Click the Add Custom Form icon .

   Option 2

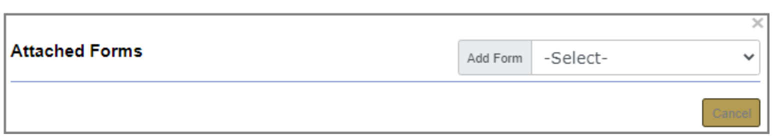
   a. From the *Vehicles grid* on the *Edit Officer Daily Log*.



   For details on accessing the Officer Daily Log, refer to "Officer Daily Log (ODL) Overview" on page 539.

   b. Click the Add Custom Form icon .

2. Select the available custom form from the list.



3. Go to "To Add a Custom Form to a Fleet Vehicle" on page 703 and page down to step 2.

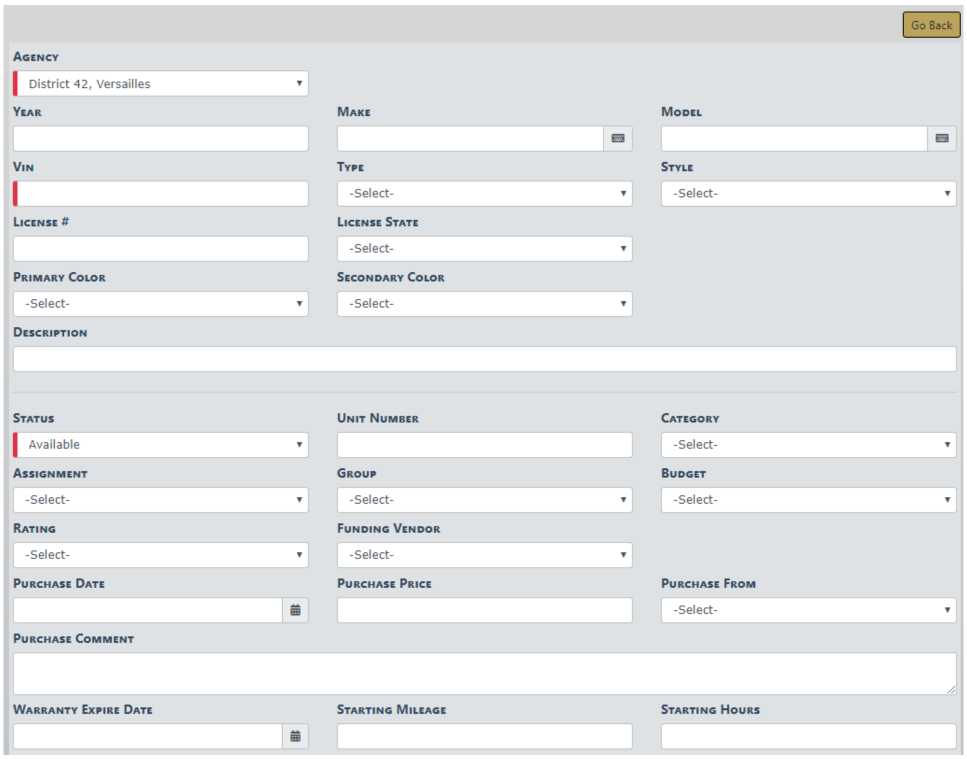
Add Vehicles

Fleet Managers have the ability to add vehicles to the Fleet Management module by way of the **Fleet Management Dashboard**. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard.

2. The **Fleet Vehicle Search** screen appears. Before adding the vehicle, it is recommended you first search for the vehicle to verify whether or not it already exists, though not required. For instructions on how to search for vehicles refer to "Search Vehicles " on page 700.

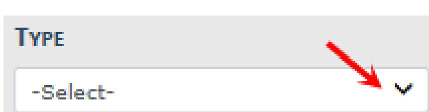
3. Click on the **Add Vehicle** button on the **Fleet Vehicle Search** window to open the **Add Fleet Vehicle** screen. Enter the Vehicle information in the fields provided.



Note: Custom Fields, if applicable, do not appear until after you add required fields and select the **Save** button. Once the screen refreshes, the custom fields appear for filling in.

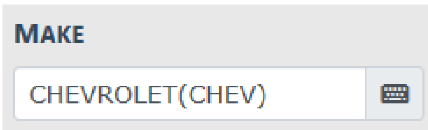
- The **Agency** of the vehicle defaults to the Fleet Manager's agency; however, with appropriate permissions you can change it to any agency within the organization by clicking on the .

- The fields with **-Select-** supply a specific list from which to choose. For example, to search for a vehicle **Type** of *Automobile* click on the and a list will appear, then click *Automobile* from the list and it appears in the field.



Note: The list of available **Styles** dynamically changes based on the chosen **Type**.

- The fields with an  on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *chev* to view a list of *chev* options from which to choose, then click on the option you want and it appears in the **Make** field.



Note You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

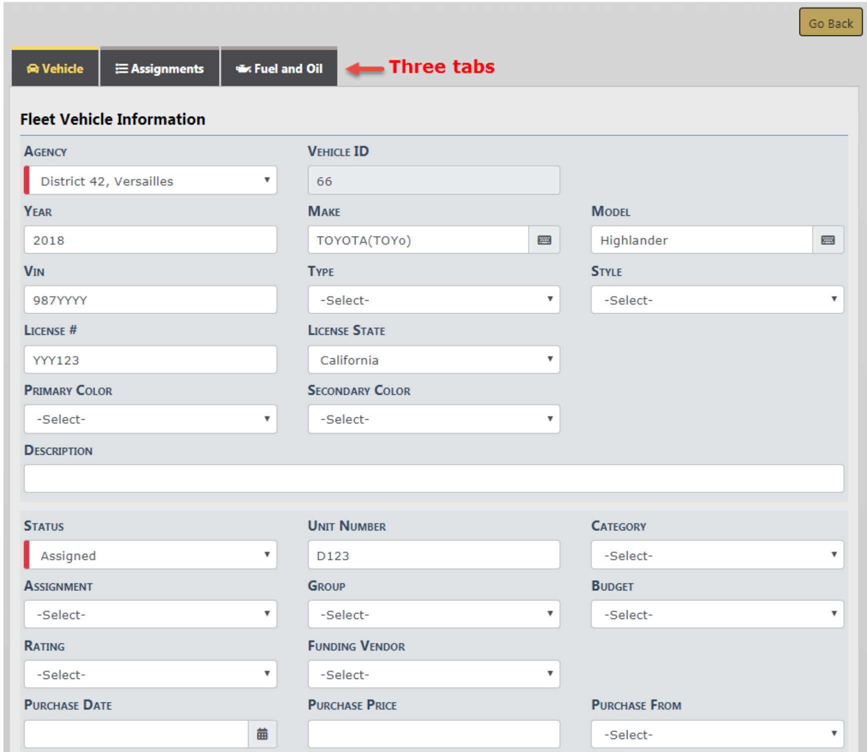
Note: The list of available **Models** dynamically changes based on the chosen **Make**.

- You can enter the **Starting Mileage** or **Starting Hours** at time of purchase. This value is used in determining mileage or hours used on the vehicle.

Note: The **Status** is required when adding a new vehicle record. Examples are *Assigned*, *Out of Service*, and *Available*; though will vary by agency.

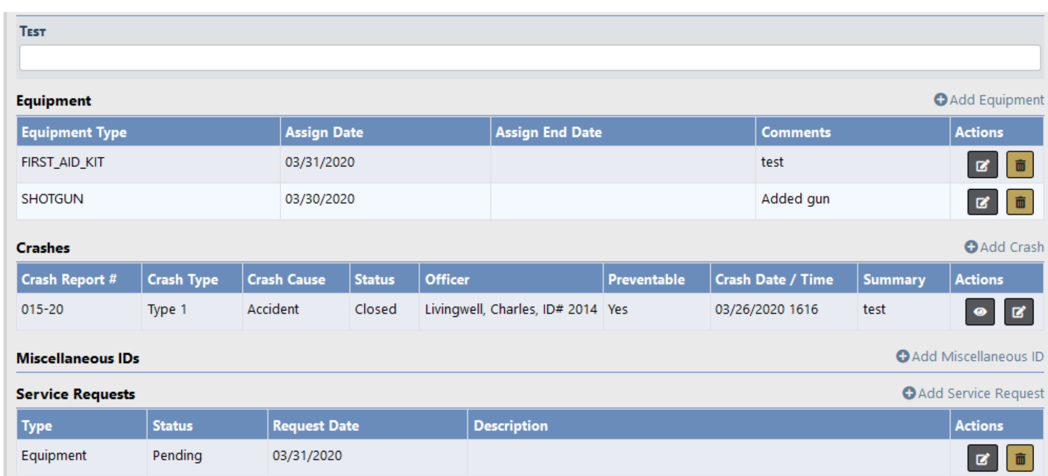
4. Click **Save** to create the Vehicle record, or click **Go Back** to return to the **Fleet Vehicle Search** screen without creating the record.

When you select **Save**, the **Edit Fleet Vehicle** screen displays.

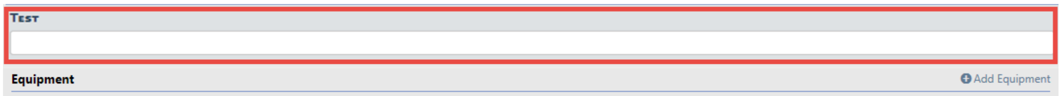


There are three tabs: *Vehicle*, *Assignments*, and *Fuel and Oil*; vehicle information, assignment history of the vehicle, and fuel &oil history, respectively. For managing the information in these tabs refer to "Edit Vehicles " on page 711.

While on the *Vehicle* tab, page down to view or add additional vehicle information in grid format such as attachments, service requests, insurance, inspections, etc. The same general procedure is used for all grid topics, though information will vary. For general instructions refer to "Add a Service Request " on page 722.



Note: Custom Fields, if applicable, appear on the screen immediately above the grid section on the *Vehicle* tab. The custom field Test is used as an example.



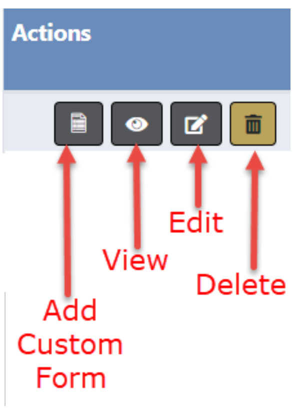
Delete Vehicles

This applies to users with permissions to delete vehicles.

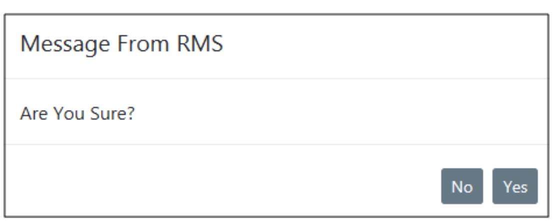
To delete vehicles you must first **Search** for the vehicle. The **Search Results** will provide the option to delete the vehicle data.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. Search for the vehicle you want to delete, then in the search results window click the *Delete* icon on the vehicle record you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles " on page 700.



3. A confirmation window appears. Click **Yes** to delete or **No** to return to the search results window without deleting.



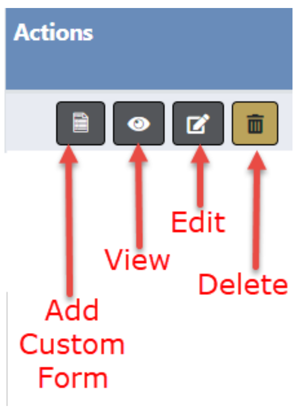
Note: If the vehicle is assigned to an officer, the option to delete is not allowed.

Edit Vehicles

To edit vehicles you must first **Search** for the vehicle. The **Search Results** will provide the option to edit the vehicle data.

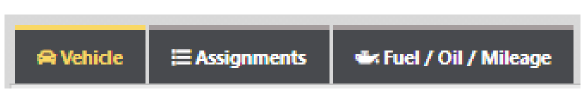
1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. Search for the fleet vehicle you want to update, then in the search results window click the *Edit* icon on the vehicle record you want to update. For instructions on how to search for vehicles refer to "Search Vehicles " on page 700.

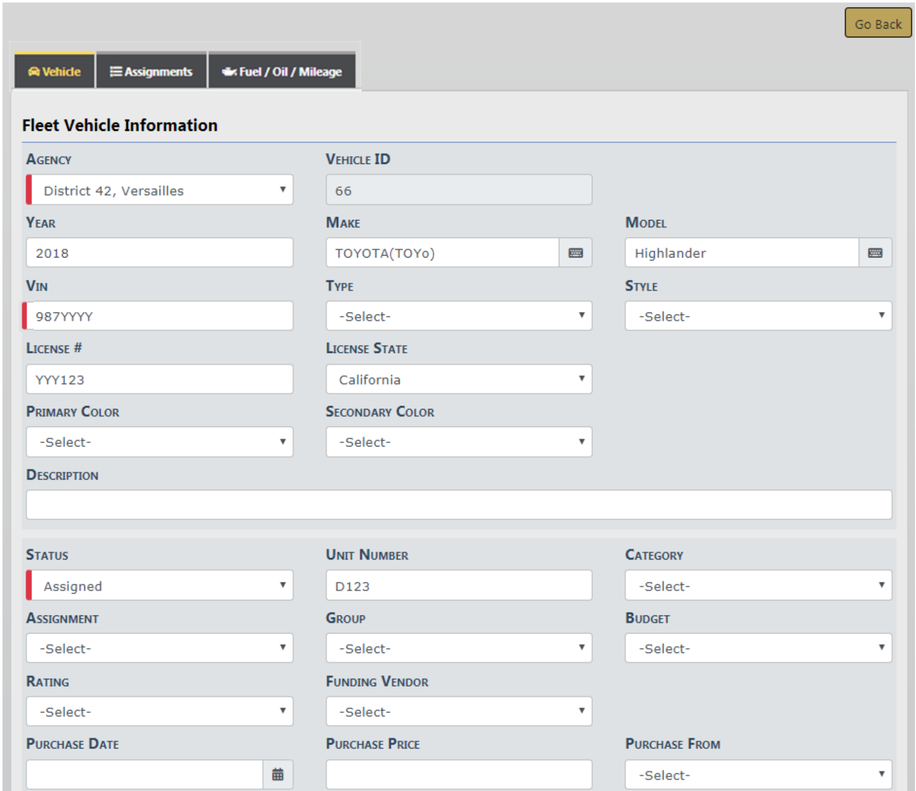


You can add a custom form to the vehicle from *Fleet Vehicle Search Results* without entering edit mode with appropriate permissions. For more information, refer to "Add Custom Forms to Fleet Vehicle and Assignments" on page 703.

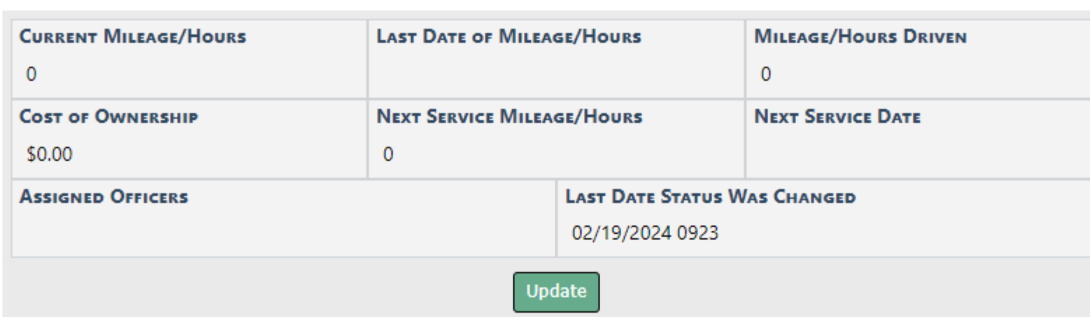
3. The **Edit Fleet Vehicle** form opens with three tabs that contain vehicle information, past and current officers assigned to the vehicle, and fuel/oil/mileage history.



4. The **Vehicle** tab opens by default. You can update, add or delete various vehicle information.



The section immediately following is read only, and will be followed by custom fields where applicable.



Note: Custom Fields, if applicable, appear on the screen immediately above the grid section on the *Vehicle* tab. The custom field Test is used as an example.

Note: Cost of Ownership does not include service maintenance records created within a crash report.

Note: Be aware of the following crash report items:

- You can create or manage crash reports from the *Edit Fleet Vehicle* screen.

  Click the **Add FleetCrash** link to create a crash report, or click the edit icon on a crash record in the grid to update a crash report. For details on managing crash reports, refer to "Manage Fleet Crash Reports" on page 681.

- Maintenance records created within a crash report are only visible within the crash report, not in the Service Maintenance grid on the fleet vehicle itself.

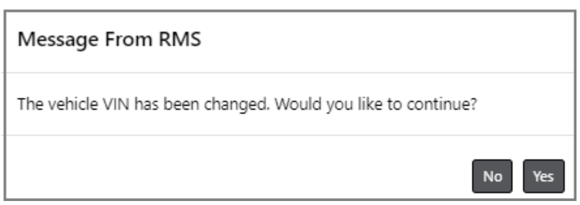
- Costs associated with service maintenance records within a crash report are not included in the Cost of Ownership on the fleet vehicle itself.

- Mileage associated with the service maintenance records within a crash report are not used when determining Next Service Mileage and Next Service Date on the fleet vehicle itself.

Click the **Go Back** button to return to the **Fleet Vehicle Search Results** window, if you wish.

5. Modify the necessary vehicle information on the top half of the form, then click the **Update** button to save.

   Note: If you modify the **VIN** number, a message displays asking if you would like to continue.

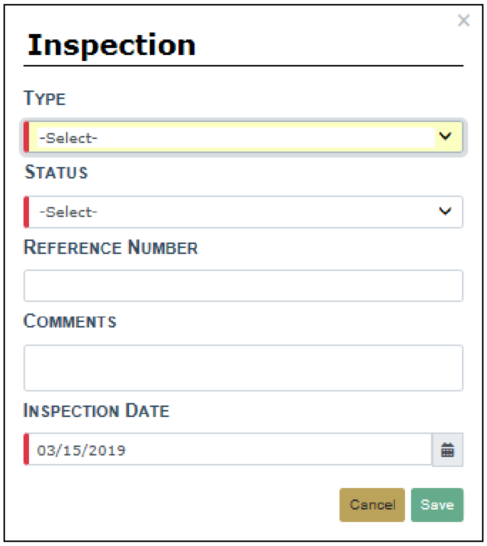


6. Add, edit, or delete additional vehicle information that appears in grids below the **Update** button. While the instructions below only show one example, a similar method applies to all grid sections.

   Add Additional Vehicle Information

   a. To add, click on the button in the grid next to the item you want to add. Enter the necessary data in the window that appears.

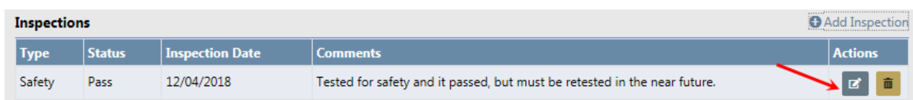
      For example, to add Inspection data, click on the button next to *Add Inspection* and the following window appears:



b. Enter the necessary data then click **Save** to add, or **Cancel** to exit and return to the previous screen.

Edit Additional Vehicle Information

a. Click on the edit Icon to the right of the item you want to update.

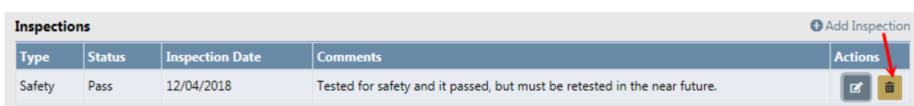


b. An Inspection window appears displaying the current information for that item.

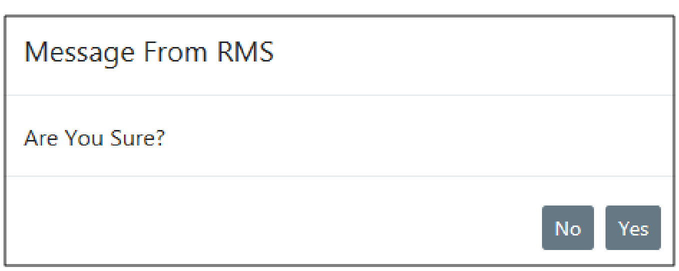
c. Update as needed then click **Save** to apply the updates, or **Cancel** to return to the **Edit Fleet Vehicle** window without saving.

Delete Additional Vehicle Information

a. Click on the trash can icon to the right of the item you want to delete.



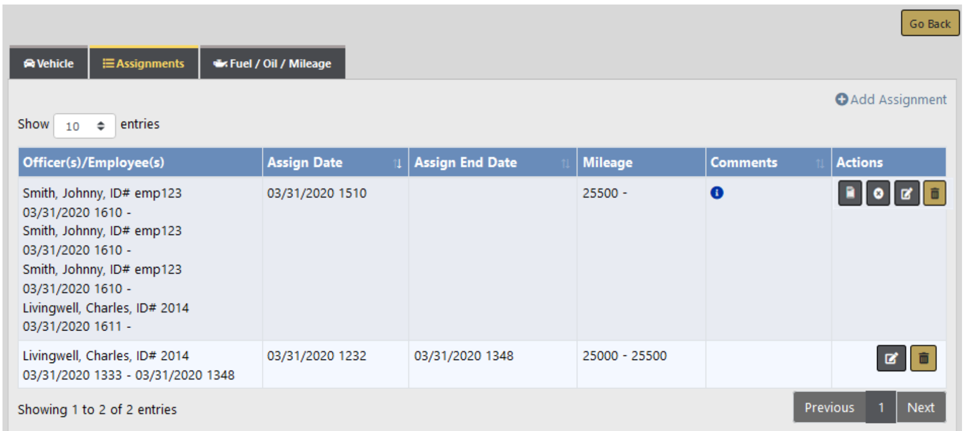
b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Fleet Vehicle** window without deleting.



Vehicle Assignments

You can assign vehicles to officers or employees, regardless if they have a user account or not.

1. Click on the **Assignments** tab to add, edit, and delete officer/employee assignments.



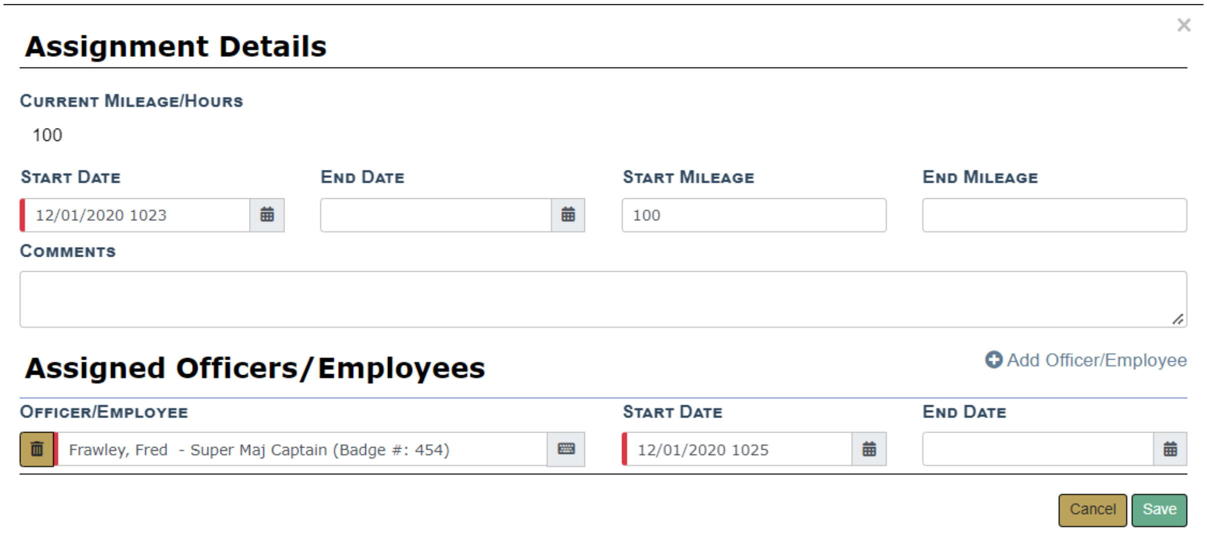
With permissions, you can click  to quickly add a custom form to the fleet vehicle from the Assignments tab. For more information, refer to "Add Custom Forms to Fleet Vehicle and Assignments" on page 703.

Note: New Assignments cannot be created on a vehicle with a **Status** of *Sold* or *Out of Service*. A cannot assign message displays if you try to assign a vehicle that is no longer available.

2. Officers/employees can be assigned two ways: Edit an existing assignment, or add a new assignment.

Add a New Assignment

a. Click on *Add Assignment* to create a new assignment and enter the necessary data in the window that appears as shown below.



If you enter an **End Date**, the date flows into the **End Date** field that is located under Offer Assignment.

Note: You must enter at least one officer.

b. As you enter the officer name, a list of names appear. Click on the appropriate officer name.

For example, if you enter the letters **ch**, a list will appear with all officers that contain the letters **ch** anywhere in their name. Click on the appropriate officer name to fill in the Officer field.

The dates of the officer must be within the dates of the Assignment. The officer **Start Date** will default to the Assignment start date, but it can be changed.

- A warning displays if the officer is assigned to the same vehicle at the same time or the officer has more than one open assignment.
- A list of officers assigned to this vehicle displays if they conflict with the new assignment.

c. Click on *Add Officer/Employee* to add additional officers to the assignment, if any.

- You can assign an officer or an employee who is not an officer.
- A list of vehicles the officer/employee is assigned to displays if they conflict with the new assignment.

d. Click **Save** to create the assignment, or click **Cancel** to return to the **Assignments Tab** without saving.

Edit an Existing Assignment

Note: If given the *always-edit assignment* permission, you can edit assignments that were created by other users; otherwise, you can only edit those that are created by you.

a. Locate the Assignment you would like to edit, then click on the edit icon to display the Officer/Employee Assignment window.

b. Update the necessary information, such as Start Mileage, Comments, etc. If the Vehicle Assignment contains an **End Date**, that date flows into the Officer Assignment **End Date** field.

- Starting mileage is entered at the time of assignment and ending mileage when the assignment is complete.
- A warning displays if the assignment date overlaps with existing assignments.

c. Click on *Add Officer/Employee* to add additional officers/employees, if applicable. Multiple offficers/employees can be added. You can assign employees who are not officers.

d. Enter the **End Date** to end an Assignment for an officer, if applicable.

e. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.

Note: Creating a new Assignment updates the Status of the vehicle to Assigned.

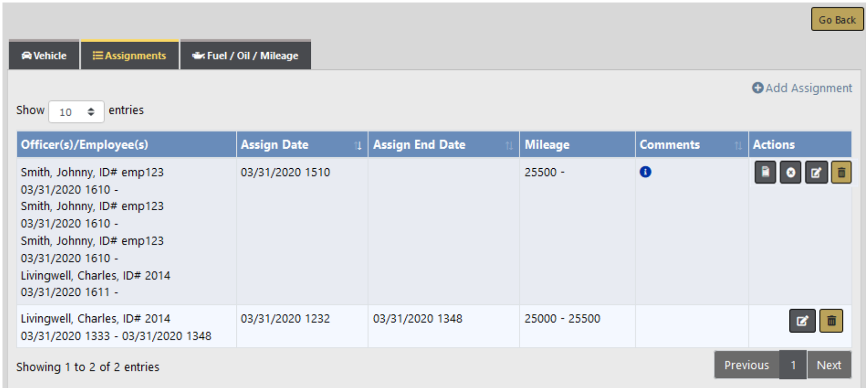
Note: Assigned vehicles display to the officer in the Daily Log module.

Note: Additional officers added to the Daily Log must also be added manually to the Assignment within Fleet Management. Refer to "Officers" on page 545 for more Daily Log information.

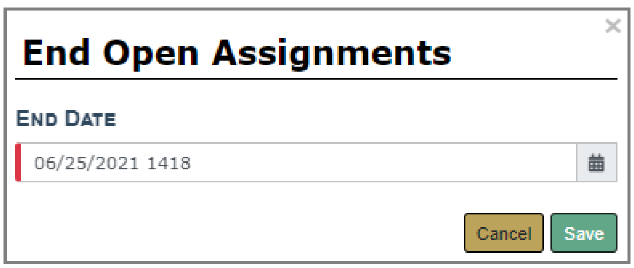
End Assignments

To close an entire Assignment, you must enter the **End Date** for all officers as well as the Assignment itself.

1. Click on the **Assignments** tab, then click the edit icon on the **Assignment** you want to close.



You can also end open assignments quickly. Click on the End Open Assignments icon , enter the **End Date**, then click **Save**.



This ends any open assignments for officers assigned to the vehicle.

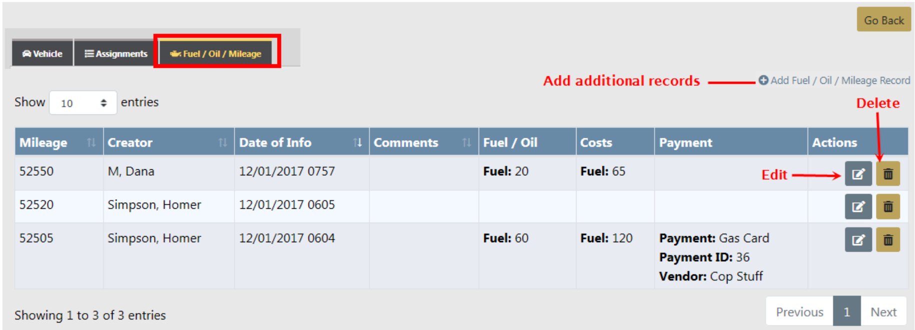
2. Enter the **End Date.**

Note: The officer/employee End Dates must be on or before the Vehicle Assignment End Date. Also, ending an Vehicle Assignment updates the Status of the vehicle.

3. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.

Manage Fuel, Oil, Mileage

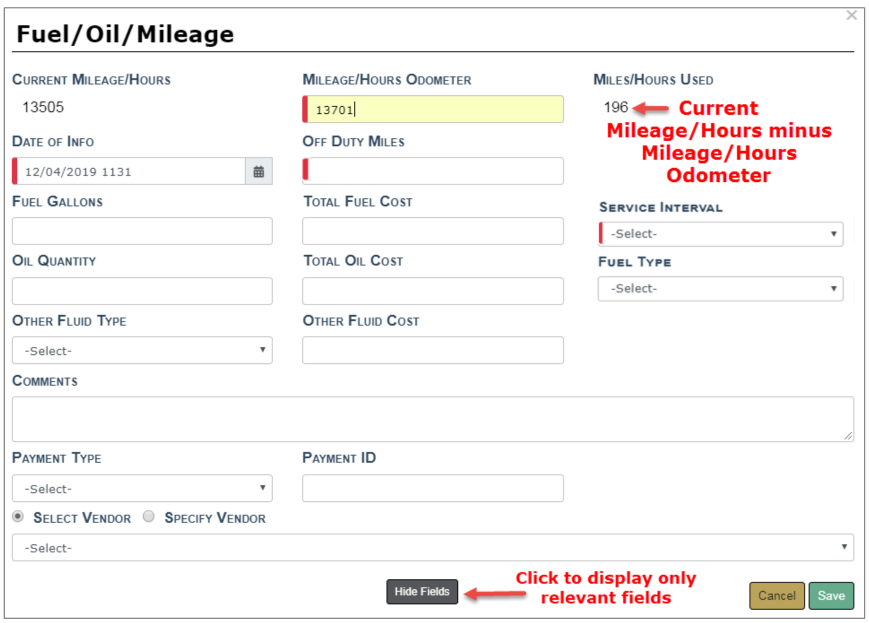
Vehicle **Fuel**, **Oil**, and **Mileage** are managed under the **Fuel/Oil/Mileage** tab on the **Edit Fleet Vehicle** screen.



Add a New Record

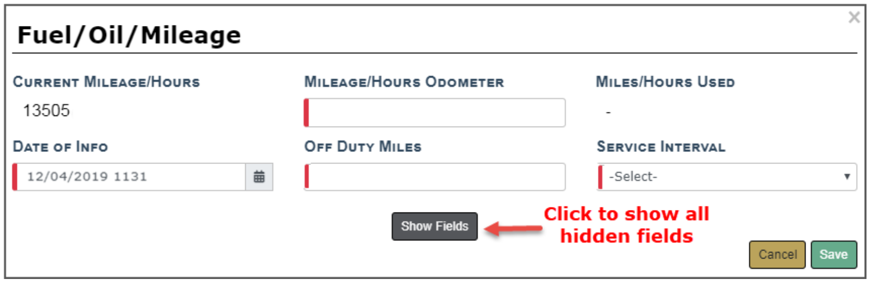
1. Click on *Add Fuel / Oil / Mileage Record* on the **Fuel/Oil/Mileage** tab to add a new record.

2. Enter the relevant information.



Note: The **Current Mileage** displayed on the *Vehicle Tab* looks at service maintenance records (excluding crash report service maintenance records) and fuel/oil/mileage records to find the max mileage entered for the vehicle.

Optionally, click the **Hide Fields** button to display only relevant fields for which you need to supply data.

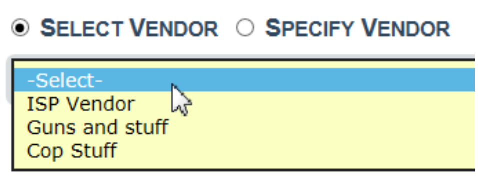


Click the **Show Fields** button to display all hidden fields.

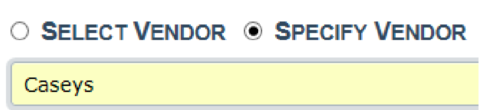
Note: A permission category controls the default look is this screen. If the permission category is assigned, then you see all the fields with a **Hide Fields** button; otherwise, only a portion of the fields appear with the **Show Fields** button.

- The *Current Mileage/Hours* and *Mileage/Hours Odometer* fields are both read-only.
- Fields with a down arrow  supply a list of values from which to choose. Click on the field then choose from the list that appears.
- If applicable, the **Vendor** gives you the option to *Select* a value from a list, or *Specify* your own Vendor. Click on one of the options, then select or enter your answer in the text field provided.

Select a Vendor Example:

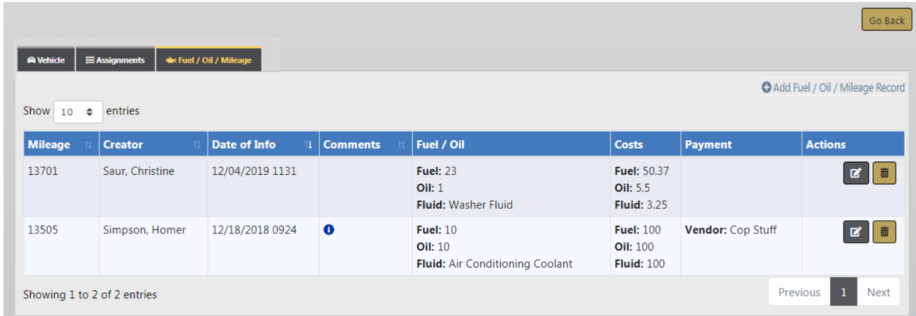


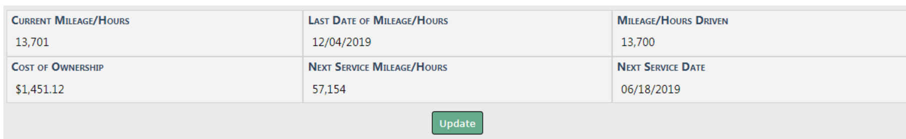
Specify a Vendor Example:

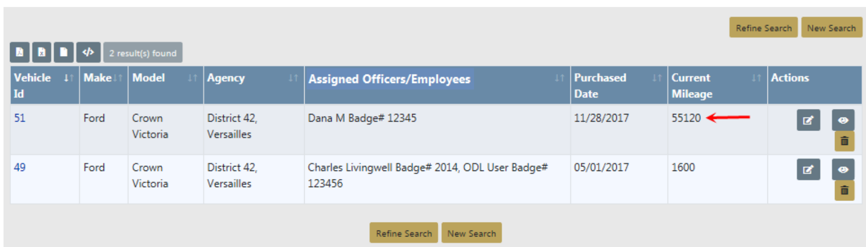


3. Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Mileage Tab** without saving.
4. The record appears under the **Fuel/Oil/Mileage Tab** of the **Edit Fleet Vehicle** screen.

Note: The **Current Mileage** displayed on the *Vehicle Tab* looks at service maintenance records (excluding crash report service maintenance records) and fuel/oil/mileage records to find the max mileage entered for the vehicle.







Edit a Record

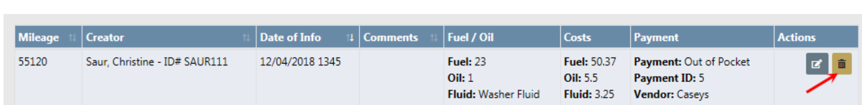
Note: If given the *always-edit fuel & Oil* permission, you can edit records that were created by other users; otherwise, you can only edit those that are created by you.

1. Click on the edit icon and apply the necessary updates.

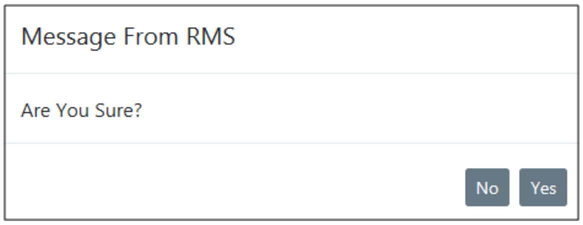
2. Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Mileage Tab** without saving.

Delete a Record

1. Click on the trash can icon to delete a record.



2. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Fuel/Oil/Mileage** window without deleting.



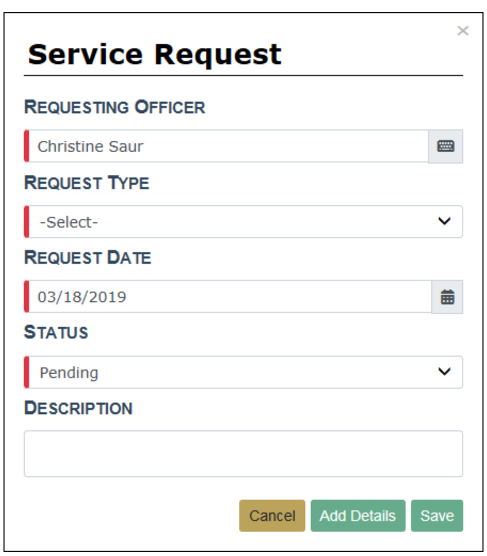
Add a Service Request

To add a **Service Request** to a vehicle you must first **Search** for the vehicle, then edit the vehicle in the **Search Results** window.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.
2. Search for the vehicle you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles " on page 700.
3. In the search results window, click the edit icon on the vehicle that needs the **Service Request**.
4. Click on the *Vehicle* tab of the **Edit Fleet Vehicle** window, page down until you see the **Service Requests** grid, then click **Add Service Request**.

Type	Status	Request Date	Description	Actions
Repair	Complete	12/01/2017	tires need air	
Equipment	Pending	12/01/2017	new radar needed	

5. Enter the values in the *Service Request* window.

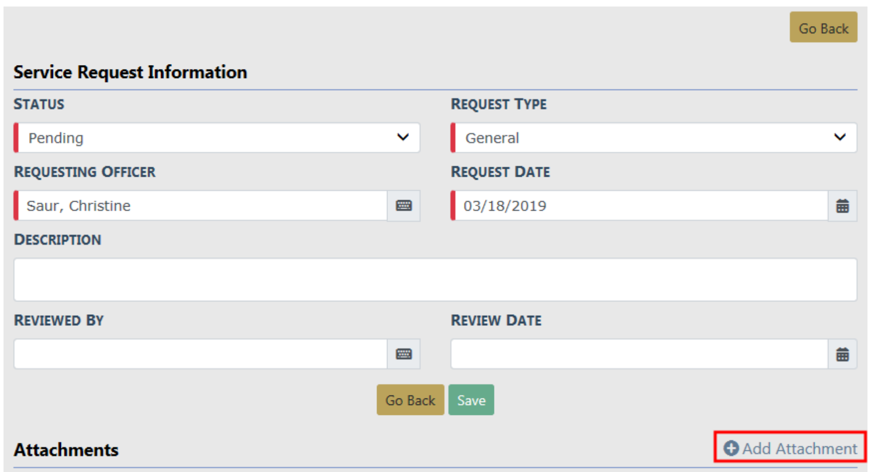


Requesting Officer defaults to the current user, but can be changed if the user is a Fleet Manager.

A notification is sent to all Fleet Managers when the Service Request is saved.

6. Click **Save** to create the Service Request, **Cancel** to return to the **Edit Fleet Vehicle** window without saving, or click **Add Details** to add **Attachments** to the **Service Request**.

   If you clicked the **Add Details** button, a *Service Request Information* window appears where you can add attachments.



Note: Attachments are added to a temporary holding place or queue; you must then upload the files to the Service Request record.

For detailed instructions on adding attachments, refer to "Add Attachments" on page 69.

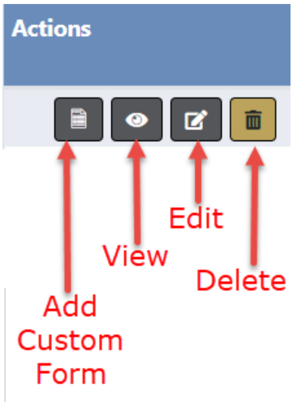
Edit a Service Request

To edit a Service Request that is associated to a vehicle you must first **Search** for the vehicle, then edit the vehicle in the **Search Results** window.

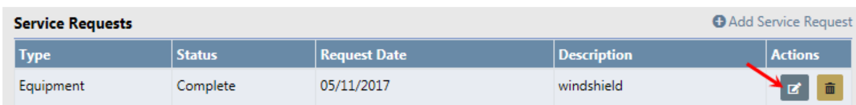
1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. Search for the vehicle associated with the **Service Request**. For instructions on how to search for vehicles refer to "Search Vehicles " on page 700.

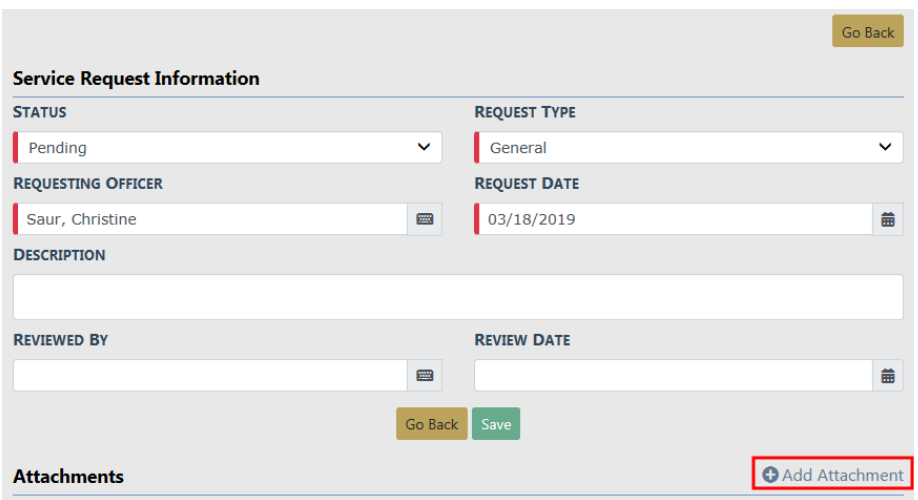
3. Click the edit icon on the vehicle record that is associated with the **Service Request**.



4. Page down to the **Service Request** section on the **Edit Fleet Vehicle** window, then click on the edit icon on the **Service Request** record you need to update.



5. Make the necessary updates in the **Edit Service Request** window.



Note: You can also delete, edit, or download attachments. For more information on attachments refer to "Attachments" on page 69.

6. Click **Save** to update the record, or click **Go Back** to return to the **Edit Fleet Vehicle** window without saving.

Approve a Service Request

To approve a **Service Request** the Fleet Manager may take action on the **Service Request Notification**, or edit the vehicle and select the *Edit* icon for the **Service Request**.

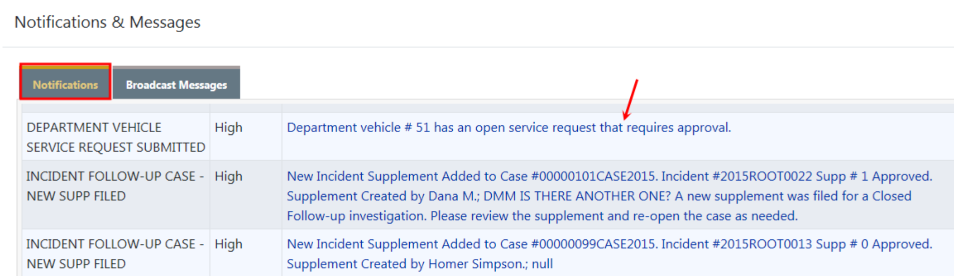
Take Action on a Service Request Notification

When new notifications arrive, the total number of Notifications appear in red near the top right of the screen.

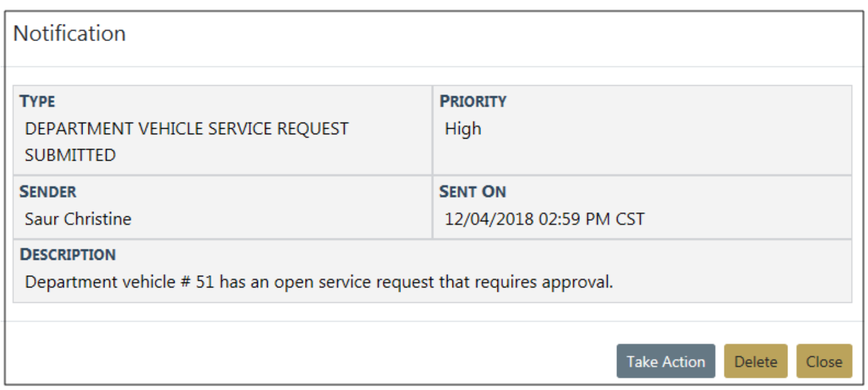
1. Click on the red notification indicator to view the list of Notifications and Broadcast messages.

   For more information on accessing Notifications, refer to "Notifications" on page 25.

1. Click on the **Notification** tab, then click on the appropriate Service Request Notification to take action.

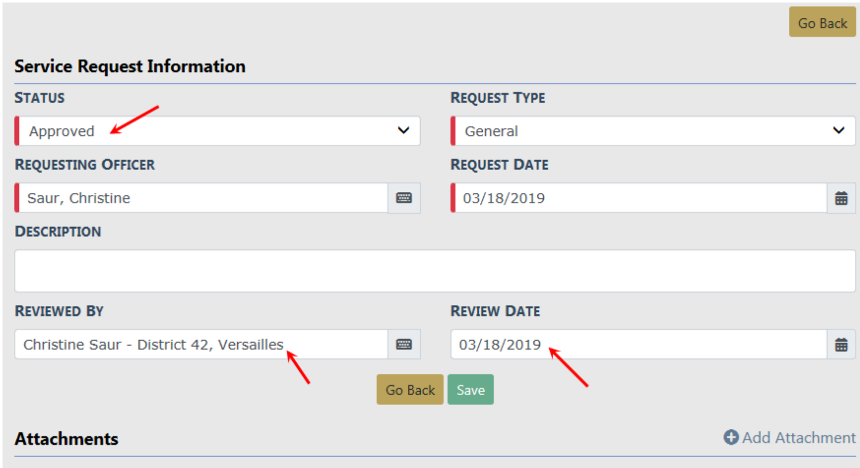


2. Click the **Take Action** button. You may also click on the **Print** icon to print the Notification.



Note: A warning message appears if you have already viewed or taken action on the Notification. Click **Yes** to **Take Action** or **No** to exit without taking action.

3. If you chose to Take Action the Edit Service Request screen appears. Change the **Status** to **Approved**, enter the **Reviewed By** and **Review Date**.



4. Click **Save** to Approve then click **Go Back** to the **Edit Fleet Vehicle** window. Or click **Go Back** to abort the change without saving.

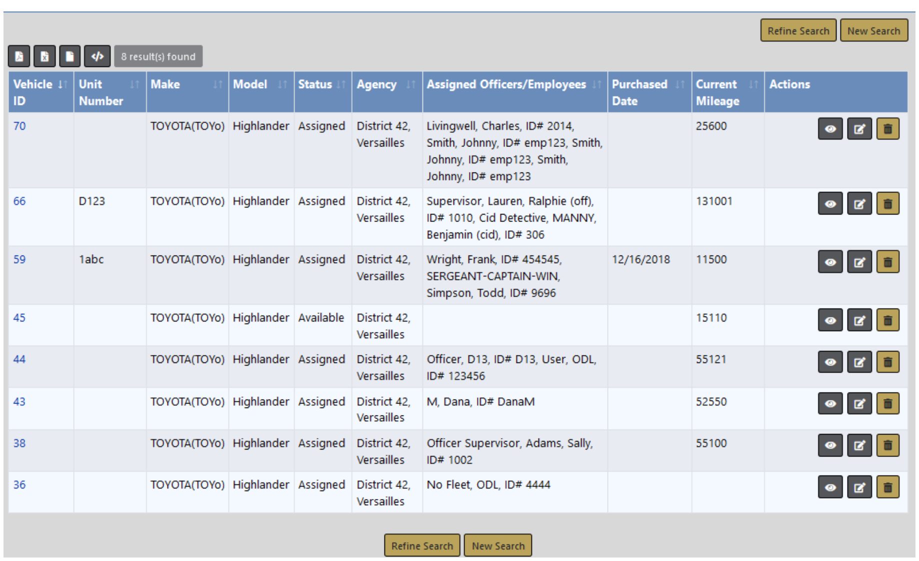
5. If you chose to save, a **Notification** is sent to the **Requested by User**.

Edit the Vehicle

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. The **Fleet Vehicle Search** screen appears. Search for the vehicle you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles " on page 700.

   The results below are based on a search for a Toyota Highlander.



Refine Search New Search

8 result(s) found

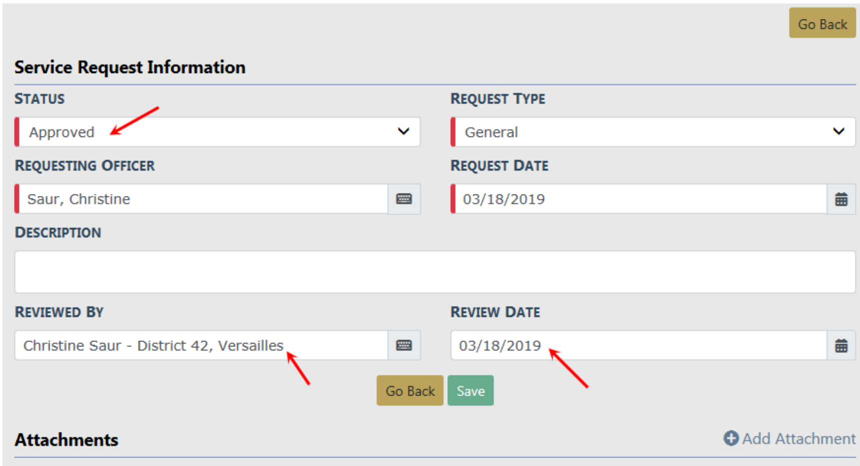
Vehicle ID	Unit Number	Make	Model	Status	Agency	Assigned Officers/Employees	Purchased Date	Current Mileage	Actions
70		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Livingwell, Charles, ID# 2014, Smith, Johnny, ID# emp123, Smith, Johnny, ID# emp123, Smith, Johnny, ID# emp123		25600	
66	D123	TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Supervisor, Lauren, Ralphie (off), ID# 1010, Cid Detective, MANNY, Benjamin (cid), ID# 306		131001	
59	1abc	TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Wright, Frank, ID# 454545, SERGEANT-CAPTAIN-WIN, Simpson, Todd, ID# 9696	12/16/2018	11500	
45		TOYOTA(TOYo)	Highlander	Available	District 42, Versailles			15110	
44		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Officer, D13, ID# D13, User, ODL, ID# 123456		55121	
43		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	M, Dana, ID# DanaM		52550	
38		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Officer Supervisor, Adams, Sally, ID# 1002		55100	
36		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	No Fleet, ODL, ID# 4444			

Refine Search New Search

3. Click the edit icon on the vehicle that needs **Service Request** approval.

4. Page down to the Service Request section, and click the edit icon associated with the Service Request.

5. Change the **Status** to **Approved**, enter the **Reviewed By** and **Review Date**.



6. Click **Save** to Approve then click **Go Back** to the **Edit Fleet Vehicle** window. Or click **Go Back** to abort the change without saving.

   If you chose to save, a **Notification** is sent to the **Requested by User** upon approval of the Service Request. The **Requested by User** then clicks on the Notification and opens the details to **Review**, **Reply**, or **Take Action**.

Complete a Service Request

After the Service Request has been approved and the maintenance has been done satisfactory, the Service Request should be marked complete. To complete a **Service Request** the Fleet Manager can associate the **Service Request** to a **Service Maintenance** record, or edit the vehicle and select the Edit icon for the **Service Request**. Change the Status on an existing Service Request.

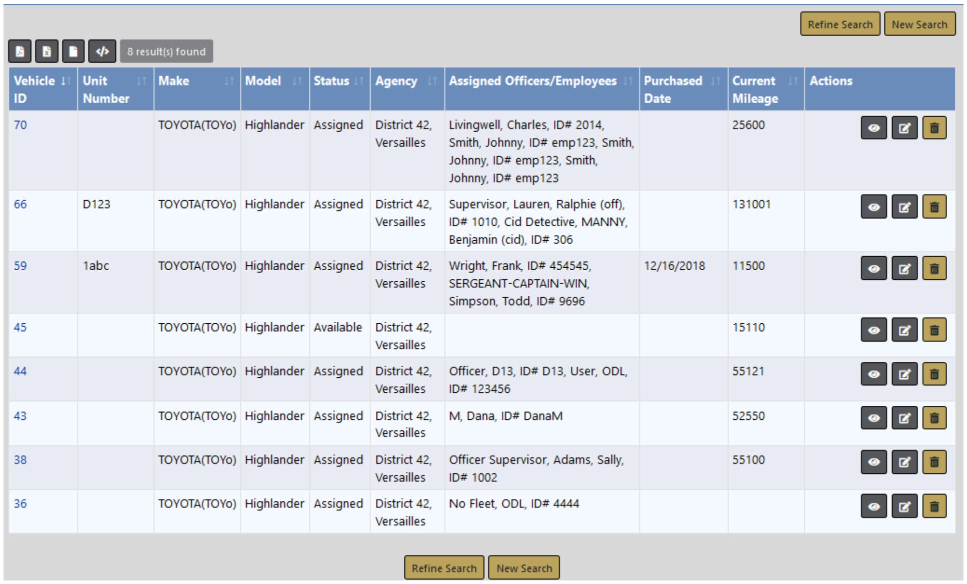
Note: For detailed instructions on associating the **Service Request** to a **Service Maintenance** record, refer to "Add Service Maintenance and Repair" on page 730.

Change the Status on an existing Service Request:

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. The **Fleet Vehicle Search** screen appears. Search for the vehicle you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles " on page 700.

   The results below are based on a search for a Toyota Highlander.



Refine Search New Search

8 result(s) found

Vehicle ID	Unit Number	Make	Model	Status	Agency	Assigned Officers/Employees	Purchased Date	Current Mileage	Actions
70		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Livingwell, Charles, ID# 2014, Smith, Johnny, ID# emp123, Smith, Johnny, ID# emp123, Smith, Johnny, ID# emp123		25600	
66	D123	TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Supervisor, Lauren, Ralphie (off), ID# 1010, Cid Detective, MANNY, Benjamin (cid), ID# 306		131001	
59	1abc	TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Wright, Frank, ID# 454545, SERGEANT-CAPTAIN-WIN, Simpson, Todd, ID# 9696	12/16/2018	11500	
45		TOYOTA(TOYo)	Highlander	Available	District 42, Versailles			15110	
44		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Officer, D13, ID# D13, User, ODL, ID# 123456		55121	
43		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	M, Dana, ID# DanaM		52550	
38		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Officer Supervisor, Adams, Sally, ID# 1002		55100	
36		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	No Fleet, ODL, ID# 4444			

Refine Search New Search

3. Click the edit icon on the vehicle that needs **Service Request** approval.

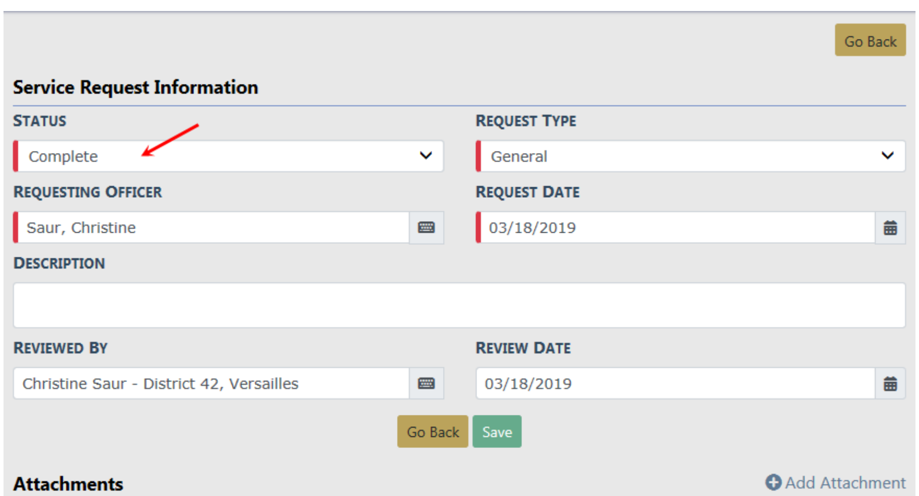
4. Page down to the Service Request section, and click the edit icon associated with the Service Request.

Service Requests

Add Service Request

Type	Status	Request Date	Description	Actions
Equipment	Complete	05/11/2017	windshield	

5. Change the **Status** to **Complete**.



6. Click **Save** to Complete then click **Go Back** to the **Edit Fleet Vehicle** window, or click **Go Back** without saving to abort the change.

Note: Completing a Service Request removes it from the Open Dashboard.

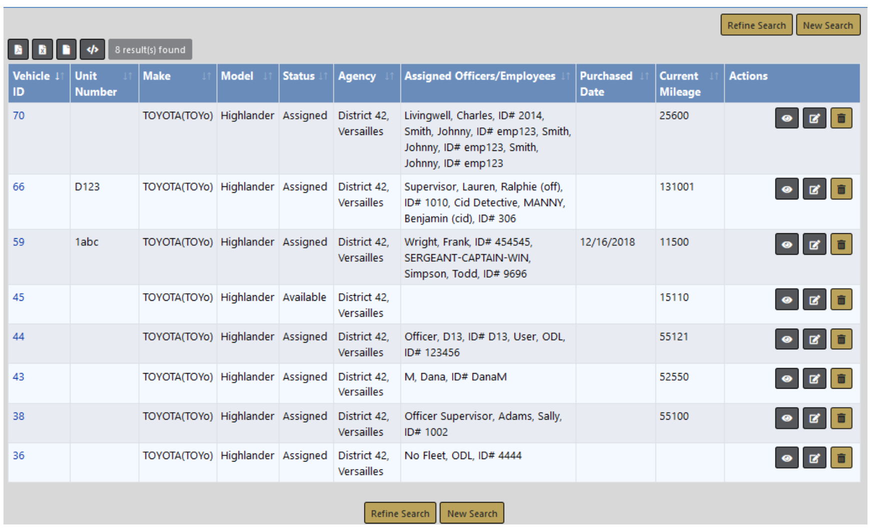
Delete Service Requests

To delete service requests you must first **Search** for the vehicle that is tied to the service request. The **Search Results** will provide the option to delete the service request record.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. The **Fleet Vehicle Search** screen appears. Search for the vehicle you want to delete. For instructions on how to search for vehicles refer to "Search Vehicles " on page 700.

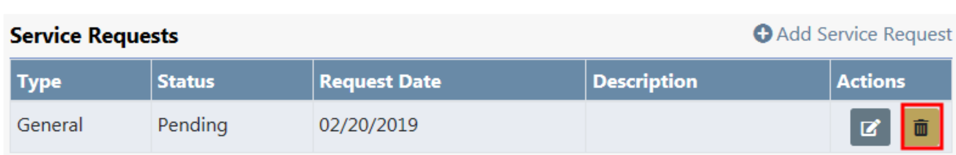
   The results below are based on a search for a Toyota Highlander.



Vehicle ID	Unit Number	Make	Model	Status	Agency	Assigned Officers/Employees	Purchased Date	Current Mileage	Actions
70		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Livingwell, Charles, ID# 2014, Smith, Johnny, ID# emp123, Smith, Johnny, ID# emp123, Smith, Johnny, ID# emp123		25600	
66	D123	TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Supervisor, Lauren, Ralphie (off), ID# 1010, Cid Detective, MANNY, Benjamin (cid), ID# 306		131001	
59	1abc	TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Wright, Frank, ID# 454545, SERGEANT-CAPTAIN-WIN, Simpson, Todd, ID# 9696	12/16/2018	11500	
45		TOYOTA(TOYo)	Highlander	Available	District 42, Versailles			15110	
44		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Officer, D13, ID# D13, User, ODL, ID# 123456		55121	
43		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	M, Dana, ID# DanaM		52550	
38		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Officer Supervisor, Adams, Sally, ID# 1002		55100	
36		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	No Fleet, ODL, ID# 4444			

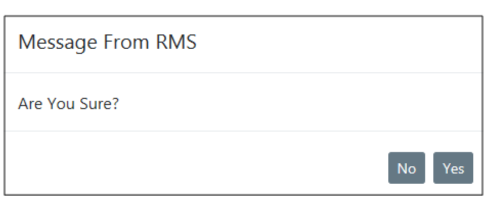
3. Identify which vehicle is associated with the service requests and click on the edit icon.

4. Page down to the Service Requests section and click on the Delete icon to delete.



Type	Status	Request Date	Description	Actions
General	Pending	02/20/2019		

5. A confirmation message appears.



6. Click **Yes** to delete or **No** to return to the results window without deleting.

   Note: Deleting a **Service Request** also removes it from an associated **Service Maintenance** record.

Add Service Maintenance and Repair

Service Maintenance records reflect the total service cost associated to an invoice, and **Service Repair** records reflect detailed costs of that invoice.

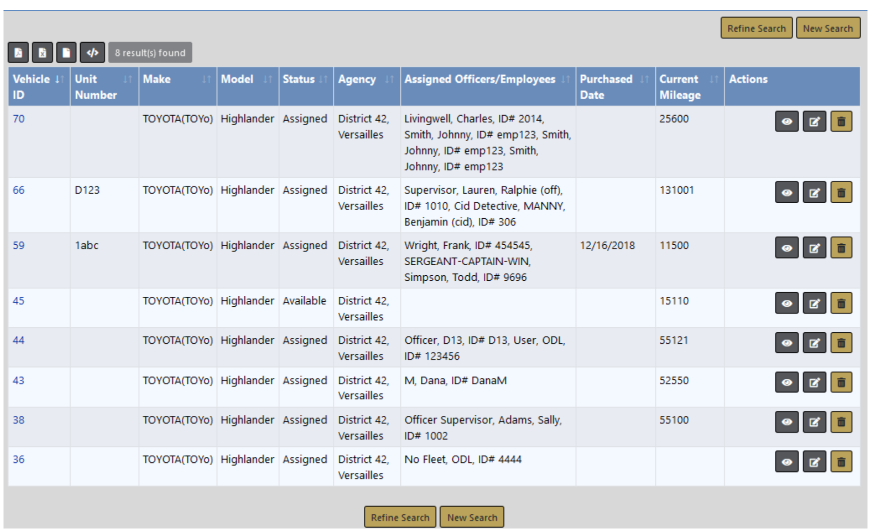
For example, a **Service Maintenance** record contains the total invoice amount of $100 for invoice number 1234, and there are two **Service Repair** records (tire repair $50 and oil change $50) that equal $100 for invoice number 1234.

To add a **Service Maintenance** record to a vehicle you must first **Search** for the vehicle, then edit the vehicle in the **Search Results** window.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. The **Fleet Vehicle Search** screen appears. Search for the vehicle. For instructions on how to search for vehicles refer to "Search Vehicles " on page 700.

   The results below are based on a search for a Toyota Highlander.



Refine Search New Search

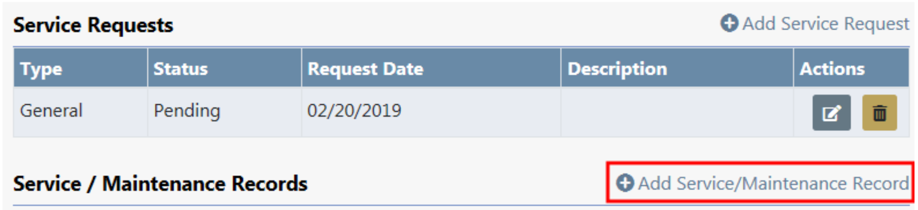
8 result(s) found

Vehicle ID	Unit Number	Make	Model	Status	Agency	Assigned Officers/Employees	Purchased Date	Current Mileage	Actions
70		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Livingwell, Charles, ID# 2014, Smith, Johnny, ID# emp123, Smith, Johnny, ID# emp123, Smith, Johnny, ID# emp123		25600	
66	D123	TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Supervisor, Lauren, Ralphie (off), ID# 1010, Cid Detective, MANNY, Benjamin (cid), ID# 306		131001	
59	1abc	TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Wright, Frank, ID# 454545, SERGEANT-CAPTAIN-WIN, Simpson, Todd, ID# 9696	12/16/2018	11500	
45		TOYOTA(TOYo)	Highlander	Available	District 42, Versailles			15110	
44		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Officer, D13, ID# D13, User, ODL, ID# 123456		55121	
43		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	M, Dana, ID# DanaM		52550	
38		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Officer Supervisor, Adams, Sally, ID# 1002		55100	
36		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	No Fleet, ODL, ID# 4444			

Refine Search New Search

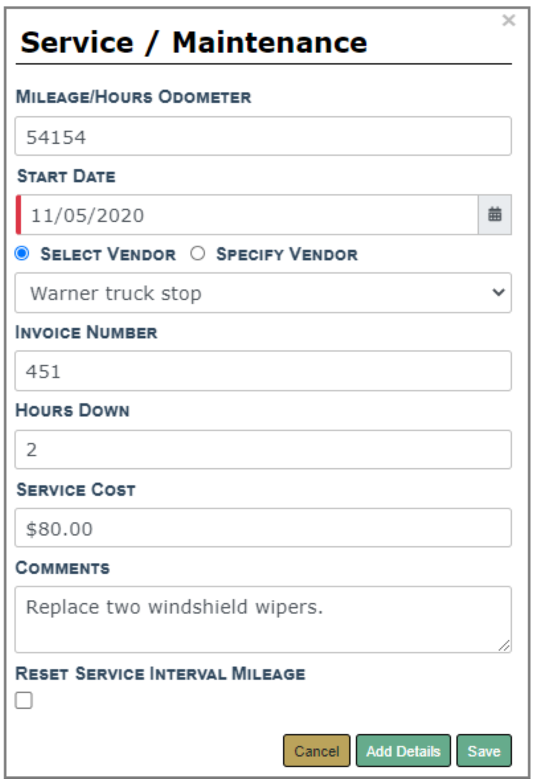
3. Click the edit icon on the vehicle that needs the **Service Maintenance**.

4. Page down and click **Add Service/Maintenance Record** on the **Edit Fleet Vehicle** window.



Service Maintenance records then appear in the grid as shown above. You can edit or delete the **Service Maintenance** records.

5. Enter the values in the Service/Maintenance window.



- The **Vendor** gives you the option to *Select* a value from a list, or *Specify* your own Vendor. Click on one of the options, then select or enter your answer in the text field provided.

- **Reset Service Interval Mileage**

  - Leave this box **empty** If you would like to record services without resetting mileage. Example is when a tire is changed.

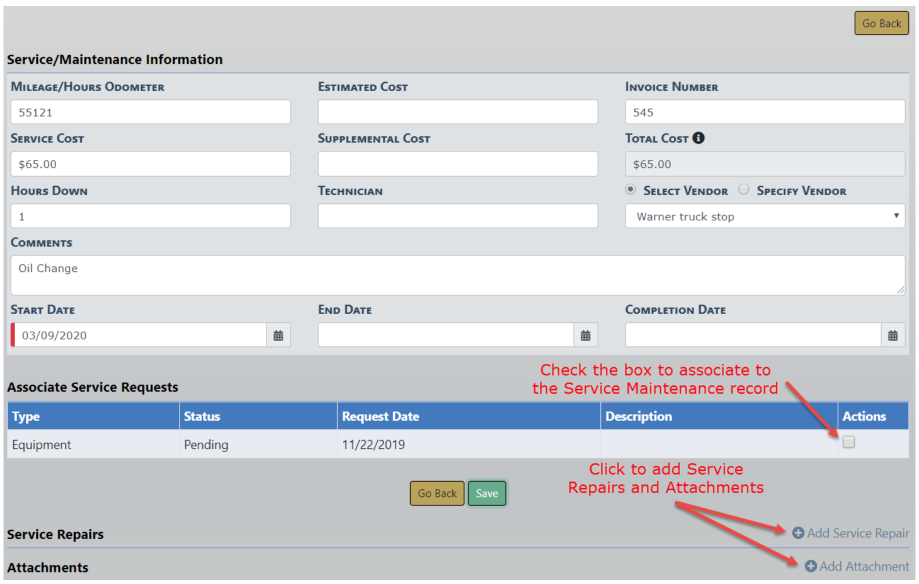
  - **Check** this box if you would like Online RMS to use the mileage of this service maintenance record to determine the *Next Service Mileage* displayed on the *View*

. Example is when the oil is changed.

- This option is not available for service maintenance records created as part of a crash report.

6. Click **Save** to create the **Service Maintenance** record, **Cancel** to return to the **Edit Fleet Vehicle** window without saving, or click **Add Details** to add **Service Repair** records.

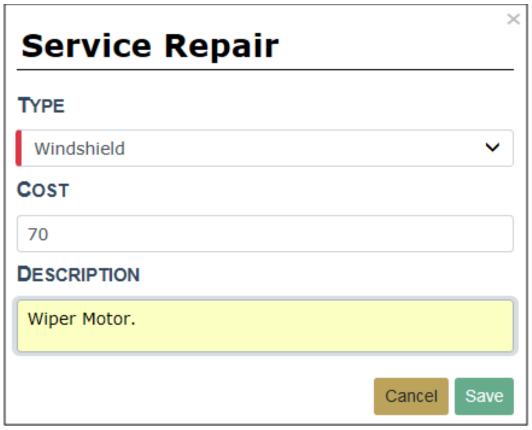
7. If you chose to **Add Details**, the *Edit Service Record* appears. Select the Associate Service Requests, if applicable.



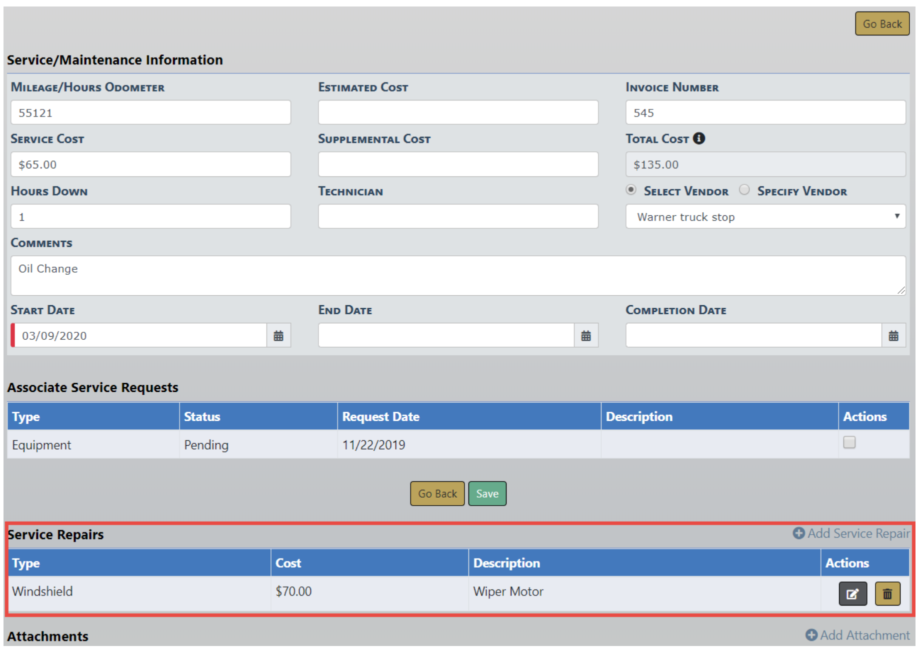
Note: The Fleet Manager can associate none, one, or multiple **Service Requests** to the **Service Record**. All selected **Service Requests** will become marked as **Complete**.

Note: Total Cost is read-only and calculates automatically: Service cost + supplemental costs + repair costs.

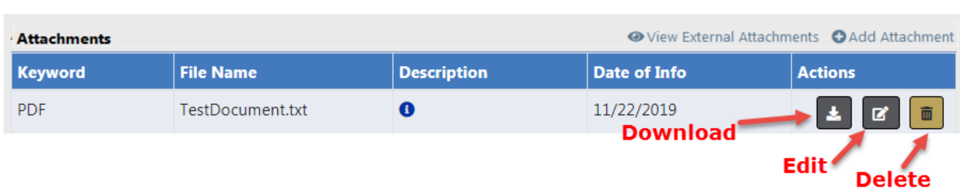
8. Click **Add Service Repair** to enter repair types and costs associated with the **Service Maintenance** record, if any.



9. Click **Save** to create the Service Repair record. **Service Repair** records then appear in the grid as shown above. You can edit or delete the **Service Repair** records.



10. Click **Add Attachment** to include images or documents to the **Service Maintenance** record, if any.



For more information on adding attachments, refer to "Add Attachments" on page 69.

11. Click **Save**, or click **Go Back** to return to the **Edit Fleet Vehicle** window. Both pending and approved **Service Requests** can be associated with a **Service Maintenance Record**.

   Note: A **Service Request** can be associated with only one **Service Maintenance Record**.

   Note: All selected **Service Requests** will become marked as **Complete**.

Update Service Maintenance and Repair

Service Maintenance records reflect the total service cost associated to an invoice, and **Service Repair** records reflect detailed costs of that invoice.

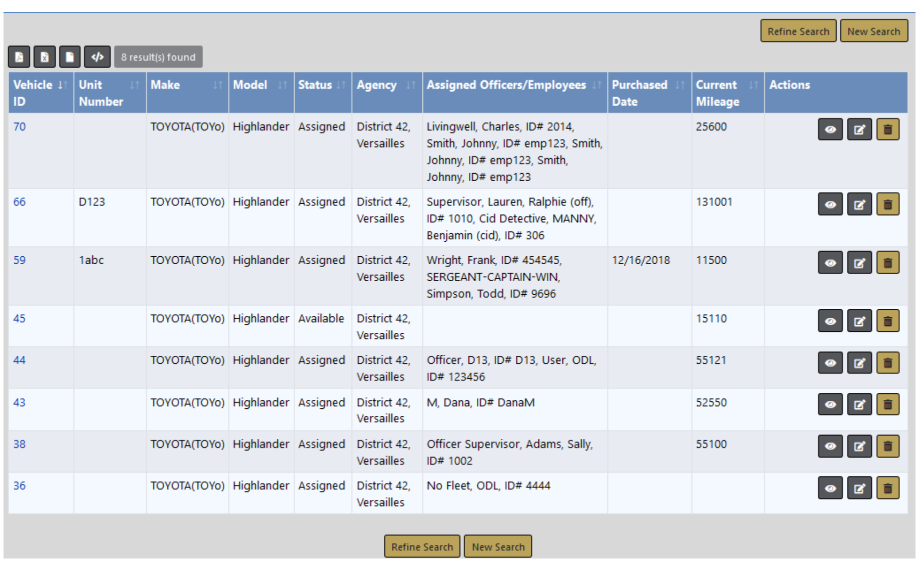
For example, a **Service Maintenance** record contains the total invoice amount of $100 for invoice number 1234, and there are two **Service Repair** records (tire repair $50 and oil change $50) that equal $100 for invoice number 1234.

To update a **Service Maintenance** record to a vehicle you must first **Search** for the vehicle, then edit the vehicle in the **Search Results** window.

1. Click on the **Manage Vehicles** button on the **Fleet Management** dashboard. For details on accessing the dashboard refer to "Fleet Manager" on page 676.

2. The **Fleet Vehicle Search** screen appears. Search for the vehicle. For instructions on how to search for vehicles refer to "Search Vehicles " on page 700.

   The results below are based on a search for a Toyota Highlander.



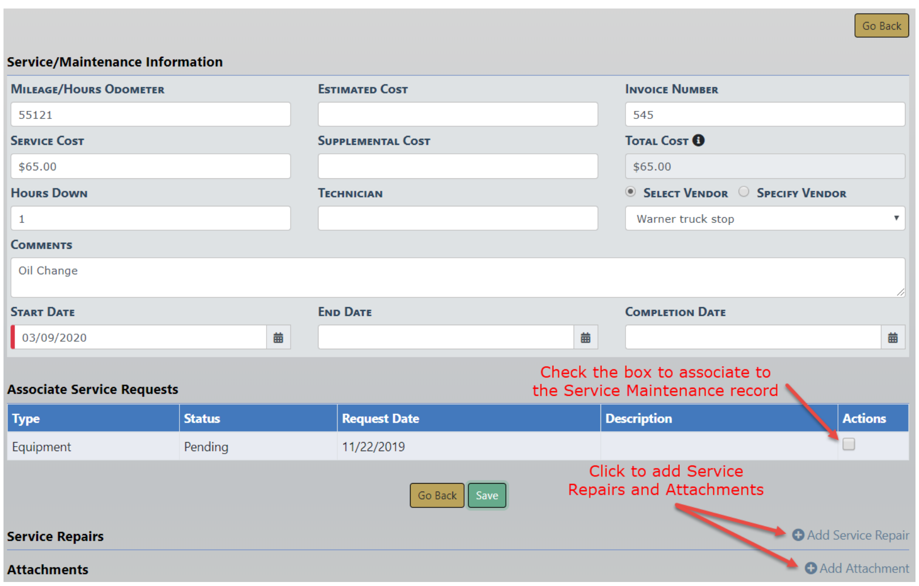
Vehicle ID	Unit Number	Make	Model	Status	Agency	Assigned Officers/Employees	Purchased Date	Current Mileage	Actions
70		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Livingwell, Charles, ID# 2014, Smith, Johnny, ID# emp123, Smith, Johnny, ID# emp123, Smith, Johnny, ID# emp123		25600	
66	D123	TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Supervisor, Lauren, Ralphie (off), ID# 1010, Cid Detective, MANNY, Benjamin (cid), ID# 306		131001	
59	1abc	TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Wright, Frank, ID# 454545, SERGEANT-CAPTAIN-WIN, Simpson, Todd, ID# 9696	12/16/2018	11500	
45		TOYOTA(TOYo)	Highlander	Available	District 42, Versailles			15110	
44		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Officer, D13, ID# D13, User, ODL, ID# 123456		55121	
43		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	M, Dana, ID# DanaM		52550	
38		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	Officer Supervisor, Adams, Sally, ID# 1002		55100	
36		TOYOTA(TOYo)	Highlander	Assigned	District 42, Versailles	No Fleet, ODL, ID# 4444			

3. Click the edit icon on the vehicle that needs the **Service Maintenance** updated.

4. Page down to the **Service/Maintenance Records** section of the **Edit Fleet Vehicle** window.

Service Maintenance records then appear in the grid as shown above. Select the **Edit** icon  on the maintenance record you want to update.

5. Make the necessary updates in the **Service/Maintenance Information** window. You may also add **Service Repair** records and **Attachments** (for detailed instructions refer to the "Add Service Maintenance and Repair" on page 730 section).



Note: The Fleet Manager can associate none, one, or multiple **Service Requests** to the **Service Record**. All selected **Service Requests** will become marked as **Complete**.

6. Click the **Save** button to save your changes, then click **Go Back** to return to the **Edit Fleet Vehicle** window.

Mid-Level Fleet Manager Overview

By having the **Mid-Level Fleet Manager** permission category, you can perform everything the Fleet Manager can do in the **Fleet Manager** module, except for the following:

- Cannot add vehicles.
- Cannot edit the primary vehicle fields.
- Cannot edit any custom fields associated with the vehicle.

For a permission category breakdown, refer to "Fleet Management Permission Categories" on page 675.

Fleet Officer

By having the **Fleet Officer** permission category, you can perform the following in the **Fleet Management** module:

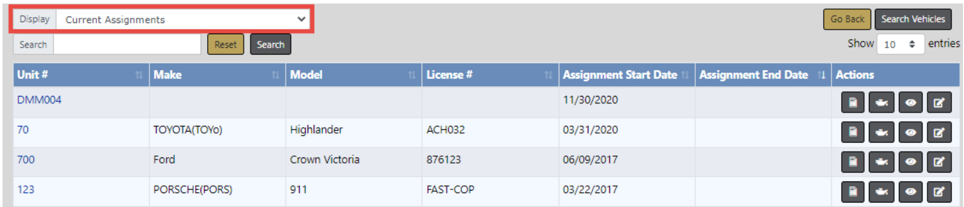
- View fleet vehicles currently or previously assigned to you.
- Search all vehicles regardless of the assignees.
- Assign a vehicle to yourself or add yourself to an existing assignment.
- You can create and edit Fuel & Oil records and Service Requests to your assigned vehicle.
- You can delete or edit Fuel/Oil/mileage records that you have created, but not records created by others.
- You can add an existing custom form to the vehicle.
- Add attachments to your assigned vehicle.

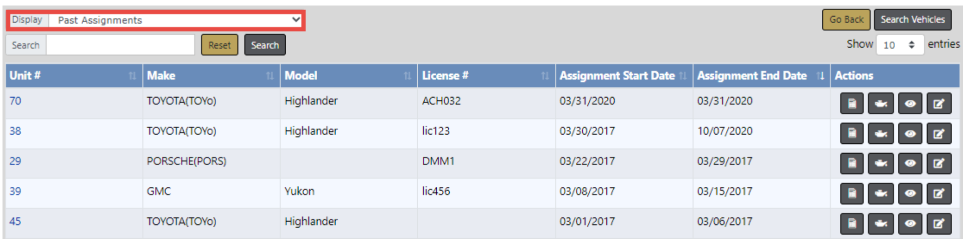
Note: Only Fleet Managers and Administrators have the ability to add, update, and delete Fleet Vehicles.

Below is an overview of the basic functionality:

1. Click on the **Records Management** menu then **Fleet Management** sub-menu to open the Fleet Management page.
2. Click the **Manage Vehicles** button to access **Fleet Vehicle Assignments**.

3. Vehicles *Currently assigned* to you display by default. You also have the option to change the *Display* to view vehicles *previously assigned* to you.

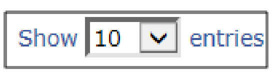




You may also search all vehicles, regardless of the officer assignment. Click on the **Search Vehicles** icon to display the **Fleet Vehicle Search** window.

For details on searching all vehicles refer to "Search All Vehicles " on page 739.

4. You can change the number of entries that appear in the grid. Click on the **Show Entries**  and select 10, 25, 50 or 100. The default is 10.



5. Click the  to view the record or  to edit.

6. Click the  icon , if available, to quickly add a custom form to the fleet vehicle without entering edit mode in step 5.

Note: This icon displays only when custom forms are available to add to the assignment.

For details on adding a custom form, refer to "Add Custom Forms to Fleet Vehicle and Assignments" on page 703.

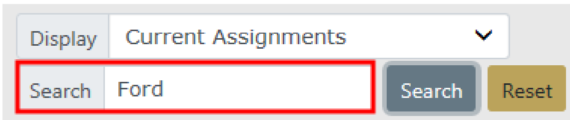
7. Click the icon  to quickly add Fuel/Oil/Mileage, if available, instead of entering edit mode in step 5.

   a. The Fuel/Oil/Mileage form opens.

b. Complete the form then click **Save**.

c. The Fuel/Oil/Mileage record then appears on the fleet vehicle record.

8. You can also optionally **Search** or filter Vehicle Assignments to return a list that only matches the entered text.



Enter the text you want to search on in the Search text box, then click the **Search** button or press **Enter** to display only records matching the entered text. The displayed list dynamically changes based on the entered text. For example, enter *Ford* to list only vehicles that contain the word Ford. Click **Reset** to remove the entered text and display all vehicles.

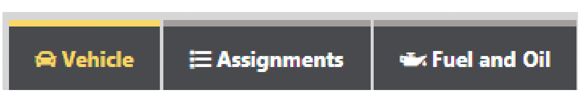
9. Click **Go Back** to return to the **Records Management** menu, from which to access the different Online RMS modules.

For information on **Records Management**, refer to "Records Management Button" on page 43.

View Vehicle

Click the **View** icon to view a particular vehicle record and the associated information. Information in the **View Fleet Vehicle** window is read-only and cannot be changed.

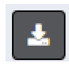
The **View Fleet Vehicle** window contains three tabs:

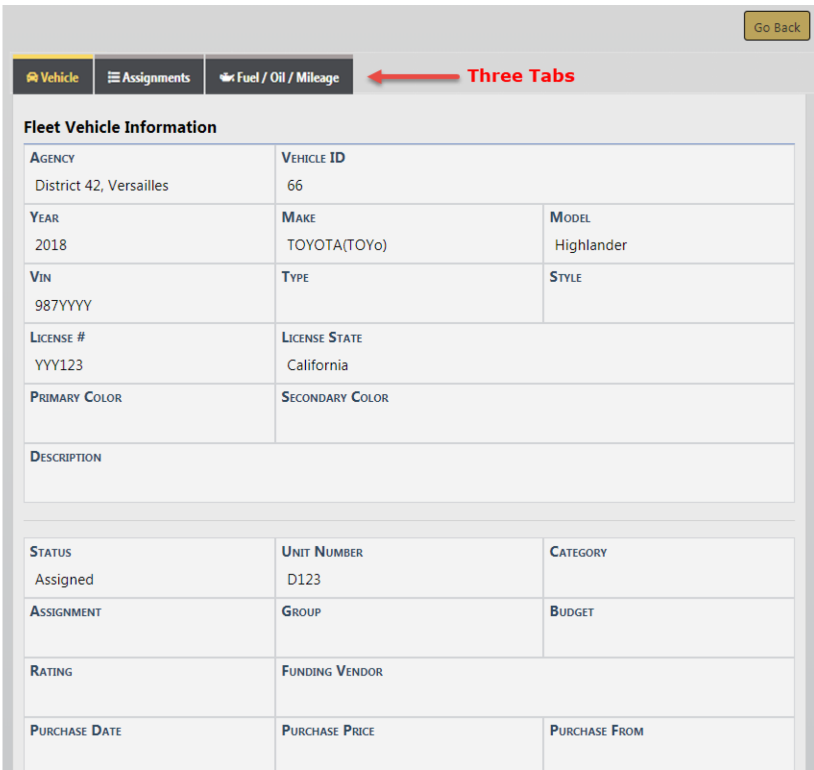


- Vehicle
  - Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. The **View Fleet Window** opens to this tab by default as shown in the above image.
- Assignments
  - A history of officers assigned to the vehicle, along with the dates.
- Fuel and Oil

- Summarization of the type of fluids put in the vehicle, along with the dates.

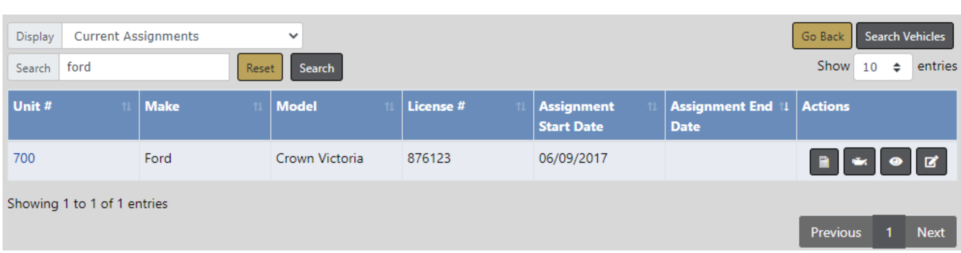
Click on the **Back** button to return to the **Fleet Vehicle Assignments** window. For your convenience, this button is located on the upper right of the window and on the lower center of the window.

Click on the download icon  in the *Attachment* section of *Vehicle* tab to download available documents or photos.



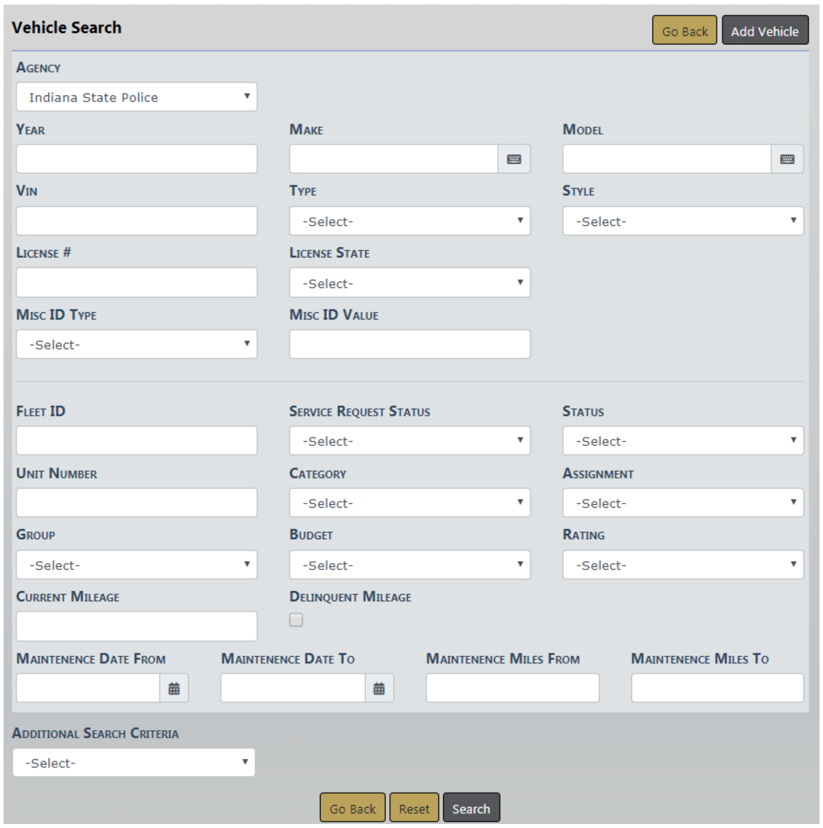
Search All Vehicles

1. Click the **Search Vehicles** button on the **Fleet Vehicle Assignments** window.

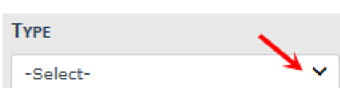


2. The **Fleet Vehicle Search** screen appears. Enter various pieces of information about the vehicle, such as VIN, Make, Model, etc.

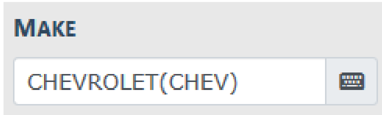
Note: The Agency of the vehicle defaults to the Agency of the logged in user; however, you can change it to any agency within the organization by clicking on the .



The fields with **-Select-** supply a specific list from which to choose. For example, to search for a vehicle **Type** of *Automobile* click on the and a list appears, then select from the drop-down list that appears.



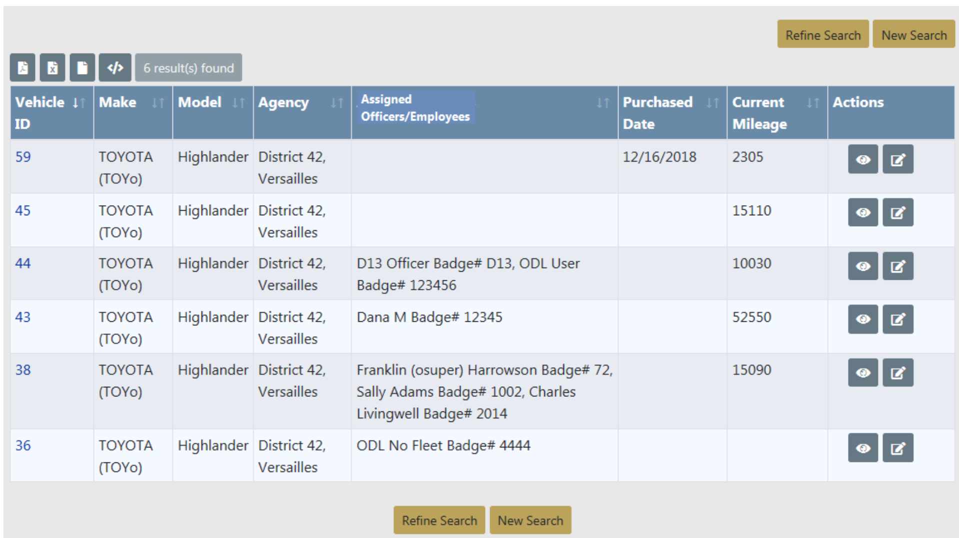
The fields with an on the right supply a list of available values based on data you type in the field. For example, click into the **Make** field and type *chev* to view a list of *chev* options from which to choose, then click on the option you want and it appears in the **Make** field.



Note You must select from the list that appears for the system to function as intended, even if you manually enter data into this field to narrow down your choices.

3. Either click **Reset** to clear all fields to start over, click **Go Back** to return to the **Fleet Vehicle Assignments** window, or click **Search** to display a list of existing vehicles that match the entered data.

   If you selected **Search** the results are displayed in a grid. The example below is a search result for **Make** *Toyota(Toyo)* and **Model** *Highlander* and **Agency** *District 42, Versailles*.



Refine Search New Search

6 result(s) found

Vehicle ID	Make	Model	Agency	Assigned Officers/Employees	Purchased Date	Current Mileage	Actions
59	TOYOTA (TOYo)	Highlander	District 42, Versailles		12/16/2018	2305	
45	TOYOTA (TOYo)	Highlander	District 42, Versailles			15110	
44	TOYOTA (TOYo)	Highlander	District 42, Versailles	D13 Officer Badge# D13, ODL User Badge# 123456		10030	
43	TOYOTA (TOYo)	Highlander	District 42, Versailles	Dana M Badge# 12345		52550	
38	TOYOTA (TOYo)	Highlander	District 42, Versailles	Franklin (osuper) Harrowson Badge# 72, Sally Adams Badge# 1002, Charles Livingwell Badge# 2014		15090	
36	TOYOTA (TOYo)	Highlander	District 42, Versailles	ODL No Fleet Badge# 4444			

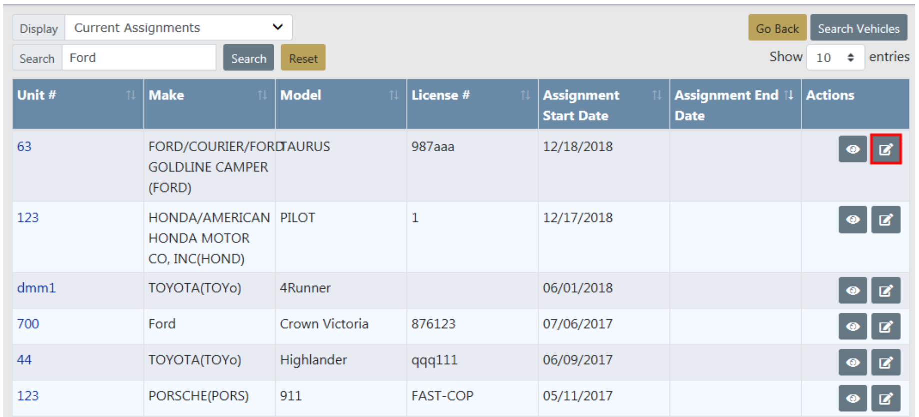
Refine Search New Search

   Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over, or click **Go Back** to return to the **Fleet Vehicle Assignments** window. Click on the Vehicle ID of the vehicle record to view details, or click on the *View* icon on the right as shown below.

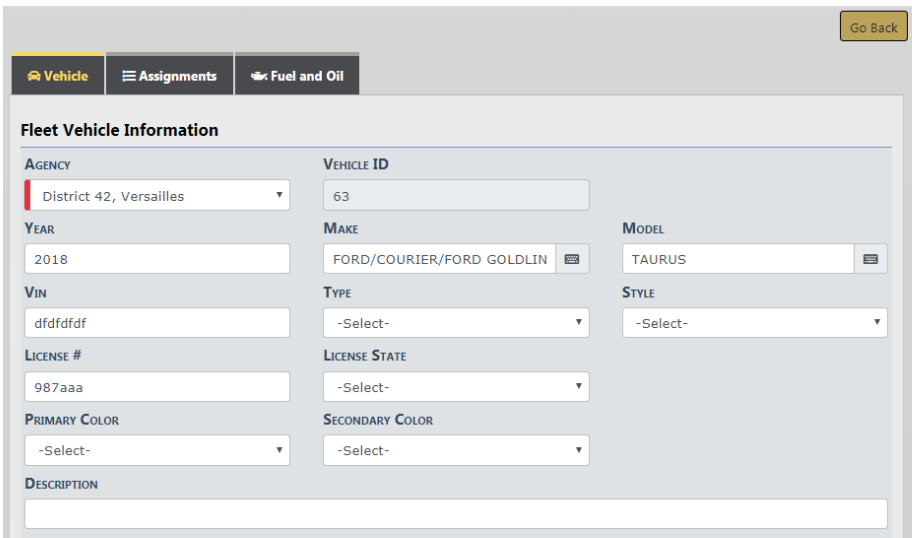
4. To export search results to a file refer to "Export Search Results" on page 36.

Add or Update Overview

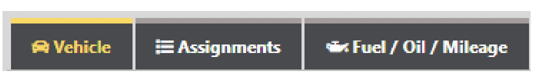
By having the **Fleet Officer** permission category, you can add, update, or delete *Fuel & Oil*, *Service Requests*, and *Attachments* to vehicles you are assigned. On the **Fleet Vehicle Assignments** window locate the vehicle you want to update, then click the edit icon.



The **Edit Fleet Vehicle** window appears.



The **Edit Fleet Vehicle** window contains three tabs:



Vehicle

- Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. This tab opens by default.

- You can add, update, or delete *Service Requests* and *Attachments* from this tab on records created by you.

Assignments

- A history of officers assigned to the vehicle, along with the dates. You can assign yourself to the vehicle, and update assignment dates and mileage on records created by you. You can also delete records created by you.

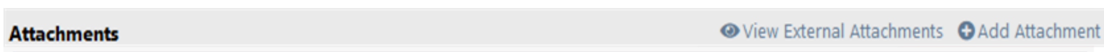
Fuel and Oil

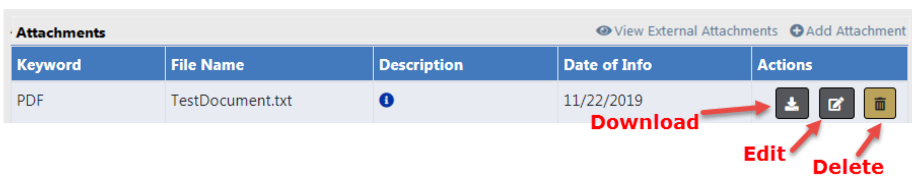
- A summary of the type of fluids put in the vehicle, along with the dates. Access this tab to add, update or delete fuel and oil records.

Click on the **Go Back** button to return to the **Fleet Vehicle Assignments** window.

Add and Update Attachments

Click on the appropriate icons to *Add*, *Edit*, *Delete*, and *Download* **Attachments**.

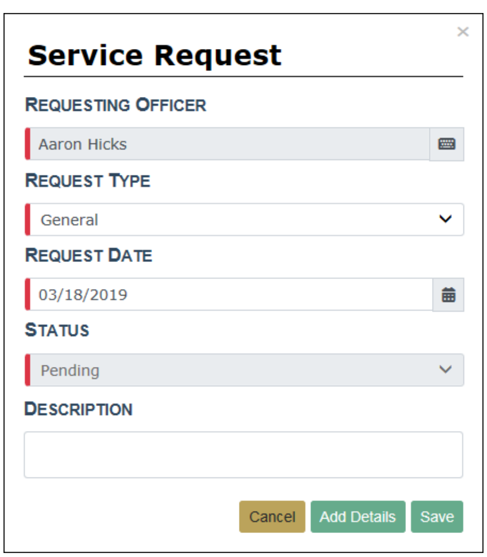




For more information on adding, editing, and deleting attachments, refer to "Attachments" on page 69.

Add a Service Request

1. From the **Edit Fleet Vehicle** window, click on the *Add Service Request* link to open the **Service Request** window.



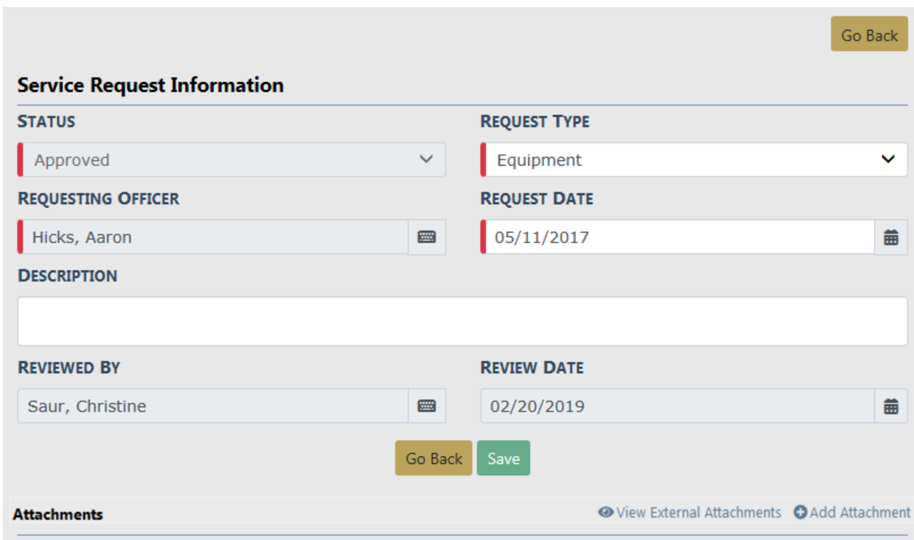
Select the *Request Type*, *Request Date*, and enter a *Description*.

Note: The *Requesting Officer* and *Status* cannot be changed.

2. Click **Save** to save the **Service Request** or click **Add Details** to add images and attachments. Click **Cancel** to exit without saving.

   Note: Service Request attachments do not appear in the Attachments grid of **the Edit Fleet Vehicle** window. To view Service Request attachments you must open the **Service Request**.

3. If you chose to **Add Details**, enter the necessary information on the **Edit Service Request** screen then click **Add Attachment** to upload files.



Note: **Requesting Officer** defaults to the current user and can only be changed by the Fleet Manager. The **Status**, **Reviewed By** and **Review Date** cannot be changed.

A notification is sent to the Fleet Manager when the **Service Request** is saved.

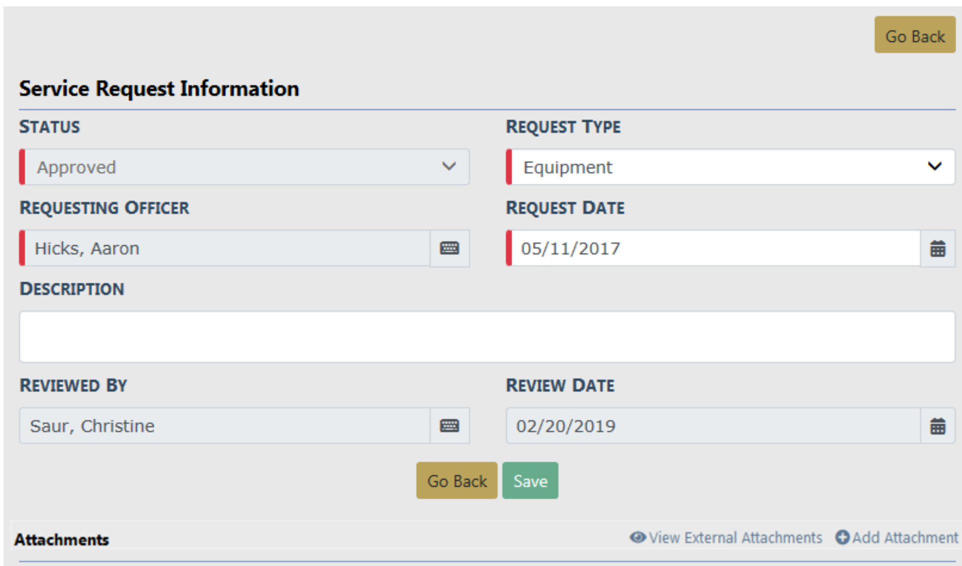
For further instructions on adding Attachments refer to "Add and Update Attachments " on the previous page.

Update Service Requests

1. From the **Edit Fleet Vehicle** window, locate the **Service Request** record to update and click the edit icon.

Note: You can update **Service Requests** that were created by you. The edit icon does not display on **Service Requests** that have been set up by someone else.

2. Modify the values as needed.



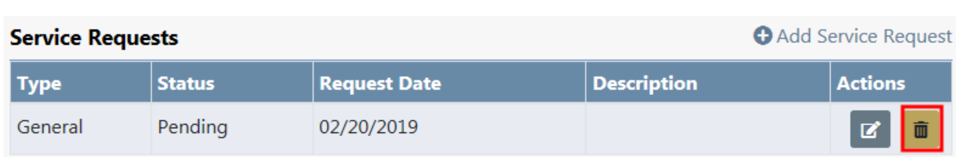
Note: The **Requesting Officer**, **Status**, **Reviewed By** and **Review Date** cannot be changed.

3. Click **Save** to save the updated information, or click **Go Back** to return to the previous screen without saving the updates.

4. Optionally add, edit or delete Attachments. For detailed instructions refer to "Add and Update Attachments " on page 743.

Delete Service Requests

1. From the **Edit Fleet Vehicle** window, locate the **Service Request** to delete then click the Delete icon .



Note: You can delete **Service Requests** that were created by you. The Delete icon does not display on **Service Requests** that have been set up by someone else.

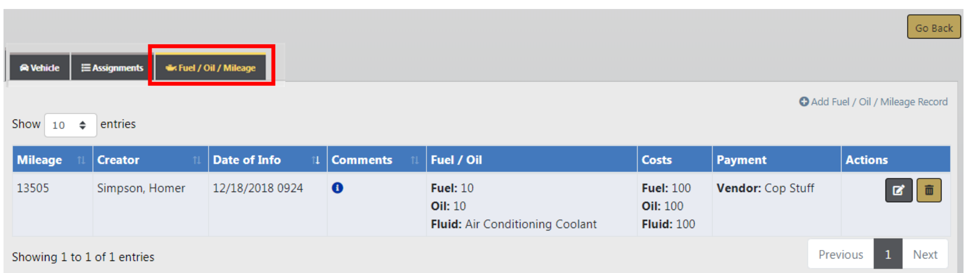
For further details on how to delete refer "Delete Data " on page 753.

Manage Fuel, Oil, and Mileage

By having the **Fleet Officer** permission category, you can add, update, or delete *Fuel/Oil/Mileage* records that are assigned to you. However, the ability to update or delete may vary, depending on whether or not your agency is utilizing the lock hours feature, or you always have edit fuel and oil permissions.

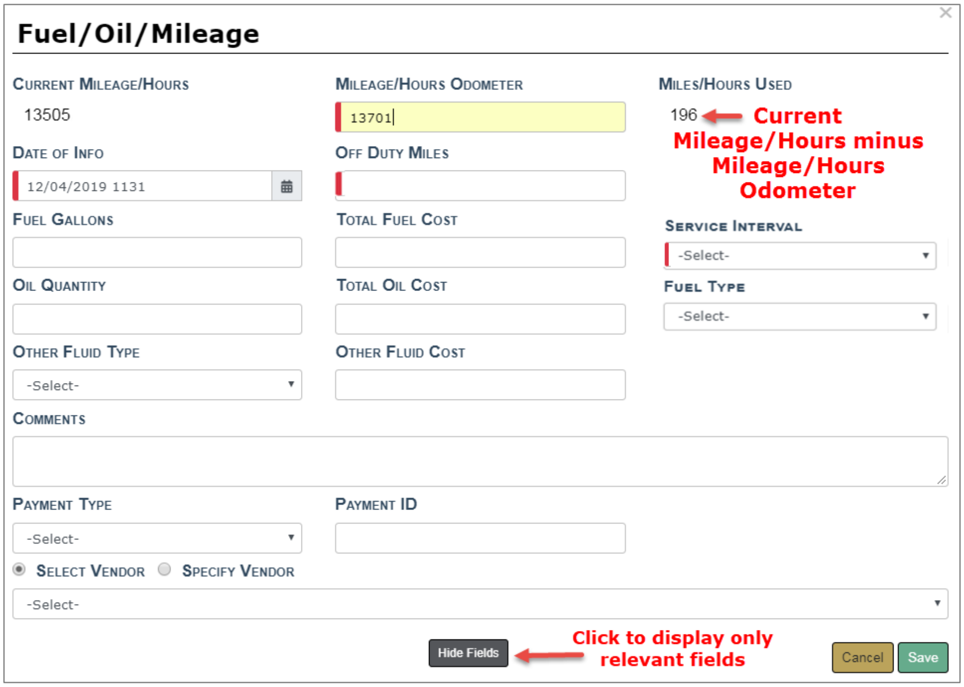
For example, when the lock hours are set to 100, you can edit the record if you are the creator, and today is within 100 hours of record creation.

Note: Fleet Managers may update and delete fuel, oil & Mileage records, regardless of the configured lock hours.



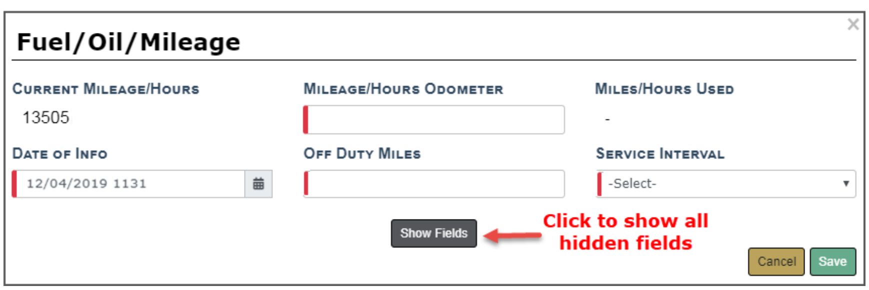
Add Fuel, Oil, and Mileage

1. Click on *Add Fuel / Oil / Mileage Record* on the **Fuel/Oil/Mileage** tab to add a new record, then enter the relevant information.



Note: The **Current Mileage** displayed on the *Vehicle Tab* looks at service maintenance records (excluding crash report service maintenance records) and fuel/oil/mileage records to find the max mileage entered for the vehicle.

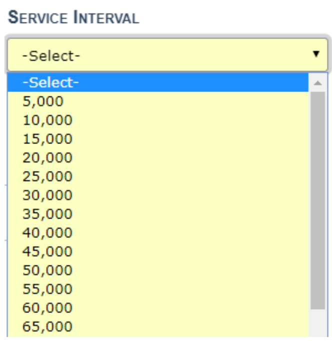
Optionally, click the **Hide Fields** button to display only relevant fields for which you need to supply data.



Click the **Show Fields** button to display all hidden fields.

- The *Current Mileage/Hours* and *Miles/Hours Used* fields are both read-only.
- Fields with a down arrow  supply a list of values from which to choose. Click on the field then choose from the list that appears.
- If applicable, the **Vendor** gives you the option to *Select* a value from a list, or *Specify* your own Vendor. Click on one of the options, then select or enter your answer in the text field provided.

- **Service Interval** allows you to select the number of miles until the next service. The list values are configured by the agency. For details, refer to your administrator.

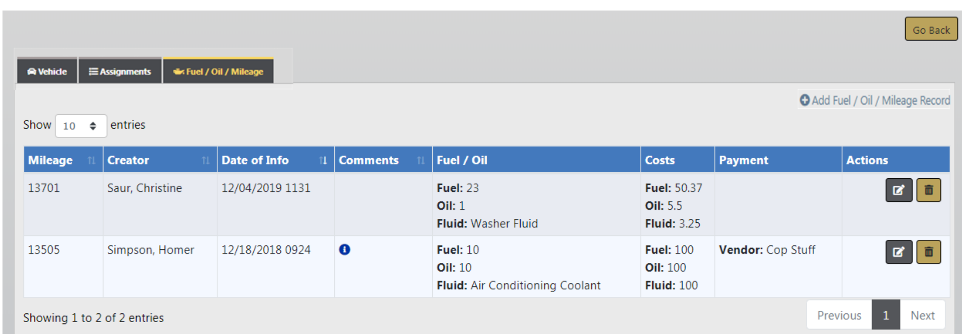


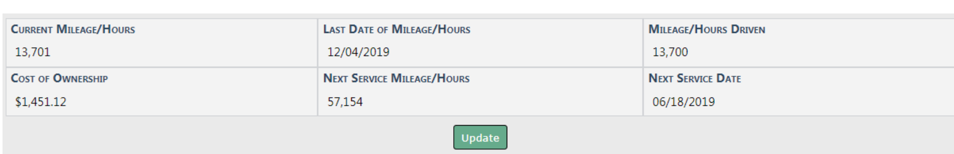
2. Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Milage** tab without saving.

3. The record appears under the **Fuel/Oil/Mileage** tab of the **Edit Fleet Vehicle** screen.

   The **Current Mileage** displayed on the **Vehicle Tab** reflects the *Mileage* entered on the most recent Fuel and Oil record, and on the **Fleet Vehicle Search Results** screen.

   The **Cost of Ownership** displayed on the **Vehicle Tab** reflects the *Purchase Price + All Fuel & Oil Costs + All Service Maintenance Costs* entered for the vehicle.





Edit Fuel, Oil, and Mileage

You can edit fuel, oil, and mileage records under the following conditions:

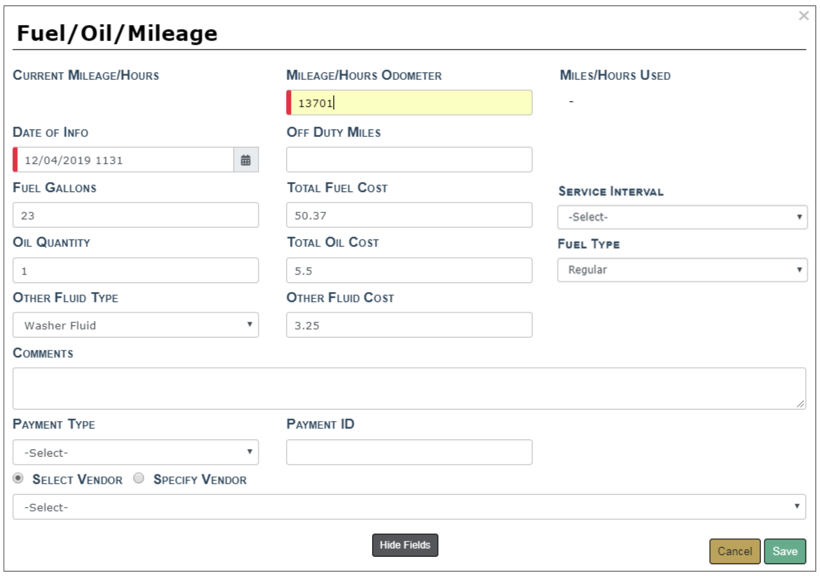
- You are the creator of the record and the system time is within the configured lock hours of the creation date.

For example, when the lock hours are set to 100, you can edit the record if you are the creator, and today is within 100 hours of record creation.

For more information on lock hours, refer to your agency administrator.

- Or, you always have edit fuel, oil, and mileage permissions.

1. Click on the edit icon and apply the necessary updates.



Note: As a Fleet Officer you cannot update or delete **Fuel, Oil, Mileage** records created by another user.

Optionally, click the **Hide Fields** button to display only relevant fields for which you need to supply data.

2. Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Mileage Tab** without saving.

Delete Fuel, Oil, Mileage

You can delete records under the following conditions:

- You are the creator of the record and the system time is within the configured lock hours of the creation date.

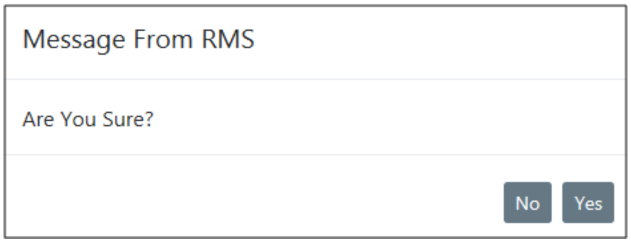
  For example, when the lock hours are set to 100, you can delete the record if you are the creator, and today is within 100 hours of record creation.

  For more information on lock hours, refer to your agency administrator.

- Or, you always have delete fuel/oil/mileage permissions.

1. Click on the delete icon to delete a Fuel/Oil/Mileage Record.

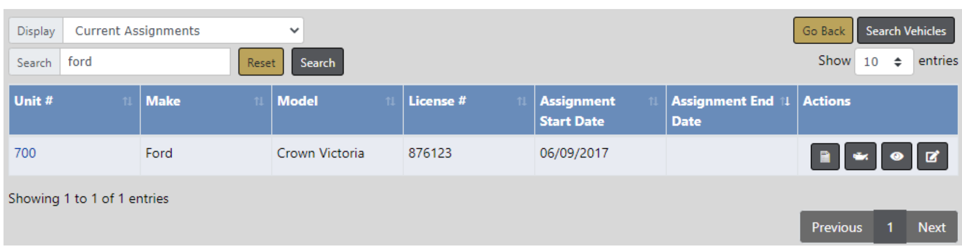
2. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Fuel/Oil/Mileage** window without deleting.



Self-Assign Vehicles

As Fleet Officer you can assign yourself to vehicles that are not on your **Current Assignment** list by searching for the vehicles first.

1. Click the **Search Vehicles** button on the **Fleet Vehicle Assignments** window list.



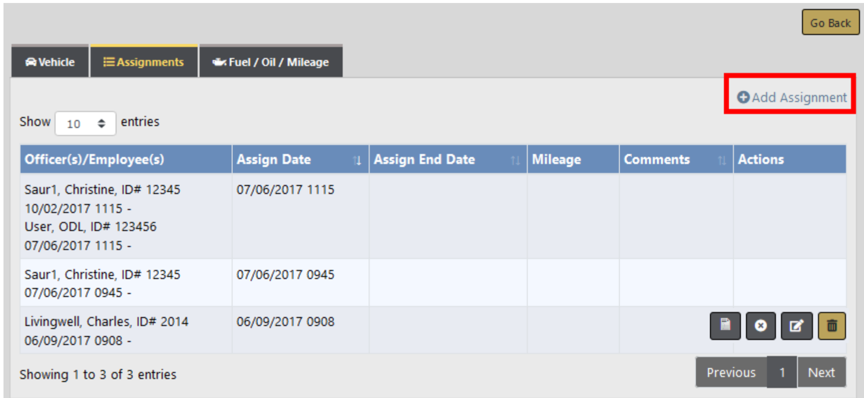
2. Enter the vehicle details into the **Fleet Vehicle Search** window then click **Search**. For detailed instructions on how to search for vehicles refer to "Search All Vehicles " on page 739.

3. Click the edit icon to the right of the vehicle in the **Fleet Vehicle Search Results** window you want to assign.

   Note: Vehicles with a status of *Sold* or *Out of Service* cannot be edited by an officer.

   With permissions, you can click to quickly add a custom form to a fleet vehicle from the *Fleet Vehicle Search Results*. For more information, refer to "Add Custom Forms to Fleet Vehicle and Assignments" on page 703.

4. Click on the **Assignments** tab from the **Edit Fleet Vehicle** window.

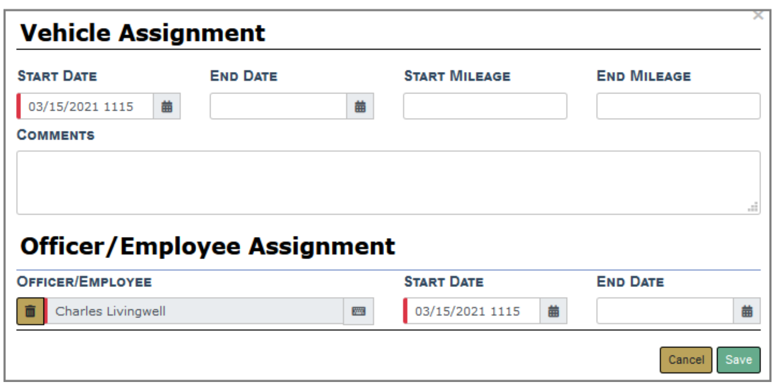


Click **Go Back** to return to the **Fleet Vehicle Search Results** window, if you wish.

5. Officers can be assigned two ways: Add yourself to new or existing assignment.

Add Yourself to a New Assignment

a. Click on *Add Assignment* on the **Edit Fleet Vehicle** window to create a new assignment and enter the necessary data.



The **Officer/Employee** defaults to you and cannot be changed.

b. Enter your **Start Date** if different than the default.

c. Click **Save** to create the assignment, or click **Cancel** to return to the **Assignments Tab** without saving.

Add Yourself to an Existing Assignment

a. Locate the Assignment in the **Edit Fleet Vehicle** window, then click the edit icon to display the *Officer/Employee Assignment* window.

The bottom **Officer/Employee** defaults to you and cannot be changed. Other fields in gray cannot be changed.

b. The **Start Date** defaults to the current date but may be changed.

c. Enter the **End Date** and **Comments**, if applicable.

Note: To end the Assignment, there must be an **End Date** on the Assignment itself.

d. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.

Note: You can create or edit *Fuel and Oil* and *Service Requests* for the vehicle once you have assigned yourself to the vehicle. For details refer to "Manage Fuel, Oil, and Mileage" on page 746.

Your new assignment puts the vehicle in ODL and sets status to *Assigned*. The new assignment also appears in your **Current Assignments** window.

End Self-Assignments

To close an entire Assignment that you assigned to yourself, you must enter the **End Date** on both the *Vehicle Assignment* and *Officers/Employee Assignment* sections. You cannot close an Assignment that was created by another user.

Note: The End Dates must be on or before the Assignment End Date.

6. Click **Save** to apply the changes, or click **Cancel** to return to the **Assignment Tab** without saving.

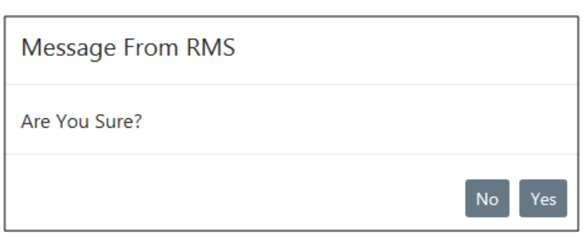
Delete Assignments

You may delete assignments that are created by you, and only when you are the only officer on the assignment.

1. Locate the assignment to delete then click on the Delete icon .

Note: You do not have the authority to delete assignments without a Delete icon under the *Actions* column.

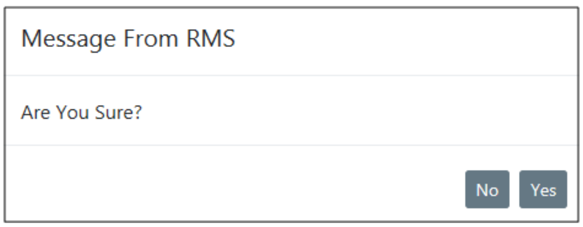
2. A confirmation window appears. Click **Yes** to delete or **No** to exit without deleting.



Delete Data

Click the Delete icon to delete records that were created by you. If the Delete icon does not exist, then you do not have the ability to delete. While Service Requests are used in the example below, the same procedure applies to other areas of the application.

The following confirmation screen appears.



Click **Yes** to delete or **No** to return to the previous window without deleting.

Fleet Clerk

By having the **Fleet Clerk** permission category, you can perform the following in the **Fleet Management** module:

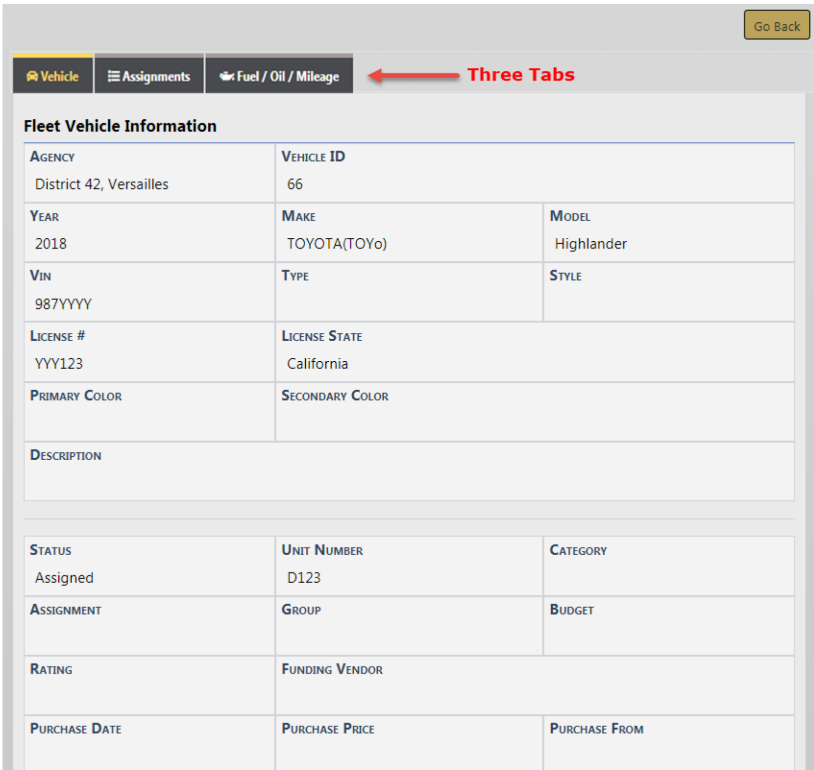
- View fleet vehicles.
- You can add fuel, oil & mileage records to fleet vehicle records.
- You can edit fuel, oil & mileage records only if you are the creator and only within the lock hours.

Note: Fleet Managers and Administrators have the ability to add, update, and delete Fleet Vehicles that were created by others if given appropriate permissions.

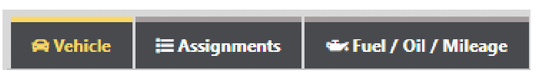
To access Fuel, Oil, & Mileage:

1. Click on the **Records Management** menu then **Fleet Management** sub-menu to open the Fleet Vehicle Search page.
2. Search for and select the Vehicle.

Note: For more information on searching and selecting, refer to "Search Vehicles" on the facing page.



The **View Fleet Vehicle** window contains three tabs:



Vehicle

- Detailed information about the vehicle itself, such as license number, purchase price, make and model, current mileage, etc.; maintenance records; associated equipment; and service requests with statuses. This tab opens by default.

Assignments

- A history of officers assigned to the vehicle, along with the dates.

Fuel/Oil/Mileage

- A summary of the type of fluids put in the vehicle with dates, along with mileage. Access this tab to add records, or update records if you are the creator and only if within the lock hours.

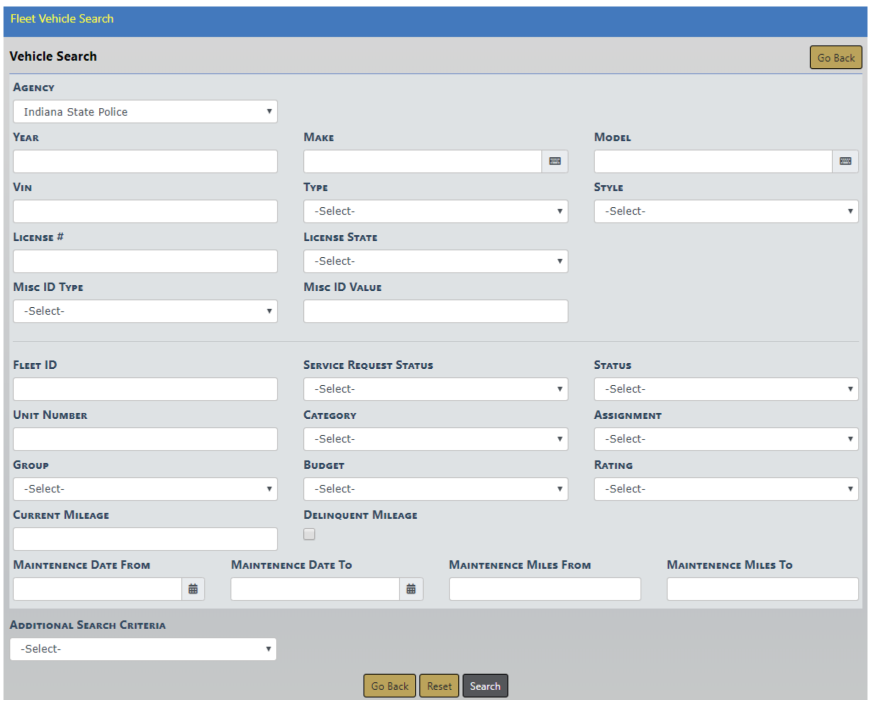
Note: The Vehicle and Assignment tabs are read-only.

Click on the **Fuel/Oil/Mileage** tab to add, update, or delete records. Refer to "Search Vehicles" below for details.

Or, click on the **Go Back** button to return to the previous window.

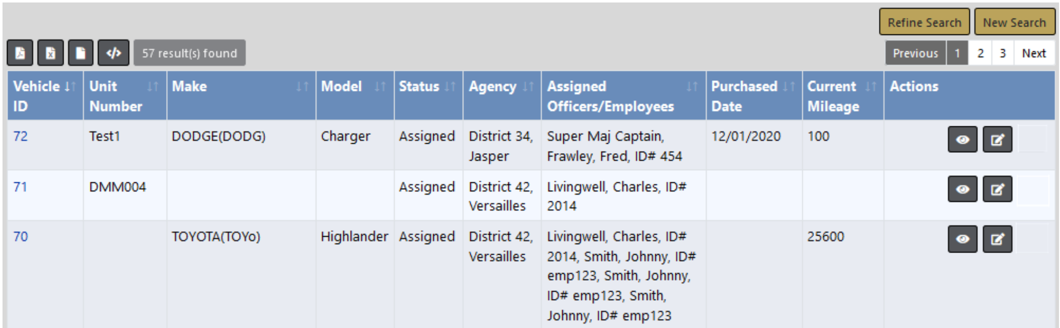
Search Vehicles

1. Click on the **Records Management** menu then **Fleet Management** sub-menu to open the Fleet Vehicle Search page.



Note: The Agency of the vehicle defaults to the Agency of the logged in user; however, you can change it to any agency within the organization by clicking on the  .

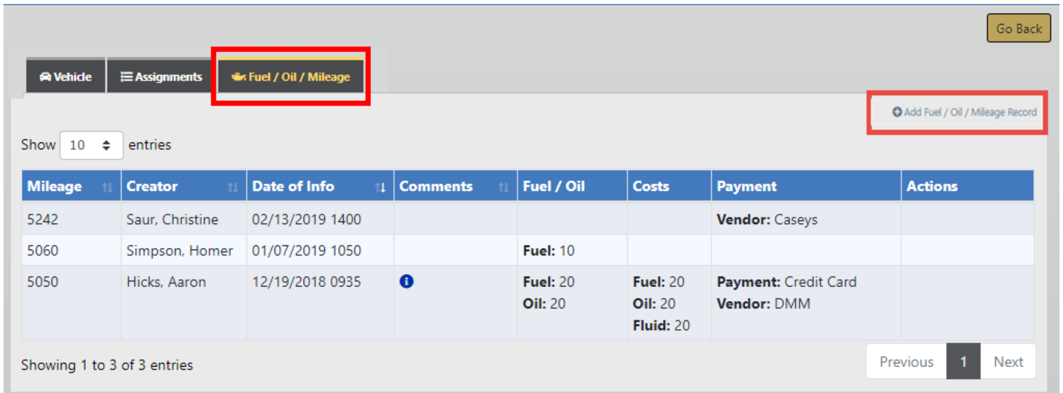
2. Enter various pieces of information about the vehicle, such as VIN, Make, Model, etc., then click **Search** to display the results.

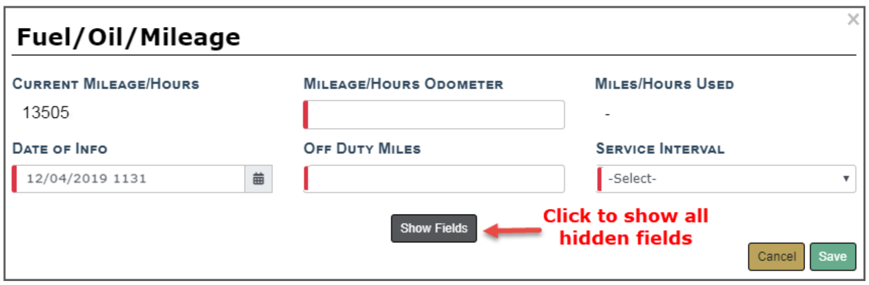


Add Fuel , Oil, and Mileage

1. Locate the vehicle you want to edit then click on the *Edit* icon in the Actions column of the Search Results window to open the Edit Fleet Vehicle page.

2. Click on the **Fuel/OilMileage** tab, then click **Add Fuel/Oil/Mileage Record** to add a new record.

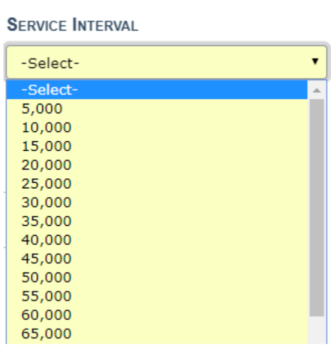




Only relevant fields for which you need to supply data display automatically.

Click the **Show Fields** button to display all available fields.

- The *Current Mileage/Hours* and *Miles/Hours Used* fields are both read-only.
- Fields with a down arrow supply a list of values from which to choose. Click on the field then choose from the list that appears.
- **Service Interval** allows you to select the number of miles until the next service. The list values are configured by the agency. For details, refer to your administrator.

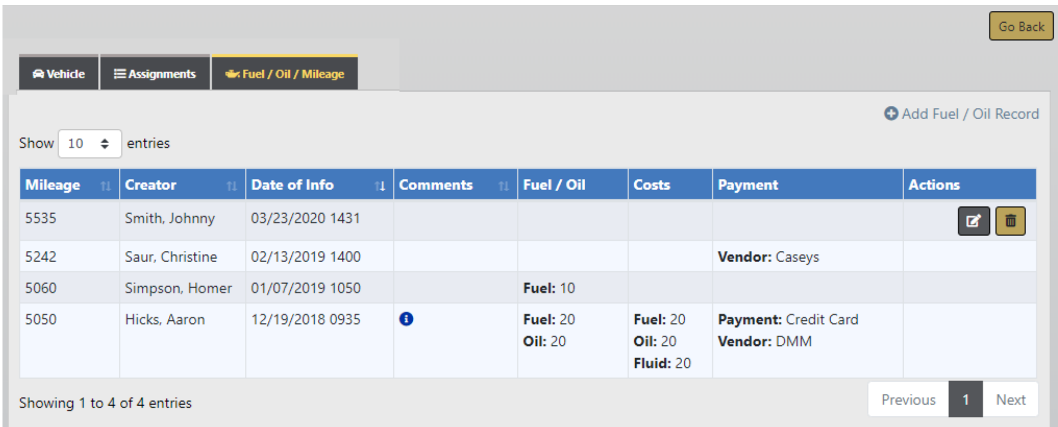


3. Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Mileage** tab without saving.

4. If you chose to click **Save**, the record appears under the **Fuel/Oil/Mileage** tab of the **Edit Fleet Vehicle** screen.

   The **Current Mileage** looks at service maintenance records and fuel/oil/mileage records to find the max mileage entered for the vehicle.

   The **Cost of Ownership** displayed on the **Vehicle Tab** reflects the *Purchase Price + All Fuel & Oil Costs + All Service Maintenance Costs* entered for the vehicle.



Mileage	Creator	Date of Info	Comments	Fuel / Oil	Costs	Payment	Actions
5535	Smith, Johnny	03/23/2020 1431					
5242	Saur, Christine	02/13/2019 1400				**Vendor:** Caseys	
5060	Simpson, Homer	01/07/2019 1050		**Fuel:** 10			
5050	Hicks, Aaron	12/19/2018 0935		**Fuel:** 20 **Oil:** 20	**Fuel:** 20 **Oil:** 20 **Fluid:** 20	**Payment:** Credit Card **Vendor:** DMM	

   The *Edit* and *Delete* icons appear on fuel/oil/mileage records to which you have appropriate permissions.

Edit Fuel , Oil, and Mileage

You can edit records under the following conditions:

- You are the creator of the record and the system time is within the configured lock hours of the creation date.

  For example, when the lock hours are set to 100, you can edit the record if you are the creator, and today is within 100 hours of record creation.

  For more information on lock hours, refer to your agency administrator.

- Or, you always have edit fuel and oil permissions.

1. Click on the edit icon and apply the necessary updates.
2. Click **Save** to apply the changes, or click **Cancel** to return to the **Fuel/Oil/Mileage Tab** without saving.

Delete Fuel , Oil, and Mileage

You can delete records under the following conditions:

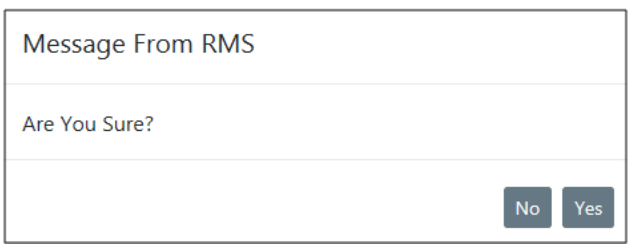
- You are the creator of the record and the system time is within the configured lock hours of the creation date.

  For example, when the lock hours are set to 100, you can delete the record if you are the creator, and today is within 100 hours of record creation.

  For more information on lock hours, refer to your agency administrator.

- Or, you always have delete fuel and oil permissions.

1. Click on the delete icon to delete a Fuel/Oil/Mileage Record.
2. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Fuel/Oil/Milage** window without deleting.



Chapter 34. Lost and Found Property

Lost and Found Property Overview

The **Lost and Found Property** module allows you to create, save, and edit *Master Property* records and mark them as lost. The **Lost and Found Property** module is included with the full subscription of Online RMS, though it is disabled for initial deployment. Please contact Caliber Support if your agency would like this module enabled.

When the module is enabled, user access is controlled by permissions configured by your administrator. For more information on permissions see your administrator.

This module utilizes the **Master Property Index**, where property data is represented only once for consistency. **Master Property** data is easily transferred to a new **Lost and Found Property** record by searching the **Master Property Index** for the appropriate property record. For more information on **Master Indicies** refer to "Master Indices" on page 83.

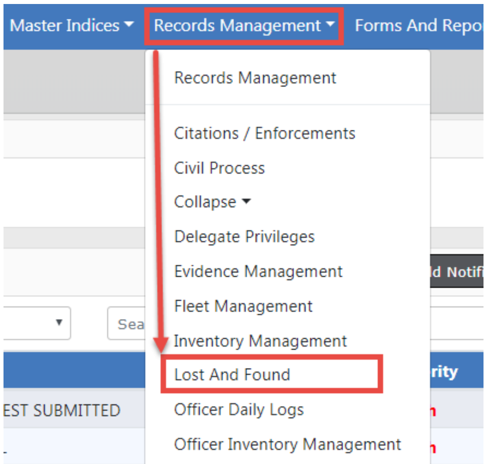
Lost and Found Property can be created and managed two ways within Online RMS:

- From the **Standalone Module** by selecting the *Lost and Found* option under the *Records Management Menu*.
- **Incident Lost and Found Property** (similar to logging property as evidence or held property).

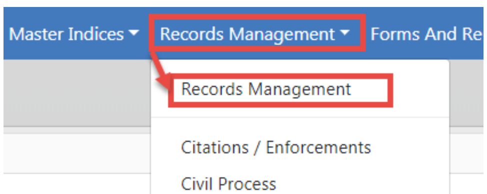
Standalone Module

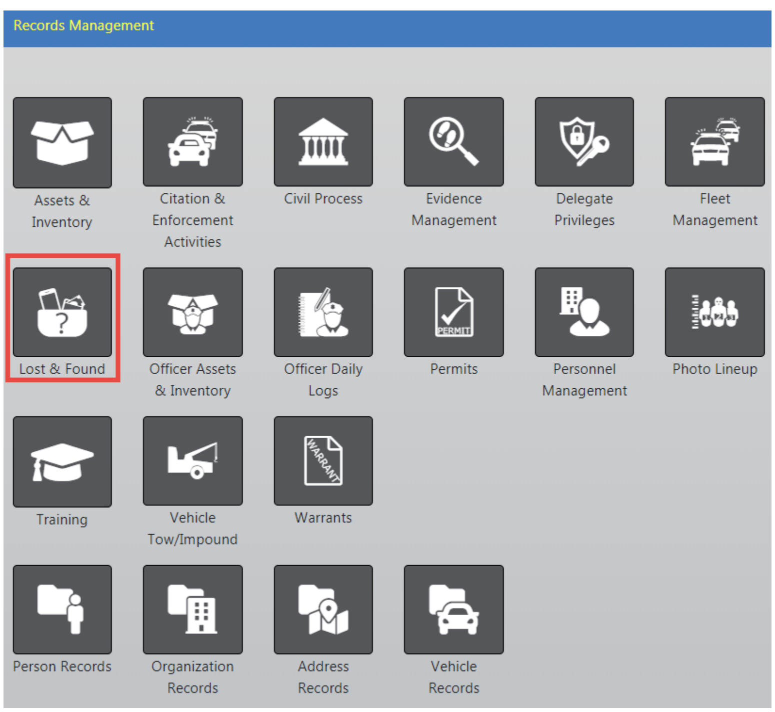
There are two ways to access the **Lost & Found** Standalone Module:

- Click the **Records Management Menu** then click the **Lost and Found** submenu option.

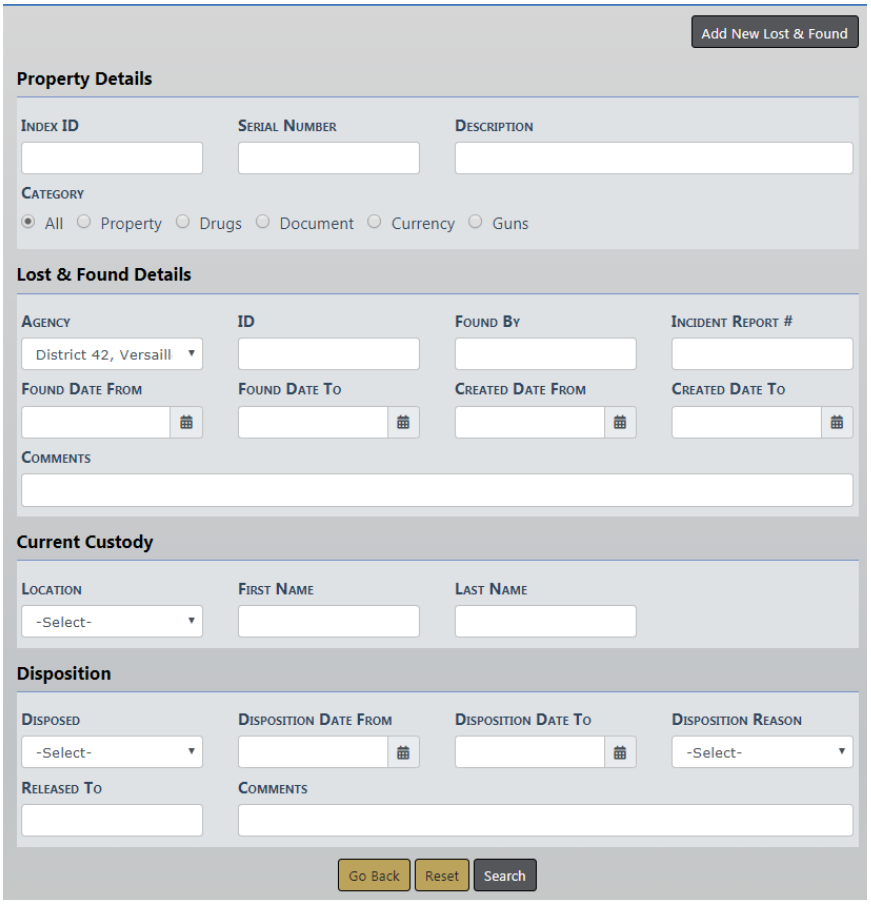


- Click on the **Records Management Menu** then click on the **Lost & Found** link.





The *Property Lost & Found Search* screen appears. Click on the **Add New Lost & Found** button to create a new **Lost & Found** record if necessary.

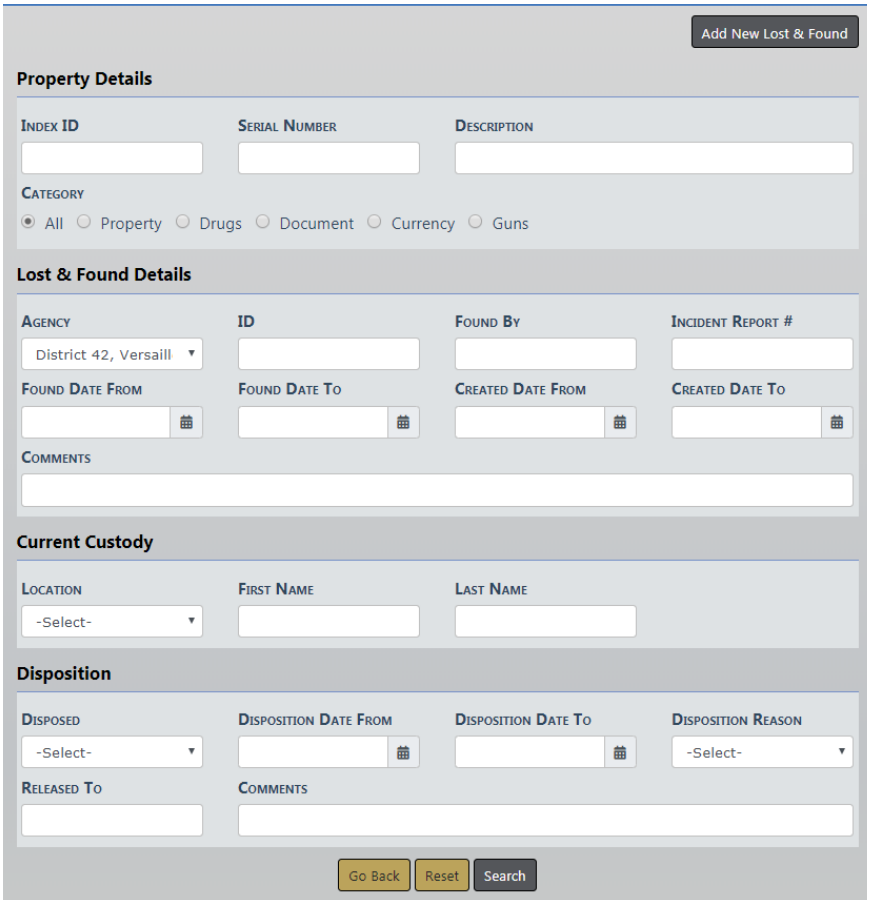


For more information on searching **Lost & Found** records refer to"Search Lost and Found Property" below .

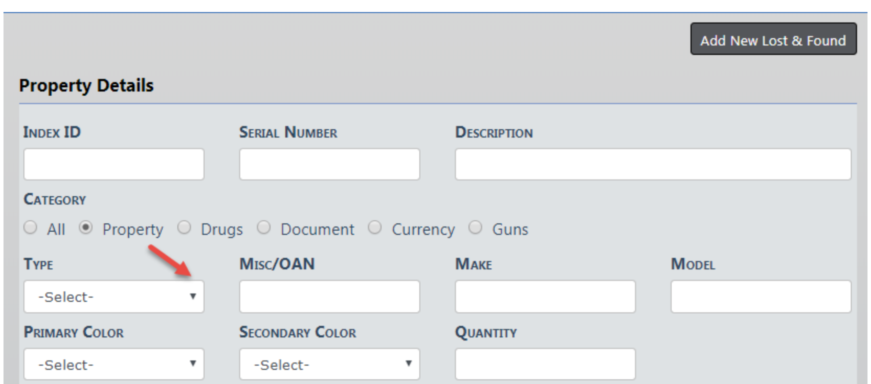
Search Lost and Found Property

Access the **Lost & Found** Standalone Module to begin the search. For more information on accessing the module refer to "Standalone Module" on page 761.

The *Property Lost & Found Search* screen appears.



Choose one **Category** to display additional search fields. The search fields change based on the selected **Category**.



Enter all search criteria then click the **Search** button to view the *Search Results*.

Click **New Search** to start a new search, or **Refine Search** to modify your search.

You can **Export** the *Search Results* to a file by clicking on one of the export icons. For more information on exporting *Search Results* refer to "Export Search Results" on page 36.

From the *Search Results* window you can handle one record, or multiple records at once.

Specific Record

Dispose, **Edit**, or **Delete** a specific record.

If an icon does not appear in the *Actions* column then you do not have proper permissions to perform that *Action*. For example, if the **Dispose** icon does not appear then you do not have permissions to **Dispose** that record. For more information on permissions refer to your administrator.

Multiple Records

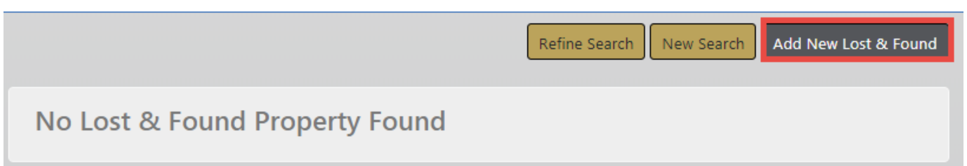
Online RMS provides a function to process multiple **Lost & Found** records at once. **Mass Dispose**, **Mass Change Custody**, and **Print Labels** buttons appear when one or more records on the *Property Lost & Found Search Results* screen are selected. Click one of the three buttons to process all selected records.

For more information on processing records in bulk refer to "Mass Lost and Found Functions" on page 774.

Add Lost and Found Property

Before you add a new record, first search to ensure it doesn't already exist. For more information on searching, refer to "Search Lost and Found Property" on page 763

The search results displays a message when the record you are searching for does not exist.

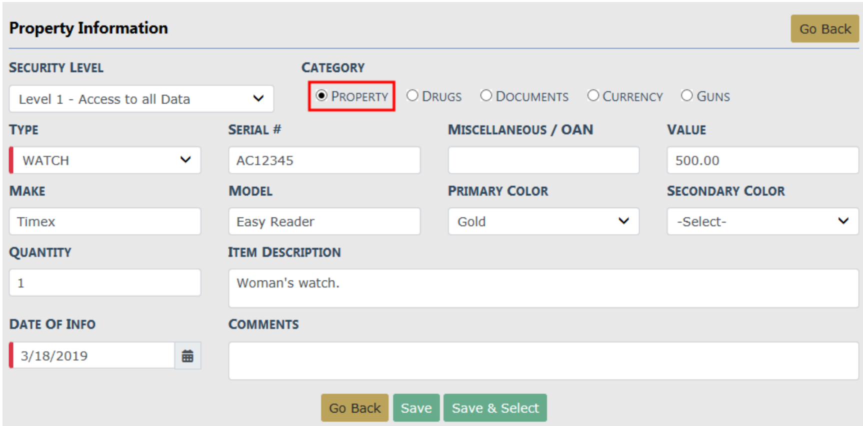


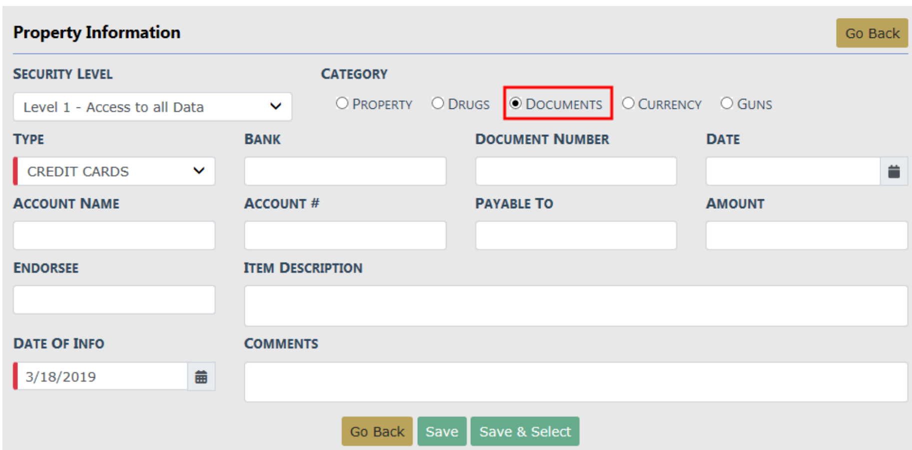
Create a New Master Property Index Record

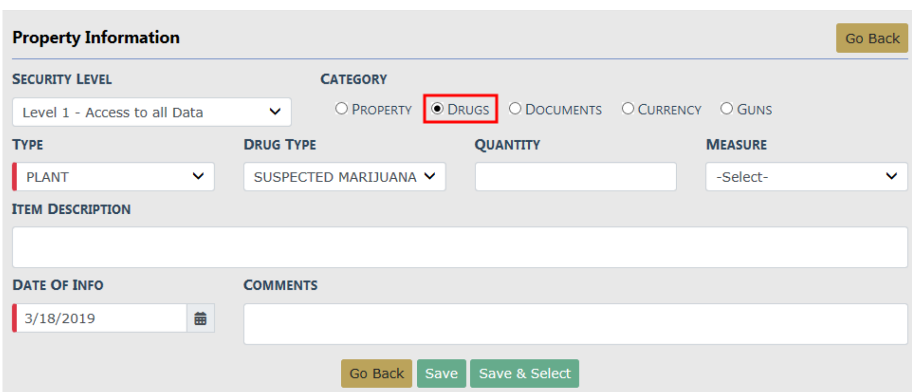
If the record you are searching for does not appear in the *Lost & Found Search Results* then it's likely it does not exist in the index, so you need to create it.

Click on the **Add New Lost & Found** button on the top right of the *Lost & Found Search Results* window to display the *Add Property* screen.

Choose one **Category** on the *Add Property* screen. Additional fields appear based on the selected **Category** as shown in the below examples.



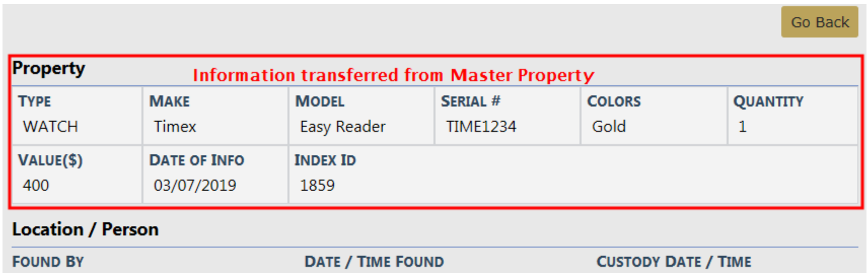




Enter the necessary data. then click **Save & Select** to transfer the newly added record to a new *Lost & Found* record.

Create the Property Lost & Found Record

The new property record you just created transfers into the **Add Property Lost & Found** screen.



Enter the remaining lost and found information then click **Save** to open the *Edit Lost & Found* screen.

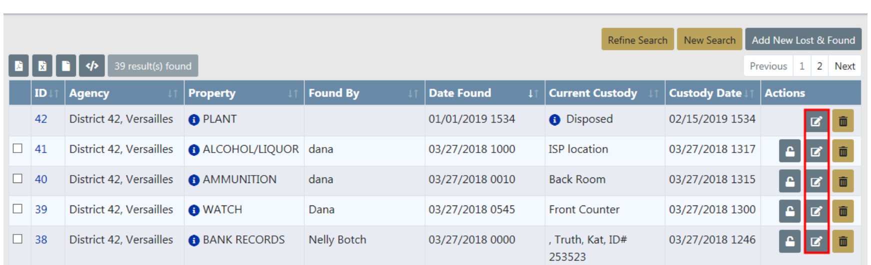
For more information on editing lost and found records, refer to "Edit Lost and Found Property" below.

Edit Lost and Found Property

Access the **Lost & Found** Standalone Module then search for the record(s) you want to **Edit**.

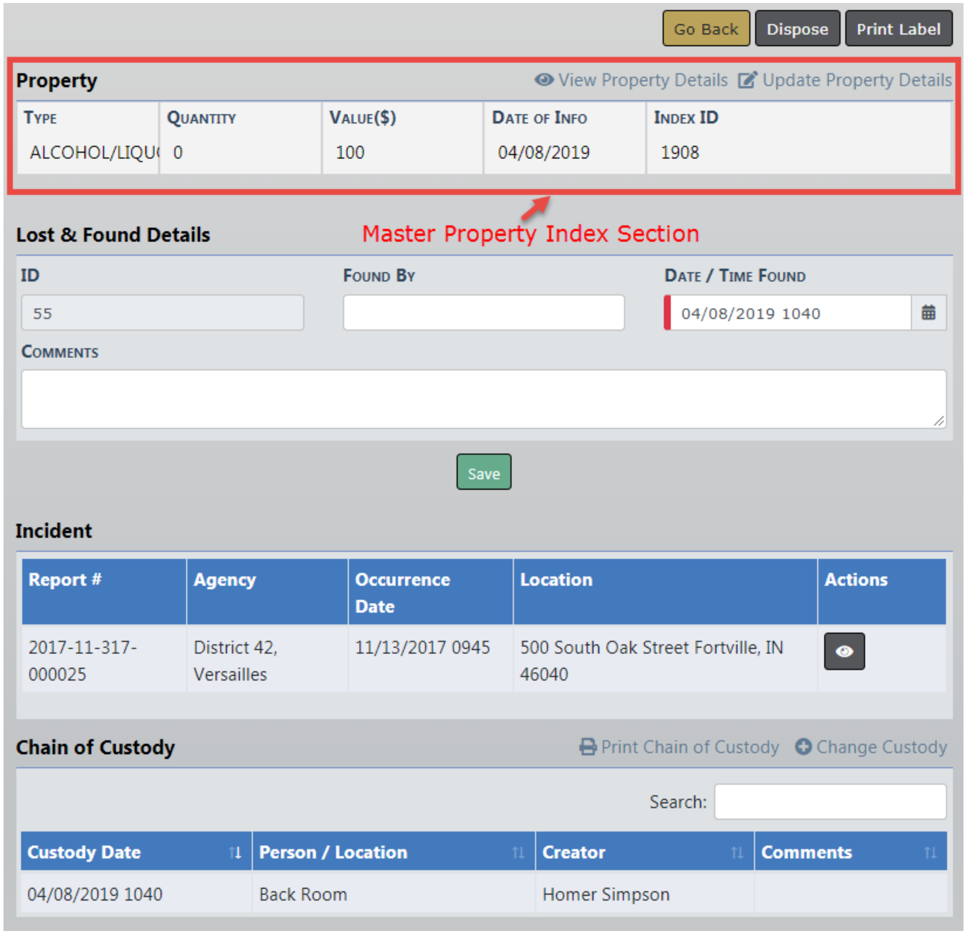
For more information on accessing the Standalone Module refer to "Standalone Module" on page 761.
For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 763.

From the *Search Results* window click on the **Edit** icon on the record you want to update.



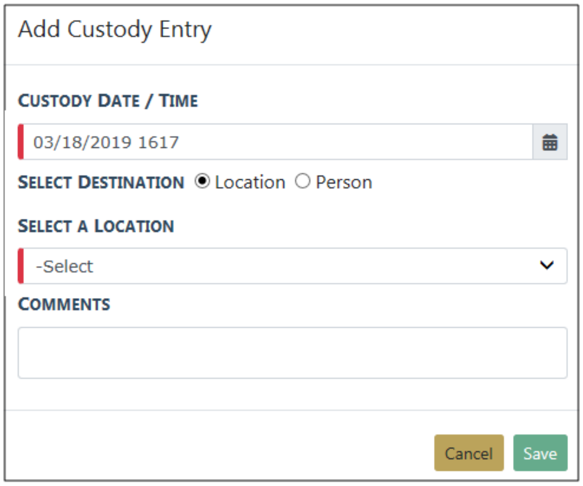
Note: Disposed records cannot be updated unless you have *Edit Disposition Information* permissions. For more information on permissions refer to your administrator.

The *Edit Property Lost & Found* screen appears. The *Master Property* information appears on the top section, *Lost & Found Property* information on the middle section, and *Chain of Custody* information on the bottom section.



With the proper permissions, you can click on the **View Property Details** or **Update Property Details** link to **View** or **Edit** the *Master Property Index* record respectively. For more information on permissions refer to your administrator.

Click on the **Change Custody** link to display the *Add Custody Entry* screen.



Select either **Location** or **Person**.

- If you selected **Location** then select a Location from the displayed list.
- If you selected **Person** then enter part of the officer's name in the text box and select the appropriate name that appears in a list.

Select **Save**.

You can also **Dispose** the selected record, or **Print Label**.

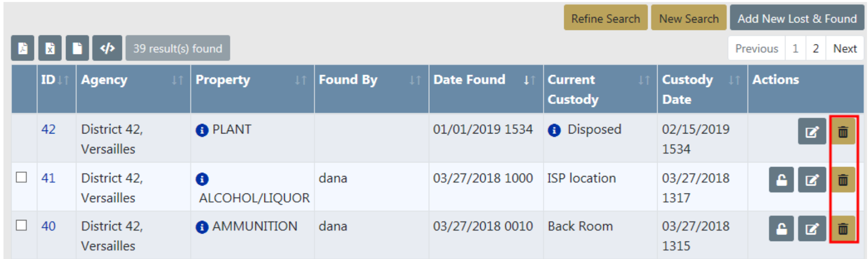
Note: For more information on how to **Dispose** a record refer to "Dispose Lost and Found Property" on the facing page.

Delete Lost and Found Property

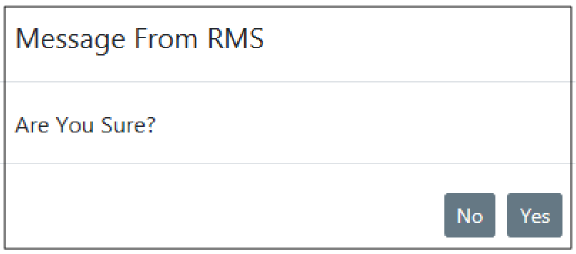
Access the **Lost & Found** Standalone Module then search for the record(s) you want to **Delete**.

For more information on accessing the Standalone Module refer to "Standalone Module" on page 761.
For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 763.

From the *Search Results* window click on the **Delete** icon in the *Actions* column on the record you want to delete.



A confirmation window appears.



Click **Yes** to delete or **No** to return to the *Search Results* window without deleting.

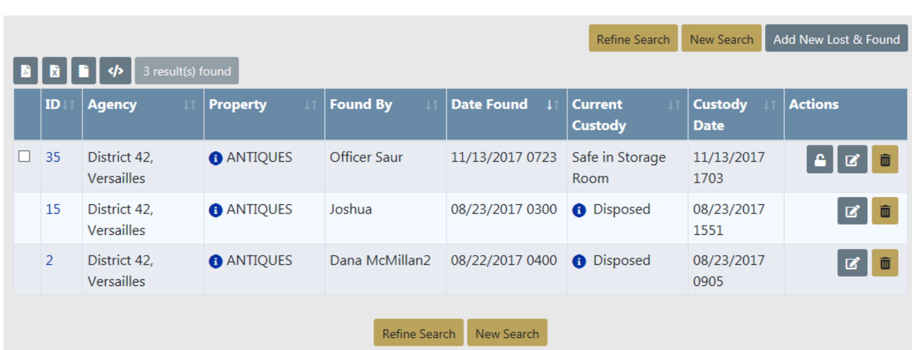
Dispose Lost and Found Property

Dispose is considered the end of life for the **Lost & Found** record(s).

Access the **Lost & Found** Standalone Module then search for the record(s) you want to **Dispose**.

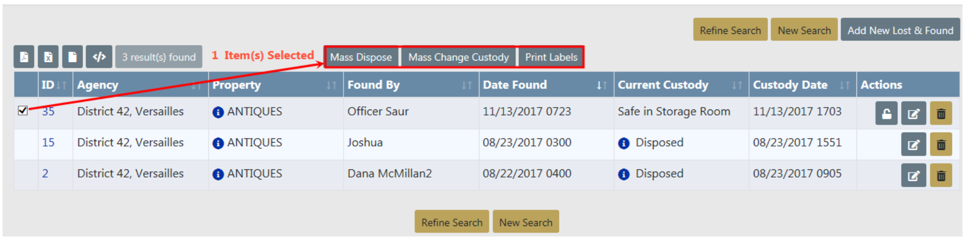
For more information on accessing the Standalone Module refer to "Standalone Module" on page 761.
For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 763.

From the *Search Results* window you can **Dispose** multiple records at once, or a specific record.



Dispose Multiple (Mass) Records

Select all records you want to **Dispose**, then click the **Mass Dispose** button.

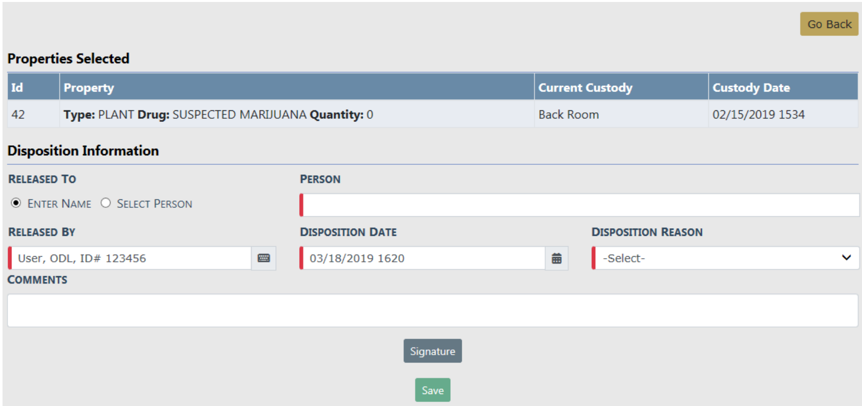


For more information on the mass functions refer to "Mass Lost and Found Functions" on page 774

Dispose a Specific Record

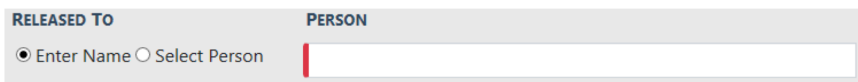
Locate the record you want to **Dispose** of then click the **Dispose** icon to display the *Lost & Found Disposition* screen.

Note: If the **Dispose** icon does not appear then you do not have proper permissions to perform that *Action*.

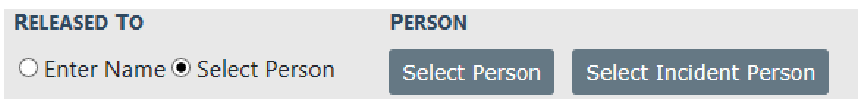


Enter the necessary data in the fields provided.

- Click **Enter Name** of the person to whom the property will be released and enter their name in the text box, OR click **Select Person** then click on **Select Person** to choose a name from the *Master Person Index*.



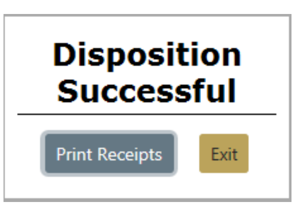
OR



For more information on the *Master Person Index* refer to MASTERINDICES.htm.

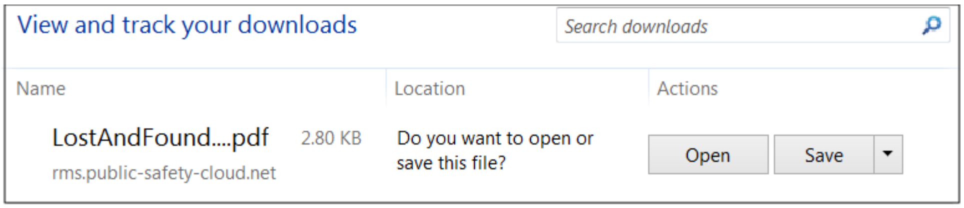
- **Released By** name defaults to the logged in user; however, it can be changed.
- **Disposition Date** and **Time** defaults to the current data and time; however, it can be changed.
- Select a **Disposition** from the list.
- Enter any **Comments**.
- If required by your agency, click on the **Signature** button for signature.

Click **Save** to display a successful confirmation message.

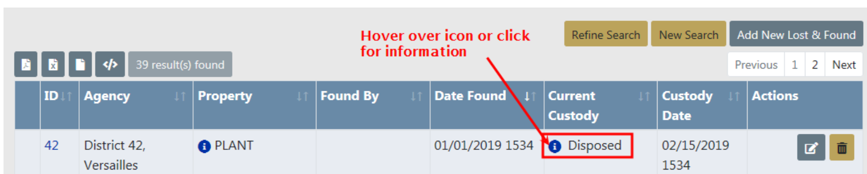


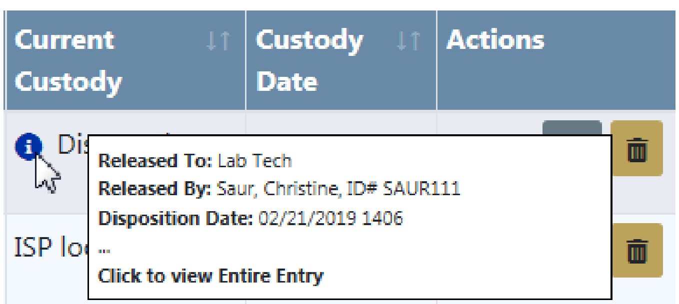
Click the **Print Receipts** button to print receipts, or click **Exit** to return to the *Search Results* screen without printing receipts.

If you chose to **Print Receipts** then you click **Open** to print, **Save** for more options, or **Cancel** to return to the *Search Results* screen.



Disposed appears on the property record in *Search Results*. Hover your mouse over or click on the blue circle to display detailed **Disposed** information.





Mass Lost and Found Functions

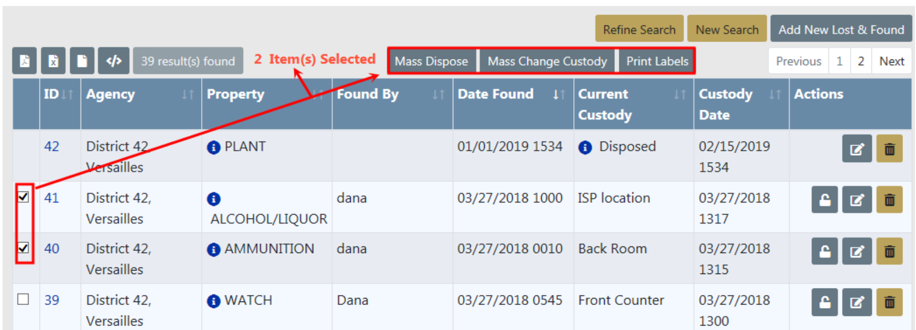
Mass Lost and Found Functions allow you to process **Lost & Found** records in bulk. There are three bulk (mass) functions available:

- Dispose
- Change Custody
- Print Labels

To process records in bulk, access the **Lost & Found** Standalone Module then search for the record(s) you want to process in bulk.

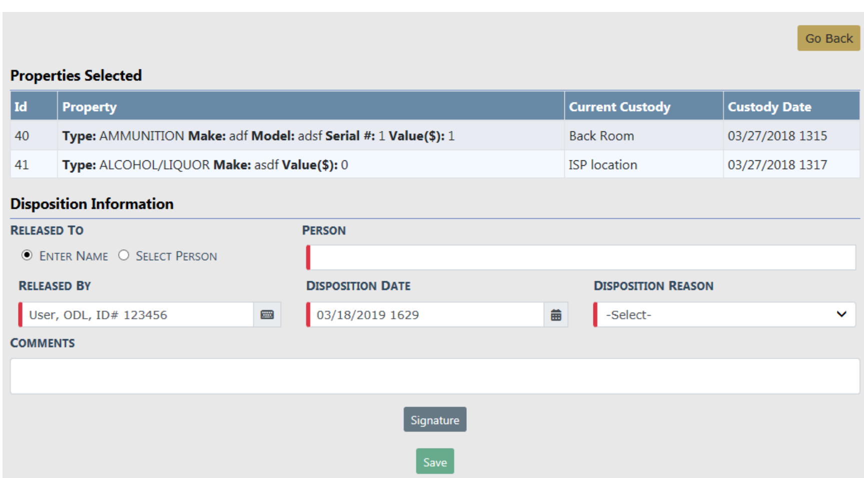
For more information on accessing the Standalone Module refer to "Standalone Module" on page 761.
For more information on searching **Lost & Found** records refer to "Search Lost and Found Property" on page 763.

From the *Search Results* window select one or more records you want to process, and with the proper permissions, **Mass Dispose**, **Mass Change Custody**, and **Print Labels** buttons appears.



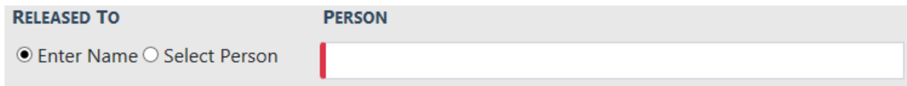
Mass Dispose

After selecting one or more records in the *Search Results* screen, click on the **Mass Dispose** button to display the *Lost & Found Disposition* screen.

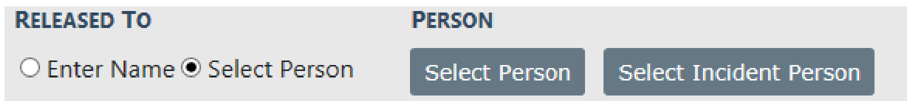


Enter the necessary data in the fields provided.

- Click **Enter Name** of the person to whom the property will be released and enter their name in the text box, OR click **Select Person** then click on **Select Person** to choose a name from the *Master Person Index*.



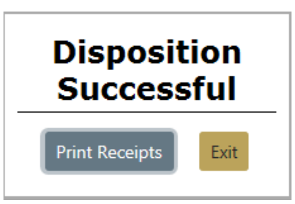
OR



For more information on the *Master Person Index* refer to MASTERINDICES.htm.

- **Released By** name defaults to the logged in user; however, it can be changed.
- **Disposition Date** and **Time** defaults to the current data and time; however, it can be changed.
- Select a **Disposition** from the list.
- Enter any **Comments**.
- If required by your agency, click on the **Signature** button for signature.

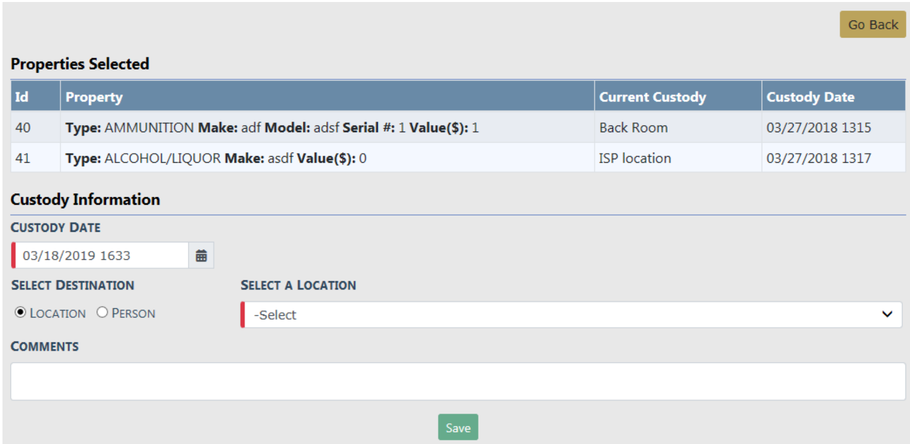
Click **Save** to display a successful confirmation message.



Note: **Disposed** records cannot be updated unless you have *Edit Disposition Information* permissions. For more information on permissions refer to your administrator.

Mass Change Custody

After selecting one or more records in the *Search Results* screen, click on the **Mass Change Custody** button to display the *Mass Change Custody* screen.



Enter the necessary data in the fields provided.

- Click **Location** and select the location from the list, OR click **Person** then enter part of the officer's name and choose the appropriate name from the list that appears.
- The **Customer Date** and **Time** defaults to the current date and time. You can change it if necessary.
- Enter any **Comments**.

Click **Save**.

Note: Online RMS creates a new *Chain of Custody* with the entered information for each selected **Lost & Found** property record.

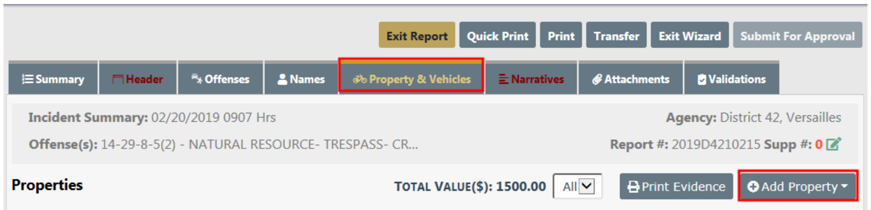
Print Labels

After selecting one or more records in the *Search Results* screen that need a label, click the **Print Labels** button.

Incident Report Lost and Found

Lost & Found property can be created from the *Property & Vehicles* tab on the *Incident Report* and marked as **Lost & Found**. You can choose to single or mass properties.

Note: The **Lost & Found** module must be turned on for your agency to utilize this module and functionality.



For more information on Lost & Found from the *Property & Vehicles* tab on the *Incident Report* refer to "Property & Vehicles Tab" on page 226.

Chapter 35. Expungements

Expungements Overview

When an agency is required to expunge a record, the specifics on what needs to be expunged are contained in the court order.

Note: Please refer to your agency's policy on Expunging Records.

This document provides suggestions for accommodating the expungement order by deleting or modifying records contained in Online RMS.

Note: Beginning with **Online RMS 11.14.0**, the workflows for expungements have been enhanced significantly. These include the ability to expunge field arrests, charges, citations, warrants, and offender roles within incidents.

If the order specifies an offender on an incident report:

With appropriate permissions, you can expunge the offender from the report using the Offender incident expungement workflow. For workflow details, refer to "Expunge Offender or Arrestee" on page 783.

If the order specifies an arrest:

With appropriate permissions, you can expunge an arrest record by using the Arrest Expungement process. For details, refer to "Expunge Field Arrest" on page 791.

If the order specifies to delete an Incident Report, Arrest, and all related information:

It is easy to locate the Incident, and Arrest reports then delete them from Online RMS. When creating the delete comment, it may be beneficial to cite the court order.

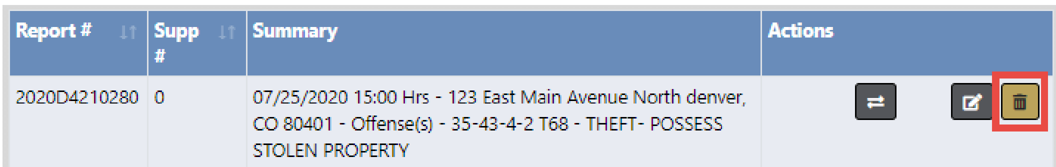
Incidents

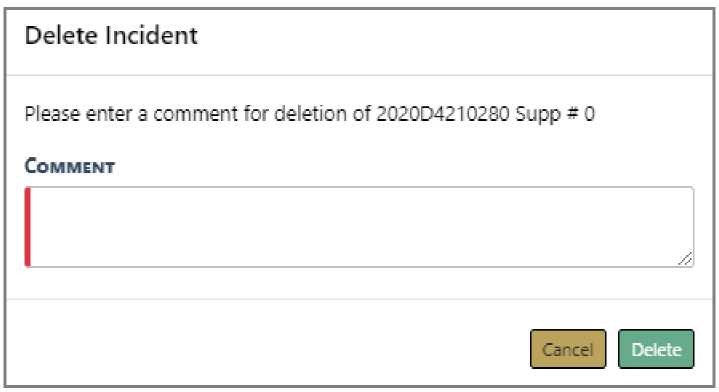
Incident reports must be in Initial status to allow for deletion:

- If the report is in *Approved* status, refer to "Changing Incident Status" on page 276 for detailed instructions on changing the status to *Initial*.

For detailed instructions on deleting an Incident report, refer to "Delete Initial Incident Report" on page 283.

Below illustrates how to delete an initial report from Recent Activities, and the required comment dialog box:





Note: Deleted reports are not recoverable from the database.

Field Arrests/Citations/Field Contacts

If ordered, users with authority can delete Field Arrests, Citations, and FIeld Contacts using similar steps as with Incidents by first querying for the record.

To delete Field Arrests, refer to "Delete Field Arrest" on page 400.

To delete Citations, refer to "Delete Citation" on page 578.

To delete Field Contacts, refer to "Delete a Field Contact" on page 419.

Investigative Case

If there is a follow-up Investigative Case associated with the Incident report, the delete process automatically removes the Incident from the associated Investigative Case.

- The associated Investigative Case should also be reviewed to delete any case comments that may reference the expunged person by name.

<u>**Person Record**</u>

It is not necessary to delete a person record from Online RMS. Once an Incident report is deleted, the association to that report is deleted from the Master Indices Person record.

If preferred, an agency can choose to edit the Master Person record specified in the expungement order to change the person's name rather than delete the individual events.

As an example, some agencies change the person's name to the reference number of the expungement order to preserve the event records and remove any ability to find records when searching for the person's name. If this flow is preferred, keep in mind the individual records will need to be reviewed to remove the person from associated narratives or comment fields.

Orders to expunge records need to be handled on a case-by-case basis.

After reviewing your agency's current policy at the time of the order, and the decision is made on what records need to be deleted or edited, you can proceed to delete or edit those records within Online RMS. If you need further assistance, please submit a ticket to our Support Team.

External Repositories

Caliber Online RMS contributes information from approved reports to external repositories such as NDEX. It may be necessary for agencies to expunge information contributed to these repositories by contracting them directly and following their expungement process.

Interfaces

Your agency may contribute information to Caliber Online RMS through an interface with an external program. After the necessary information is expunged from Online RMS, you may need to contact the external vendor directly and follow their process to expunge the records in their program.

Examples of external interfaces are electronic ticket writers, crash reporting systems, and DWI/DUI reporting software.

Un-Expunge

With proper permissions you can **Un-Expunge** an offender or arrestee on an Incident Report, or an entire Field Arrest. For more information, refer to "Un-Expunge" on page 795.

Note: Expunged records are not visible throughout Online RMS unless the user is granted permissions to view expunged details.

Accessing the View Person Page

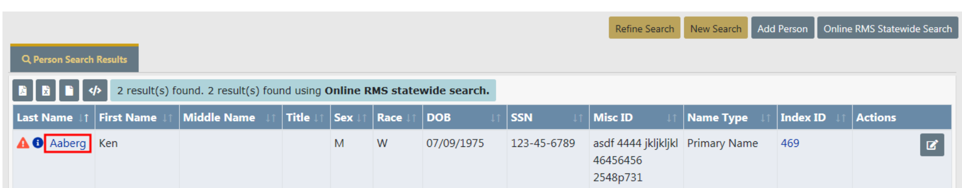
As with many areas of Online RMS, you can access the *View Person* page different ways:

- From the Master Person Record.

  Search for the Master Person record by clicking on the **Master Indices** menu on the *Top Navigation Bar*, then click **Person** from the drop-down list to open the *Master Index Search* page.

  Enter the person's last name, first name, or other information to yield the desired results, then click the **Search** button to open the *Person Search Results* page.

  Click on the appropriate person's **last name** to open the *View Person* page, then click on the *Person Summary* tab.

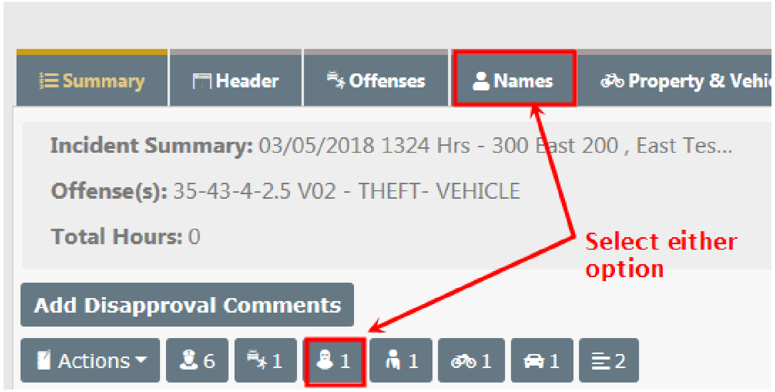


  Note: For more information on Master Indices refer to "Master Indices" on page 83.

- From the Incident Report.

  - Search for and view the Incident Report. For more information on searching and viewing Incident Reports, refer to "View Incident Reports" on page 265.

  - While on the Incident Report click on the **Names** tab or the **Offenders** link.



- Locate the Offenders grid then click on the person's **Name** to open the *View Person* page.

Note: For more information on viewing Incident Reports refer to "View Incident Reports" on page 265.

Expunge Offender or Arrestee

You can expunge an offender or arrestee from a Incident Report, providing the Incident Report is *approved* and you have *Expunge Records* permissions. Refer to your agency administrator for more information on *Expunge Records* permissions.

Incident **Expungements** apply to the offender only as there may be more than one offender.

The Person Summary tab on the *View Person* page displays an **Expunge** column in the Involved Incidents grid. A red Expunge icon appears in the **Expunge** column on records that qualify for expungement.

Note: For details on how to access the *View Person* page refer to "Accessing the View Person Page" on the previous page.

Note: Beginning with **Online RMS 11.14.0**, the workflows for expungements have been enhanced significantly. These include the ability to expunge field arrests, charges, citations, warrants, and offender roles within incidents.

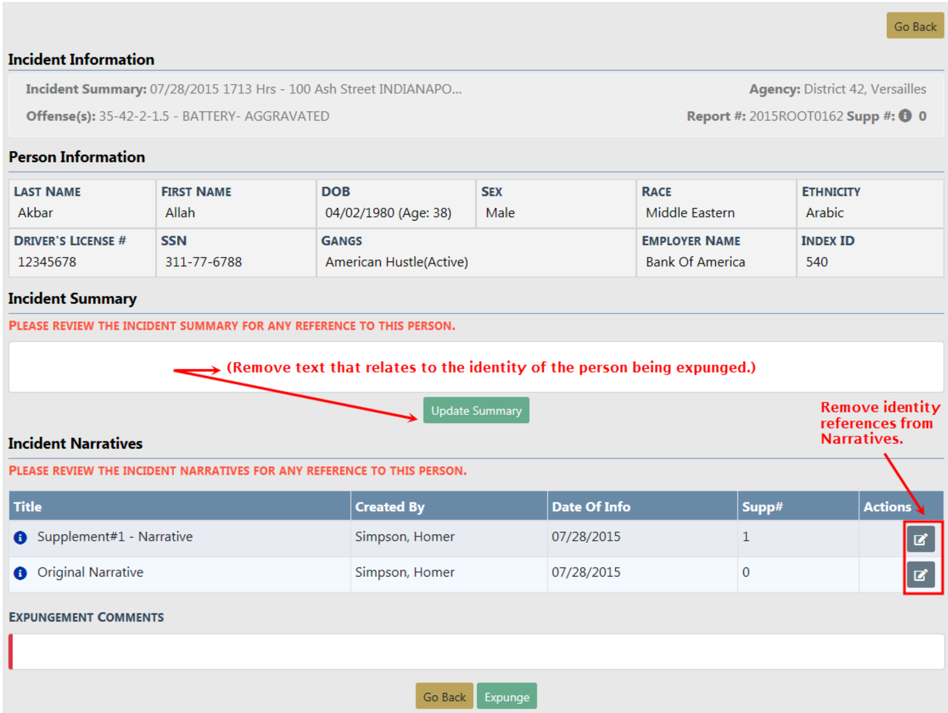
Locate the Incident Report on the Summary tab of the *View Person* page from which you want to **Expunge** the offender, then click on the red Expunge icon in the **Expunge** column to open the *Expunge Person* page.

Involved Incidents

	Expunge	Report#
☐		2018D4210186
☐		2017-0120
☐		2017-0091
☐		2016-BCSO-000177
☐		2016D4210025
☐		2015ROOT0220
☐		2015ROOT0162
		2015ROOT0156
		2015ROOT0154
☐		0011315

On the *Expunge Offender* page, review the Summary and remove all text that relates to the identity of the person being expunged, then click the **Update Summary** button. Also review **Narratives** tied to this Incident Report and remove all references to that person.

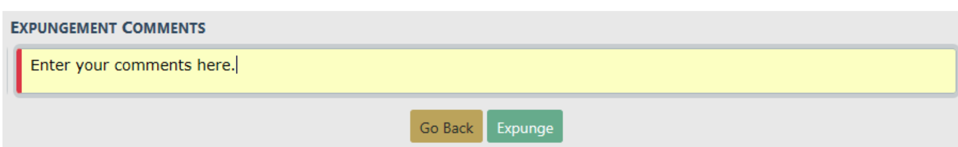
Note: Online RMS saves the original and the edited versions of the Narrative.



Click the **Back** button if you choose to cancel the expungement.

> **Note:** If you cancel the expungement after updating the **Incident Summary** text, you need to update **Incident Summary** back to its original version manually.

To continue with the expungement, enter **Expungement Comments** at the bottom of the page then click the **Expunge** button.



The *View Person* page refreshes automatically, returning you to the *Person Details* tab. Click on the *Person Summary* tab to see **[Expunged]** in the **Expunge** column of the Incident.

Hover your mouse over the blue information bubble  to display expungement comments.

Users without the *Expungement - View Expunged Records* permission do not see the Incident Involvement, and the Involvement counts do not include the Incident from which the person was expunged. For more information refer to "Expungement Results" below.

Expunged records are not visible in Online RMS without the *Expungement - View Expunged Records* permission. Refer to your system administrator for more information on permissions.

Expungement Results

Online RMS protects the identity and related data of expunged offenders or arrestees by applying restrictions based on a combination of user permissions and an Expunged flag placed on the data.

Offender or Arrestee Name Restrictions

The offender or arrestee's name is replaced with the word **EXPUNGED** for users *without* the *Expungement - View Expunged Records* permission.

The offender or arrestee's name displays with an **[EXPUNGED]** tag for users *with* the *Expungement - View Expunged* permission.

- Incident Summary Tab - Offenders Grid.
- Incident Names Tab - Offenders Grid (no view icon).
- Incident Names Tab - View Victim page - Victim/Offender relationship.
- Incident Property/Vehicle Tab - View Property page - Property Owner.
- Incident Property/Vehicle Tab - View Vehicle page - Vehicle Owner.
- Visualization - Incident Quick View - Offender Grid.
- Incident Mapping - Incident Quick View - Offender Grid.
- Case Management - Involved Names Grid.
- Evidence/Property Labels - Property Owner.
- Evidence/Property Lab Report - Suspect/Offender box.

Other Expunged Data Restrictions

The following changes are applicable throughout Online RMS for users *without* the *Expungement - View Expunged* permission.

- Master Indices - Person Common Event Associations (offender is not displayed at all).

- Visualization - Offender or Arrestee to Incident link.
- Visualization - Person Quick View - Person Summary tab (Incident not displayed for offender).
- Photo Lineup - Person Quick View - Person Summary (Incident not displayed for offender).
- Person Collapse - Person Quick View - Person Summary tab (Incident not displayed for offender).
- Incident Narratives - If updated during the expunge process, only the edited expunged version can be viewed.
- Incident Search - Name / Combo additional search criteria (Incident not returned when searching by offender).
- Incident Smart Search - by name (Incident not returned at all).
- Incident Smart Search - by any other part of incident (offender not displayed / image not displayed).
- Case Search - Name additional search criteria (Incident not returned when searching by offender).

Online RMS displays the above data with an **[EXPUNGED]** tag on the record for users *with* the *Expungement - View Expunged* permission. Users with this permission can also view both the original Incident Narratives and the edited expunged versions.

Note: Regardless of the user's permissions, the Print Incident page does not display the expunged offender or arrestee's name, and Quick Print will not print the expunged offender or arrestee.

Expungements - RMS 11.14 and Higher

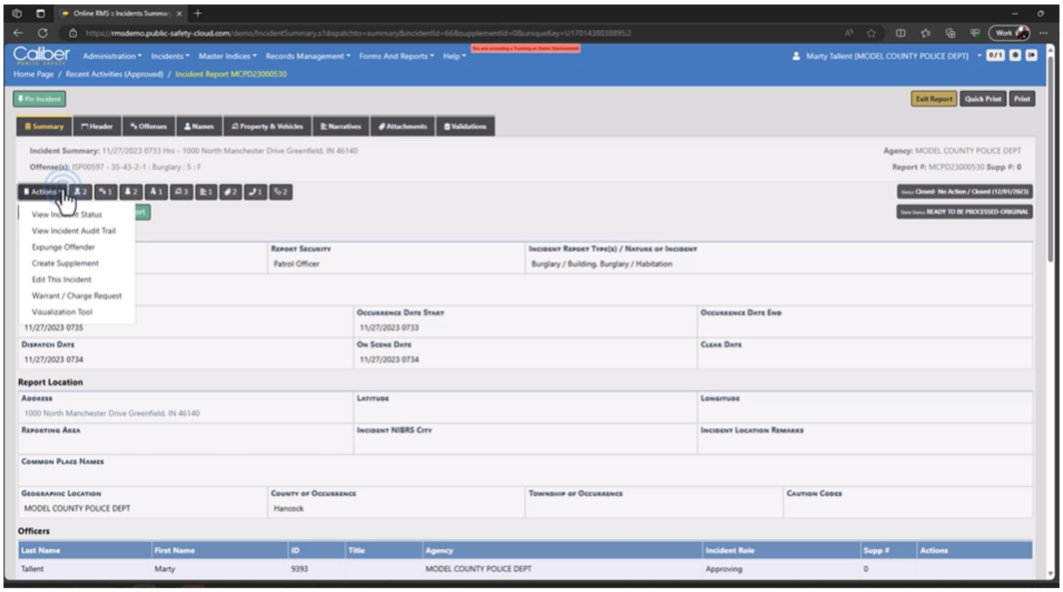
The improved workflows for expungements and unexpungements starting with RMS 11.14 allow users with the appropriate permissions to expunge and unexpunge individuals associated with incidents citations, field arrests, and warrants.

Note: Contact Caliber Public Safety Support for assistance in enabling permissions.

Expunging a person from a record can be done from an approved incident report (it cannot be done from an unapproved incident report) or from a person's master name index summary tab.

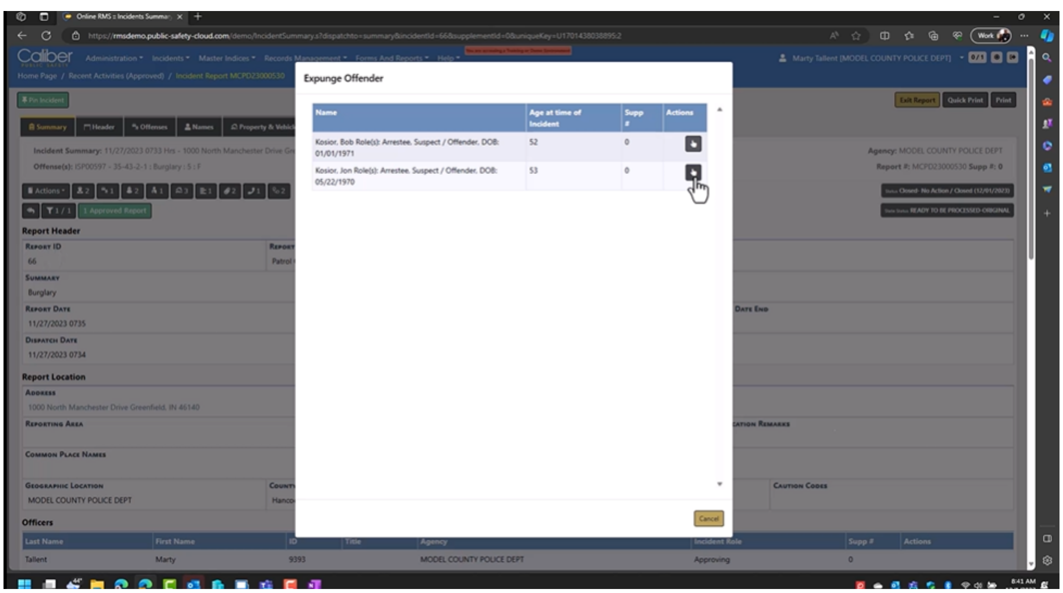
To expunge a person from an approved incident report, navigate to and view the incident.

From the summary tab, click on the **actions dropdown**.



Select **Expunge Offender**.

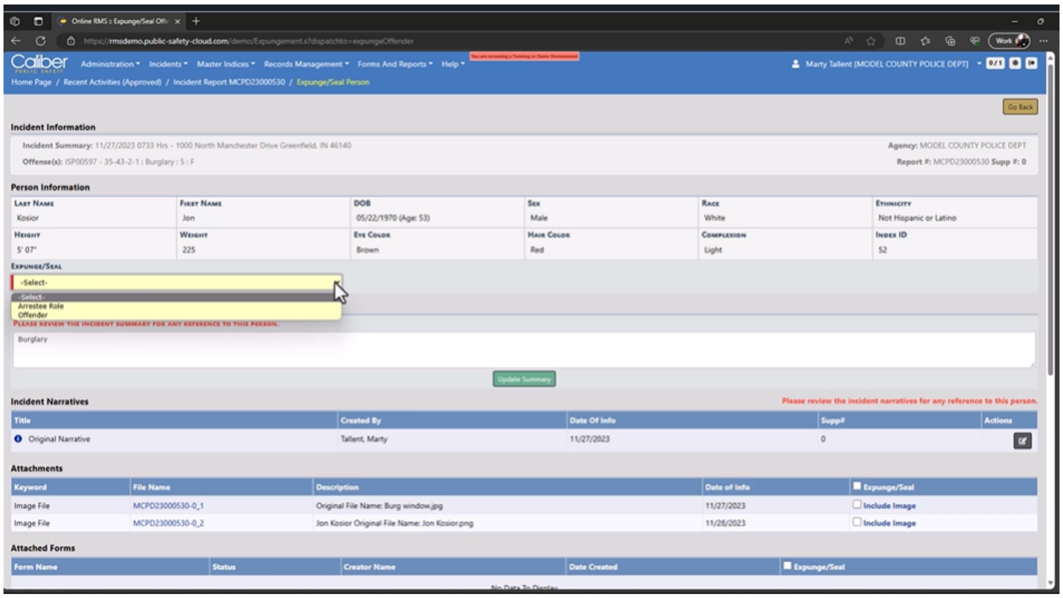
A new window will be displayed listing all offenders associated with this incident.



Click on the select icon for the offender to be expunged, which opens the expunge/seal window.

From the expunge/seal section, choose either the **Arrestee** or the **Offender** role.

Note: Choosing Offender will expunge a person from both the Offender and Arrestee roles. Choosing Arrestee will only remove the person from the Arrestee role.



Review the incident summary and incident narrative for any references to the person to be expunged, and edit the narratives (by clicking the **Edit** icon) if any changes must be made to remove references to the expunged person.

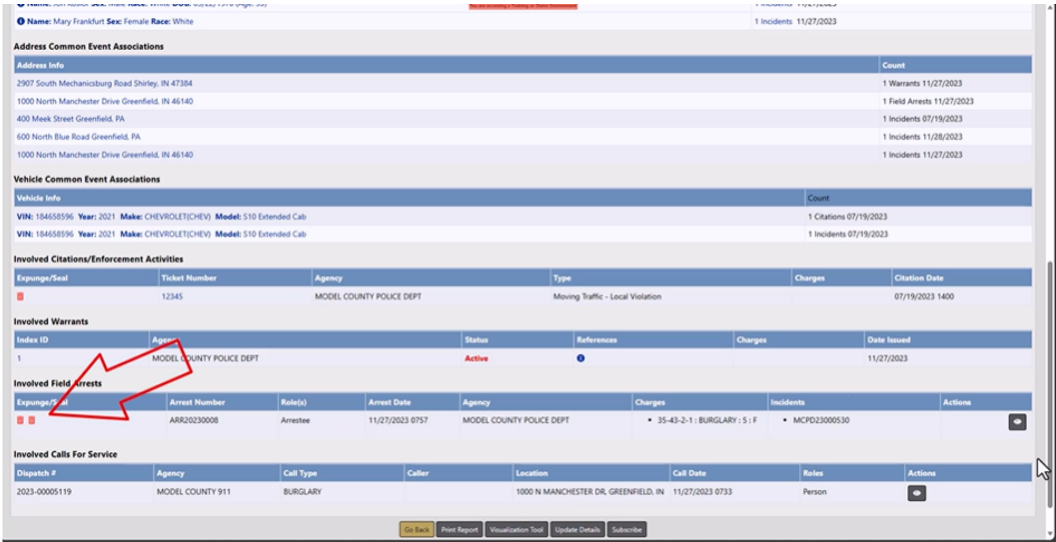
Click **Save** to return to the **Expunge/Seal** window.

Expunge any attachments by checking the individual record or selecting the checkbox to select all records.

Note: Comments, when flagged in red, are required to explain why the expungement was conducted.

Click the **Expunge/Seal** button to save the expungement. The incident will now display as expunged/sealed and the names will be replaced with this indication for users who do not have permissions to view expunged/sealed records.

When expunging a person from that person's **Summary** tab, navigate to the person summary (such as by searching Master Indices) and locate the expunge/unexpunge icons.



These icons will not be displayed for users who lack permissions to do so. Click the appropriate icon and enter any required comments when performing expungements/unexpungements.

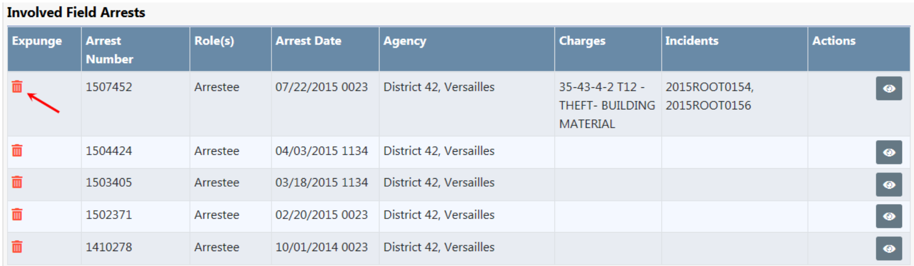
Note: Warrants can only be expunged from the incident or field arrest with which they are associated.

Expunge Field Arrest

If you have the *Expunge Records* permission, locate the Involved Field Arrest on the Person Summary tab of the *View Person* page that you want to **Expunge**, then click on the red Expunge icon in the **Expunge** column to open the *Expunge Arrest* page.

Note: For details on how to access the *View Person* page refer to "Accessing the View Person Page" on page 782.

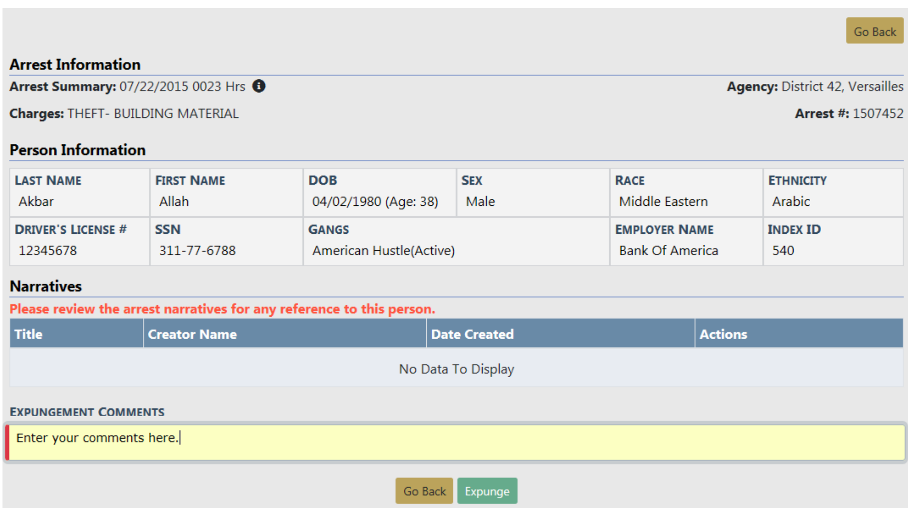
Note: Beginning with **Online RMS 11.14.0**, the workflows for expungements have been enhanced significantly. These include the ability to expunge field arrests, charges, citations, warrants, and offender roles within incidents.


Involved Field Arrests

Expunge	Arrest Number	Role(s)	Arrest Date	Agency	Charges	Incidents	Actions
	1507452	Arrestee	07/22/2015 0023	District 42, Versailles	35-43-4-2 T12 - THEFT- BUILDING MATERIAL	2015ROOT0154, 2015ROOT0156	
	1504424	Arrestee	04/03/2015 1134	District 42, Versailles			
	1503405	Arrestee	03/18/2015 1134	District 42, Versailles			
	1502371	Arrestee	02/20/2015 0023	District 42, Versailles			
	1410278	Arrestee	10/01/2014 0023	District 42, Versailles			

Review any **Narratives** tied to this Field Arrest and remove all references to that person.

> **Note:** Online RMS saves the original and the edited versions of the Narrative.


Go Back

Arrest Information

Arrest Summary: 07/22/2015 0023 Hrs **Agency:** District 42, Versailles

Charges: THEFT- BUILDING MATERIAL **Arrest #:** 1507452

Person Information

LAST NAME	FIRST NAME	DOB	SEX	RACE	ETHNICITY
Akbar	Allah	04/02/1980 (Age: 38)	Male	Middle Eastern	Arabic

DRIVER'S LICENSE #	SSN	GANGS	EMPLOYER NAME	INDEX ID
12345678	311-77-6788	American Hustle(Active)	Bank Of America	540

Narratives

Please review the arrest narratives for any reference to this person.

Title	Creator Name	Date Created	Actions
No Data To Display			

EXPUNGEMENT COMMENTS

Enter your comments here.

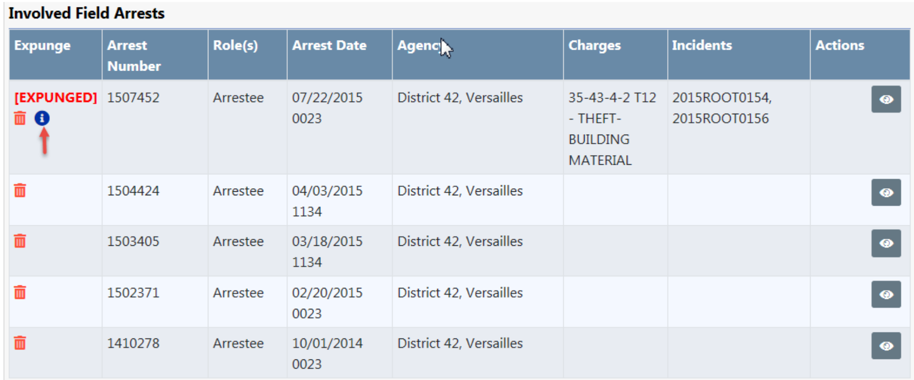
Go Back Expunge

Click the **Back** button if you choose to cancel the expungement.

To continue with the expungement, enter **Expungement Comments** then click the **Expunge** button.

The *View Person* page refreshes automatically, returning you to the *Person Details* tab. Click on the *Person Summary* tab to see the **[Expunged]** tag in the **Expunge** column of the Involved Field Arrest.

Hover your mouse over the blue information bubble to display expungement comments.



Involved Field Arrests

Expunge	Arrest Number	Role(s)	Arrest Date	Agency	Charges	Incidents	Actions
[EXPUNGED]	1507452	Arrestee	07/22/2015 0023	District 42, Versailles	35-43-4-2 T12 - THEFT-BUILDING MATERIAL	2015ROOT0154, 2015ROOT0156	
	1504424	Arrestee	04/03/2015 1134	District 42, Versailles			
	1503405	Arrestee	03/18/2015 1134	District 42, Versailles			
	1502371	Arrestee	02/20/2015 0023	District 42, Versailles			
	1410278	Arrestee	10/01/2014 0023	District 42, Versailles			

Users *without* the *Expungement - View Expunged Records* permission do not see the Arrest Involvement or the Involvement counts for the expunged Field Arrest. Refer to your agency administrator for more information on permissions.

Users *with* the *Expungement - View Expunged Records* permission the Involvement counts remain unchanged, the Field Arrest displays with an **[Expunged]** tag, common events to people, organizations, addresses, vehicles and property display, and an Un-Expunged icon appears to reverse the expungement.

Note: For more information on reversing an expungement refer to "Un-Expunge" on page 795.

Expungement Results

Online RMS protects the identity and related data of expunged records by applying restrictions based on a combination of user permissions and an Expunged flag placed on the data.

For users *without* the *Expungement - View Expunged Records* permission, the Field Arrest will *not* display as follows:

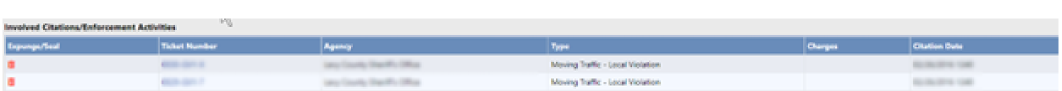
- Field Arrest Search Results (search by number, Arrestee, Names).
- Incident Summary Tab - Arrest Grid (if associated).
- Warrants - Arrest Grid (if associated).
- Incident Names Tab - View Victim Page- Victim/Offender relationship.
- Master Indices - Common Event Associations/Involvement Counts.
- Incident Mapping - Incident Quick View.
- Visualization - Incident Quick View.

Online RMS displays the above data with an **[EXPUNGED]** tag on the record for users *with* the *Expungement - View Expunged* permission. Users with this permission can also view both the original Incident Narratives and the edited expunged versions.

Expunge/Seal Field Arrests and Charges

Note: Beginning with **Online RMS 11.14.0**, the workflows for expungements have been enhanced significantly. These include the ability to expunge field arrests, charges, citations, warrants, and offender roles within incidents. (If a warrant is to be expunged, it must be attached to the incident or the field arrest in question. **Expungements cannot be done on incidents that are not approved.**)

Expunge/Seal is controlled by user permissions. A user with sufficient permissions can expunge/seal records and view expunged/sealed records.



Note: **Expunge Offender** is available from the Incident Actions drop-down menu.

Un-Expunge

Only users with the *Expungement - View Expunged Records* permissions can **Un-Expunge** an offender or arrestee on an Incident, or **Un-Expunge** a Field Arrest.

Click the red Expunge icon in the *Expunge* column for the Incident or Field Arrest on the Person Summary tab of the View Person page.

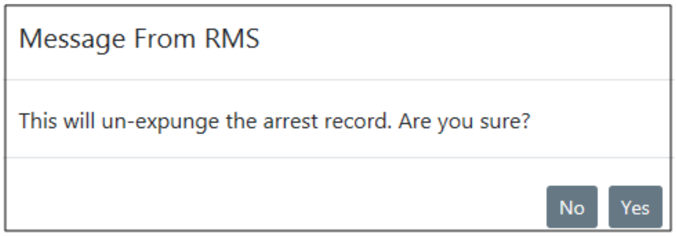
> **Note:** For details on how to access the *View Person* page refer to "Accessing the View Person Page" on page 782.

> **Note:** Beginning with **Online RMS 11.14.0**, the workflows for expungements have been enhanced significantly. These include the ability to expunge field arrests, charges, citations, warrants, and offender roles within incidents.

Involved Field Arrests

Expunge	Arrest Number
[EXPUNGED]	1507452
	1504424
	1503405
	1502371
	1410278

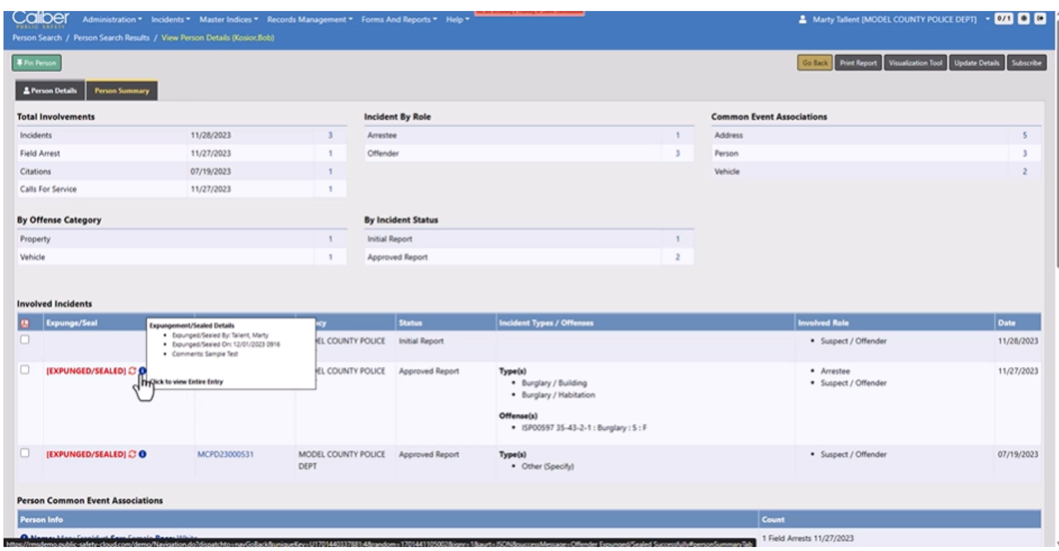
A confirmation message appears asking if you are sure. Click **Yes** to continue or click **No** to close the message without expunging.



If you chose to expunge, the Field Arrest becomes viewable to all users of the system, and the system discards both the edited expunge Narrative and Incident Summary.

Unexpungements - RMS 11.14 and Higher

To unexpunge a person from a record, click on the person's summary tab, find the record, hover over the information icon to view expungement details, and click the **circular arrows icon** to unexpunge. Click the **unexpunge/seal** button once the needed change is complete.



Chapter 36. Training Videos

Training Videos Overview

Beginning with Online RMS 11.4.0, agencies can enhance users' training and learning experience with the **Online Training** feature. The **Online Training** feature offers standard Caliber video-based learning to all users and optionally, agency-specific videos. In addition, the agency administrator can enable a feature that pops up videos on a particular page, requiring users to watch the videos.

Benefits of Video-Based Learning

- A cost-effective training approach.
- Provides up-to-date training opportunities.
- Provides a **Training Video Library** where users can keep track of their videos.

  Note: For more information on the **Training Video Library**, refer to “Training Videos Library” on page 798.

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

Video Rules and Requirements

- Agency must have the **Online Training** feature turned on and configured to get the pop up (required) videos. Contact Caliber Public Safety to turn on and configure this feature.
- Agency must enable this feature on the agency profile for users to have access to non-standard videos.

- No roles or permissions are associated with this feature; the **Online Training** feature controls access.
- Supports only MP4 files at this time.
- Contact Caliber Public Safety to upload videos.
- The agency administrator has the option to require user acknowledgment after viewing the video.
- The **date and time** watched by users are saved to the database on videos that **require acknowledgment**.

Acknowledgment Required vs. Optional

The agency administrator has the option to **require your acknowledgment** after viewing videos. By acknowledging a video, you are stating that you have watched the video in its entirety. The video pops-up automatically each time you log into Online RMS and access a page to which the video is associated until you acknowledge having watched it.

Unlike videos that require acknowledgment, **optional** videos do not pop-up automatically when you log into Online RMS.

All videos are stored in your **Training Videos Library**. You can watch videos whenever you wish by navigating to your **Training Videos Library**.

For more information on **watching** and **acknowledging** videos, refer to “Watch Training Videos” on page 803.

For more information on **Training Videos Library**, refer to “Training Videos Library” on page 798.

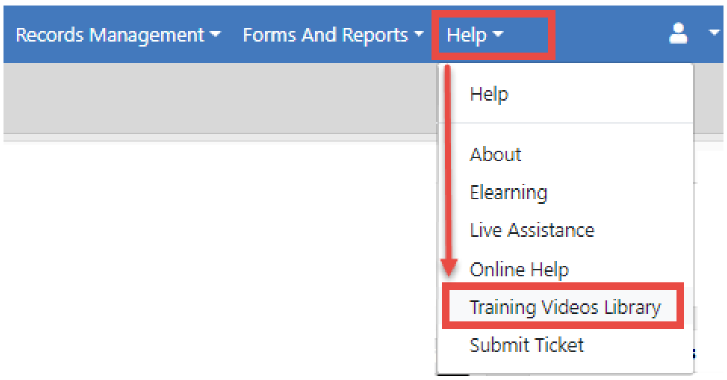
Training Videos Library

Training videos reside in your personal Online RMS **Training Videos Library**, where you can keep track of the videos you have and haven't watched, and you can watch these videos as often and as many times as you wish.

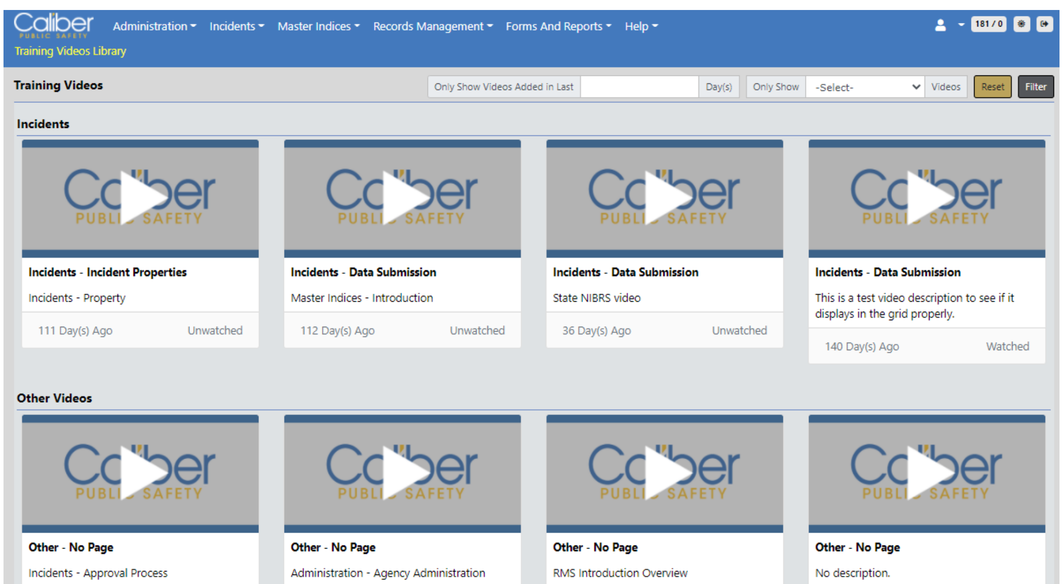
Access the Training Videos Library

Follow these steps to access your **Training Videos Library** in Online RMS:

1. Click **Help** on the top navigation menu, then click **Training Videos Library**.



2. The **Training Videos Library** Opens.



Understanding the Training Videos Library

Videos can be divided into groups

Group examples:

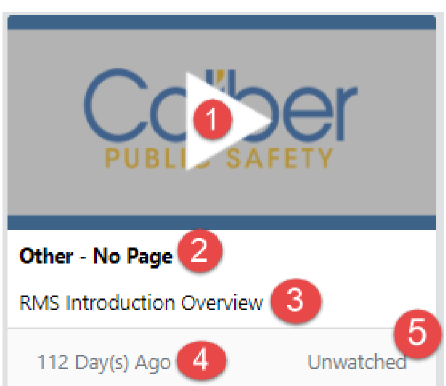
- Incidents
  - This group contains incident-based reporting videos.
- Other Videos
  - This group contains videos that do not fall into the other groups.

Grouping happens when the pop-up option is turned on and the agency administrator configures specific videos to pop-up on a specific page.

For example, if the agency administrator turns the feature on and they configure the Incident Category video to pop-up on the Incidents page, the Incident Category page displays under the Incidents category.

This the pop-up feature is not turned on, all videos appear under the Other Videos category.

Video Elements



1. Click to **Play**.
2. The **Group** to which the video belongs (i.e., Incidents or Other Videos).
3. **Description** of the video.

4. The **number of days** the video has been in your Training Video Library.

5. **Status** of the video (i.e., Watched or Unwatched).

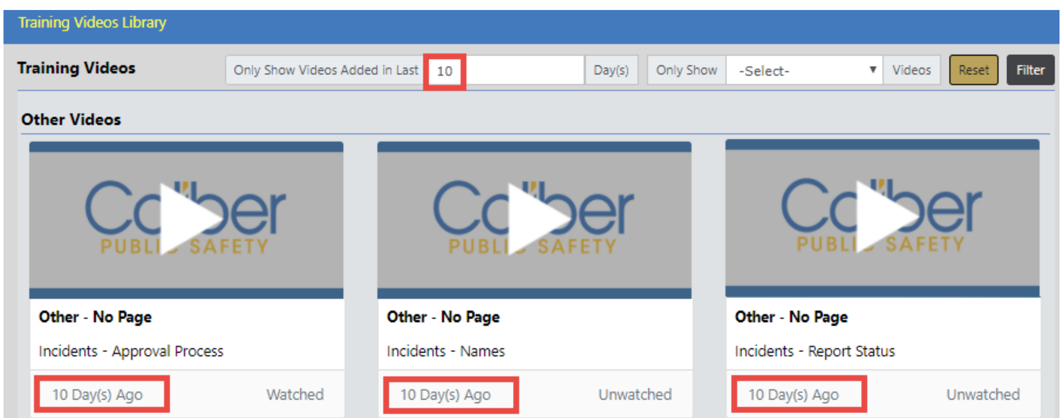
Filter Video List

Across the top of the **Training Video Library**, you have the option to filter the video list by only showing videos that have been added within a *specified number of days*, and only show *watched* or *unwatched* videos.

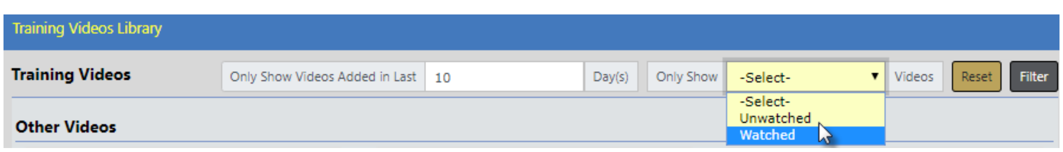
Show Videos Added in Last Number of Day(s)

1. Enter the **number of days** in the field provided.

2. Click **Filter** to display only the videos that were posted to your **Training Video Library** within the days specified.

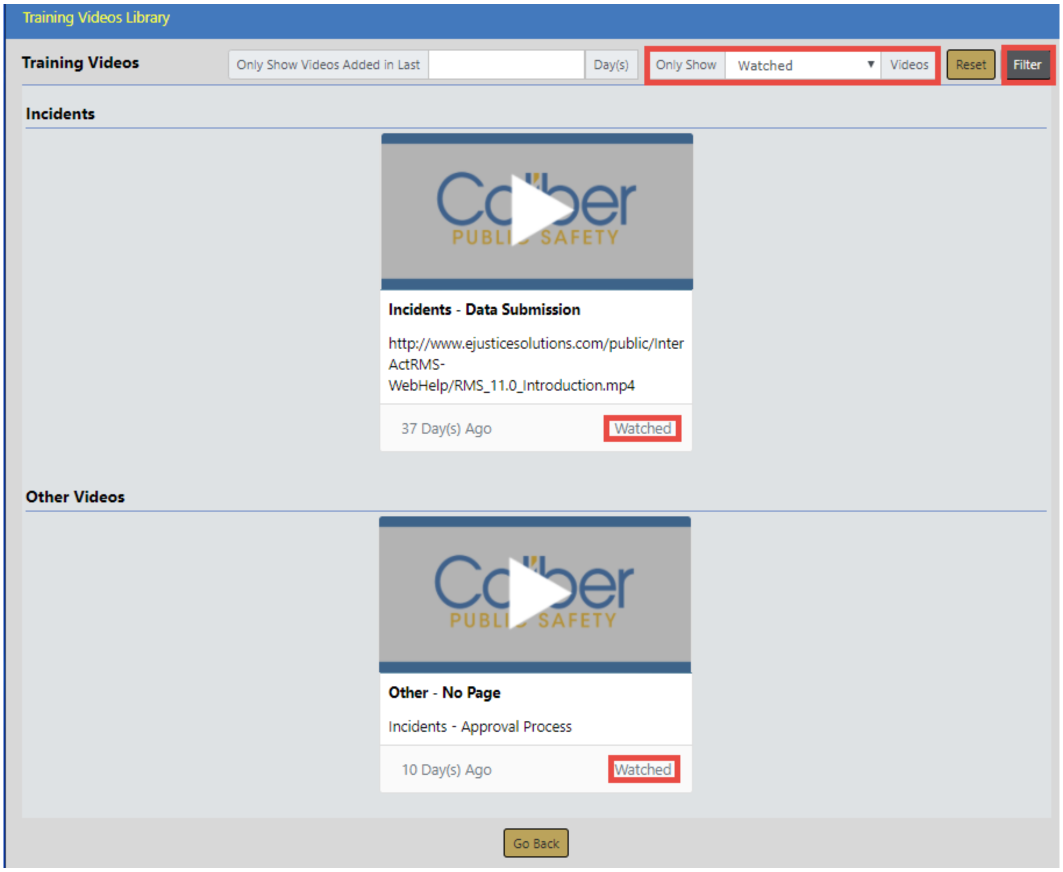


Show Watched or Unwatched Videos



1. Click into the **Only Show** field and select **Watched** or **Unwatched** from the list. **Watched** is used in the example.

2. Click **Filter** to display only the videos that match your criteria.

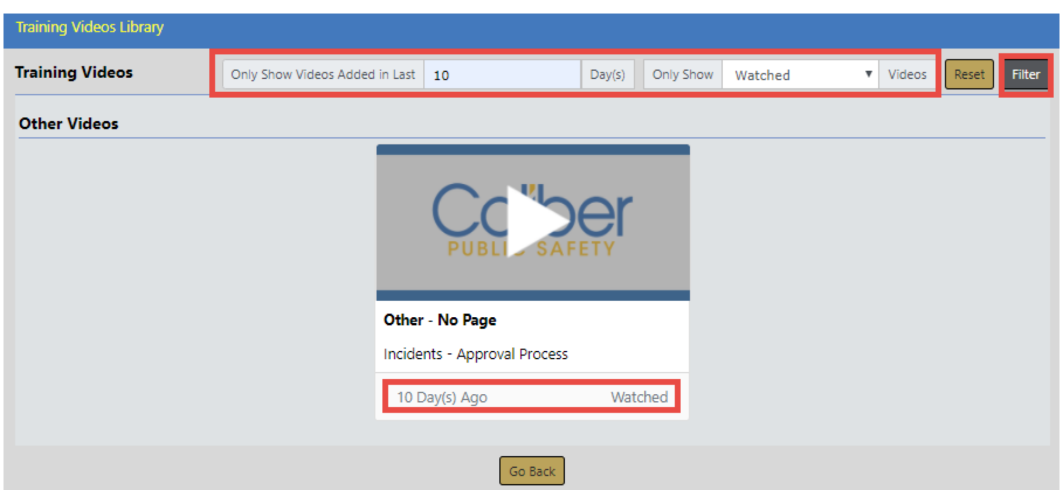


Show Videos with Combined Criteria

1. Enter the **number of days** in the field provided.

2. Click into the **Only Show** field and select **Watched** or **Unwatched** from the list. **Watched** is used in the example.

3. Click **Filter** to display only the videos that match your combined criteria.

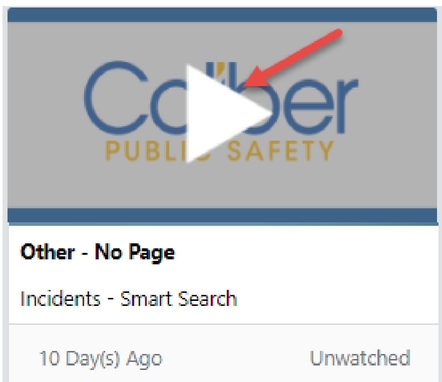


Watch Training Videos

Follow these steps to watch training videos in Online RMS:

1. Identify the training video you wish to watch. There are two ways to do this:
   a. When a video *requires your acknowledgment*, the video pops up automatically each time you log into Online RMS and access a page to which the video is associated until you acknowledge having watched it.
   b. Or, you can go to your **Training Videos Library** for a list of videos available to you. For details on accessing videos in your **Training Videos Library**, refer to "Training Videos Library" on page 798.

2. Click the **Play** button to launch the video with additional options.



1. The **Group** to which the video resides in your Training Video Library.

2. Hover mouse over, or click on the **information bubble** to view the description of the video.

3. Click on **Open in New Window** to open the video in a new window, separate from Online RMS.

4. Click to **Play** the video.

5. The length of time left and total video time, respectively.

6. Click to manage the **audio**.

7. Click to watch the video in **Full Screen** mode.

8. Click to **Download** the video or view it **Picture in Picture**.

9. Click **acknowledge** after watching the video in its entirety.

Note: This option only appears when an acknowledgment is required. For more information, refer to your agency administrator.

Note: The video pops up automatically every time you log into Online RMS, until you acknowledge having watched it.

10. Click to **Close** the window.

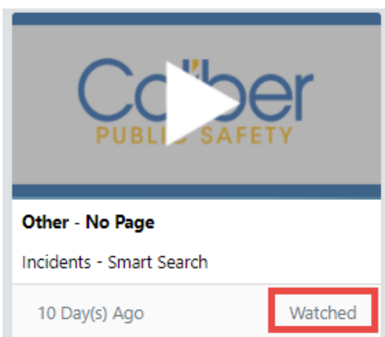
    Note: This option grays out if an acknowledgment is required, and the acknowledgment checkbox has not been checked.

11. Click **Watch Later** if you wish to close and return to the video later.

    Note: This option appears only if an acknowledgment is required, and it grays out when the acknowledgment box is checked.

    Note: If you do not acknowledge having watched the video, the video pops up automatically each time you log into Online RMS and access a page to which the video is associated.

3. After the video plays and the window is closed, the video status changes from **Unwatched** to **Watched**.



Chapter 37. Training Module

Overview

The Online RMS **Training** module provides users with proper permissions the ability to create **Training Courses** and **Certifications** with date ranges and required prerequisites, then easily track employee involvement to ensure they each obtain and maintain the necessary training and certification based on their job duties.

This module is available with full subscription access to Online RMS. It is disabled by default but can be enabled, and additional user training is available for purchase. Contact Caliber Public Safety Support for more information.

The **Training** module can be configured specific to your agency's needs, such as an eligible list of course types (i.e. gun safety, mobile training, etc.) and classification levels. Refer to the Online RMS Administrator Guide for details on configuring these items.

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

- *Courses*

  Training classes with specific focus to refine skills (i.e., Online RMS training).

  Attendees can be assigned to Courses two different ways:

  a. From the Course Instance record.
  b. From the Employee record.

- *Certifications*

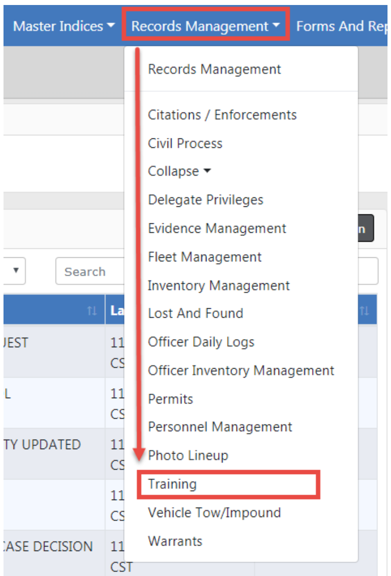
  Proof of achieving specific skills or knowledge level that are mandatory for specific job duties (i.e., gun safety certification).

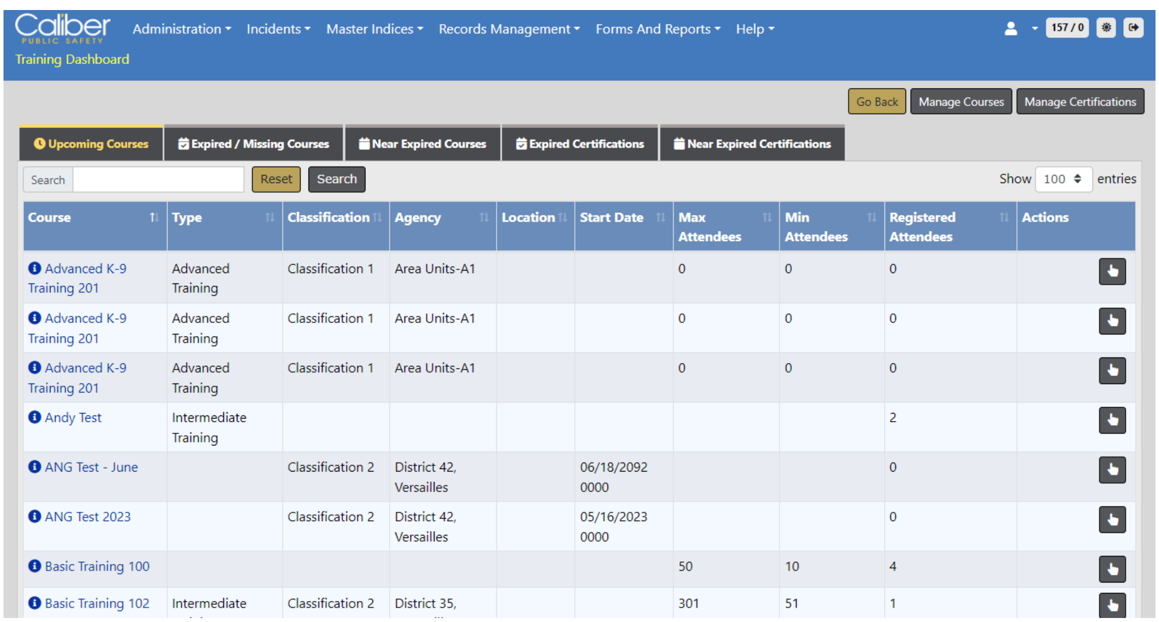
  Attendees can be assigned to Certifications one way:

  a. From the Employee record.

Training Module Dashboard

Click the **Records Management** menu on the *Top Navigation Bar*, then click on the **Training** option to access a consolidated pathway for viewing and managing training data from a single screen.





Note: The **Training Dashboard** contents are based on permissions and can vary by user. For more information on permissions, refer to your system administrator.

The **Training Dashboard** consists of several features:

1. There are five tabs that contain various course and certification information. Each tab contains links that allow you to view or edit information, depending on your permissions set by the agency administrator. Available links vary by tab as outlined below.

   Upcoming Courses

   - A current list of active courses.
   - View or edit upcoming courses.

   Expired / Missing Courses

   - A list of employees not registered for a required course for their employee type, or a list of employees who are attendees of a course that has expired.
   - View or edit employee records.

   Near Expired Courses

   - A list of employees who are attendees of a course nearing expiration.
   - View or edit employee records.

   Expired Certifications

   - A list of expired certifications by employee.
   - View or edit employee records.

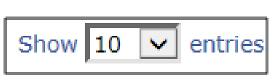
   Near Expired Certifications

   - A list of certifications about to expire by employee.
   - View or edit employee records.

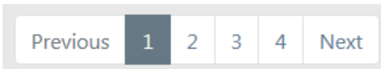
2. Three buttons on the top right of the window:

   - Click the **Manage Courses** button to add or update courses. For more information refer to "Manage Courses" on page 813.
   - Click the **Manage Certifications** button to add or update certifications.
   - Click the **Go Back** button to exit the dashboard.

3. You can change the number of entries that appear in the grid. Click on the **Show Entries**  and select 10, 25, 50 or 100. The default is 10.

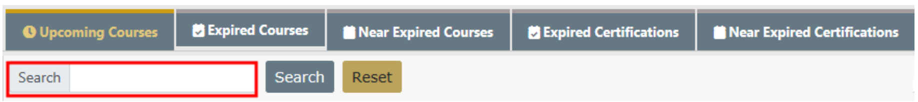


4. The bottom of the window displays the number of entries and it allows you to navigate between pages.



This example shows 10 entries per page. The highlighted number on the right is the page currently being viewed. Click **Next** to advance to the next page, or click the page number you want to view. Click on **Previous** to view the previous page.

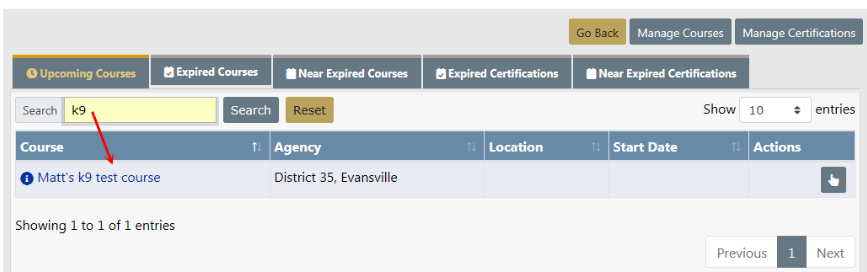
5. Each tab allows you to **Search** or filter data that appears in the grid.



a. Click on the tab you want to view, if different than the default **Upcoming Courses**.

b. Enter text into the **Search** text box, then click the **Search** button or press **Enter** to display only records matching the entered text. The displayed list dynamically changes based on the entered text.

For example, on the **Upcoming Courses** tab enter *k9* in the text box, then click **Search** or press **Enter** to show only records containing *k9*.

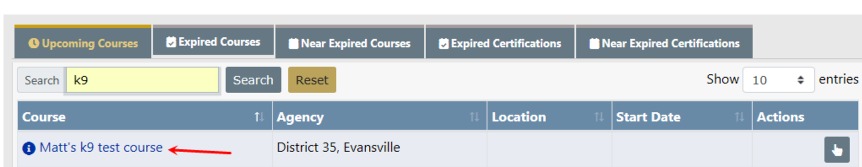


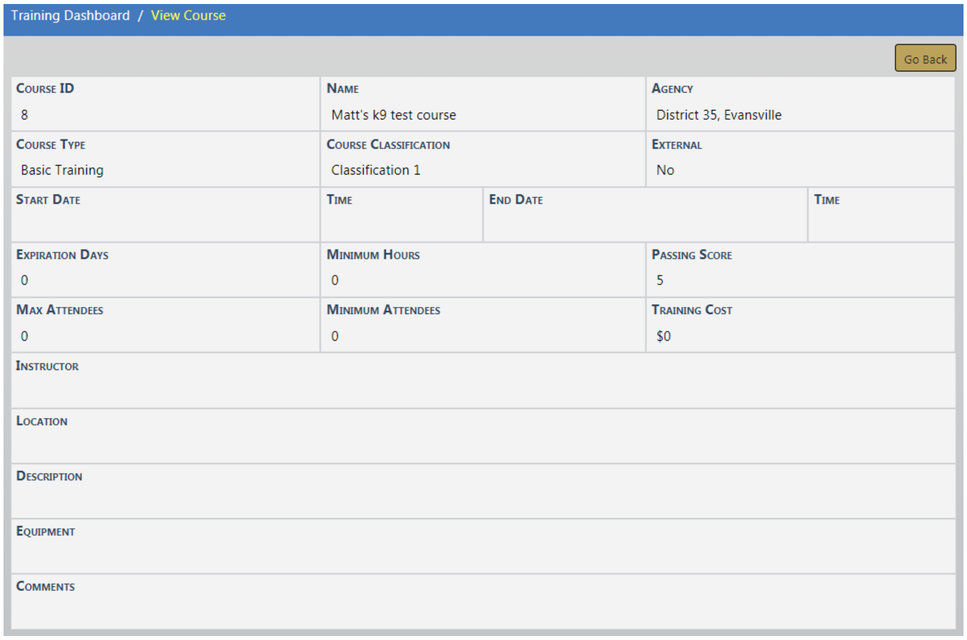
Note: Click the **Reset** button to remove the entered search text and list all available records.

6. Example of accessing information within a tab. The same general process applies to all tabs.

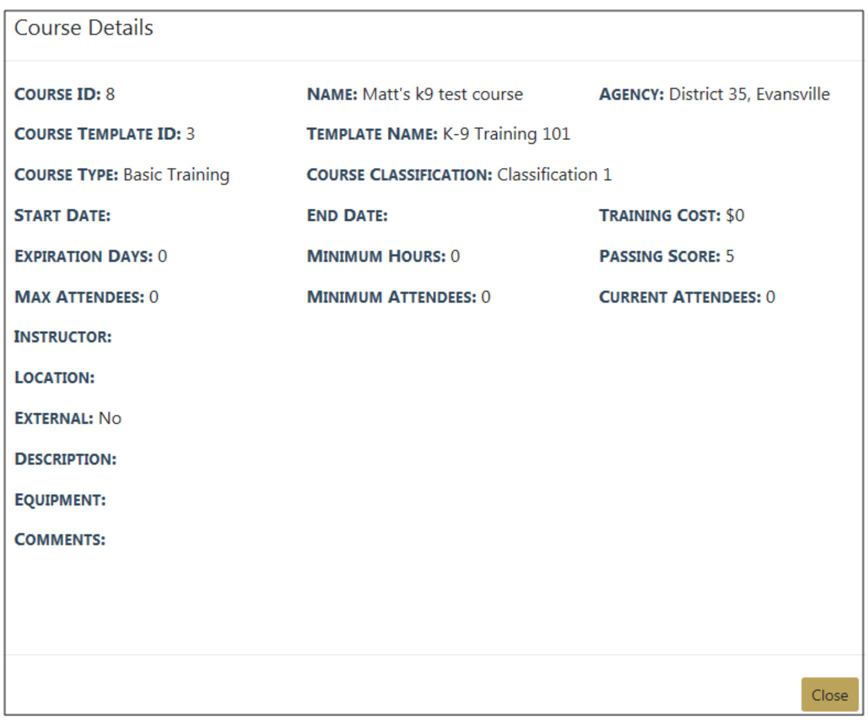
View Details Two Ways

a. Click on a **Course** to view details about that particular course. This is view only, details cannot be changed here.





b. Click on the information bubble to view the details without having to open the record itself.



Click on the **Close** button to close the window and return to the **Training** dashboard.

Edit the Details

a. Or click on the **Select** icon under the *Actions* column to edit the details of a particular course.

b. Click on the **Back** button to return to the **Dashboard**. For your convenience, this button is located on the upper right of the window and on the lower center of the window; either will return you to the **Dashboard**.

Exit Training Module

a. Click the **Go Back** button to return to the Records Management main menu.

Courses

There are two components to **Courses**:

- Template
- Course Instance

Template

A **Template** is a standard form that is used as a starting point when creating **Course Instances**. For example, users with proper permissions can create a **Template** that is pre-populated with a standard class description that will pull into the newly created **Course Instance** automatically.

Note: For more information on permissions and managing **Training Templates** refer to the *Online RMS Admin Guide.*.

Course Instance

A **Course Instance** is a specific course to which employees can be assigned. There could be multiple records of the same course, but with different dates or other information. When creating a **Course Instance**, with proper permissions, you can either choose an existing **Template** from a list or create a new **Template** and **Course Instance** at the same time without moving between menus to do both.

Note: The phrase **Course Instance** is often referred to as **Course** throughout this guide.

Manage Courses

The **Manage Courses** button on the **Training** dashboard allows you to, with proper permissions, *Search, Add*, and *Edit* **Course Instance** data.

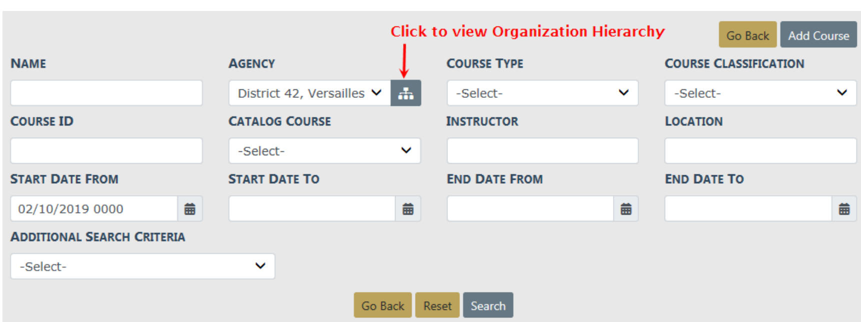
To update course data you must first search for the course. The search results will provide the option to update or view the course data.

Note: Once a Course Instance is created, you cannot delete it. Enter the appropriate **End Date** if created in error or if you need to end a particular Course Instance for whatever reason.

Search Courses

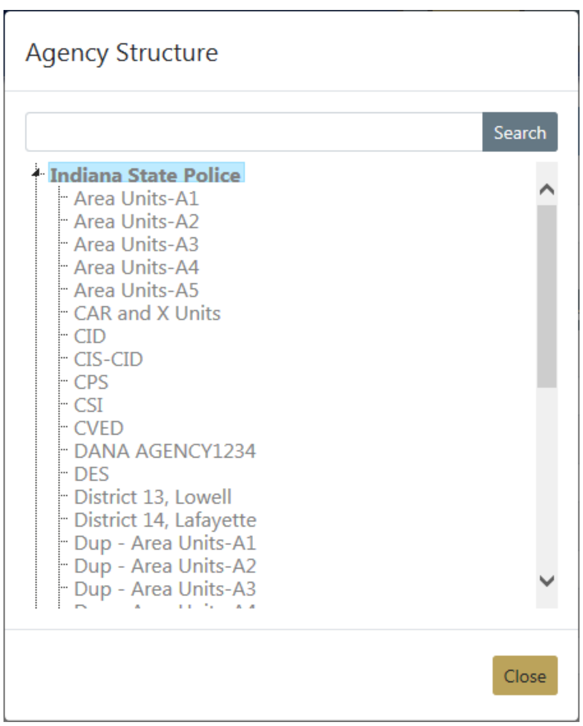
1. Click on the **Manage Courses** button on the **Training Dashboard**. For details on accessing the dashboard refer to "Training Module Dashboard" on page 808.
2. The **Course Search** screen appears.
3. With proper permissions you can select an **Agency** within the organization by using two methods.

   a. Click in the Agency field then select from the list that appears.



   b. Click on the hierarchy icon next to the **Agency** field to display the organization hierarchy.

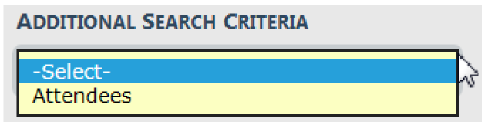
Hover over the agency to display a list of the agency's units.

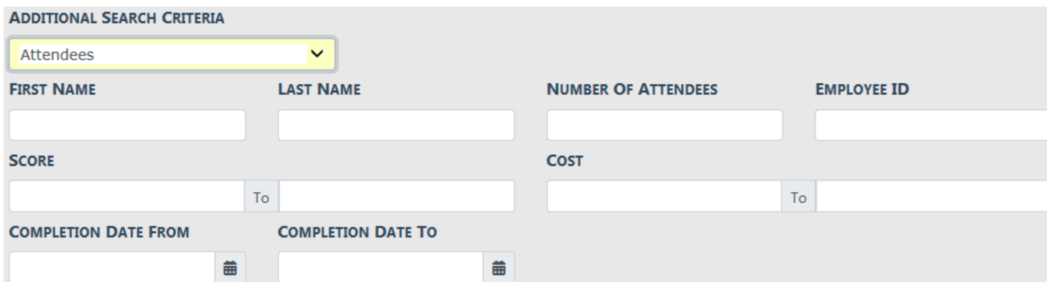


Click on the agency you want to include in the search and the agency name appears in the **Agency** field.

4. The fields with **-Select-** supply a specific list from which to choose. For example, to search for a specific **Course Type** click in the field and a list will appear, then click on an item from the list.

5. Optionally reduce your search results to include only **Additional Search Criteria** by using the drop-down list at the bottom left of the screen., then enter the appropriate information in the additional fields that appear on the screen.





6. Either click **Reset** to clear all fields to start over, click **Go Back** to return to the Training dashboard, click **Search** to display a list of existing courses that match the entered data, or **Add Course** to add a course to the database without first searching. For details on how to add a course refer to "Add Course " on the next page.

   If you selected **Search** the results display in a grid.

10 result(s) found

Course	Type	Classification	Location	# Attendees	Pass / Fail	Start Date	End Date	Agency	Actions
ANG Test - December		Classification 2		1	0 / 0 !	12/03/2022 00:00		District 42, Versailles	
ANG Test - June		Classification 2		1	1 / 0	06/18/2092 00:00		District 42, Versailles	
ANG Test - Nov		Classification 2		1	0 / 0 !	11/02/2022 00:00		District 42, Versailles	
ANG Test - Oct		Classification 2		1	0 / 0 !	10/02/2022 23:00		District 42, Versailles	
ANG Test - Sept		Classification 2		1	0 / 0 !	09/27/2022 00:00		District 42, Versailles	
Advanced K-9 Training 201	Advanced Training	Classification 1		0	0 / 0	08/15/2022 00:00		Area Units-A1	
Agency Startup				0	0 / 0	08/01/2022 00:00		District 21, Toll Road - SC	
Agency Startup				1	0 / 0 !	10/01/2022 00:00		District 21, Toll Road - SC	
Basic Training 100				0	0 / 0	08/01/2022 00:00			
Internal Training	Basic Training	Classification 1		1	0 / 0 !	08/06/2022 00:00		District 42, Versailles	

Refine Search New Search

- The Pass/Fail column represents the total number of attendees that passed and the total that failed, respectively.
- If the total number of attendees equals Total Pass + Total Fail, the numbers display in black, otherwise the numbers display in red with an exclamation point.

Click **Refine Search** to modify your current search criteria, or **New Search** to start the search over. Click on the course name to view course details, or click the Edit icon  in the *Actions* column to edit the course. For details on editing the course refer to "Edit Course " on page 818.

7. To export search results to a file refer to "Export Search Results" on page 36.

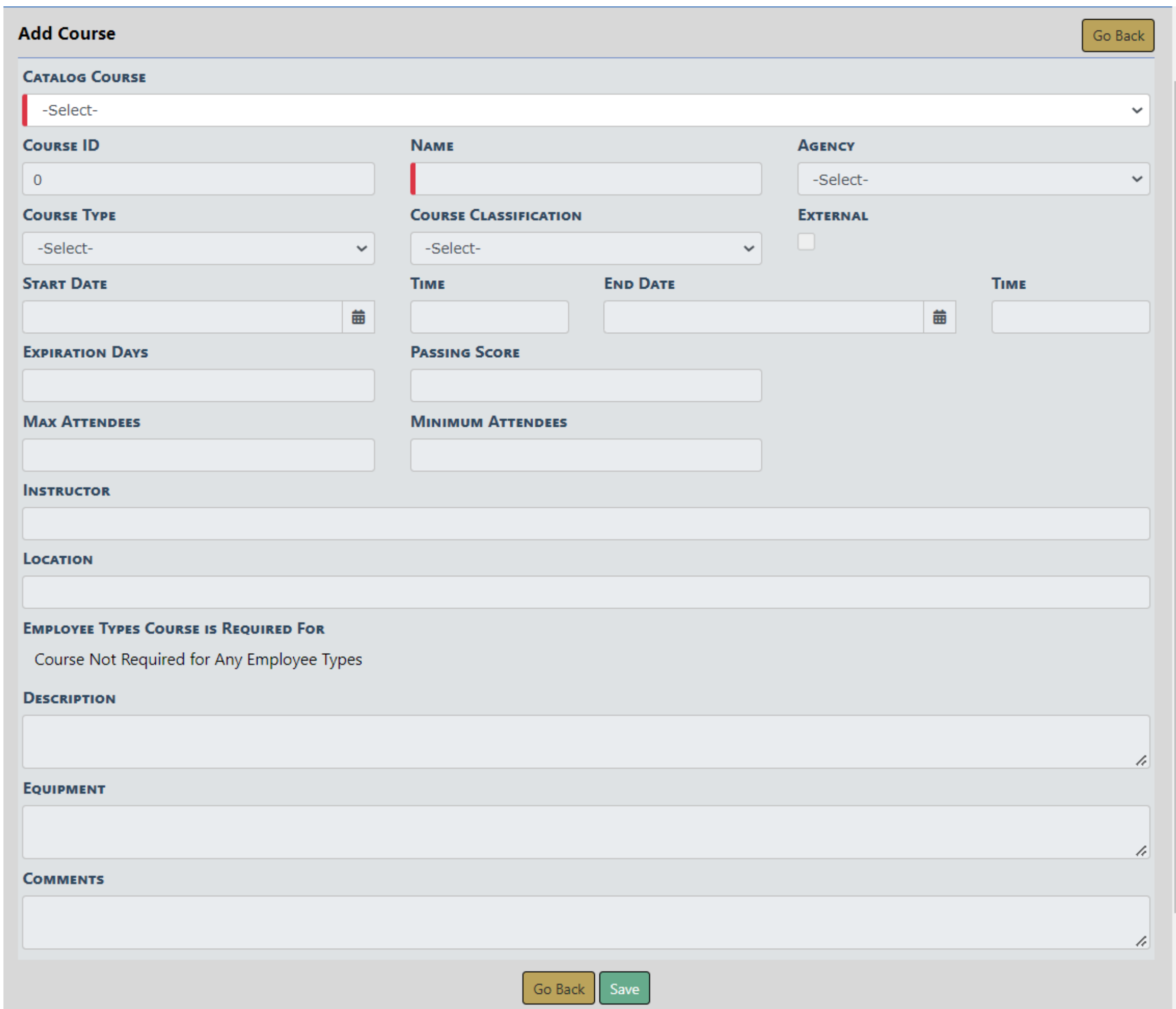
Add Course

Add courses by way of the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 808.

1. Click on the **Manage Courses** button on the **Training** dashboard.

2. The **Course Search** screen appears. Before adding the course, it is recommended you first search for the course to verify whether or not it already exists, though not required. For instructions on how to search for courses refer to "Search Courses " on page 813.

3. Click on the **Add Course** button on the **Course Search** window to open the *Add Course* screen.



- Select a course template from the **Catalog Course** list.

  If you do not see an option on the list that fits the course you are adding, you can select the **-New Course-** option, located at the top of the list, and the system creates a Course Template automatically based on the data you enter on the *Add Course* form. Once you save the record, it will then appear in the **Catalog Course** list and is available to other users who also have the permissions to manage courses.

4. Once you choose a **Catalog Course**, other fields on the form become available to accept data. Enter the appropriate data in the fields provided.

5. Click **Save** to create the Course record, or click **Go Back** to return to the **Course Search** screen without creating the record.

   When you select **Save**, the **Edit Course** screen displays.

   Additional information can be added such as, **Attendees** and **Groups**. For detailed instructions refer to "Edit Course " below.

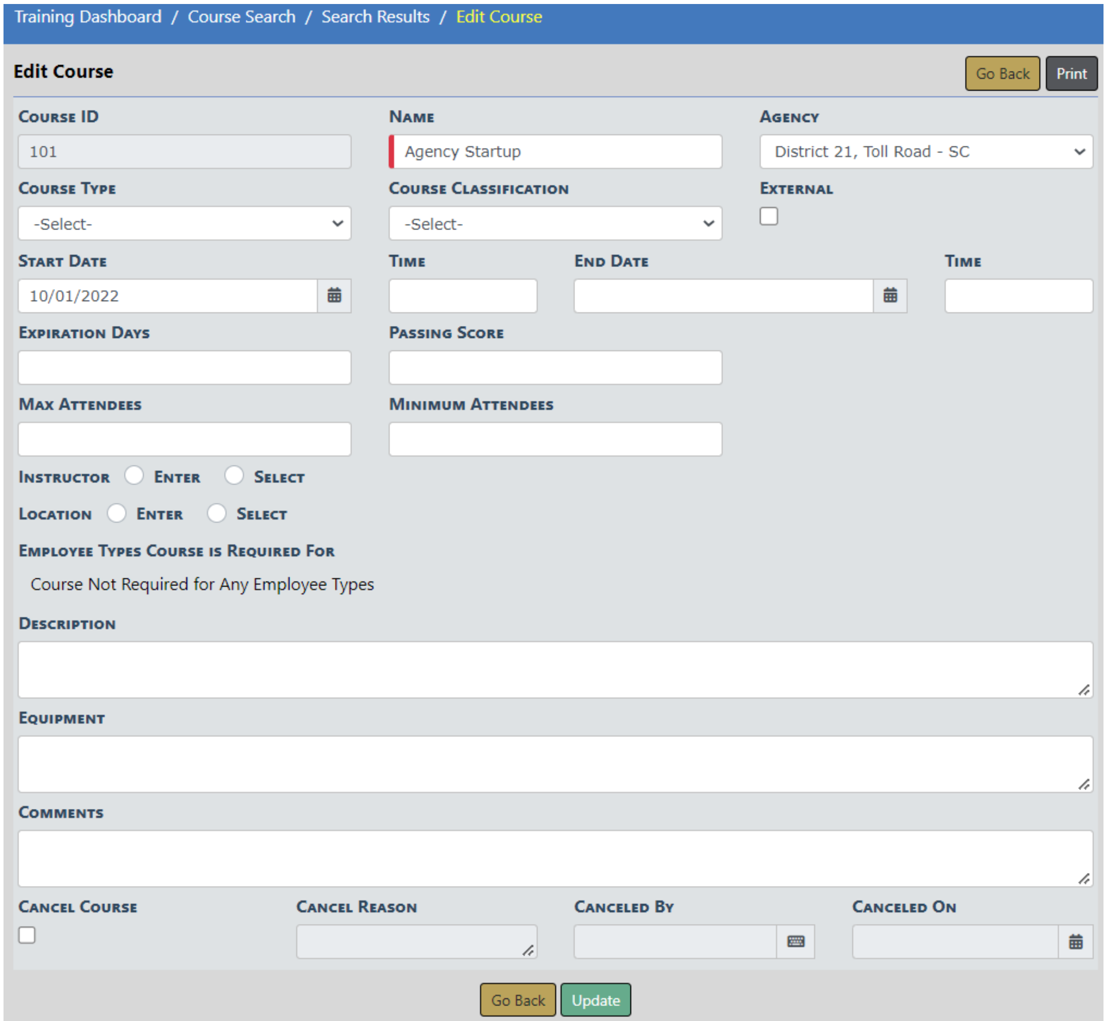
   All **Attachments** and **Prerequisites** reside on the Class Template or Catalog Course that you chose for the class record; if they do not exist on the course template, then they do not appear on your course record. Adding attachments and prerequisites to class templates is an admin function (with the exception of additional attachments specific to this instance).

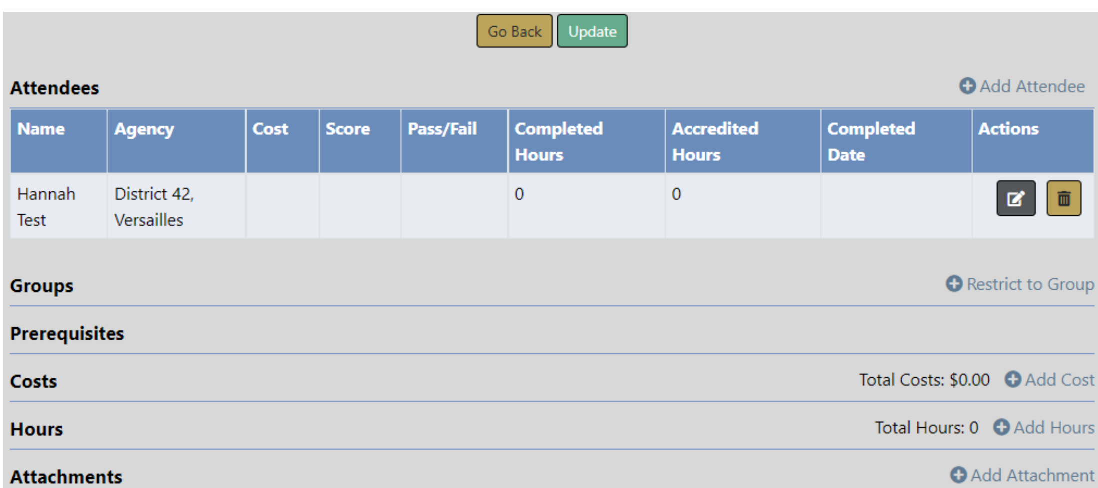
   Note: If you need to add attachments or prerequisites to a course, refer to the Online RMS Admin Guide for instructions or see your administrator.

Edit Course

To edit a course you must first **Search** for the course. The **Search Results** provides the option to edit the course data.

1. Click on the **Manage Courses** button on the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 808
2. The **Course Search** screen appears. Search for the course you want to update. For instructions on how to search for courses refer to "Search Courses " on page 813.
3. In the Course Search Results, click on the **Edit** icon  that appears in the *Actions* column of the course record you want to update. The **Edit Course** form opens.


Training Dashboard / Course Search / Search Results / Edit Course
Edit Course
Go Back
Print
Course ID
101
Name
Agency Startup
Agency
District 21, Toll Road - SC
Course Type
-Select-
Course Classification
-Select-
External
Start Date
10/01/2022
Time
End Date
Time
Expiration Days
Passing Score
Max Attendees
Minimum Attendees
Instructor
Enter
Select
Location
Enter
Select
Employee Types Course is Required For
Course Not Required for Any Employee Types
Description
Equipment
Comments
Cancel Course
Cancel Reason
Canceled By
Canceled On
Go Back
Update


Go Back
Update
Attendees
Add Attendee
Name
Agency
Cost
Score
Pass/Fail
Completed Hours
Accredited Hours
Completed Date
Actions
Hannah Test
District 42, Versailles
0
0
Groups
Restrict to Group
Prerequisites
Costs
Total Costs: $0.00
Add Cost
Hours
Total Hours: 0
Add Hours
Attachments
Add Attachment

4. Make the necessary updates to the existing data, then click the **Update** button to apply the changes, or click the **Go Back** button to return to the **Course Search Results** window, if you wish.

Note: You cannot delete a Course Instance. Enter the appropriate **End Date** if created in error or if you need to end a particular Course Instance for whatever reason.

5. You can **Enter** the instructor for the course, or select the instructor from the drop-down box that becomes available when you choose **Select**.

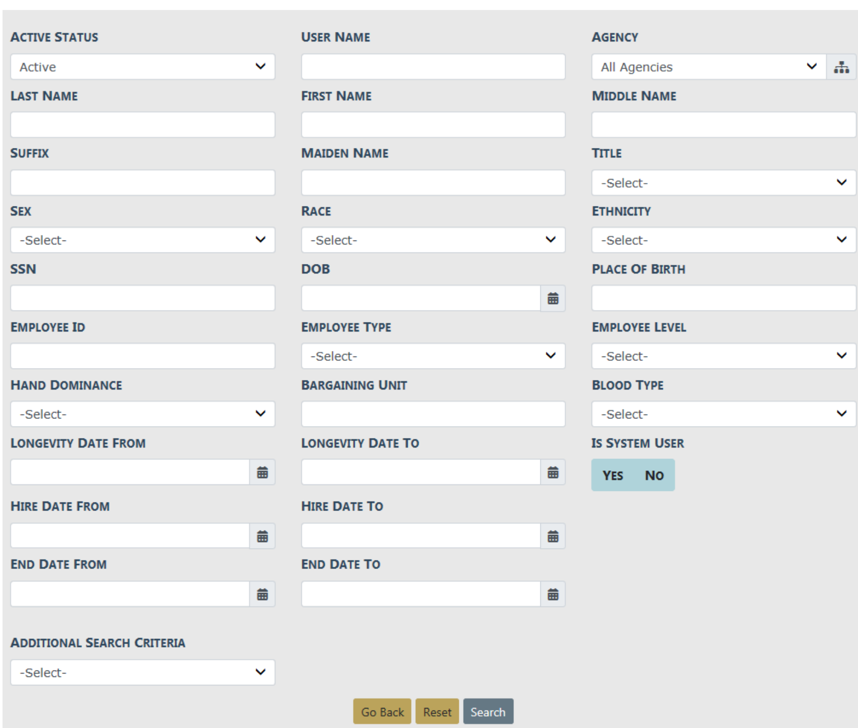
6. You can **Enter** the location for the course, or select the location from the drop-down box that becomes available when you choose **Select**.

7. You can *Add*, *Edit*, or *Delete* an Attendee.

Add an Attendee

a. Click on the **Add Attendee** link while on the **Edit Course** form to add attendees to the class. The **Employee Search** screen appears.

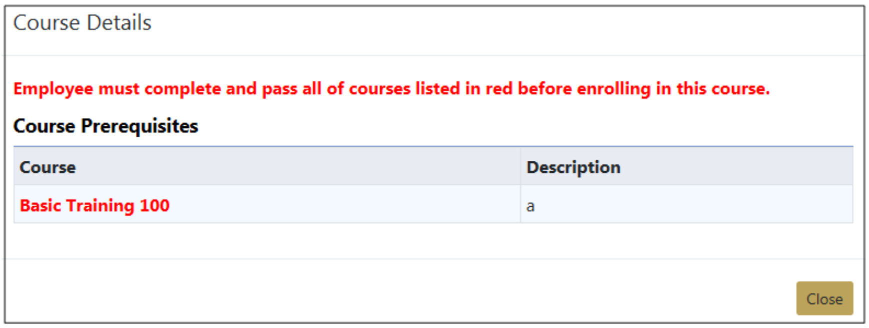
Note: A link will appear on the attendee grid if A) the course template is configured as a requirement for an employee type; and B) employees of that type have not taken the course or are expired.



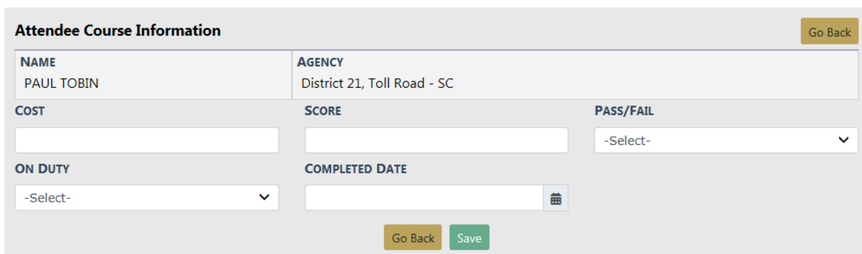
b. Enter the search criteria into the fields provided, then click **Search** to display the **Employee Search Results**.

c. Optionally click on the person's **Last Name** to view the employee record, or click the **Select** icon under the *Actions* column to select and add the person to the course record.

d. If the employee has not yet filled a *Prerequisite* that is associated with the course, a message appears indicating the selected employee cannot yet enroll in this course.

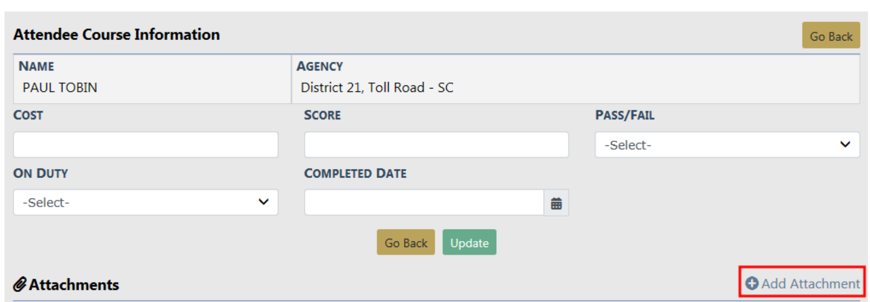


e. If there are no *Prerequisites* to fulfill, the **Add Attendee** form appears.



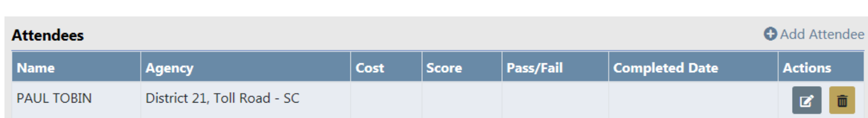
f. Enter the appropriate information then click **Save**, or click **Go Back** to return to the **Employee Search Results** screen without adding the attendee. Leave fields blank that do not currently apply.

g. After clicking **Save**, An *Add Attachment* link appears. Click on the link to attach a photo or document to this attendee record. A prior certification, for example. For instructions on attaching documents refer to "Attachments" on page 69.



h. If you made changes or added attachment, click **Update**, then **Go Back** to return to the **Edit Course** form, otherwise click **Go Back**.

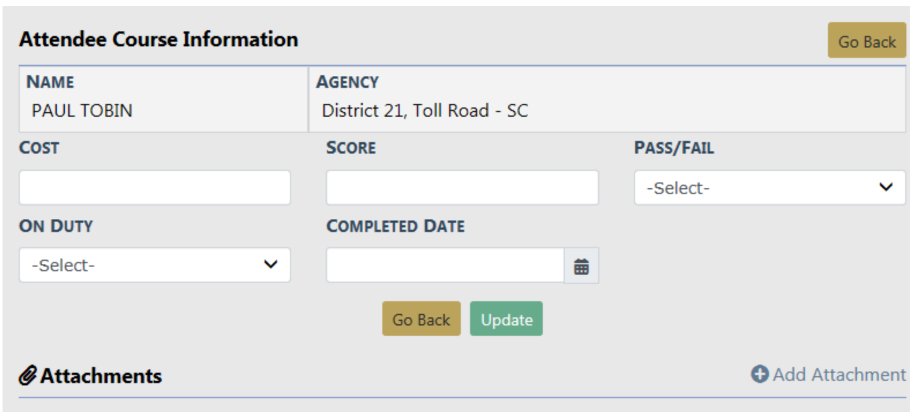
i. Attendees that are successfully enrolled in the course appear in the **Attendees** grid.



Note: When enrolling an attendee, the system also add the course to the attendee's Online RMS Employee record automatically. For more information refer to the *Online RMS Administrator Guide* or your system administrator.

Edit an Attendee

a. Click the **Edit** icon on the attendee record you want to update and the **Edit Attendee** form opens.



b. Enter the relevant information then click **Update** to save your changes.

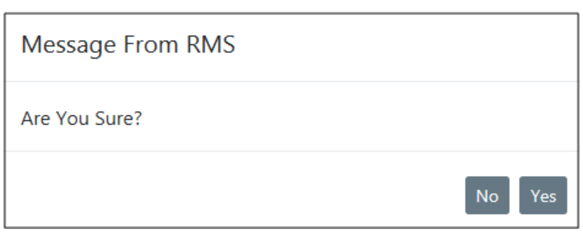
c. Click **Go Back** to return to the **Edit Course** page.

d. Make other needed updates if needed, then click **Update**. Click **Go Back** to return to the **Course Search Results** page.

Delete an Attendee

a. Click the **Delete** icon on the attendee record you want to delete.

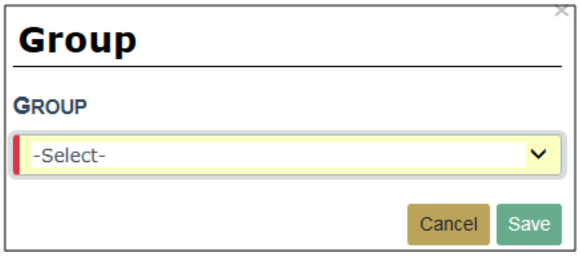
b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Course** window without deleting.



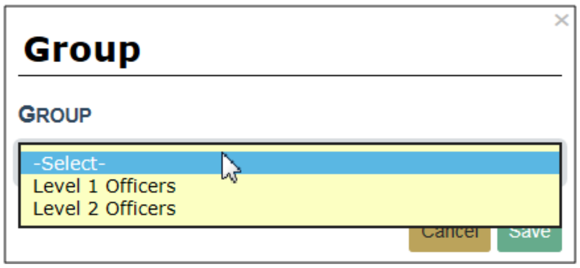
8. You can restrict the class to specific groups.

Add a Group

a. Click on the **Restrict to Group** link while on the **Edit Course** form. The **Group** window appears.



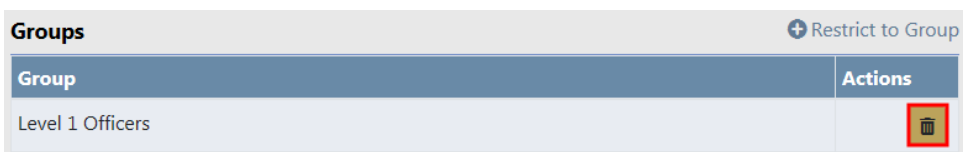
b. Click on the **Group** field and select a group from the list. This list is configurable and is maintained by your administrator.



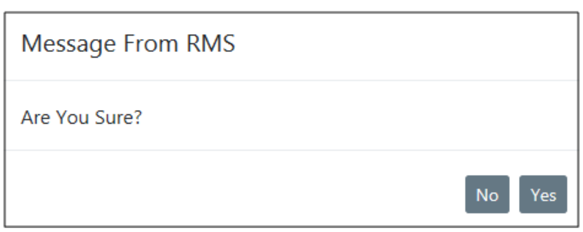
c. Click **Save** to add the group or **Cancel** to return to the **Edit Course** window without adding the group.

Delete a Group from the Course

a. Click the **Delete** icon on the group record you want to delete from the course.



b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Course** window without deleting.



Note: When deleting an enrolled attendee, the system also removes the course from the attendee's Online RMS Employee record automatically. For more information refer to the *Online RMS Administrator Guide* or your agency administrator.

9. Hour categories can be added to the course instance in the same manner as described herein, although the specifics differ. (Categories are defined by an administrator and each

category **may only be added once** to the course instance.) Hours stem from the course template, but can be edited or removed and additional hours added.

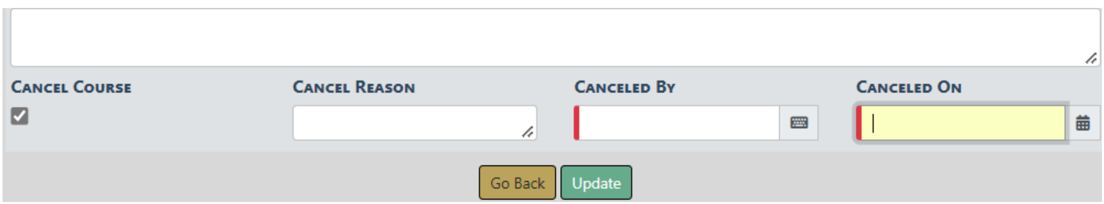
10. Cost categories can also be added to the course instance in the same manner as described herein. (Cost categories are defined by an administrator.) Costs stem from the course template, but can be edited or removed and additional costs added.

11. Additional attachments can also be added to the course instance.

12. Click the **Go Back** button to return to the **Course Search Results** screen.

Cancel Course

To cancel a course, select the **Cancel Course** check box and fill in the fields that become available when the box is checked. Then click **Update**.



Manage Certifications

The **Manage Certifications** button on the **Training** dashboard allows you to, with proper permissions, *Search, Add*, and *Edit* **Certification** data.

To update certification data you must first search for the certification. The search results will provide the option to update or view the certification data.

> **Note:** Once a Certification is created, you cannot delete it. Enter the appropriate **Expiration Days** if created in error or if you need to end a particular Certification for whatever reason.

Associating a certification to an employee is an administrator function. Refer to the *Online RMS Administrative Guide* for details or contact your agency administrator.

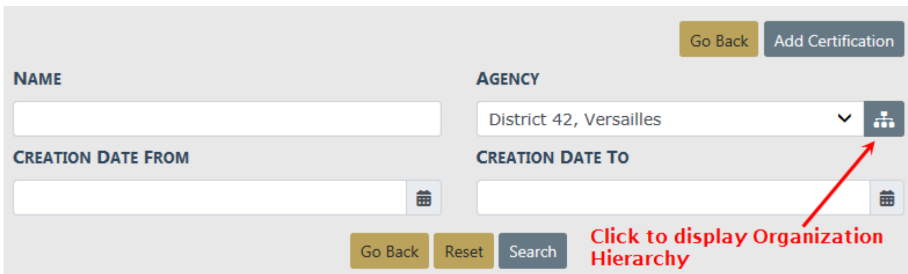
Search Certifications

1. Click on the **Manage Certifications** button on the **Training Dashboard**. For details on accessing the dashboard refer to "Training Module Dashboard" on page 808.

2. The **Certification Search** screen appears.

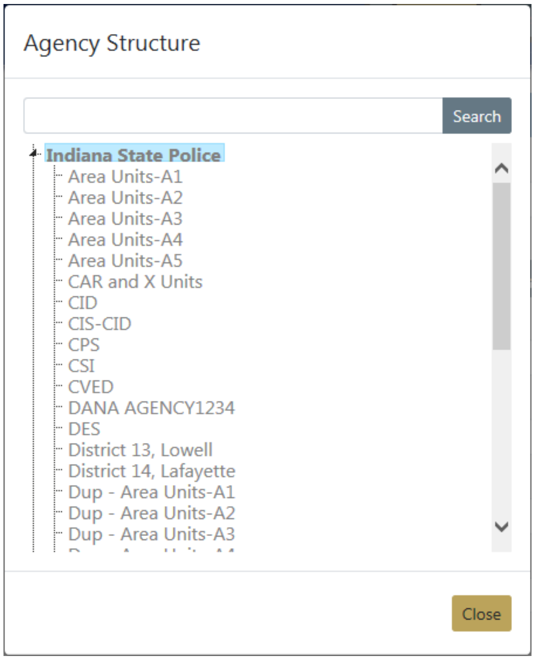
3. With proper permissions you can select an **Agency** within the organization by using two methods.

   a. Click on the Agency field then select from the list that appears.



   b. Click on the hierarchy icon to display the organization hierarchy.

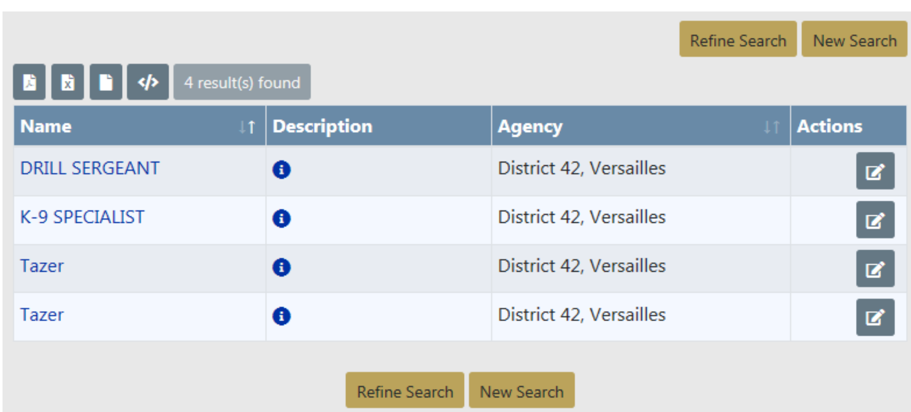
Hover the mouse over an agency to display a list of the agency's units.



Click on the agency you want to include in the search and the agency name appears in the Agency field.

4. Either click **Reset** to clear all fields to start over, click **Go Back** to return to the Training dashboard, click **Search** to display a list of existing certifications that match the entered data, or **Add Certification** to add a certification to the database without first searching. For details on how to add a certifications refer to "Add Certification " on the facing page.

   If you selected **Search** the results display in a grid.



5. Click on the certification **Name** to view details, or click the **Edit** icon in the *Actions* column on the right to edit the certification. For details on editing refer to "Edit Certification " on page 828.

6. Click **Refine Search** to modify your current search criteria, click **New Search** to start the search over.

7. To export search results to a file refer to "Export Search Results" on page 36.

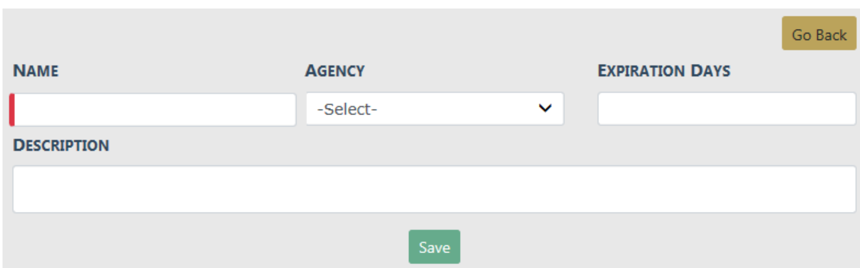
Add Certification

Add certifications by way of the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 808.

1. Click on the **Manage Certifications** button on the **Training** dashboard.

2. The **Certification Search** screen appears. Before adding the certification, it is recommended you first search for the certification to verify whether or not it already exists, though not required. For instructions on how to search for certifications refer to "Search Certifications " on page 825.

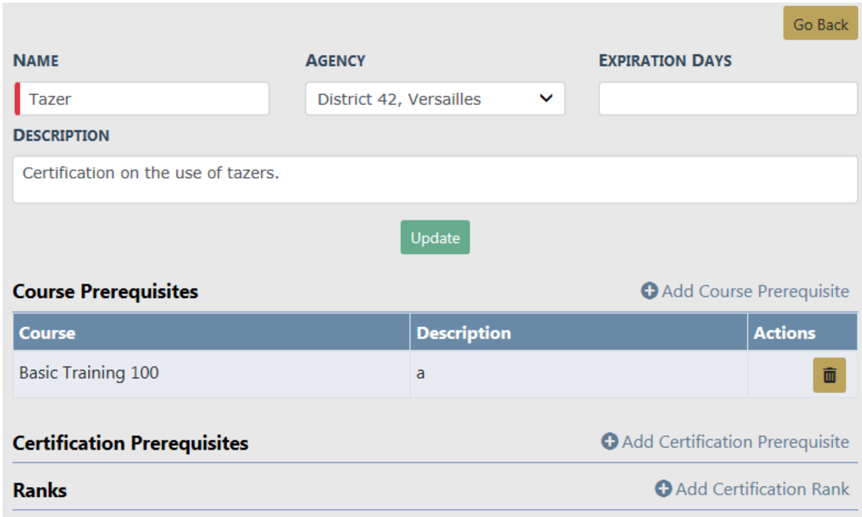
3. Click on the **Add Certification** button on the **Certification Search** window to open the *Add Certification* screen.



- Enter a **Name** for the certification and other application information.

4. Click **Save** to create the Certification record, or click **Go Back** to return to the **Certification Search** screen without creating the record.

   When you select **Save**, the **Edit Certification** screen displays.



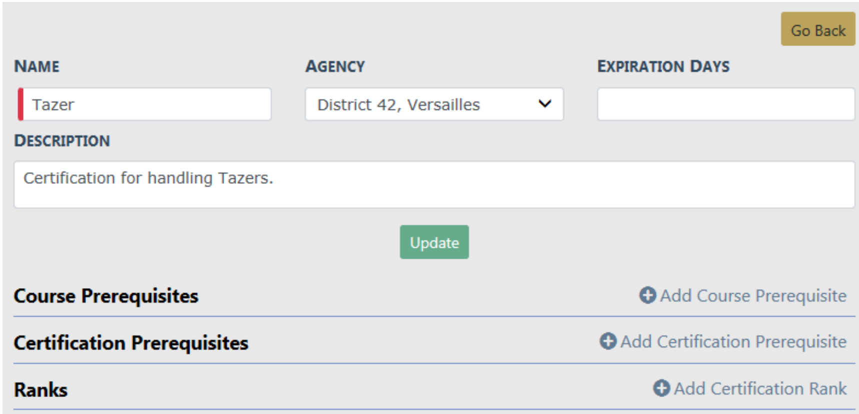
Additional information such as Course Prerequisites, Certification Prerequisites, and Ranks can be added to the certification. For detailed instructions refer to "Edit Certification " below.

Note: A course can only be deleted if it is open and has no attendees associated with it.

Edit Certification

To edit a certification you must first **Search** for the certification. The **Search Results** provides the option to edit the course data.

1. Click on the **Manage Certifications** button on the **Training** dashboard. For details on accessing the dashboard refer to "Training Module Dashboard" on page 808
2. The **Certification Search** screen appears. Search for the certification you want to update. For instructions on how to search for certifications refer to "Search Certifications " on page 825.
3. Click on the **Edit** icon  that appears in the *Actions* column of the certification record you want to update. The **Edit Certification** form opens.



4. Make the necessary updates to the existing data, then click the **Update** button to apply the changes, or click the **Go Back** button to return to the **Certification Search Results** window, if you wish.

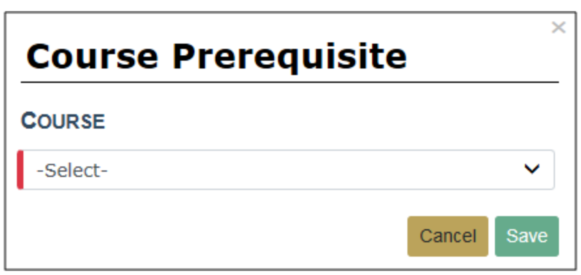
   Note: Once you create a certification, you cannot delete it. Enter the appropriate **Expiration Days** if created in error or if you need to end a particular certification for whatever reason.

5. You can *Add* or *Delete* (remove) a **Course Prerequisite**.

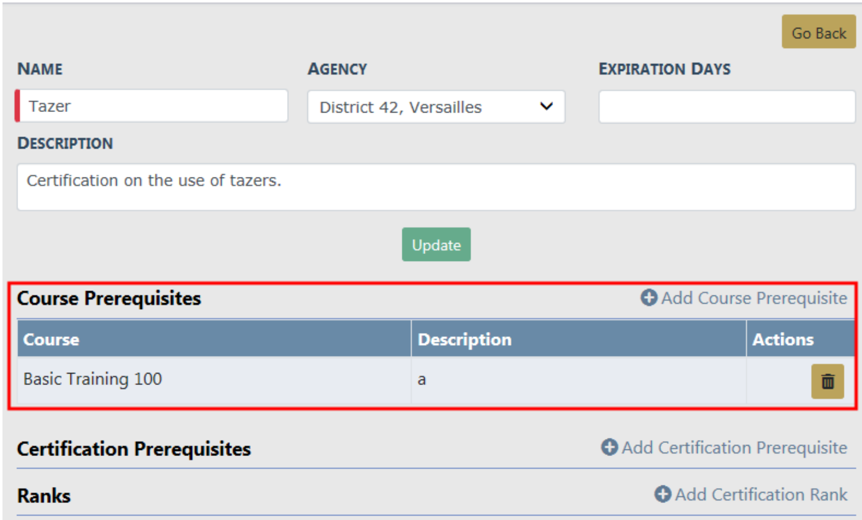
Add a Course Prerequisite

a. Click on the **Add Course Prerequisite** link while on the **Edit Certification** form. The **Course Prerequisite** screen appears.

b. Click into the **Course** field and choose a **Course Prerequisite** from the list that appears. Prerequisites that appear on the list are managed by your administrator. For questions on list content see your administrator.



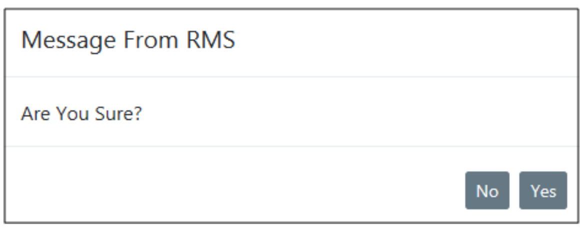
c. Click **Save** to add the prerequisite to the certification or **Cancel** to return to the **Edit Certification** screen without adding the prerequisite.



Delete Prerequisite from a Certification

a. Click the **Delete** icon on the course prerequisite record you want to delete.

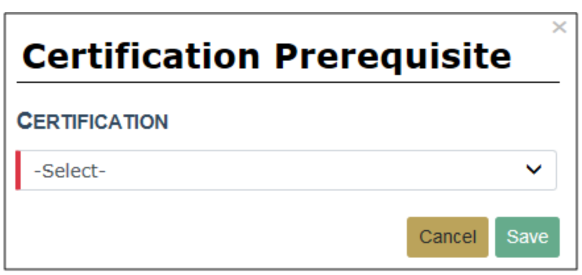
b. A confirmation window appears. Click **OK** to delete or **Cancel** to return to the **Edit Certification** window without deleting.



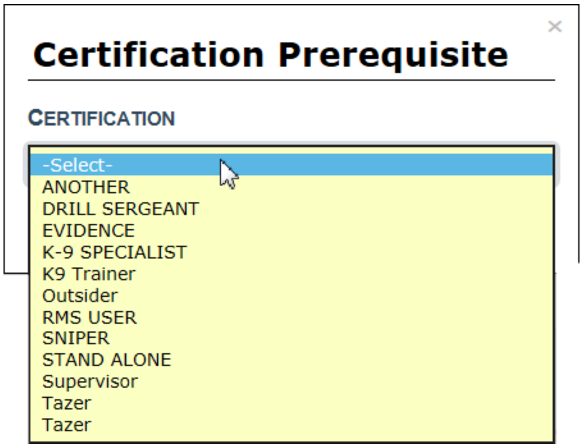
6. You can *Add* or *Delete* (remove) a **Certification Prerequisite**

Add a Certification Prerequisite

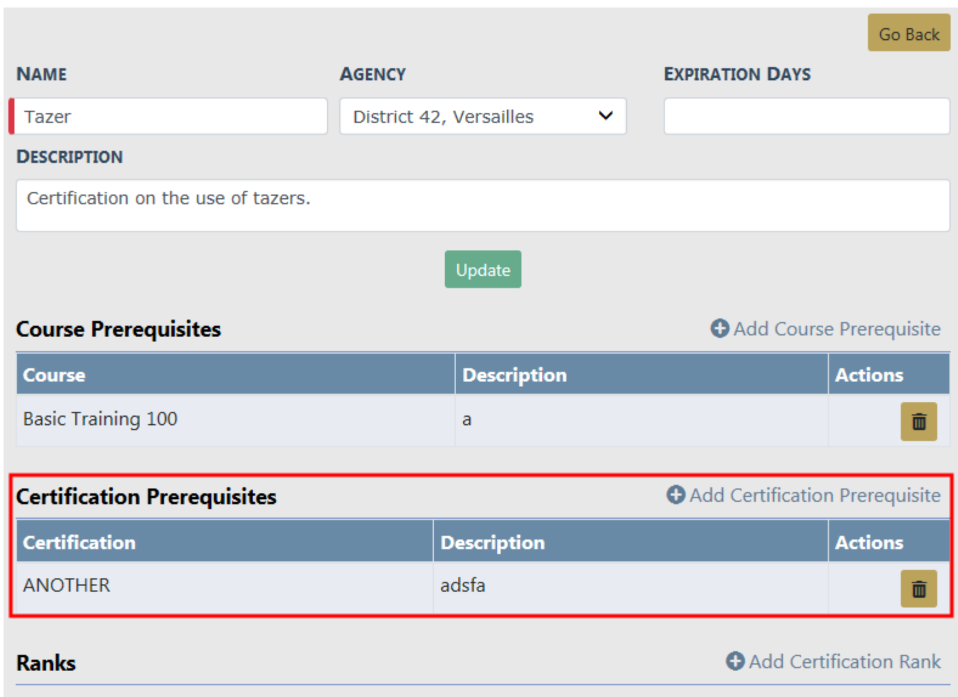
a. Click on the **Add Certification Prerequisite** link while on the **Edit Certification** form. The **Certification Prerequisite** screen appears.



b. Click into the **Certification** field and choose a **Certification** from the list that appears. Prerequisites that appear on the list are managed by your administrator. For questions on list content see your administrator.



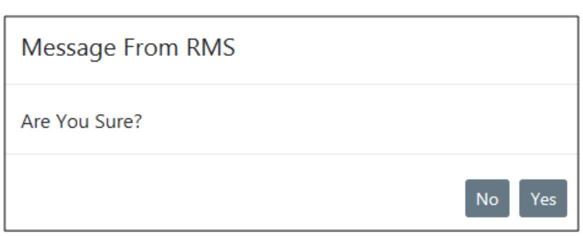
c. Click **Save** to add the prerequisite to the certification or **Cancel** to return to the **Edit Certification** screen without adding the prerequisite.



Delete Prerequisite from a Certification

a. Click the **Delete** icon on the course prerequisite record you want to delete.

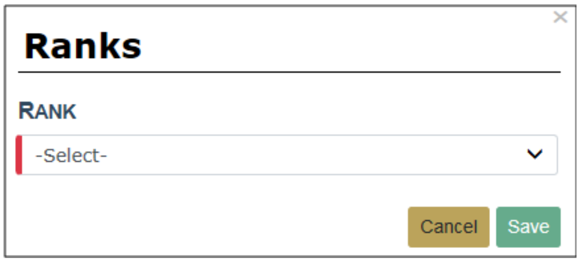
b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Certification** window without deleting.



7. You can *Add* or *Delete* (remove) a **Certification Rank**

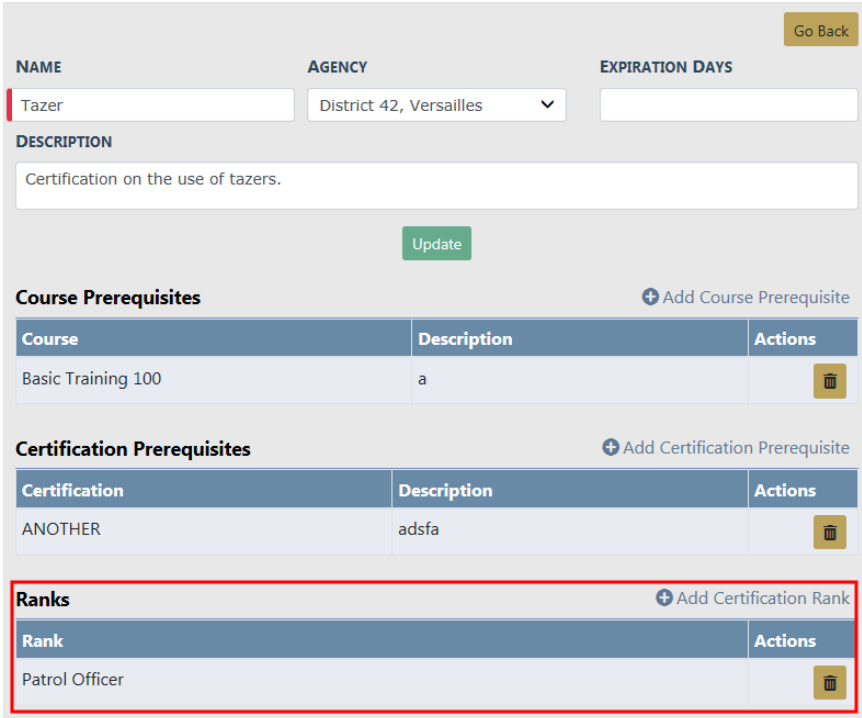
Add a Certification Rank

a. Click on the **Add Certification Rank** link while on the **Edit Certification** form. The **Ranks** screen appears.



b. Click into the **Rank** field and choose a **Rank** from the list that appears. Ranks that appear on the list are managed by your administrator. For questions on list content see your administrator.

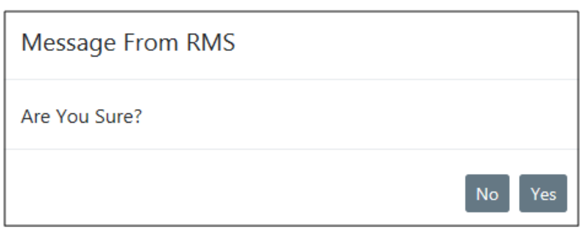
c. Click **Save** to add the rank to the certification or **Cancel** to return to the **Edit Certification** screen without adding the rank.



Delete Rank from a Certification

a. Click the **Delete** icon  on the rank record you want to delete.

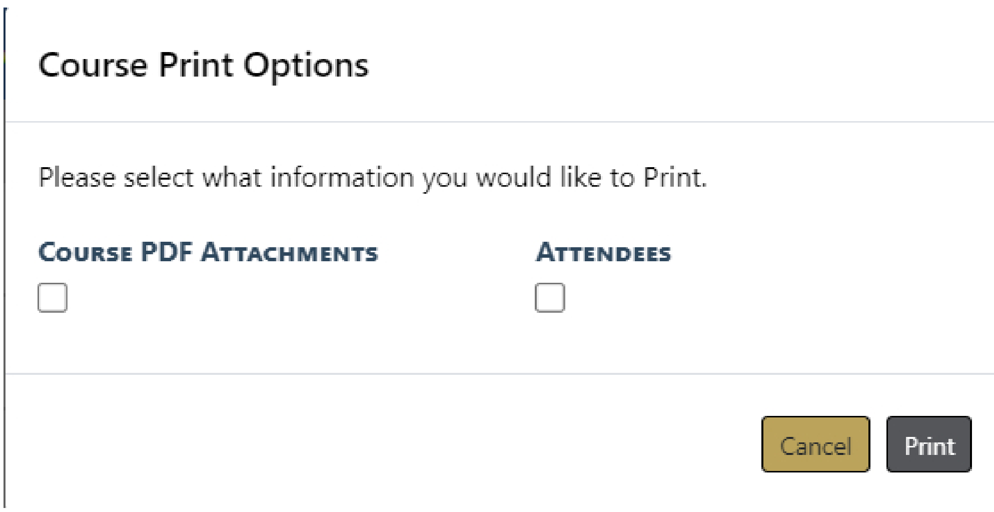
b. A confirmation window appears. Click **Yes** to delete or **No** to return to the **Edit Certification** window without deleting.



Printing Courses

When viewing a course from the Training Dashboard, select **Print** to print course attachments and/or attendees.

Check the box to print **Course PDF Attachments** and **Attendees**, then select **Print** again.



The selected options will print to the corresponding selected printer.

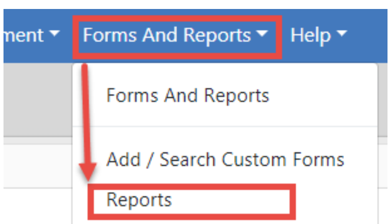
Chapter 38. Reports

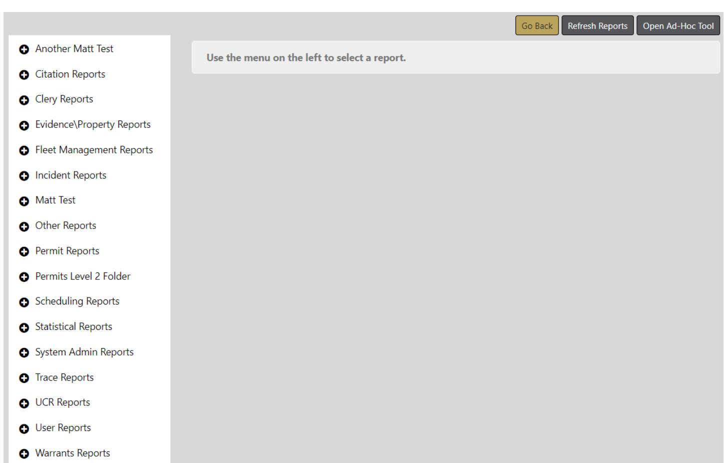
Reports Overview

A **Report** returns a set of data in a structured format, so the information is easy to view, follow, and understand. Online RMS offers a variety reports that can be viewed and printed, such as Incident Reports, User Reports, and NIBRS Reports to name a few. Some reports may include charts or graphs that summarize data at a glance.

Available reports vary by agency and permissions. For more information on permissions refer to your administrator.

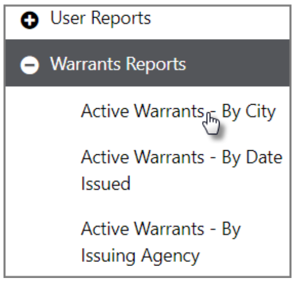
Reports are accessed from the top menu of Online RMS.



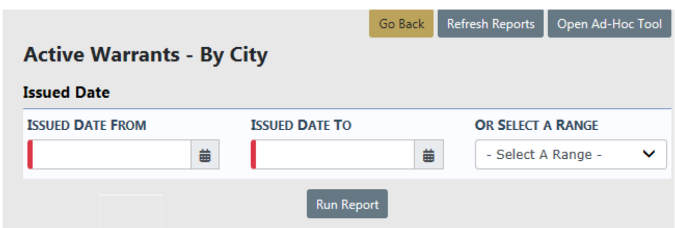


Reports are grouped by Module or custom-grouped by your agency administrator. Click the plus sign (**+**) next to a Module to expand the available reports, then click on a report you want to generate.

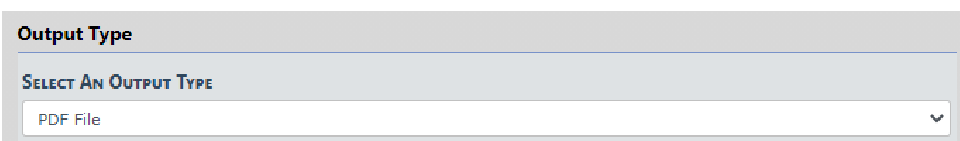
Note: Your agency administrator can custom-group Ad-Hoc reports into their own categories, or add to existing categories. Before Online RMS 11.7.0, all Ad-Hoc reports were listed under Other Reports. For more information, refer to your agency administrator or *Caliber Online RMS Administrator Guide*.



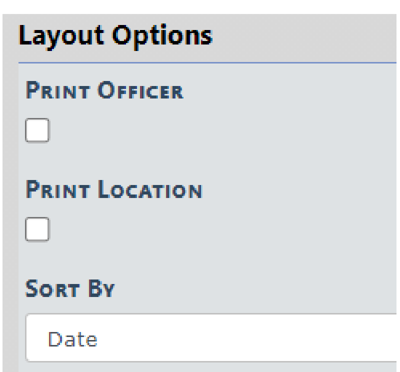
Enter available parameters to restrict the set of records that appear in the report. The *Active Warrants - By City* report below is used as an example. The parameters vary by report.



If applicable, page down to the bottom and select the **Output Type** from the drop-down list.



If applicable, you can choose different layout options for the report, as shown in the Incident Type Report below.



Click the **Run Report** button located at the bottom of the screen.

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

> **Note:** If you are using Internet Explorer, refer to "Printing from Online RMS" on page 39 for special instructions.

Chapter 39. Interfaces

Interfaces Overview

An **Interface** is where two systems meet and interact. Caliber Public Safety leverages this technology to share information between our flagship products. For example, Online RMS accepts Call for Service information from Caliber CAD NG to create RMS Incident Reports and allow users to view CAD Calls for Service (CFS) information while logged into RMS. Another example is where the Court Case Management System (CMS) can retrieve and use Online RMS Citation data using a Web Interface. Standard interface fees may apply to enable an interface.

Citation to Court Case Management System

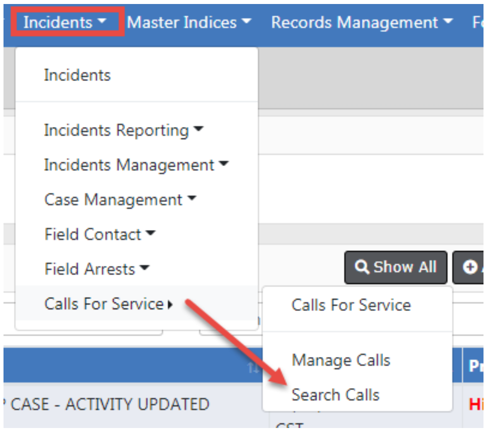
This Online RMS web service loads **RMS Citation**data into the **Court Case Management System (CMS)**as one-way only; data transmits from one system to another but does not return to the originating system.

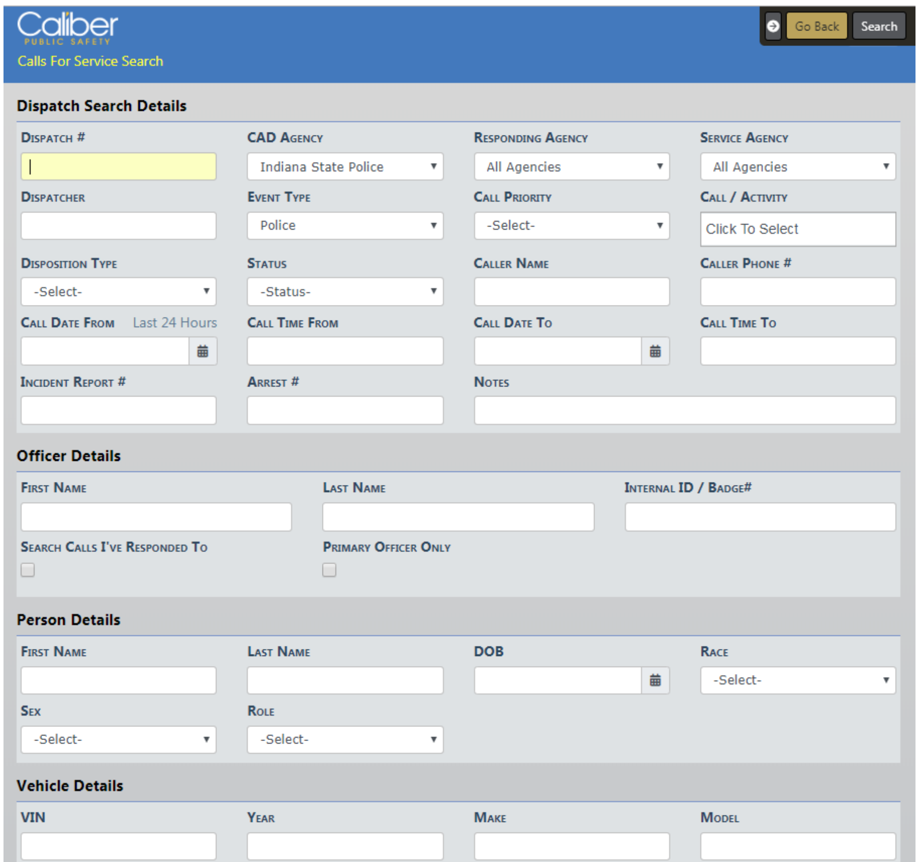
Request a copy of the *Online RMS Web Services Guide* if you are interested in this interface. The standard interface fee applies to enable this interface.

CAD to RMS Calls for Service

Online RMS accepts Caliber CAD NG Call for Service (CFS) information to create *RMS Incident Reports* and allow users to search and view CAD CFS information while logged into RMS. CFS data that is spilled from CAD cannot be modified in RMS.

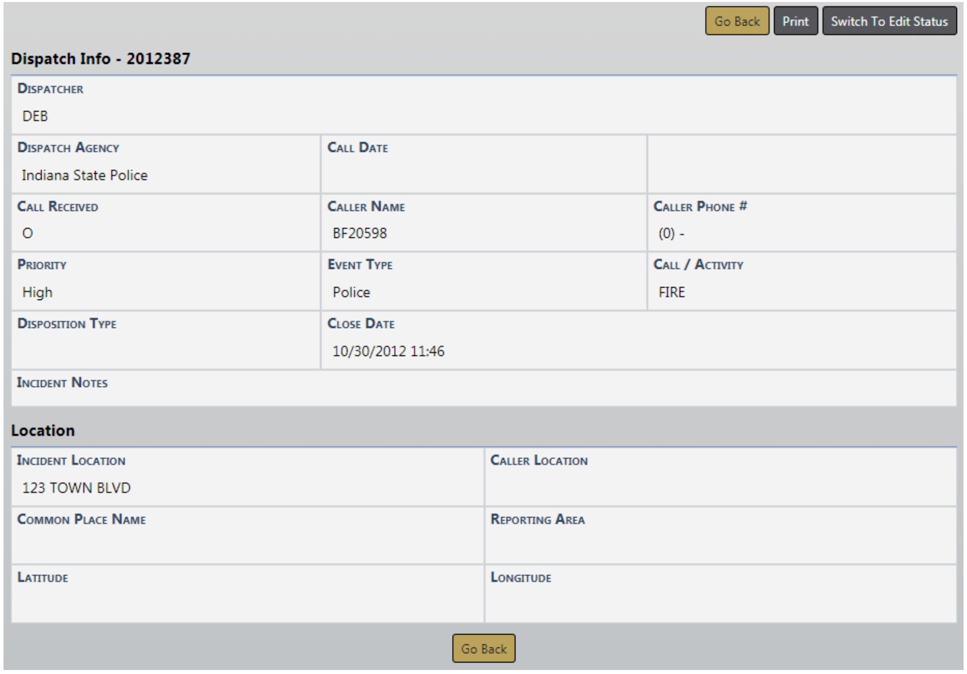
CAD CFS data spilled to Online RMS is searched and viewed from the **RMS Incidents** menu.





Enter the search criteria and click the **Search** button to display *Search Results*.

Click on the **View** icon  that appears in the *Actions* column of the *Search Results* to view CFS details spilled from CAD.



Note: For more information on searching CFS records refer to "Search Calls for Service" on page 183.

Master Vehicles

Prior to Online RMS 11.8.0, the CAD Interface only matched or created Master Vehicles in Online RMS when there was an Incident Report created in the transfer.

With Online RMS 11.8.0, the CAD interface provides a setting to perform one of the following:

- Match or create Master Vehicles from the CAD data transfer with Online RMS Master Vehicles even when there is not an Incident Report created.
- Match or create Master Vehicles from the CAD data transfer with Online RMS Master Vehicles only when an Incident Report is created in the transfer.

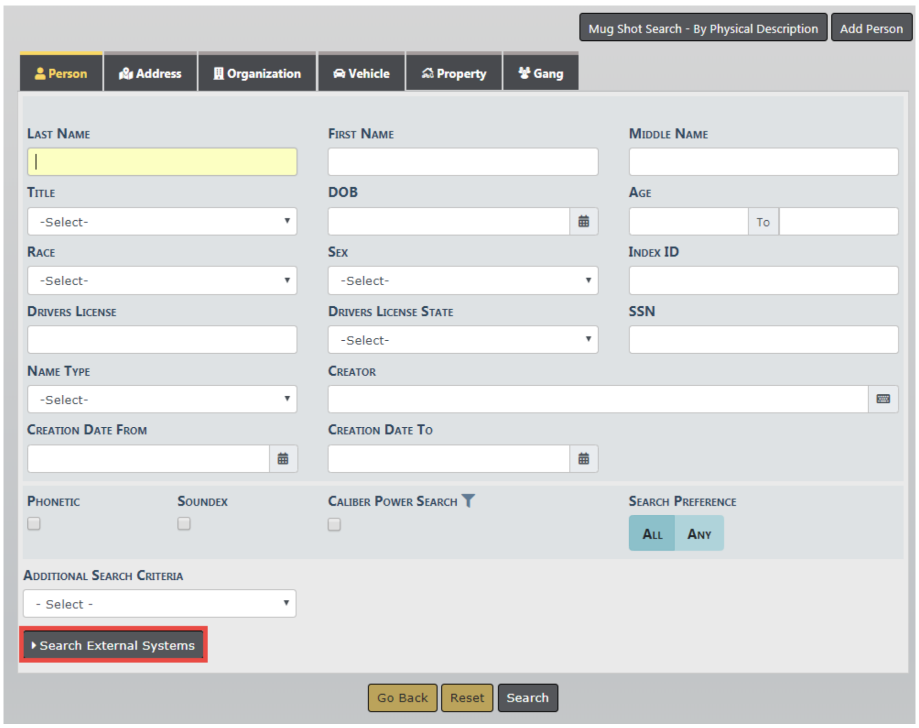
The default minimum matching criteria is as follows:

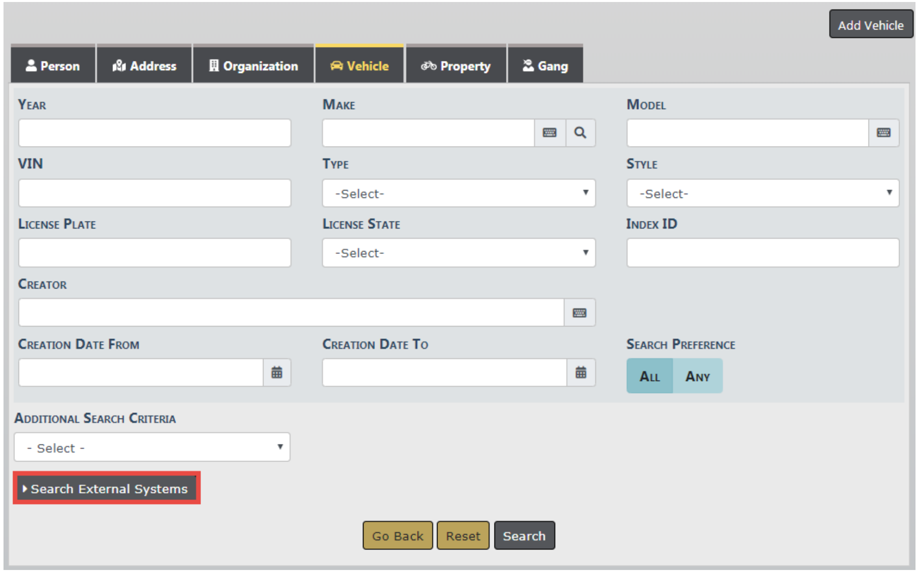
- VIN or Make
- License Plate and Year of the vehicle

Note: Contact Caliber to customize the minimum matching criteria for your agency.

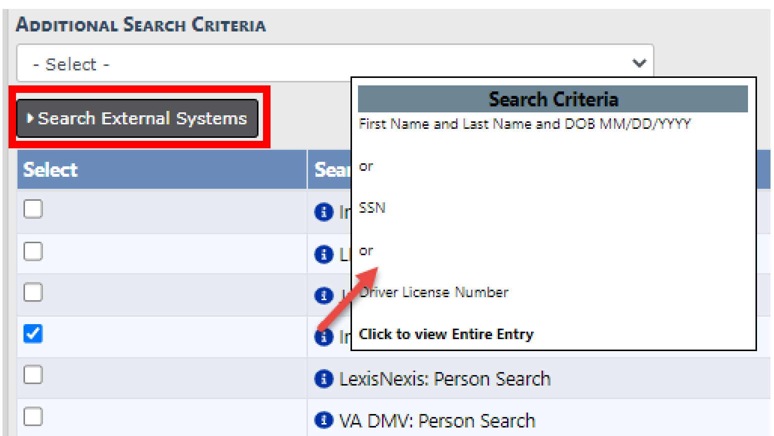
InterDEx Queries

When searching directly from the Person, Vehicle or Property tab on the Master Indices screen, select the **Search External Systems** link to expand the list of available search interfaces for the master indices.





The Search interface displays under the **Search External Systems** button if you have the correct permissions. In this section, hovering over the information bubble by the interface name will determine the required attributes the user must enter for the search to execute.

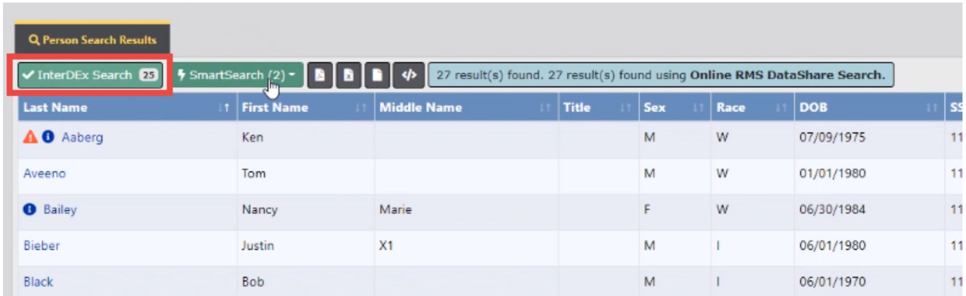


Click the box to the left of the InterDEx search option to select as shown above.

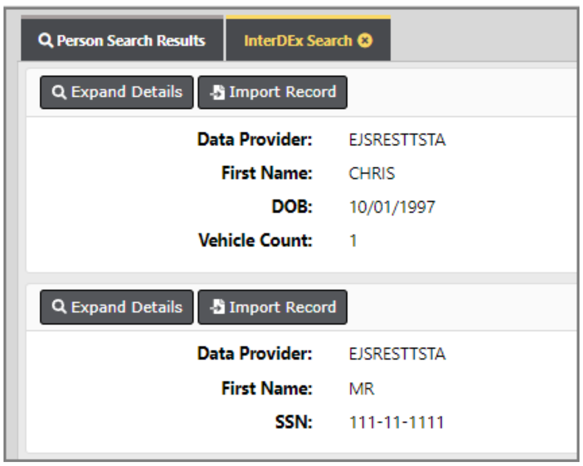
The *Search Status* column contains the **Status** of the Interface. The Status indicates if all required attributes have not been populated for the search.

Once all the required attributes have been met, the Status will change to **Ready**. The Person, Vehicle and Property Master Indices search tabs all work the same.

Once you have the information complete and select **Search**, the Search results displays with a separate button indicating the number of records found. *InterDEx* search runs outside of other external searches, such as SmartSearch for example.



Select the green **InterDEx Search** button as shown above to open the *InterDEx* search results.



Online RMS displays a candidates list of potential matching results returned from *InterDEx*. Select **Expand Details** to view additional information known for the person. Select **Import Record** to create a new master person record using the name information returned.

For details on importing a person record, refer to the *Import/Update Person Results from External Systems* section of "Adding Person" on page 100.

Hunter Camera

If configured for your agency, you can take photos directly from the Online RMS Field Arrest or Master Person Index record using the **Hunter Camera** integration software installed on your local machine. The software associates the images with the *Master Person Index* record.

General Guidelines

- One or multiple Hunter Cameras can be configured. If multiple, then you can choose which camera to use.
- Online RMS requires that the person record have a recent physical description. If the physical description is not recent, Hunter Camera prompts you to enter a new description.

Take Photos

Follow these steps to take photos from the Field Arrest or Master Person record using the **Hunter Camera** integration software:

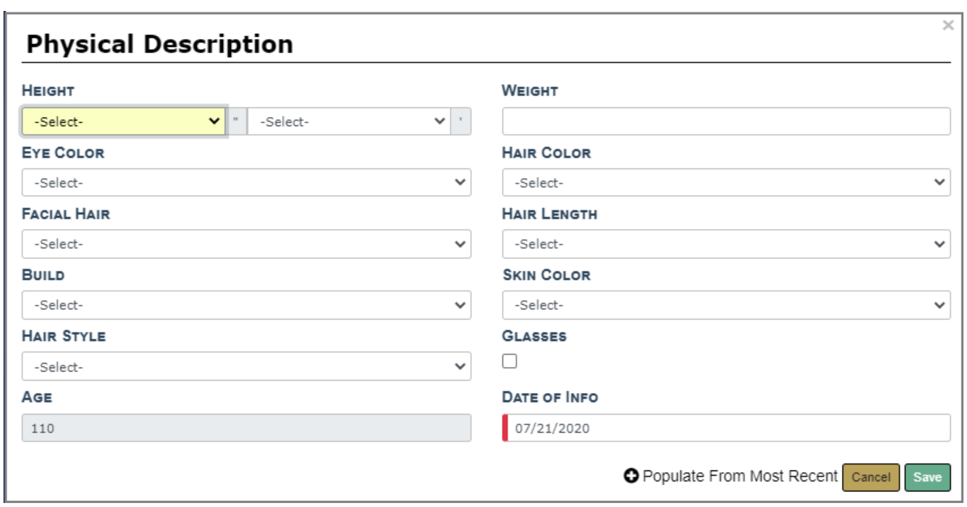
1. Edit the Field Arrest or Master Person Index record, then click on the **Hunter Camera** button on the top right of the screen.

   If your agency and local machine is configured to use multiple Hunter Cameras, first **select** a camera from the drop-down list, then click on the **Hunter Camera** button.

2. If the person's physical description does not exist or is not recent when you click on the camera button, a dialog box appears asking you to enter the physical description.

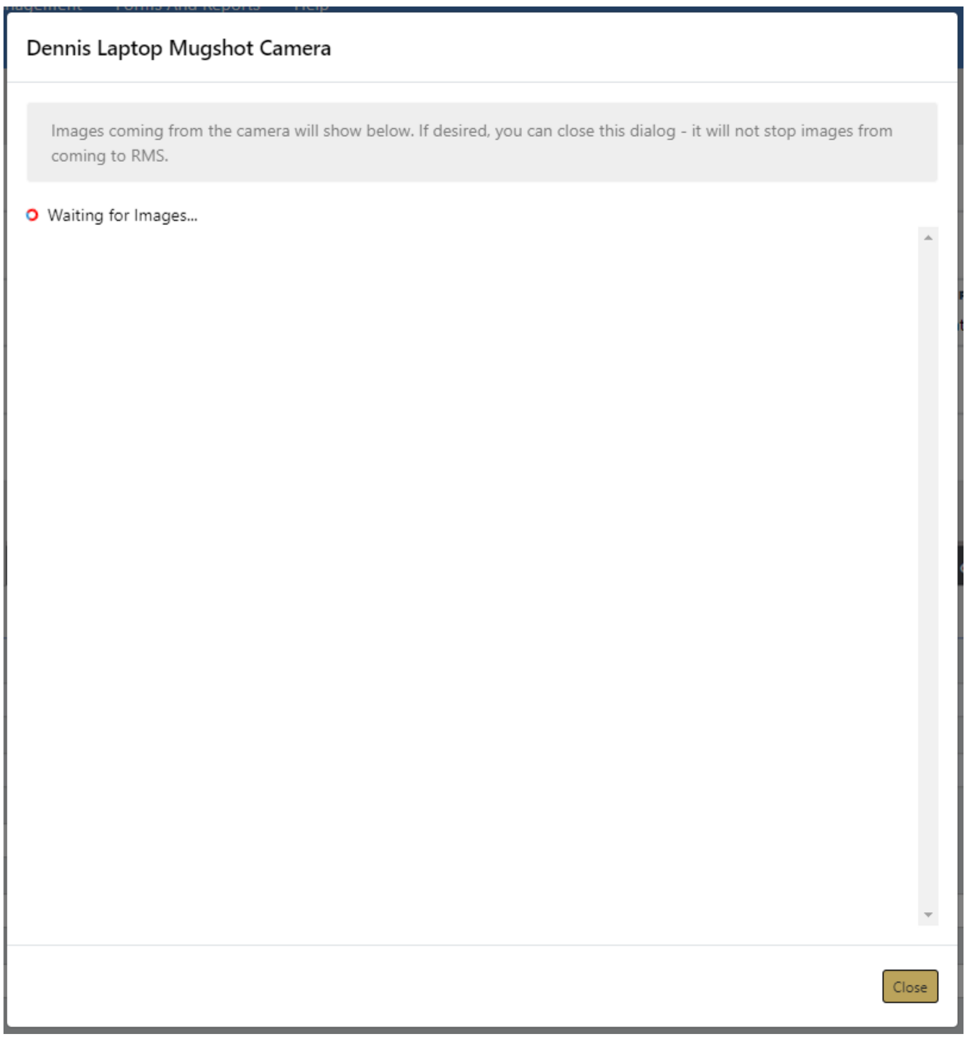
a. Enter data in the fields provided or click **Populate From Most Recent** on the bottom of the dialog box to pull in existing data then make the necessary updates.

b. Click **Save**.

c. The physical description saves and associates to the *Master Person Index* record.

3. **Take** the picture then click **Send** in the Hunter Camera software.

4. The Hunter Camera dialog box appears, waiting for the images to save to the *Master Person Index* record.



Note: You can close the dialog box or keep the dialog box open while another user transmits other images from the Hunter Camera software on their machine; as images transfer to the *Master Person Index* record, the images appear on the upper right of the Field Arrest record.

LiveScan

If configured for your agency, you can transmit arrest and arrestee information, including images to **LiveScan** directly from the Field Arrest record.

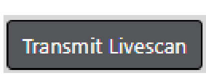
General Guidelines

- Images and the arrestee's physical descriptions are associated with the *Master Person Index* record and not the Field Arrest.
- LiveScan interface requires the arrestte's birth country, birth date, OBTN, and other data. LiveScan prompts you to enter missing data.
- An OBTN is required for LiveScan. If a OBTN does not exist on the Field Arrest, Online RMS creates one automatically.
- Images are not required, but if they exist, the images associated with the most recent physical description are sent through the LiveScan interface.
- LiveScan accepts front, right, and left profile images along with SMT images.

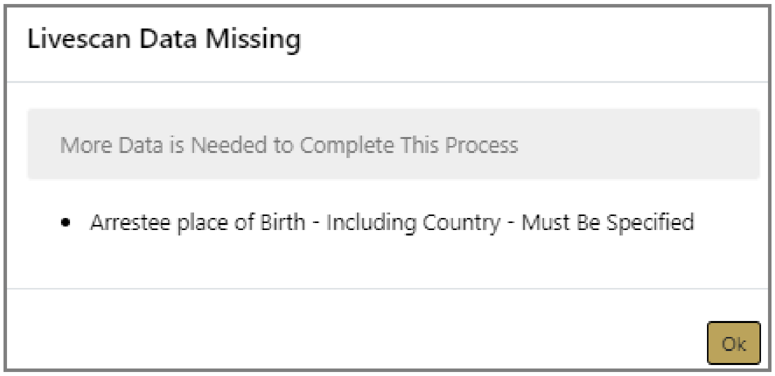
Transmit LiveScan

Follow these steps to transmit Field Arrest data and any images to LiveScan:

1. Access the *Edit Field Arrest* of the appropriate Field Arrest record.
2. Click on the **Transmit Livescan** button on the top right of the *Edit Field Arrest* screen.

3. If LiveScan detects missing data, a dialog box appears with instructions.



a. Click **OK**.

b. Enter the missing information, then click the **Transmit Livescan** button again.

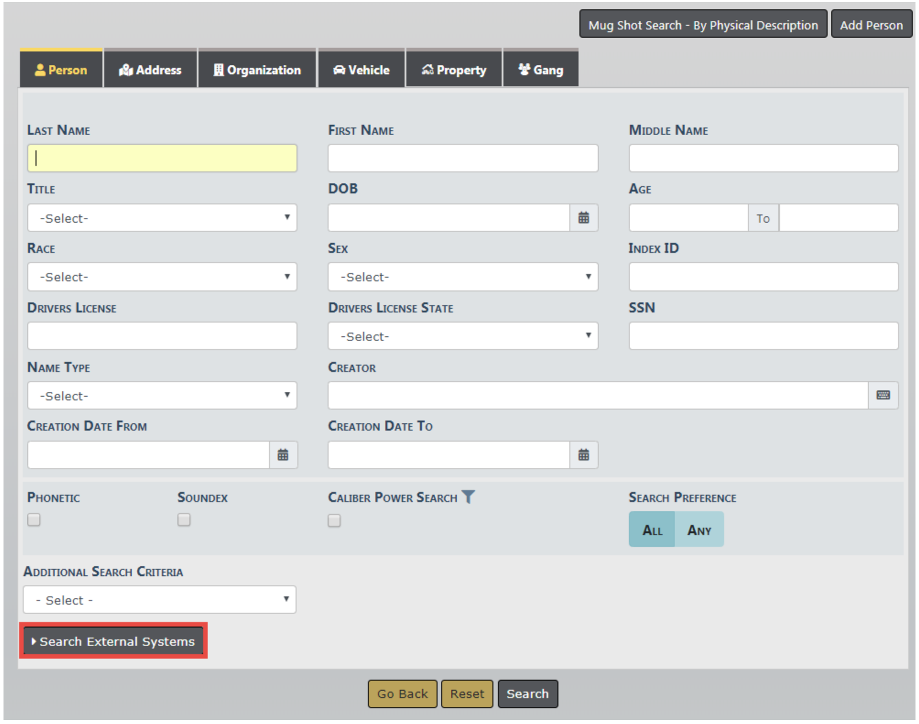
4. Online RMS generates an OBTN number automatically if it doesn't exist.

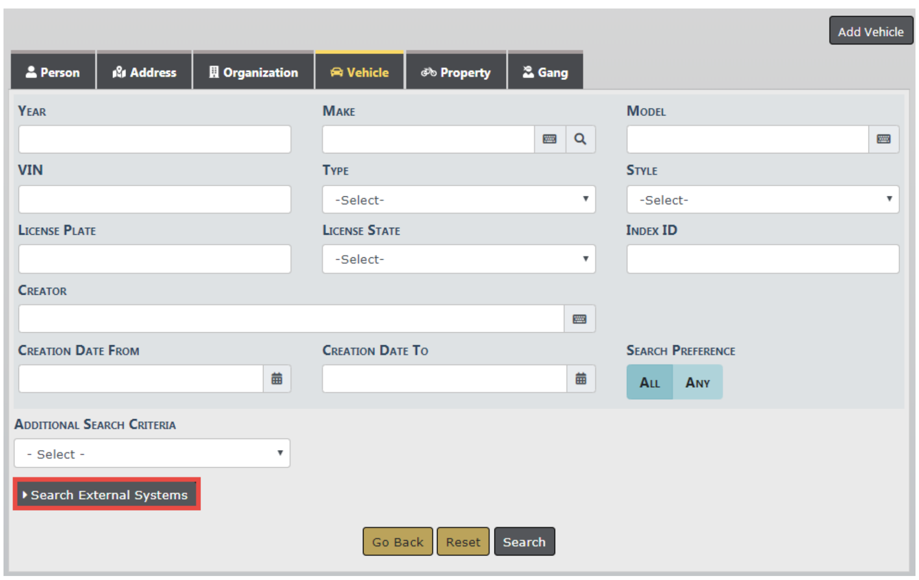
5. A green *successful transmission* message briefly appears across the top of the screen when the transmission completes successfully.

Note: If configured for your agency and the proper software is installed on your machine, you can take photos directly from the Field Arrest or Master Person Index record using the **Hunter Camera** integration software. For more information, refer to “Hunter Camera” on page 844.

LexisNexis Queries

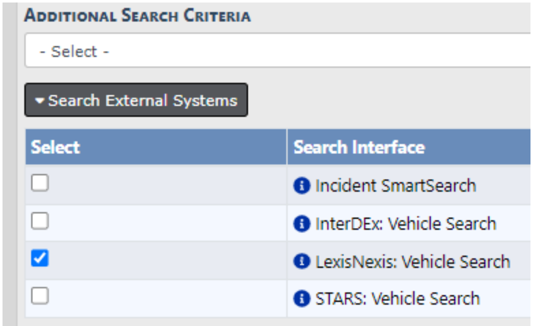
When searching directly from the Person, Vehicle or Property tab on the Master Indices screen, select the **Search External Systems** link to expand the list of available search interfaces for the master indices.





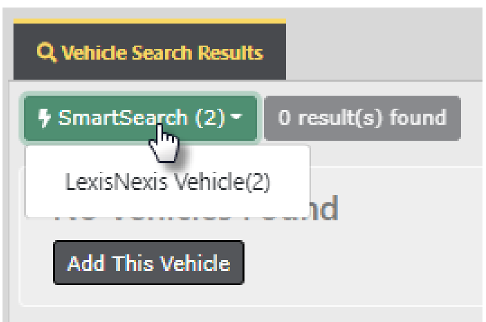
The Search interface displays under the **Search External Systems** button if you have the correct permissions. In this section, hovering over the information bubble by the interface name will determine the required attributes the user must enter for the search to execute.

Click the box to the left of the **LexisNexis** search option to select, then click **Search**. Vehicle search is used in this example.

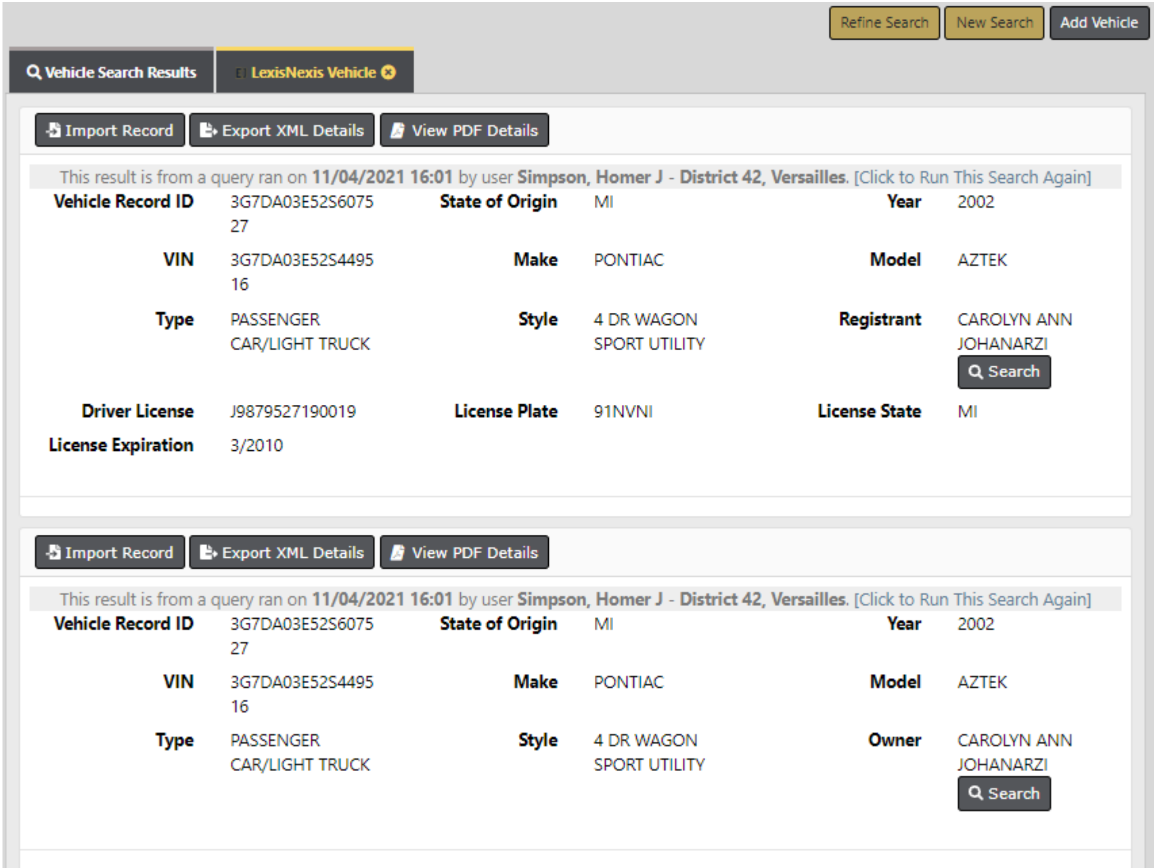


Charges apply per search, so you must select the LexisNexis option as the system does not select it automatically.

Select the **SmartSearch** button, then select **LexisNexisVehicle** to display the search results. The number in parenthesis represents the number of records found.



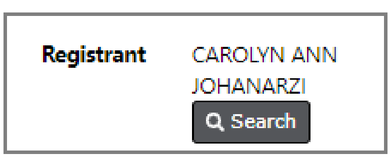
A new tab opens listing the details of the search.



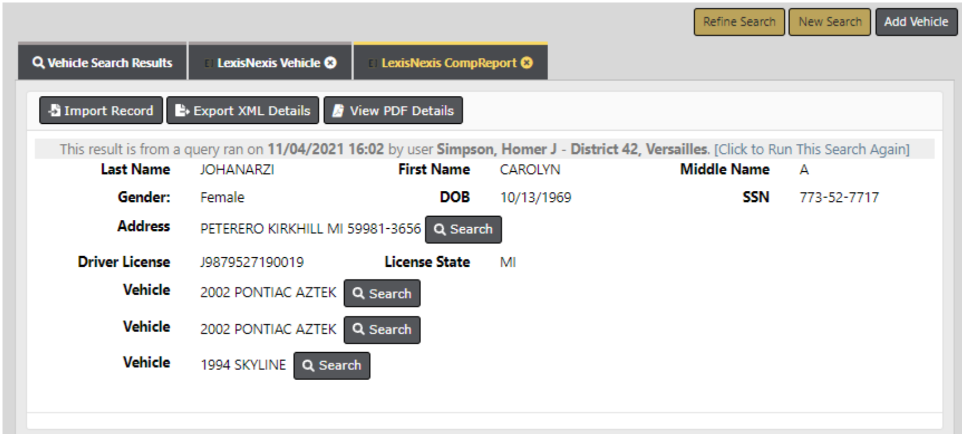
Select **Import Record** to create a new master record, select **Export XML Details**, or **View PDF Details**.

Importing a person or address record use a similar process. For an example of importing a record, refer to the *Import/Update Person Results from External Systems* section of "Adding Person" on page 100.

You can also drill down to perform additional searches where you see the **Search** button. The Registrant is used in this example.



Click the **Search** button to view details of the Registrant.



As long as you see a **Search** button, you can drill down even further for more information.

A new tab opens each time you click on a **Search** button.

You can move between tabs, or close each down by clicking on the **X** in the tab header.

Appendix A. Training Accounts

Generic Training Accounts

When you connect to the Online RMS Training Database, you may utilize any of the following generic accounts. Each role has a selection of accounts and can be used by multiple individuals. These accounts are available for any actions you wish to perform in the Online RMS system. The training system does not contain any real criminal data so please ensure you only enter test data. For example, we often use cartoon characters or invented names and identifiers. Real address locations can be utilized to view the mapping functionality.

Simply go to the following website to enter the Online RMS Training DB:

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

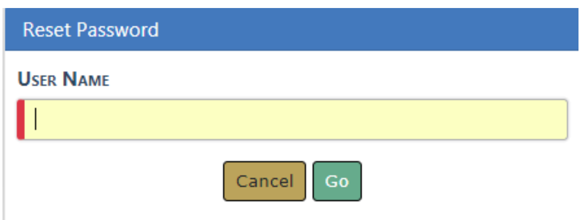
Training Accounts user IDs and passwords will be distributed by the administrator.

Appendix B. Resetting Passwords

Resetting OnlineRMS Password

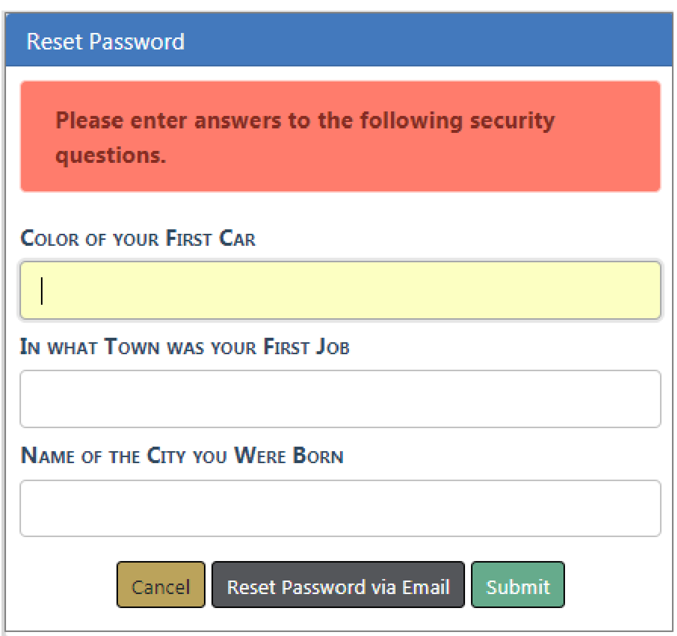
This guide explains how to reset the Online RMS password from the workstation web browser.

- Click the **Reset Password** link at the Online RMS login screen.
- Type the **User ID** and click the **Go** button.



- For added security, the user will be prompted with three security questions. There are different questions available and they are configurable by the administrator or user with proper permissions. Answer the security questions and click the **Submit** button.

Questions can vary by user and apply only when configured.



Note: If you have forgotten your password click on the **Reset Password via Email** link to receive a confirmation email. For further assistance contact your agency administration or refer to "Forgotten Password Procedure" below

Note: If no user security questions are found in the system, a window appears where you must reset your password via email.

- Once the credentials are validated, the user is taken to the *Change Password* screen.
- The password rules are as follows:
  - The minimum password length shall be 8 characters.
  - Passwords shall be case sensitive.
  - Passwords shall be alphanumeric and allow for special characters.
  - Passwords shall contain at least one lower case, one capital letter, and one number
  - Passwords shall need to be reset every 90 days.
  - Passwords will be on a rotation of three (10) passwords.
  - The maximum amount of password attempts is five (5). Once the account is locked, the password will need to be changed.
- Type a new password in the **Enter** and **Re-Enter** fields and click **Submit**.
- A warning message will appear if the password rules are not followed.
- Once completed, the user will be transported to their *Home* screen.

Note: Click the **Cancel** button to abort the process at any time.

Forgotten Password Procedure

With the release of Online RMS 10.9, we have instituted a security policy that every user have a unique email address associated to their account. This requirement grants users with improved, self-administered password resets.

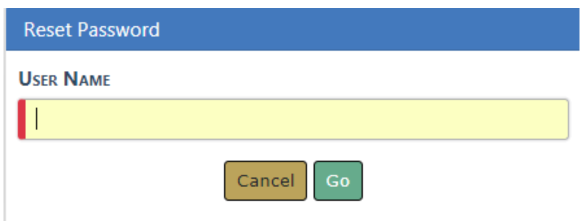
Note: In addition, this complies with the CJIS policy many of our users must follow. For information about this and the email address requirement, review the additional document called Secure Email Account Requirement for Online RMS users.

To facilitate the self-administration for forgotten passwords and/or security questions, Caliber Public Safety has implemented a new **Reset Password** procedure at the Online RMS login screen.

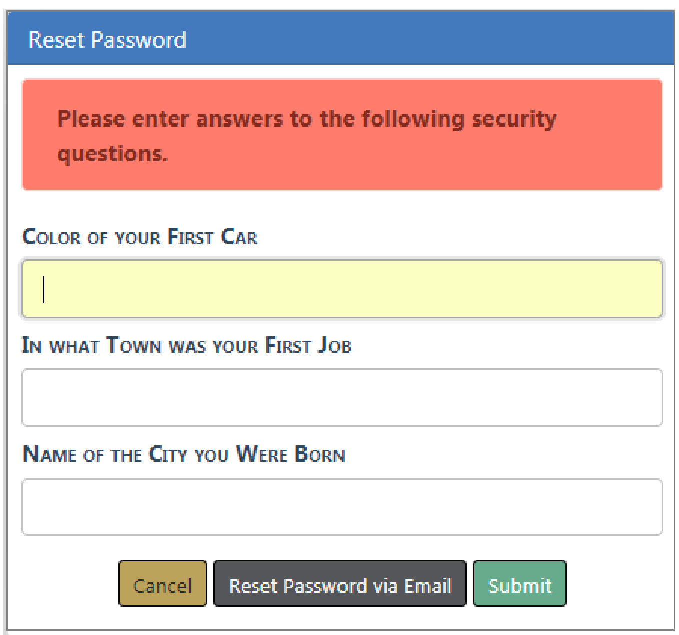
The reset password procedure will work in the following fashion:

1. At the Online RMS login screen, click the **Reset Password** link.

2. Type the **User ID** and click the **Go** button.



3. Click on the **Reset Password via Email** link to receive a confirmation email



4. You are prompted to provide the unique email address on file for your user account. Enter the email address then click the **Go** button. A confirmation message displays on screen:

   “A new password has been sent to your email address. Please follow the instructions on the email for further information.”

If an incorrect email address is given, an error is presented and you cannot continue with the password reset.

5. An email is sent to you from Online RMS with the new temporary password.

6. Login with your User ID and this temporary password. You must re-register your account by:

   - Providing three new and unique security questions (using the drop down fields).
   - Providing answers to these new security questions.
   - Resetting and confirm a new password (following the same secure password rules when they initially registered their accounts)

Appendix C. Incident Based Reporting

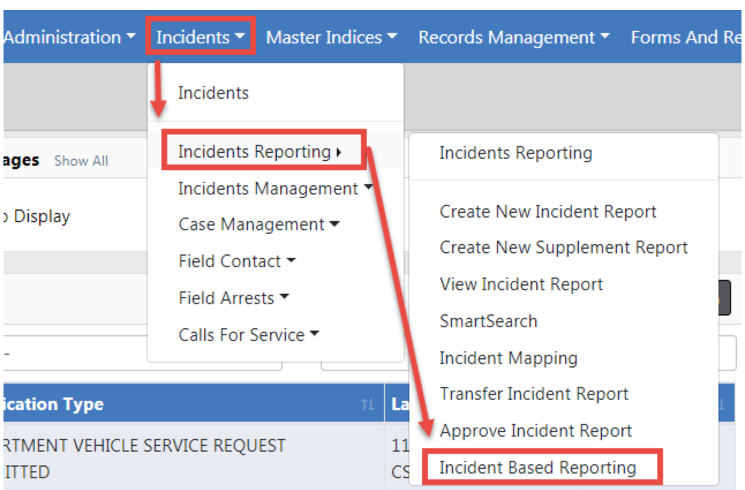
Overview

The purpose of this document is to provide instructions on producing Incident Based Reports from the Online RMS application. The application collects FBI data based on the National Incident Based Reporting (NIBRS) requirements.

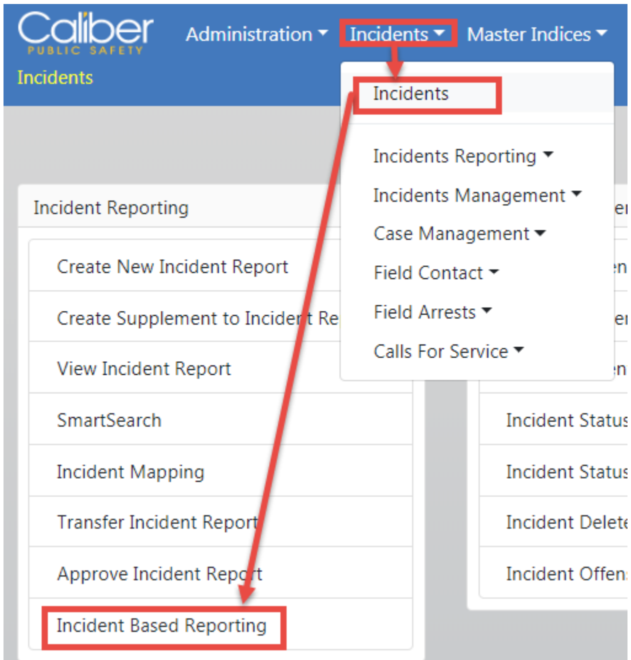
You access a data set (file) that contains all Agency reports that have a reportable offense that is in approved status. They filter out the reports for inclusion in the file to be used to create the NIBRS Reports. This is typically on a monthly basis but can be filtered as necessary.

1. From your *Home* page there are three ways to access the **Incident Based Reporting** module of the application.

   a. Incidents>Incident Reporting>Incident Based Reporting

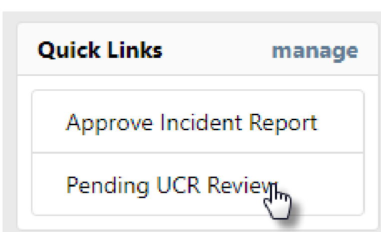


   b. Click on the *Incidents* tab and when the *Main Incident Menu* opens find **Incident Based Reporting** under the *Incident Reporting* header.

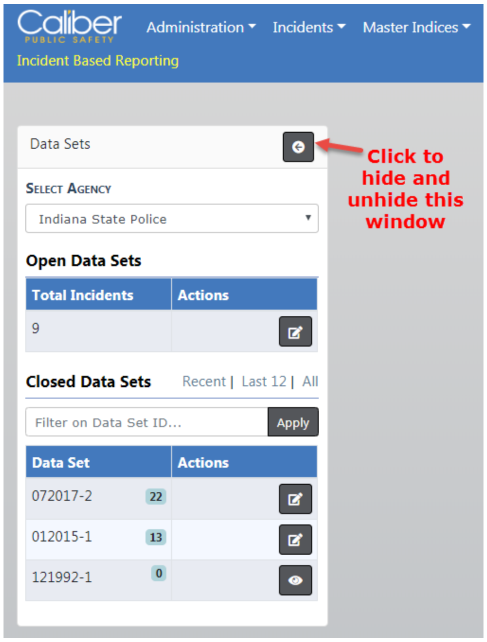


c. If available, click on the **Pending UCR Review** link in the *Quick Links* box. If the **Pending UCR Review** link doesn't appear, you can with appropriate permissions, add this link to the *Quick Links* box. This appears only on your Home Page, no one else's. For instructions, refer to the Quick Link section of "Home Page - Prior to RMS 11.12" on page 8.

Note: While UCR functionality is still available within Online RMS, the FBI is no longer accepting UCR Summary Data as of Jan 1, 2021.



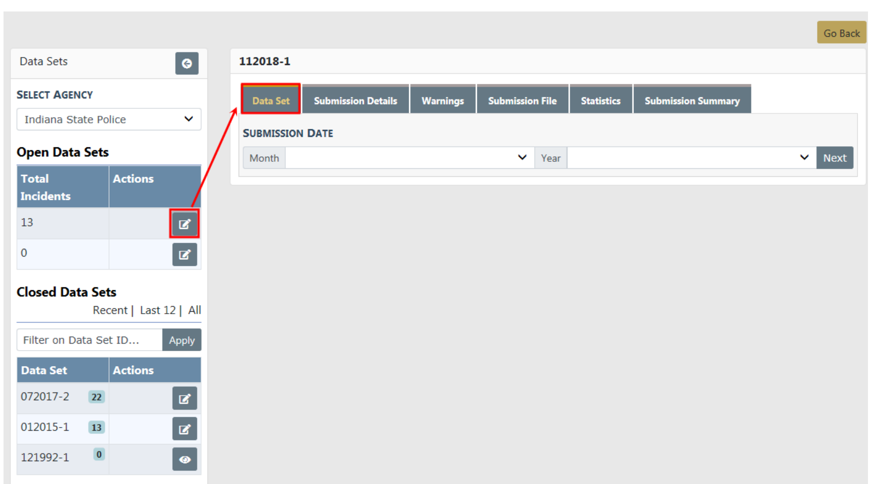
Any option above opens the *Data Sets* details page:



2. Accessing *Open Data Sets*.

a. Find the *Open Data Set* you want to open and click on the **Edit** icon under the *Actions* column.

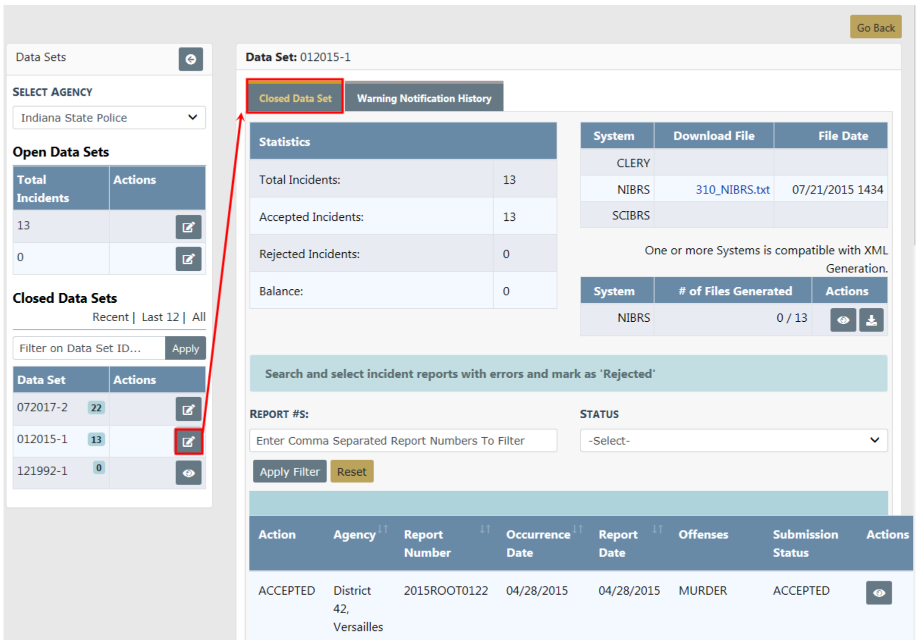
The right windows display six tabs of *Open Data Set* topics, defaulting to the **Data Set** tab.



3. Accessing *Closed Data Sets*.

a. Find the *Closed Set* you want to open and click on the **Edit** icon under the *Actions* column.

The right windows display two tabs of *Closed Data Set* topics, defaulting to the **Closed Data Set** tab.

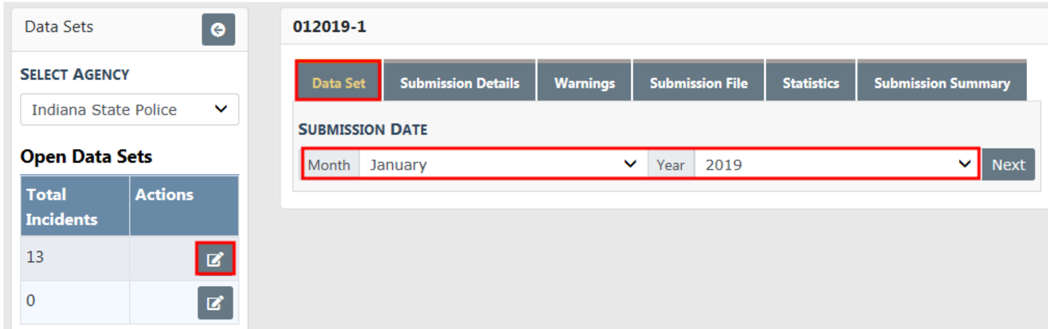


Role and Permission Requirements

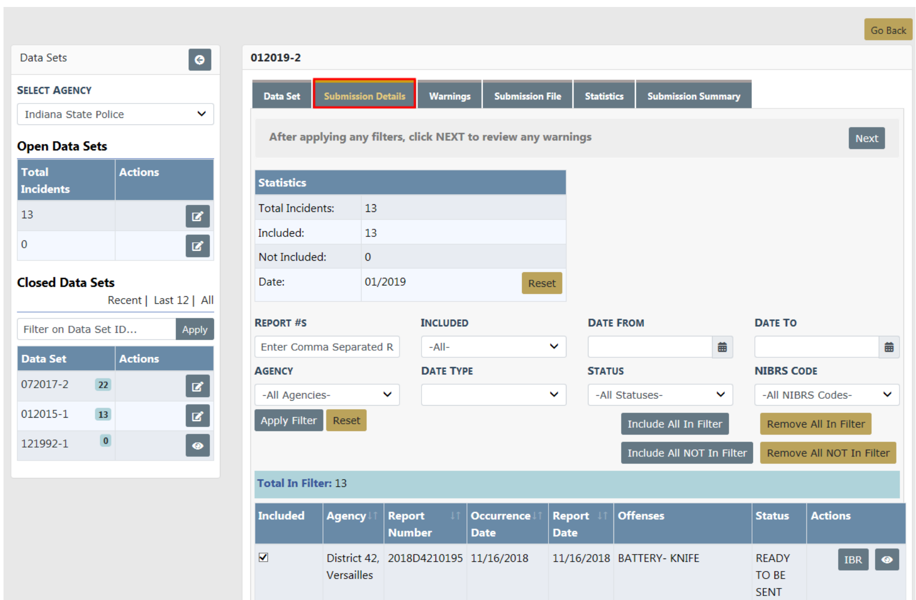
To perform this procedure it is necessary that a user have the role of **LEA_RECORDS_ MGMT** and/or the permission of **Incident Based Reporting**. The permission can be assigned to any role that the agency administrator would like. Please Contact Online RMS Support for assistance on any changes.

Filter

1. Enter the **Month** and **Year** of the reports that you want to report with this file. If you have not completed this action before you need to start at the Month and Year that you began using this application, then create Submission File by Month until you reach the present.

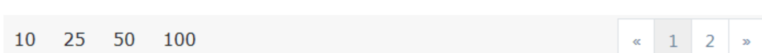


2. Click the **Next** button to filter the reports. The *Search Results* page will then display under the **Submission Details** tab. This may take a minute depending on the number of reports in the selected month.



Reports on Page Adjustment

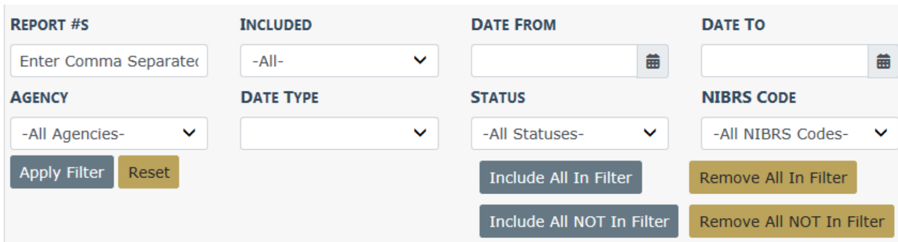
1. You can adjust the number of reports on each page by scrolling down. At the bottom left of the page you can select the number of reports you want to see on a page.



2. On the bottom right of the page the number of pages display based on your previous selection and the number of reports.

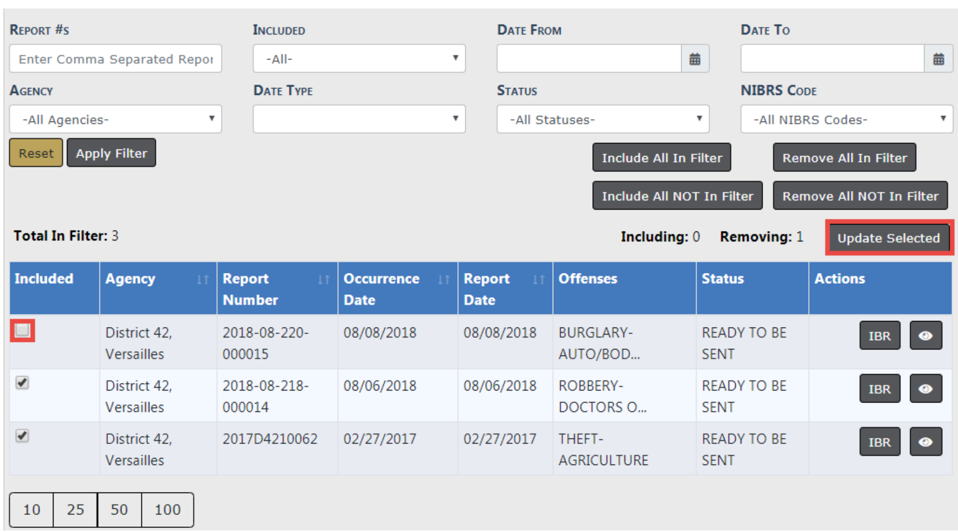
Additional Filters

1. If necessary you can enter criteria in the additional filter fields and **Apply Filter** to further define the reports you are reporting.



2. Unchecking individual reports.

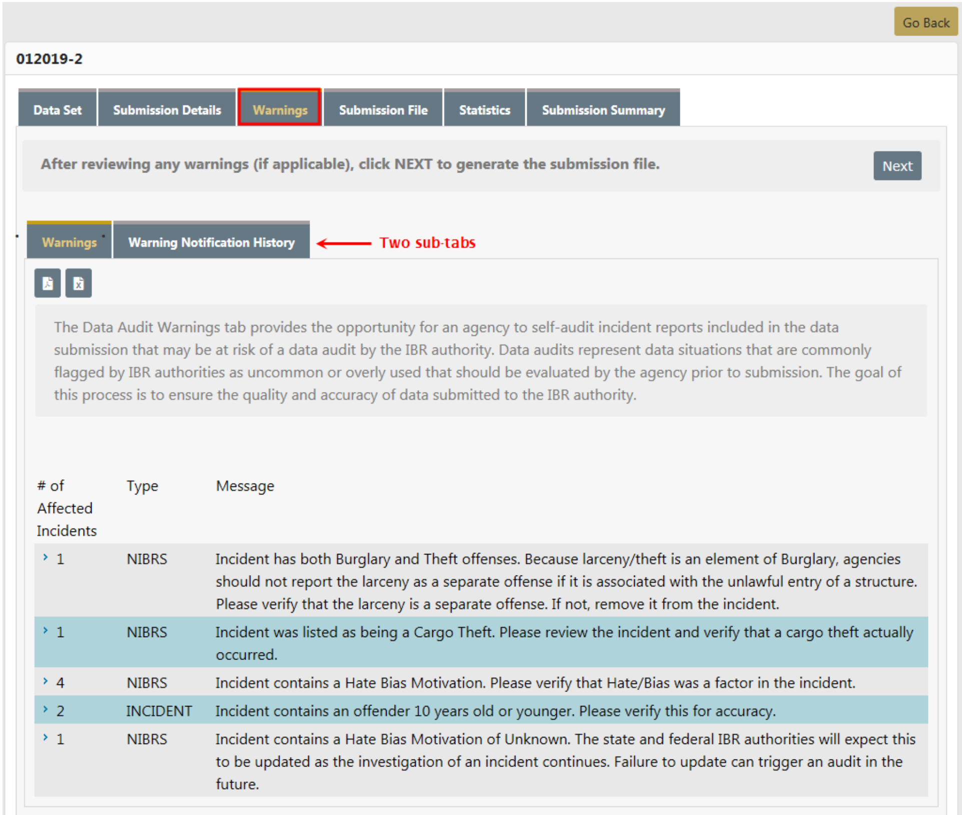
   a. If find reports you do not want to include, uncheck the checkbox in the *Included* column on the left side. An **Update Selected** button appears on the upper right once you uncheck a box. Click the **Update Selected** button.



3. Click the **Next** button to advance to the **Warning** tab.

Warnings

The Warning tab provides the opportunity to self-audit incident reports included in the data submission that may be at risk of a data audit by the IBR authority.



1. Review the warnings.

2. Click the **Next** button to advance to the **Submission File** tab.

Generate the Submission File

There are two types of submission files:

- Flat Files

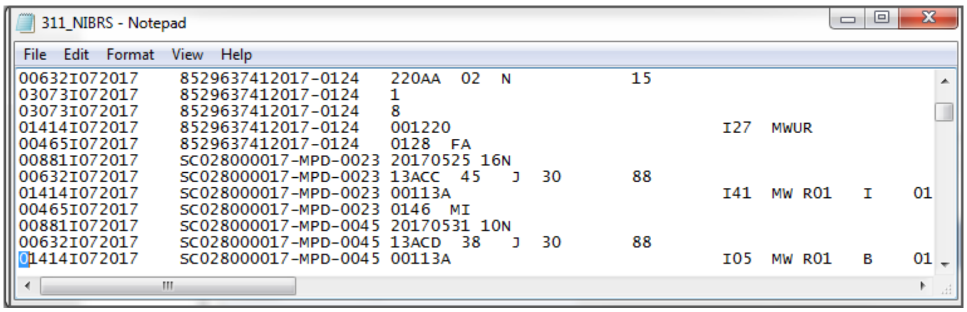
  A flat file contains data that is stored in plain text format, and there is one record per line. Columns are typically separated by a tab, comma, or another single value character; Online RMS creates flat files with tabs to separate the columns.

- XML Files

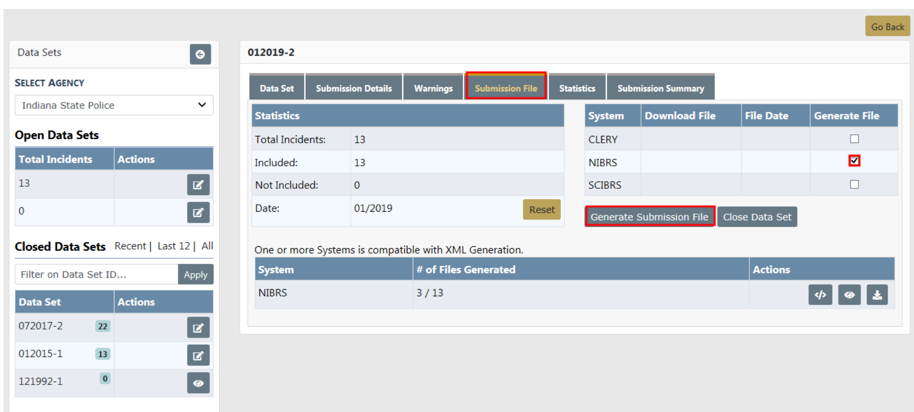
  An XML file is an XML (Extensible Markup Language) data file. They are plain text files that store information in a hierarchical standard format that is commonly used in data transfers. Unlike flat files, *custom tags* are used in XML files instead of *tabs* to define different columns of data.

Flat File

A flat file contains data that is stored in plain text format, and there is one record per line. Columns are typically separated by a tab, comma, or another single value character; Online RMS creates flat files with tabs to separate the columns.

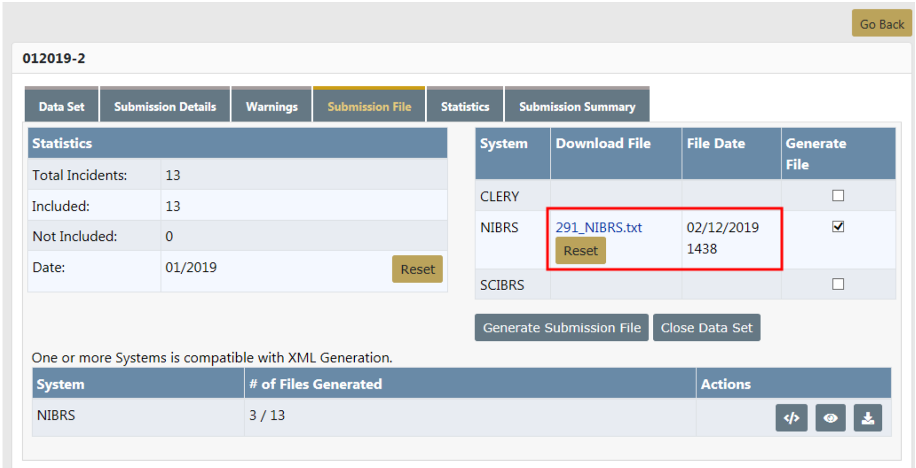


1. To generate the submission file you must first check the appropriate checkboxes in the *Generate File* column, then click the **Generate Submission File** button.

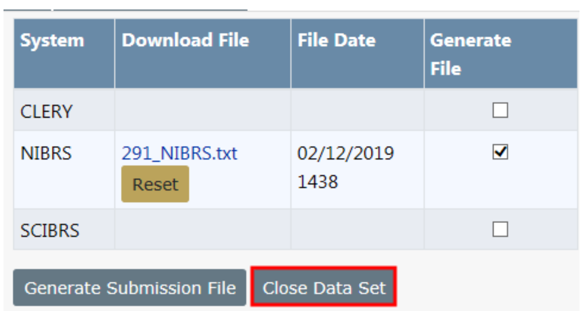


The **Generate Submission File** button and the section above the button appears only when flat file submission is an acceptable file format for your state.

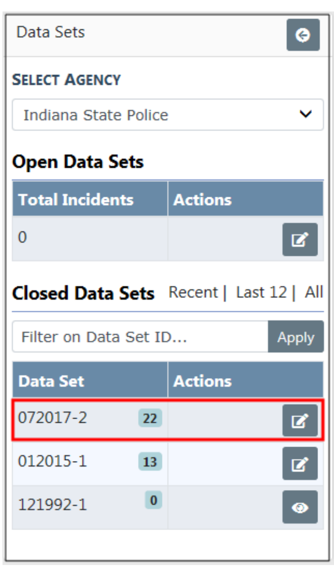
a. Depending on the number of files being included in this file, it may take a few minutes to generate the file. Once complete the **Download File** and **File Date** will fill in.



b. Agencies reporting by **Summary UCR Reports** will then click the **Close Data Set** button on the right side of the page. Note the number in the **Download File** name, as this will help you locate it later when running UCR Reports. You will also be able to locate the correct file as the Month and Year will be added next to the file name along with your ORI.



This will close the Data Set and place it in the *Closed Data Set* list on the left side of the page.



Note: With Online RMS 11.7.0 and above, the IBR submission process verifies if an incident with NIBRS data has been modified before including it with the data set for submission to the state. For more information, refer to the *Incident Based Reporting Guide - NIBRS* found under the Help Menu in Online RMS.

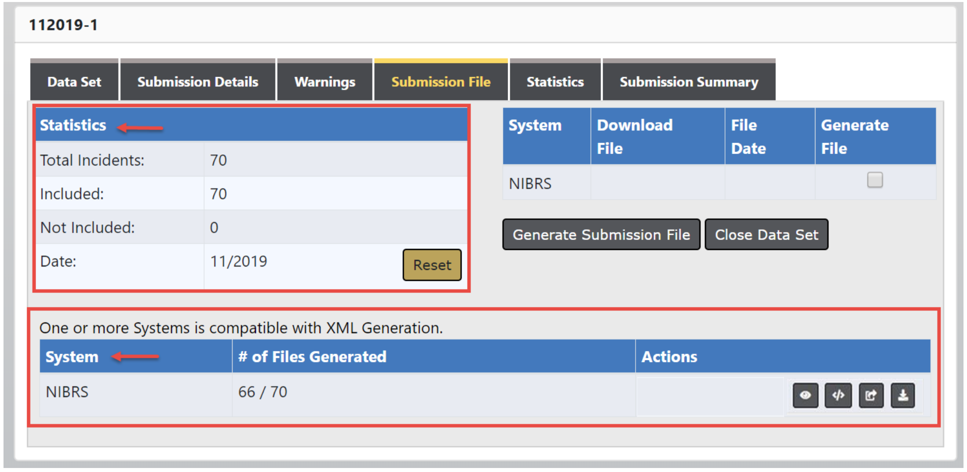
XML File

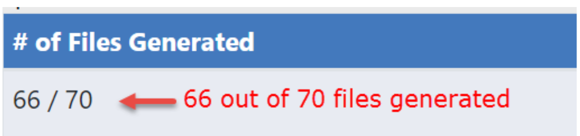
An XML file is an XML (Extensible Markup Language) data file. They are plain text files that store information in a hierarchical standard format that is commonly used in data transfers. Unlike flat files, *custom tags* are used in XML files instead of *tabs* to define data.


```
<?xml version="1.0" encoding="UTF-8"?>
- <nibrs:Submission xmlns:s="http://release.[redacted]"
  xmlns:nc="http://release.[redacted]"
  xmlns:j="http://release.[redacted]"
  xmlns:cjis="http://fbi.gov/[redacted]">
  - <cjis:MessageMetadata>
      <cjis:MessageDateTime>2019-12-19T12:21:42</cjis:MessageDateTime>
    - <cjis:MessageIdentification>
        <nc:IdentificationID>NC0[redacted]2019-0989</nc:IdentificationID>
      </cjis:MessageIdentification>
      <cjis:MessageImplementationVersion>4.2</cjis:MessageImplementationVersion>
    - <cjis:MessageSubmittingOrganization>
      - <j:OrganizationAugmentation>
        - <j:OrganizationORIIdentification>
            <nc:IdentificationID>NC0[redacted]</nc:IdentificationID>
          </j:OrganizationORIIdentification>
        </j:OrganizationAugmentation>
      </cjis:MessageSubmittingOrganization>
    </cjis:MessageMetadata>
  - <nibrs:Report>
    - <nibrs:ReportHeader>
        <nibrs:NIBRSReportCategoryCode>GROUP A INCIDENT
          REPORT</nibrs:NIBRSReportCategoryCode>
        <nibrs:ReportActionCategoryCode>R</nibrs:ReportActionCategoryCode>
      - <nibrs:ReportDate>
          <nc:YearMonthDate>2019-11</nc:YearMonthDate>
```


The **Statistics** section on the *Submission File* tab help you to identify how many reports were in the original query and how many you did not include.

The **System** type section is specific to your agency or State. NIBRS is the basic, and is used by all agencies that report by Summary UCR Reports, and agencies that report directly to the NIBRS Unit at the FBI.



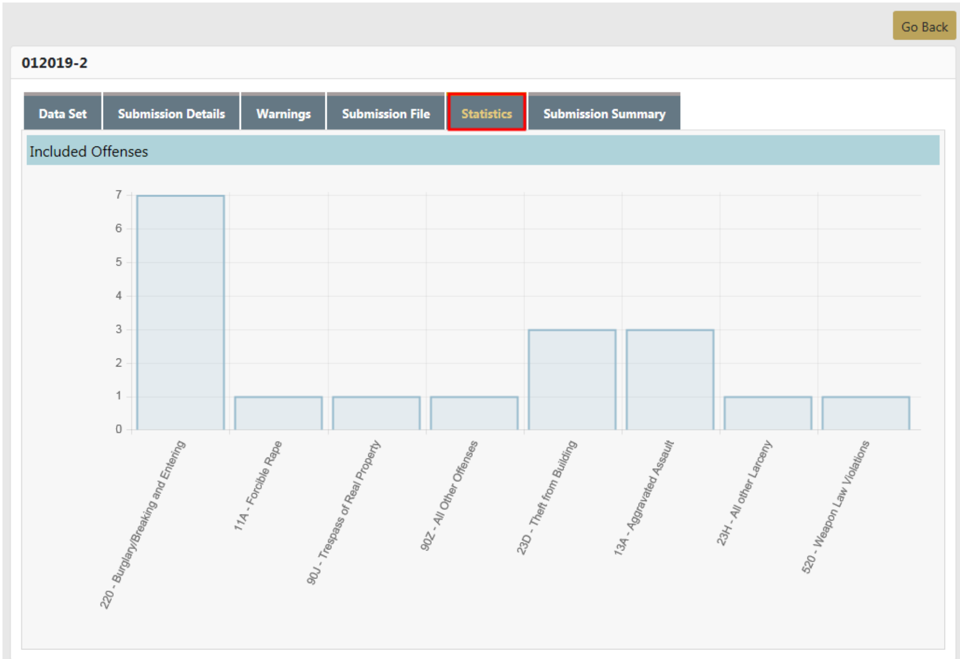


For more information on XML submission files, refer to the *Incident Based Reporting Guide - NIBRS* found under the Help Menu in Online RMS.

Statistics Report

The **Statistics** tab is to help you identify how many reports were in the original query and how many you did not include if you unchecked any reports. In the center is the **System** type that is specific to your agency and/or state. NIBRS is the basic and will be used by all agencies that report by **Summary UCR Reports** and those agencies reporting directly to the NIBRS Unit at the FBI.

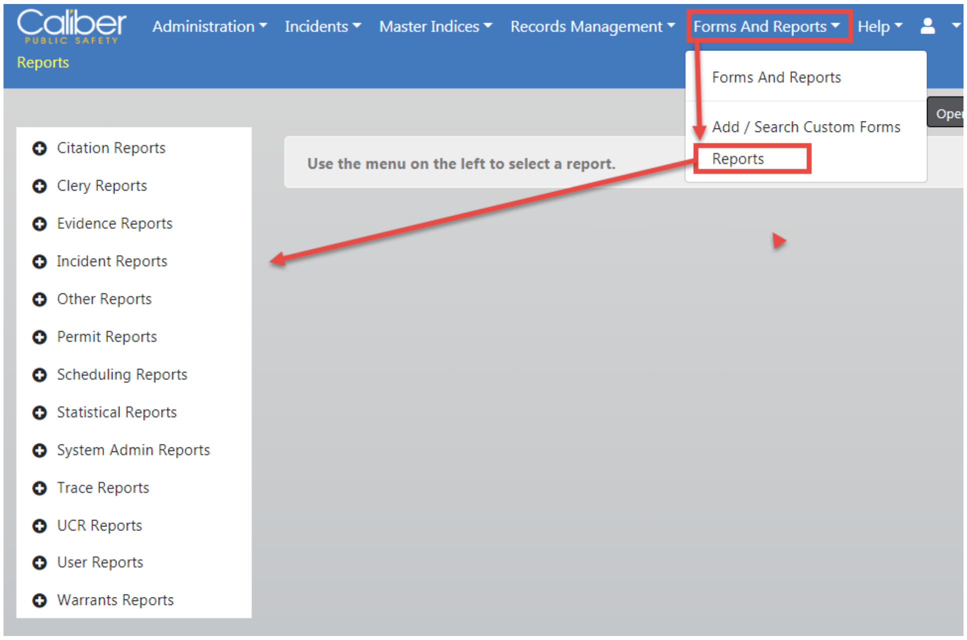
Note: While UCR functionality is still available within Online RMS, the FBI is no longer accepting UCR Summary Data as of Jan 1, 2021.



Run Summary UCR Reports

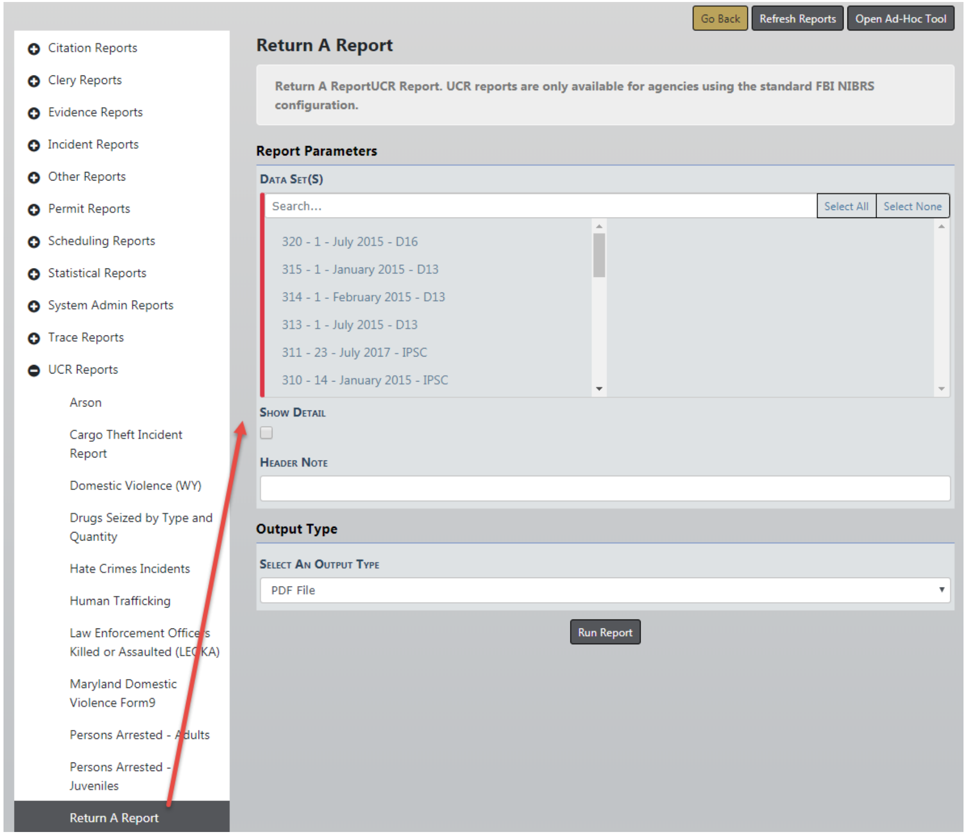
Note: While UCR functionality is still available within Online RMS, the FBI is no longer accepting UCR Summary Data as of Jan 1, 2021.

1. From your *Home* page click on the **Forms and Reports** tab at top of screen. Then click on **Reports**.



a. On the left is a list of *Report Category*, click on the **UCR Reports** category banner to display the UCR available reports in alphabetical order.

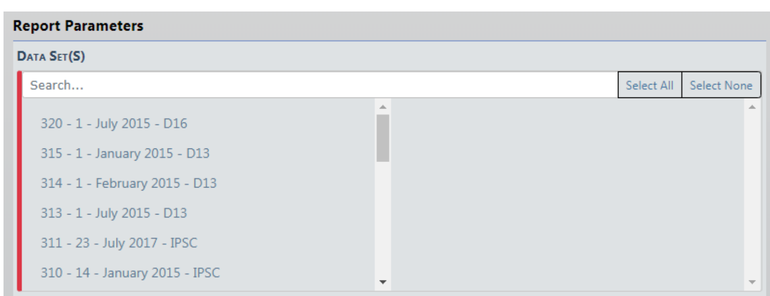
b. Click on the Report you wish to run, most likely the **Return A**. A filter opens on the right of the window.



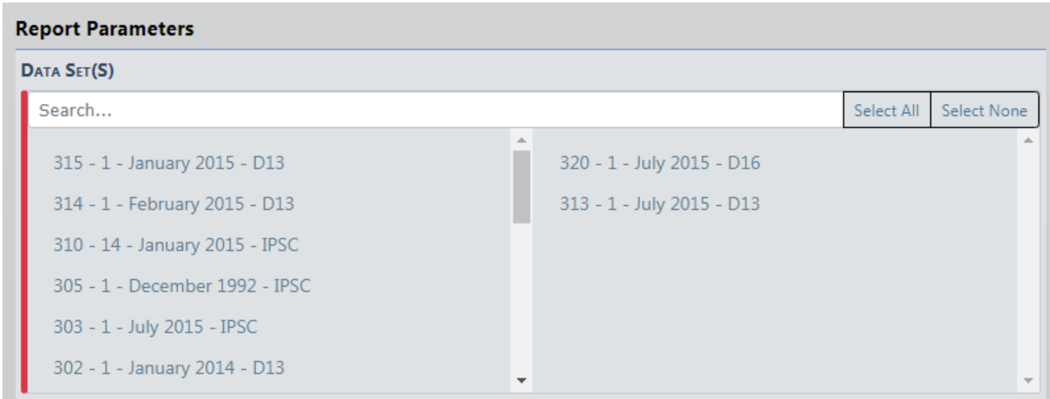
c. Click on the **Data Set** file or files you want to include. You can also enter search criteria to shorten the available list.

The format of the listed files:

291 - 13 - January 2019- IPSC (291 is the file number you created, 13 is the number of reports in the file and Month Year is based off the median date of those reports. And then of course your ORI#)



The selected parameters move from the left to the right window. To deselect a parameter, click on the parameter in the right window to move it back to the left.



d. If **Show Detail** button is selected, the report lists the report number that the returned data was from so that you can verify any information that does not appear to be accurate. The button turns green when selected, otherwise it remains gray.

e. It is recommended that you enter something into the **Header Help** field to help you identify the report that you are about to create, i.e. January 2019, December 2018, etc. Then click **Run File**.

Note: Creating the file may take several minutes to complete.

f. Once completed open the PDF file that was created then **Print** or **Save**. You will then need to enter this information into the Worksheet file that was provided by the UCR Unit of the FBI or report UCR data to your State Reporting Agency as they have specified.

Finalize Data Set

1. Once you have completed your **Reports** it is necessary that you **Finalize** the **Data Set** that you closed when making the file. Return to the *Incident Based Reporting* page. Find the Data Set that you closed under the *Closed Data Sets* list.

   For more information on accessing the *Incident Based Reporting* page, refer to " Over-view" on page G.

2. Click the **Edit** icon  under the *Actions* column next to that file. It asks you if any errors were reported. As Summary UCR Reporting Agency you do not get an error report, so click the **No** button.

   If errors were reported and you want an error report, click **Yes**. For more information, refer to "Errors Reported" on the facing page.

3. A warning displays stating this will set all Incidents to *Accepted* and *Finalized*. Click **Yes**.

4. The necessary actions on this **Data Set** are now complete.

Errors Reported

1. If errors are reported, click **Yes**.
2. A list of the reports appear. You can filter the list by entering one or more report numbers into the **Report#** field. Separate reports with a comma. Click **Apply Filter**.
3. Click the Apply Filter button as **Rejected**.
4. Click the **Update** button.
5. A message appears stating the action cannot be undone. Click **Yes** to continue or **No** to cancel.
6. You are returned to the report list to accept all the other reports.

Accepting Reports after Error Reports have marked Rejected

1. Once you have rejected the reports with errors you must mark all the other reports as accepted.
2. If your file has more than 50 or 100 records go to the bottom of the page and change the page count to 100, then return to the top of the list.
3. Click on the button **Apply Status to All on Page**.
4. Open this list and select **Accepted.**
5. Once selected it will mark all the radio buttons as **Accepted**, except the reports you rejected.
6. On the right side it will tell you how many reports on that page you will be updating to **Accepted** and the click the **Update** button. You will get the *This action cannot be undone* warning again.
7. If you have more than one page, navigate to the next page and repeat the marking as **Accepted**. You will have to change the **LOV** back to *Apply Status to All on Page* and then back to **Accepted** before the **Update** button will become available again. Continue this until you have marked all reports on all pages as accepted.
8. Once you have all the reports marked as either **Rejected** or **Accepted**, click on the **Accept and Finalize** button.
9. When the confirmation window appears, confirm you are sure.

Glossary

A list of definitions for terms and abbreviations associated with Caliber products follows. All terms included here are not necessarily found in the *Caliber Online RMS User Guide* or the *Caliber Online RMS Administrator Guide*.

9-1-1 or **911**– A three-digit telephone number used to report an emergency requiring response by a public safety agency (from *NENA Master Glossary of 9-1-1 Terminology*)

911 service area – The geographic area to which the government has granted authority to provide 911 service

911 system – A telephone system that automatically connects a person dialing "911" to an established PSAP through traditional telephone service facilities

abandoned call – A call placed to 911 in which the caller disconnects before the call can be answered by the PSAP attendant

access line – The connection between a customer premises network interface and the local carrier that provides access to the public switched telephone network

accident reports – Report category that enables sorting and viewing of accident query and accident state reports

active window – Indicated by a blue title bar, a window with which a user can interact

add-ons – Agency-defined field used to customize RMS for specific local needs,

AFIS – Automated Fingerprint Identification System (US FBI)

AFR – Abbreviation for *Automated Field Reporting*

alarm – Any notification made to an emergency agency that a situation exists or may exist and requires a response. An alarm can be generated via an electronic alarm system, telephone, radio, word-of-mouth, and so forth.

alert – A message, error, or notification of a situation (incoming calls, timer alerts, mail messages, and so forth) that may require immediate attention

ALI Database – Alternative name for DMS (Database Management System)

ALIDBS – Abbreviation for ALI Database

alias – A name, other than that recorded on an individual's birth certificate, by which the individual may be known

alternate routing – The routing of a 911 call or message over a designated substitute route when the primary 911 lines are unavailable for immediate use

Amber Alert – Broadcast system for *America's Missing: Broadcast Emergency Response*, Amber Alerts are immediate, up-to-date information to aid in the safe recovery of a missing child. Amber Alerts are dispatched to law enforcement, the media, and the public.

ANI/ALI – Abbreviation for *Automatic Name/Location Information/Identifier* or *Identification*

AOC – Abbreviation for *Authority Operation Center*

API – Abbreviation for application programming interface

Application – Generic term for a program or system that handles a specific business function

Application Programming Interface (API) – An interface used by programmers to write interfaces between their system and another vendor's system, thereby simultaneously integrating multiple systems

Application Software – A complete, self-contained program that can perform work for a user. This is in contrast to system software such as an operating system, server processes, and libraries that exist in support of application software.

AREA – Patrol Area/Zones/Beats

area of fire origin – The specific location where a fire started. May be a room, a portion of a room, a vehicle, a portion of a vehicle, or an open area devoted to a specific use. Every fire has an area of fire origin. (From NFIRS 5.0 Ref. Guide)

arrival time – The time at which a 911 call is received (if it generates an incident record) or at which an incident is created (if the call generates a manually-created incident)

arrived – Status of a unit indicating that it is assigned to respond to an incident and has arrived at the location specified on the incident record

assigned unit – A unit that is assigned (dispatched, en route, arrived, and so forth) to an incident. Some systems may be configured to consider units designated as busy (such as out for food, out for fuel, or at the station) as assigned.

Assigned Units Window – A CAD window that displays all units assigned to an incident. Some systems may be configured to consider units designated as busy (such as out for food, out for fuel, or at the station) as assigned.

Attendant Window – A CAD window that displays alerts to inform users of events or incidents that may require immediate attention

audit trail – Automated system records that show if database/fields have been changed, what changes were made, who made them, and when

automatic – When applied to fire protection devices, a device or system providing an emergency function without human intervention

automatic location identifier – Automatic PSAP display of a caller's telephone number, the phone location, and any additional emergency services information. If phone number is also included, it may be called ANI-ALI.

automatic number identification – Telephone number associated with the access line from which a 911 call originates

automatic vehicle locator – A product that allows a client to receive Global Positioning Satellite (GPS) coordinates, locating a client unit's position

available unit – A response unit not currently assigned to an incident

Available Units Window – A CAD/WebCAD window that displays all units (individuals, stations, and/or cars) not currently assigned to an incident. Some systems may be configured to consider units designated as busy (out for food, out for fuel, at the station, etc.) as assigned.

AVL – Abbreviation for *Automatic Vehicle Location*

B&E – Abbreviation for *breaking and entering*

bitmap – A picture representation that displays on the screen instead of text or numeric characters

BMP – File extension for bitmap, an image format commonly used on the web and in web applications

BOLO – Abbreviation for *Be on the Lookout*

building – A structure enclosed with walls and a roof and having a defined height (from NFIRS 5.0 Reference Guide)

busy – Status of a unit indicating that it is not assigned to an incident but is unavailable or may be slow to respond due to its current activities. Busy units include units that are out for food, out for service, at the station, and so forth. Some systems may be configured to consider units designated "busy" as assigned.

CAD – Abbreviation for *Computer Aided Dispatch*

call – An incident phoned into a police, fire, or EMS dispatch center

Call Detail Recording – Process of providing a written record, by telephone number, of all 911 calls received by a PSAP

Call Number Sequence – Sequence numbers in CAD to track and record CAD calls

Call Relay Method – Process by which a 911 call is answered at the PSAP and the call taker relays the information to the appropriate public or private safety agency for further action

Call Taker – The person in an agency that receives a call for an incident. This person may or may not be a dispatcher.

CFS – Abbreviation for *calls for service*

Caliber CAD – Caliber's CAD Solution

Call Transfer Method – Process by which the PSAP call taker determines the appropriate responding agency and transfers the 911 caller to that agency

casualty (fire) – A person who is injured or killed at the scene of a fire (from NFIRS 5.0 Reference Guide)

CATP – Abbreviation for *customer acceptance test plan*

charge – An accusation of wrongdoing, particularly an official statement that accuses someone of committing a crime

check box – An interface icon that when clicked turns an option *on (checked)* or *off (empty)*. When two or more checkboxes are offered as selections, the user may check as many choices as are applicable (unlike radio button selections, where the user can only select one option).

CID – Abbreviation for *Criminal Investigation Division*

CIR – Abbreviation for *Criminal Incident Report*

citation – A writ or ticket for a person to appear in court on a specific date to respond to a charge of breaking the law

citation reports – Report category that enables sorting and viewing the following report types: Charges by Person, Court Schedule, Ticket Inventory, and Officer Activity

civil process reports – Report category that enables sorting and viewing the following report types: Civil Process by Sector, Court Schedule, Payments Received, and Papers by IV-D

civilian fire casualty – Any non-fire service casualty who is injured or killed at the scene of a fire (from NFIRS 5.0 Reference Guide)

CIS – Abbreviation for *Criminal Information System*, a Caliber state switch interface product. CIS has also been referred to as *Javelin*. No product queries NCIC directly. NCIC queries are a result of a properly formatted query to a state switch.

CJIS – Abbreviation for *Criminal Justice Information System*

class – A type (Fire, Law, EMS) of incident or a type of responder

class group – The unit associated with an incident. The class group is a subset of the class.

CLR – Abbreviation for *clear*, a status code

COC – Abbreviation for *Chain of Custody*

combustible – A material that will release heat energy on burning (from NFIRS 5.0 Reference Guide)

complaint type – Complaint types convey more than just a description of the complaint. Each type has an associated priority, class, ten code, and responding departments. Your agency should determine the information for each complaint type and enter them into the system.

Computer Aided Dispatch (CAD) – Electronic dispatching system used to manage an agency's communications center

computer hardware – Devices capable of accepting and storing computer data, executing a system sequence of operations on computer data, or producing control outputs, including the computer, monitor, keyboard, printer, cabling, and other peripherals.

Computer Telephony Integration – Also called computer-telephone integration or CTI, is a common name for any technology that allows interactions on a telephone and a computer to be integrated or coordinated. The term is predominantly used to describe desktop-based interaction for helping users be more efficient, though it can also refer to server-based functionality such as automatic call routing.

configuration – The functional and/or physical characteristics and interrelationships of project hardware and software

COTS – Abbreviation for *Commercial off the Shelf*

Criminal Justice Information System – A division of the FBI that has the mission of reducing terrorist and criminal activities by maximizing the ability to provide timely and relevant criminal justice information to the FBI and to qualified law enforcement, criminal justice, civilian, academic, employment, and licensing agencies concerning individuals, stolen property, criminal organizations and activities, and other law enforcement related data. Each state has its own CJIS division. (*from CJIS Web site mission statement*)

CS – Abbreviation for *CAD Station*

CTI – Abbreviation for *Computer Telephony Integration*

daily files – Daily records update file received by PSAPs from telephone companies. Contains any changes made to subscribers, subscriber phone numbers, or subscriber addresses.

data – Numbers, text, graphics, images, and sound stored in a form that can be used by a computer

data integration server – An XML-based communications server that allows almost instant integration and use of any new data source

DBF – File extension for Data Base File, the dBase file format, used with SHP (see SHP)

data-sharing software – Systems such as NCIC Client that enable information to be sent and received from a single workstation to other workstations, databases and agencies elsewhere

default routing – The capability to route a 911 call to a designated (default) PSAP when the incoming call cannot be selectively routed due to ANI failure or other causes

DEM – Abbreviation for *Digital Elevation Model*

department – A specific segment of a responding agency, such as any city police department, any county sheriff, and any fire district department

design – Tasks associated with specifying and sketching the features and functions of a new application prior to coding

DGN – File extension - DesiGN file, the Microstation drawing format

DIG – Abbreviation for *Digital Information Gateway*

DIS – Abbreviation for *Data Integration Server*

dispatch center –The location from which a public or private safety agency's mobile units are dispatched.

dispatch time – Present duration (in minutes) in which the user must dispatch a unit to an incident before a supervisor receives an alert indicating that the incident is awaiting assignment

dispatched – Status of a unit that is assigned to respond to an incident

dispatcher – The person in an agency that enters a call for an incident into the CAD system. This person may or may not be a call taker.

disposition – The final outcome of a CAD incident

dissemination – Information concerning property or court dockets that is released to individuals involved in the case

DMV – Abbreviation for *Department of Motor Vehicles*

DNR – Abbreviation for *Department of Natural Resources*

DOB – Abbreviation for *Date of Birth*

DOT – Abbreviation for *Department of Transportation*

DRG – Abbreviation for *Digital Raster Graphic*

drop-down selection menu – A list of selections that displays when a down arrow on an input field is clicked

DSP – Abbreviation for *Dispatch*, a status code

DWG – File extension - DraWinG file, the AutoCad drawing format

DXF – File extension - Drawing eXchange Format, an AutoCad export file

E 911 (enhanced 911) – An emergency telephone system that includes network switching, database and CPE elements that can provide selective routing, selective transfer, fixed transfer, Automatic Location Identification (ALI), and Automatic Number Identification (ANI)

elapsed time – The duration since the previous contact time. Once a unit is assigned, the elapsed time indicates the time that has passed since the AGN STAT time.

EMD – Abbreviation for *Emergency Medical Dispatch*

emergency call – A telephone request for service which requires immediate action to prevent loss of life, reduce bodily injury, prevent or reduce loss of property, and other emergency situations as defined by local policy

Emergency Medical Dispatch – Critical medical advice offered by specially trained 911 call answering personnel. Advice follows approved protocols, given in logical sequence, for such conditions as heart attacks, choking, and child birth. Protocols are administered by phone until the arrival of emergency medical personnel on the scene.

Emergency Service Number – A three- to five-digit number that represents a unique combination of emergency services agencies (Law, Fire, EMS) designated to serve a specific range of locations within a geographical area. ESNs are set up by the telephone company in conjunction with subscriber input and transmitted along with E911 data. ESNs are not always available in the E911 ALI feed.

Emergency Service Zone – A geographical territory consisting of a specific combination of law enforcement, fire, and EMS coverage areas

EMS – Abbreviation for *Emergency Medical Service*

EMS Zone – Also called *Run Zone*, a specific area by which EMS responsibilities are defined

En Route – Status of a unit indicating that it is assigned to respond to an incident and is proceeding to the location specified on the incident record

ENR – Abbreviation for *Enroute*, a status code

environment – The set of tools and the physical surroundings in which software is developed, tested, and/or deployed

ESN – Abbreviation for emergency service number

ESRI – Abbreviation for Environmental Systems Research Institute (3rd party supplier of GIS and database software)

evacuation route – A route for a specific geographic area that dispatchers can use to instruct citizens in case of an evacuation

event code – Unique alphanumeric code that identifies the circumstance or occurrence that resulted in a call for help. Event codes may differ from one agency to another and are established by your agency administrator.

exposure – A fire incident that results from a single igniting event. For record-keeping purposes, the initial fire incident(primary ignition event) is "Exposure 1" and each subsequent fire resulting from that initial exposure is sequentially numbered.

exposure – (fire) A fire in a building, structure, vehicle, or outside property resulting from a fire outside that building, structure, vehicle or outside property (from NFIRS 5.0 Reference Guide)

expungement – Permanently deletes chosen records from the RMS tables; there is no audit trail or logging of this activity.

Extensible Markup Language – (XML) A markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable. It is a highly compressible, standard markup language that defines a way of transmitting and representing data used for applications and the internet.

fatality – An injury that is fatal or becomes fatal within one year of the incident (from NFIRS 5.0 Reference Guide)

FDID – (Fire Department ID) A unique, five-character identifier assigned by the state to identify a particular fire department within that state (From NFIRS 5.0 Reference Guide)

field – An area on the screen into which you can enter information into a system

Field Reporting – Caliber applications used for wireless (via Mobile) reporting of various documents, such as incident reports, traffic tickets, and accident reports. Also functions as a stand-alone that can be accessed via a LAN workstation or notebook computer. All information entered into a report is reviewed by a supervisor and fed into a database.

fire casualty – A person working for an fire department who is injured or killed at the scene of a fire (From NFIRS 5.0 Reference Guide)

fire fatality – An injury that is fatal or becomes fatal within one year of a fire incident (From NFIRS 5.0 Reference Guide)

fire plan database – The fire plan database contains detailed information about a specific site for use in a fire of other emergencies. This information will help your agency respond quickly and efficiently to situations that are dangerous or have the potential to become dangerous. Using a fire plan, you can create and store address-specific information that includes data crucial to those responding to a fire.

fire (run) zone – A specific area by which fire responsibilities are defined.

footprint – A specific geographical area covered by a wireless cell or cell sector

function key (**F** key) – The computer keys labeled **F1** through **F12**, some of which may be assigned special functions (For example, **F8** is usually reserved for the *Exit* function in Caliber products.)

gcpk – file extension - geocoding package used for location calculations

geocoding – GIS operation to locate geographic coordinates associated with an address or point on map

geoprocessing – GIS operation to manipulate spatial data, including geocoding, searching, and routing

GIS – Abbreviation for *Geographical Information System*

Global Positioning System – (GPS) A space-based satellite navigation system that provides location and time information in all weather conditions, anywhere on or near the Earth where there is an unobstructed line of sight to four or more GPS satellites. The system provides critical capabilities to military, civil and commercial users around the world. Maintained by the United States government, it is freely accessible to anyone with a GPS receiver.

gpk – file extension - geocoding package used for route determination

GPM – Gallons per minute

GPS – Abbreviation for *Global Positioning System*

GPS Tracker – GPS/AVL tracking software

group – 1. (CAD) The unit associated with the same specific incident. The class group is a subset of the Class field. 2. (ENS) A list of call recipients that belong to the same area or community.

GUI – Abbreviation for *Graphical User Interface*

hardware – Physical equipment used to process, store, or transmit computer program data

hazardous materials – Any material that is an air-reactive material, flammable or combustible liquid, flammable gas, corrosive material, explosive material, organic peroxide, oxidizing material, radioactive material, toxic material, unstable material, or water reactive material; and any substance or mixture of substances that is an irritant or a strong sensitizer or that generates pressure through exposure to heat, decomposition, or other means. (From NFIRS 5.0 Ref. Guide)

hazmat – Abbreviation for *Hazardous Materials*

high cross street – A term used to indicate the next street that intersects a particular street in the direction in which that street's numbers ascend

hot sync – Using a third party device manager application, this allows the import and export of applications, files and data between computer servers and a desktop or laptop computer.

html – Abbreviation for *Hyper Text Markup Language*

hypertext – Text that is displayed electronically and contains links

iamap – File extention - Caliber map project file

icon – On a Windows interface, an image or button containing an image that represents various system functions

in service – Status of a response unit indicating that it is available for assignment. Often referred to as *On Duty*.

inactive window – Indicated by a gray title bar, a disabled window with which a user cannot interact because another window is selected

incident – An event that results in a call for help. CAD assigns an incident number to every call for help so that the call can be assigned to units as necessary. Incident records include details of the initial information given by the caller as well as details of every action the organization takes as a result of the call.

incident number – A unique, sequential number assigned to a specific incident record

Incident Wizard – An RMS feature that allows users to configure the system so that the appropriate screens automatically display upon creation of an incident record. This feature helps to ensure that all relevant known incident data is entered into RMS

interface – A connection between two devices or systems

ISSI – Abbreviation for *Individual Short Subscriber Identity*

ISPS – Abbreviation for *Caliber Safety Portal System*

issue – A problem to be solved or a decision that has not been made

JMS – Abbreviation for *Jail Management System*

JPG (jay-peg) – Abbreviation for the file extension *Joint Photographic Experts Group* which is an image format commonly used on the Web

jurisdiction – An overall area of responsibility. An installation could provide service for one or more jurisdictions. For example, an installation could be responsible for just one small county so it would need only one jurisdiction. Another installation could provide service for the county and the major city within that county. This installation could use two jurisdictions, one for the county, and one for the city.

LAN – Abbreviation for *Local Area Network*

latitude – The angular distance north or south of the earth's equator, measured in degrees along a meridian, as on a map or globe. Latitude lines run parallel to the equator. Values range from 0 degrees at the equator to 90 degrees at the North and South Poles. Minutes and seconds range from 0 to 59. (From *NFIRS 5.0 Ref. Guide*)

layer – Map (GIS) data layer that can be portrayed in map legend as an individual feature

LEO – Abbreviation for *Law Enforcement Officer*

LINK – Abbreviation for *Law Information Network of Kentucky*

link – Text that when clicked takes you to another page, topic, site, and so forth. Also called hyperlinks, links are typically underlined and of a different color than the surrounding text. An image can also be used as a link.

literal – A term used to refer to generic field names, or labels, for user-defined fields. Some RMS and JMS modules allow users to set up agency-specific fields. These fields must be assigned names (labels). Thus, a literal is a name/label that an agency assigns to a field.

local area network – A computer network that encompasses a discrete area, such as in a building. In a law enforcement agency, this may include Dispatch, CAD, GEO, MIS, and desktop computers.

location – The address at which an incident is occurring as provided by the ALI system or the caller

login – A process in which a user identifies and authenticates himself/ herself to a computer

longitude – Angular distance on the earth's surface, measured east or west from the prime meridian to the meridian passing through a position, expressed in degrees (or hours), minutes, and seconds. Longitude lines run north/south, are parallel at the equator, and converge at the North and South Poles. Values range from 0 at Greenwich, England, to 180 degrees at the International Date Line west of Hawaii. Minutes and seconds range from 0 to 59. (*From NFIRS 5.0 Ref. Guide*)

low cross street – A term used to indicate the next street that intersects a particular street in the direction in which that street's numbers descend

Maps – Map display of GIS data (raster and vector)

marker – Map icon/symbol used to display specific data (search results, incident, or unit location)

Master Street Address Guide (*MSAG*) – Computerized geographical file or database that consists of all streets and address ranges within the 9-1-1 system area. Key to selective routing capability of E911 systems; requires constant updating.

MDT – Abbreviation for *Mobile Data Terminal*

MM – Abbreviation for *Mile Marker*

MNI – Abbreviation for *Master Name Index*

MO – Abbreviation for *Method of Operation*

mobile property type – Property designed to be movable whether or not it still is (from NFIRS 5.0 Reference Guide)

move-ups – Move-Ups provide dispatchers with information when handling various types of calls, such as EMS. For example: When a dispatcher requests to view EMS move-ups, the system checks this database to see if the current situation matches any situations in the database. If a match is found, the instructions are displayed to the dispatcher. These instructions can indicate what station should move up a unit to provide back-up coverage. They should also include whatever information your agency normally expects a dispatcher to have access to when dealing with a particular EMS situation.

mpk – File extension - ESRI map package file, vector map graphic data

MSAG – Abbreviation for *Master Street Address Guide*

Narrative – Additional description or details, in free-form text, associated with an incident

National Crime Information Computer – NCIC is a computerized index of criminal justice information that is available to Federal, state, and local law enforcement and other criminal justice agencies, and it is operational 24 hours a day, 365 days a year. The NCIC system provides a computerized database for ready access by a criminal justice agency making an inquiry and for prompt disclosure of information in the system from other criminal justice agencies about crimes and criminals. This information assists authorized agencies in criminal justice and related law enforcement objectives, such as apprehending fugitives, locating missing persons, locating and returning stolen property, as well as in the protection of the law enforcement officers encountering the individuals described in the system.

National Emergency Number Association – NENA's mission it is to foster the technological advancement, availability, and implementation of a universal emergency telephone number system in the United States. In carrying out its mission, NENA promotes research, planning, training and education. The protection of human life, the preservation of property and the maintenance of general community security are among NENA's objectives.

National Institute of Corrections – The National Institute of Corrections (NIC) is an agency of the United States government. It is part of the United States Department of Justice, Federal Bureau of Prisons. NIC provides support programs to assist federal, state, and local corrections agencies and provides funds to support programs that are in line with its key initiatives.

National Law Enforcement Telecommunication System – NLETS is the International Justice and Public Safety Information Sharing Network – a state-of-the-art secure information sharing system for state and local law enforcement agencies. It provides electronic messaging to allow information exchange between state, local, and federal agencies and support services to justice-related computer programs.

NCIC – Abbreviation for *National Crime Information Computer*, located in Washington, D.C.

NENA – Abbreviation for *National Emergency Number Association*

NFIRS – Abbreviation for *National Fire Incident Reporting System*

NIC – Abbreviation for *National Institute of Corrections*

NLETS – Abbreviation for *International Justice and Public Safety Network* formerly known as *National Law Enforcement Telecommunication System* (https://www.nlets.org)

NOK – Abbreviation for *Next of Kin*

Objective Jail Classification System – developed guidelines for assessing jail inmates' individual custody and program needs

OCA – Abbreviation for *Originating Case Agency*

OCC Number – The number of occupants at a location

occupancy – The specific property use of a building or portion of a building

Off Duty – See *Out of Service*

officer reports – Report category that allows access and viewing of Associated Papers and Case Assignment Records

OJC – Abbreviation for *Objective Jail Classification*

OMS – Abbreviation for *Offender Management System* which is replacing JMS

On Duty – See “in service”

on-site materials – Any significant amounts of commercial, industrial, energy, or agricultural products or materials on the property, whether or not they became involved in the fire. Note: For more information, refer to the NFIRS 5.0 Complete Reference Guide, available from www.fema.gov/nfirs.

ORI – Abbreviation for *Originating Agency Identifier*, a nine-digit code used by agencies on the law enforcement network

Originating Case Agency – A term used in RMS Case Management to refer to the first agency to respond to and/or create a report about an incident

ORION – Abbreviation for *Originating Agency Identifier On-line Directory*

OS – Abbreviation for *On Scene*, a status code

out of service – Status of a unit indicating that it is not assigned to an incident but is unavailable for assignment, often referred to as Off Duty

PACE – Abbreviation for *Pro-Active Criminal Enforcement*

patrol area – Geographical area of a jurisdiction that a unit works

PCB – Abbreviation for *product change bulletin*

PCN – Abbreviation for *product change notice*

PCS – Abbreviation for *Public Communications Supervisor*

pending call – A call to which no units have been assigned

person history reports – Report category that enable sorting and viewing of the following report types: Person Involvement, Crimes by Person, Gender and Race Profile, Arrest History Summary, Civil and Warrants by Defendant, Civil and Warrants by Plaintiff, and Sex Offender Registration

phases – The divisions of a software development life cycle into discrete stages (requirements, design, code, test, and so forth)

pictometry – Aerial image capture and display, orthogonal and oblique images (3rd party)

place alias – A common name for a business, landmark, or general location that a caller may use to identify a place when unsure of the exact location

place file – Function that cross-references a place (alias) name with a location record.

png – File extension - Portable Network Graphics which is a commonly used image format

pod – Used in JMS/OMS, this term is equivalent to cell block

POI – Abbreviation for *Point of Interest*

pop-up – A window that opens "pops up" when an option is selected or a function key is pressed. A pop-up window usually contains a menu of commands and stays on the screen only until a command is selected.

priority – Level of importance assigned to an incident. CAD includes the following priorities: Priority 1 - Emergency. Priority 2 - Important, but not an emergency. Priority 3 - Less important; not an emergency.

probation – An alternative to prison/jail in which offenders can remain in the community under court supervision

process – The step-by-step sequence of activities (systematic approach) that must be carried out to complete a project

Product Change Bulletin – A document summarizing changes (such as fixes, enhancements, and usability improvements) to a product since the last major release (for example, 10.1 to 10.2)

Product Change Notice – A document summarizing changes (such as fixes, enhancements, and usability improvements) to a product since the last minor release (for example, 10.1.1 to 10.1.2)

property – An item of value that can be FIXED on the Earth's surface, i.e., water, land, roadways, structures, buildings, or MOBILE, i.e., ships, airplanes, trains, trucks, automobiles (from NFIRS 5.0 Reference Guide)

proximity distance – Relative distance that determines when the symbols for two or more AVL units merge together to show up as one symbol on the GIS map

PSAP – Abbreviation for *Public Safety Answering Point*

Public Safety Answering Point – The initial answering location of a 911 call. Sometimes called a 911 center.

Quality Assurance – The process of tracking and oversight functions for monitoring project performance, adherence to commitments, and budget requirements

radio button – Interface icon with a round button shape that can be clicked to indicate a choice. A radio button operates like the buttons on a radio tuner, when a button is pressed, all other buttons are disengaged, allowing only one selection at a time.

Records Management System – Also known as RMS, a centralized electronic package of modules used to enter, maintain, track and manage data related to criminal incidents, evidence, cases, and so forth

remark – A comment or note that may be appended to a unit's log or sent to a unit's pager as an alphanumeric text message

responding unit – The unit currently assigned to respond to an incident

response – Deployment of an emergency service resource to an incident (from the NFIRS 5.0 Reference Guide)

rich text format – generic word processing format

RL – Abbreviation for *Radio Log*

RMS – Abbreviation for *Records Management System*

route – GIS function used to determine route/directions from one point on a map to another

RTF – Abbreviation for *rich text format*, a file extension

run cards – Run cards are sets of instructions for dispatchers to follow based on given situations. Each run card contains one set of instructions.

run number – A chronological value assigned to a recorded incident. Also called *OCA number* or *case number*.

SBN – A file extension used by files that store the spatial index of the features used by Maps

SBX – A file extension used by files that store the spatial index of the features used by Maps

SDE – Abbreviation for *Spatial Database Engine*

SDTS – Abbreviation for *Spatial Data Transfer Standard*

scope – The magnitude of the effort required to complete a project

sealing – A means to flag records as sealed. This activity produces no audit trail nor is it logged. Typically, general users do not have access to sealed records, but with appropriate permissions set up in File Maintenance, a user may be allowed access.

search reports – A report category that can be used to sort vehicle, charge, person, and property records

sequence number – Number identifying a row in the System Monitor table. Clicking on the sequence number displays the incident details. The sequence number is not permanently associated with the incident record displayed in the row. In other words, an incident may be moved to another row and consequently associated with another sequence number as incidents are added to or removed from the table.

session time out – Inactive status of an application that occurs when a page is left open and untouched for a customer defined / configured duration (example: 30 minutes). The User Login page displays at session time out, prompting the user to log in again.

sid – File extension - MrSid georeferenced raster graphic file, aerial imagry map data

SME – Abbreviation for *Subject Matter Expert*

Spatial Database Engine – Helps manage spatial data to provide a quicker retrieval of that data from database engines such as Oracle, SQLSever, and Informix

Spatial Data Transfer Standard – A standard used to describe earth-referenced spatial data. It was designed to easily transfer and use spatial data on different computer platforms.

SOD – Abbreviation for *Special Operations Division*

solvability factors – Factors that influence whether crimes are more or less likely to be solved. Agencies assign relative weights to these factors. These weights are then used to assess the solvability of a case to determine assignment of investigative resources.

soundex – A coded name index based on the way a word sounds rather than the way it is spelled. Names that sound the same, but are spelled differently, like SMITH and SMYTH have the same code and are filed together. The soundex coding system allows you to find a surname even though it may have been recorded under various spellings.

SOP – Abbreviation for *Standard Operating Procedures*

SQL – Structured Query Language

SSM – System Status Monitor

specifications – General term for the wide variety of paper-based descriptions of a program or system

stacking – This allows a user to hold/stack an incident for a certain unit. Example: If a unit is on an incident and a second incident is created in that unit's zone/beat, the user can hold-/stack the second incident until the unit clears the first incident.

station – A particular fire station within a fire department. If used, station IDs are assigned locally.

teleco – Abbreviation for *telephone company*

telecommunicator – The person in an agency that monitors phone activity and talks with the callers dialing 911. This person may or may not be a dispatcher.

testing – The set of defect removal tasks that include execution of all, or part, of an application on a computer

TMD – Abbreviation for Tactical Map Display

tpk – File extension - ESRI tile package file, raster map graphic data

TS – Abbreviation for *Traffic Stop*

UCR – Abbreviation for *Uniform Crime Reporting*

UID – Abbreviation for *Unit ID*

Uniform Crime Reporting – A collective effort on the part of city, county, state, tribal, and federal law enforcement agencies to present a nationwide view of crime. Agencies throughout the country participating in the UCR program provide summarized reports on offenses known to law enforcement and reports on persons arrested. (From the *Introduction of the U.S. Department of Justice's [FBI] Uniform Crime Reporting Handbook - 2004*)

Uniform Crime Reports (*UCR*) – An FBI program that collects and disseminates data on arrests and crimes

unit – An entity dispatched using a single code. A unit might be one officer, a patrol car, an EMS station, or even a fire station.

use of force – A classification of an incident, indicating that use of force was required

vacant – Not occupied or put to use; with no furnishings or equipment present

validation – Process that ensures that the entered data is correct

VIN – Abbreviation for *Vehicle Identification Number*

VINE – Victim Information and Notification Everyday. VINE is a system that allows crime victims across the U.S. to obtain up-to-date information about criminal cases and the custody status of offenders at any time over the telephone, through the Web, or by e-mail.

warrant – A judicial writ authorizing an officer to make a search, seizure, or arrest, or to execute a judgment

warrant reports – A report category of that enables sorting and viewing of the following types of reports: Warrants Served by Officer, Warrants to Expire, Served by Officer/Date Range, Status Snapshot by Date Range, Warrants by Dept/Status, Warrants by Process Dept, and City/County Warrant Report

wildcard character – A character, usually an asterisk, that is used to take the place of other unknown characters to perform searches. For example, to search for a person with the name *Jansen* or *Jensen* you would use “j*nsen” to find all occurrences of both.

wildcard search – The Master Vehicle Index (MVI) and Master Name Index (MNI) modules allow for wildcard searches to broaden search terms and find information. In RMS, the wildcard symbol is an asterisk (*). This symbol is used to search the indices for possible matches to, or hits on, data entries.

wildland – An unsettled, uncultivated region or minimal to no development, covered with timber, woodland, brush, or grass. (From NFIRS 5.0 Ref. Guide)

window – A section of a screen that contains an application or part of an application

wrecker – A vehicle that is used in recovering or removing a wreck, especially a truck with a hoist and towing apparatus used in towing disabled or wrecked vehicles

XML – File extension and Abbreviation for *Extensible Markup Language*. XML is a highly compressible, standard generalized markup language to define a way of transmitting and representing data. Designed to transmit data used for applications and the internet.

zone – An area to which dispatchers are assigned to dispatch responsibilities; may include an entire city or county or only certain regions, depending on zoning, which is based on the agency's call activity and the agency size

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