Perspective™

by PPM

USER'S GUIDE

Perspective by PPM™

Version 4.5

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Contents

Welcome to Perspective by PPM 2000

Welcome to Perspective by PPM 2000™, the industry leader in Incident Reporting and Investigation Management software. Perspective by PPM is an end-to-end Incident Management solution that covers everything from response and documentation, through to investigation, and analysis. You can intelligently action and query your data for trending, risk mitigation, and planning. Then, with the ability to assess what's happening and its potential impact, you can make informed decisions that optimize performance, and illustrate the effectiveness of your security operation.

Perspective is available in the following four editions:

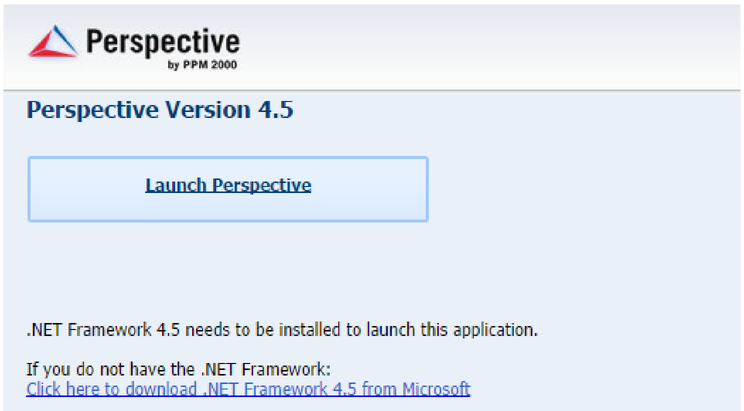
- **AIR**: Activity & Incident Reporting Software
- **SOC**: Security Operations Center Software
- **ICM**: Investigation & Case Management Software
- **EIM**: Enterprise Incident Management Software

These four Perspective editions offer just the right level of functionality for your specific incident management needs. Throughout this guide, variances in feature and functionality between the four editions are specifically identified. All screenshots reflect the EIM version of Perspective. Note that your Perspective system may not look identical to the sample system described in this guide; your system may be customized with field labels, lookup list options, and user defined fields that are unique to your organization.

Note: Investigation Management is only available in the ICM and EIM Editions of Perspective.

Accessing Perspective

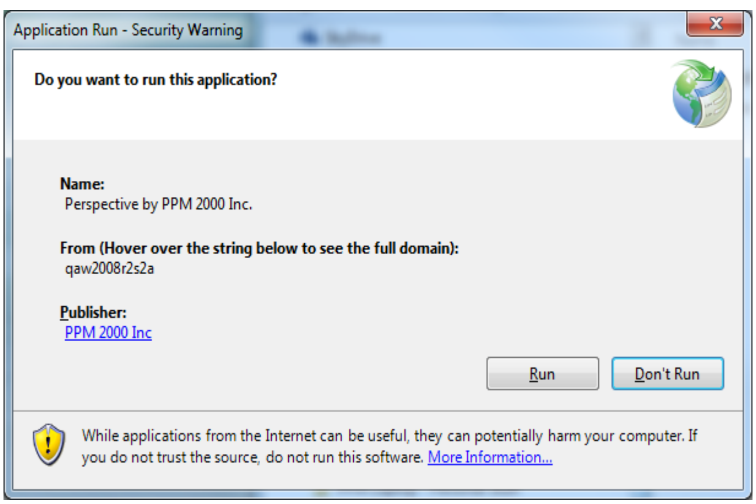
1. In order to access Perspective, navigate to your Perspective Services URL: **http://<IISServer>/PerspectiveServices**. <IISServer> refers to the Perspective Web server installed during the installation of Perspective.

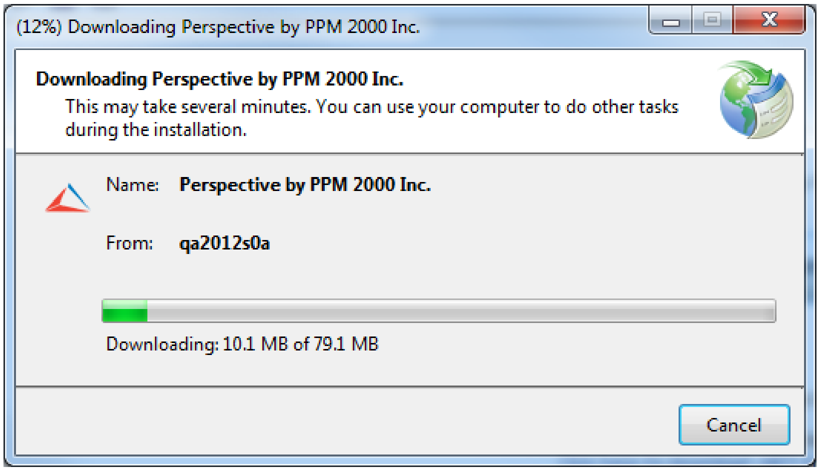


2. Click the **Launch Perspective** button.

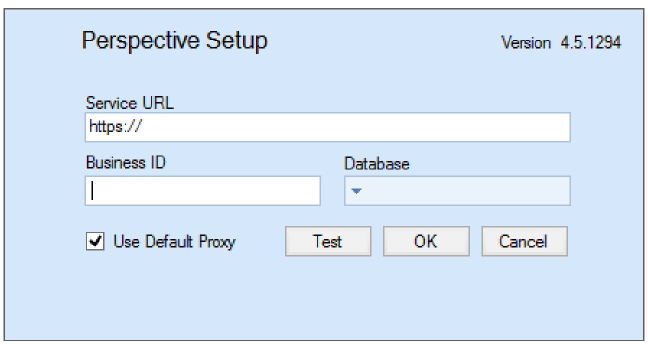
3. If launching for the first time, do the following steps (otherwise, skip to step 4):

   a. In the Security Warning window, click **Run**. Perspective will download and install.





b. After Perspective downloads and installs, you're prompted to enter a URL. The URL should be automatically populated; if so, move to the next step. If not, click the **gear** icon and enter your Perspective Services URL (as before): **http://<IISServer>/PerspectiveServices**. <IISServer> refers to the Perspective web server installed during the installation of Perspective.



c. Click **Test** to test your connection.

d. Click **OK**.

4. Once connected, a Logon window will appear. Enter the **User Name** and **Password** assigned to you by your Administrator.

   Note: If your system uses Windows® authentication, the login will be performed automatically. To switch back to the standard Perspective login, press the F5 key on your keyboard.

5. Click the **Logon** button.

To **create a shortcut** to the application on the client machine's desktop, proceed as follows:

1. Navigate to the Perspective Services URL.
2. Right-click the **Launch Perspective** button.
3. Select **Copy Shortcut**.
4. Right-click the client desktop.
5. Select **Paste Shortcut**.

User Interface

Perspective's user interface is interactive, which means that it is constructed to match the current working process (e.g., creating a record, analyzing data, filing a report). While the standard icons of the Ribbon and the components of the Navigation pane remain constant, the rest of the screen content changes depending on the currently active Perspective component selected from the Navigation pane.

Perspective's user interface consists of the following broad parts:

1. **The Ribbon**: Locates the most frequently used general administration, navigation, help, and search tools.

   In the Data Forms component, the Visual Analysis icon is added. Visual Analysis assists by visually representing relationships between the records stored in Perspective's database.

   In the Analysis Expert component, the Ribbon is populated with an additional set of icons that perform saving, adding, cloning, deletion, sharing, and execution of queries.

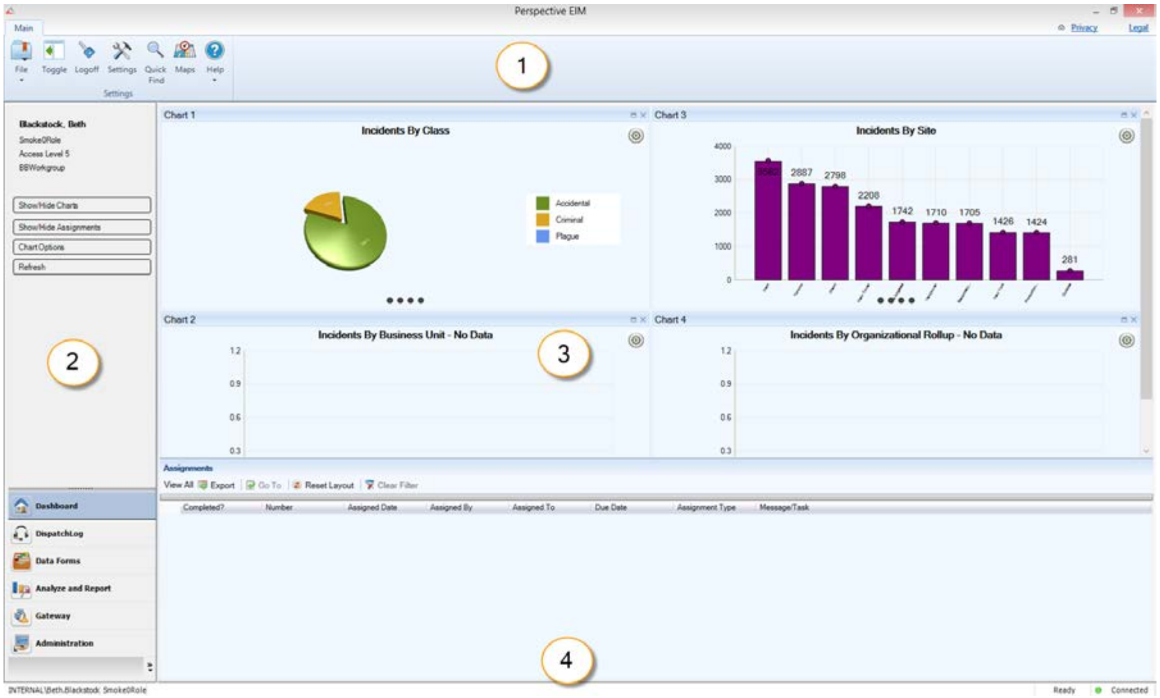
Hide the Ribbon by clicking the icon on the top right corner (next to the Privacy link). Click the icon again to show the Ribbon.

To read Perspective's Privacy Statement, click the **Privacy** link. To read Perspective's Legal Notice, click the **Legal** link.

2. **Navigation pane**: Consists of the two major parts: the bottom part allows you to select different Perspective components (Dashboard, DispatchLog, Analysis Expert, Reports, etc.), while the top part displays the component-specific navigation options. Using the top part of the Navigation pane, you will be able to control the workflow within the individual Perspective components (e.g., open the DispatchLog console, modify the view of your Perspective records, customize reports, and specify query settings). To hide the Navigation pane, click the **Toggle Navigation Window** icon on the Ribbon. Click the icon again to make the pane reappear.

3. **Main screen**: Consists of one or more sections and displays the core record data stored in Perspective (depending on the currently active component). For instance, the main screen in the Data Forms, and the Gateway components, consists of a Listing pane with a list of records and a Viewing pane, where data of the record selected in the Listing pane is displayed.

4. **Status bar**: Contains your system and login information, including your username, role, and your current Perspective's system and connection status (e.g., Connected/Disconnected). After performing an action on a record, check the status bar at the bottom of the screen for a confirmation message. The status bar will indicate when Perspective is in the process of completing an action (e.g., Loading, Saving, Deleting) and also specify if an action is complete and successful (e.g., "Record is successfully saved"), or unsuccessful (e.g., "Please provide required fields before saving").



Main System Components

You can access all of Perspective's features and functionality from the Navigation pane. Just click on the buttons to switch between components, and then further explore each component by clicking on the options displayed.

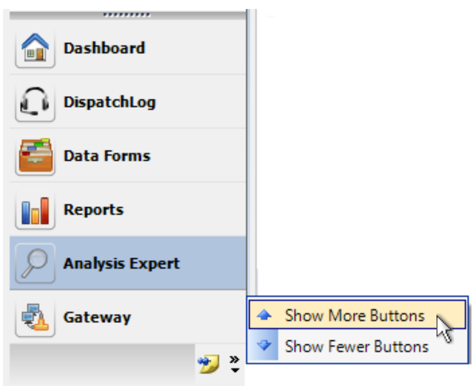
Note: The components any particular user sees is dependent on that user's privileges and access rights. Refer to User Privileges and Access Rights section *for more information.*

Main System Components

Dashboard	Dashboard is Perspective's opening screen. Use it to track ongoing projects in the Assignments section, and quickly review selected records' trends and statistics in the Charts area.
DispatchLog	Opens a separate DispatchLog console window that assists in centralized dispatching of officers and organizations. Please consult the *Perspective DispatchLog* chapter for a complete description of dispatching procedures.
Data Forms	Enter, update, and review your Activity, Incident, Case (Perspective ICM and EIM only), Item, Person, Organization, and Vehicle records in Data Forms.

Analyze and Report	Use Analysis Expert to query records for specific data, and then turn your results into a printed grid, spreadsheet, chart, or report. Choose from a number of pre-set reports to generate statistics and analyze trends in your data. Or use Custom Reports to create your own reports.
Gateway	Gateway serves as an inbox for all electronically submitted reports. Selected users assess each report before accepting it into Perspective or deleting it from the system.
Administration	Designated Administrators use this component to manage system settings, workgroups, roles, users, officers, auditing, languages, some components of the system interface, and visual alerts. The functions of the Administration component are described in the *Perspective Administrator's Guide*.

Customize visibility of the components by dragging the top border of the component section in the Navigation pane, or by clicking the configure arrow buttons. This will hide the bottom components one by one. Click on the **pin** icon to return the hidden component back to the pane.



User Privileges and Access Rights

Every Perspective user's visibility and access rights are customized by a user, or users, designated as the Administrator(s).

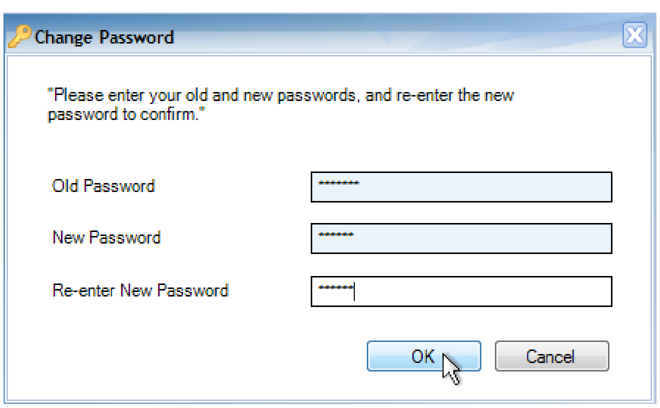
Some basic users may only be authorized to read and add new records, without any editing, locking, unlocking, or deleting privileges. The records they are permitted to read may also be restricted by various security controls, and some forms may not be visible (e.g., Investigations forms—which is limited to ICM and EIM—or the Controls tab). Furthermore, these basic users may be restricted from advanced components, such as Analysis Expert or Reports. On the other hand, highly advanced users may have full access to all system components, forms, fields, and functions.

If you are unable to view a particular component or form, or if you are not permitted to perform a certain function, it may be a result of your assigned user privileges. For more information on how data is segregated within Perspective and how user visibility and access rights are assigned, refer to the "Security Layer Overview" chapter in the *Perspective Administrator's Guide*, or, if you possess appropriate access rights, in the online *Admin Help*.

Account Settings

Changing Your Password

1. To initiate the change of your current account password, click the **File** icon on the Ribbon.
2. Select **Change Password**.
3. In the dialog window, enter your **Old Password** and your **New Password**.
4. Re-enter your new password in the field below to confirm the password configuration.
5. Click **OK** to save the change and verify your new password.



Dashboard Settings

By default, your Dashboard is set to automatically refresh once every minute. You may set your Dashboard to automatically refresh less frequently or to require manual reloading.

1. Click the **Settings** icon on the Ribbon. The Settings window will open with the General tab open by default.

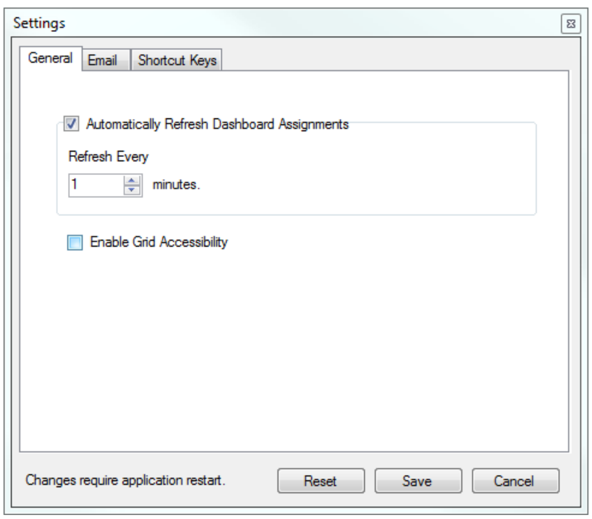
2. To modify how often your Dashboard refreshes, ensure the **Automatically Refresh Dashboard Assignments** box is checked, and in the field below, specify how frequently you would like the Dashboard to refresh (from once every minute to once every sixty minutes).

   To set your Dashboard to require manual reloading, uncheck the Automatically Refresh Dashboard Assignments box.

3. Click **Save**.

   - At any time, you may click **Reset** to return your Dashboard to its default refresh settings.

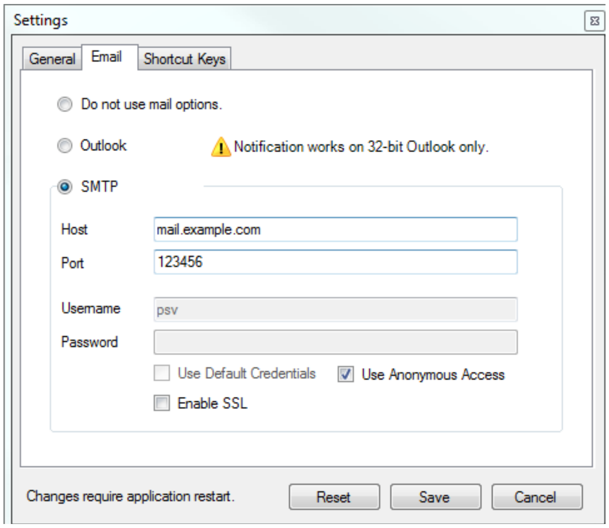
4. Restart Perspective (log out, then log back in) to enforce any changes that you have made.



Email Settings

During the Perspective installation process, your system was configured for either Outlook or SMTP email integration. Alternatively, your email options may have been disabled. Depending on the setup, you may be permitted to modify your default email settings.

1. Click the **Settings** icon on the Ribbon. The Settings window will open.



2. Select the **Email** tab.

3. If you do not want the option of sending email messages in Perspective, select the **Do not use mail options** radio button.

   - Alternatively, select the **Outlook** radio button to configure Perspective to deliver email messages directly to your local Microsoft® Outlook® client.

   Select the **SMTP** radio button to configure Perspective to deliver email messages using SMTP integration:

   a. Enter your **Host** and **Port** information.

   b. Specify your **Username** and **Password**, or check the **Use Default Credentials** box.

   c. Alternatively, check the **Use Anonymous Access** box to send email messages without any user credentials.

   d. To specify whether Secure Socket Layer (SSL) is used to encrypt the connection, click the **Enable SSL** box.

4. Click **Save**.

   - At any time, you may click **Reset** to return your email settings to their original system defaults.

5. Restart Perspective to enforce any changes that you have made.

Shortcut Keys

Shortcut keys enable you to map commonly used Perspective functions to shortcut key combinations for quick access.

1. Click the **Settings** icon  on the Ribbon. The Settings window will open.

2. Select the **Shortcut Keys** tab.

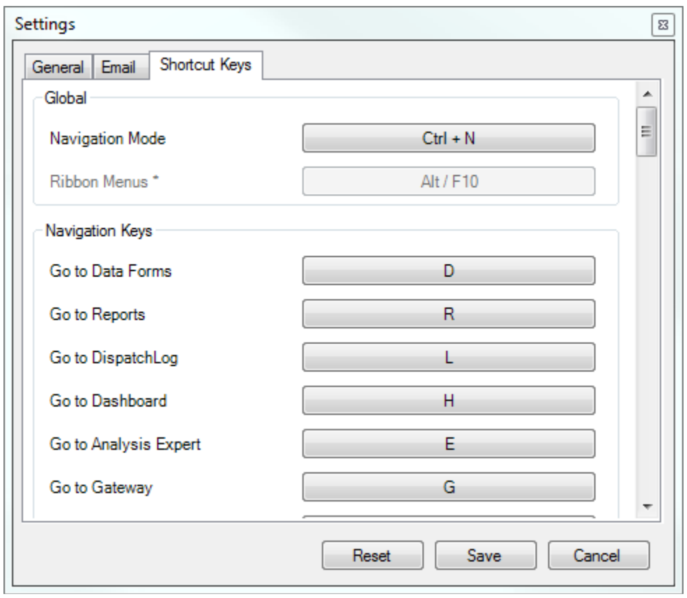
3. For every key you want to change, do the following:

   a. Click the function's button.

   b. Tap the new key combination you want to use. If the shortcut is being used elsewhere, you'll be prompted to confirm your selection.

4. Click **Save**.

   - At any time, you may click **Reset** to return your shortcut key settings to their original system defaults.



The default settings for shortcut keys are as follows:

Shortcut Keys

Function Name	**Default Key Combination**
Global	
Navigation Mode	Ctrl + N
Ribbon Menus *	Alt/F10
Navigation Keys	
Go to Data Forms	D

Go to DispatchLog	L
Go to Dashboard	H
Go to Analysis Expert	E
Go to Gateway	G
Go to Administration	M
Go to Activities	A
Go to Incidents	I
Go to Cases	C
Go to Items	S
Go to Persons	P
Go to Organizations	O
Go to Vehicles	V
List All Records	W
Open Quick View	Q
Show Saved Views	K
Focus on List Pane	F
Hide List Pane	Y
Change Password	1
Exit Perspective	2
Admin Help	8
User Help	9
Toggle Navigation Pane	3

Logoff	4
Settings	5
Quick Find	6
Open Visual Analysis	7
About Perspective	0
Hide Ribbon Menu	Minus
View Legal Notice	F3
View Privacy Policy	F2
Go to Client Site	F5
Maps	F6
Record Details	
Save	Ctrl + S
Edit	Ctrl + E
Merge	Ctrl + U
Add From Source	Ctrl + G
Delete	Ctrl + Minus
Add	Ctrl + Plus
Cancel	Ctrl + K
Create Incident	Ctrl + I
Lock/Unlock	Ctrl + L
Print	Ctrl + P
Send	Ctrl + M

View Record Audit Info	Ctrl + D
Focus on Details Tabs	Ctrl + F
Back to List Pane	Ctrl + B
List Pane	
Select Top Record	Ctrl + T
Print List	Ctrl + P
Sort List	Ctrl + O
Next Page	Ctrl + Right Arrow
Last Page	Ctrl + Down Arrow
Previous Page	Ctrl + Left Arrow
First Page	Ctrl + Up Arrow
Jump to Page	Ctrl + 1
Focus on Selected Record	Ctrl + L
Add *	Ctrl + Plus
Edit *	Ctrl + E
Focus on Details Tabs *	Ctrl + F
Delete *	Ctrl + Minus
Controls	
Link Record: Open List	Ctrl + W
Link Record: Quick View	Ctrl + Q
Large Text Field: Spell Check	Ctrl + Q
URL Field: Open URL	Ctrl + Q

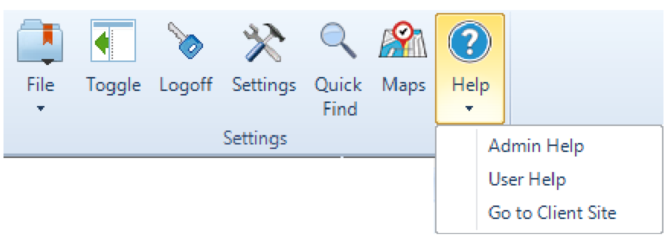
Interview: Toggle Fields	Ctrl + F
Analyze and Report	
Reports	Ctrl + R
Queries	Ctrl + Q
Custom Reports	Ctrl + E

** Not configurable or must be set in another section.*

Help Options

Whether you are learning how to use Perspective or looking for information on a specific topic, Perspective Help explains how to use program features, identify windows and fields, and answer common questions.

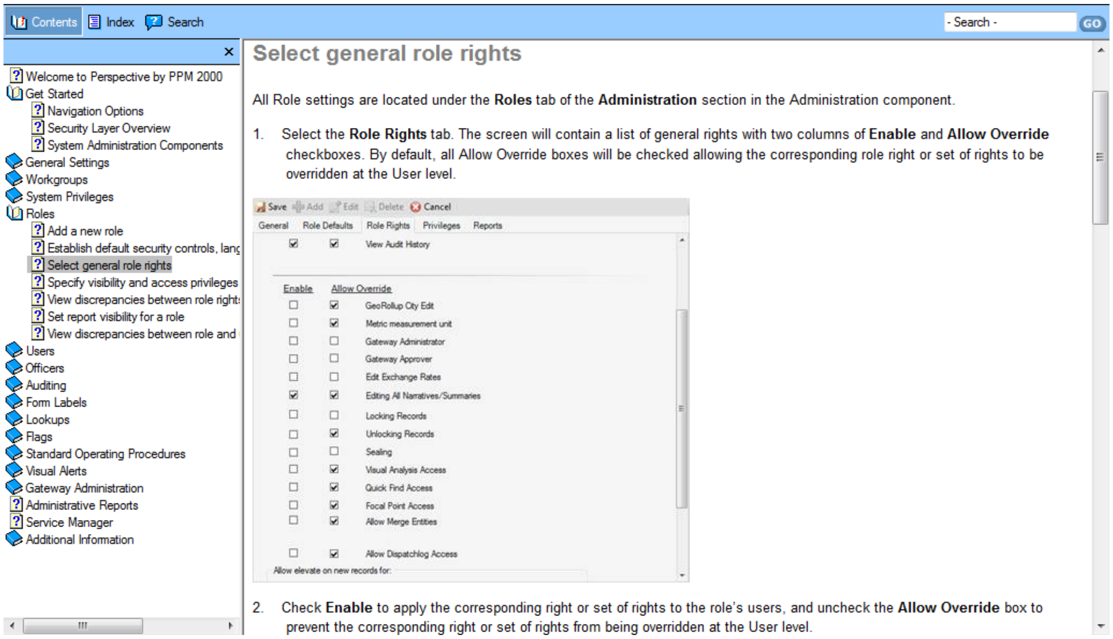
- To open one of the available Help files, click the **Help** icon located on the Ribbon. Click on **User Help** to access general Help files. Select **Admin Help** to access Administrator-specific Help files (requires appropriate permissions).



- To navigate through the Help file, click the Contents button on the upper left corner, or the links on the top right corner.
- In the Help screens, look for words that are hyperlink blue; these link to other topics with related information.

Contents Tab: Browse Help by topic

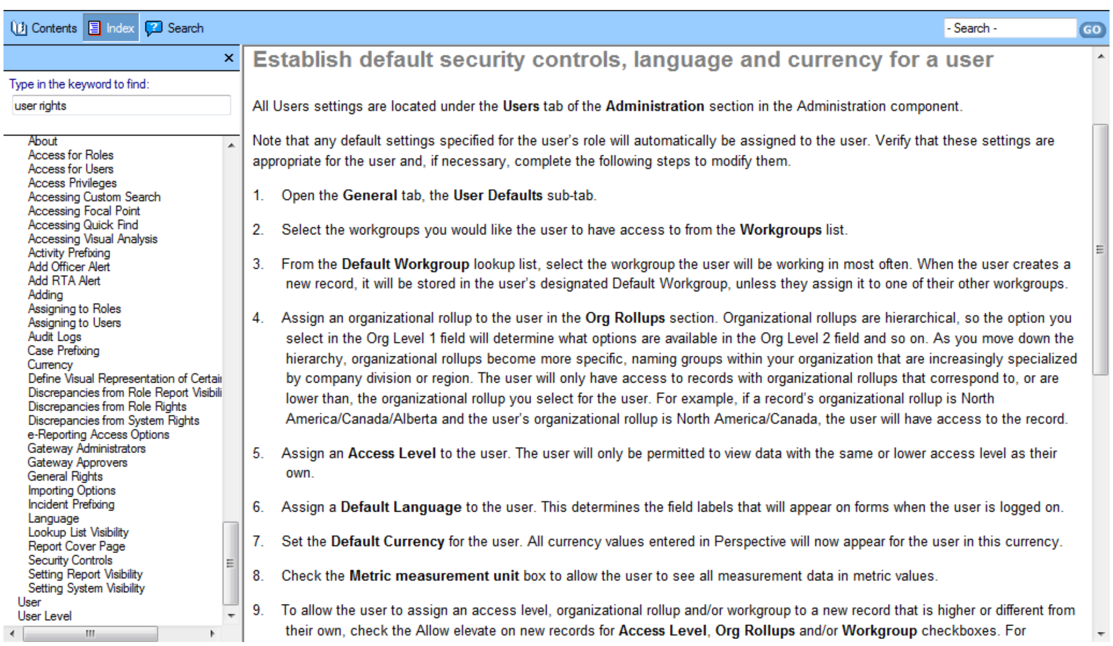
1. Click a **book** button to open it and view the chapters and pages contained within.
2. Then click a **page** icon to fill the Viewing pane with information on the selected subject.



Index Tab: Browse Help by Index

1. Scroll through the listed keywords or type a keyword to reference.

2. Click a keyword from the list to display the associated topic.



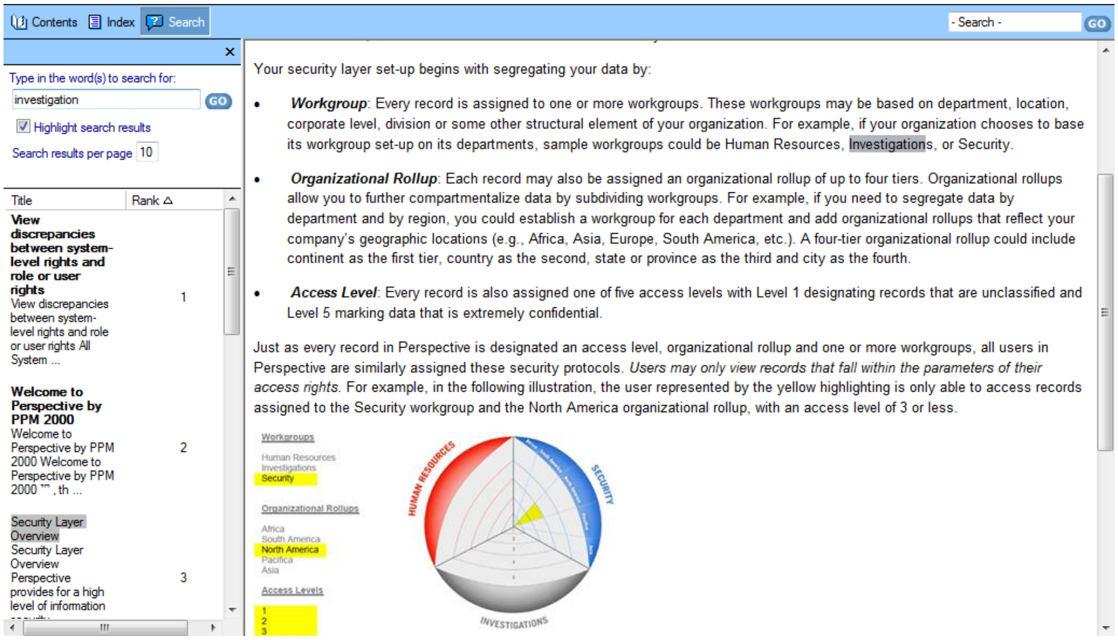
Search Tab: Search Help

1. Type a word or phrase and click the **Go** button.

   - Perspective Help will list topics containing the word or phrase below.

2. Click the topic you want to display.

    - The topic will appear in the Viewing pane.



Quick Find Tool

The Quick Find tool allows you to easily locate records containing the text that you specify. It will check text fields across your Perspective database (such as summaries, narratives, and text attachments) for the words or phrases that you type. The Quick Find attachment indexing supports the following file formats: .doc, .docx, .docm, .xls, .xlsx, .pdf, .txt, .text, .rtf, .sms, .log, .msg, .wpd, and .wps.

Note: The Quick Find tool requires an indexed database to function properly. Contact your Perspective Administrator for further information.

1. Click the **Quick Find** button on the Ribbon.

2. In the **Enter Search String** field, type the text that you want to find.

    To ensure that your search returns accurate results, please consider the following tips:

    - To search for an exact matching phrase, enclose it in quotation marks.

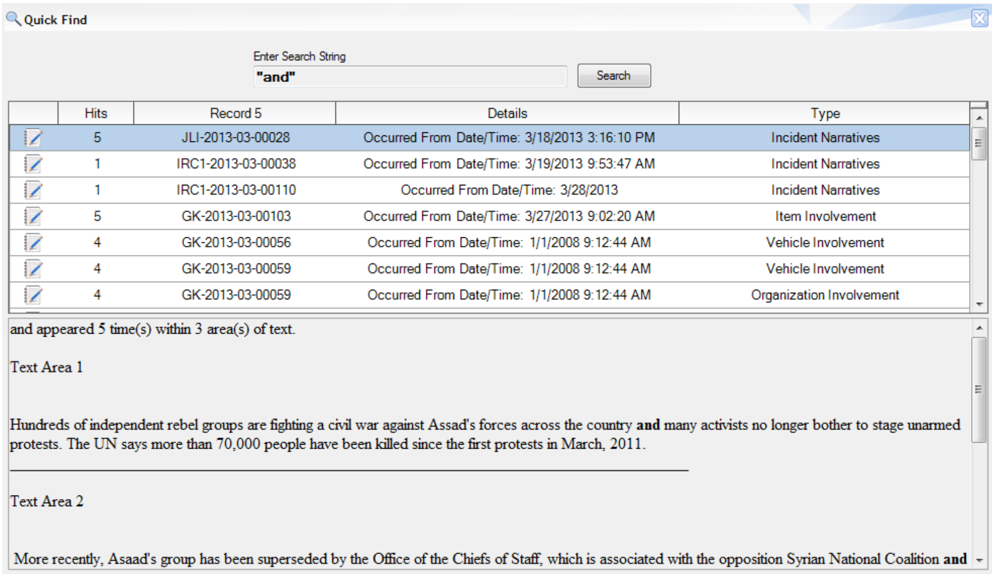
    - To search for records containing two or more words or phrases, join the words or phrases with an AND operator. For example, if you want to search for records containing the words black and coat, use the following search string: black AND coat.

    - To search for records containing either one word or phrase or another word or phrase, join the words or phrases with an OR operator. For example, if you want to search for records containing either the word laptop or the word computer, use the following search string, laptop OR computer.

- Use wildcards to search for words and phrases that start, end, or simply contain particular characters. Perspective's Quick Find supports the * (asterisk) wildcard as a substitute for zero or more characters. For example, if you want to search for records containing words (numbers, names, cities, etc.) that start with san, use the following search string: 'san*'. If you want to search for records with words that contain the pattern ger, use the following search string: '**ger**'.

Note: Previews for matching records found with the help of the wildcards will not be displayed.

3. Click **Search**.
    - A list of records containing the specified word or phrase will appear in the grid below. The number of times the word or phrase appears in each record will be noted in the Hits column. As well, the specific form that the word or phrase was found in will be listed (e.g., Incident Narrative, Investigation Summary, Person Attachment).
4. To quickly scan the results, select a record in the list.
    - A preview of the record segment containing the word or phrase will appear in the pane below.
5. Double-click a record in the list to open it.
    - Perspective will advance to the selected record in Data Forms, with focus on the form containing the word or phrase. (The Quick Find window may still be opened in the foreground; in this case, minimize the Quick Find window to view Perspective.)



Custom Search Feature

The Custom Search feature allows you to launch the Infoglide Identity Resolution Engine™ (IRE) from Perspective, to search within several data sources at once.

Note: Custom Search must first be configured in the Perspective Service Manager before it may be accessed in Perspective. For further details, please see the Perspective Installation Guide.

1. Click the **Custom Search** icon  on the Ribbon.
    - The Infoglide Identity Resolution Engine will open in a new window.
2. Following the basic search principles described in the "Quick Find Tool" section of this chapter, perform the custom search required.
3. When finished, close the window to return to Perspective.

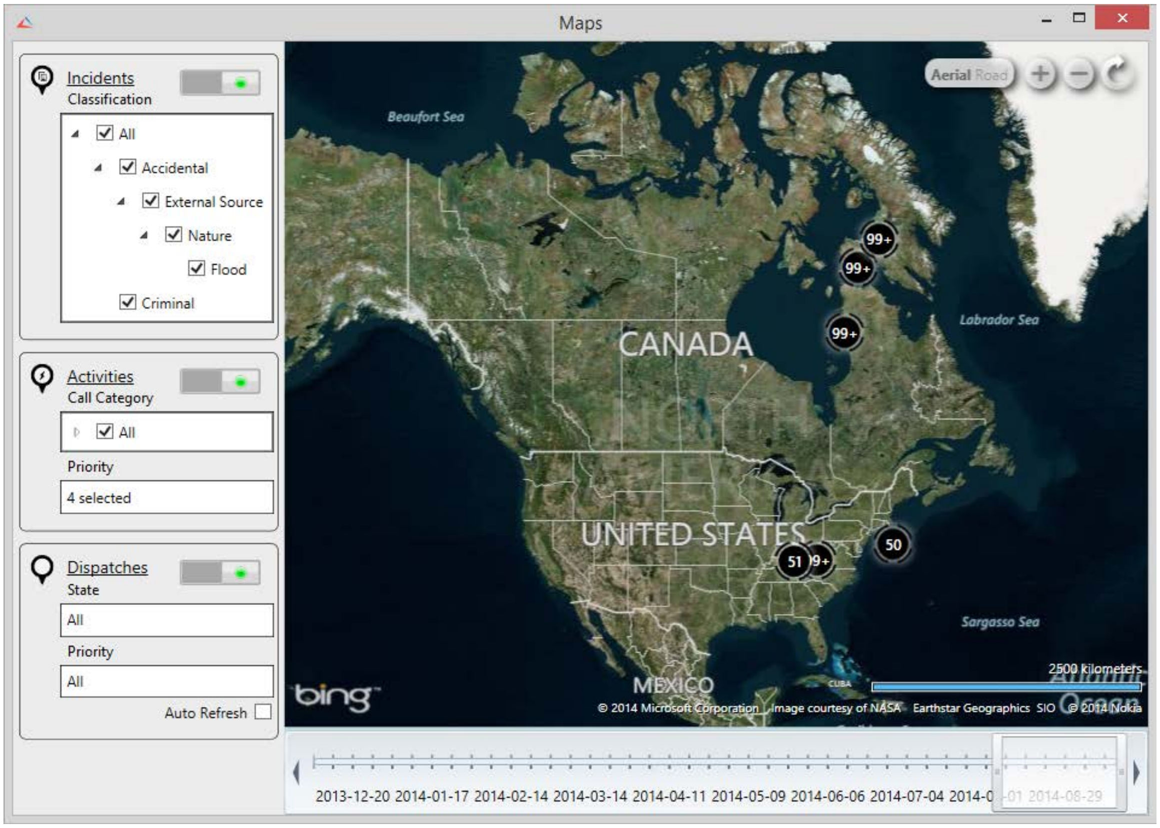
Maps

Perspective Maps allows you to quickly see where a Dispatch is occurring, or where an Activity or Incident has occurred. Perspective's mapping tool allows you to quickly access any record you want.

All Dispatches, Activities, and Incidents will appear on the map. You can easily define the records you want displayed with the filter option.

From the mapping tool, you can see relevant tooltips that contain information like the Class, Category, Occurred Time, Priority, and Status (the information you are able to see depends on if you are looking at an Incident, Activity, or Dispatch). From here, you can select the record you want to open and look at it in more detail.

Note: The Mapping option requires an internet connection.



Features

Map view: The Aerial map is the default map. To switch to Road map, click the button Aerial/Road button on the top right corner of the Maps window.

Zoom: You can zoom in or out on the map by using the or buttons, or by using the scroll button on your mouse.

Incidents and Activities auto refresh: The map automatically refreshes Incidents and Activities every 15 minutes, but if you want to refresh it sooner, click the refresh button. Pressing the F5 button will also refresh the Incidents and Activities.

Dispatches auto refresh: To automatically refresh Dispatches on the map, you need to have the Auto Refresh checkbox selected (located in the Dispatches section on the Maps page). If this checkbox is selected, the Dispatches will refresh in less than one minute.

Note: Dispatch auto refresh only works if the date range is set to the last seven days. If your date range is set to the last 14 days and you check the Dispatch auto refresh checkbox, your timeline will be reset to the last 7 days, or auto refresh will deselect automatically if you expand your date range to over 7 days with auto refresh enabled.

Date Range: Use the left and right arrows on the date range to move backwards in time, or drag and drop the date range bar to the occurred dates of Incidents, Activities, and/or Dispatches you want to see on the map.

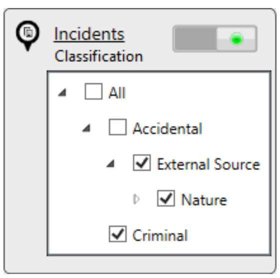
Scale: Your map's scale will be automatically set to go off of your computer's system settings.

Filters: To filter what you want to see displayed on the map, turn the switch to on or off . For example, if you only want Incidents to be displayed, turn the Activities and Dispatches filter switch to the off position. By filtering out Incidents, Activities, or Dispatches, it will make it easier for you to find exactly what you are looking for.

Incidents

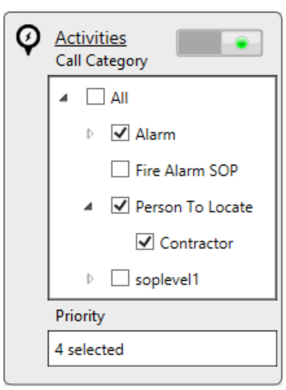
Note: If you do not have privileges for Incidents, Activities, particular Workgroups, etc., those records will not display in Mapping.

You can search by all Class Rollups, or drill down to only search for specific Classifications (i.e., Criminal Incidents).



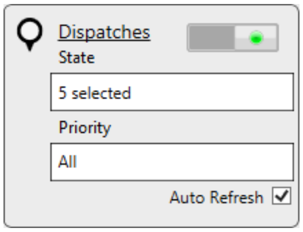
Activities

You can search by all Call Categories and Priorities, or drill down to only search for specific Call Categories or Priorities.



Dispatches

You can search by all States and Priorities, or drill down to only search for specific States or Priorities.

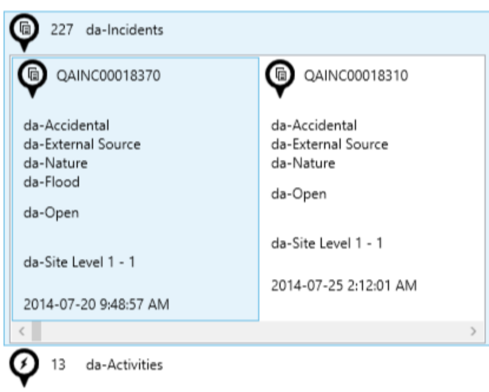


Tooltips

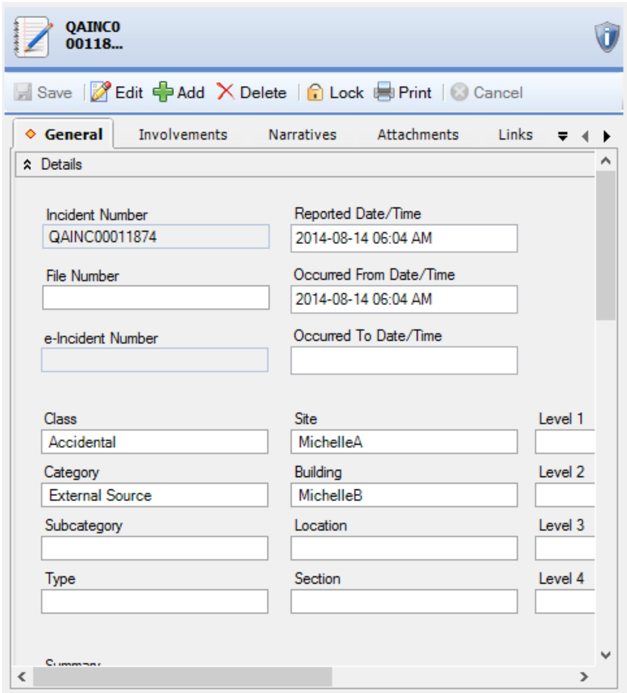
Tooltips are how you dig deeper into an Incident, Activity, or Dispatch, to determine if it is the one you are looking for. To look at tooltips, simply hover over the pin  on the map. A pin is a circle with a number in the middle, where the number represents how many Incidents or Activities have occurred in that location, or how many Dispatches are occurring in that location.

When you hover over the pin, the tooltip will appear. First, you will be shown a count of the number of Activities, Incidents, and Dispatches that are in that pin.

From here, click once on the word Activities, Incidents, or Dispatches, depending on what you want to look at. For example, if you click on the word Incidents, all the Incidents in that pin will open in greater detail. To scroll through them, use the scrollbar that appears in the window.



Once you have found the record you are looking for, click on it, and it will open in Perspective. The map will remain opened in another window.



Note: A pin will only go up to 99+. However, you can hover over the pin and the tooltip will open, allowing you to scroll through all Incidents, Activities, and Dispatches that have occurred or are occurring in that location. Double click on pin clusters to zoom in.

Exiting Perspective

There are two options to exit Perspective:

- **Logoff option**: Log off the current user while leaving the Perspective system running. To log off, click the **Logoff** key icon on the Ribbon, or use the keyboard shortcut **Ctrl+Shift+L**.
- **Exit option**: Completely exit Perspective, which requires a full system reload upon the next login. To exit Perspective, close the Perspective window, use the keyboard shortcut **Alt+F4** (or click on the **File** icon), and select **Exit**.

Note: While the Logoff option requires an additional confirmation of your choice to exit Perspective via a confirmation window, the Exit option will simply terminate the work of Perspective as soon as you choose to exit.

*Before exiting Perspective (regardless of which exit option you choose), you have to press the **Save** button to save any changes you have made to records while working in Perspective.*

Dashboard

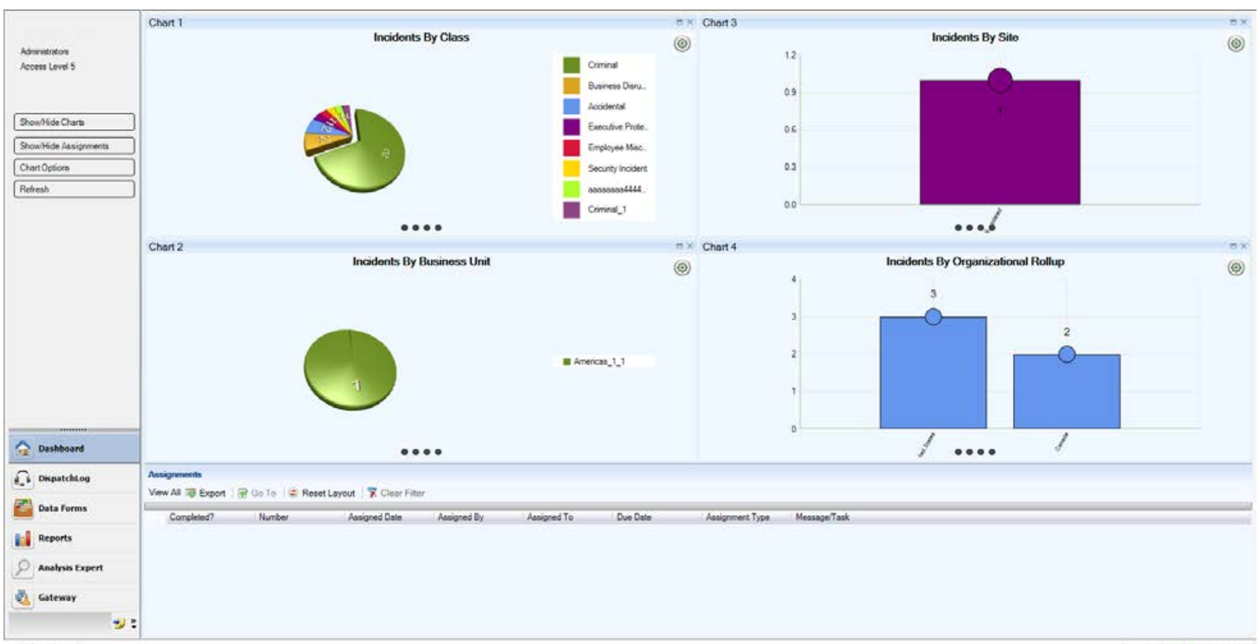
The Dashboard is Perspective's default screen. Like the dashboard of an automobile with its various gauges and indicator lights, Perspective's Dashboard keeps users informed about what is happening in their organization and alerts them of important changes. It helps to track ongoing projects and tasks, and includes a statistics snapshot section for the incidents the user has access to.

User Interface

The two elements of the Dashboard are Charts and Assignments.

1. **Charts**: Get a quick overview of incident trends and statistics with the help of up to four selected bar or pie charts.

2. **Assignments**: Track activities or projects assigned to you, as well as those you have assigned to others, from start to finish.



- Resize the individual elements by dragging the borders surrounding them.

- To display/hide one of the Dashboard elements, click **Show/Hide Charts**, or **Show/Hide Assignments** on the Navigation pane.

- To refresh the view of the Dashboard, click the **Refresh** button on the Navigation pane.

Charts

The four pre-set charts on the Dashboard give you a quick overview of trends found in the Perspective database records you have access to. To select the combination of up to four charts for display on the Dashboard, follow the steps described below.

1. Click the **Chart Options** button on the Navigation pane.

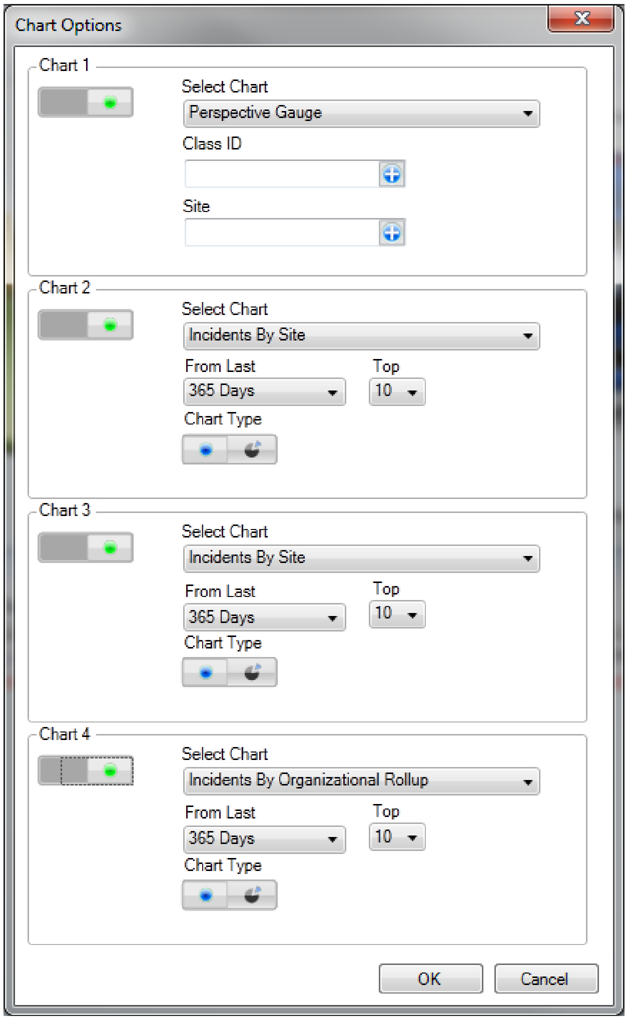
2. In the Chart Settings window, click on the **ON/OFF** switch to display or hide one of the chart sections.

3. Within the relevant chart field (e.g., Chart 1), choose the chart you would like to appear in the selected chart section (e.g., Incident by Class).

   - For a complete list of available pre-configured charts and their descriptions, see "Appendix A: Dashboard Chart Types".

4. Depending on the chart specified, a number of further settings will be displayed, which may (or may not) include the following:

   - **From Last**: Select the time period for which you would like to see the statistics on the chart (e.g., 365 days).
   - **Top**: Specify the number of categories you would like to display on your chart (e.g., top 10 classes).
   - **Call Category:** Restrict your data to a specific Call Category, making it as narrow as necessary. Click the **plus** icon next to the Call Category field, and select the required number of levels of category by which you would like to restrict the data in the chart.
   - **Class ID:** Restrict your data to a specific Class, making it as narrow as necessary. Click the **plus** icon next to the Class ID field, and select the required number of class levels (i.e., Class/Category/Subcategory/Type) by which you would like to restrict the data in the chart.
   - **Site:** Restrict your data to a specific Site, making it as detailed as necessary. Click the **plus** icon next to the Site field, and select the required number of site levels (i.e., Site/Building/Location/Section) by which you would like to restrict the data in the chart.
   - **Category ID:** Restrict the Case data in your chart to either Internal or External cases.
   - **Year**: Select the specific year you want to display your data for (e.g., 2011)
   - **Chart Type**: Choose either the pie or bar chart type.



5. Click **OK** to see the results displayed on the Dashboard.

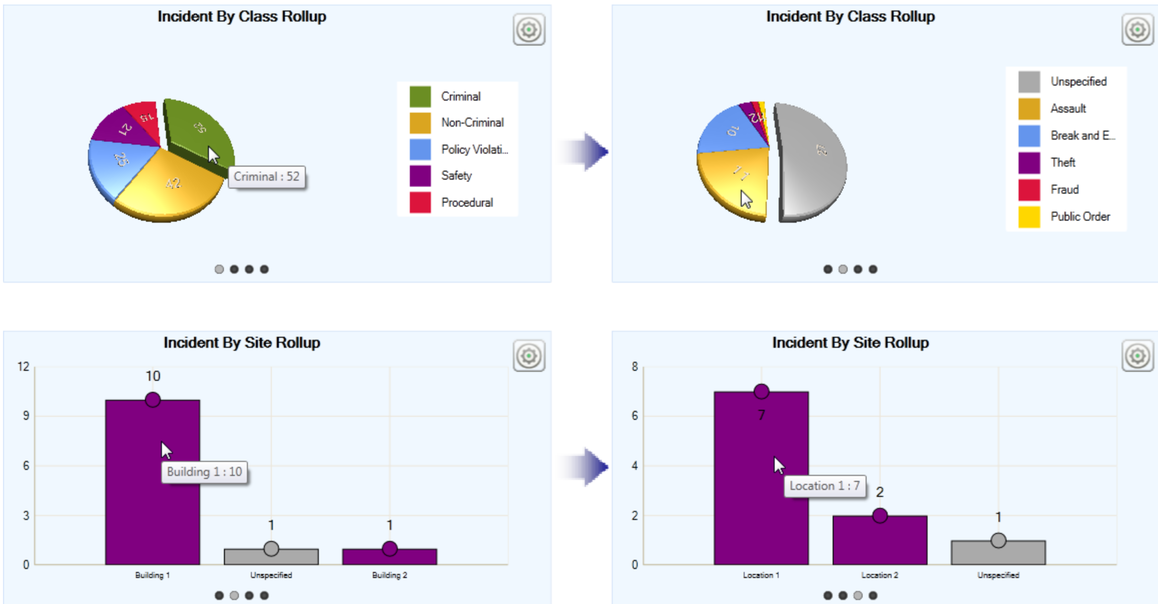
6. At any time, you may change the chart options for each individual chart displayed on the Dashboard by clicking the corresponding **Settings** icon.

   - This will open the options window for the chart that you chose to modify.

7. Examine one particular chart in detail by clicking the **Maximize** icon in the upper right corner of the relevant chart section. To dock it back together with the rest of the charts, click the equivalent **Minimize** icon.

8. If the chart you selected is either a uni-coloured bar chart or a pie chart, you may be able to explore the information contained in the chart further. By clicking on a bar or a pie sector that corresponds to a specific category, class, organization, or site, you may expand the data that is hierarchically subordinate to the data currently displayed on the screen. For example, if you are viewing the Incident By Class chart, you may click on the green pie sector that corresponds to the Criminal class of incidents to open a pie chart for all incidents contained under the Criminal class (e.g., Assault, Theft, Fraud). To explore the data even further, you may click on the yellow pie sector that corresponds to the Assault category of incidents.

The number of subordinate charts corresponds to the number of tiers under the corresponding rollup (in our example, the Class Rollup). To navigate within the hierarchy, click on one of the dark gray circle icons displayed below the chart. Each circle represents one tier of the rollup, in ascending order.



9. To copy a chart image, right-click the chart and select **Copy to Clipboard**.

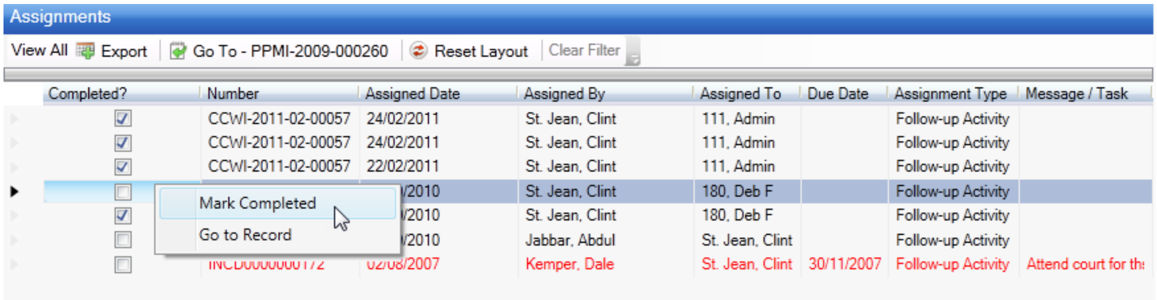
Assignments

When you receive or delegate an assignment to another user, the assignment is displayed on your Dashboard. You may also receive an email notification about the assignment, and if you are logged on to Perspective at the time, a pop-up will appear in the bottom right corner of your screen alerting you to the email. Incomplete assignments that are past their due date are listed in red font.

Along with your assignment's associated Activity, Incident, or Case Number, the Dashboard's Assignments section displays the following information:

- **Completed**: A checkbox indicating whether or not the assignment has been completed.
- **Assigned Date**: The date the assignment was delegated to the user.
- **Assigned By**: The user who created the assignment.
- **Assigned To**: The user who is responsible for completing the assignment.
- **Due Date**: The date the assignment must be completed.
- **Assignment Type**: The nature of the assignment, such as Correction Notice, Follow-up Activity, Information Request, Investigative Action, or Verification.

- **Message**: The details of the assignment.



You may perform a number of assignment-related tasks directly from your Dashboard:

- To add an assignment to your email application's calendar, select the assignment and click **Export** . A window will open allowing you to schedule the assignment using external applications.

- To open an assignment's corresponding Activity, Incident, or Case record, double-click the assignment record, or highlight the assignment and click **Go To** . Perspective will leave Dashboard and advance to the applicable record in Data Forms.

- Once the assignment has been completed, highlight the assignment on the Dashboard, then right-click and select **Mark Completed**. A pop-up window will appear asking if you would like to send the Assigned By person an email notifying them of the assignment's completion. Click **Yes** or **No**.

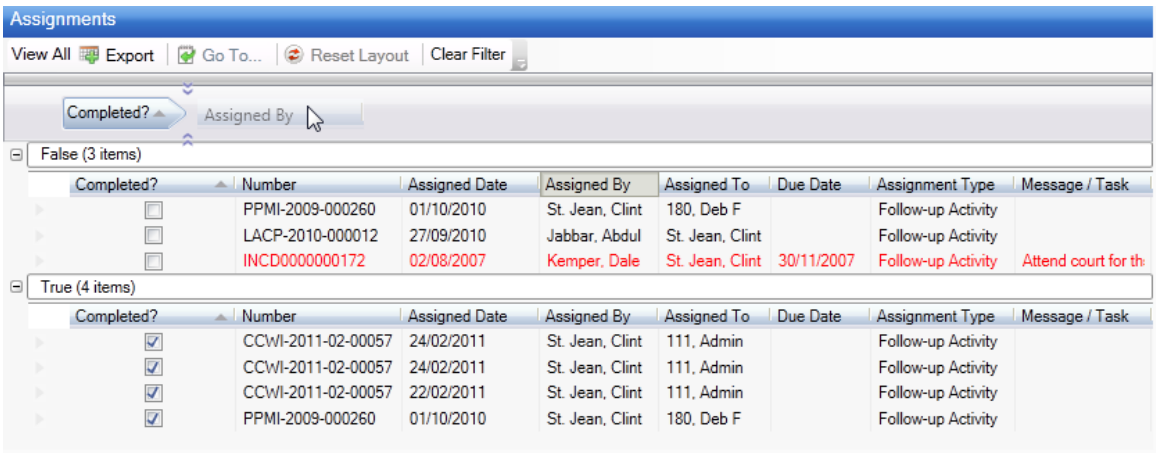
- By default, only incomplete assignments will appear in the Assignments section of the Dashboard. To display all assignments, complete and incomplete, click **View All**. Click **View All** again to hide completed assignments.

Like the other grids, Perspective provides several sorting options for Assignments:

- To reorder the grid columns in the Assignments section, drag the column headings to the desired location. Drop them into place once the indicator arrows have appeared pointing to the correct spot. To reset the order of columns to their default position, click **Reset Layout** .

- To sort assignments by a particular column (e.g., Incident Number, Assignment Type, Due Date), click the column heading once. Click the heading again to sort the data in reverse order. Click **Clear Filter** to return to the unsorted view.

- To group assignments by Assigned Date, Assigned By, Assigned To persons, Due Date, Assignment Type, or to group complete and incomplete assignments separately, click the thick vertical bar located at the top of the Assignments grid and drag the relevant column heading to the **Group By Area**. In our example, assignments have been grouped by their status as either "complete" (True) or "incomplete" (False). If necessary, you may build up on internal grouping, dragging additional headings to the blue field and arranging them in the required hierarchy. For instance, you may group the complete and the incomplete assignments by Assigned By persons, and so on. Click **Clear Filter** to return to the default view.

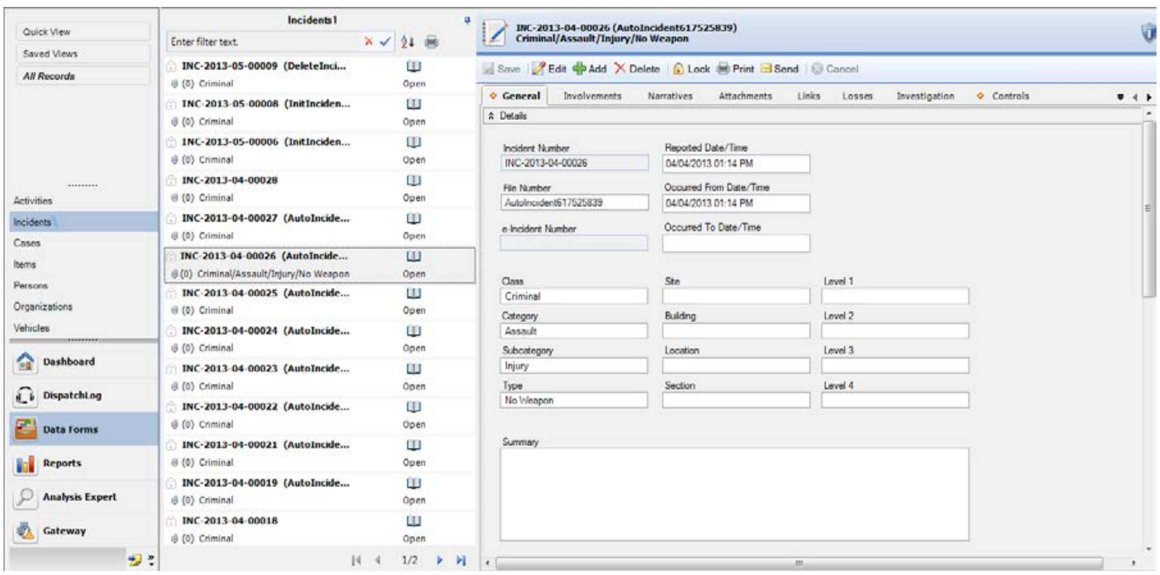


Data Forms

Data Forms is the data entry component of Perspective. These data are used for analysis and comparison to create reports and charts. Information in the Data Forms is organized into sections, so it is easy to find, review, and update records. The data forms include Activities, Incidents, Cases[*], Items, Persons, Organizations, and Vehicles. To access the Data Forms component, select it from the bottom part of the Navigation pane.

User Interface

The Data Forms interface is divided into three sections: Navigation pane, Listing pane, and Viewing pane.



1. **Navigation pane**: Allows you to move between the various data forms (e.g., Activities, Incidents, Items). To display a particular record subset in the middle Listing pane, choose a data form from the Navigation pane and select your record view (i.e., specify a Quick View, view All Records, or select a view from the Saved Views menu).

2. **Listing pane**: Provides a list of records that are available for viewing. Once you select a record in the Listing pane, the corresponding record information will be displayed in the Viewing pane on the right.

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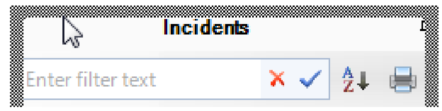
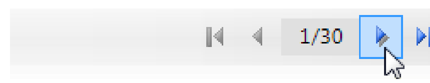
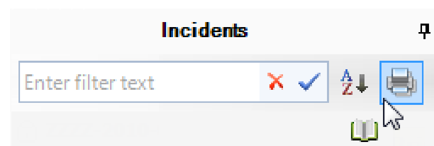
[*] The Case component is available in the ICM and EIM editions of Perspective.

Listing Pane

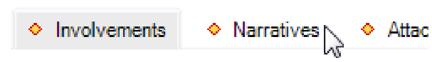
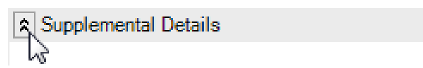
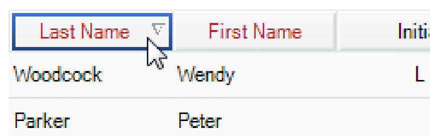
Change the orientation of the current component's (e.g., Incidents) Listing pane by dragging it to a different part of the screen. Display the pane in a separate dialog by double-clicking it or dragging it outside of the screen. To dock it back in, double-click the pane.	
To hide the Listing pane, click the Auto Hide pin icon. Once the pane is hidden, access it by clicking the pane's newly-created shortcut button on the left side of the screen, and "unpin" it by clicking the pin icon again.	
If Perspective displays a list of entities (e.g., incidents, persons) that consists of multiple pages, use the left/right navigation arrows at the bottom of the list, or type a page number in the **Page** field, to move through the pages. The total number of pages will be provided for your reference. To quickly move to the first or the last page, click the **first arrow** or the **last arrow** icons respectively.	
To print the record list as it appears in the Listing pane, click the **Print** button located at the top of the Listing pane.	

3. **Viewing pane**: Displays information of a record selected in the Listing pane and provides options for saving, editing, adding, deleting, (un)locking, printing, sending, and merging individual records.

   Note: Merge is only available for the Item, Person, Organization, and Vehicle records.

   Every record consists of a set of customized forms and subforms designed specifically for the data form type. For example, a Person record contains a separate Contact(s) tab, which is absent in such data forms as Vehicles or Items.

Viewing Pane

To view a particular segment of a selected record (e.g., Narratives), click the appropriate tab at the top of the record. The diamond symbol appearing on a tab indicates that the tab contains data. Tabs without the diamond symbol contain no saved data.	
View more tabs. If these arrows appear next to a row of tabs in a form, there are more tabs available than are currently visible on-screen.	
Expand or collapse a section to view or hide its contents.	
To resize a grid column, place the cursor between column headings. When an arrow appears, drag the column border to the desired width. To resize a column to fit its content, double-click the border of the column.	
To reorder the grid columns, drag the column heading to a new position. Drop it into place once the thick arrows have appeared, pointing to the correct spot.	
To sort the grid data by a particular column, click the column heading once. Click it again to sort the data in reverse order.	

Navigating Data Forms Overview

Every data entry/editing action in Data Forms requires you to first choose one data form type in which you intend to work in: Activities, Incidents, Cases (ICM and EIM only), Items, Persons, Organizations, or Vehicles.

Navigating the Data Forms component is a logically flowing process:

1. Select the appropriate data form type by clicking the corresponding banner located in the bottom part of the Navigation pane.

2. Using the **Quick View**, **Saved Views**, and **All Records** buttons located at the top of the Navigation pane, manage the view of the records displayed in the Listing pane. Here you may choose from either displaying all records, or a subset of records, with an option to filter and save the view for future reference.

3. Select an existing record from the Listing pane, or create a new record for the chosen data form type (e.g., a new Incident record).

4. Enter and/or modify the data contained in your active record.

5. Print your record in the form of a report.

The following chapters will address the options available for each of these steps in greater detail.

Select a Data Form

Activities Form

Use this form to create records of dispatched activities, or to manage activities imported from DispatchLog (refer to the *Perspective DispatchLog* chapter for more information). Before creating a new record, do a record search to ensure that the information has not already been entered.

Activities Form

General
• Specify the category, priority, and location of the dispatched activity. • Track the times of the dispatching progress. • Identify the persons directly involved in the processing of the activity. • Fill in the user-defined fields required by your organization. • Post notes on the activity tracking progress.
Responses
Officer Responses
• View, create a new, or edit the details of an existing officer response to the selected activity.
Organization Responses
• View, create a new, or edit the details of an existing organization response to the selected activity.
Requests
• Note an action request sent to an organization in response to the selected activity.
Involvements
Persons
• Identify all persons involved in the activity. • Record injuries sustained during the activity.

• Flag the involved person.
Organizations
• Identify all organizations involved in the activity.
Vehicles
• Document all vehicles involved in the incident.
Items
• Identify all items involved in the incident.
Attachments
• Attach a file to the Activity record.
Links
Activity Links
• Link the activity to another activity.
Incident Links
• Link the activity to an incident.
Controls
Details
• Set security controls and status of the Activity record. • Define which workgroups can access the Activity record.
Standard Operating Procedures
• Review the Standard Operating Procedures available for the activity's call category, site, and/or status. • Check off complete procedures, view relevant attachments, and access related links. • View mass notifications and/or email notifications sent in relation to the activity.
Assignments
• Give an activity-related assignment to another user.
Audit History
• View the history of all changes made to the Activity record. Visibility of Audit History depends on user permissions.

Incidents Form

Use this form to record the details of an incident and track the progress of its investigation. Every Incident record is given a unique number so it is easy to find, identify, and organize. Before creating a new record, do a record search to ensure that the information has not already been entered.

Incidents Form

General
• Create a new Incident record. • Indicate which authorities have been notified of the incident. • Flag the incident.
Involvements
Persons
• Identify all persons involved in the incident. • Record injuries sustained during the incident. • Record an involved person's clothing details. • Flag an involved person. • Add losses, recoveries, or potential no impact losses associated with an involved person, and review their summary.
Organizations
• Identify all organizations involved in the incident. • Note an action request sent to an organization. • Log organization response details. • Add losses, recoveries, or potential no impact losses associated with an involved organization, and review their summary.
Vehicles
• Document all vehicles involved in the incident. • Add losses, recoveries, or potential no impact losses associated with an involved vehicle, and review their summary.
Items
• Identify all items involved in the incident. • Add losses, recoveries, or potential no impact losses associated with an involved item, and review their summary.
Narratives
• Add procedure summaries (e.g., Executive Summary, Follow-up, or Interview) to the

Incident record.
Attachments
• Attach a file to the Incident record.
Links
• Link the incident to another incident. • Link the incident to a case (Perspective ICM and EIM only). • Link the incident to an activity.
Losses
• Record losses (i.e., Losses, Recoveries, and No Impact losses) involved in an incident. • View a summary of losses involved in the incident.
Investigation (ICM and EIM only)
Details
• Open a new incident investigation. • View a summary of the incident's key investigative data. • Assign an investigator to the incident's investigation.
Summaries
• Summarize the incident's investigation.
Logs
• Log investigative tasks and expenses for the incident.
Interviews
• Document investigation interviews for the incident.
Evidence/Property
• Track investigation evidence for the incident, including the evidence chain of custody.
Controls
Details
• Set security controls and status of the Incident record. • Define which workgroups can access the Incident record.
Outcome
• Describe the incident's causes and subsequent policy changes or corrective actions.

Reviews
• Document an incident-related review.
Assignments
• Give an incident-related assignment to another user.
Audit History
• View the history of all changes made to the Incident record. Visibility of Audit History depends on user permissions.

Cases Form (Perspective ICM and EIM Only)

Use this form to record the details of a case, track the progress of its investigation, and access information on its linked incidents. Every Case record is given a unique number so it is easy to find, identify, and organize. Before creating a new record, do a record search to ensure that the information has not already been entered.

Cases Form

General
• Create a new Case record. • Assign an investigator to the case's investigation. • View a quick summary of the case's key data.
Involvements
Persons, ***Organizations***, ***Vehicles***, and ***Items***
• View all persons, organizations, vehicles, or items involved in the case's linked incidents.
Narratives
• Summarize the case or an incident linked to the case.
Attachments
• Attach a file to the case or an incident linked to the case.
Links
• Link the case to an incident. • Link the case to another case.
Losses

• View a summary of losses, recoveries, and no impact losses involved in the case's linked incidents.
Investigation
Details
• View key investigative data from the case's linked incidents.
Summaries
• Summarize the case's investigation or the investigation of an incident linked to the case.
Logs
• Log investigative tasks and expenses for the case or an incident linked to the case.
Interviews
• Document investigation interviews for the case or an incident linked to the case.
Evidence/Property
• Track investigation evidence for the case or an incident linked to the case.
Controls
Details
• Set the security controls and status of the Case record. • Define which workgroups can access the Case record.
Reviews
• Document a case-related review.
Assignments
• Give a case-related assignment to another user.
Audit History
• View the history of all changes made to the Case record. Visibility of Audit History depends on user permissions.

Items Form

Use this form to record the details of an item. Before creating a new record, do a record search to ensure that the information has not already been entered.

Items Form

General
• Create a new Item record.
History
• View the incidents the item has been involved in. • Add an incident associated with the item into a case.
Attachments
• Attach a file to the Item record.
Controls
Details
• Set security controls for the Item record. • Define which workgroups can access the Item record.
Audit History
• View the history of all changes made to the Item record. Visibility of Audit History depends on user permissions.

Persons Form

Use this form to record the details of a person. Every person, from general maintenance users to suspects and officers, must have their own record. Records can be created for persons who have the same name, as well as for persons who are unknown. Before creating a new record, do a record search to ensure that the information has not already been entered.

Persons Form

General
• Create a new Person record. • Note the person's unique features or distinguishing marks. • Record the person's identification details. • Document the person's trespass details. • Flag the person.
Contact(s)
• List the person's known addresses, phone numbers, and email addresses.
Links
• Link the person to another person. • Link the person to an organization. • Link the person to a vehicle.
History
• View the incidents the person has been involved in. • Add an incident associated with the person into a case.
Attachments
• Attach a file to the Person record.
Controls
Details
• Set security controls for the Person record. • Define which workgroups can access the Person record.
Audit History
• View the history of all changes made to the Person record. Visibility of Audit History depends on user permissions.

Organizations Form

Use this form to record the details of an organization. Before creating a new record, do a record search to ensure that the information has not already been entered.

Organizations Form

General
• Create a new Organization record.
Contact(s)
• List the organization's known addresses, phone numbers, and email addresses.
Links
• Link the organization to a person. • Link the organization to another organization. • Link the organization to a vehicle.
History
• View the incidents the organization has been involved in. • Add an incident associated with the organization into a case.
Attachments
• Attach a file to the Organization record.
Controls
Details
• Set security controls for the Organization record. • Define which workgroups can access the Organization record.
Audit History
• View the history of all changes made to the Organization record. Visibility of Audit History depends on user permissions.

Vehicles Form

Use this form to record the details of a vehicle. Before creating a new record, do a record search to ensure the information has not already been entered.

Vehicles Form

General
• Create a new Vehicle record.
Links
• Link the vehicle to a person. • Link the vehicle to an organization. • Link the vehicle to another vehicle.
History
• View the incidents the vehicle has been involved in. • Add an incident associated with the vehicle into a case.
Attachments
• Attach a file to the Vehicle record.
Controls
Details
• Set security controls for the Vehicle record. • Define which workgroups can access the Vehicle record.
Audit History
• View the history of all changes made to the Vehicle record. Visibility of Audit History depends on user permissions.

Common Record Functions

Although most data entry operations are specific to the individual data forms and will be described under the corresponding sections (e.g., Incidents, Activities, Items), some functions are identical for a number of data forms, and these will be described only once and then cross-referenced throughout this guide. For instance, as you proceed through the Case data form, you will notice that procedures for some operations for cases are identical to the ones that are available for incidents. Whenever this is so, the "Cases" section will provide cross-references to the relevant chapters in the “Incidents” section instead of the full descriptions of the corresponding operations.

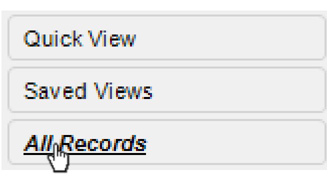
The common record functions/forms include the following:

- Recording related contact information (the **Contact(s)** tab).
- Specifying all involvements of an occurrence (the **Involvements** tab).
- Reviewing related record’s involvements (the **History** tab).
- Linking a record to another record (the **Links** tab).
- Attaching a file to a record (the **Attachments** tab).
- Setting major record’s control options (the **Controls** tab).
- Auditing the changes made to a record (the **Audit History** tab).
- Merging records’ duplicated data (the **Merge** button).

Manage Record Views

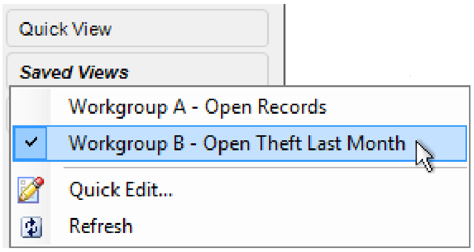
Display All Records in the Listing Pane

1. In the Navigation pane, choose the record entity you intend to work on (e.g., Incidents).
2. To display all of the entity’s records in the Listing pane, with no filters applied, click **All Records**.



Access a Saved Record View

1. In the Navigation pane, choose the record entity you intend to work on (e.g., Incidents).
2. Click **Saved Views** and select the particular record view that you want to access.
    - The record view will now appear in the Listing pane.



Create and Save a New Record View

1. In the Navigation pane, choose the record entity you intend to work with (e.g., Incidents).

2. In the view menu, click **Quick View**.

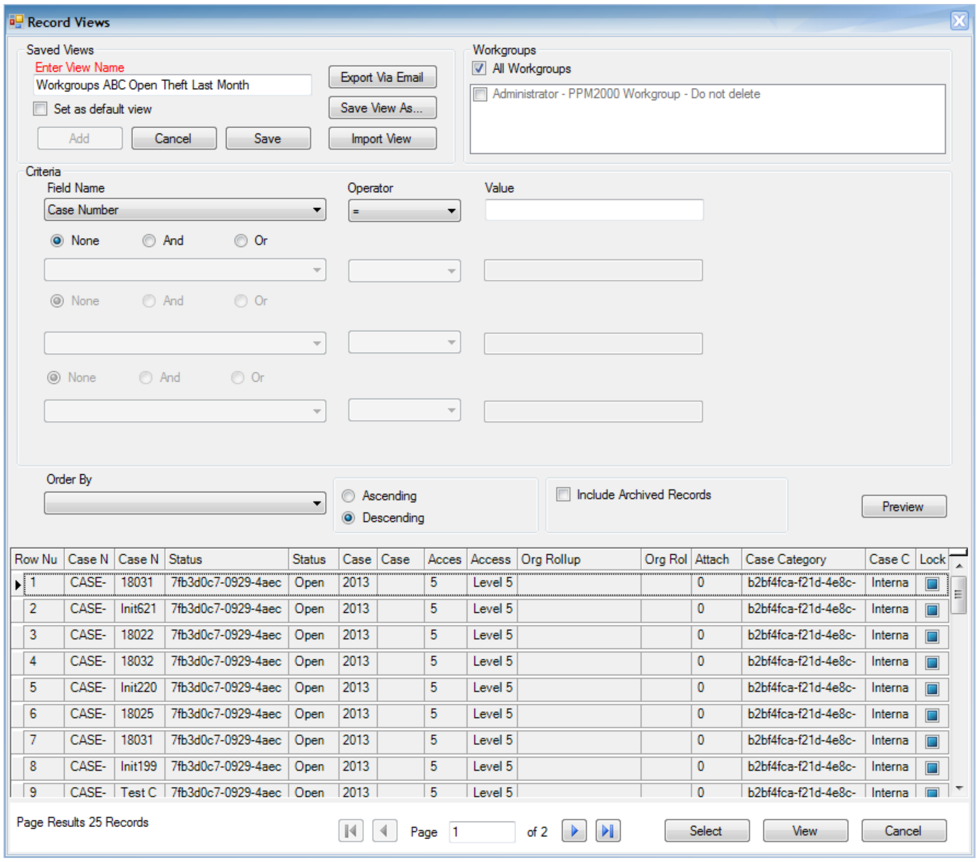
   - The Record Views window will open. This is where you specify the parameters of your record view.

3. Click the **Add** button in the Saved Views section.

4. Type a name for your customized view in the active **Enter View Name** field.

5. Customize your desired view starting with the **Workgroups** section.

   - By default, the All Workgroups box is checked to include records for all workgroups in your customized view. If you want to restrict your view to the records of a particular group, uncheck the All Workgroups box and proceed to select the desired workgroups.



6. Specify the **Criteria** for your view:

   a. In the top **Field Name** lookup list, select the field that you want to set as the main criterion for narrowing your record view.

   b. Choose an **Operator** for the field (e.g., "*equal*" (**=**), "*greater than*" (**>**), "*less than or equal to*" (**<=**), "*starts with*", "*like*").

   c. Enter the compared criterion Value. If the **Selector** button is available, click it to display a tree of Value options in a separate window. For example, if you are creating a Saved View of Incident records and your chosen Field Name is Access Level, you may select an Operator of "*equal*" (**=**) and a Value of Level 2, in order to restrict your view to only those records with an Access Level 2.

   Note: You may choose any node of the tree as the defining criterion, making your comparison value as narrow hierarchically as you want. For example, when specifying a Value for the Class Rollup, you may select any node in the Class Rollup hierarchy, ranging from the broadest category values, like "Criminal", to the narrowest sub-class type values, like "Company Property/Over $1000".

If you choose to select a date field in the Field Name lookup list, you have the option of using a floating date (e.g., Yesterday), rather than a fixed date to narrow your record view by. The **Floating Date** checkbox is only visible once a date field has been selected. For example, if you want your view to display incident activity that occurred during a floating period of a previous month, choose "Occurred From Date/Time" as Field Name, "*equal*" (**=**) as the Operator, and then check the Floating Date box and select "Previous 30 Days" as your Value.

d. If you want to include an additional field in your record view criteria, select the **And** or **Or** radio buttons and complete the Field Name, Operator, and Value fields below. You may include up to four fields in your record view criteria.

   To specify a static date range, specify two temporal criteria (e.g., one for the "*greater than*" *(***>**), and one for the "*less than or equal to"* (**<=**) Operator), using the **And** logic between them to combine the criteria into a set date range.

7. Choose a display order for your record view by selecting a field from the **Order By** lookup list (e.g., order records by Incident Number, Access Level, Status).

8. Select either the **Ascending** or **Descending** radio button to further define the record order.

   - The ascending radio button lists the records according to the chosen Order By field in alphabetical order, or from lowest number to highest. The descending radio button lists the records according to the selected Order By field in reverse alphabetical order, or from highest number to lowest.

9. Include archived records in your record view by checking **Include Archived Records**.

10. Click the **Preview** button to generate a list of records meeting your set criteria in the order specified.

    - The number of records found will be provided under Page Results.

11. To quickly view a particular record in read-only mode, select the record in the Preview list and click **View**.

    - A separate window will open with the record details displayed.

12. If you want to save the record view for future use, complete the **Saved Views** section. Otherwise, proceed to the next step. Perspective provides three saving options for your newly created view:

    - To save your record view for future use in Perspective, click Save. Your newly-created record view will now be available under the Saved Views menu.
    - If you want to set this customized view as your default view (the record view that will automatically load each time you enter this data form), click the Set as default view box, and click Save again.

- To save your record view as an XML or TXT file, click Save View As and select the location for the export. The record will be assigned an automatically generated number.

13. To return to the Data Forms window and transfer your record view to the Listing pane, click the **Select** button.

14. Click on a record in the Listing pane to display it in the Viewing pane.

    - If you clicked on a particular record in the Record Views window prior to clicking Select, the record will be highlighted in the Listing pane and will already be opened in the Viewing pane.

Edit an Existing Record View

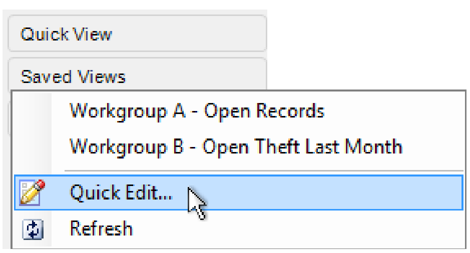
1. In the Navigation pane, choose the record entity you intend to work on (e.g., Incidents).

2. Expand the **Saved Views** menu.

3. Select **Quick Edit**. The Record Views window will open.

4. If you have not yet opened a saved record view and your Listing pane is blank, select an existing view you want to edit under the **Saved Views** menu.

    - Its settings will be displayed. However, if your Listing pane displays a selected record view, the Record Views window will open with the active record view's parameters displayed.



5. Modify the parameters as required. For options, see the "Create and Save a New Record View" section in the current chapter.

6. To save the view replacing the parameters previously set, click **Save**.

    To save the modified record view as a new view, complete the Saved Views section, as follows:

    a. Click **Add**. A pop-up will appear asking you if you want to clear the current view criteria.

    b. Click **No** to save the criteria specified. If you click Yes, the view will be reset to its original settings.

    c. Type a name for your edited view in the active **Enter View Name** field. This way, when you save your new view, it will not overwrite the original view.

d. Click **Save**. Your newly-created record view will now be available in the Saved Views menu.

If you do not want to save the modified view, proceed to the next step.

6. To return to the Data Forms window and transfer your record view to the Listing pane, click the **Select** button.

7. Click on a record in the Listing pane to display it in the Viewing pane.

   - If you clicked on a particular record in the Record Views window prior to clicking Select, this record will be highlighted in the Listing pane and will already be opened in the Viewing pane.

> If you opened an existing view in the Listing pane, made changes to it, saved it, and then re-opened the modified view, you may need to click the **Refresh** button in the **Saved Views** menu to refresh the view of your Listing pane with the new settings.

Import a View

1. In the Navigation pane, choose the record entity you intend to work on (e.g., Incidents).

2. Click **Quick View** in the Navigation pane.

3. In the Record Views window, click the **Import View** button and browse for the file that contains the view in XML or TXT format that you want to import.

   - Once you import the view, its settings will be displayed.

4. Optionally, modify the parameters of the newly imported view and/or save them under a new view name. For editing and saving options, please see the "Create and Save a New Record View" section in the current chapter.

5. Click the **Select** button to transfer your record view to the Listing pane.

6. Click on a record in the Listing pane to display it in the Viewing pane.

   - If you clicked on a particular record in the Record Views window prior to clicking Select, this record will be highlighted in the Listing pane and will already be opened in the Viewing pane.

Email a Record View

1. In the Navigation pane, choose the record entity you intend to work on (e.g., Incidents).

2. Click **Quick View** in the Navigation pane.

3. In the Record Views window, specify the settings of a new record view and save them, as described above, or select an existing view you want to email in the **Saved Views** menu.

4. Click the **Export Via Email** button.

    - A Send Message window will open with your view specifications formatted as an XML attachment.

5. Edit the text of the original message, review attachments, and set the message priority, as needed.

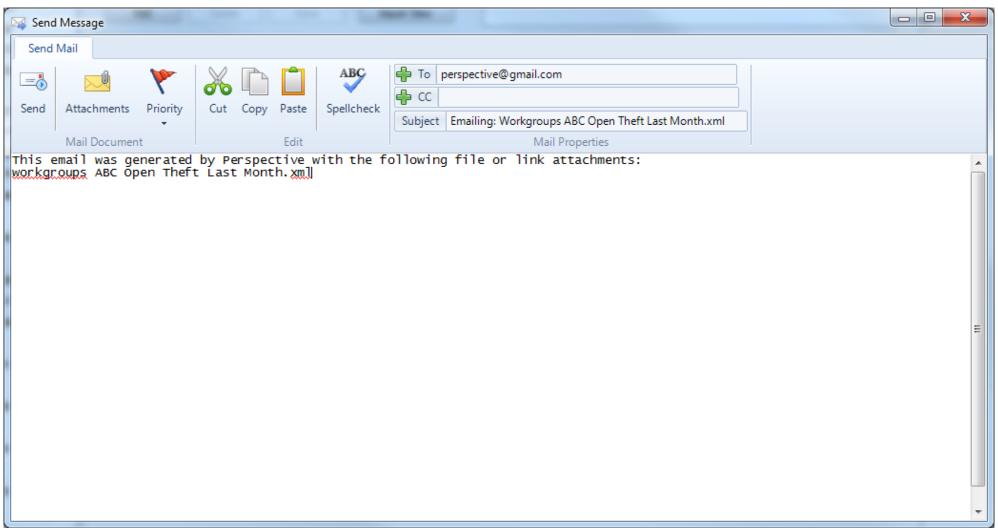
6. Specify the recipient's email address.

7. You may type in a recipient's email address directly into the To and/or CC fields, or import a contact from Perspective's database by clicking To and/or CC and selecting a person from the displayed Entity List.

    - The Entity List will be populated with user records that contain an email address with the **Primary Email** box checked.

8. Click **Send**.

9. Close the Record Views window to return to the Data Forms window.



Delete a Record View

1. In the Navigation pane, choose the record entity you intend to work on (e.g., Incidents).

2. Expand the Saved Views menu

3. Click **Quick Edit**. The Record Views window will open.

4. If you have not yet opened a saved record view and your Listing pane is blank, select an existing view you want to edit under the **Saved Views** menu.

    - Its settings will be displayed. However, if your Listing pane displays a selected record view, the Record Views window will open with the active record view's parameters displayed.

5. Click the **Delete** button.

6. In the Delete confirmation box, click **Yes**.

7. Close the Record Views window to return to the Data Forms window.

Select a Record From the List

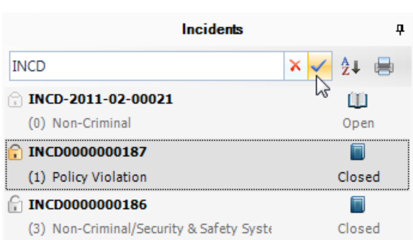
If the record database displayed in the Listing pane exceeds three pages, you may consider further filtering the record list using the following sorting options:

- Use the **A to Z** sorting icon located at the top of the Listing pane to switch the record list view in the Listing pane between the ascending and the descending alphanumeric order.

  Note: If you are using a Quick View or a Saved View and want to re-sort your records list, you must use the Order By and Ascending/Descending options available in the Record Views window.

- If you know a part of the name or number of the required record(s), enter a string of alphanumeric characters in the filter field at the top of the Listing pane. Since this function only filters text in the record name (e.g., the incident number, person name, vehicle license plate number), the filter string must correspond to a supposed part of the record number that you require (e.g., INCD00 or 18 for the record numbers INCD00000187, INCD00100185). To apply the filter, click the **checkmark** icon . To remove the filter, click the clear icon and then the checkmark icon, to view the original list.

- Use the visual cues provided for each record entry to select the record that best suits your needs. In the Listing pane, records are displayed as either **locked from editing** , **unlocked from previous locking** , or as **unaltered** , the latter meaning that the record has never been locked before. The number of files attached to a record is displayed in parentheses. The status of the record may be displayed as either "Closed" or "Open". Drawn from the Controls tab, a record's "Closed" status generally means that the record has been processed up to a point where no further action is required. By default, records are created as "Open".



Once you have found the record you would like to work with, click on the record entry in the Listing pane to display it in the Viewing pane.

Note: If you clicked on a particular record in the Record Views window prior to clicking Select, this record will be highlighted in the Listing pane and will already be opened in the Viewing pane.

Enter and/or Edit Record Data

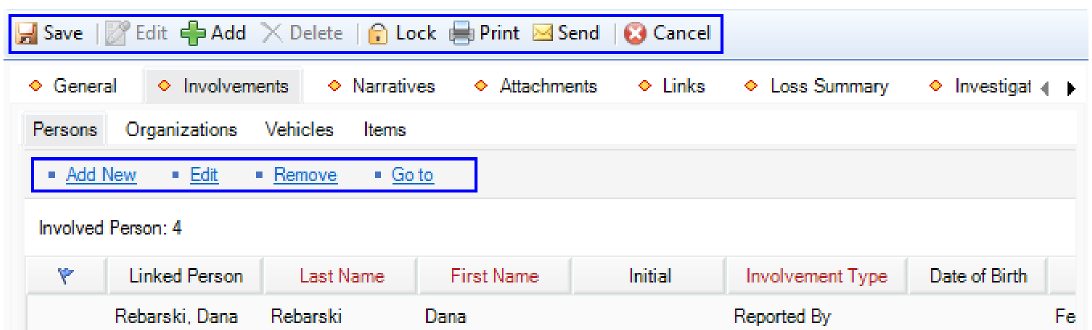
Depending on the data form that is currently open and on your user privileges, a variety of buttons are available on the Viewing pane toolbar, allowing you to perform a number of record functions.

Viewing Pane Toolbar

Save	Saves changes made to a record.
Edit	Switches a record into the "edit" mode. After clicking Edit, select the field you want to edit and make the necessary change.
Add	Creates a new record from scratch.
Delete	Removes an entire record from the database.
Lock	Bars a record from editing.
Unlock	Makes a record available for editing. (This button will only appear if the record is currently locked.)
Print	Prints, displays, or saves the PDF copy of a record in the report form. After clicking Print, specify which part of the report you would like to print. On the Report Visibility form, specify which record sections you would like included in the report and whether you want to download attachments, and then click OK. Finally, choose to either view a printable copy of the report (Open) or save a copy of the report to the location of your choice (Save).
Send (Activity, Incident, and Case forms only)	Emails record details. After clicking Send, a new email window will open with general record details included in the body of the message. To format the message details in plain text rather than the default HTML table, click the **Format** icon. Specify the user or email address you would like the message to be delivered to, review the message details, and click **Send**. For further details on operating the Send Message editor, consult "Appendix B: Text Editor Navigation" at the end of this guide.

Merge (Items, Persons, Organizations, and Vehicles forms only)	Merges partially duplicate records that correspond to a single physical referent that is an item, a person, an organization, or a vehicle. The function is represented by the Merge Items, Merge Persons, Merge Organizations, and Merge Vehicles buttons on the respective Viewing pane toolbars. For details on merging of records, see the "Merge Records" section.
Cancel	Switches the record from "edit" to "read-only" mode without saving changes.
Audit	To find out who created the record (Created By) and who last modified it (Last Modified), click the record's top shield icon. To access similar information for one of the record's entities (e.g., a specific Narrative or an Involved Person entry), select the appropriate entity in the grid and hover your mouse over the bottom shield icon. You may also click the icon to view the information in a pop-up window with added detail.

Some tabs consist of sub-tabs for further grouping of the data contained within. Whenever data in tabs is further subdivided into sub-tabs, Perspective enables editing of the sub-tabbed data (e.g., Involved Persons) with an additional sub-tab-specific toolbar. The quantity and the names of the functions included in this toolbar vary depending on the type of information contained in the sub-tab, although they may be similar to the ones performed by the buttons included in the Viewing pane toolbar.

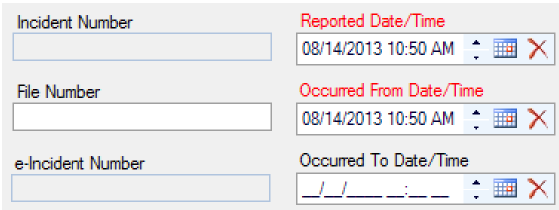


To start editing details inside the record, you have to first put the record into the "edit" mode by clicking **Edit** on the Viewing pane toolbar. Then, to apply changes to a record's entity (e.g., an Involved Person), select the entity in the grid and use the functions displayed in the sub-tabbed toolbar. The following table presents the common functions that are available in all data form types (the rest of the buttons that you may encounter in a sub-tabbed toolbar will be discussed in sections that describe the specific entities in detail).

Common Data Form Functions

Edit	Opens a pop-up form that contains the data of the entity. Make necessary changes to the fields (or plain text) in the form and click OK (or Accept & Return) to return to the main record.
Add New	Creates a new entity within a record (e.g., a new Involved Person entity).
Remove	Removes an entity within a record (e.g., an invalid Involved Person entity).
Go To	Opens an entity's corresponding record, typically, in a different data form component. For example, "going to" the Involved Person entity involves opening the associated editable Person record in the Persons component of Perspective. In order to return the original data form (i.e., Incidents), select the required component from the Navigation pane. The views of both forms will be preserved.
Read/View	The Read and View options function similarly to Go To, with the only difference being that they open the entity in a read-only mode, where you may be able to zoom its contents, and/or print it, but not edit it. View allows an attachment to be saved to your computer, or opened and viewed in an appropriate application (i.e., an attached .doc file would open in Microsoft Word). You may scroll through the other entities of the same type (e.g., narratives, investigation summaries), without leaving the pop-up window, using the Previous and Next buttons.
Seal/Unseal	Removes/restores editing rights from/for an entity. *Note: Once you seal the entity, and then save and leave the corresponding record, it can never be unsealed. A new entity must be created in order to record amendments to the original one. Even if an entity is left unsealed, the Author is the only user authorized to edit the entity, unless special privileges have been granted to another user to do so. (If this button is not visible to you, your Administrator has not granted you the right to seal entities.)*
History	To see the history of incidents in which a particular case-involved person, organization, vehicle, or item has been involved, select the entity of interest in the grid and click History. A new window will appear that displays a table of the entity's involvement in the incidents stored in your organization's Perspective database. For further details, see the "View All Case's Involvements" section. *Note: The Case component is available in Perspective ICM and EIM only.*

In a new data form, field with red titles are required to be completed (Figure 3.2.9). If you save the record before completing all required fields, the system will display a system message requesting completion of these fields. To see the classification and navigation of the available field types, see "Appendix C: Data Field Types" at the end of the guide.



Note: Your organization's data forms may contain additional fields, the so-called "User Defined Fields". Usually, they appear under a separate like-named section. These fields will require entering additional pieces of information that may not be covered in this guide.

Incidents

Create a New Incident Record

Note General Details of the Incident

1. Click the **Add** button  in the Viewing pane toolbar.

    - Perspective will automatically assign an Incident Number when the record is saved. The e-Incident Number field is reserved for electronic reports that have been accepted from the Gateway into Perspective. Once the report is accepted as a valid Incident record, it is automatically assigned a new Perspective Incident Number, while its original e-Incident Number is preserved for cross-referencing purposes.

2. If applicable, input a file or reference number under **File Number**.

3. Indicate when the incident was reported to supervisors under **Reported Date/Time**.

4. Note when the incident began under **Occurred From Date/Time** and when the incident ended under **Occurred To Date/Time**.

    - The Incident Duration will automatically be calculated when the record is saved.

5. Identify the incident's classification using the **Class**, **Category**, **Subcategory**, and **Type** lookup lists.

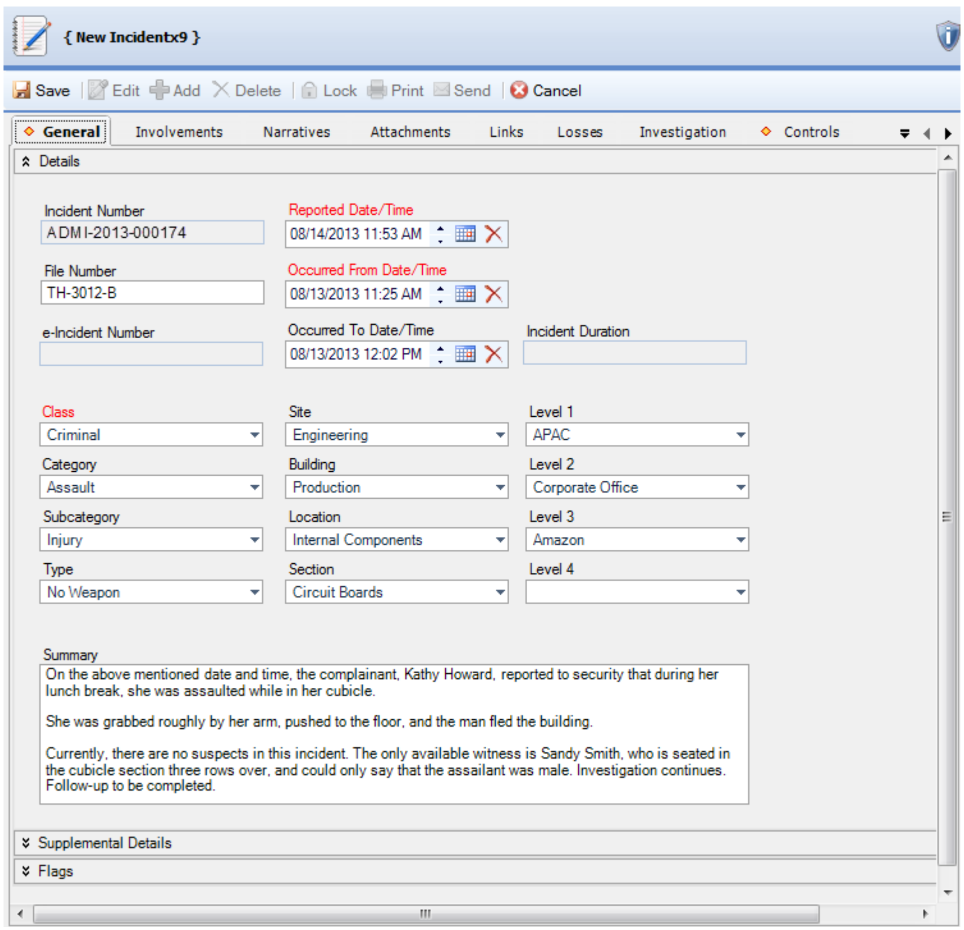
    - These fields are hierarchical, meaning that the option selected in the first field (i.e., Class) determines the options that are available in the second field (i.e., Category) and so on. The options that appear in these lists have been customized by your organization.

- Specify where the incident occurred by making selections from the **Site**, **Building**, **Location**, and **Section** lookup lists.
- Like the fields in the incident's classification section, these fields are hierarchical.

6. Identify which business unit the incident affected by selecting options from the **Level 1** to **Level 4** lookup lists, if applicable.

7. Type a brief overview of the incident in the **Summary** box.

   - To enter a more detailed description of the incident, outline the sequence of events under the Narratives tab.



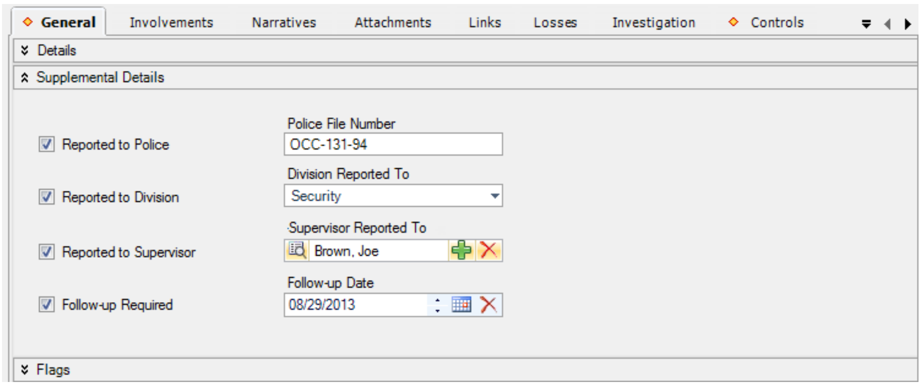
Indicate Which Authorities Have Been Notified of the Incident

1. In the Supplemental Details section, check the **Reported to Police** box if the police have been notified of the incident, and then input the **Police File Number**.

2. If another division in your organization has been notified of the incident, check the **Reported to Division** box and specify the **Division Reported To**.

3. If you reported the incident to your supervisor, check the **Reported to Supervisor** box. Then, select the name of your supervisor from the **Supervisor Reported To** pick list. If no relevant Person record is found in the database, use the Quick Add function to create one.

4. If the incident requires follow-up, check the **Follow-up Required** box and enter the **Follow-up Date**.

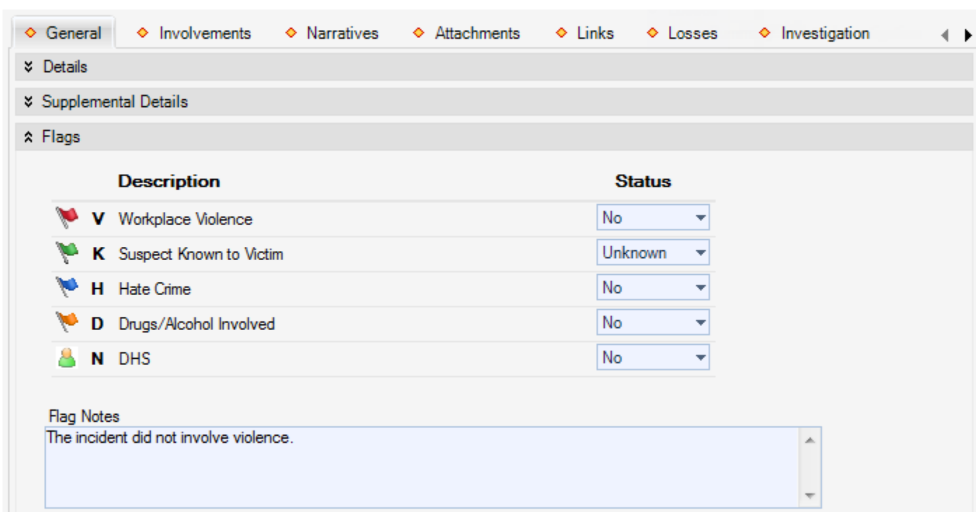


Flag the Incident

1. In the Flags section, select each flag's **Status** (i.e., Yes, No, or Unknown), depending on whether or not the flag applies to the incident.

   - Examples of flags include Hate Crime, Drugs/Alcohol Involved, and Weapon Involved.

2. Add any applicable notes under **Flag Notes**.



Identify All Involved Persons

Note General Details of an Involved Person

1. Select the **Involvements** tab.

2. Select the **Persons** sub-tab.

3. Click **Add New**. A pop-up window will open.

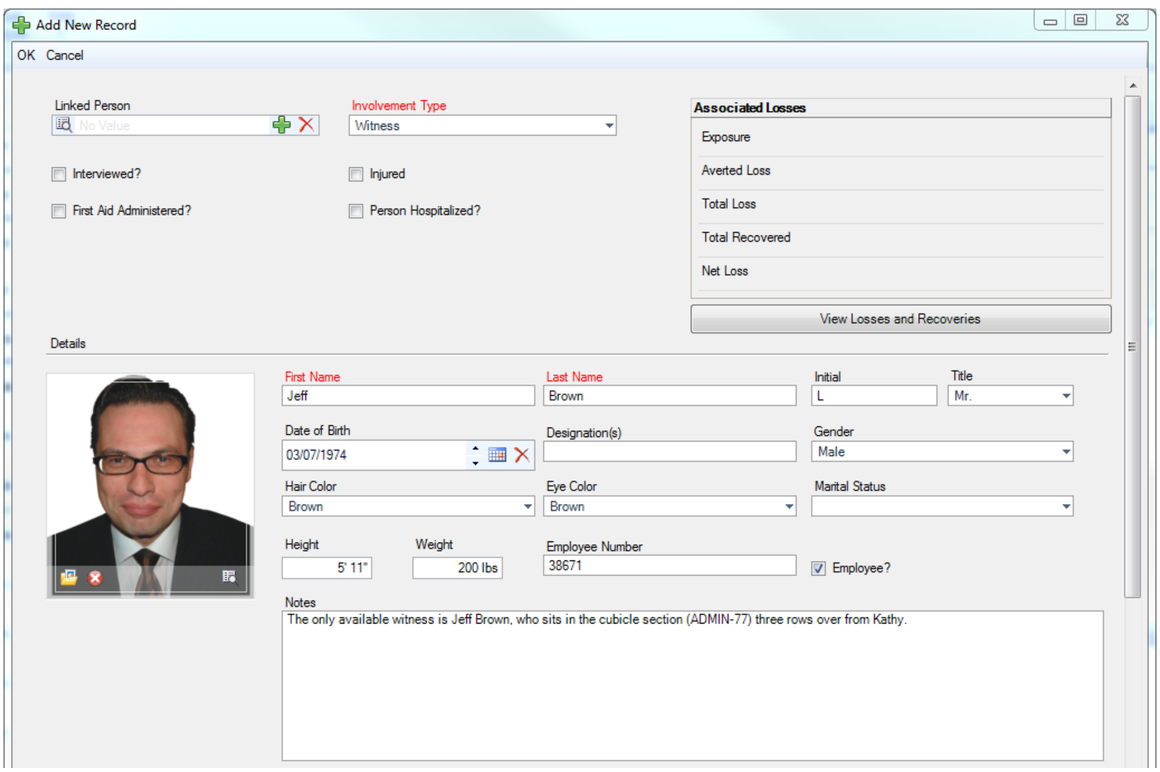
4. Select the involved person's record from the **Linked Person** pick list. If a Person record does not already exist for this individual, use the Quick Add function to create one.

    - The First Name and Last Name fields will now automatically populate with the linked person's name. Depending on the data available, some additional fields may also populate with information drawn from the linked person's record.

5. From the **Involvement Type** lookup list, choose the appropriate description.

6. Enter the person's **Initial**, **Title** (e.g., Mr.) and **Designation** (e.g., Chartered Accountant).

7. Specify the involved person's **Date of Birth**, **Gender**, and **Marital Status**.



8. Identify the person's physical characteristics, including **Hair Color**, **Eye Color**, **Height**, and **Weight**.

9. If the person is an employee of your organization, check the **Employee?** box and enter the **Employee Number**.

10. If the person was interviewed regarding the occurrence, check the **Interviewed?** box.

11. If the person received first aid, or was injured or hospitalized as a result of the occurrence, check the **First Aid Administered?**, **Injured**, and/or **Person Hospitalized?** boxes.

12. Enter notes about the person's involvement in the occurrence in the **Notes** text box.

13. To add a photo of the involved person to the record, click the **Add** icon in the image box.

14. Locate the image file in the browser window and click **Open**.

Add the Involved Person's Clothing Details

1. Open the **Click to Add Clothing Details** link.

2. Choose the **Clothing Type** and **Color** from the lookup lists.

3. Enter a detailed description of the item in the **Description** box.

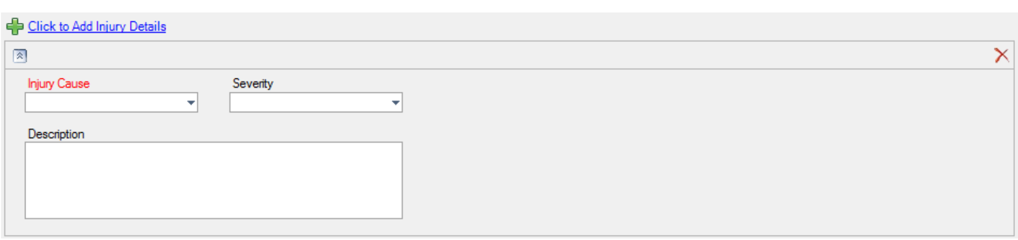
4. Repeat for as many articles of clothing as necessary.

Record the Involved Person's Sustained Injuries

1. Open the **Click to Add Injury Details** link.

2. Specify the **Injury Cause** and **Severity**.

3. Include a detailed description of the injury in the **Description** text box.



4. Repeat for as many injury entities as necessary.

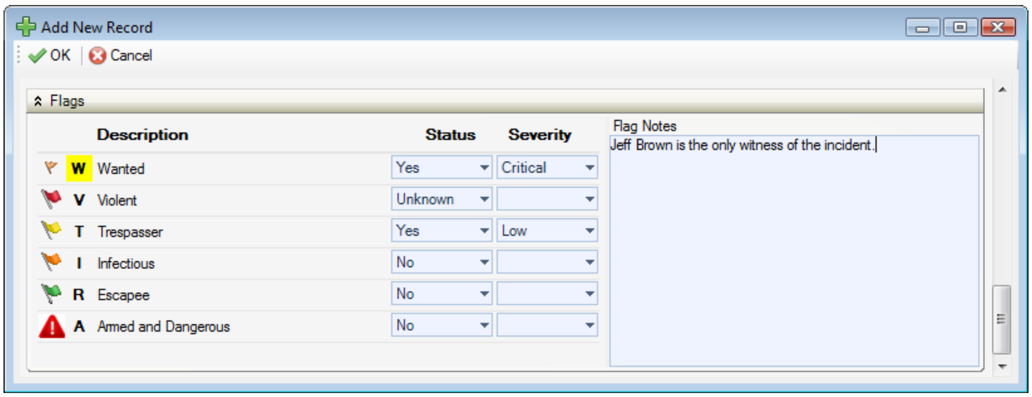
Flag the Involved Person

1. In the Flags section, specify the **Status** (i.e., Yes, No, or Unknown) as well as the **Severity** of each flag (e.g., Critical, High, Low).

    - Flags may include such descriptions, as Trespasser, Violent, Infectious, Escapee, Wanted, etc.

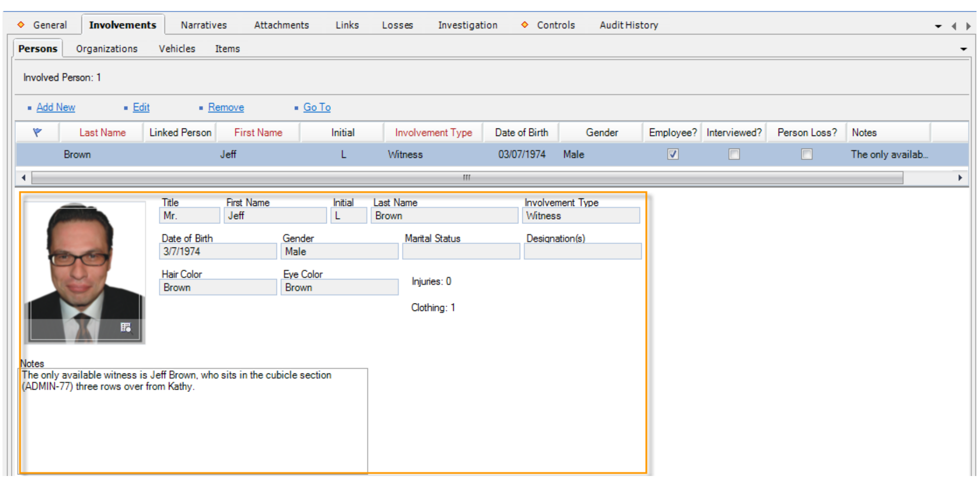
2. Enter comments in the **Flag Notes** section.

3. Click **OK**.



4. As you click OK, the newly created entity will be displayed in the Involved Persons list, each entity occupying a single row in the list.

    - To display the entity's general information in the bottom Viewing pane, select the corresponding row in the list.

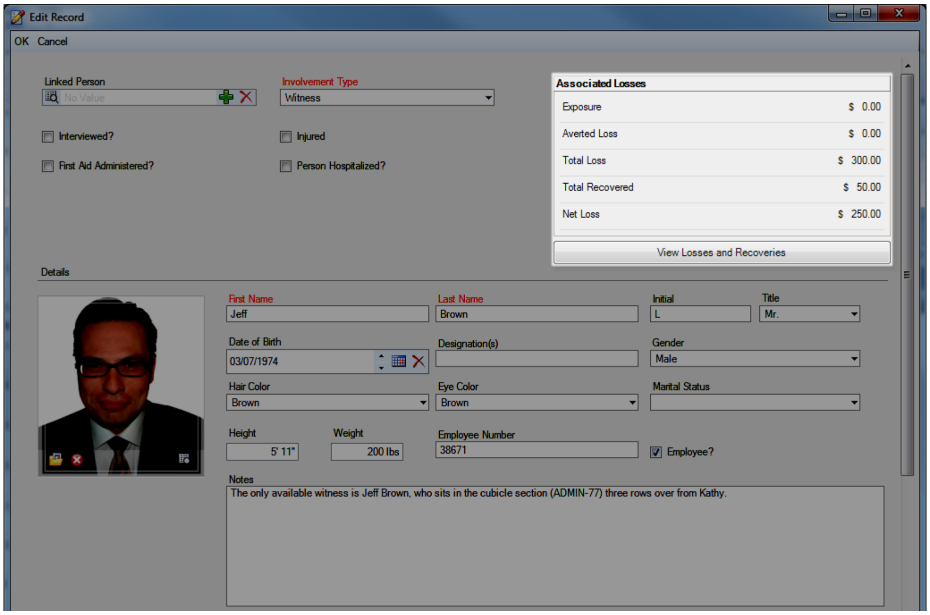


Add Losses and Recoveries Associated with an Involved Entity

1. Before you continue with entering losses or reviewing their summary, make sure that you saved the involved entity's sub-record by clicking **OK** and that you saved the Incident record by clicking **Save**. This will update the calculations the system stores on the previously recorded losses.

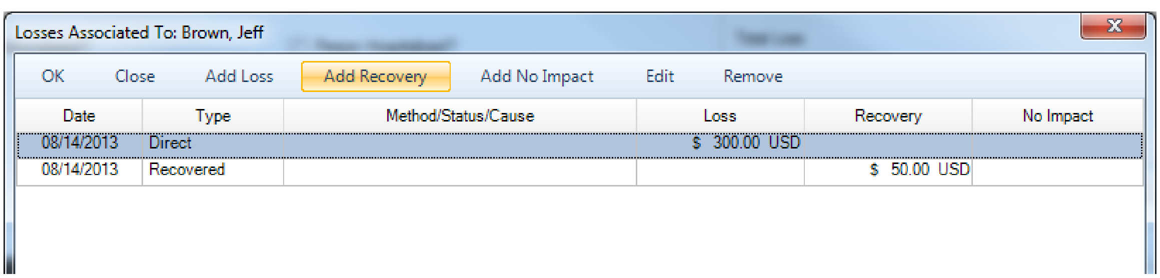
2. Double-click the involved entity in the list that you want to associate a loss with (e.g., the Jeff Brown's Person record).

   - In the **Associated Losses** section in the top right corner you will see the summary of the losses previously associated with the open entity, including a summary of the entity's recovery (**Exposure** and **Averted Loss**), **Total Loss**, **Total Recovered** loss, and **Net Loss**.



3. To review the details of the losses associated with the entity, click on the **View Losses and Recoveries** button under the **Losses Associated To** summary grid.

   - A new window will open where you will be able to see the **Date** a loss was recorded, the **Type** of the loss, the **Method**/**Status**/**Cause** the loss was or could have incurred, and the relevant value of the loss.



4. To add a loss, select one of the following three options:

   - To add a loss that has occurred, click **Add Loss**.

   - To add a loss that has occurred and has been recovered, click **Add Recovery**.

- To add a potential exposure loss or an averted loss that is associated with the involved entity, click **Add No Impact**.

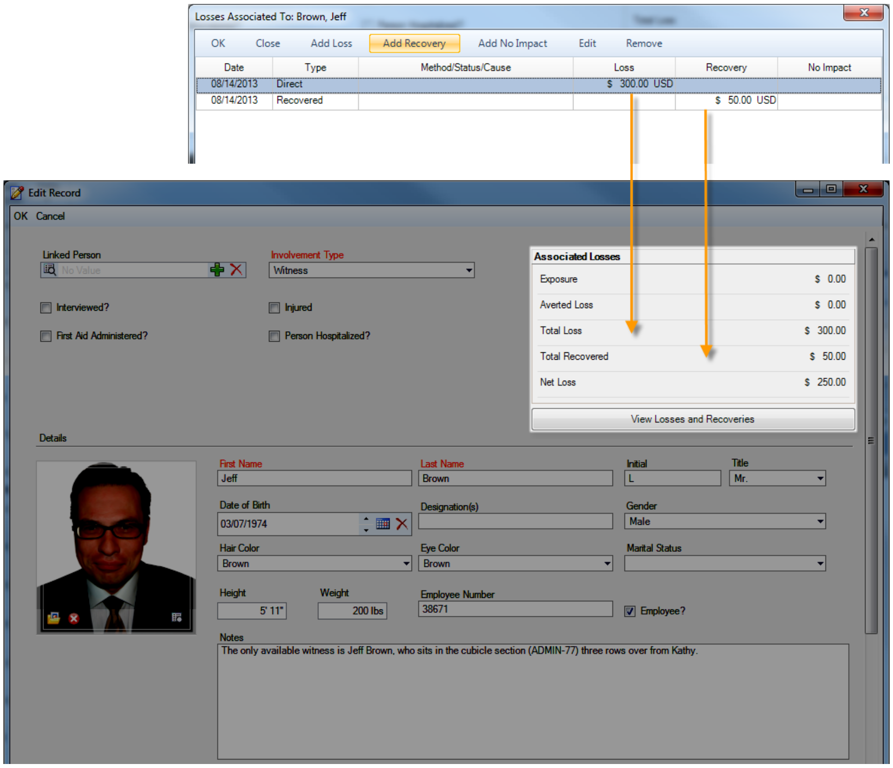
5. Depending on the option you choose, a new screen will display a subform designed for the type of loss you selected. Fill out the form's fields following the guidelines in the "Record Losses Involved in an Incident and View Their Summary" section.

6. Click **OK**.

    - Once the changes are saved, the recorded loss data will populate the relevant columns of the **Losses Associated To** grid.

7. Add as many loss entries as necessary, repeating steps 4 **-** 6. Then, click **OK** to save the associated losses on the involved entity's record and see updated summary calculations in the **Associated Losses** section of the subform:

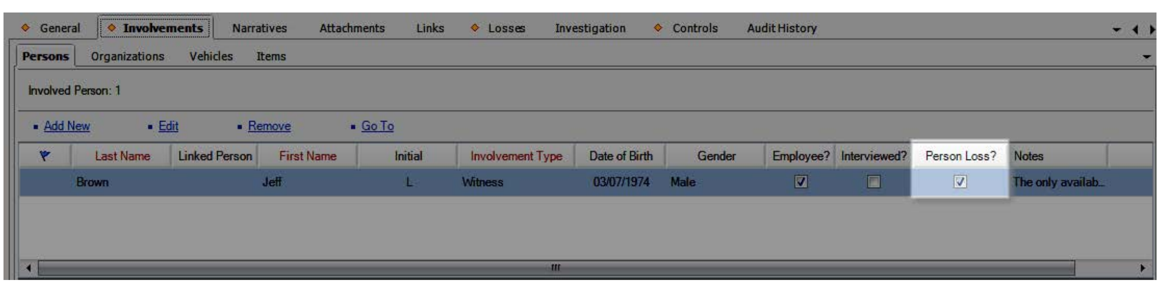
    - **Exposure**: The total value of the Exposure No Impact loss associated with the involved entity.
    - **Averted Loss**: The total value of the Averted No Impact loss associated with the involved entity.
    - **Total Loss**: The total value of the Loss amounts associated with the involved entity.
    - **Total Recovered**: The total value of the Recovery loss associated with the involved entity.
    - **Net Loss**: The value determined by subtracting the Total Recovery amount from the Total Loss.



8. Click **OK** on the main involved entity's subform.

   - The entity's entry in the list will be updated with a checkmark under the **Person**/**Organization**/**Vehicle**/**Item Loss?** Column. The loss will also be recorded as a separate entry under the **Losses** tab.

9. Click **Save** to synchronize the recorded data across the Perspective's components.



Identify All Involved Organizations

Note General Details of an Involved Organization

1. Select the **Involvements** tab.

2. Select the **Organizations** sub-tab.

3. Click **Add New**. A pop-up window will open.

4. Select the involved organization's record from the **Linked Organization** pick list. If an Organization record does not already exist, use the Quick Add function to create one.

   - The **Organization Name** field will now automatically populate with the linked organization's name. Depending on the data available, some additional fields may also populate with information drawn from the linked Organization record.

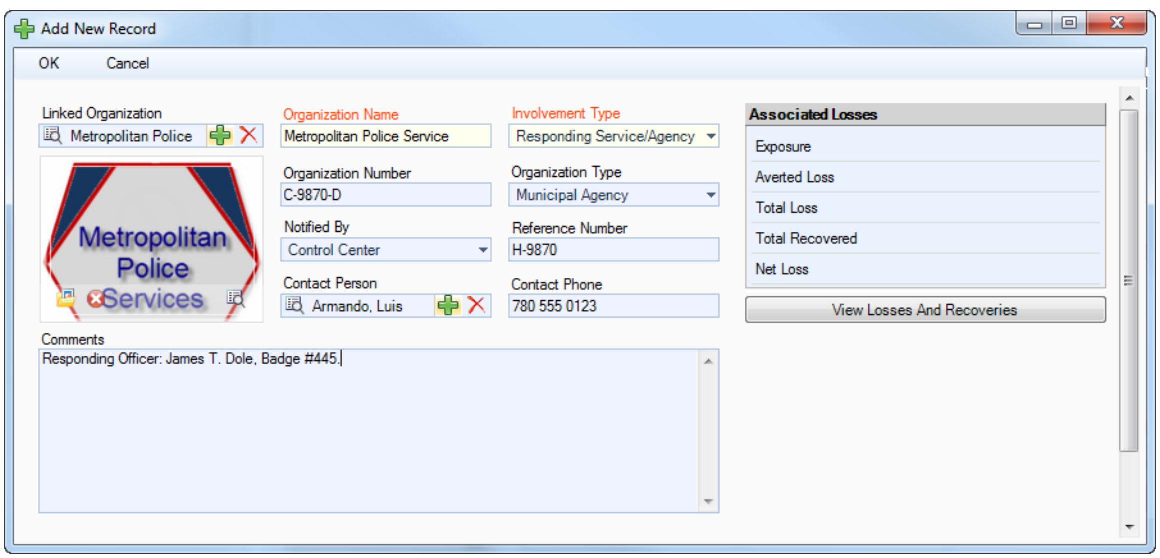
5. Specify how the organization became involved in the occurrence by selecting a description from the **Involvement Type** lookup list.

6. If applicable, input the organization's file, ID, or other tracking number in the **Organization Number** field.

7. Select an **Organization Type** from the lookup list.

8. Specify the means by which the organization has been notified of the occurrence in the **Notified By** lookup list.

9. If there is any documentation associated with the organization's involvement in the occurrence (e.g., a work order), note the associated tracking number in the **Reference Number** field.



10. Select the name of the organization's primary contact from the **Contact Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

11. Enter the contact person's phone number under **Contact Phone**. Ensure that you use a consistent format when entering phone numbers.

12. Enter notes in the **Comments** box.

13. To add the organization's logo to the record, click the **Add** icon in the image box.

14. Locate the image file in the browser window and click **Open**.

Note an Action Request Sent to the Involved Organization

1. Open the **Click to Add Request Details** link.

2. Choose the appropriate description for the requested action from the **Request Type** lookup list.

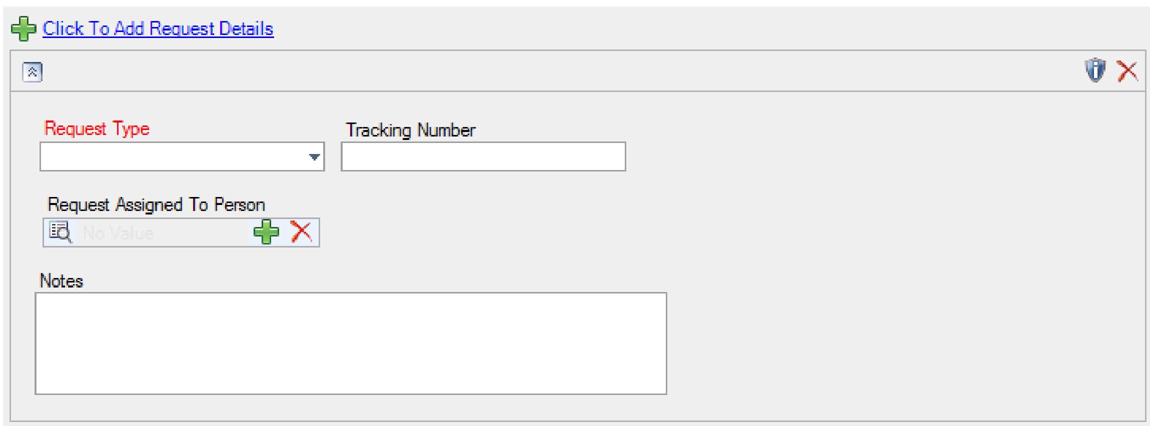
3. If there is a tracking or other ID number, enter it in the **Reference Number** field.

4. Enter the date the request was made in the **Assigned Date** field.

5. Select the record of the person who has been administered the request from the **Request Assigned To Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

6. When the action is complete, input the **Completed Date**.

7. Add any necessary **Notes**.



Log the Involved Organization's Response to the Incident

1. Open the **Click to Add Response Details** link.

2. Select the record of the person in the organization who responded to the incident from the **Responding Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

3. Select the record of the person who called the organization from **Notified By Person**.

4. Enter the date and time the organization was contacted in the **Called Date/Time** field.

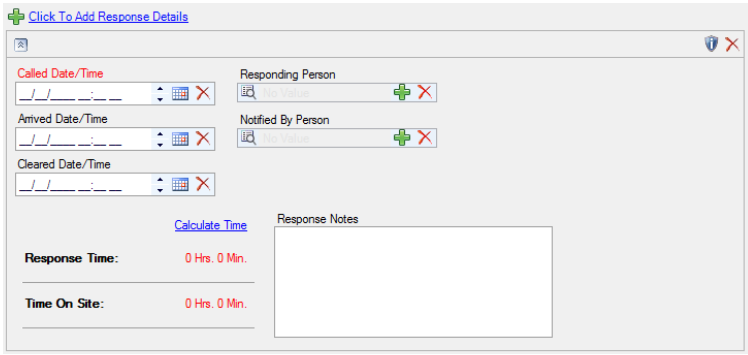
5. Enter the date and time the organization arrived on site in the **Arrived Date/Time** field.

6. When the organization's response is complete and they have vacated the site, enter the completion date and time in the **Cleared Date/Time** field.

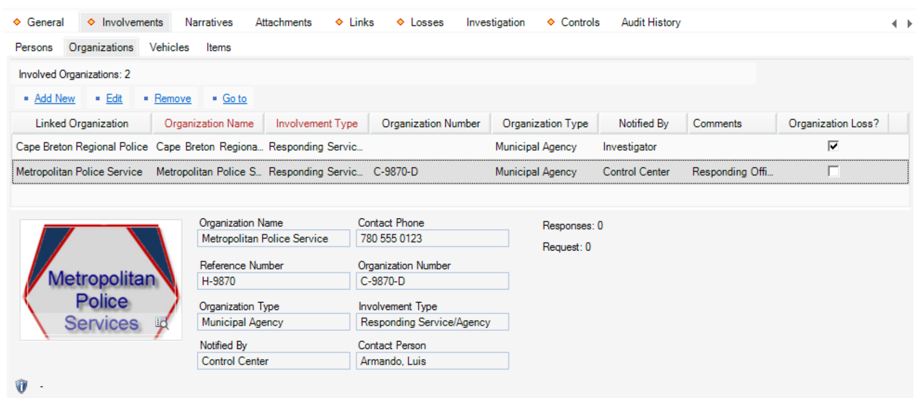
7. Click the **Calculate Time** link to determine how long it took the organization to respond (Response Time) and how long they remained on site (Time On Site).

8. Add any useful **Response Notes**.

9. Click **OK**.



10. As you click OK, the newly created entity will be displayed in the Involved Organizations list, each entity occupying a single row in the list. To display the entity's general information in the bottom Viewing pane, select the corresponding row in the list.



Add Losses and Recoveries Associated with the Involved Organization

Complete the operation, as described in the "Add Losses and Recoveries Associated with an Involved Entity" sub-section in the "Identify All Involved Persons" section.

Document All Involved Vehicles

Note General Details of an Involved Vehicle

1. Select the **Involvements** tab.

2. Select the **Vehicles** sub-tab.

3. Click **Add New**. A pop-up window will open.

4. Select the involved vehicle from the **Linked Vehicle** pick list. If a Vehicle record does not already exist, use the Quick Add function to create one.

- The License Plate field will now automatically populate with the linked vehicle's license plate number. Depending on the data available, some additional fields may also populate with information drawn from the linked vehicle's record.

5. Indicate how the vehicle became involved in the occurrence by selecting a description from the **Involvement Type** lookup list.

6. Select the most appropriate description of the vehicle's current status from the **Disposition** lookup list (e.g., Seized, Stolen, Released to Owner).

7. Specify the vehicle's **Year**, **Make**, **Model**, **Style**, and **Color**. Your selection in the Model field will depend on the value recorded in the Make field.

8. If known, enter the vehicle's **VIN** and approximate **Vehicle Value**.

9. If the vehicle belongs to your organization, check the **Company Vehicle?** box.

10. If known, indicate where the vehicle's license plate is registered in the **Country** and **State/Province** fields.

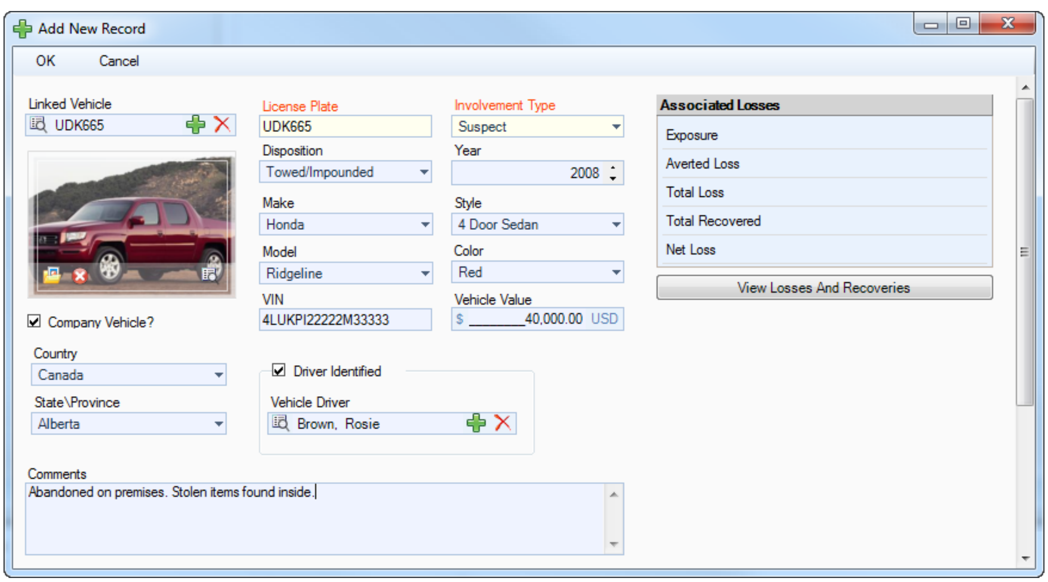
11. If the vehicle's driver was identified, check the **Driver Identified** box. Then, select the driver's name from the **Vehicle Driver** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

12. Enter any applicable notes under **Comments**.

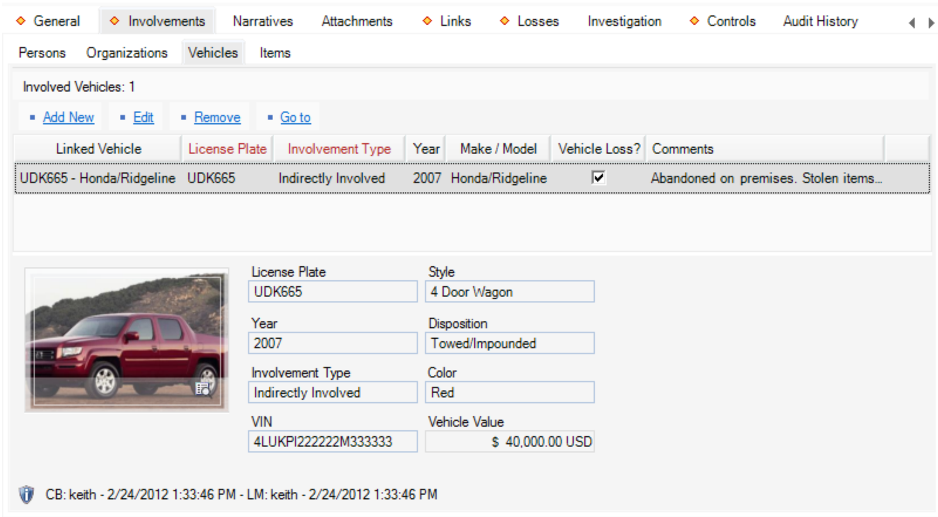
13. To add a photo of the vehicle to the record, click the **Add** icon in the image box.

14. Locate the image file in the browser window and click **Open**.

15. Click **OK**.



16. As you click OK, the newly created entity will be displayed in the Involved Vehicles list, each entity occupying a single row in the list. To display the entity's general information in the bottom Viewing pane, select the corresponding row in the list.



Add Losses and Recoveries Associated with the Involved Vehicle

Complete the operation, as described in the "Add Losses and Recoveries Associated with an Involved Entity" sub-section in the "Identify All Involved Persons" section.

Identify All Involved Items

Note General Details of an Involved Item

1. Select the **Involvements** tab.

2. Select the **Items** sub-tab.

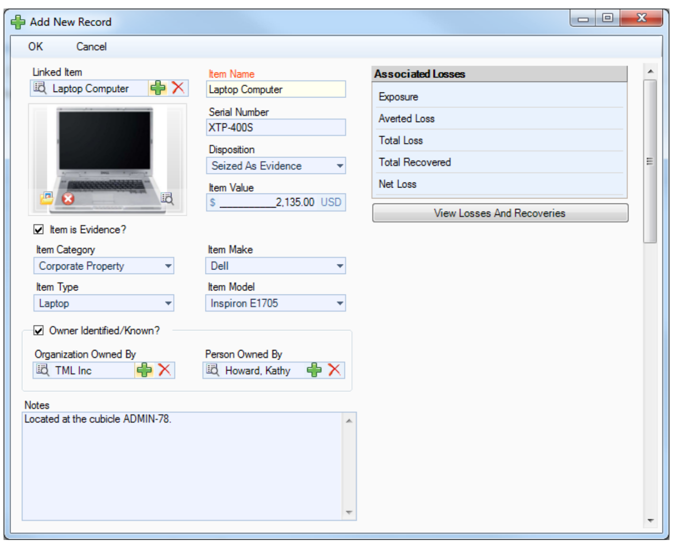
3. Click **Add New**. A pop-up window will open.

4. Select the involved item's name from the **Linked Item** pick list. If an Item record does not already exist, use the Quick Add function to create one.

    - The Item Name field will now automatically populate with the linked item's name. Depending on the data available, some additional fields may also populate with information drawn from the linked item's record.

5. If known, enter the serial or ID number of the item in the **Serial Number** field.

6. Select the most appropriate description of the item's current status from the **Disposition** lookup list (e.g., Seized as Evidence, Destroyed, Returned to Owner).



7. Enter the item's exact or estimated value in the **Item Value** field.

8. If applicable, check the **Item is Evidence?** box.

9. Identify the general classification of the item by making selections from the **Item Category** and **Item Type** lookup lists. These fields are hierarchical.

10. Specify the **Item Make** and **Item Model**. These fields are hierarchical.

11. If the item's owner is known, check the **Owner Identified/Known?** box. Then, select the name of the organization or person that owns the item from either the **Organization Owned**

By or **Person Owned By** pick lists. If an Organization or a Person record does not already exist, use the Quick Add function to create one.

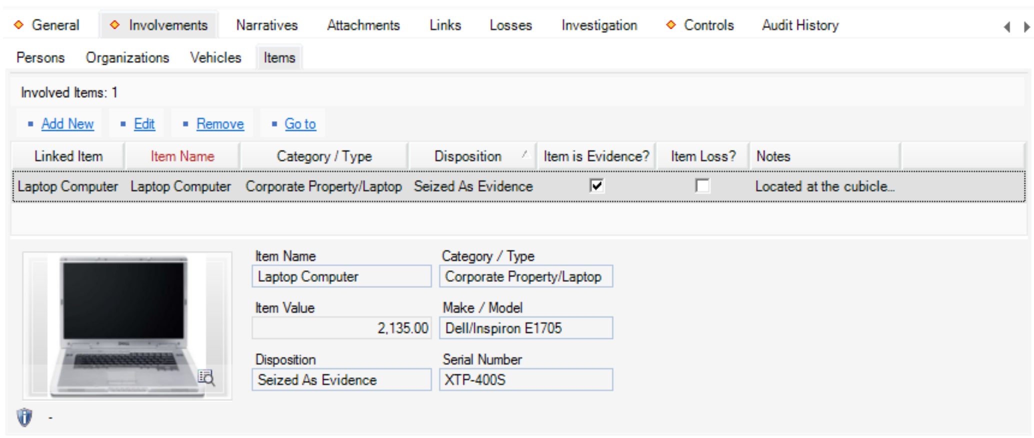
12. Add comments about the item in the **Notes** field.

13. To add a photo of the item to the record, click the **Add** icon in the image box.

14. Locate the image file in the browser window and click **Open**.

15. Click **OK**.

16. As you click **OK**, the newly created entity will be displayed in the Involved Items list, each entity occupying a single row in the list. To display the entity's general information in the bottom Viewing pane, select the corresponding row in the list.



Add Losses and Recoveries Associated with the Involved Item

Complete the operation, as described in the "Add Losses and Recoveries Associated with an Involved Entity" sub-section in the "Identify All Involved Persons" section.

Summarize an Incident or a Case

1. Select the **Narratives** tab.

2. Click the appropriate **Add** link. The Narrative Editor window will open.

3. Choose the applicable description from **Narrative Type** (e.g., Executive Summary, Original Narrative, Follow-up). By default, your name will appear in the Author field.

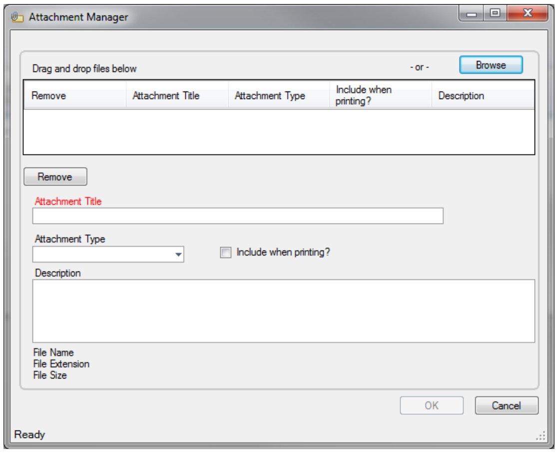
4. Type your narrative in the text box.

    - For details on operating the Narrative Editor, consult "Appendix B: Text Editor Navigation" at the end of this guide.

5. When finished composing your narrative, click **Accept & Return**. The Narrative Editor window will close, and the new narrative record will populate the Narratives grid.

Attach a File to a Record

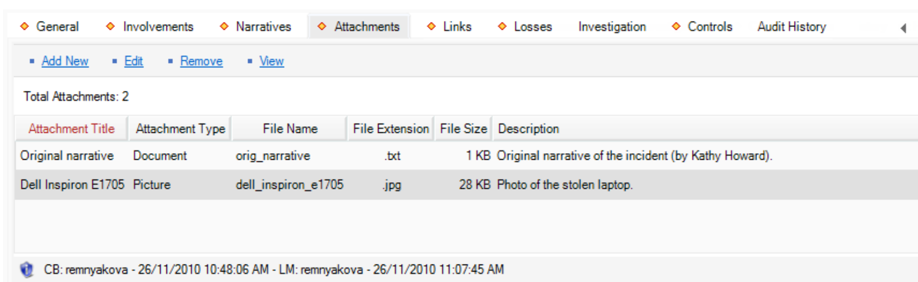
1. Select the **Attachments** tab.
2. Select the **Files** sub-tab.
3. Click the applicable **Add** link. A pop-up window will open.
4. Add attachments by either dragging and dropping or clicking **Browse**.
5. For each attachment, do the following:
   a. The **Attachment Title** field will automatically populate with the name of the attached file. If necessary, modify the name.
   b. From the **Attachment Type** lookup list, select the appropriate designator for the attachment (e.g., Document, Picture, Video, Voice Recording).
   c. Give an overview of the attachment in the **Description** text box.
   d. For image files (e.g., .bmp, .gif, .jpg, .png), check the **Include when Printing?** box to have a copy of the image included with every print-out of the record.
   e. Click **Remove** to remove any unwanted attachments.
6. Once you are finished working with attachments, click **OK**.



7. To preview an attachment, ensure the attachment is highlighted in the grid and click **View**.

8. Once the attachment is loaded, click **Open**. The attachment file will open in a separate window.

9. Close the window to return to the record.



View Attachments

There are two ways to view attachments in Perspective.

The first way to view an attachment is the following:

1. Select the **Attachments** tab.

2. Select the **Files** sub-tab.

3. Click the file name you want to view from the list of attached files.

4. Click the **View** link.

5. Click **Open**.

The second way to view an attachment is the following:

1. Select the **Attachments** tab.

2. Select the **Pictures** sub-tab. Thumbnails of attached files will be visible.

3. Left-click the thumbnail for a full screen view of the attachment.

4. To close the full screen view of the attachment, click the X icon in the top right corner.

   a. Right-click the thumbnail to view the title and description of the attachment. Right-click to go back to the thumbnail.

Link the Incident to an Activity

1. Select the **Links** tab.

2. In the Activity Links section, click **Add New**. A pop-up window will open.

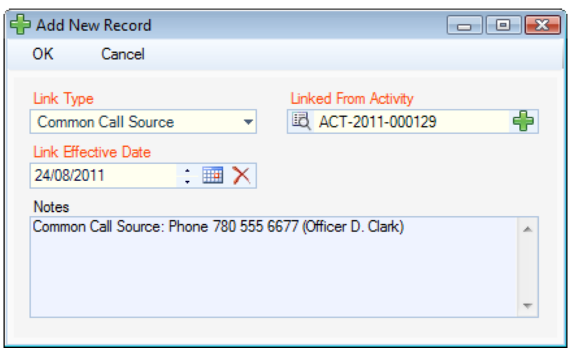
3. Specify how the incident and activity are related in the **Link Type** field (e.g., Common Call Source, Common Location).

4. Select the appropriate activity from the **Linked From Activity** pick list.

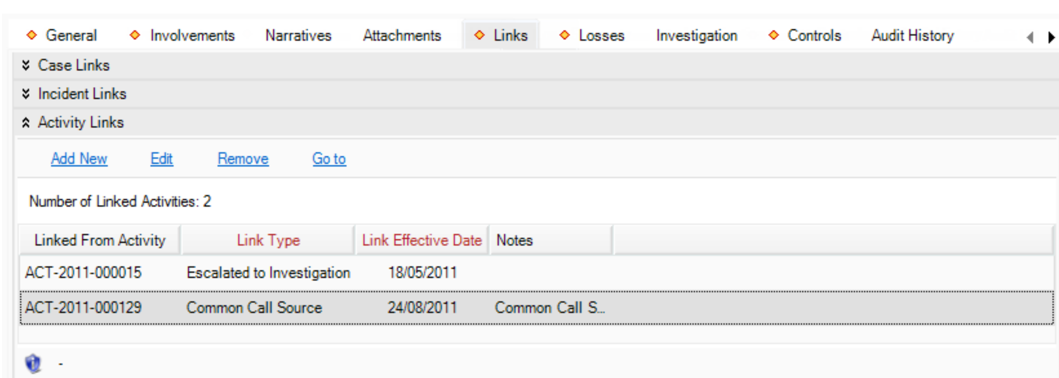
5. Indicate the date that the incident became associated with the activity in the **Link Effective Date** field.

6. Type any additional information about the link in the **Notes** field.

7. Click **OK**.



8. Click **Save**, after which this link will be automatically cross-referenced in the linked activity's record under the Links tab.



Link an Incident to Another Incident

1. Select the **Links** tab.

2. In the Incident Links section, click **Add New**. A pop-up window will open.

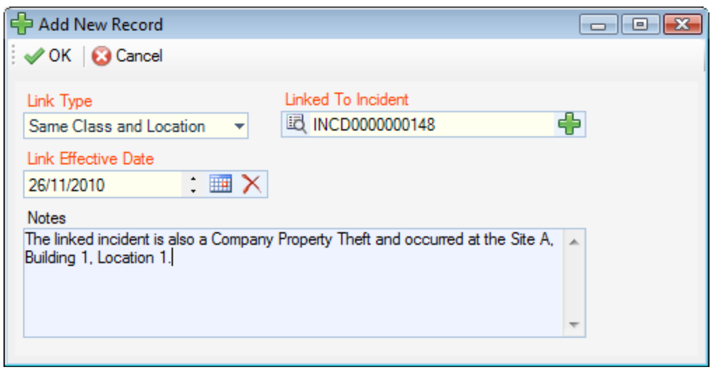
3. Select the appropriate incident from the **Linked To Incident** pick list.

4. Specify how the two incidents are related in the **Link Type** field (e.g., Common Suspect, Similar Description).

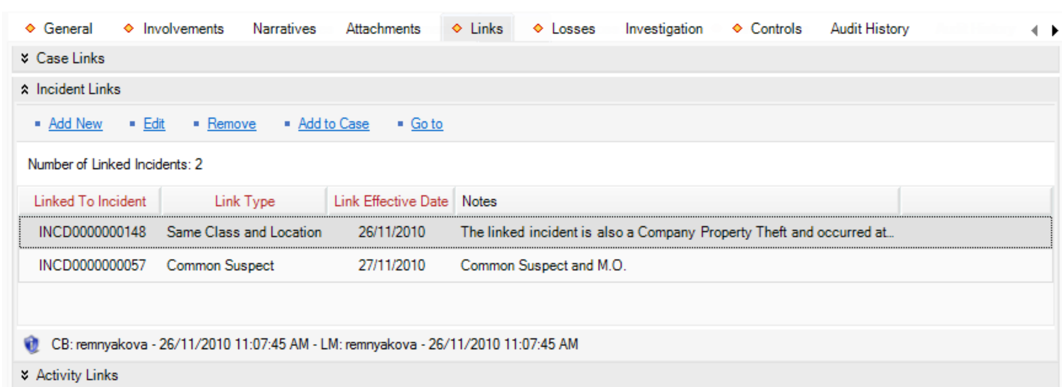
5. Indicate the date that the two incidents became associated with each other in the **Link Effective Date** field.

6. Type any additional information about the link in the **Notes** field.

7. Click **OK**.



8. Click **Save**, after which this link will be automatically cross-referenced in both Incident records under the Links tab.



To link all incidents in the grid and then open Incident record to a case, follow the procedures described below:

Note: The Case component is only available in the ICM and EIM Editions of Perspective.

1. Click **Add to Case**. A pop-up window will open.

2. Specify how the incidents are related to the case in the **Link Type** field (e.g., Common Person, Related Incidents).

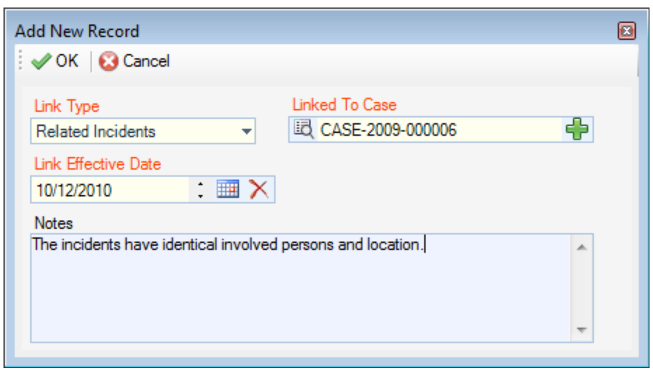
3. Select the appropriate case from the **Linked To Case** pick list.

4. Indicate the date that the incidents became associated with the case in the **Link Effective Date** field.

5. Type any additional information about the link in the **Notes** field.

6. Click **OK**.

7. A confirmation message will notify that links were created successfully. Click **OK**. These links will be automatically cross-referenced in the linked Case record under the Links tab.



Link an Incident to a Case

Note: The Case component is only available in the ICM and EIM Editions of Perspective.

1. Select the **Links** tab.

2. In the **Case Links** section, click **Add New**. A pop-up window will open.

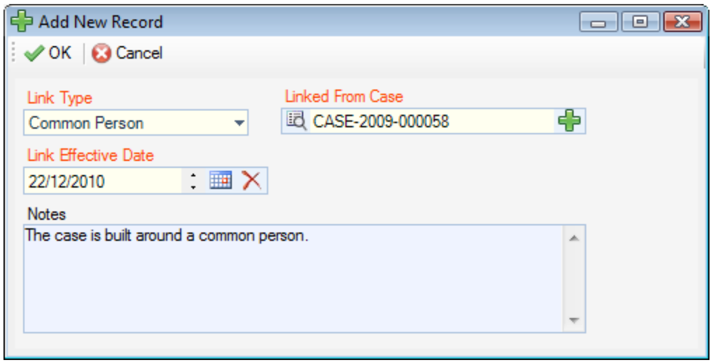
3. Specify how the incident and case are related in the **Link Type** field (e.g., Common Person, Related Incidents).

4. Select the appropriate case from the **Linked From Case** pick list.

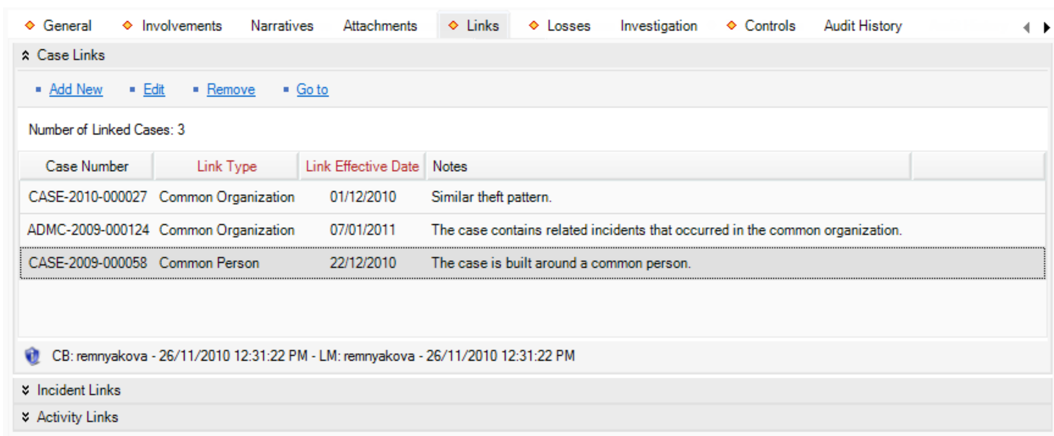
5. Indicate the date that the incident became associated with the case in the **Link Effective Date** field.

6. Type any additional information about the link in the **Notes** field.

7. Click **OK**.



8. Click **Save**, after which this link will be automatically cross-referenced in the linked case's record under the Links tab.



Record Losses Involved in an Incident and View Their Summary

The **Losses** tab within an Incident record can be used to add the following types of incident losses:

- **Loss**: A monetary loss that occurred in the course of the incident.
- **Recovery**: A loss amount associated with an incident that has been restored or regained as a result of an action that had been implemented after the incident took place.
- **No Impact Loss**: A loss that has been associated with an incident that has either been prevented or remains a potential loss and, hence, does not impact the Net Loss amount.

1. To add a loss, open the **Losses** tab and click on the **Add Loss**, **Add Recovery**, or **Add No Impact** hyperlink, depending on the type of loss that you want to record. Depending on the option you choose, a new screen will display a subform designed for the type of loss you selected.

   Note: Some of the following fields may not be available on the form that you see on the screen; those fields will be supplied with additional directions.

2. In the process of adding a loss, you may choose to either associate the loss with the broader Incident record or with one of the incident's existing involvements (i.e., an involved person, organization, vehicle, or item). To specify the type of data you want to associate your loss entry with, select one of the options from the **Associated Type** lookup.

   Note: If you want to add a loss associated with an incident's involvement that has not been recorded yet, you must first create an involved record under the Involvements tab before creating the loss record. For a detailed description of the procedure of adding involved persons, organizations, vehicles, or items to an Incident record, see the "Identify All Involved Persons", "Identify All Involved Organizations", "Document All Involved Vehicles", and "Identify All Involved Items" sections.

3. If you chose to associate the loss with any of the incident's involvements (e.g., Person Involvement), select the specific unit of involvement that has been previously recorded under the Incident form from the **Associated To** lookup (e.g., Brown, Jeff).

   Note: The options available on the lookup have been cross-populated from each of the involvement's sub-tabs and can only contain involvement records that had been created and saved prior to adding the loss.

   The same function is available under each of the involvements' sub-tabs. For details, please see the "Add Losses and Recoveries Associated with an Involved Entity" section.

4. Enter the **Date** that is associated with the loss (e.g., a date when the loss or the recovery occurred, or a date when the no impact loss is most probable).

5. Enter the number of loss units, as well as the approximate value of each unit in the **Unit(s)** and **Value Per Unit** fields. The Total field below will automatically calculate the total value of loss multiplying the Unit(s) by the Value Per Unit values.

6. Identify the nature of the loss under **Loss Type** (e.g., Direct or Indirect, Averted, or Exposure).

7. If applicable, specify the reason for the actual or the potential loss you are recording under **Loss Cause** (e.g., Accident, Deliberate, or Unintentional Act).

8. If you are recording a loss that has actually occurred, determine the current state of the lost unit(s) under **Loss Status** (e.g., Compromised, Lost, Stolen, or Damaged).

9. Under **Method**, select a descriptor that best defines the way in which the loss occurred or can potentially occur (e.g., Wired Transfer or Cash).

10. For actual and no impact losses, select the name of the person who recovered the loss or defined the incident as incurring potential loss from the **Recovered/Determined By Person** pick list. By default, the field will contain the name of the person recording the loss.

11. If you are recording a recovery, also complete the **Recovered From Person** and the **Recovered From Organization** fields, as applicable.

12. Enter any additional comments under **Notes.**

13. Click **OK**. Once the changes are saved, the recorded loss data will populate the relevant columns of the Losses grid. For optimal analysis, you may arrange the loss entries by a column header (e.g., Associated To, Date, or Type) and change the position of the columns in the grid.

14. Click **Save** to synchronize the recorded data within the relevant involvement records and update the summary calculations displayed to the right of the grid.

- **Total:**

  Total Exposure: The total value of the *Exposure No Impact* loss associated with the incident and the involved entities.

  Total Averted: The total value of the *Averted No Impact* loss associated with the incident and the involved entities.

  Total Loss: The total value of the *Loss* amounts associated with the incident and the involved entities.

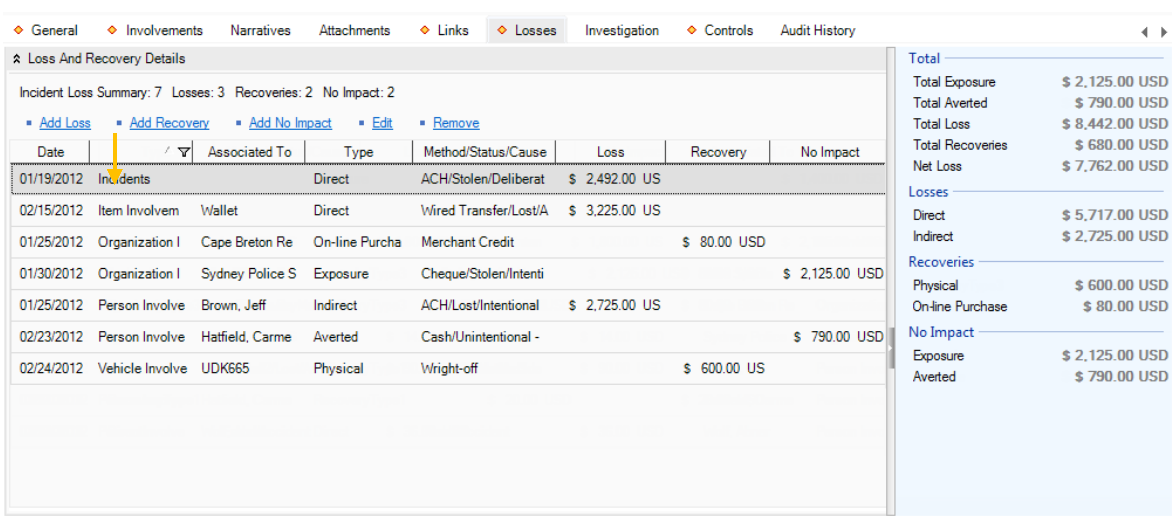
  Total Recoveries: The total value of the *Recovery* loss associated with the incident and the involved entities.

  Net Loss: The value determined by subtracting the *Total Recoveries* amount from the *Total Loss*.

- **Losses:** The total values of *Loss* amounts arranged by *Loss Type* (e.g., Direct or Indirect).

- **Recoveries:** The total values of *Recovery* amounts arranged by *Recovery Type* (e.g., Physical or On-line Purchase).

- **No Impact:** The total values of *Recovery* amounts arranged by *No Impact Type* (i.e., Averted or Exposure).



Record Incident Investigation Data

Note: The Investigation component is only available in the ICM and EIM Editions of Perspective.

Note General Details of an Investigation

1. Select on the **Investigation** tab.

2. Select on the **Details** sub-tab.

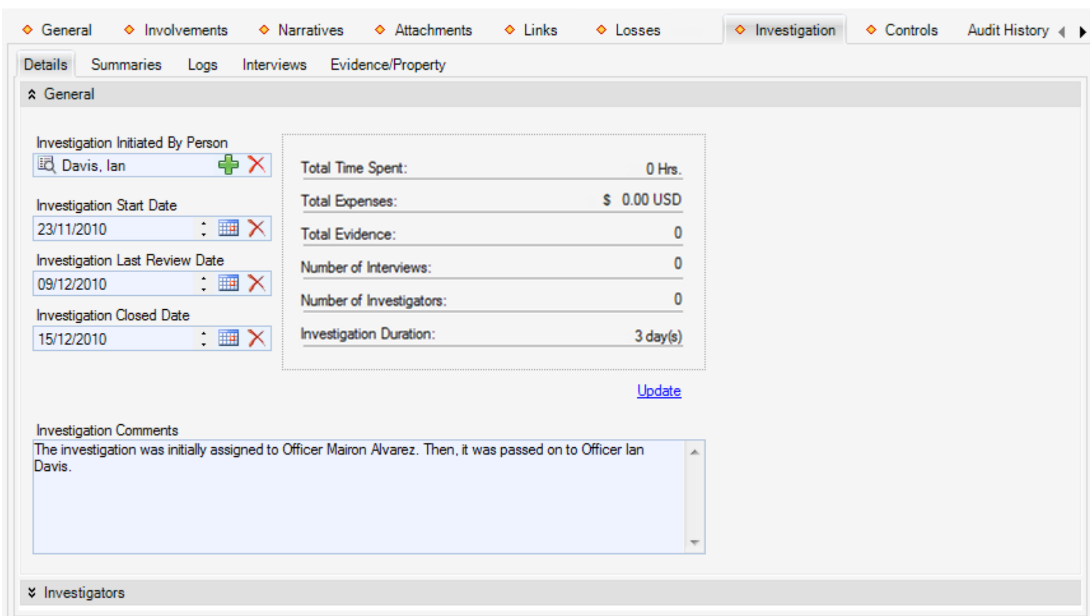
3. In the General section, select the name of the person who ordered the investigation from the **Investigation Initiated By Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

4. Enter the date the investigation was initiated under **Investigation Start Date**.

5. If the investigation has undergone a review, enter the applicable date in the **Investigation Last Review Date** field.

6. When the investigation is complete, enter this date in the **Investigation Closed Date** field.

7. Input general notes in the **Investigation Comments** box.



Assign an Investigator to an Incident's Investigation

1. In the Investigators section, click **Add New**. A pop-up window will open.

2. Specify the applicable role of the investigator in the **Investigator Type** field (e.g., Lead Investigator, Assisting Investigator, Forensic Specialist).

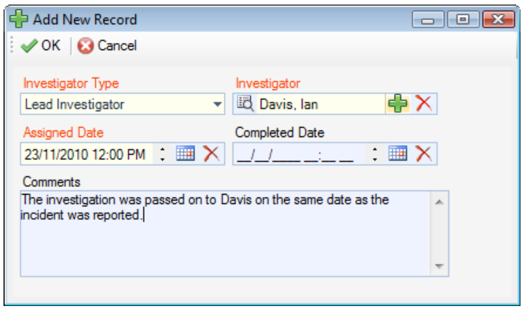
3. Select the record of the investigator from the **Investigator** pick list.

4. In the **Assigned Date** field, enter the date and time the person was assigned to the investigation team.

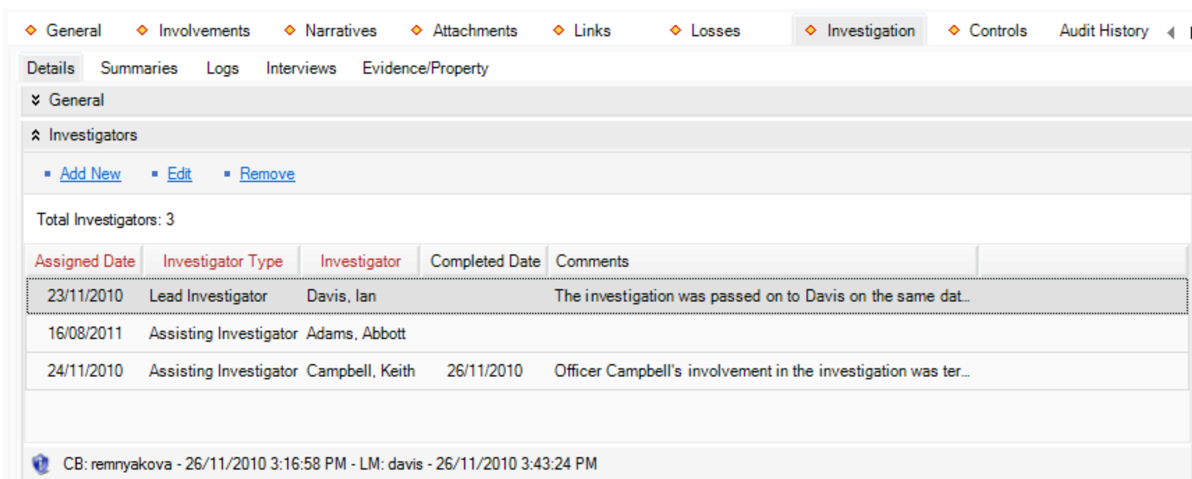
5. If the investigator is removed from the investigation team at some point, you may enter the applicable date and time in the **Completed Date** field.

6. Enter any relevant notes in the **Comments** box.

7. Click **OK**.



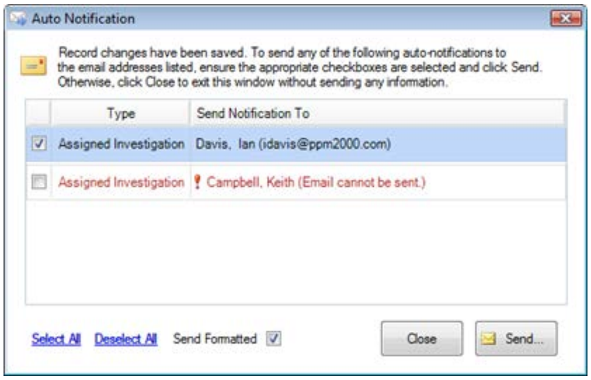
8. Add as many investigators to the Investigators list as necessary.



9. Click **Save**. An Auto Notification pop-up window will appear.

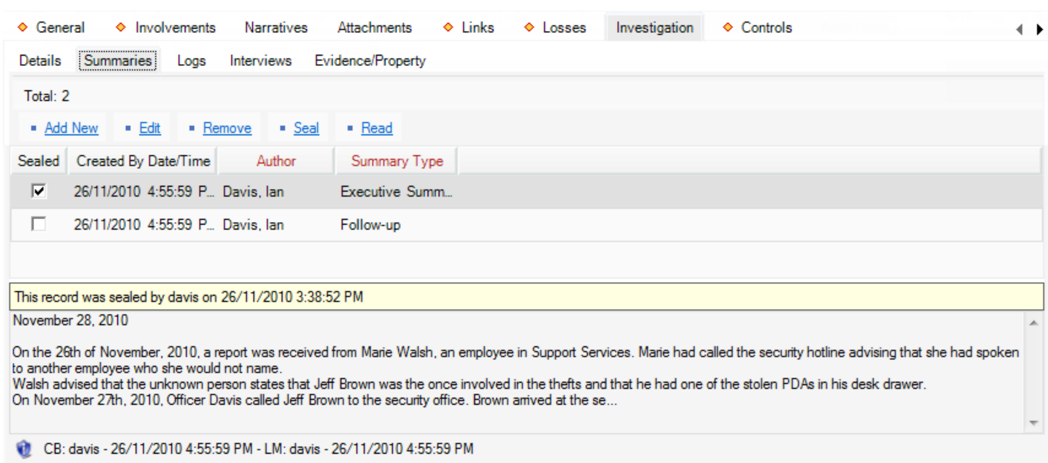
- To send an email notification of the assigned investigation to the investigator, ensure the appropriate checkbox is selected and click **Send**. Notifications are automatically sent in HTML. Deselecting the **Send Formatted** box, prior to clicking Send, will format the notification details in plain text rather than the default HTML table.

- If the investigator does not have a primary email address entered in the system, an error message appearing beside the investigator's name will indicate that an email cannot be sent. In this case, click **Close** to exit the window.



Summarize an Incident's or a Case's Investigation

1. Select the **Investigation** tab
2. Select the **Summaries** sub-tab.
3. Click the appropriate **Add** link. The Summary Editor window will open.
4. In the window, choose the applicable description from the **Summary Type** lookup list (e.g., Investigation Summary, Follow-up). By default, your name will appear in the Author field.
4. Type your summary in the text box. For details on operating the Summary Editor, consult "Appendix B: Text Editor Navigation" at the end of this guide.
5. When finished with your summary, click **Accept & Return**. The Summary Editor window will close, and the Summary's grid will populate with the new investigation summary.



Log Investigative Tasks and Expenses

1. Select the **Investigation** tab.
2. Select the **Logs** sub-tab.
3. Click the appropriate **Add** link. A pop-up window will open.

4. Specify the nature of the task in the **Task Type** field.

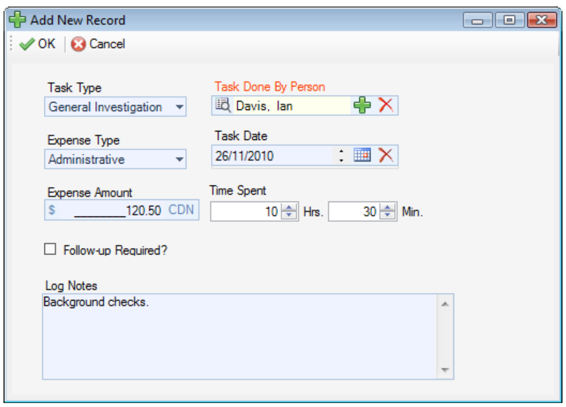
5. Select the name of the person who completed or must complete the task from the **Task Done By Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

6. If applicable, specify the date the task was finished under **Task Date**, and the time it took to complete under **Time Spent**.

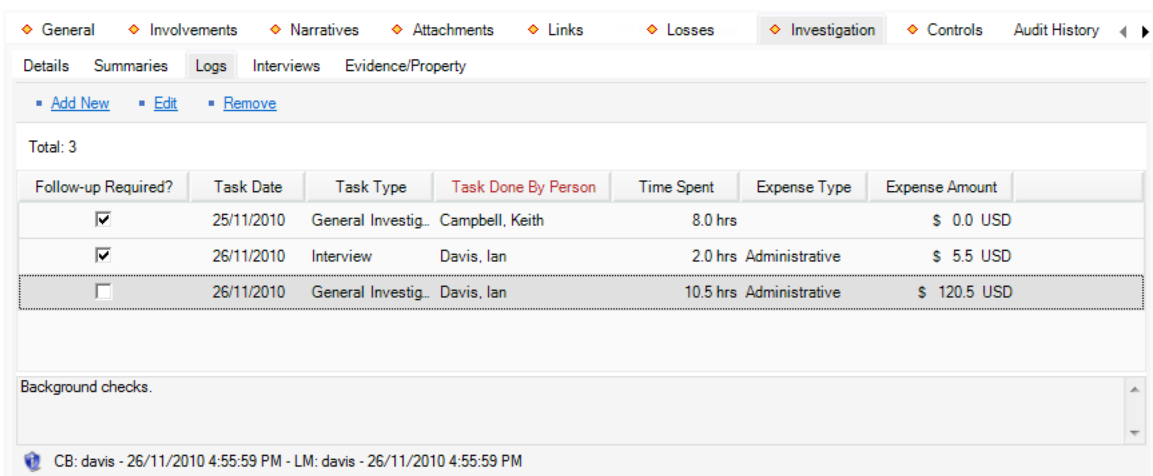
7. If there is an expense associated with the task, enter the **Expense Type** and the total **Expense Amount**.

8. Check the **Follow-up Required?** checkbox, if applicable.

9. Enter any additional information about the task under **Log Notes**.



10. Click **OK**. The investigative task and/or expense will be added to the Logs grid.



Document Investigation Interviews

1. Select the **Investigation** tab.

2. Select the **Interviews** sub-tab.

3. Click the appropriate **Add** link. The Interview Editor window will open.

4. In the window that appears, choose the applicable description from the **Interview Type** lookup list (e.g., Interview or Interrogation).

5. Select the name of the person who was interviewed from the **Subject of Interview** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

6. From the **Subject's Involvement Type** lookup list, specify the nature of the interviewee's involvement in the occurrence.

7. Select the name of the person who conducted the interview from the **Interview Conducted By** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

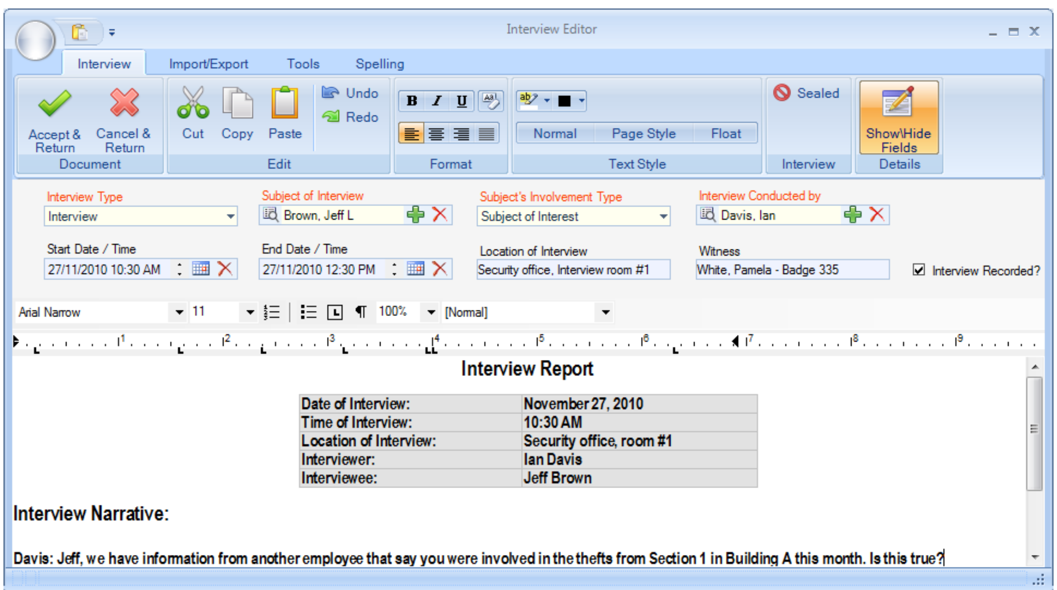
8. Specify the **Start Date/Time** and the **End Date/Time** of the interview.

9. State where the interview was conducted in the **Location of Interview** field.

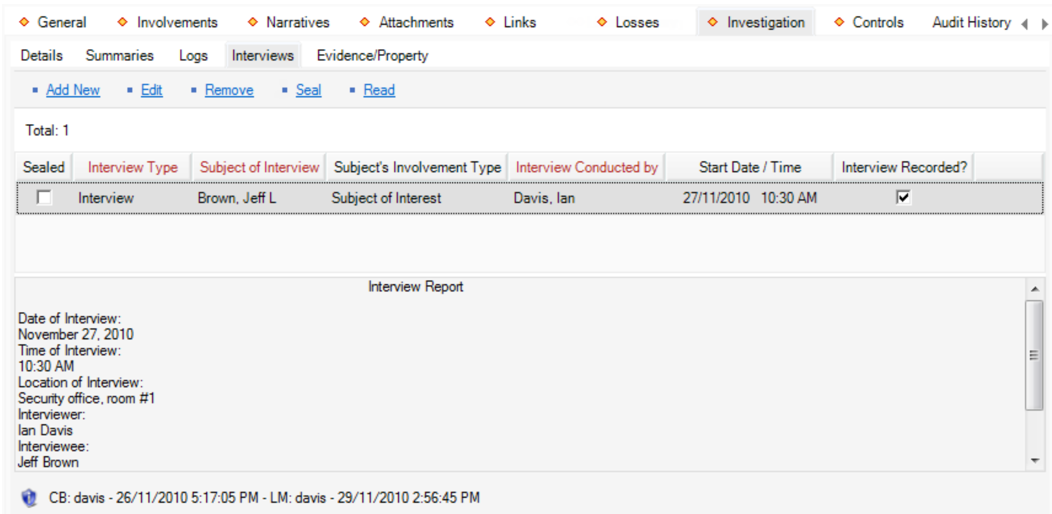
10. Identify the person who formally witnessed the interview in the **Witness** field.

11. Check the **"Interview Recorded?"** box, if applicable.

12. Type the interview transcript in the text box. For details on operating the Interview Editor, consult "Appendix B: Text Editor Navigation" at the end of this guide.



13. When finished composing the transcript, click **Accept & Return**. The Interview Editor window will close, and the new interview record will be entered in the Interviews grid.



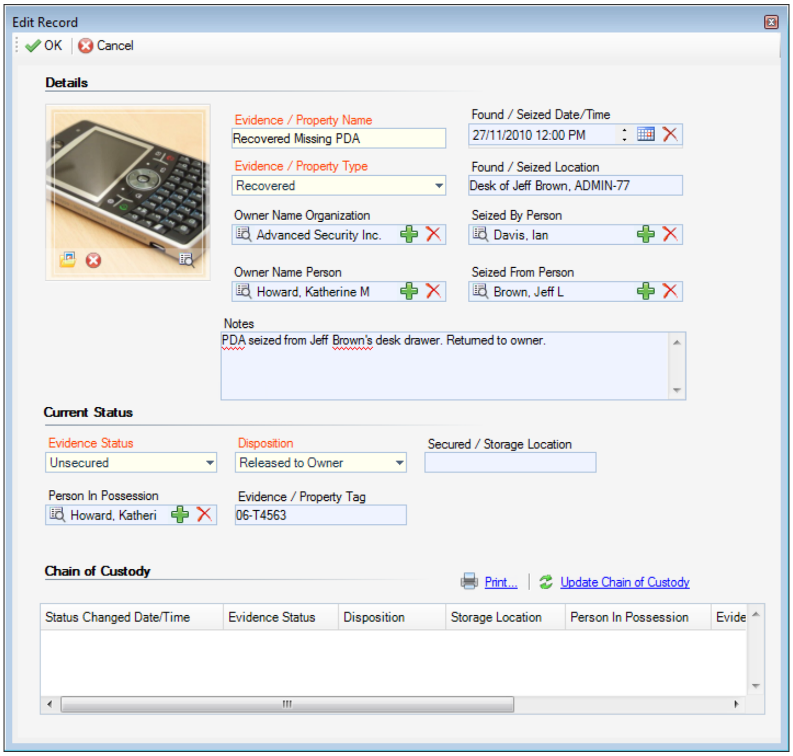
Track Investigation Evidence

1. Select the **Investigation** tab.
2. Select the **Evidence/Property** sub-tab.
3. Click the appropriate **Add** link. A pop-up window will open.
4. Input the item name under **Evidence/Property Name**.
5. Choose the applicable description from the **Evidence/Property Type** lookup list (e.g., Found, Recovered, Seized).
6. If known, select the name of the organization or person who owns the item from the **Owner Name Organization** or **Owner Name Person** pick lists. If an Organization or Person record does not already exist, use the Quick Add function to create one.
7. Specify the date and time the item was found/seized in the **Found/Seized Date/Time** field.
8. Describe where the item was found or seized in the **Found/Seized Location** field.
9. Select the person who seized the item from the **Seized By Person** pick list.
10. Indicate who the item was seized from by making a selection from the **Seized From Person** pick list.
11. Type any additional information about the item in the **Notes** textbox.
12. To add an image of the item to the record, click the **Add** icon in the image box.
13. Locate the image file in the browser window and click **Open**.
14. In the Current Status section, choose the appropriate descriptors from the **Evidence Status** and **Disposition** lookup lists.

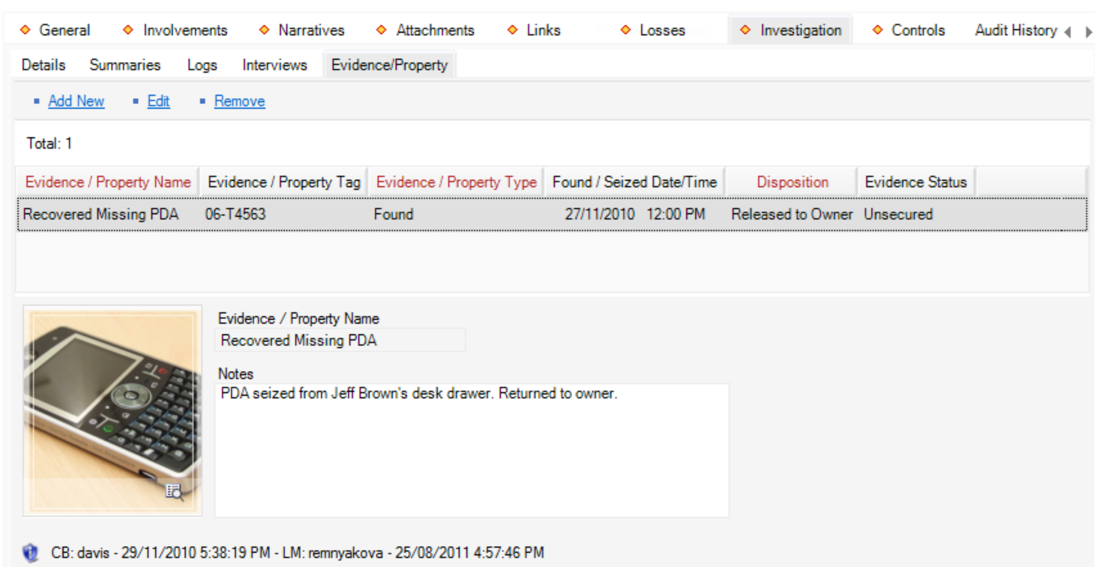
15. If the item is secured, enter the current location of the item in the **Secured/Storage Location** field.

16. Select the person who is currently in possession of the item from the **Person In Possession** pick list.

17. Input the applicable number in the **Evidence/Property Tag** field.



18. Click **OK** to save the entity in the Evidence/Property grid.

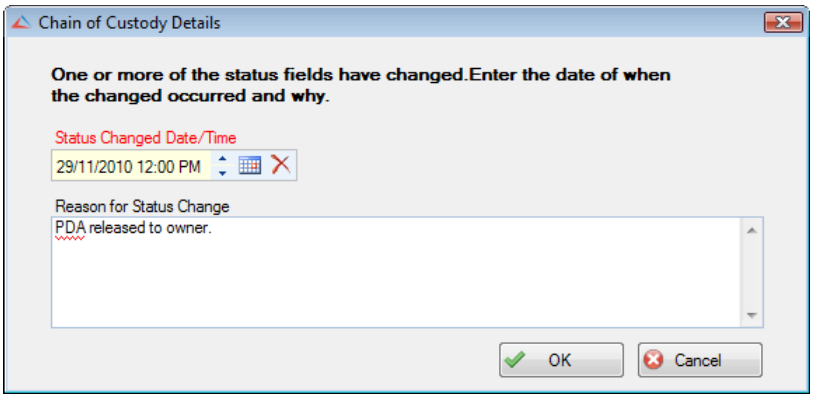


If you need to update the evidence's current standing, you have to open the relevant evidence entity in the "edit" mode, make the necessary changes to the fields listed under **Current Status**, and follow the procedures described below:

1. Click the **Update Chain of Custody** link. A pop-up window will open indicating that one or more of the status fields have been changed.

2. By default, the current date will appear in the Status Changed Date/Time field. Modify this if the item's status actually changed at an earlier date.

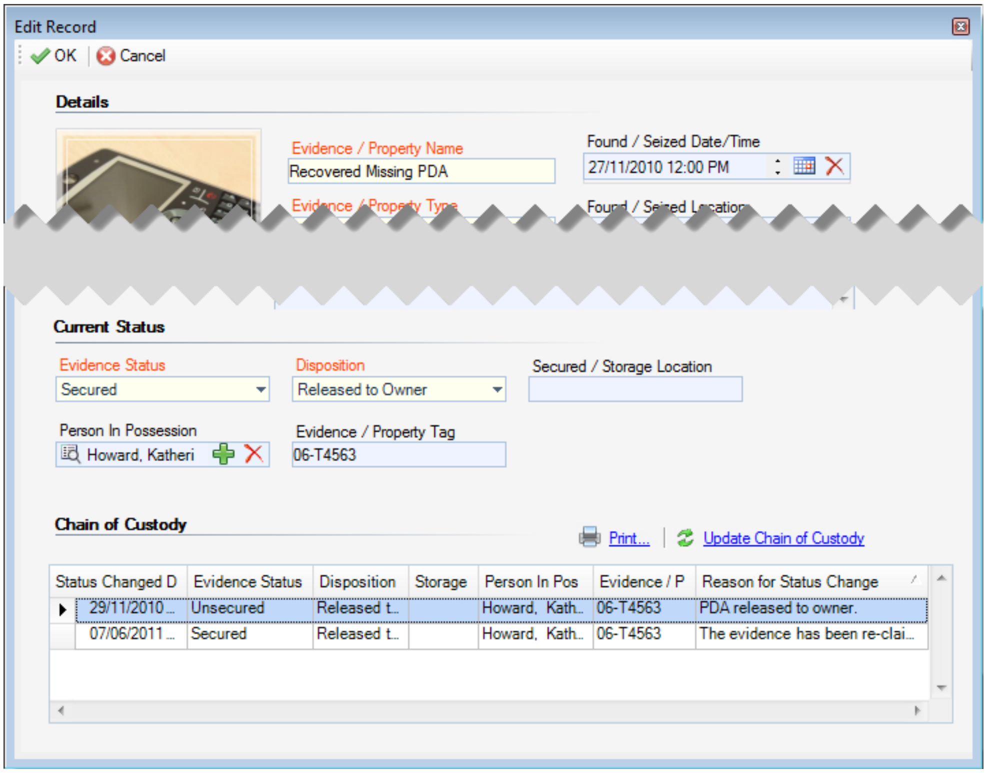
3. Explain the change to the item's status in the **Reason for Status Change** textbox.



4. Click **OK**. A new entry will now appear in the evidence record's Chain of Custody section, detailing, among other things, when and why the change was made.

5. If you want to print the Chain of Custody grid, click the **Print** hyperlink.

   Note: The Chain of Custody is not included in the Investigation Report. Therefore, this printing option is only available via the Evidence/Property sub-tab.



View an Incident's Key Investigative Data Summary

1. Select the **Investigation** tab.

2. Select the **Details** sub-tab. The incident's key investigative data will be displayed in the form of a table next to the general details of the investigation:

   - **Total Time Spent**: The total number of hours spent on the investigation to date, drawn from the Logs sub-tab.

   - **Total Expenses**: The total cost of investigation to date, drawn from the Logs sub-tab.

   - **Total Evidence**: The total number of evidence pieces that investigators have collected to date, drawn from the Evidence/Property sub-tab.

   - **Number of Interviews**: The total number of interviews that investigators have conducted to date, drawn from the Interviews sub-tab.

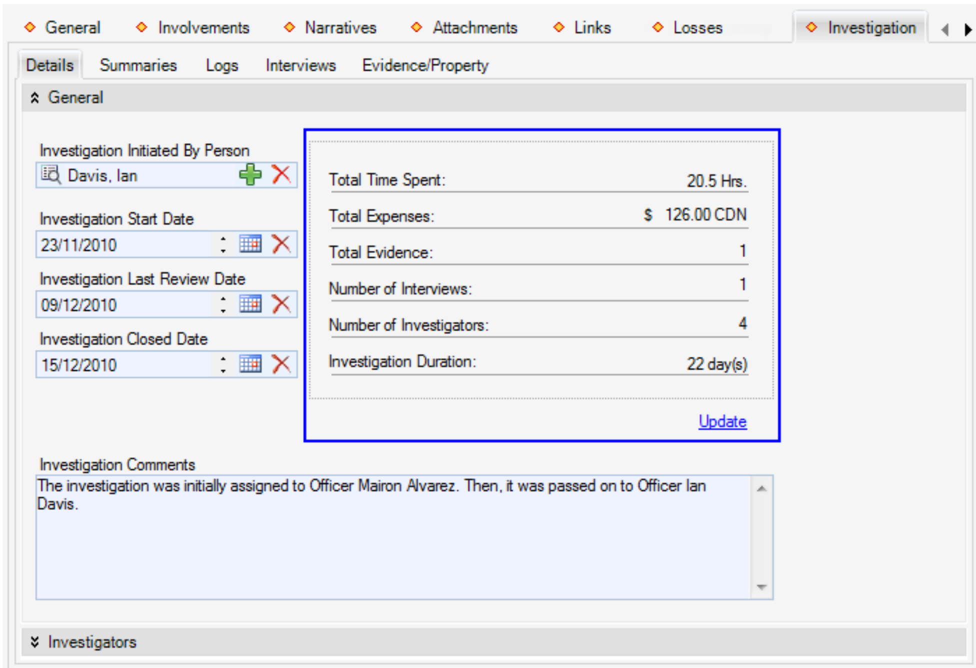
   - **Number of Investigators**: The total number of investigators examining the incident, drawn from the Investigators section of the Details sub-tab.

   - **Investigation Duration**: The length of the investigation, based on the time elapsed from the Investigation Start Date to the Investigation Closed Date (or current date if the investigation is not yet closed).

3. To refresh the information in the summary table, click the **Update** link.

4. Every time a review of the investigation is conducted, make sure to change the **Investigation Last Review Date** field.

5. Once the investigation is completed, enter the relevant date in the **Investigation Closed Date** field.



Control a Record's Processing Options

Set the Security Controls and Status of a Record

1. Select the **Controls** tab; the Details sub-tab will open by default.

2. In the Controls section, fill out the **Org Level** fields to set the record visibility settings for the various groups within your organization. Organizational rollups are hierarchical, so the option you select in the Org Level 1 field will determine what options are available in the Org Level 2 field, and so on. As you move down the hierarchy, organizational rollups become more specific, naming groups within your organization that are increasingly specialized by company division or region.

   Only users with organizational rollups *corresponding to or higher than* the organizational rollup you select for the record will have access to it. For example, if a record's rollup is North America/Canada/Alberta, the user whose organizational rollup is North America or North America/Canada/Alberta will have access to the record, while the user whose organizational rollup is North America/Canada/Alberta/Edmonton will not.

3. In the **Access Level** field, set the security level from 1 to 5. Each security level corresponds to a specific security description, such as "Classified". Only users with the same security Access Level as the one you select (or higher) will be able to view the record.

4. If you want to archive the record making it unavailable for users to access, check the **Archive (Record is not visible)** box.

5. Set the **Status** of the record to Open or Closed. Meanings of "open" and "closed" are dependent on your organization's definition of these statuses. Generally, an *open* record means that it is actively being worked on or, possibly, is inactive for a finite amount of time. The *closed* status in this case would mean that the record is no longer being worked on due to completion or inactivity for an indefinite amount of time.

6. Select the most appropriate description of the record's current standing in the **Disposition** field (e.g., Inactive, Pending Court, Waiting for Approval).

7. If any policy, legislation, or business rule pertinent to your organization's procedures requires information about the record, or the persons involved in the record, to be kept for a certain length of time, enter the end date of that period in **Expiry Date**.

   Note: No information will automatically be deleted on this date; it is for tracking purposes only.

8. From the **Record Owner** pick list, select the Person record that corresponds to the individual who is responsible for the closing the record. If a Person record does not already exist for this individual, use the Quick Add function to create one.

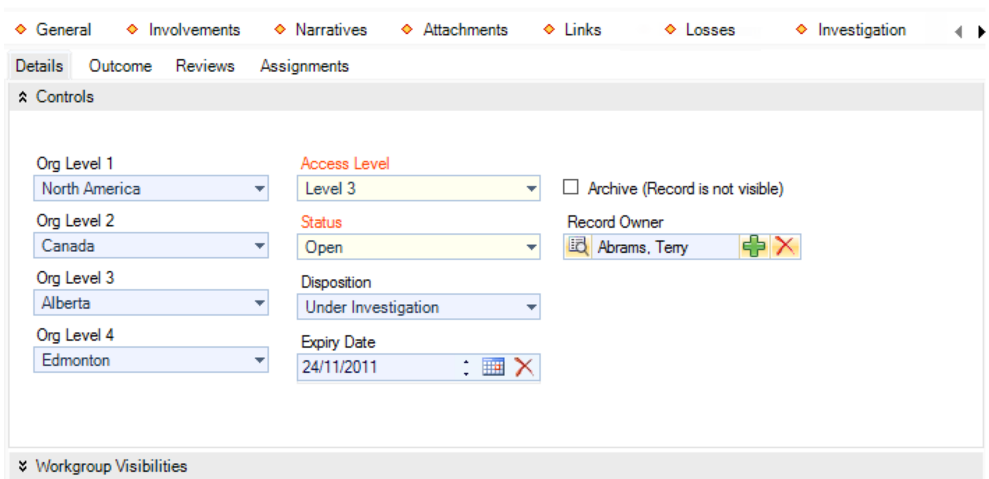


Figure 3.3.46: Setting security controls and status of a record

Define Which Workgroups Can Access a Record

1. In the **Workgroup Visibilities** section, give one workgroup the ability to read and modify the record by selecting them under **Owner Workgroup (Full Rights)**. Initially, the field will contain the name of your default workgroup. Once you attempt to change it, the system will display a confirmation dialog asking you if the "Full Access" rights that belong to the original owner workgroup should be transferred to the workgroup you have chosen.

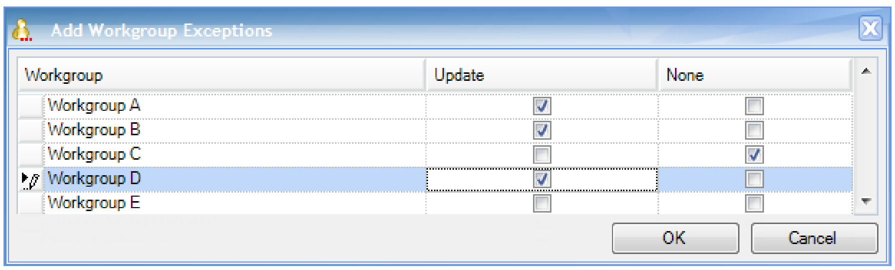
2. Click **OK** if the change was intentional.

3. Determine the access right for **All Other Workgroups**, selecting from the Read, Update, or None access right options.

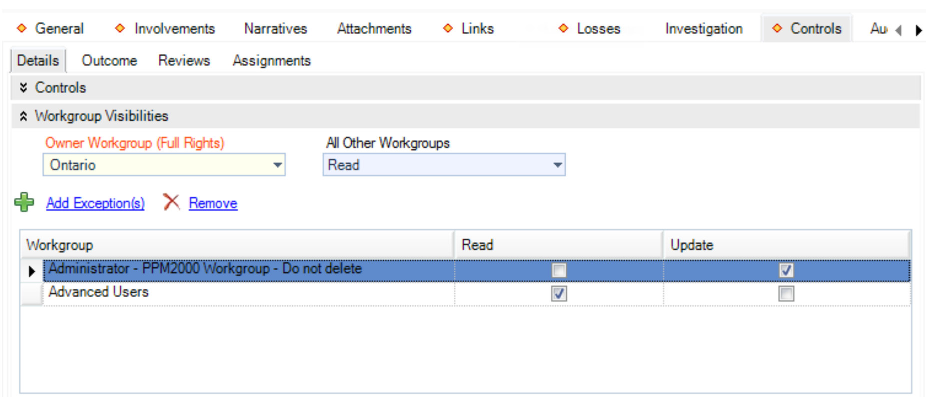
4. To set customized access for a workgroup that does not conform to the other control settings specified, click **Add Exception(s)**. A pop-up window will open.

5. Select the workgroup and then select the workgroup's visibility for this record (Read, Update, or None). Continue to customize workgroup visibility for as many workgroups as you like.

   Note: Workgroup visibility exceptions override the access settings assigned under All Other Workgroups.



6. Click **OK**. The selected workgroups and their corresponding modified access settings will be transferred to the Workgroup Visibilities grid.



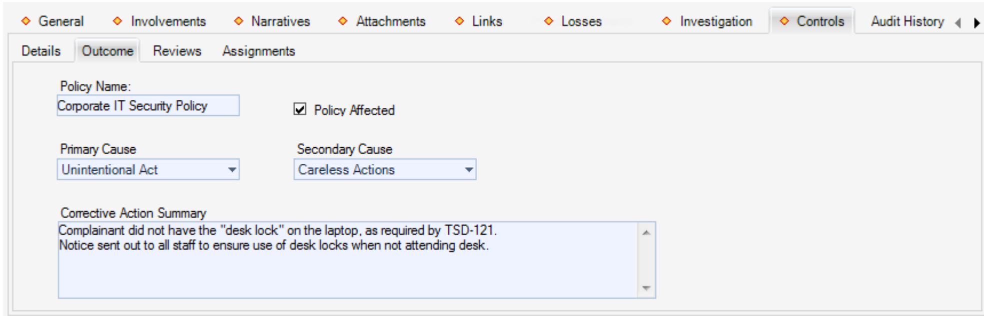
Describe the Incident's Causes and Consequences

1. Select the **Outcome** sub-tab.

2. If any polices or procedures were implemented, breached, or affected as a result of the incident, note this by checking the **Policy Affected** box and entering the **Policy Name**.

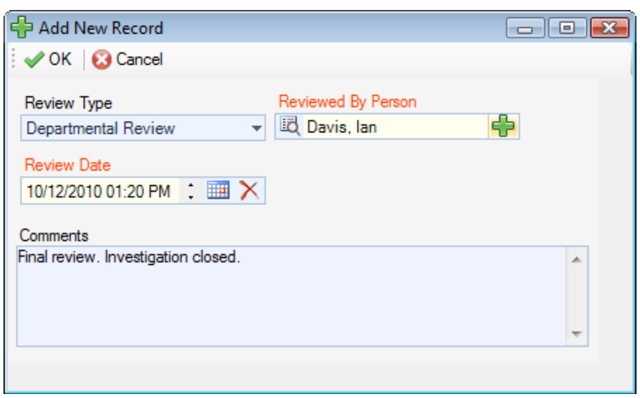
3. Once you have established why the incident occurred, select your conclusions from the **Primary Cause** lookup list and, if applicable, the **Secondary Cause** lookup list.

4. Add new policy information or action taken in the **Corrective Action Summary** text box.

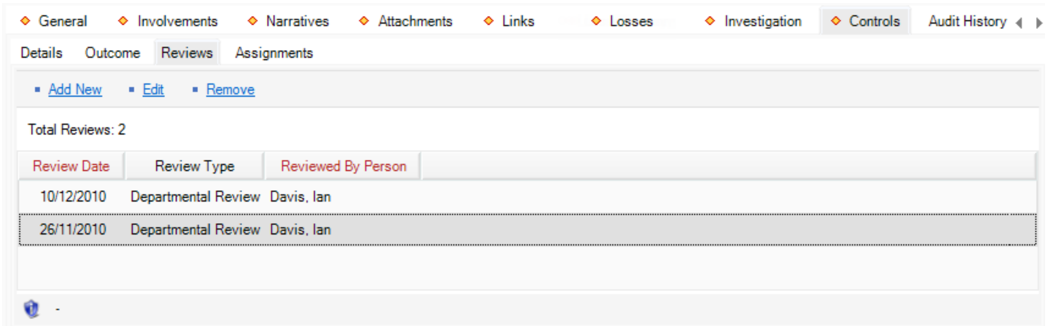


Document a Record-Related Review

1. Select the **Reviews** sub-tab.
2. Click **Add New**. A pop-up window will open.
3. Choose the applicable description from the **Review Type** lookup list.
4. By default, your name will appear in the Reviewed By Person field. If you are not the person who conducted the review, select the applicable person from the pick list.
5. Enter the date and time that the review was completed in the **Review Date** field.
6. Enter observations, results, notes, or other details pertaining to the review in the **Comments** box.



7. Click **OK**. The review entry will be added to the list of existing reviews in the main window.



Give a Record-Related Assignment to Another User

1. Select the **Assignments** sub-tab.

2. Click **Add New**. A pop-up window will open.

3. Choose the applicable option from the **Assignment Type** lookup list.

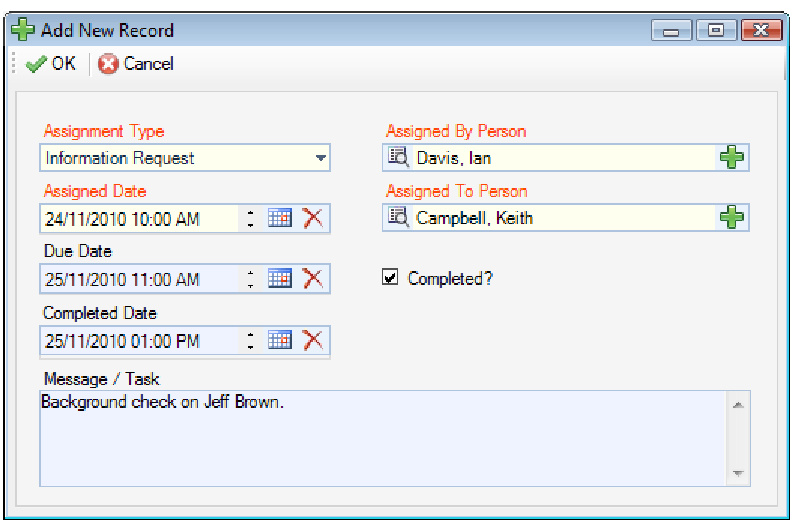
4. By default, your name will appear in the Assigned By Person field. If you are not the person who created the assignment, select the applicable person from the pick list.

5. Select the user who must complete the assignment from the **Assigned To Person** pick list.

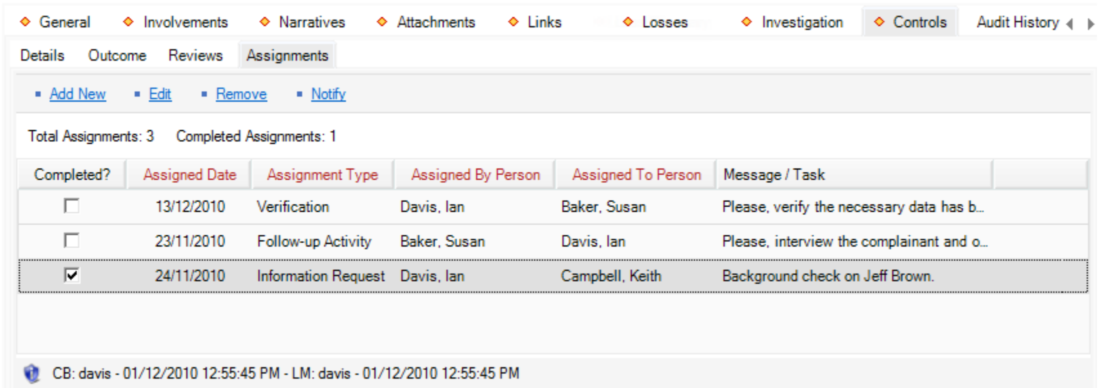
6. Complete the **Assigned Date**, and enter the date the assignment must be completed under **Due Date**.

7. When the assignment is finished, check the **Completed?** box and enter the appropriate date in the **Completed Date** field.

8. Enter notes or instructions in the **Message/Task** text box.



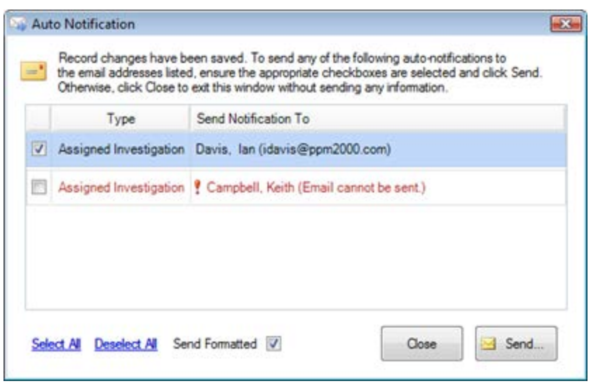
9. Click **OK**. The new assignment will be added to the Assignments grid.



10. Click **Save**. An Auto Notification pop-up window will appear.

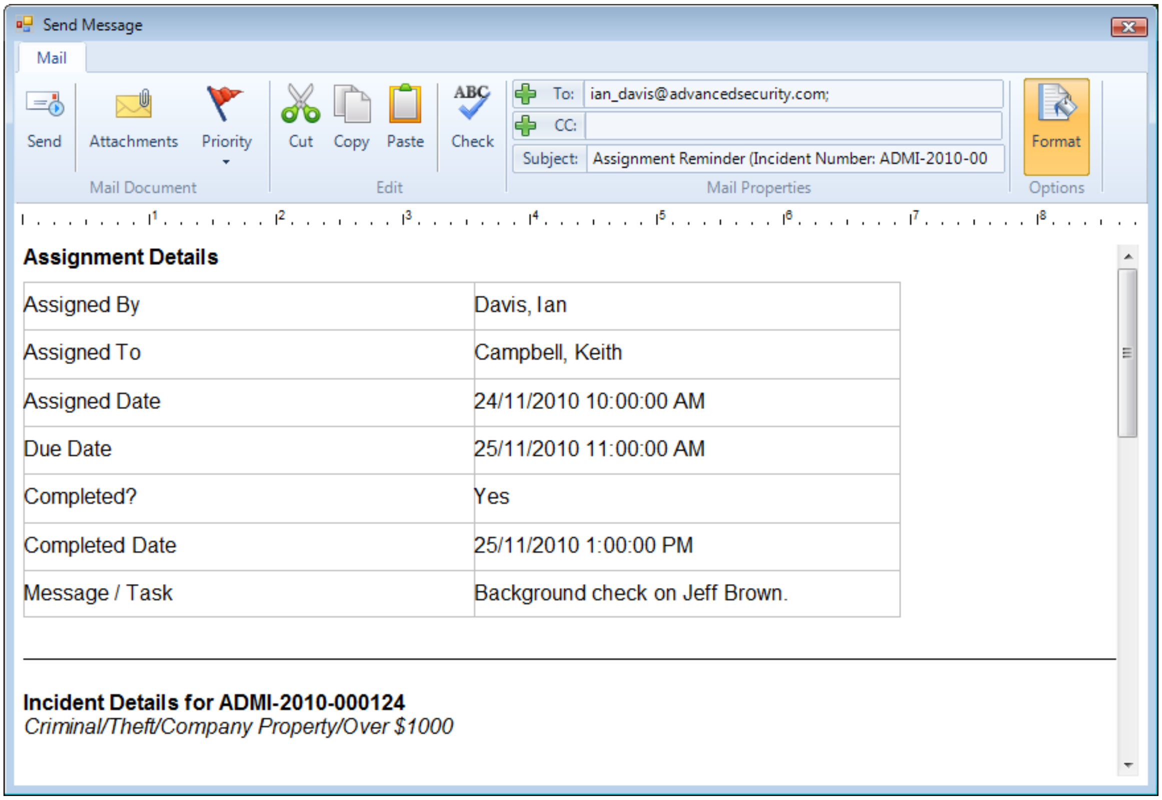
- To send email notifications of the assignments to the Assigned To Persons and/or of the completed assignments to the Assigned By Persons, ensure the appropriate checkboxes are selected and click **Send**. Notifications are automatically sent in HTML. Deselecting the **Send Formatted** box prior to clicking Send will format the notification details in plain text rather than the default HTML table. Once the notifications are sent, the Dashboards of the persons involved in the assignment will be populated with relevant Assignment records.

- If the person does not have a primary email address entered in the system, an error message appearing beside the person's name will indicate that an email cannot be sent. In this case, click **Close** to exit the window.



11. Every time you add a new assignment to the Assignments list or edit the old one and click Save, the system will automatically prompt you to send an email notification about the changes made. However, if you want to send an email notification of any of the record's old unedited assignments, you will need to select the specific assignment in the list and click **Notify**. An email message will open that contains the assignment and the record details.

12. Check the message details, adding any other information that you think is necessary, and then click **Send**.

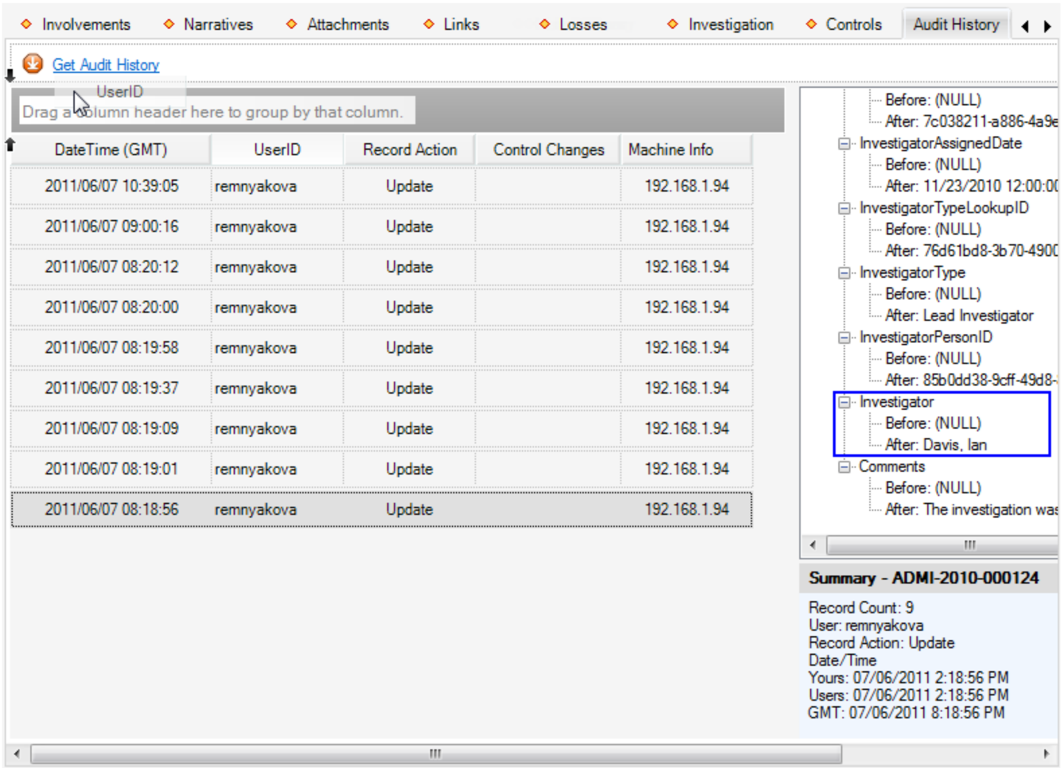


Track Changes Made to a Record

1. Select the **Audit History** tab.

2. Click **Get Audit History** to view all modifications made to the record since its creation. The Viewing pane will display entries for each change made to the record. Among the available data categories are the following:

   - **DateTime** indicates the time when the change was made in GMT.
   - **UserID** reveals who made the change.
   - **Record Action** describes what type of change was made.
   - **Control Changes** displays any modifications made under the Controls tab.
   - **Machine Info** specifies which computer was used to make the change.



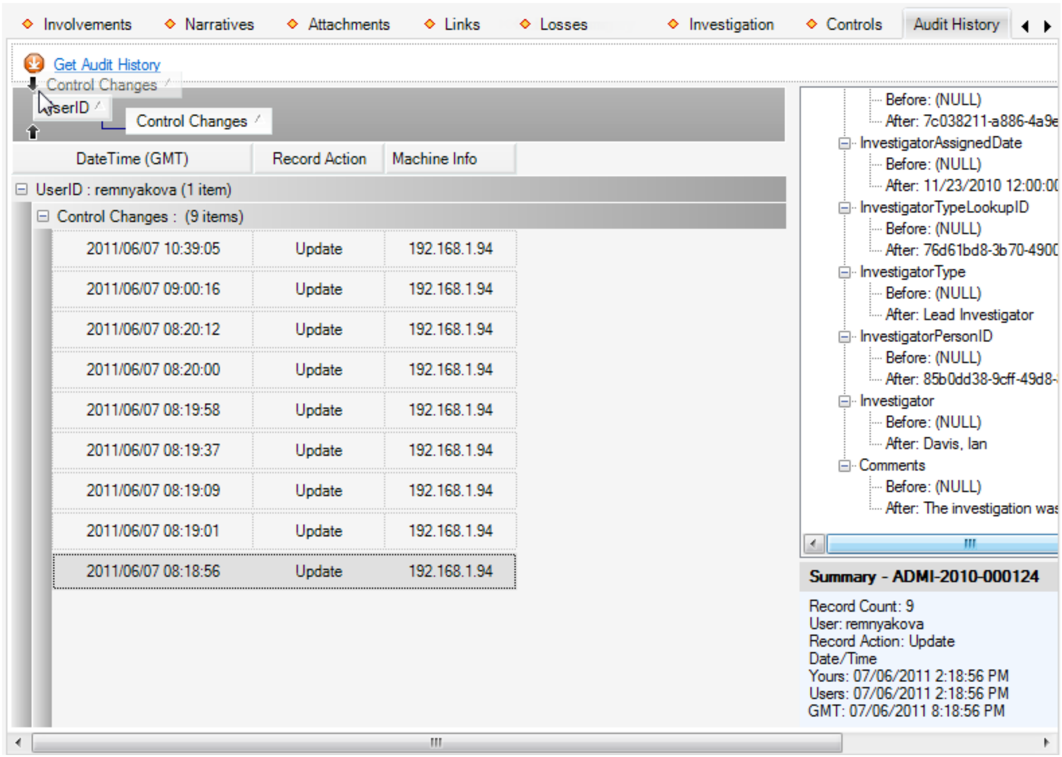
3. Select an entry to view further details in the Audit tree displayed on the right.

4. Expand the nodes of the audit tree to see exactly what the data value was Before and After the change was made.

5. To group entries of the Audit History by one of the column headers, drag the header to the field at the top of the grid. The black arrows will indicate a legitimate place for dropping the header. The entries will be grouped under the criteria available in the column, each criterion corresponding to a single group of entries.

6. If you want to further subgroup the entries in the available groups, drag the next column header to the grouping field. In this case, the first column header will remain the main grouping option, while all the subsequently added headers will create an internal grouping hierarchy within the main grouping.

7. You may invert the hierarchy at any time by dragging the corresponding column header to the appropriate node in the grouping tree.



Cases

Note: The Case component is only available in the ICM and EIM Editions of Perspective.

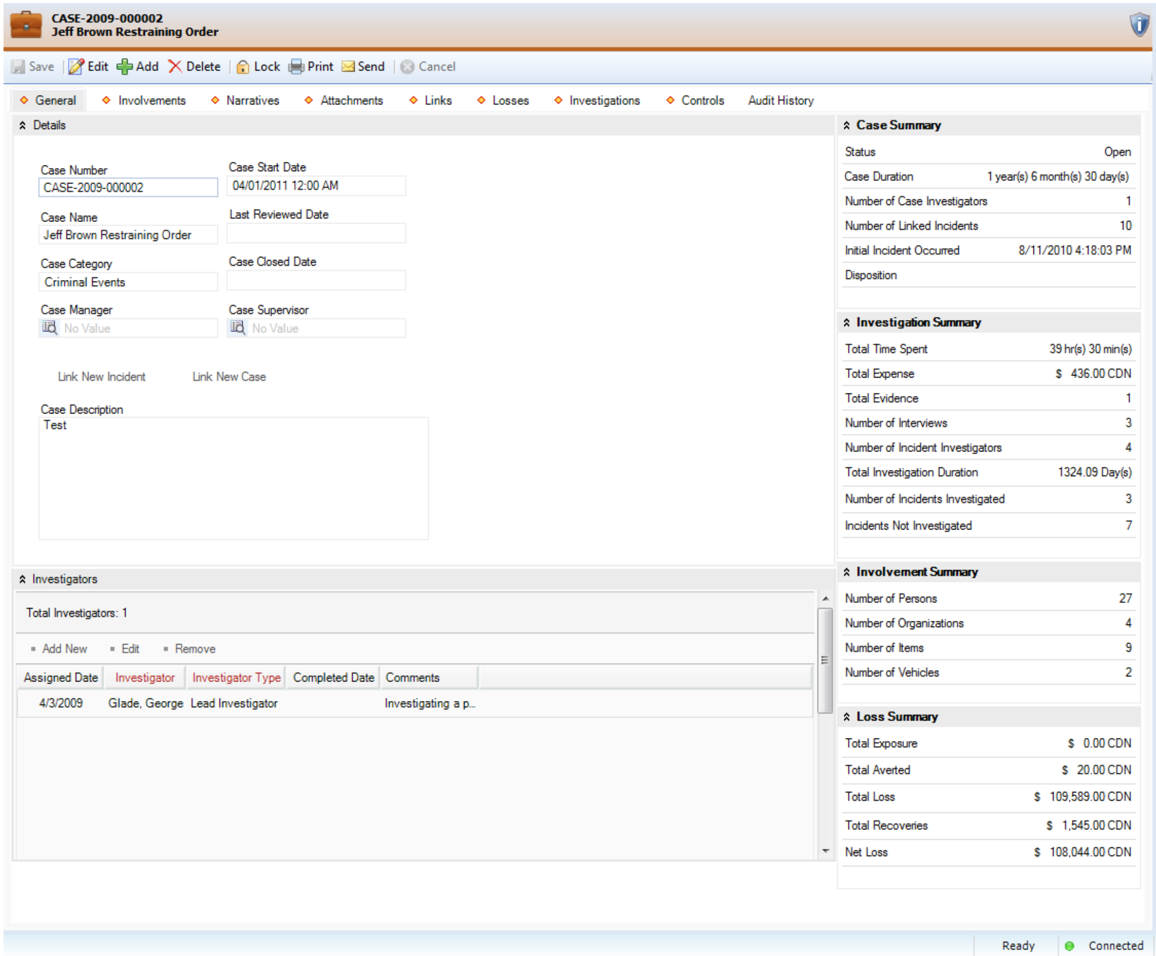
A "case" is a convenient tool that organizes multiple incidents that have a common reference subject or object (e.g., a common subject of interest, a similar organization where incidents took place) into a single entity that is designed for a more effective investigation process. Multiple incidents can make up one case. Therefore, many operations implied in completing a Case data form require you to choose if you would like to add data to the currently open Case record, or to an Incident that is linked to the currently open Case record.

This choice is controlled by the relevant functions on the Viewing pane:

- Click **Add to Cases** to connect a data entry operation to the currently open case.
- Click **Add to Incident** and select the appropriate incident from the pick list to connect the data entry operation to an incident linked to the currently open case.

Create a new Case record

1. Click the **Add** button on the Viewing pane toolbar.
2. Give the case a descriptive **Case Name**.
3. Identify the general classification of the case under **Case Category**.
4. Indicate when the case was opened under **Case Start Date**.
5. If the case has undergone a review, enter the applicable date in the **Last Reviewed Date** field.
6. When the case has been closed, enter this date in the **Case Closed Date** field.
7. Select the name of the **Case Manager**, as well as the **Case Supervisor**, from the applicable pick list fields.
8. Type a very brief overview of the case in the **Case Description** box. To enter a more detailed description of the case, use the Narratives tab.
9. Perspective will automatically assign the case a Case Number when the record is saved.



Assign an Investigator to a Case's Investigation

1. In the Investigators section of the General tab, click **Add New**. A pop-up window will open.

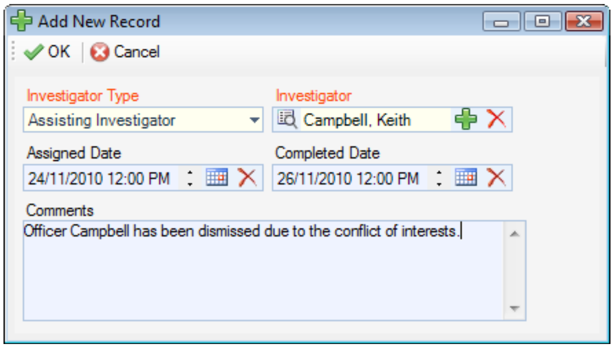
2. Specify the applicable role of the investigator in the **Investigator Type** field (e.g., Lead Investigator, Assisting Investigator, Forensic Specialist).

3. Select the name of the investigator from the **Investigator** pick list.

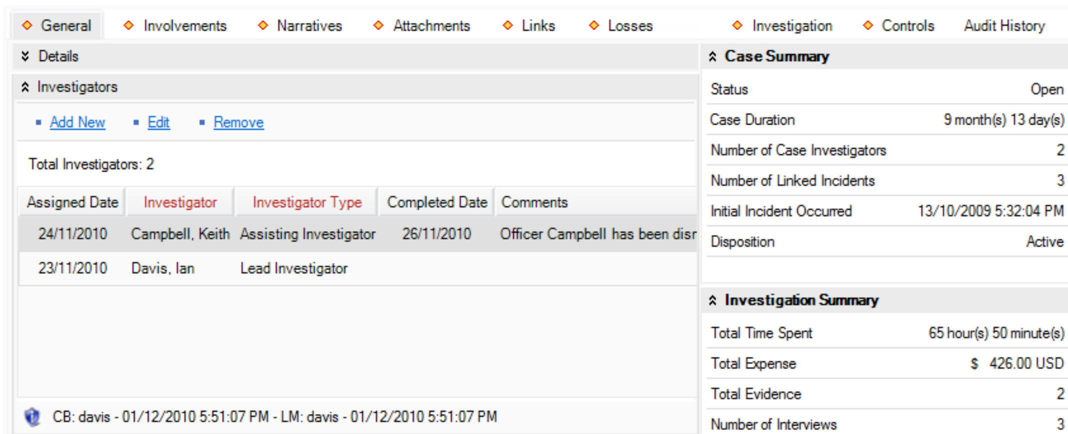
4. In the **Assigned Date** field, enter the date and time the person was assigned to the investigation team.

5. If the investigator is removed from the investigation team at some point, you may enter the applicable date and time in the **Completed Date** field.

6. Enter any relevant notes in the **Comments** field.



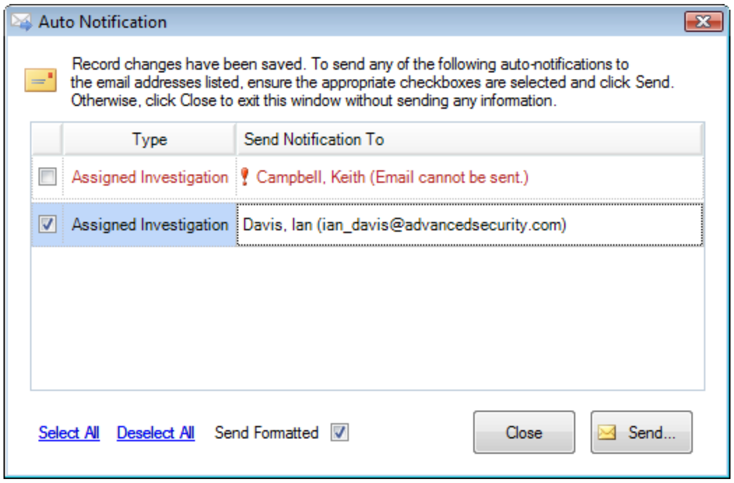
7. Click **OK** and proceed to enter as many investigators as necessary.



8. If you save the Case record changes at the time of entering a new Investigator, an Auto Notification pop-up window will appear.

- To send an email notification of the assigned investigation to the investigators, ensure the appropriate checkboxes are selected and click **Send**. Notifications are automatically sent in HTML. Deselecting the **Send Formatted** box prior to clicking Send will format the notification details in plain text rather than the default HTML table.

- If the investigator does not have a primary email address entered in the system, an error message appearing beside the investigator's name will indicate that an email cannot be sent. In this case, click **Close** to exit the window.



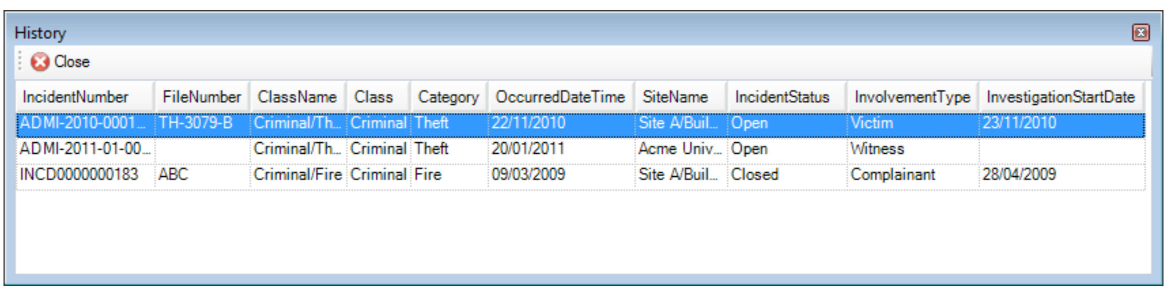
View All Case's Involvements

1. Select the **Involvements** tab.

2. Depending on the type of involvement data required, select the **Persons**, **Organizations**, **Vehicles**, or **Items** sub-tab. A list of all corresponding entities contained in the case's linked incidents, as well as their essential details, will appear in form of a grid.

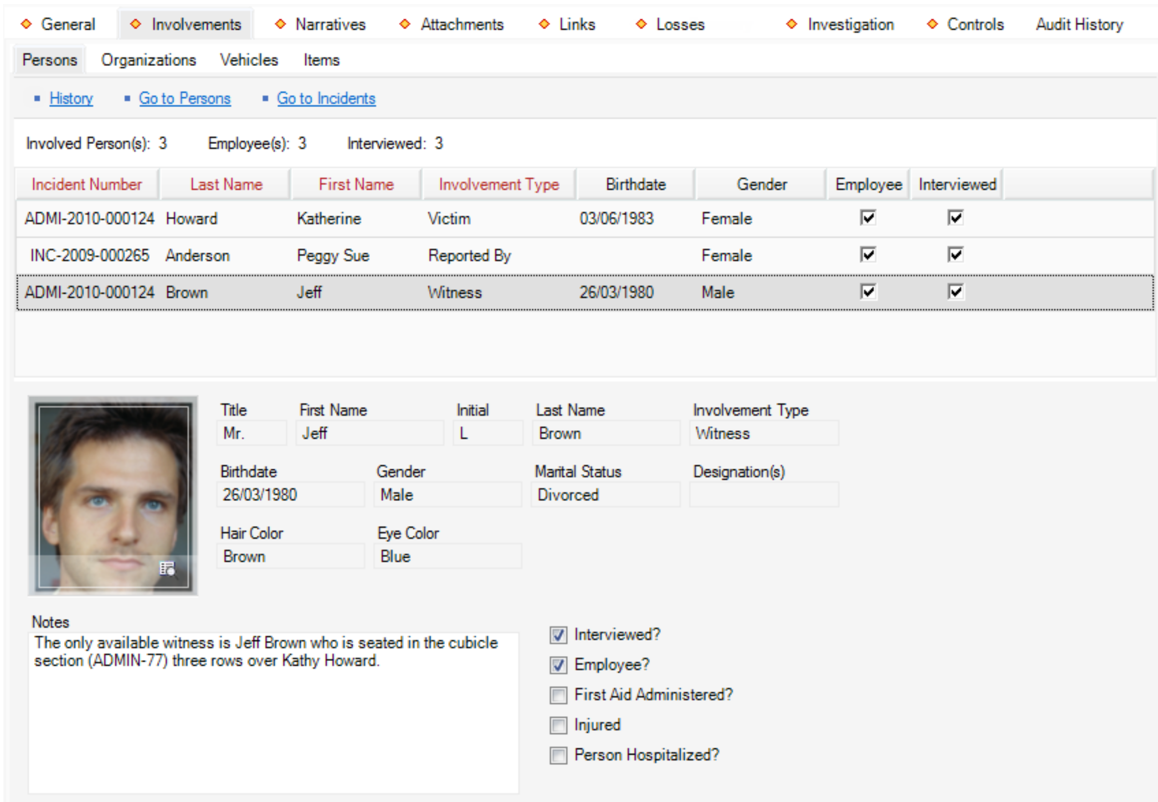
3. Select an entity in the grid to display its details in the form at the bottom of the window.

4. To view the history of the entity's involvements, select the entity in the grid, and click **History**. All incidents the entity has been involved in will be displayed in a pop-up window.



5. To transfer to an entity's main record, select the entity in the grid and then click **Go To Persons/Organizations/Vehicles/Items**. To return to the Case record, select Cases in the Navigation pane.

6. To transfer to an entity's Involvement subform within its Incident record that is linked to the currently open Case record, select the entity in the grid and click **Go To Incidents**. To return to the Case record, select Cases in the Navigation pane.



Note: If an involvement is added to multiple incidents and then you create a case with one of those incidents, the "Linked Incidents" tab will display all incidents with the involvement.

Summarize a Case or an Incident Linked to a Case

Open the **Narratives** tab and complete the operation, as described in the "Summarize an Incident or a Case" section in the "Incidents" chapter.

Attach a File to a Case Record

Open the **Attachments** tab and complete the operation, as described in the "Attach a File to a Record" section in the "Incidents" chapter.

Link an Incident to a Case

*Note: This function is also accessible via **Link New Incident***  *under the **General** tab.*

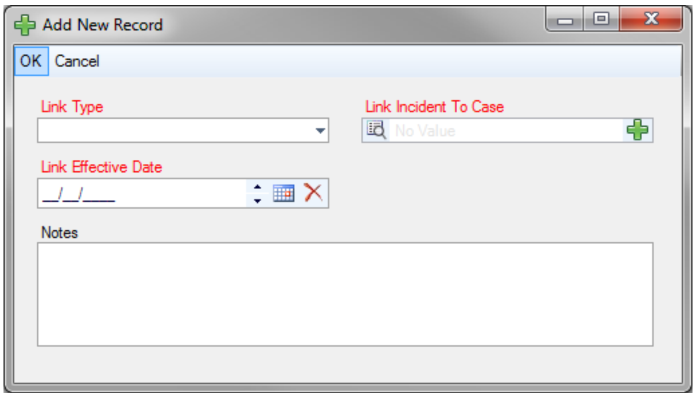
1. Select the **Links** tab.
2. In the Linked Incidents section, click **Add New**. A pop-up window will open.
3. Specify how the incident and the case are related in the **Link Type** field (e.g., Common Suspect, Similar M.O.).

4. Select the appropriate incident from the **Link Incident To Case** pick list.

5. Indicate the date that the incident became associated with the case in the **Link Effective Date** field.

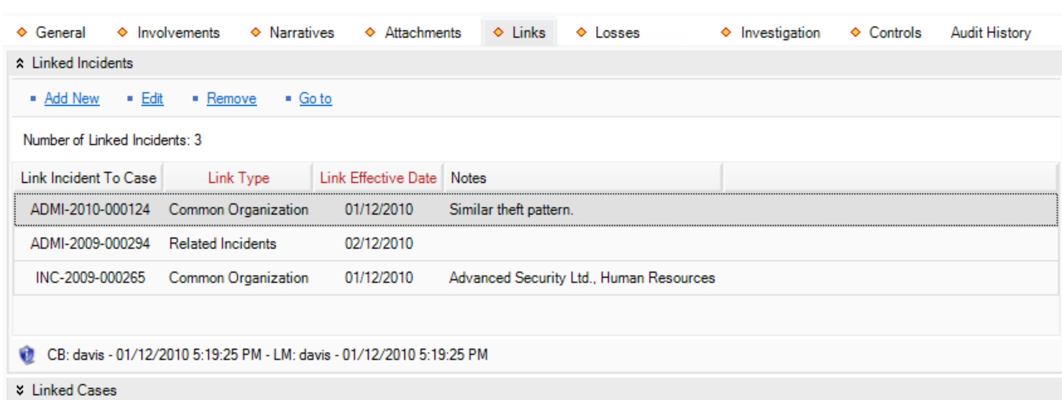
6. Type any additional information about the link in the **Notes** field.

7. Click **OK**.



8. After saving, the created link will be automatically cross-referenced in the linked Incident record under the Links tab.

   Note: The data contained in the linked Incident record (including Involvements, Narratives, Attachments, Investigation, and Loss Summary) will be automatically imported into your Case record. This will be reflected in the Summary section on the right side of the Viewing pane under the General tab.



Link a Case to Another Case

*Note: This function is also accessible via **Link New Case** under the **General** tab.*

1. Select the **Links** tab.

2. In the Linked **Cases** section, click **Add New**. A pop-up window will open.

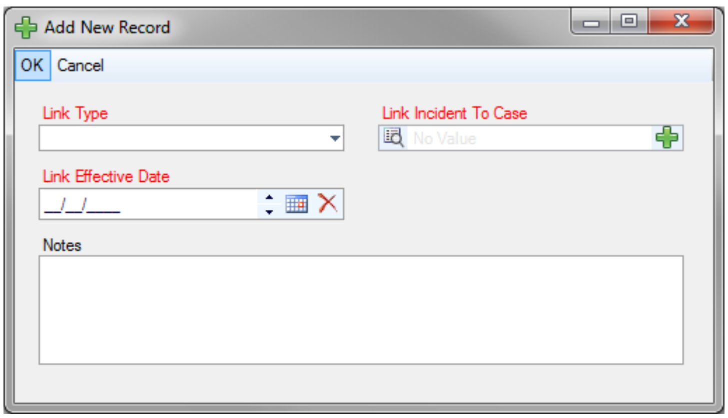
3. Specify how the two cases are related in the **Link Type** field (e.g., Common Suspect, Similar M.O.).

4. Select the case that you want to link to the open case from the **Linked To Case** pick list.

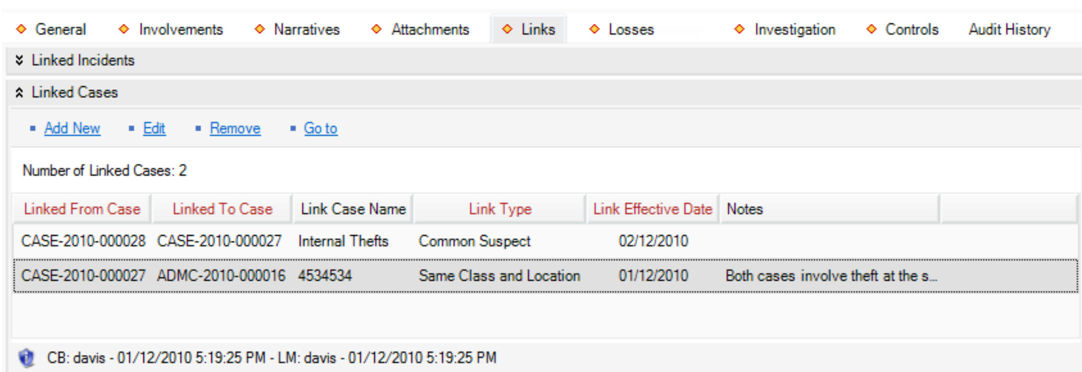
5. Indicate the date that the two cases became associated with each other in the **Link Effective Date** field.

6. Type any additional information about the link in the **Notes** field.

7. Click **OK**.



8. After saving, the created link will be automatically cross-referenced in both Case records under the Links tab.



View a Summary of Losses Involved in a Case

1. Select the **Losses** tab.

2. If involvement losses have been recorded for any of the case's linked incidents, the Loss and Recovery Details grid will display each recorded loss entry arranged by Incident ID and supplied with such information as the Date the loss was recorded, the record or sub-record type the loss has been Associated To, the Type of loss, and the relevant value of the loss by loss category (i.e., Loss, Recovery or No Impact). For optimal analysis, you may arrange the

loss entries by a column header (e.g., Associated To, Date, or Type) and change the position of the columns in the grid.

3. Click **Save** to update the summary calculations displayed to the right of the grid:

   - **Totals:**

     Total Exposure: The total value of the *Exposure No Impact* loss associated with Incident records linked to the case.

     Total Averted: The total value of the *Averted No Impact* loss associated with Incident records linked to the case.

     Total Loss: Total value of *Loss* amounts associated with Incident records linked to case.

     Total Recoveries: The total value of the *Recovery* loss associated with Incident records linked to the case.

     Net Loss: The value determined by subtracting the *Total Recoveries* amount from the *Total Loss*.

   - **Averages:**

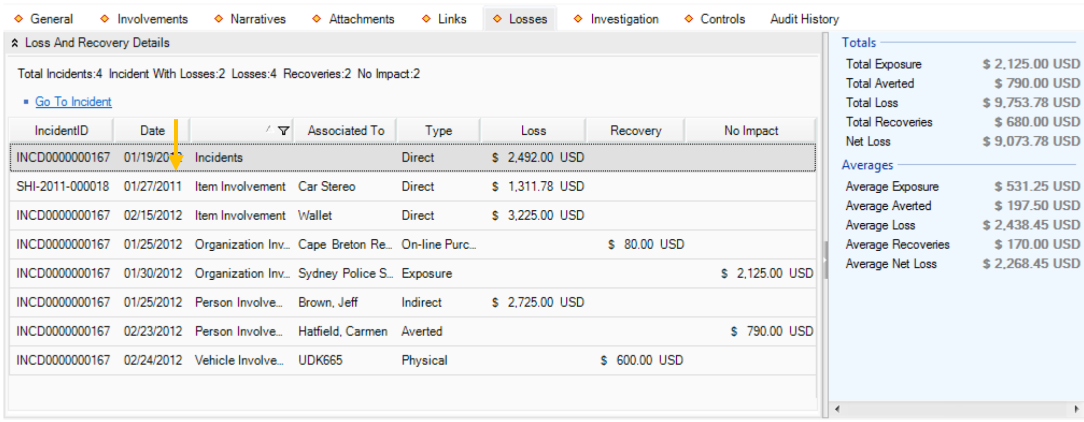
     Average Exposure: The average value of the *Exposure No Impact* loss across the Incident records linked to the case (i.e., *Total Exposure* divided by *Total Incidents*).

     Average Averted: The average value of the *Averted No Impact* loss across the Incident records linked to the case (i.e., *Total Averted* divided by *Total Incidents*).

     Average Loss: The average value of the *Loss* amount across the Incident records linked to the case (i.e., *Total Loss* divided by *Total Incidents*).

     Average Recoveries: The total value of the *Recovery* loss across the Incident records linked to the case (i.e., *Total Recoveries* divided by *Total Incidents*).

     Average Net Loss: The value determined by subtracting the *Average Recoveries* amount from the *Average Loss*.



View and Record Case Investigation Data

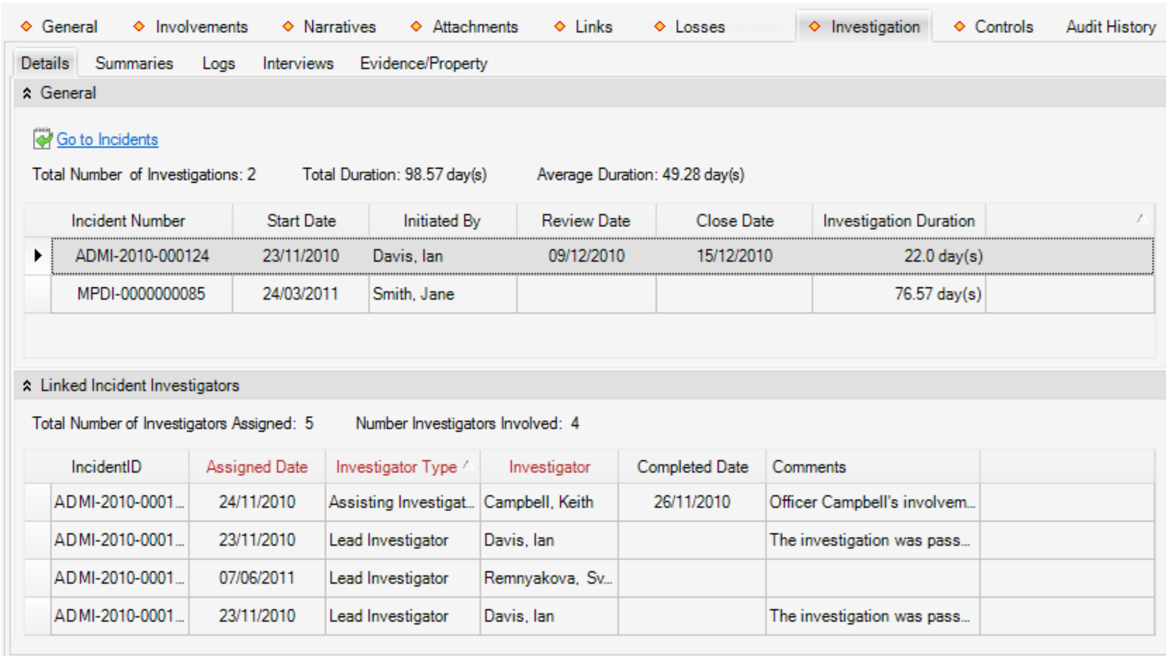
View Key Investigative Data From a Case's Linked Incidents

Select the **Investigation** tab, and then select the **Details** sub-tab.

The General section lists all incident investigations that have been linked to the case, including such details as Incident Number, name of the person who initiated the investigation (Initiated By), and Investigation Start Date, Review Date, Close Date, and Duration.

In the Linked Incident Investigators section, you will find a list of all the investigators of incidents linked to the case. The grid lists such details as Incident ID, Investigator Type, date, and time the investigator was assigned to the incident (Assigned Date), date the investigator was removed from the incident's investigation (Completed Date), and Comments.

Note: Do not confuse the Linked Incident Investigators with the Investigators that are assigned to the currently open case added under the case's General tab.



Summarize a Case's Investigation or the Investigation of an Incident Linked to a Case

Select the **Investigation** tab, the **Summaries** sub-tab, and complete the operation, as described in the "Summarize an Incident's or a Case's Investigation" section in the "Incidents" chapter.

Log Investigative Tasks and Expenses for a Case or an Incident Linked to a Case

Select the **Investigation** tab, the **Logs** sub-tab, and complete the operation, as described in the "Log Investigative Tasks and Expenses" section in the "Incidents" chapter. The summary of all tasks and expenses data associated with the related records will be calculated above the grid.

Document Investigation Interviews for a Case or an Incident Linked to a Case

Select the **Investigation** tab, the **Interviews** sub-tab, and complete the operation, as described in the "Document Investigation Interviews" section in the "Incidents" chapter.

Track Investigation Evidence for a Case or an Incident Linked to a Case

Select the **Investigation** tab, the **Evidence/Property** sub-tab, and complete the operation, as described in the "Track Investigation Evidence" section in the "Incidents" chapter.

Control a Case Record's Processing Options

For control options available for Case records, refer to the "Control Record's Processing Options" section.

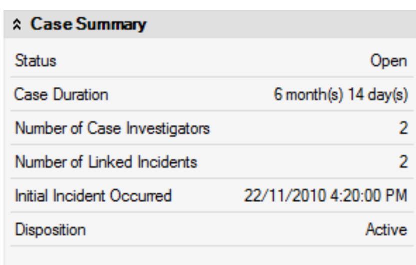
Note: The option to describe an occurrence's causes and consequences under the Outcome sub-tab is only available within the Incidents component, and is absent on a Case form.

View a Quick Summary of a Case's Key Data

As you open your Case record, click the **General** tab. Key information, summarizing data from a number of forms within the Case record, will be collected along the right side of the Viewing pane.

Case Summary

- **Status**: The status of the case (e.g., Open or Closed), drawn from the Controls tab.
- **Case Duration**: The length of the case, based on the time elapsed from the Case Start Date to the Case Closed Date (or current date if the case is not yet closed), drawn from the General tab > Details section.
- **Number of Case Investigators**: The total number of investigators assigned to the case, drawn from the General tab > Investigators section.
- **Number of Linked Incidents**: The total number of incidents linked to the case, drawn from the Links tab > Linked Incidents section.
- **Initial Incident Occurred**: The earliest date and time that any of the incidents linked to the case occurred (i.e., the earliest Occurred From Date/Time), drawn from the Links tab > Linked Incidents section.
- **Disposition**: The current standing of the case (e.g., Active, Pending Court, etc.), drawn from the Controls tab.



Investigation Summary

The data for the Investigation Summary section is drawn from the **Investigation** tab.

- **Total Time Spent**: The total number of hours spent on the case's investigation to date, plus the investigations of all incidents linked to the case, drawn from the Logs sub-tab.
- **Total Expense**: The total cost of the case's investigation to date, plus the investigations of all incidents linked to the case, drawn from the Logs sub-tab.
- **Total Evidence**: The total number of evidence pieces collected in the case's investigation to date, plus the investigations of all incidents linked to the case, drawn from the Evidence/Property sub-tab.

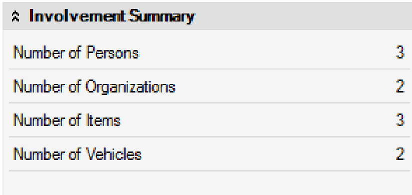
- **Number of Interviews**: The total number of interviews conducted in the case's investigation to date, plus the investigations of all incidents linked to the case, drawn from the Interviews sub-tab.
- **Number of Incident Investigators**: The total number of investigators assigned to the case's linked incidents, drawn from the Details sub-tab > Linked Incident Investigators section.
- **Total Investigation Duration**: The total length of the investigations of all incidents linked to the case, based on the time elapsed from each of their Investigation Start Dates to their Investigation Close Dates (or current date if an investigation is not yet closed), and drawn from the Details sub-tab > General section.
- **Number of Incidents Investigated**: The total number of incidents linked to the case that are undergoing (or have already undergone) investigation, drawn from the Details sub-tab > General section.
- **Incidents Not Investigated**: The total number of incidents linked to the case that are not undergoing (or have not undergone) investigation, determined by subtracting the Number of Incidents Investigated (stated above) from the Number of Linked Incidents (listed in the preceding Case Summary section).

Investigation Summary	
Total Time Spent	71 hour(s) 15 minute(s)
Total Expense	$ 2,426.00 CDN
Total Evidence	3
Number of Interviews	3
Number of Incident Investigators	5
Total Investigation Duration	98.57 days
Number of Incidents Investigated	2
Incidents Not Investigated	0

Involvement Summary

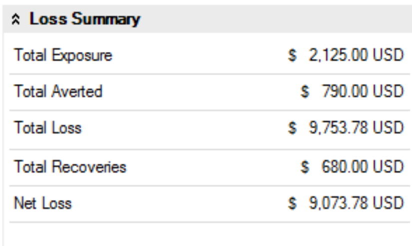
The data for the Involvement Summary section is drawn from the Involvements tab.

- **Number of Persons**: The total number of involved persons from all the incidents linked to the case, drawn from the Persons sub-tab.
- **Number of Organizations**: The total number of involved organizations from all the incidents linked to the case, drawn from the Organizations sub-tab.
- **Number of Items**: The total number of involved items from all the incidents linked to the case, drawn from the Items sub-tab.
- **Number of Vehicles**: The total number of involved vehicles from all the incidents linked to the case, drawn from the Vehicles sub-tab.



Loss Summary

The data for the Loss Summary section is drawn from the **Losses tab** > **Totals** section.



Track Changes Made to a Case Record

Open the **Audit History** tab and complete the operation, as described in the "Track Changes Made to a Record" section in the "Incidents" chapter.

Activities

Create a New Activity Record

Generally, activities are created and dispatched using the DispatchLog module embedded in Perspective (see *Perspective DispatchLog* for more information). Once an activity is closed in DispatchLog, it is transferred to the main Activities database in Perspective, maintaining any information that has been recorded in DispatchLog. The information that is imported from DispatchLog includes general activity details, location and responsible persons, officers' and organizations' responses, involvements, attachments, activity notes, and the basic Controls options (i.e., Activity Status, Owner Workgroup, Access Level, and Workgroup Visibilities). However, if required, an Activity record may be created from scratch within the centralized database in Perspective.

1. Click the **Add** button in the Viewing pane toolbar.

2. Indicate when the activity was reported to supervisors under **Reported Date/Time**. By default, the field will populate with the current date and time.

3. Indicate when the activity call was assigned to an officer or organization under **Assigned Date/Time**.

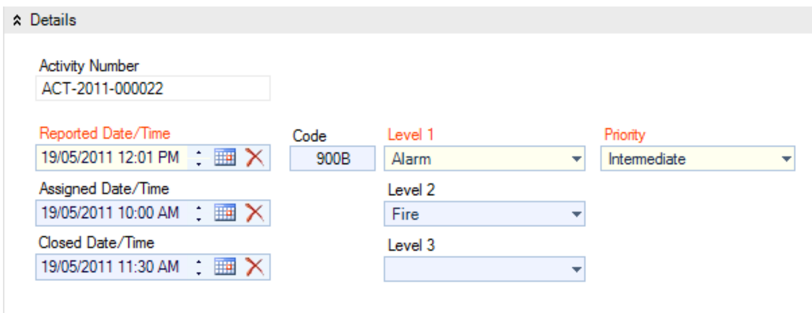
4. Select the activity category under the **Level 1**, **Level 2**, and **Level 3** lookups. These fields are hierarchical, meaning that the option selected in the first field (i.e., Level 1) determines

the options that are available in the second field (i.e., Level 2), and so on. The options that appear in these lists have been customized by your organization.

5. Depending on the category specifications selected for the activity, the system will build the appropriate activity Code. Alternatively, you may quickly enter the code to auto-populate the activity category Levels.

6. Specify the **Priority** for the activity, selecting from the lookup options. The default value in the Priority field is determined by the category specifications/code selected for the activity.

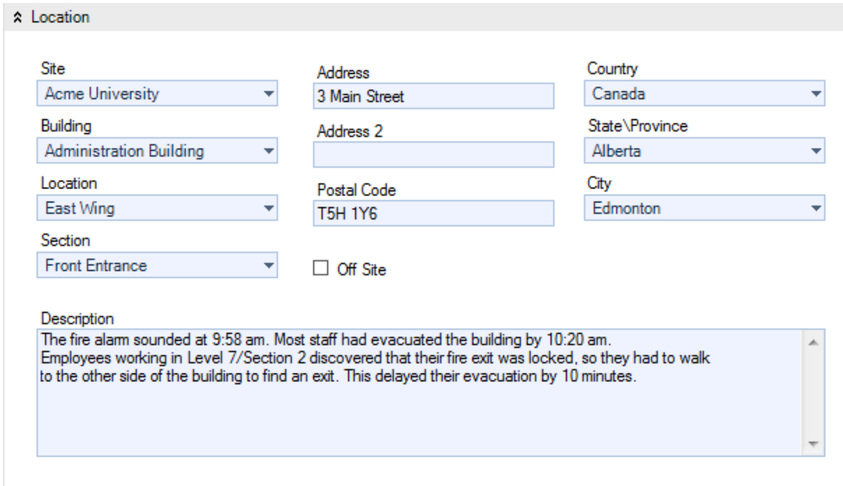
7. If the activity has been closed, enter the date of its closure in the **Closed Date/Time** field. For the Activity records that have previously been closed within the DispatchLog, this field will already contain the date of closure.



8. Specify the location of the activity by making selections from the **Site**, **Building**, **Location**, and **Section** lookup lists.

9. The address fields (i.e., **Address**, **Address 2**, **Postal Code**, **Country**, **State/Province**, and **City**) will automatically populate according to the site specifications entered. Alternatively, you may enter/edit the address manually. If the activity took place off site, mark the corresponding checkbox and enter the exact address of the off-site activity location.

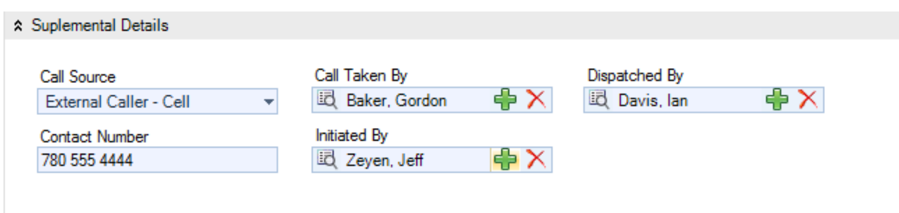
10. In the **Description** text field, type in a detailed description of the activity.



11. In the Supplemental Details section, select the **Call Source** for the activity (e.g., Alarm, External Caller – Cell).

12. Click the corresponding **Add** icons and select the names of the following responsible persons:

   - **Call Taken By**—The user who is responsible for recording the call. Usually, the call taker is the person who creates the original Activity record.
   - **Initiated By**—The user who initiated the call and provided basic information for creation of the activity. Enter the initiator's **Contact Number** in the field on the left.
   - **Dispatched By**—The person who dispatches officers/organizations for the activity.



13. To enter a brief update to the activity's disposition or status, type the notes in the **Activity Notes** text box and click **Add** Notes. Each note will be supplied with a date stamp and the user name of the reporting person.

   Note: Perspective will automatically supply the Activity record with an Activity Number when the record is saved.

Record an Officer's Response to an Activity

1. Select the **Responses** tab.
2. Select the **Officer Responses** sub-tab.
3. Click **Add New**. A pop-up window will open.

4. Select the responding officer's record from the **Officer Name** pick list.

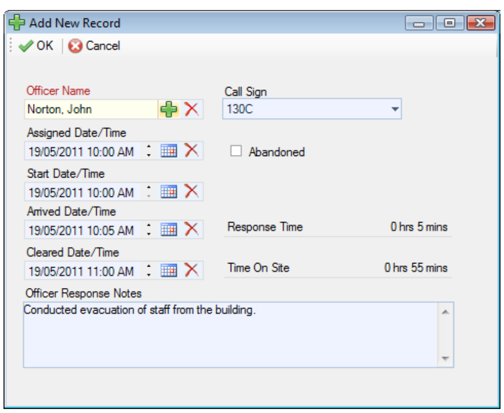
5. The **Call Sign** field will auto-populate with the selected officer's call sign abbreviation.

6. Track the temporal progress of the officer's response specifying the following time points:

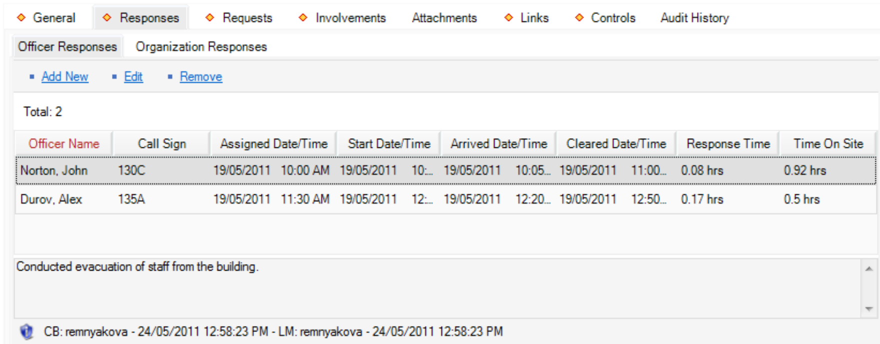
   - **Assigned Date/Time**—The date and time the officer was dispatched for the activity.
   - **Abandoned**—Check the **Abandoned** box if the officer has been assigned to the activity, but did not manage to carry out the response tasks due to the reassignment for another activity, or if they did not arrive at the site of the activity.
   - **Start Date/Time**—The date and time the officer started to respond to the activity.
   - **Arrived Date/Time**—The date and time the officer arrived on the activity's site.
   - **Cleared Date/Time**—The date and time the officer completed the activity and vacated the site.

7. Once the appropriate dates and times have been entered, the system will calculate how long it took the officer to respond (Response Time) and how long they remained on site (Time On Site).

8. Enter any additional information about the officer's response in the **Officer Response Notes** text box.



9. Click **OK**. The new officer's response entity will be saved as an entry in the Officer Responses grid.



Record an Organization's Response to an Activity

1. Select the **Responses** tab.

2. Select the **Organization Responses** sub-tab.

3. Click **Add New**. A pop-up window will open.

4. Select the responding organization's record from the **Organization** pick list. If the corresponding Organization record does not already exist, use the Quick Add function to create one.

5. The Organization Name field will now automatically populate with the linked organization's name. Depending on the data available, some additional fields may also populate with information drawn from the linked Organization record.

6. To add the organization's logo to the record, click the **Add** icon in the image box.

7. Locate the image file in the browser window and click **Open**.

8. Specify the category of the organization's response (e.g., Emergency Service, Responding Service/Agency, Indirectly Involved) by selecting a description from the **Involvement Type** lookup list.

9. If applicable, input the organization's file, ID, or other tracking number in the **Organization Number** field.

10. Select the applicable **Organization Type** from the lookup list.

11. Specify the mode by which the organization has been notified of the activity in the **Notified By** lookup list.

12. If there is any documentation associated with the organization's response to the activity (e.g., a work order), note the associated tracking number in the **Reference Number** field.

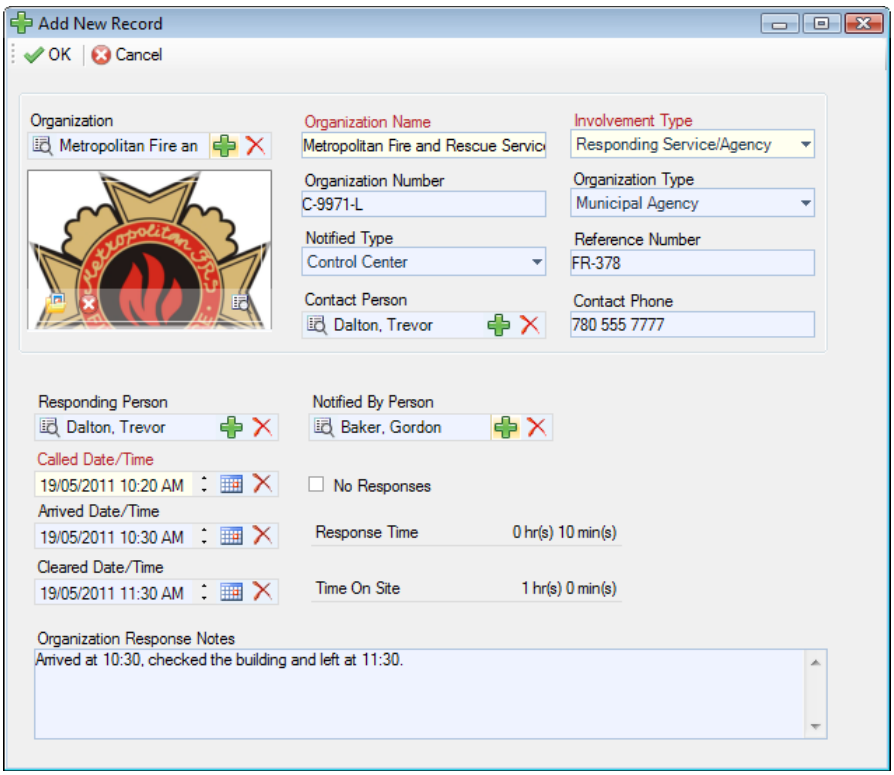
13. Select the name of the organization's primary contact from the **Contact Person** pick list. If a Person record does not already exist for the individual, use Quick Add to create one.

14. Enter the contact person's phone number under **Contact Phone**.

15. Select the record of the person in the organization who responded to the activity from the **Responding Person** pick list and the record of the person who called the organization from the **Notified By Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

15. Track the temporal progress of the organization's response by specifying the following time points:

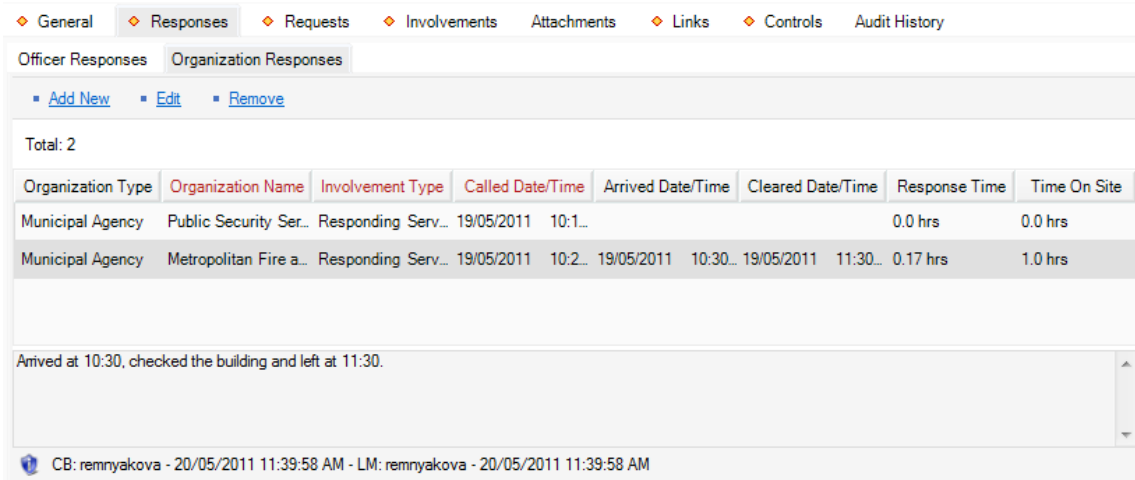
    - **Called Date/Time**—The date and time the organization was contacted about the activity. Check the **No Responses** box if the organization did not respond.
    - **Arrived Date/Time**—The date and time the organization arrived on site.
    - **Cleared Date/Time**—The date and time the responding organization vacated the site after having had completed the response.



16. Once the appropriate dates and times are entered, the system will calculate how long it took the organization to respond (Response Time) and how long they remained on site (Time On Site).

17. Enter any additional information about the organization's response in the **Response Notes** text box.

18. Click **OK**. The new organization's response entity will be saved as an entry in the Organization Responses grid.



Note an Action Request for an Activity

1. Select the **Requests** tab.
2. Select **Add New**. A pop-up window will open.
3. Select the requested organization's record from the **Organization** pick list. If the corresponding Organization record does not already exist, use the Quick Add function to create one.
4. The **Organization Name** field will now automatically populate with the linked organization's name. Depending on the data available, some additional fields may also populate with information drawn from the linked Organization record.
5. To add the organization's logo to the record, click the **Add** icon in the image box.
6. Locate the image file in the browser window and click **Open**.
7. Specify the type of services offered by the requested organization selecting a description from the **Involvement Type** lookup list.
8. If applicable, input the organization's file, ID, or other tracking number in the **Organization Number** field.
9. Select the applicable **Organization Type** from the lookup list.
10. Specify the mode by which the action has been requested in the **Notified Type** lookup list (e.g., via Perspective DispatchLog, Investigator, or Control Center).
11. Note the organization's associated **Reference Number**.

12. Select the name of the requested organization's primary contact from the **Contact Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

13. Enter the contact person's phone number under **Contact Phone**.

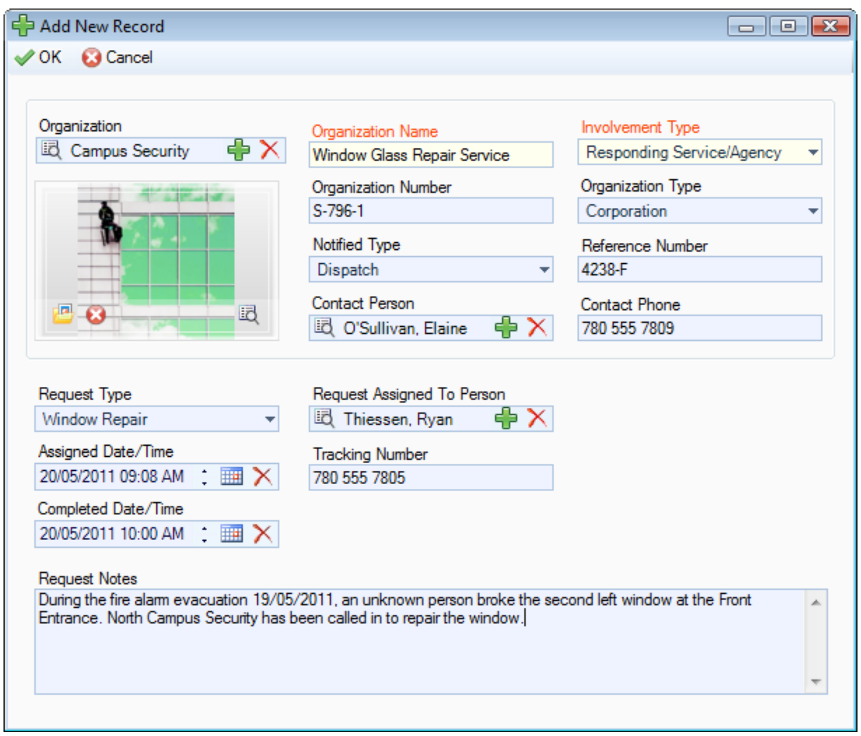
14. Choose the appropriate description for the requested action (e.g., Maintenance, Escort, Window Repair) from the **Request Type** lookup list.

15. Select the record of the person who has been administered the request from the **Request Assigned To Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

16. Enter the date and time the request was made in the **Assigned Date/Time** field.

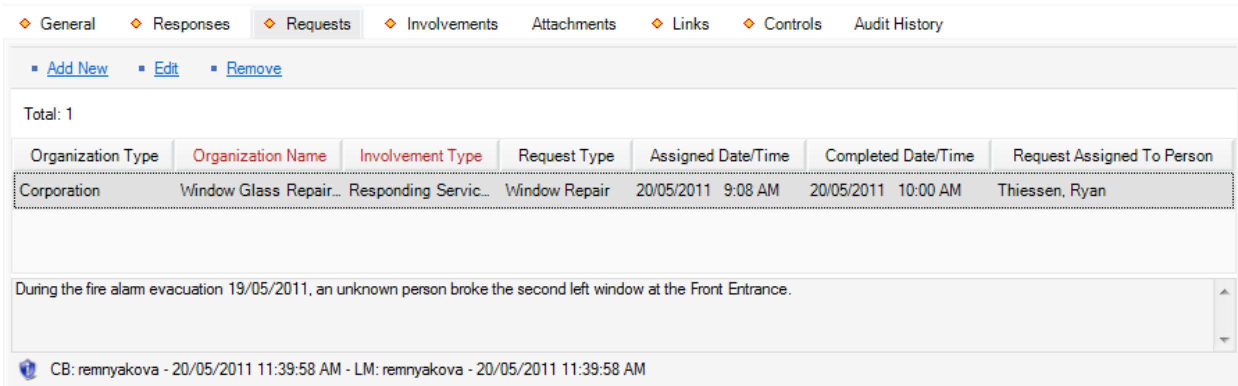
17. When the action is complete, input the **Completed Date/Time**.

18. If there is a tracking or other ID number assigned to the action request, enter it in the **Tracking Number** field.



19. Enter any additional **Request Notes**.

20. Click **OK**. The new action request entity will be saved as an entry in the Organization Responses grid.



Identify All Persons Involved in an Activity

The Persons sub-tab in the Involvements tab provides space to record persons that have been involved in the selected activity. The procedures of identifying persons involved in an activity are identical to the processes described for Incident records with one exception: in an Activity record, there is no option to add a loss or recovery associated with the involved person. For details, please refer to the "Identify All Involved Persons" section.

Identify All Organizations Involved in an Activity

The Organizations sub-tab in the Involvements tab provides space to record organizations that have been involved in the selected activity. The procedures of identifying organizations involved in an activity are identical to the processes described for Incident records with one exception: in an Activity record, there is no option to add a loss or recovery associated with the involved organization. For details, please refer to the "Identify All Involved Organizations" section.

To note an action request sent to the organization, use the options under the Requests tab. For details, refer to the "Note an Action Request for an Activity" section.

To log the organization's response to the activity, use the options under the Responses tab. For details, refer to the "Record an Organization's Response to an Activity" section.

Document All Vehicles Involved in an Activity

The Vehicles sub-tab in the Involvements tab provides space to record vehicles that are involved in the selected activity. The procedures of identifying these vehicles are identical to the processes described for Incident records with one exception: in an Activity record, there is no option to add a loss or recovery associated with the involved vehicle. For details, please refer to the "Document All Involved Vehicles" section.

Identify All Items Involved in an Activity

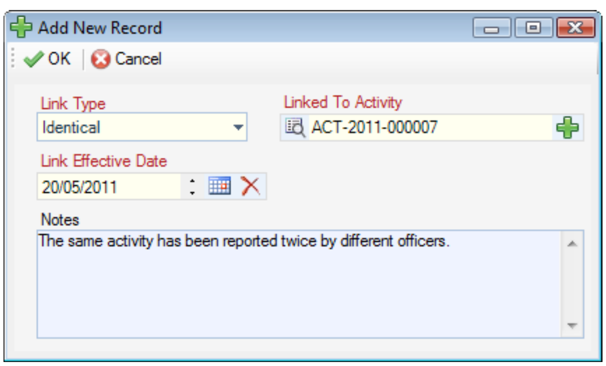
The Items sub-tab in the Involvements tab provides space to record items that are involved in the selected activity. The procedures of identifying these items are identical to the processes described for Incident records with one exception: in an Activity record, there is no option to add a loss or recovery associated with the involved item. For details, please refer to the "Identify All Involved Items" section.

Attach a File to an Activity Record

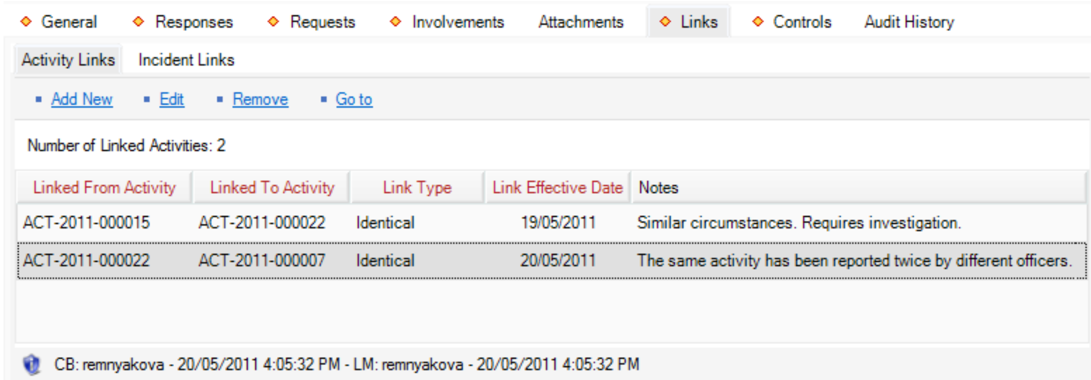
Open the **Attachments** tab and complete the operation, as described in the "Attach a File to a Record" section in "Incidents" chapter.

Link an Activity to Another Activity

1. Select the **Links** tab.
2. Select the **Activity Links** sub-tab.
3. Click **Add New**. A pop-up window will open.
4. Specify how the two activities are related in the **Link Type** field (e.g., Identical, Common Location).
5. Select the activity that you want to link to the open activity from the **Linked to Activity** pick list.
6. Indicate the date that the two activities became associated with each other in the **Link Effective Date** field.
7. Type any additional information about the link in the **Notes** field.
8. Click **OK**.



9. After saving, the created link will be automatically cross-referenced in both Activity records under the Links tab. To review a complete record of an activity linked to the currently open activity, select the correct link from the list of Linked Activities and click **Go To**.



Link an Activity to an Incident

1. Select the **Links** tab.

2. Select the **Incident Links** sub-tab.

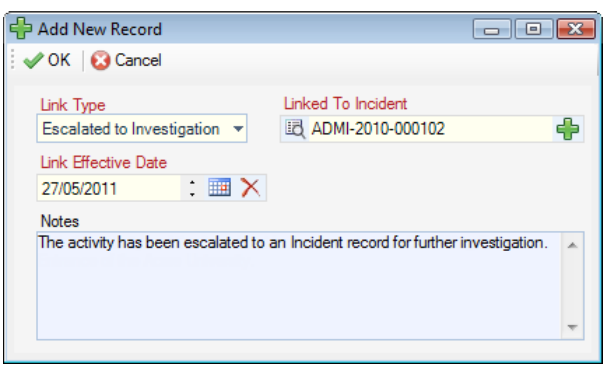
3. To create the link between an existing Incident record and your Activity record, click **Add New**. A pop-up window will open.

4. Specify how the activity and the incident are related in the **Link Type** field (e.g., Escalated to Investigation, Follow-up).

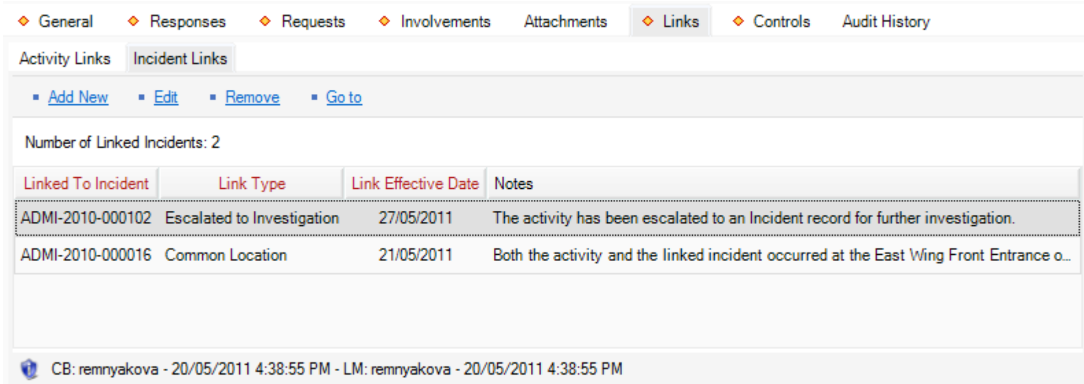
5. Select the appropriate incident from the **Linked To Incident** pick list.

6. Indicate the date that the activity became associated with the incident in the **Link Effective Date** field.

7. Type any additional information about the link in the **Notes** field.



8. Click **OK**. After saving, the created link will be automatically cross-referenced in the linked Incident record under the Links tab.



Control an Activity Record’s Processing Options

Set the Security Controls and Status of the Activity Record

1. Select the **Controls** tab; the Details sub-tab will open by default.

2. In the Controls section, fill out the **Org Level** fields to set the record visibility settings for the various hierarchically organized groups within your organization. Only users with organizational rollups corresponding to, or higher than, the organizational rollup you select for the record will have access to it.

3. In the **Access Level** field, set the security level from 1 to 5. Each security level corresponds to a specific security description, such as “Classified”. Only users with the same security Access Level as the one you select (or higher) will be able to view the record.

4. Set the **Activity Status** to one of the following descriptors:

   - **Open - Report Required**—The meaning of “open” is dependent on your organization’s definition of this status. Generally, an open record means that it is actively being worked on or, possibly, is inactive for a finite amount of time. This status would normally be assigned to an open activity that requires additional information.

   - **Closed - Report Completed**—The meaning of “closed” is dependent on your organization’s definition of this status. Generally, a closed status means that the record is no longer being worked on due to completion or inactivity for an indefinite amount of time. This status would normally be assigned to a closed activity that is no longer being worked on and that contains a report.

   - **Closed - No Report**—This status would normally be assigned to a closed activity that is no longer being worked on and that does not contain a report.

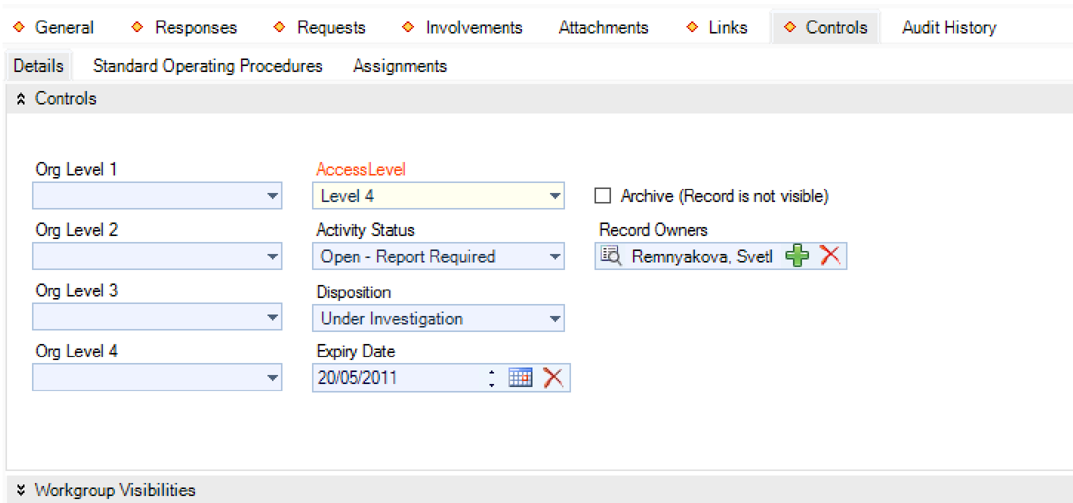
5. Select the most appropriate description of the activity’s current standing in the **Disposition** field (e.g., Inactive, Under Investigation, Waiting for Approval).

6. From the Record Owner pick list, select the Person record that corresponds to the individual who is responsible for the closing the record. If a Person record does not already exist for this individual, use the Quick Add function to create one.

7. If you want to archive the Activity record making it unavailable for users to access, check the **Archive (Record is not visible)** box.

8. If any policy, legislation, or business rule pertinent to your organization's procedures requires information about the record, or the persons involved in the record, to be kept for a certain length of time, enter the end date of that period in **Expiry Date**.

   Note: No information will automatically be deleted on this date; it is for tracking purposes only.



Define Which Workgroups Can Access the Activity Record

In the Workgroup Visibilities section of the Details sub-tab, define access options for the record, as described in the "Define Which Workgroups Can Access the Record" section in the "Incidents" chapter.

Review the Standard Operating Procedures for the Activity Record's Specifications

Note: The function to review the Standard Operating Procedures (SOPs) for an Activity record is only available if the Activity's specifications correspond to a SOP that was previously recorded in the Administration component of Perspective. For further details, see the Perspective Administrator's Guide. If the Standard Operating Procedures sub-tab is absent, then there are no specific procedures to follow for this type of activity.

1. Select the **Controls** tab.

2. Select the **Standard Operating Procedures** sub-tab.

3. Review the **Procedure Description** of the Standard Operating Procedures (SOP) available for the activity's Call Category, Site, and/or Status.

4. Check off the SOP procedures that have been completed under **SOP Checklist**.

5. Click **Save**.

6. View the relevant **SOP Attachments** by double-clicking on them.

7. Click on the individual **SOP Links** to open the related network locations, files, or Web links.

8. To view mass notifications and/or individual email notifications that have been sent in relation to the activity, click on the **View Details** and the **View Email** hyperlinks correspondingly. The record of the selected notification will appear in a separate window.

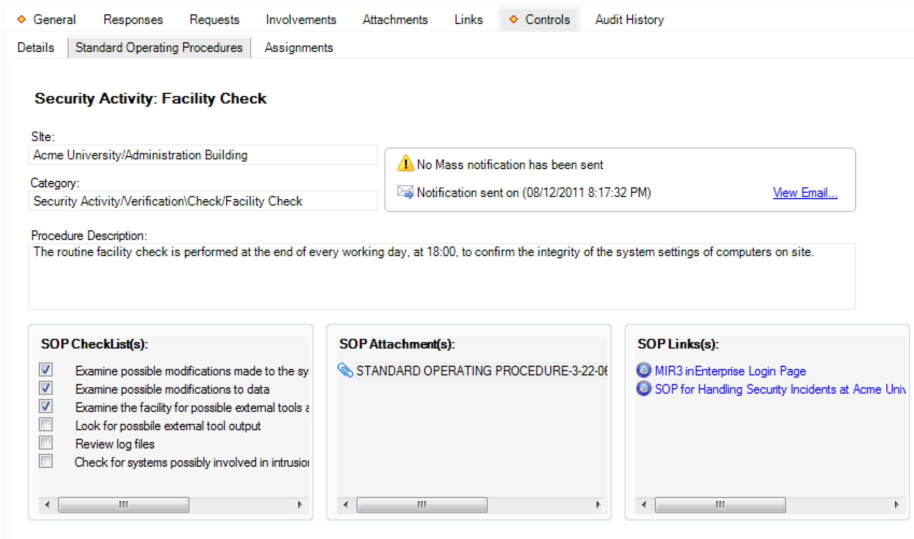


Figure 3.5.15: Reviewing SOPs for an Activity record's specifications

Give an Activity-Related Assignment to Another User

In the Assignments sub-tab, give an activity-related assignment to another user, as described in the "Give a Record-Related Assignment to Another User" section in the "Incidents" chapter.

Track Changes Made to an Activity Record

Open the Audit History tab and complete the operation, as described in the "Track Changes Made to a Record" section in the "Incidents" chapter.

Escalate an Activity Record to an Incident

If an Activity record has exceeded the scope of the provided Activity data form functions and requires a more detailed analysis and investigation, you may escalate it to a full-fledged Incident record on the basis of the information stored in the original Activity record.

To perform this operation, click on the **Create Incident**  button on the Viewing pane and complete the remaining Incident form data, as described in the "Incidents" chapter. All the data contained in the original Activity record that matches a regular Incident form will be copied to the new Incident record, while the Activity Notes will be saved as unsealed *Original Activity Notes* under the Narratives tab.

Click **Save** to assign the new Incident record an Incident Number and save it in the system. The new Incident record creation information will be documented under the Audit History tab as a *new* record action.

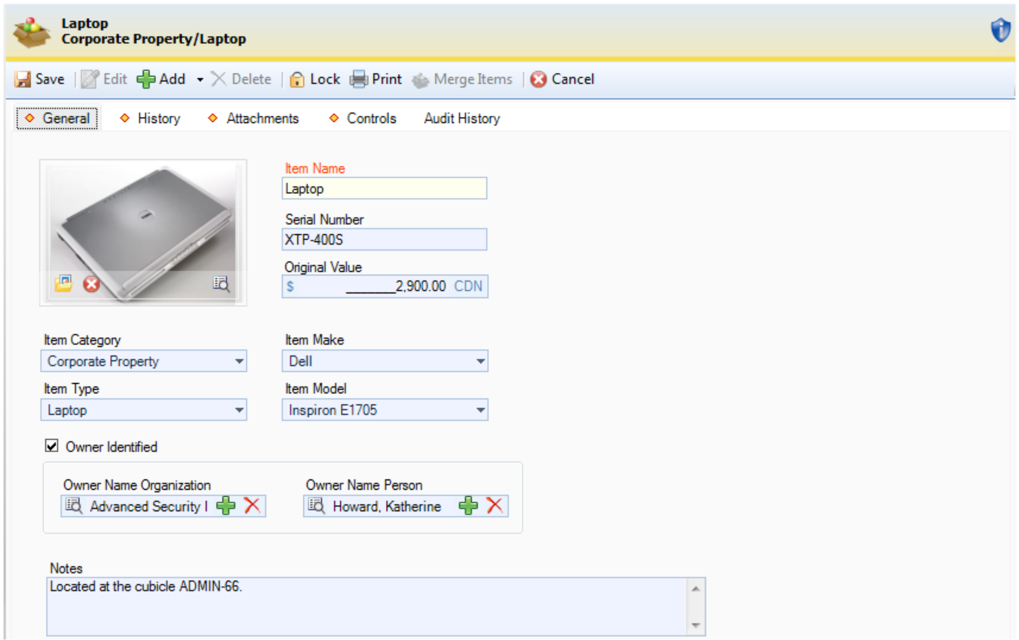
Note: The original Activity record will remain intact.

Items

Create a New Item Record

Perspective provides two ways to create a new Item record: with the help of the standard Add function, and by importing an Item record from the Gateway. To create an Item record using the standard Add function, follow the steps described below.

1. Click the **Add** button on the Viewing pane toolbar.
2. Give the item a descriptive **Item Name**.
3. If known, type in the item's **Serial Number**.
4. Enter the item's exact or estimated value in the **Original Value** field.
5. Identify the general classification of the item by making selections from the **Item Category** and **Item Type** lookup lists. These fields are hierarchical.
6. Specify the **Item Make** and **Item Model**. These fields are hierarchical.
7. If the item's owner is known, check the **Owner Identified** box.
8. Then, select the name of the organization or person that owns the item from either the **Owner Name Organization** or **Owner Name Person** pick lists. If an Organization or Person record does not already exist, use the Quick Add function to create one.
9. Add comments about the item in the **Notes** field.
10. To add an image of the item to the record, click the **Add** icon in the image box.
11. Locate the image file in the browser window and click **Open**.



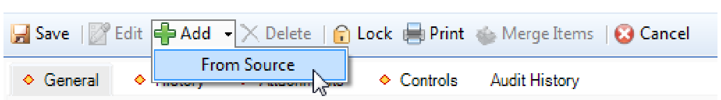
To import a record from the Gateway, consult the "Import Record's Settings From the Gateway" section.

Import Record's Settings from the Gateway

The function to add a record by importing it from the Gateway is an additional method of creating a record that complements the standard method of the **Add** button. Both can be accessed from the Viewing pane toolbar.

1. Open the appropriate data form.

2. Click the small arrow to the right of the Add icon, and select **From Source**. The Import pop-up window will appear.



3. Select the **Gateway** sub-tab, if it is not displayed by default.

4. To display the top 1000 imported records that have been added to Perspective or are available to be added, click **Search**.

   Note: Only items with the Available status in Gateway will be searched and displayed.

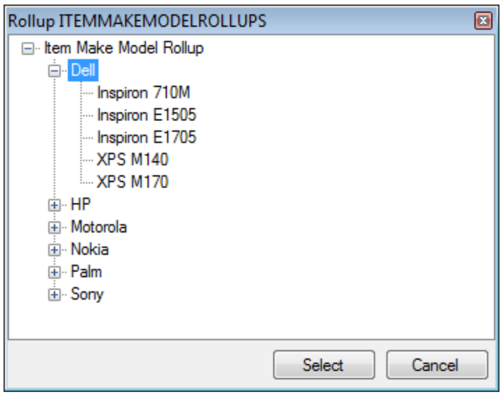
5. To search for a particular imported record, set specific search criteria:

   a. In the **Field Name** lookup list, select the field that you want to set as the main criterion for narrowing your results.

   b. Choose an **Operator** for the field (e.g., =, <>, Starts With, Ends With, Like).

c. Enter the compared criterion **Value**. If the Selector button is available, click it to display a tree of Value options in a separate window.

Note: You may choose any node of the tree as the defining criterion, making your comparison value as narrow hierarchically as you want.



d. If you want to include a second field as an additional search criterion, select the **And** or **Or** radio buttons and complete the Field Name, Operator, and Value fields below. You may add as many search criteria as you want. To remove a field from your search criteria, click the Delete button .

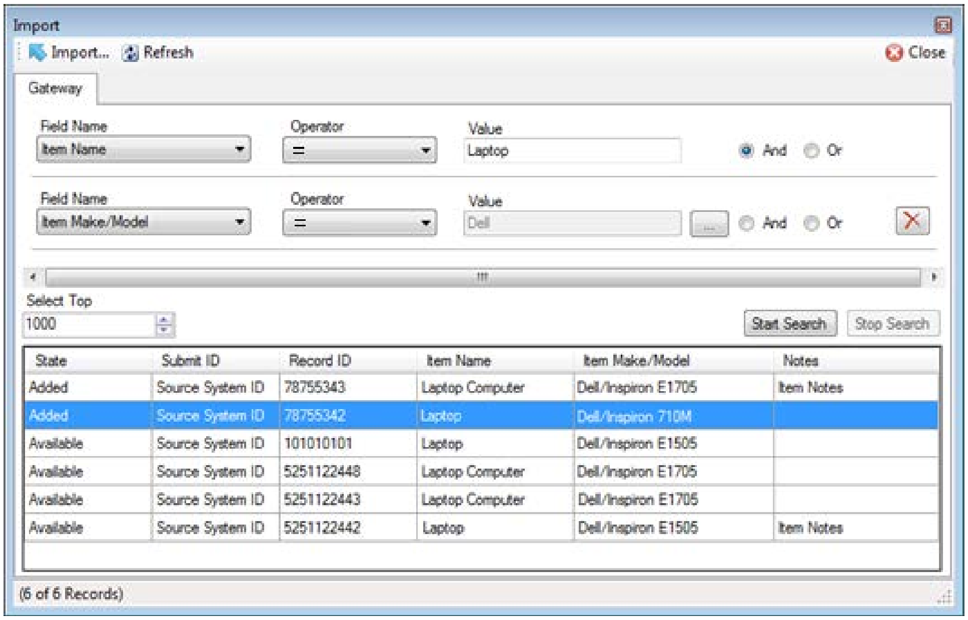
e. By default, your search will display the top 1000 imported records matching the criteria that you set. To display more or less than the top 1000 records, adjust the number in the **Select Top** field (from 1 to 2000).

f. Click **Search** to generate a list of records matching your search criteria. A count of the number of records in the list, as well as the total number of imported records matching your search criteria, will be displayed at the bottom of the window.

   To make changes to the ongoing search, click **Stop Search** first, and then make the necessary changes to the search criteria.

   If you change your search criteria at some point, click **Refresh** to update the record list according to the changes made.

6. Choose the correct record from the list and click **Import** . The pop-up window will close and the form fields of the new record will automatically populate with the selected record's information. To cancel the selection at any time, click **Close** .



View Record's Incident Involvements

1. Select the **History** tab. The Activity History sub-tab opens with a list of entities (i.e., Persons, Organizations, Vehicles, and Items) that have been involved in the record you are viewing.

   a. The Incident History sub-tab displays a list of any modifications that have been made to the record since its creation.

2. To link all of an incident in the grid to a case (Perspective ICM and EIM only), select any incident in the grid and click **Add to Case**. A pop-up window will open.

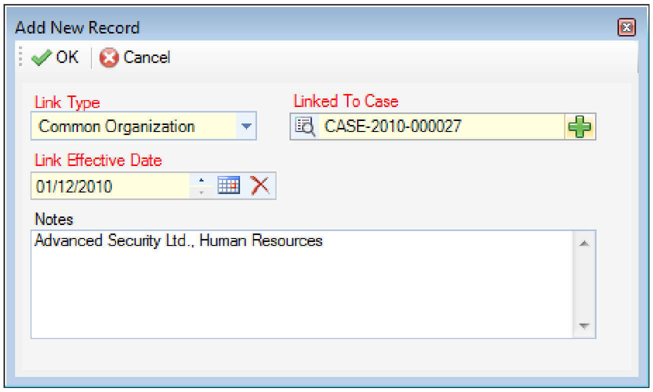
3. Specify how the incidents are related to the case in the **Link Type** field (e.g., Similar M.O., Same Class, Location).

4. Select the appropriate case from the **Linked to Case** pick list.

5. Indicate the date that the incidents became associated with the case in the **Link Effective Date** field.

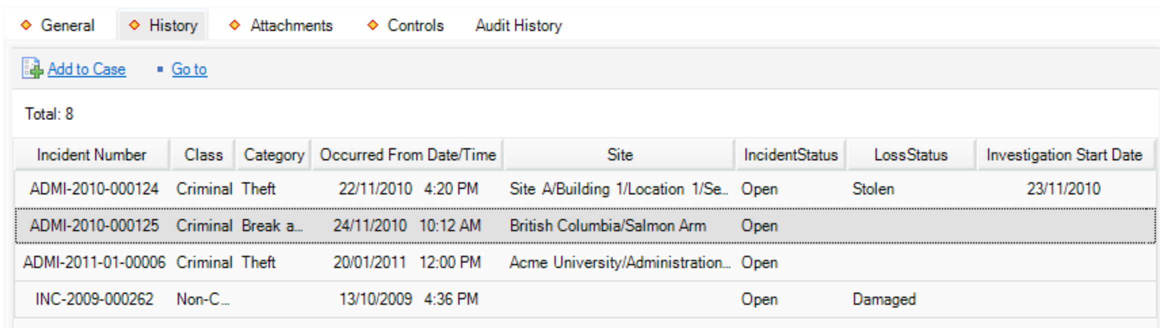
6. Type any additional information about the link in the **Notes** field.

7. Click **OK**.



8. Click **Save**.

   Note: These links will automatically be cross-referenced in the linked case's record, as well as in each of the linked incidents' records, under the Links tab.



Attach a File to an Item Record

Open the Attachments tab and complete the operation, as described in the "Attach a File to a Record" section in the "Incidents" chapter.

Control Record's Processing Options

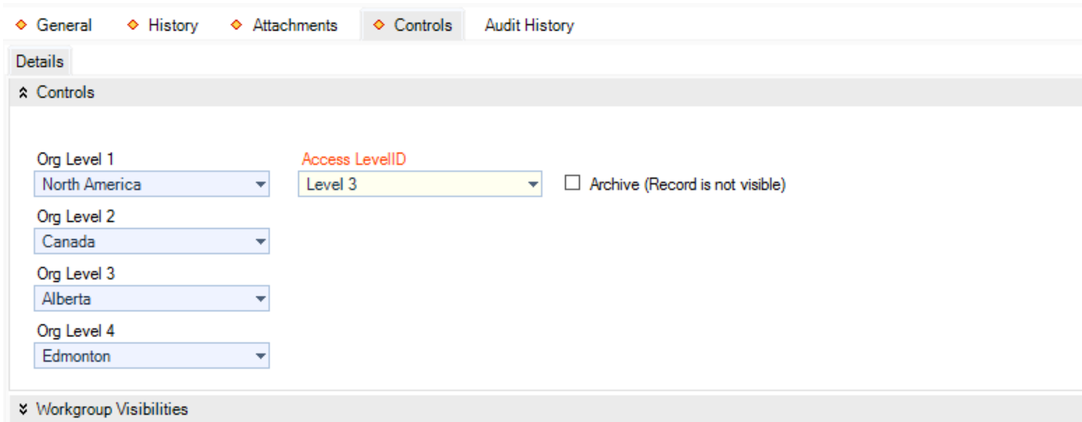
Set the Security Controls and Status of the Record

1. Select the **Controls** tab; the Details sub-tab will open by default.

2. In the Controls section, fill out the **Org Level** fields to set the record visibility settings for the various hierarchically organized groups within your organization. Only users with organizational rollups corresponding to or higher than the organizational rollup you select for the record will have access to it.

3. In the Access Level field, set the security level from 1 to 5. Each security level corresponds to a specific security description, such as "Classified". Only users with the same security Access Level as the one you select (or higher) will be able to view the record.

4. If you want to archive the record making it unavailable for users to access, check the **Archive (Record is not visible)** box.



Define which workgroups can access the record

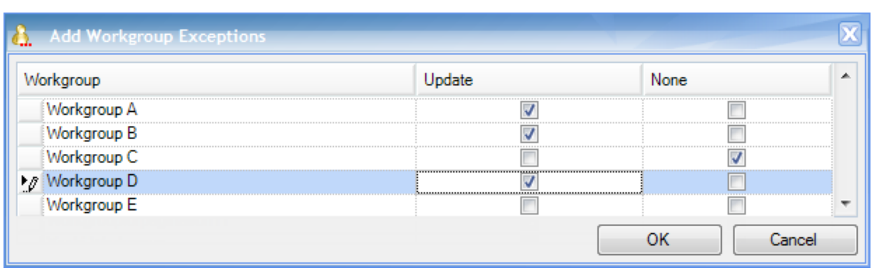
1. In the **Workgroup Visibilities** section, give one workgroup the ability to read and modify the record by selecting them under **Owner Workgroup (Full Rights)**. Initially, the field will contain the name of your default workgroup. Once you attempt to change it, the system will display a confirmation dialog asking you if the "Full Access" rights that belong to the original owner workgroup should be transferred to the workgroup you have chosen. Click **OK** if the change was intentional.

2. Determine the access right for All Other Workgroups, selecting from the Read, Update, or None access right options.

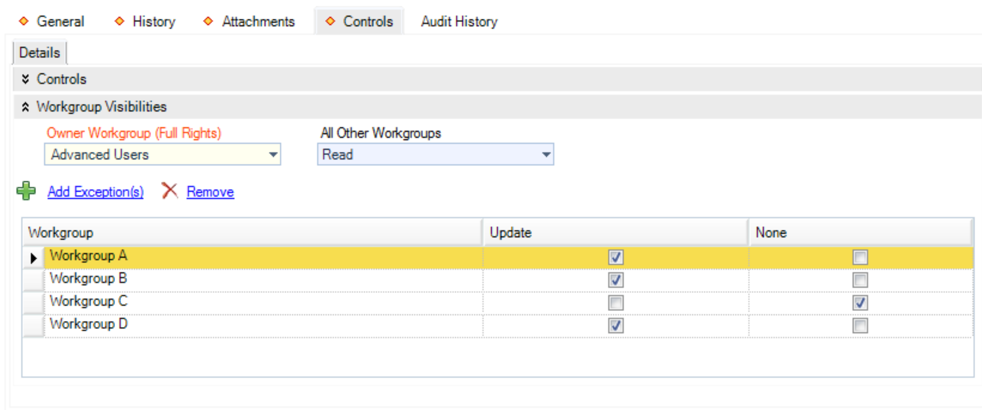
3. To set customized access for a workgroup that does not conform to the other control settings specified, click **Add Exception(s)**. A pop-up window will open.

   a. Select the workgroup and then select the workgroup's visibility for this record (Read, Update, or None). Continue to customize workgroup visibility for as many workgroups as you like.

   Note: Workgroup visibility exceptions override the access settings assigned under All Other Workgroups.



   b. Click **OK**. The selected workgroups and their corresponding modified access settings will be transferred to the grid in the Viewing pane of the main window.



Track Changes Made to an Item Record

Open the Audit History tab and complete the operation, as described in the "Track Changes Made to a Record" section in the "Incidents" chapter.

Persons

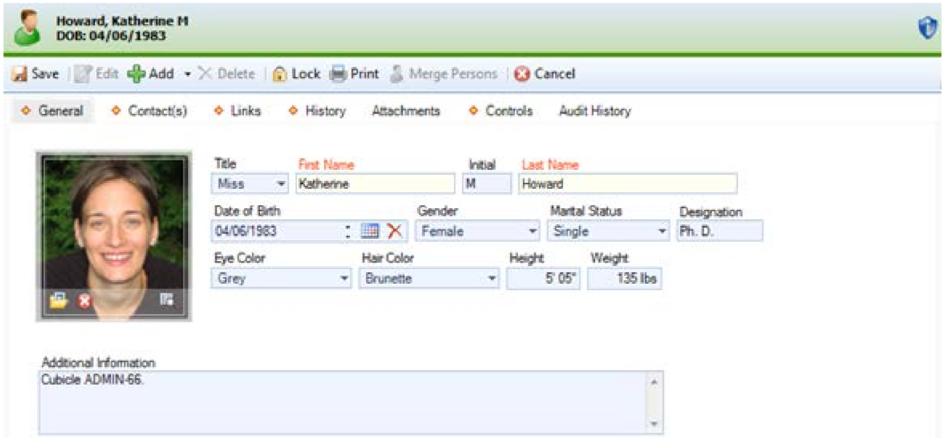
Create a New Person Record

Note General Details of the Person

Perspective provides four ways to create a new Person record: with the help of the standard Add function, by importing a Person record through your Microsoft Outlook Contacts, Microsoft Active Directory®, or from the Gateway.

To create a Person record using the standard Add function, follow the steps described below:

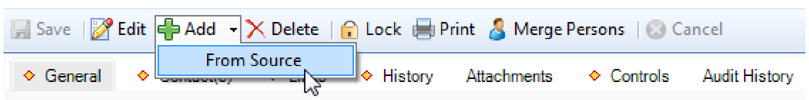
1. Click the **Add** button on the Viewing pane toolbar.
2. Enter the person's **Title** (e.g., Mr. or Mrs.) and **Designation** (e.g., B.Sc. or Chartered Accountant).
3. Type their **First Name**, **Last Name**, and middle **Initial**.
4. Specify their **Date of Birth**, **Gender**, and **Marital Status**.
5. Identify the person's physical characteristics, including **Eye Color**, **Hair Color**, **Height**, and **Weight**.
6. Add any other relevant personal information or notes in the **Additional Information** box.
7. To add a photo of the person to the record, click the **Add** icon in the image box.
8. Locate the image file in the browser window and click **Open**.



To add a person imported through your Microsoft Outlook Contacts or Microsoft Active Directory:

1. Click the down arrow to the right of the **Add** icon .

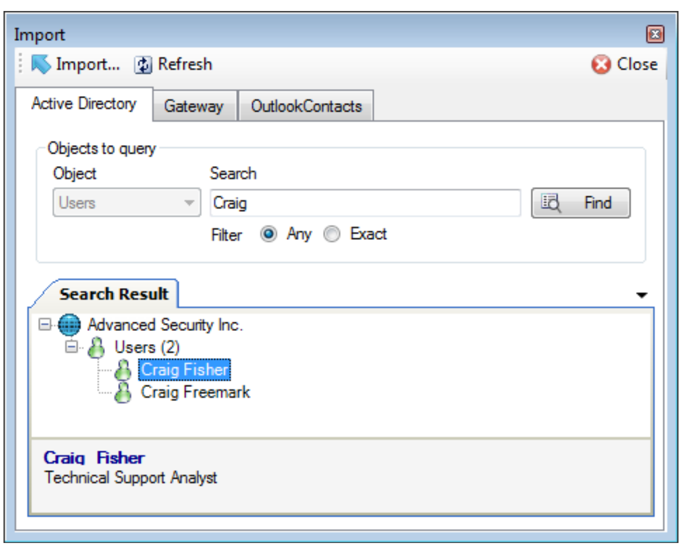
2. Click **From Source**.



3. In the pop-up window, select the tab that corresponds to your source (i.e., Active Directory or Outlook Contacts).

4. Find and select the correct person from the source list.

5. Click **Import**. The pop-up window will close and some of the Person form's fields will automatically populate with the selected person's information.



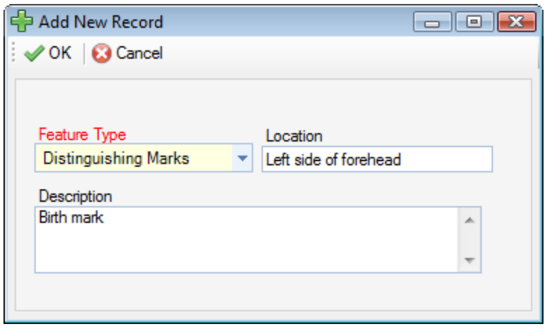
To import person's settings from the Gateway, perform the steps described in the "Import Record's Settings From the Gateway" section in the "Items" chapter.

Identify the Person's Unique Features

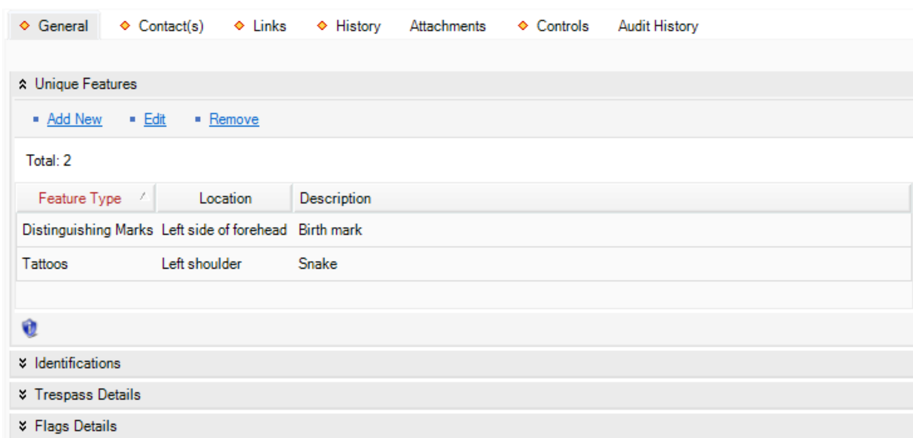
1. In the Unique Features section, click **Add New**. A pop-up window will open.

2. Select the appropriate descriptor of the person's unique feature from the **Feature Type** lookup list (e.g., Distinguishing Marks, Ethnic/Racial, Scars/Disfigurements, Tattoos).

3. Specify the **Location** of the unique feature on the person's body, and provide its **Description**.



4. Click **OK**.



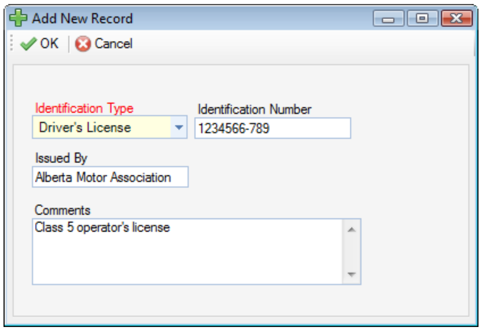
Record the Person's Pieces of ID

1. In the Identifications section, click **Add New**. A pop-up window will open.

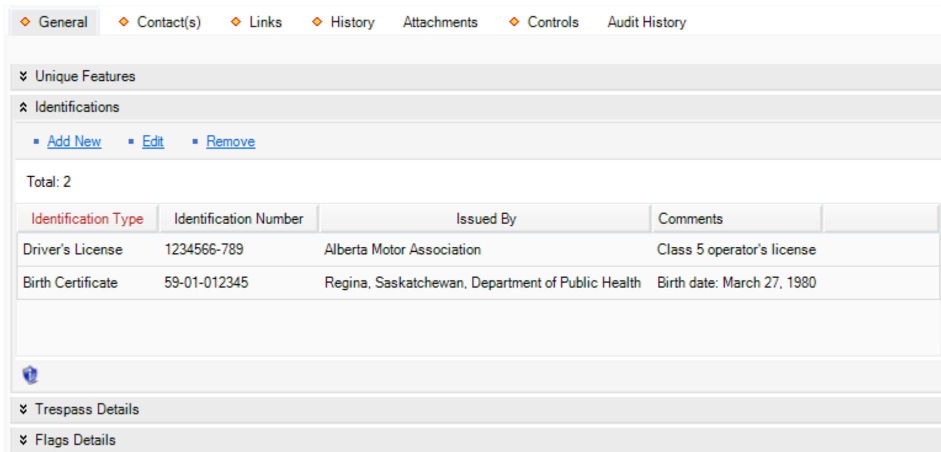
2. Specify the **Identification Type** (e.g., Driver's License or Birth Certificate) and the **Identification Number**.

3. Identify the organization/governing body that issued the identification in the **Issued By** field.

4. Add any other notes in the **Comments** text box.

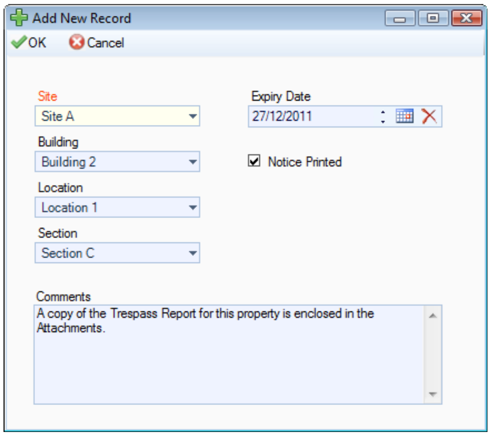


5. Click **OK**.

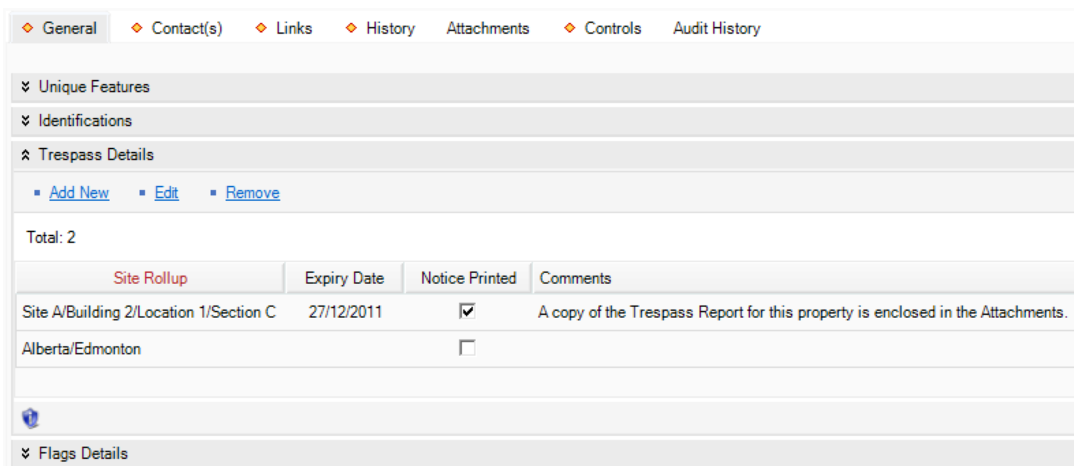


Document the Person's Trespass Details

1. In the Trespass Details section, click **Add New** A pop-up window will open.
2. Specify the **Site**, **Building**, **Location**, and **Section** where the trespass occurred.
3. If a trespassing notice was created, check the **Notice Printed** box.
4. If there is an expiry date for the trespassing notice, or for the offence, enter this in the **Expiry Date** field.
5. Include any additional information about the trespass under **Comments**.



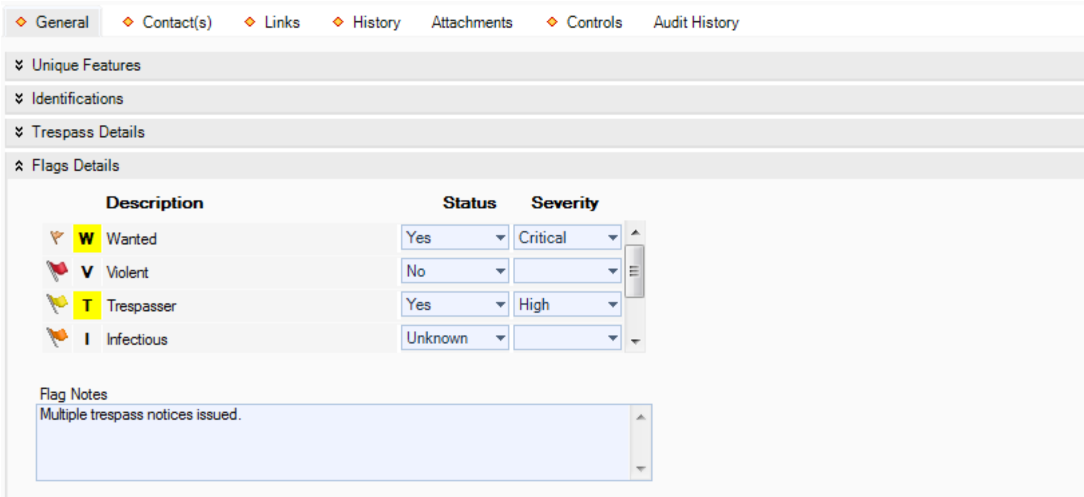
6. Click **OK**.



Flag the Person

1. In the Flag Details section, select each flag's **Status** (i.e., Yes, No, or Unknown), depending on whether or not the flag applies to the person. Also, select the **Severity** of the flag. Examples of flags include Violent, Trespasser, and Wanted.

2. Type any other comments under **Flag Notes**.



Record Contact Information

1. Select the **Contact(s)** tab.

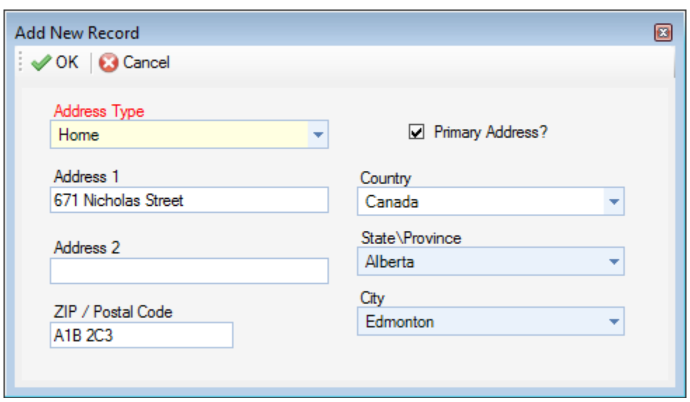
2. In the Address section, click **Add New**. A pop-up window will open.

   a. Specify the **Address Type** (e.g., Business, Head Office).

   b. Enter the person's full address in the fields provided.

   c. If the address entered is the person's main address, check the **Primary Address** box.

   d. Click **OK**.



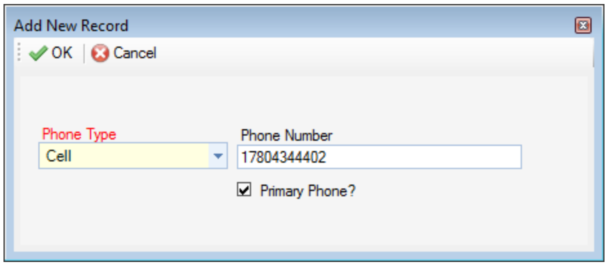
3. In the Phone Numbers section, click **Add New**. A pop-up window will open.

   a. Select the **Phone Type** (e.g., Main, Work).

   b. Enter the person's **Phone Number**. To avoid duplicate entries and to facilitate accurate searches, it is best to use a consistent format when entering phone numbers (e.g., hyphens in place of spaces, no parentheses).

c. If the phone number entered is the person's main number, check the **Primary Phone** box.

d. Click **OK.**



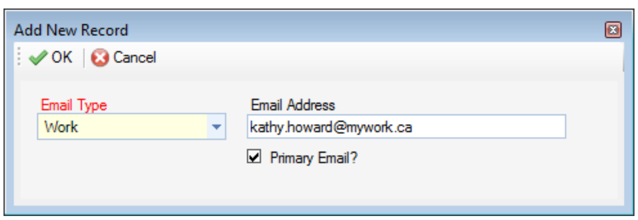
4. In the **Email Address** section, click **Add New**. A pop-up window will open.

a. Specify the **Email Type** (e.g., Home, Work, etc.).

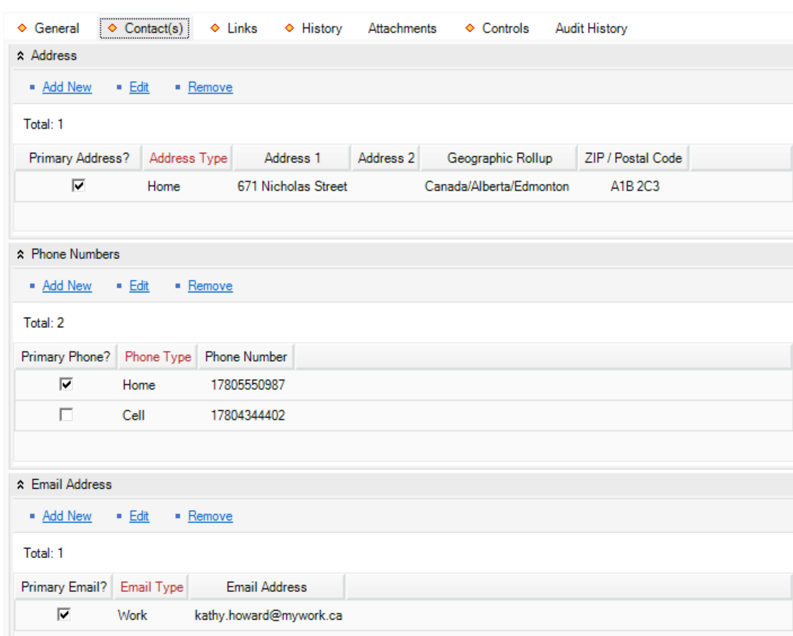
b. Enter the person's **Email Address**.

c. If the email address is the person's main email address, check the **Primary Email** box.

d. Click **OK**.



5. Add as many contact entries as you want.



Link a Record to a Person

1. Select the **Links** tab.

2. In the **Person Links** section, click **Add New.** A pop-up window will open.

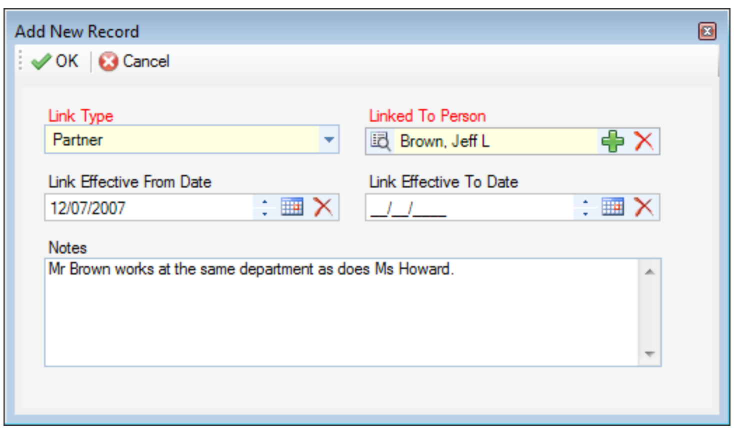
3. Indicate how the record is related to the person in the **Link Type** field (e.g., Partner, Employer, Driver).

4. Select the person you want to link to the record from the **(Linked To) Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

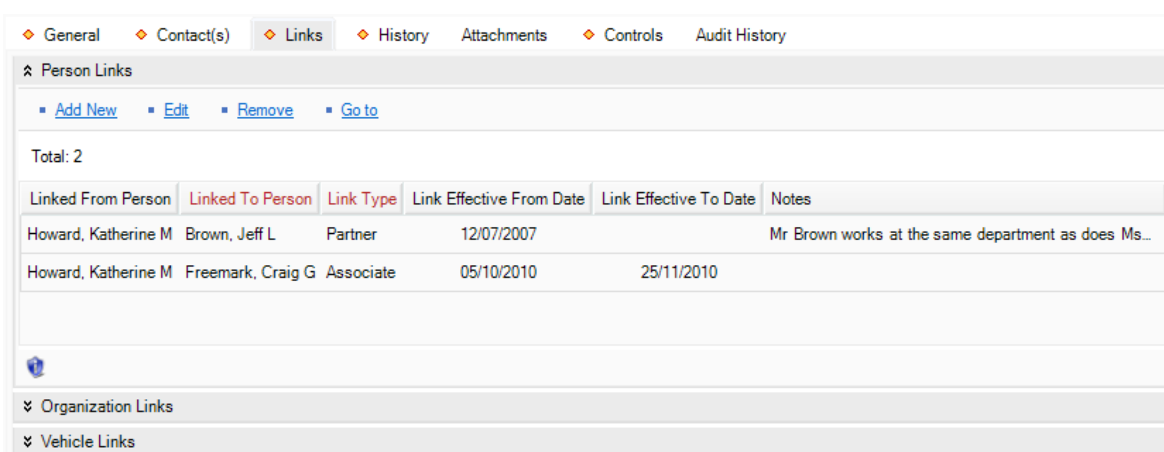
5. Enter the date that the person became associated with the record in the **Link Effective From Date** field. If this association no longer exists, indicate the date that it terminated in the **Link Effective To Date** field.

6. Type any additional information about the link in the **Notes** text box.

7. Click **OK**.



8. Once you click **Save** to save the changes made to the record, this link will automatically be cross-referenced in both the current record and linked Person record under the Links tab.



Link a Record to an Organization

1. Select the **Links** tab.

2. In the **Organization Links** section, click **Add New**. A pop-up window will open.

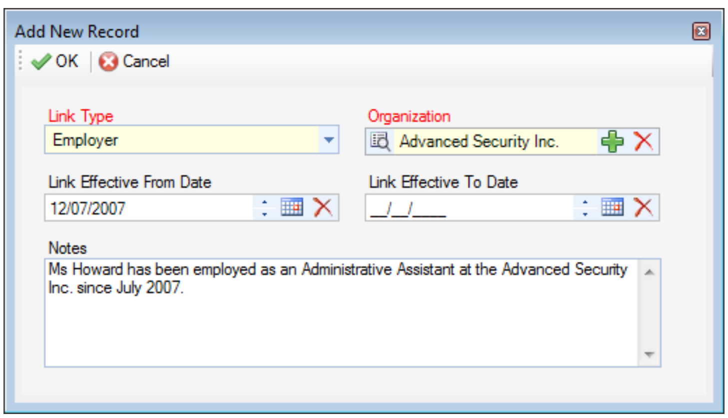
3. Specify how the record and the organization are related in the **Link Type** field (e.g., Employer, Parent Company, Owns/Owned By).

4. Select the organization you want to link to the record from the **Organization** pick list. If an Organization record does not already exist, use the Quick Add function to create one.

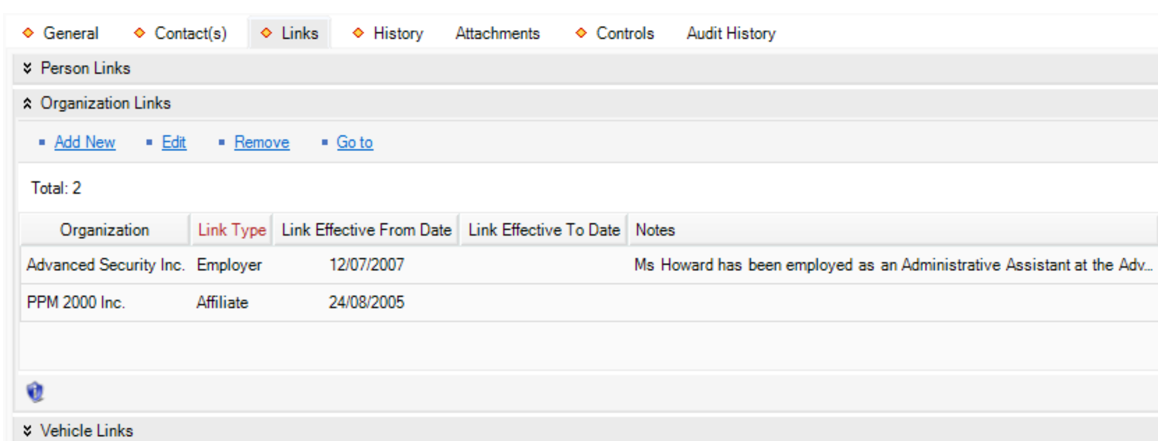
5. Enter the date that the record and the organization became associated with each other in the **Link Effective From Date** field. If this association no longer exists, indicate the date that it terminated in the **Link Effective To Date** field.

6. Type any additional information about the link in the **Notes** text box.

7. Click **OK**.



8. Once you click **Save** to save the changes made to the record, this link will automatically be cross-referenced in both the current record and the linked Organization record under the Links tab.



Link a Record to a Vehicle

1. Select the **Links** tab.

2. In the **Vehicle Links** section, click **Add New**. A pop-up window will open.

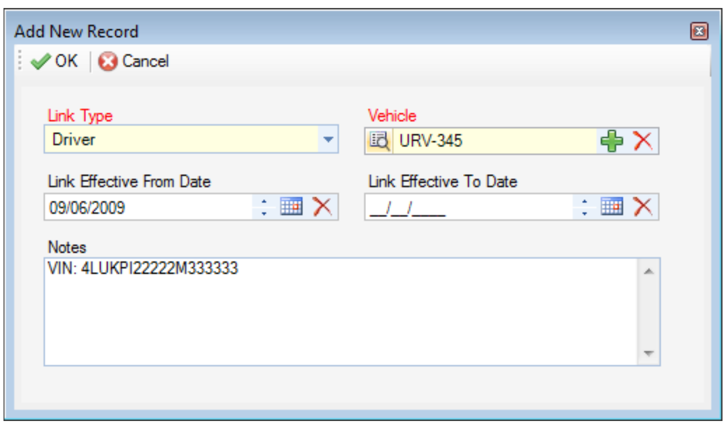
3. Specify how the record and the vehicle are related in the **Link Type** field (e.g., Registered Owner, Owns/Owned By, Same Fleet).

4. Select the vehicle you want to link to the record from the **Vehicle** pick list. If a Vehicle record does not already exist, use the Quick Add function to create one.

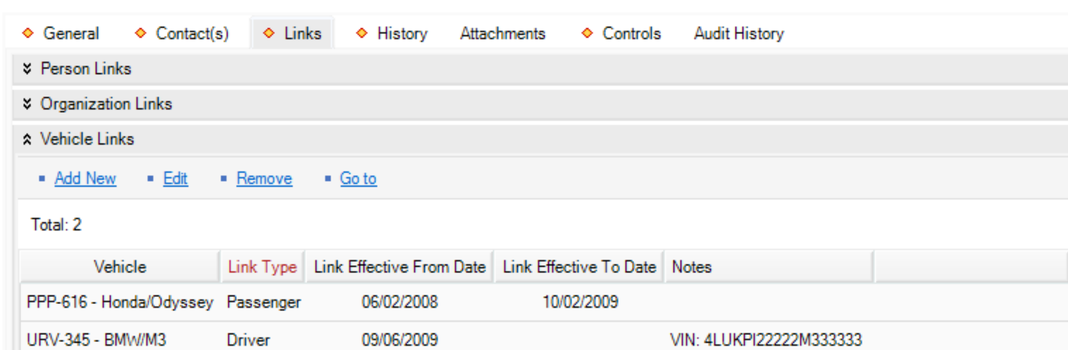
5. Enter the date that the record and the vehicle became associated with each other in the **Link Effective From Date** field. If this association no longer exists, indicate the date that it terminated in the **Link Effective To Date** field.

6. Type any additional information about the link in the **Notes** text box.

7. Click **OK**.



8. Once you click **Save** to save the changes made to the record, this link will automatically be cross-referenced in both the current record and linked Vehicle record under the Links tab.



View Person's Incident Involvements

Access the **History** tab and complete the operation, as described in the "Items" section, the "View Record's Incident Involvements" chapter.

The Persons Data Form has an additional sub-tab; Detailed Person History. This sub-tab shows a detailed history view of every time the person in the record you are looking at was linked or referenced in Perspective.

Attach a File to a Person Record

Open the **Attachments** tab and complete the operation, as described in the "Incidents" section, the "Attach a File to a Record" chapter.

Control a Person Record's Processing Options

Set the Security Controls and Status of the Person Record

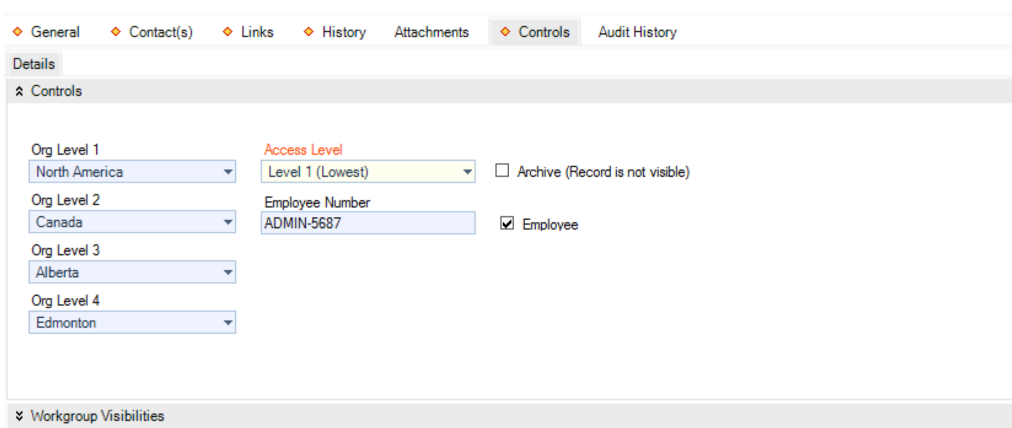
1. Select the **Controls** tab; the **Details** sub-tab will open by default.

2. In the **Controls** section, fill out the **Org Level** fields to set the record visibility settings for the various hierarchically organized groups within your organization. Only users with organizational rollups corresponding to or higher than the organizational rollup you select for the record will have access to it.

3. In the **Access Level** field, set the security level from 1 to 5. Each security level corresponds to a specific security description, such as "Classified". Only users with the same security Access Level as the one you select (or higher) will be able to view the record.

4. If you want to archive the record making it unavailable for users to access, check the **Archive (Record is not visible)** box.

5. Check the **Employee** box, if the person is employed by your organization, and then enter the person's **Employee Number**.



Define Which Workgroups Can Access the Person Record

In the **Workgroup Visibilities** section, define access options for the record, as described in the "Incidents" section, the "Define which workgroups can access the record" chapter.

Track Changes Made to a Person Record

Open the **Audit History** tab and complete the operation, as described in the "Incidents" section, the "Track changes made to a record" chapter.

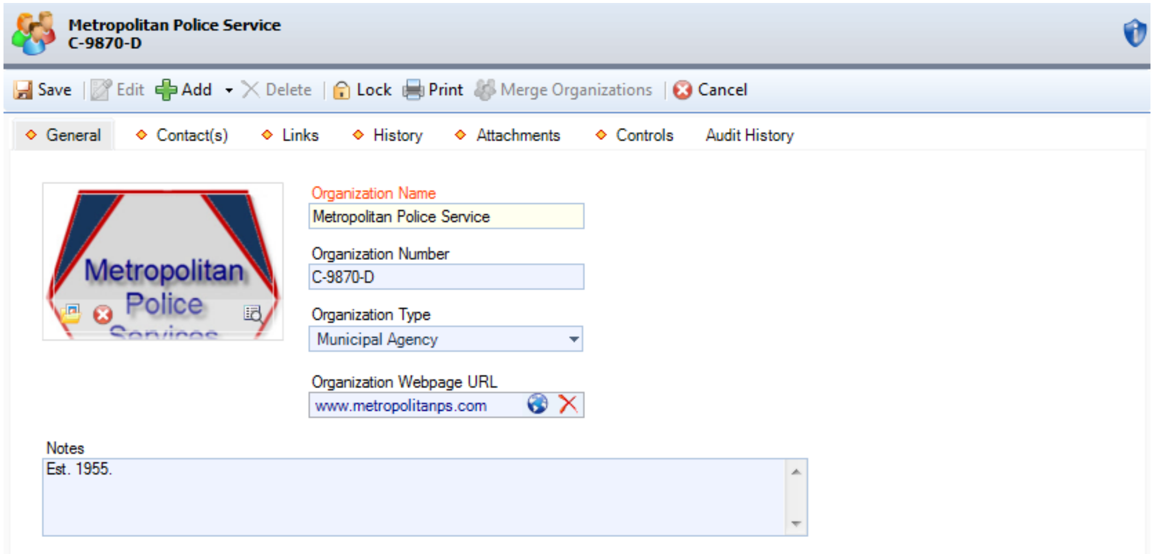
Organizations

Create a New Organization Record

Perspective provides two ways to create a new Organization record: with the help of the standard Add function, and by importing an Organization record from the Gateway.

To create an Organization record using the standard Add function:

1. Click the **Add** button on the Viewing pane toolbar.
2. Enter the **Organization Name**.
3. If known, input the organization's file, ID, or other tracking number in the **Organization Number** field.
4. Choose the appropriate description from the **Organization Type** lookup list.
5. If the organization has a Web site, specify the Web address under **Organization Webpage URL**. Clicking the adjacent Microsoft Internet Explorer® icon will open the Web page in a separate browser window.
6. Enter any additional information about the organization in the **Notes** box.
7. To add an **image** to the Organization record, click the **Add** icon in the image box. Locate the image file in the browser window and click **Open**.



To import organization's settings from the Gateway, perform the steps described in the "Items" section, the "Import Record's Settings from the Gateway" chapter.

Record an Organization's Contact Information

Open the **Contact(s)** tab and complete the operation, as described in the "Persons" section, the "Record Contact Information" chapter.

Link an Organization to a Person

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a Record to a Person" chapter.

Link an Organization to Another Organization

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a Record to an Organization" chapter.

Link an Organization to a Vehicle

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a record to a vehicle" chapter.

View Organization's Incident Involvements

Access the **History** tab and complete the operation, as described in the "Items" section, the "View Record's Incident Involvements" chapter.

Attach a File to an Organization Record

Open the **Attachments** tab and complete the operation, as described in the "Incidents" section, the "Attach a File to a Record" chapter.

Control an Organization Record's Processing Options

For control options available for Organization records, refer to the "Items" section, the "Control Record's Processing Options" chapter.

Track Changes Made to an Organization Record

Open the **Audit History** tab and complete the operation, as described in the "Incidents" section, the "Track Changes Made to a Record" chapter.

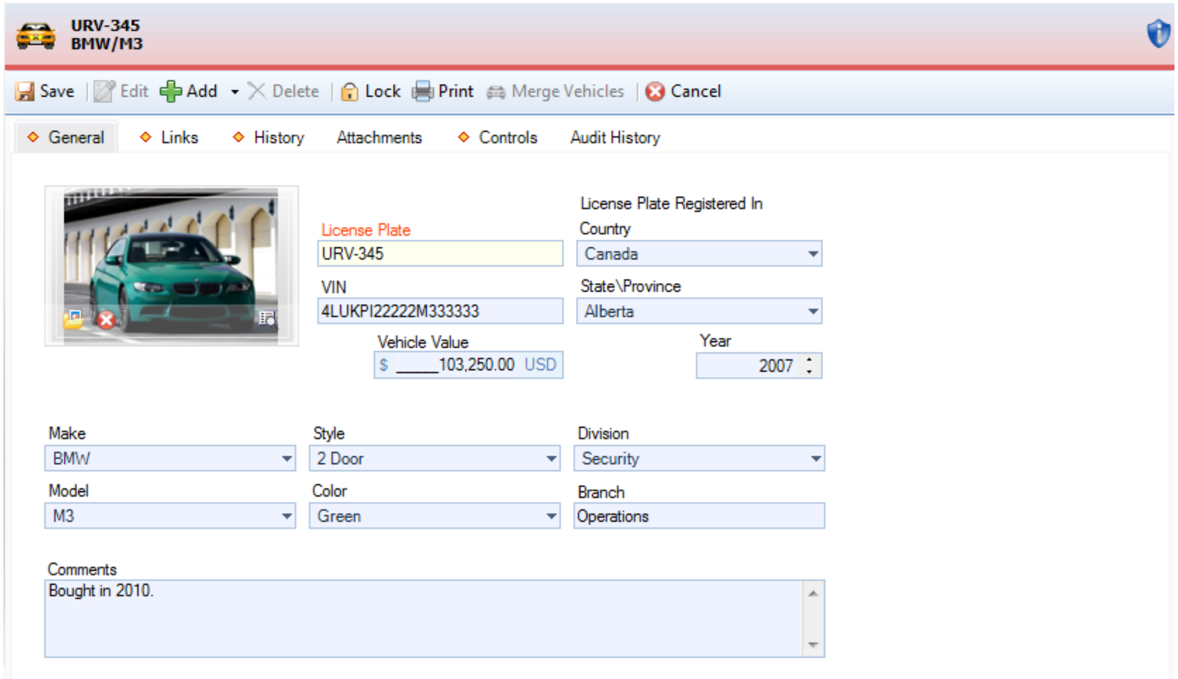
Vehicles

Create a New Vehicle Record

Perspective provides two ways to create a new Vehicle record: with the help of the standard Add function, and by importing a Vehicle record from the Gateway.

To create a Vehicle record using the standard Add function, do the following steps:

1. Click the **Add** button on the Viewing pane toolbar.
2. Enter the **License Plate** number. To avoid duplicate entries and to facilitate accurate searches, it is best to use a consistent format for entering license plate numbers (e.g., no spaces or special characters).
3. If known, indicate where the vehicle's license plate was registered in the **Country** and **State/Province** fields.
4. If known, enter the vehicle's **VIN**, **Vehicle Value**, and **Year**.
5. Specify the vehicle's **Make**, **Model**, **Style**, and **Color**.
6. If the vehicle is a company vehicle, specify the **Division** and **Branch** it belongs to.
7. Add any additional information in the **Comments** text box.
8. To add a **photo** of the vehicle to the record, click the **Add** icon in the image box. Locate the image file in the browser window and click **Open**.



To add a vehicle imported through the Gateway, perform the steps described in the "Items" section, the "Import Record's Settings From the Gateway" chapter.

Link a Vehicle to a Person

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a Record to a Person" chapter.

Link a Vehicle to an Organization

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a Record to an Organization" chapter.

Link a Vehicle to Another Vehicle

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a Record to a Vehicle" chapter.

View Vehicle's Incident Involvements

Access the **History** tab and complete the operation, as described in the "Items" section, the "View Record's Incident Involvements" chapter.

Attach a File to a Vehicle Record

Open the **Attachments** tab and complete the operation, as described in the "Incidents" section, the "Attach a File to a Record" chapter.

Control a Vehicle Record's Processing Options

Set the Security Controls and Status of the Vehicle Record

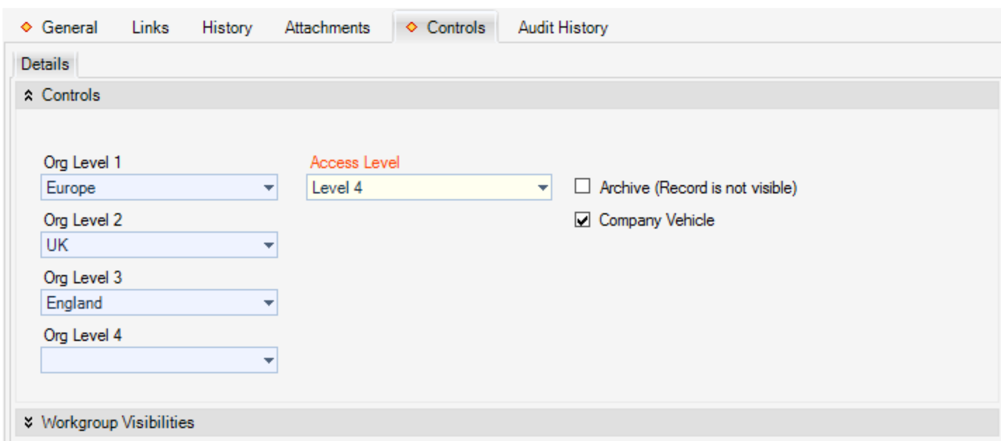
1. Select the **Controls** tab; the **Details** sub-tab will open by default.

2. In the **Controls** section, fill out the **Org Level** fields to set the record visibility settings for the various hierarchically organized groups within your organization. Only users with organizational rollups corresponding to or higher than the organizational rollup you select for the record will have access to it.

3. In the **Access Level** field, set the security level from 1 to 5. Each security level corresponds to a specific security description, such as "Classified". Only users with the same security Access Level as the one you select (or higher) will be able to view the record.

4. If you want to archive the record making it unavailable for users to access, check the **Archive (Record is not visible)** box.

5. Check the **Company Vehicle** box if the vehicle belongs to your organization.



Define Which Workgroups Can Access the Vehicle Record

In the **Workgroup Visibilities** section, define access options for the record, as described in the "Incidents" section, the "Define Which Workgroups Can Access the Record" chapter.

Track Changes Made to a Vehicle Record

Open the **Audit History** tab and complete the operation, as described in the "Incidents" section, the "Track Changes Made to a Record" chapter.

Merge Records

The **Merge** function is only available on four Perspective's data forms, i.e., Items, Persons, Organizations,m and Vehicles. It is a method of merging partially duplicate records that correspond to a single physical referent (e.g., an item, a person, an organization, or a vehicle). The function is represented by the **Merge** button on the Viewing pane toolbar.

Note: The Merge function is irreversible and cannot be undone. Be absolutely certain you want to merge records before proceeding!

1. Open a record that will function as the **primary record** of your merging process, typically, the one with the most accurate information and the most details.

2. Click the **Merge** button on the Viewing pane. A Quick Merge form will open with the general details of the selected record on the left, and an equivalent blank record form on the right.

3. Select the appropriate **Secondary Record** with which you would like to merge the primary record from the pick list at the top of the blank form.

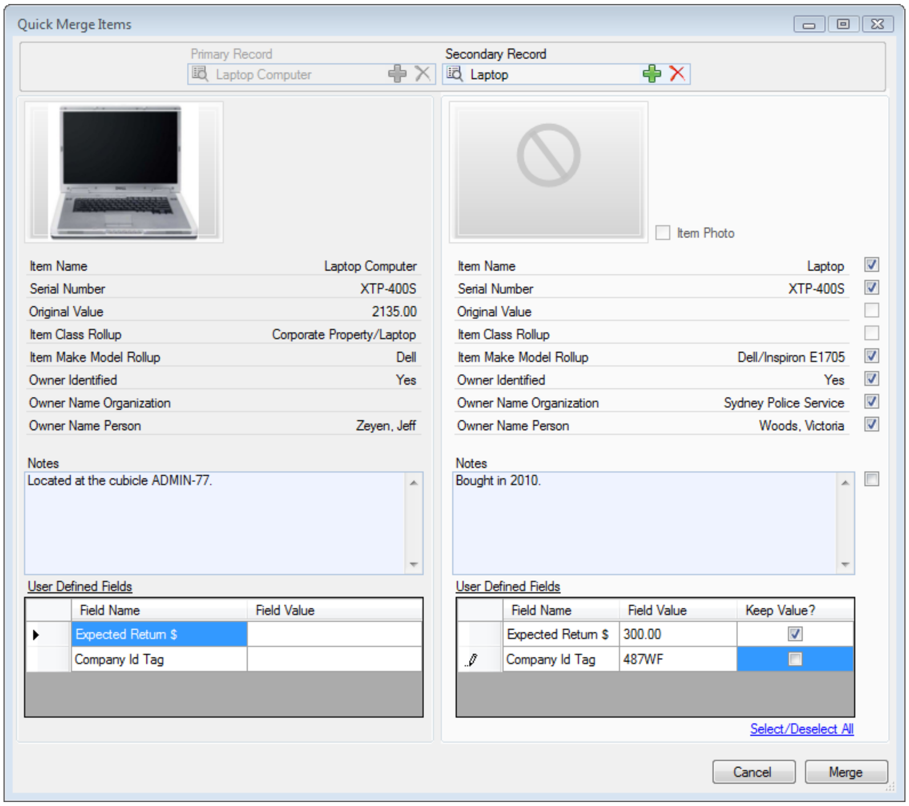
   The blank form will populate with the data contained in the General tab of the selected record. The checkmarks will mark the pieces of information that can be merged between the records. For the fields, where the secondary record contains no information, the checkmarks will be inactive. This means that the corresponding values in the primary record will remain unchanged.

4. Select (or deselect) the fields in the second form you want to save (or leave out) using the appropriate checkmarks.

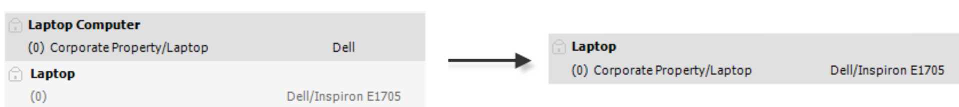
   Click **Select/Deselect All** to toggle the selection of all the available data fields for merging.

   Note: Deselecting all fields in the secondary record form does not mean that the merging of the records will not occur. The Merge function performs both merging of the general data that is displayed in the Quick Merge form, as well as the rest of the data that is contained in the merging records and hidden from the Quick Merge forms (e.g., contacts, attachments, links, history).

5. Click **Merge**.



6. Once the merging of the selected records is complete, a confirmation dialog will be displayed. Click **OK**. The secondary record will disappear from the Listing pane, while the resulting merged record will display in the Viewing pane in editing mode.



The result of the merge will be a single record that contains the following components:

a. The values from the primary record data (including the image of the record's reference item, person, organization, or vehicle, and the user defined fields) that were not selected for merging on the secondary record form;

b. The values of the secondary record data (including the image of the record's reference item, person, organization, or vehicle, and the user defined fields) that were selected for merging on the secondary record form;

c. The *hidden* data entries pulled from *both* the primary and the secondary record that correspond to all or some of the following data types:

The records' **Contacts**: Addresses, Phone Numbers, Email Addresses;

The records' **Links**: Person, Organization, and Vehicle Links;

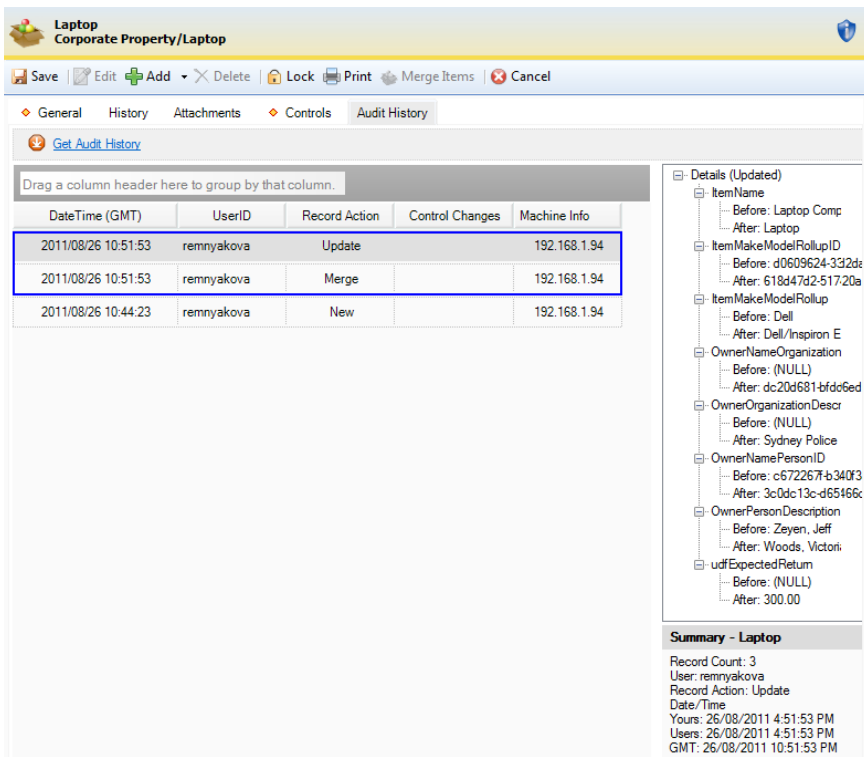
The records' **Histories** of all incident involvements;

The records' **Attachments**;

If you were merging two Person records, the data will also be pulled from the **Unique Features**, **Identifications**, and **Trespass Details** sections from both records.

The data that never gets merged (i.e., that is left unchanged, with the primary record's values) includes the settings of the **Controls** tab. If you were merging two Person records, the **Flags Details** contained in the primary record will be saved as the default settings for the resulting merged record too.

Under the **Audit History** tab, the occurred merge is documented with the help of two Record Action entries: the Merge entry stands for the occurred merging of the records' general and hidden data, whereas the Update entry documents the merging of the specific fields in the primary and the secondary record forms.



7. Scan the final record for possible repetitions of data that were merged and resulted in unintentional duplication of the same information.

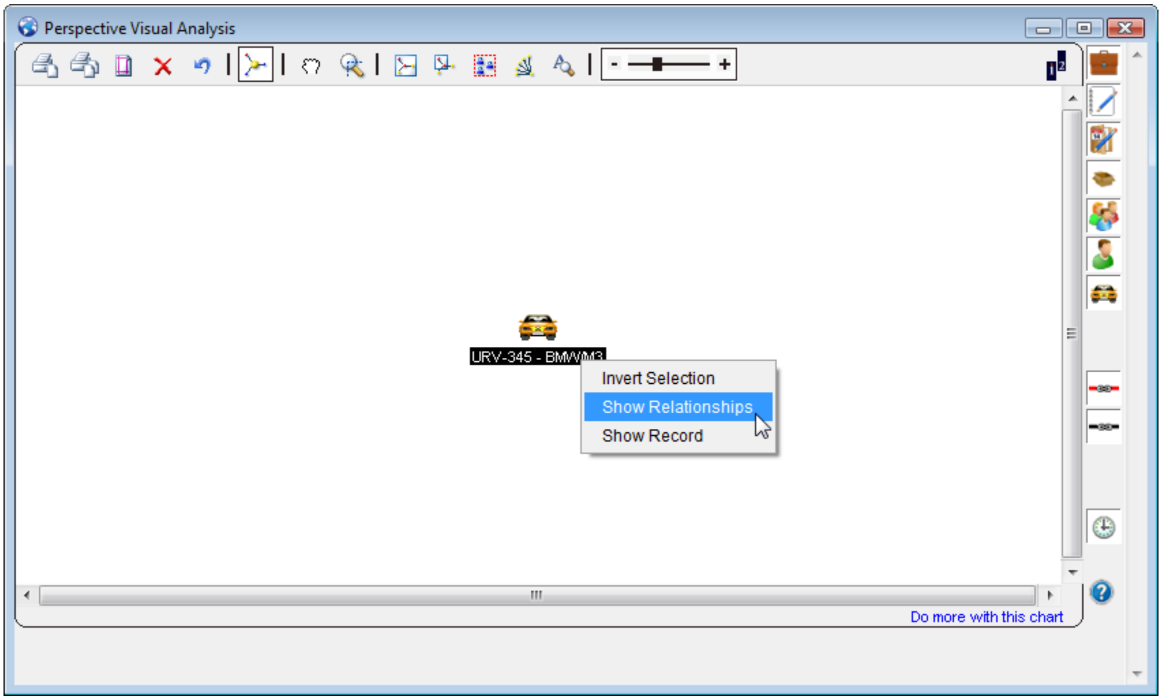
8. Click **Save** to save the changes made.

Construct a Visual Link Chart for a Record

Visual Analysis allows you to create a visual link chart representing the data relationships between the selected types of records.

To activate this function, select the main record of focus (e.g., a Person record) in the Viewing pane and click the **Visual Analysis** icon on the Ribbon. A separate Perspective Visual Analysis window will open with the selected record displayed as an icon in the centre.

See the *Perspective Visual Analysis* section for further information on building a link chart.



Analyze and Report

The Analyze and Report module includes three components: Analysis Expert, Reports, and Custom Reports.

Analysis Expert: Analysis Expert is an internal search engine that scans the data in all Activity, Incident, Case (Perspective ICM and EIM only), Item, Person, Organization, and Vehicle records, and returns results that meet the defined search requirements.

Reports: Perspective contains a number of preset reports that you may use to generate statistics and analyze trends in your data.

Custom Reports: You have the ability to take queries that you've built in Analysis Expert and customize them into custom reports.

Analysis Expert

Analysis Expert is an internal search engine that scans the data in all Activity, Incident, Case (Perspective ICM and EIM only), Item, Person, Organization, and Vehicle records, and returns results that meet the defined search requirements. Search results reflect assigned user access rights and privileges. Use Analysis Expert to create a query, and then turn your query's results into a spreadsheet, a chart, a printed grid, or a report.

User Interface

The interface of the Analysis Expert component transforms according to the stages of query building, by which it evolves into two separate screens – the initial **query designer** window and the subsequent **query results** window.

The query designer window of Analysis Expert enables you to set specific query criteria, grouping and search options, and is aimed at producing optimal query results. It is divided into the following six sections:

1. **Ribbon:** Contains an additional set of buttons that perform saving, adding, cloning, deletion, sharing, and execution of queries.

   Note: Some functions of the Ribbon buttons are accessible directly from the right-click menu of a record entry or a query. Specifically, you may add, clone, share, remove, rename, execute it, and edit a query by right-clicking the corresponding query entry and selecting the relevant option in the menu.

2. **Listing pane:** Arranges queries that you create according to their access options (i.e., Shared Queries or Private Queries) and query category. By default, all new queries are Private Queries available only to the user who created them. In order to make a saved query available to users across your organization, you must share it. Refer to the "Share a Query" chapter for more information on how to do this.

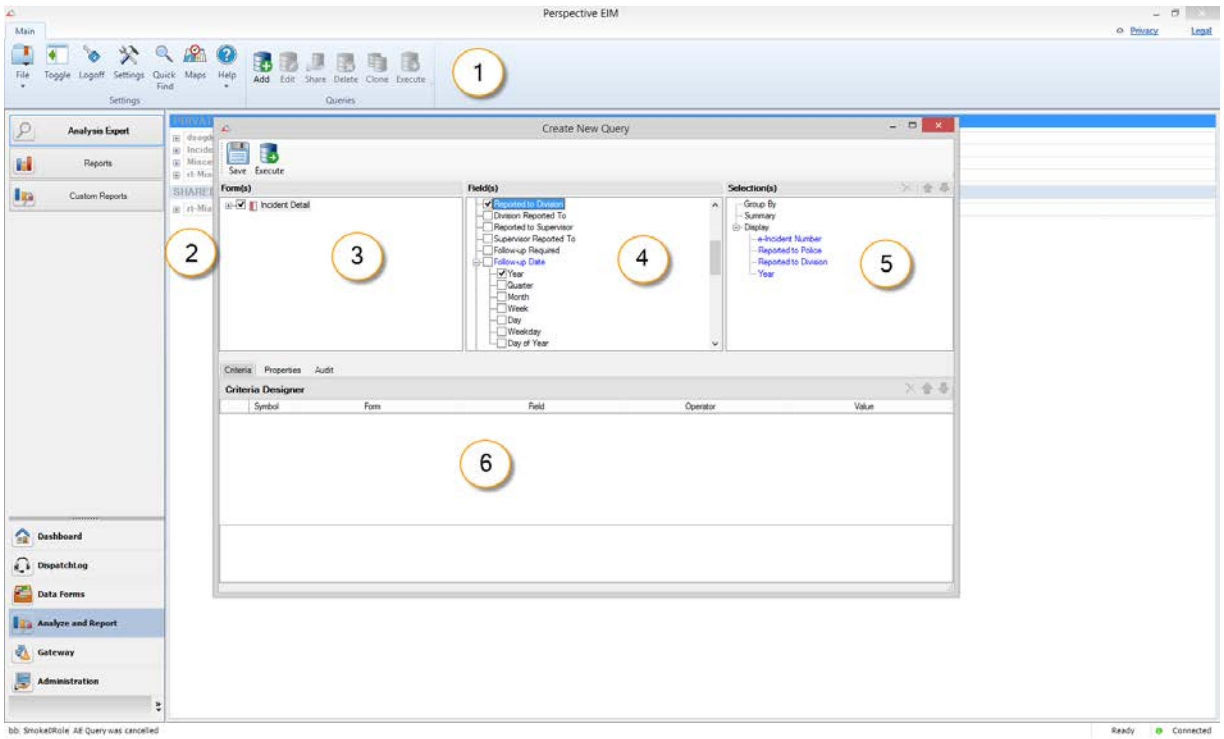
3. **Form(s) pane:** Depending on the query selected in the Viewing pane, displays a list of forms available for querying. Once you select a form in the Form(s) pane, the corresponding fields will be checked in the Field(s) pane and recorded in the Selection(s) pane.

4. **Field(s) pane:** Depending on the form selected in the Form(s) pane, displays specific fields that can be selected for display in the query results. The selected fields will automatically populate the Selection(s) pane under Display. The Field(s) pane also enables sorting and grouping of the query results by specific fields that are imported as query criteria into the Selection(s) pane and Criteria Designer.

5. **Selection(s) pane:** Displays the selected query criteria, as well as grouping and display options for the query results.

6. **Criteria Designer:** Contains three tabs (Criteria, Properties, and Audit) that control the process of query building.

    - The Criteria tab displays the fields that were selected as search criteria from the Field(s) pane and enables settings of their search values.
    - The Properties tab displays the text expression of the criteria selected under the Criteria tab.
    - The Audit tab tracks the history of the runs of the query.



Navigating Data Forms Overview

To complete a full cycle of creating a query in Analysis Expert and then using the resulting data for further analysis, follow the general navigation principles described below:

1. In the initial query designer window, create a customized query that exactly corresponds to your specific criteria. From this window, you may also edit, clone, share, delete, save, and/or execute your query.

2. Once the query is “executed”, a new window will pop up with the results of the query displayed in the form of a grid. At this point, you may start working with your query results, which includes searching, grouping, exporting, charting, and printing them, as well as

performing an internal analysis (i.e., building a visual link chart or performing calculations) of the individual records that compose the query results.

3. If you chose to chart your results, a new charting window will appear with a set of standard charting tools and an option to elaborate the design of the chart even further with the Chart Wizard tool. When your chart is complete, you may choose to print it or copy it to clipboard.

The following chapters will address the options available for each of these steps in greater detail.

About Operators

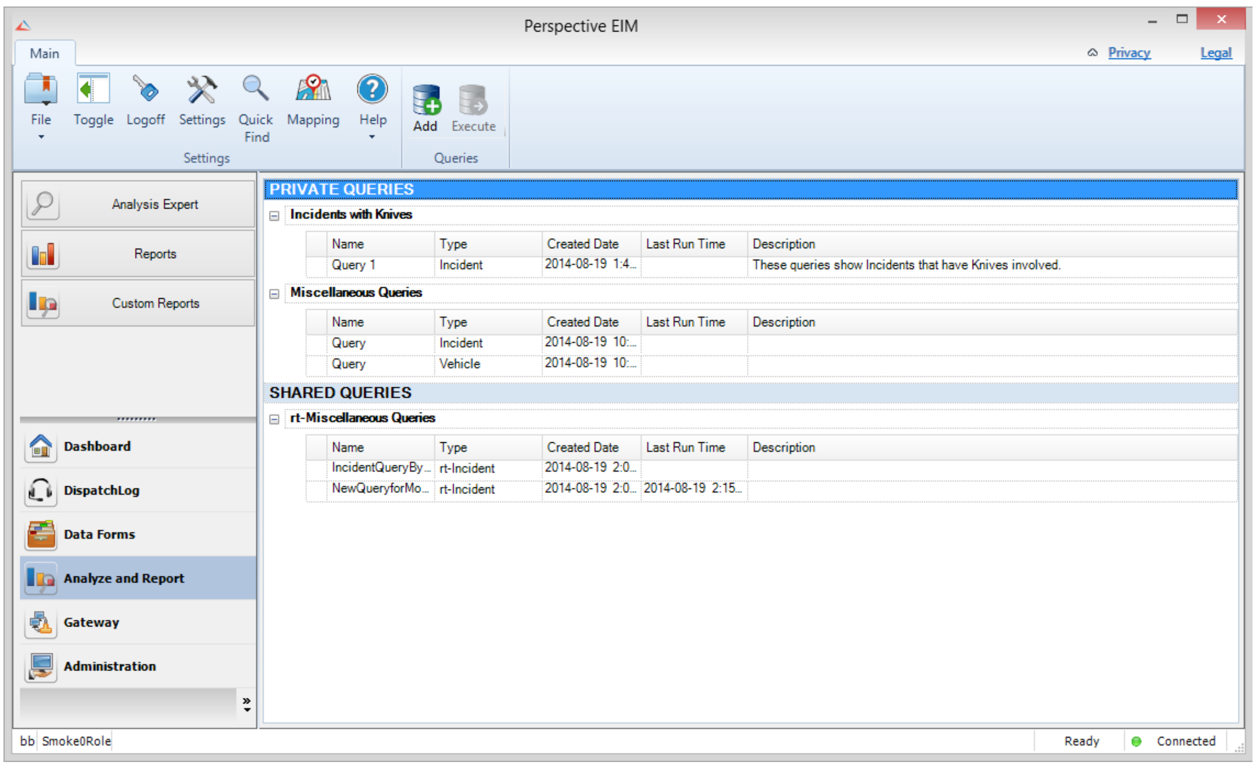
Analysis Expert uses operators to determine what data to display. The following table explains what each operator means.

Symbol	Read as	Explanation of Result
=	"equals"	Will display records where the field's value is equal to the value specified. Note that only exact matches will be displayed.
>=	"is greater than or equal to"	Will display records where the field's value is greater than or equal to the value specified. This operator is only available for criteria with numerical values, such as dates, quantities, amounts of money, etc.
<=	"is less than or equal to"	Will display records where the field's value is less than or equal to the value specified. This operator is only available for criteria with numerical values.
>	"is greater than"	Will display records where the field's value is greater than the value specified. This operator is only available for criteria with numerical values.
<	"is less than"	Will display records where the field's value is less than the value specified. This operator is only available for criteria with numerical values.
<>	"is not equal to"	Will display records where the field's value is not equal to the value specified.
Like	"like"	Will display records where the value specified is contained somewhere in the selected field.
Starts with	"starts with"	Will display records where the field's value starts with the value specified.
Ends with	"ends with"	Will display records where the field's value ends with the value specified.

Between	"between"	Will display records where the field's value is between the dates specified.
Not Between	"not between"	Will display records where the field's value is not between the dates specified.
Today	"today"	Will display records where the field's value is today's date.
Yesterday	"yesterday"	Will display records where the field's value is yesterday's date.
This Week	"this week"	Will display records where the field's value contains records from this week.
This Month	"this month"	Will display records where the field's value contains records from this month.
This Year	"this year"	Will display records where the field's value contains records from this year.
Last # Days	"last # days"	Will display records where the field's value contains records from the last specified number of days. Will not display the day you are currently in.
Last # Weeks	"last # weeks"	Will display records where the field's value contains records from the last specified number of weeks. Will not display the week you are currently in (reads as Sunday-Saturday).
Last # Months	"last # months"	Will display records where the field's value contains records from the last specified number of months. Will not display the month you are currently in.
Last # Years	"last # years"	Will display records where the field's value contains records from the last specified number of years. Will not display the year you are currently in.
Is Empty	"is empty"	Will display records where the field's value is N/A. Using the operator "is empty" will lock (make uneditable) the Value field.

Create a Query Category

You can create query categories so that similar queries appear in a table together. For example, you may have a "Quarterly" category for all queries you run every quarter, or a "Thefts" category for any Activity, Incident, or Case query pertaining to thefts. Any queries that you do not put into a category will automatically be placed under the Miscellaneous Queries category. You can create query categories when you create or edit a query.



Query Design Process

Create a Query

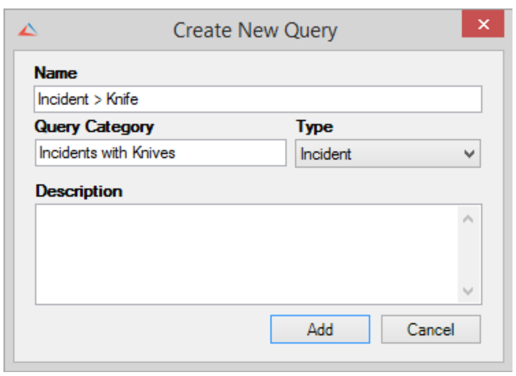
1. Make sure the query category you want your created query to appear under is highlighted (i.e., Private Queries, Shared Queries).

2. To start a new query, choose one of the following options:

- Click **Add** on the Ribbon.
- Right-click in the listing pane, and select **Add** from the drop-down menu that appears.

3. A Create New Query dialog box will open.
4. Enter a title for the query in the **Name** field.
    - By default, the system will name the new query, according to the template <New Query>.
5. Make sure the Query Category is correct. If you want to create a new Category, type it in this field.
6. From the **Type** lookup list, choose the record entity you would like Analysis Expert to search (e.g., Incident, Person, Case).
7. In the **Description** text box, identify the type of query and/or its purpose.

    Note: The Description field can be left blank. The Name and Query Category fields must be filled in.



8. Click **Add**.
9. The new query entry will be added to the relevant record entry node. The Form(s) pane will automatically populate with the names of the selected record entity's respective forms (e.g., Incident Details, Incident Flags, Incident Losses).

Specify Query Criteria

Before specifying criteria for your query, take some time to think about the design of your query by considering the following questions:

- Do you want to search the whole database or just a portion of data (e.g., incident data recorded within a particular time period, person data for employees only)?
- If you want to search a portion of data, what parameters do you want in your search?
- What type of data do you want to see in your query results (e.g., incident time, place, losses)?

- How do you want to present your data? Do you want to summarize your results or see lists of actual data values?

In the example below, we will be looking at a query design with the following specifications:

- ***Type of query:*** Incident query.
- ***Scope of data:*** Incidents that happened since 2007 and involved net losses (e.g., Net Loss of each incident is above 0.50 cents).
- ***Data of interest:*** Number of incidents, Year, Category, Site, Total Loss, and Net Loss.
- ***Data grouped by:*** Year, Category, and Site.

OPTION 1a: ***If you want to search the whole database, proceed to select the specific types of data that you want to see in your query results.***

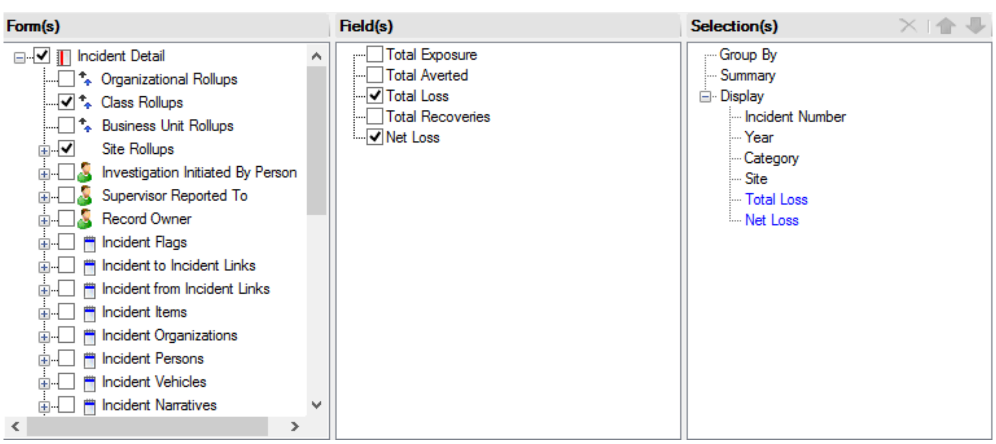
1. Expand the relevant form nodes in the Form(s) pane to see all constituent subforms.

2. To view fields available in a form in the Field(s) pane, click once on the name of the relevant form. To select all the fields in a particular form, check the form box.

3. In the Field(s) pane, check the boxes of the fields you want to see as headers in your query results and reports. The field names will automatically populate the Selection(s) pane under Display in the order they were selected.

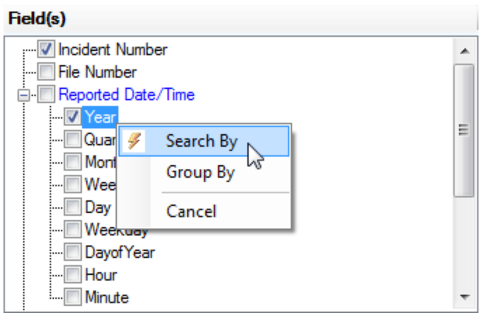
    - To reorder the fields appearing in your query results, select the field in the Selection(s) pane and then use the up and down arrows in the top right corner of the pane to rearrange the field's position in the Display list.

    - To delete a field from display in your query results, select the field name in the Selection(s) pane and click the **Remove** icon in the top right corner of the pane, or uncheck the field's checkbox in the Field(s) pane.

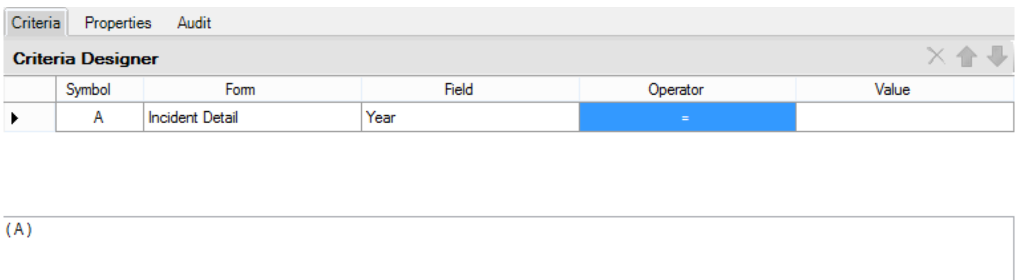


OPTION 1b: ***If you want to search a portion of data, set the parameters of your data sample.***

1. In the Field(s) pane, right-click a field that corresponds to the parameter of interest, and select the **Search By** option from the menu. If you do not want a parameter field to be displayed in the query results, unselect the checkbox beside the field's name in the Field(s) pane.

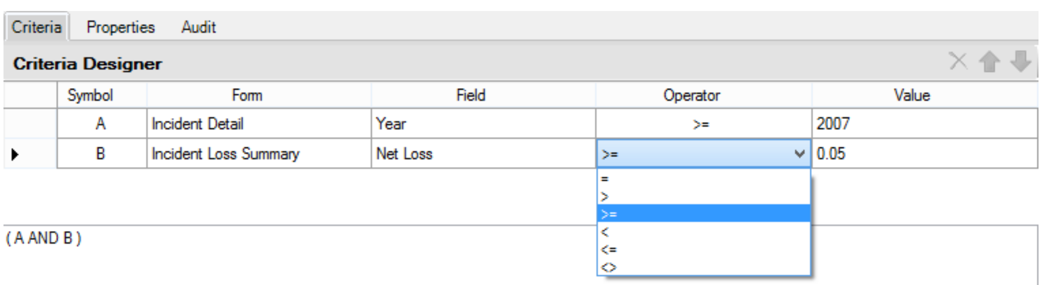


The selected field will now appear in the **Criteria Designer** pane below.



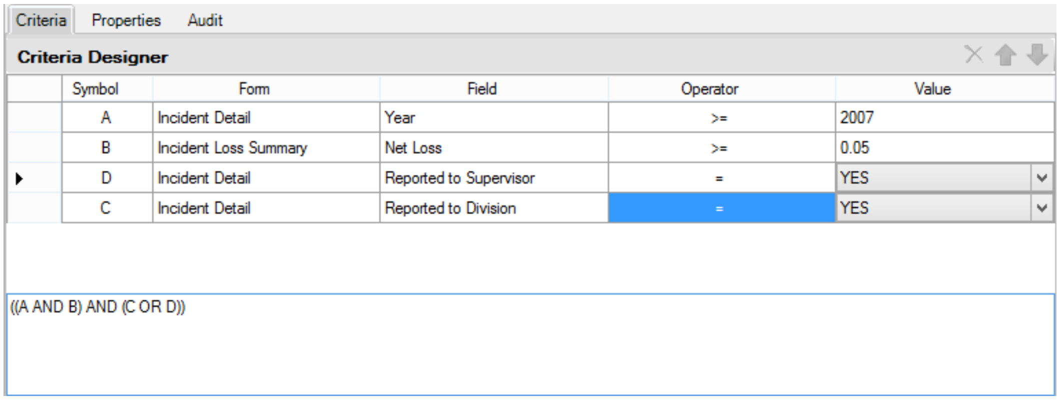
2. To **specify a comparison value** for the selected parameter, select the relevant **Operator** from the lookup list (e.g., =, <>, >, Like, Starts With, Ends With). Depending on the type of parameter, you will have an option of either entering the comparison value in the **Value** field, or selecting it from the lookup list.

3. Add as many parameters for your data sample as needed.

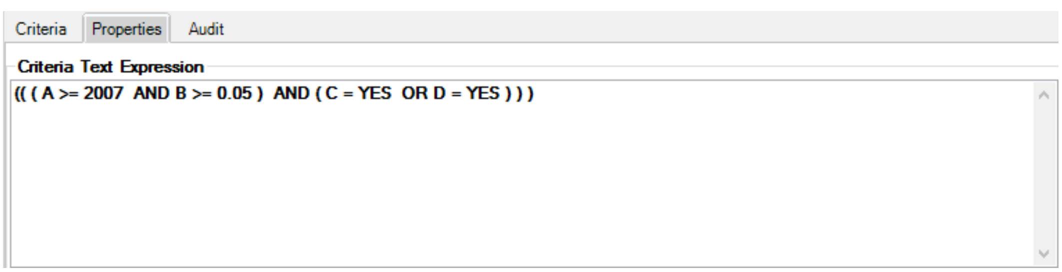


4. As you continue to specify the parameters, the system will edit the corresponding Boolean logic statement at the bottom of the Criteria Designer pane. By default, Perspective searches for data that meets both criterion A AND criterion B, and so on. If you want to only generate results that meet either criterion A OR criterion B, or some variation thereof, you must modify the statement to reflect this. It is best to modify the statement after you have entered all your data parameters first.

Note: Deleting a parameter symbol (e.g., A, B, C) from the statement will not remove the corresponding parameter from the list. However, if a parameter is deleted from the statement, it will not appear in the executed query results. Ultimately, the Boolean logic statement contains the defining formula for your data sample, while the list of parameters provides the parameters you may search by, and serves as a reference point for the statement.



- To reorder the parameters in the Criteria Designer list, select the corresponding row and use the up and down arrows in the top right corner of the pane to rearrange the parameter's position in the list.
- To delete a parameter from the list, select the corresponding row and click the **Remove** icon  in the top right corner of the pane, or uncheck the field's checkbox in the Field(s) pane.
- To view the text expression of the Boolean logic statement for your data, select the **Properties** tab of the Criteria Designer pane.

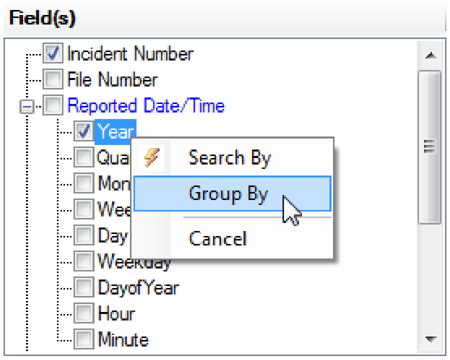


OPTION 2a: ***If you want to see lists of raw data values in your query results, proceed to execute your query.***

OPTION 2b: ***If you want to see your query results summarized, select the fields by which you would like to group your results.***

1. To group your query results by a particular field, ensure the field's box in the Field(s) pane is checked. Then, right-click the field and select **Group By** from the menu.

   Note: Not all fields are available for group by. In order to group by a particular field, it must have only one reference value, i.e., its value cannot be cumulatively derived from several *fields. For example, an incident's Total Loss field cannot be grouped by, since it potentially draws data from multiple involved items and vehicles with recorded losses. In contrast, the Site field in an Incident record can refer to only one site value, which makes it a legitimate candidate for a Group By criterion. Moreover, it is not possible to group by a child data field (e.g., Assigned Date of Incident Investigators).*



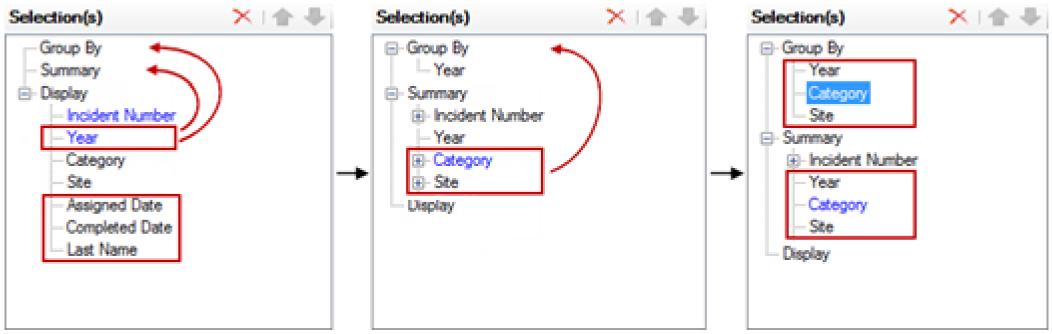
The Summary function is activated when at least one Group By field is selected. This will reflect in the view of the Selection(s) pane: the selected field name will automatically populate the pane under *both* Group By and Summary, while the field names that were listed under Display, will all be transferred to the Summary list.

If you delete a field name from the Group By list, all the fields contained under Summary will be transferred back to Display.

*Note: If your Display list contains fields from **child data** (e.g., Incident Investigators' Assigned Date, Completed Date, or Last Name), selecting a Group By field (e.g., Year) will transfer all the parent data fields to the Summary list and delete all the child data fields.*

2. In the query results, the system will perform data calculations on all the fields that appear under Summary. The fields' actual data values will not appear in the query results (unlike when they were selected for Display); only the products of the specified data calculation for the fields will appear. In order to see the actual data values *together* with the calculations, you will need to duplicate all the relevant field names under Group By using the Field(s) pane, as described above.

   To quickly locate the field names in the Field(s) pane, one by one click on the field names in the Section(s) pane. The system will automatically display the relevant field list in the Field(s) pane. Right-click the field you want to import to the Group By list of the Selection(s) pane and select Group By from the menu.



Some of these calculations are meaningful; for instance, the COUNT for Incident Number will produce counts of Incident records for specific categories by which you chose to group your query results (e.g., Category, Site). Others may refer to unique categorical entries (e.g., DISTINCT COUNT for Site or Year), and will not produce meaningful results, unless you choose to display the actual values of the field (i.e., transfer the field to the Group By list). Therefore, you will need to think very carefully about selecting the right fields for summaries (e.g., sums and averages for losses, counts for items), and leaving the rest as actual values (e.g., names of categories, sites, years).

Note: Once a field appears in both Summary and Group By lists, its calculation node disappears, which means that the system will display the actual value of the field (not a calculation) in the query results.

3. Proceed to save or execute the query.

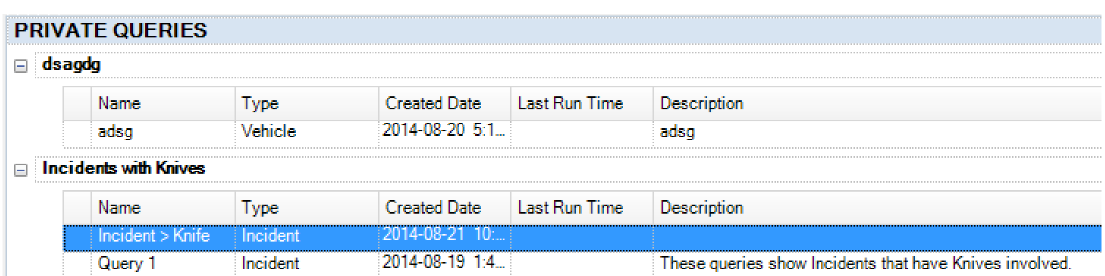
Save a Query

1. Complete the design of your query.

2. Store the query for access at a later date by clicking **Save** on the Ribbon.

Edit a Query

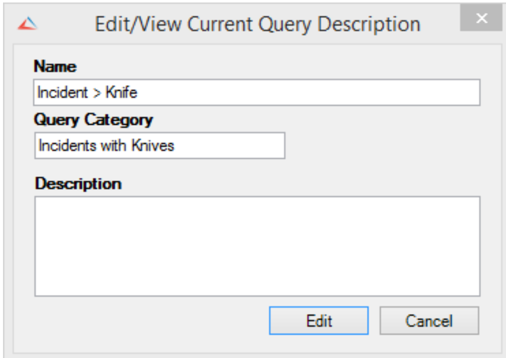
1. Make sure the query you want to edit is highlighted.



2. To open and begin editing the query, choose one of the following options:

- Click **Edit** on the Ribbon.
- Right-click in the listing pane, and select **Edit** from the drop-down menu that appears.

3. The Query dialog box will open.



- You can change the query Name, Category, and/or Description.

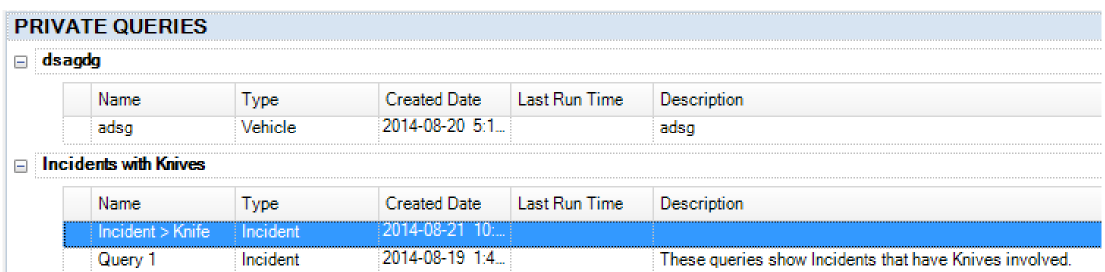
4. Click the **Edit** button to open the query or the Cancel button if you have selected the wrong query.

5. To view a query's specifications, select the query from the tree on the Navigation pane. Review the Form(s), Field(s), Selection(s), and Criteria information and make changes to the selected checkboxes, if necessary.

6. Store the query for access at a later date by clicking **Save** on the Ribbon.

Clone a Query

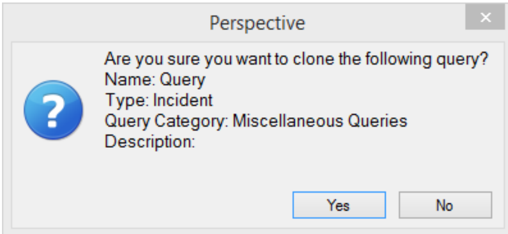
1. Make sure the query you want to clone is highlighted.



2. To clone the query, choose one of the following options:

- Click **Clone** on the Ribbon.
- Right-click in the listing pane, and select **Clone** from the drop-down menu that appears.

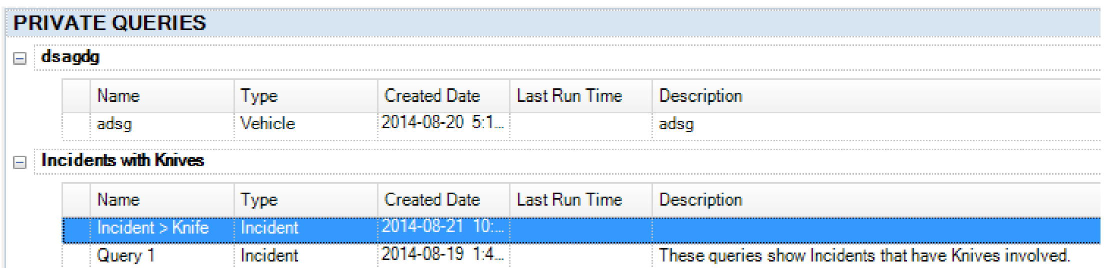
3. A prompt will appear, asking if you are sure you want to clone the query. Click the **Yes** button to clone the query, or No to cancel the cloning process.



Note: If you do not have Manage rights, you will be unable to clone a query. Additionally, you are only able to clone a query that has already been shared to you.

Share a Query

1. Make sure the query you want to share is highlighted.



2. To share the query, choose one of the following options:

   - Click **Share**  on the Ribbon.
   - Right-click in the listing pane, and select **Share** from the drop-down menu that appears.

3. The Share Query dialog box will open.

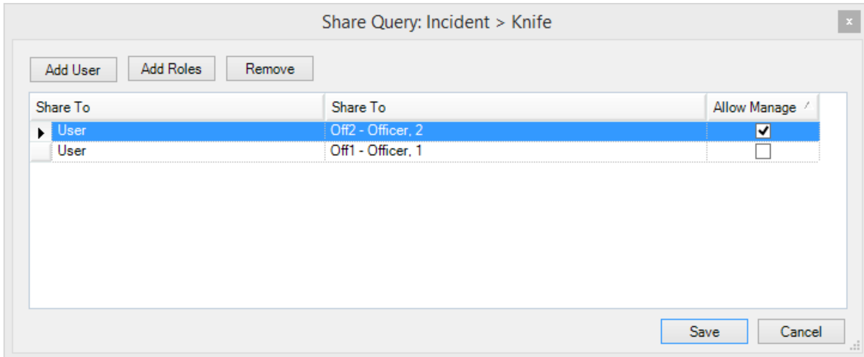
4. Click the **Add User** button and/or **Add Role** button.

5. Select the user(s) and/or role(s) you want to share the query to by typing his/her name and/or role in the text field, or scrolling through all users and/or roles.

6. Double-click the user's name and/or role to confirm your selection.

   - Click the **Allow Manage** checkbox if you want the user or users in a particular role to have the ability to edit, share, delete, or clone the shared query.
   - If you share to a user and a role, and that user is in the role as well, the query will be shared to him/her twice.

Note: If you give a user Manage rights when sharing a query, the user is able to modify the original query. To keep a copy of the original query that cannot be edited, clone it for yourself.



7. Click the **Add Roles** button.

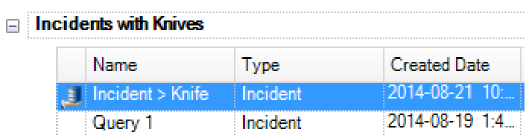
8. Select the role you want to share the query with by typing its name in the text field, or scrolling through all roles.

9. Double-click the role's name to confirm your selection.

   - Click the **Allow Manage** checkbox if you want those with that role to have the ability to edit, share, delete, or clone the shared query.

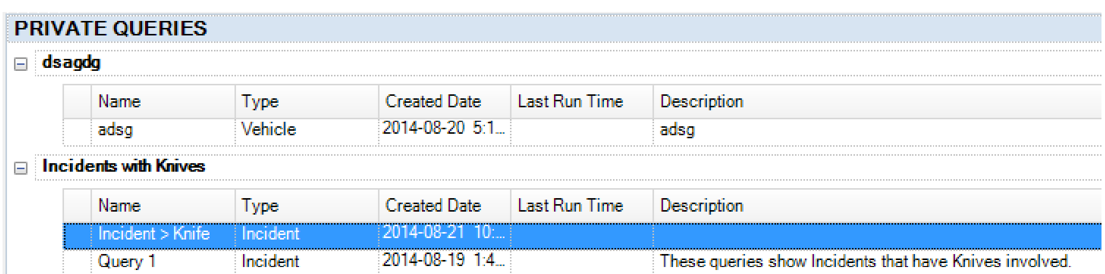
10. Click **Save**.

    - Shared queries will have the **Share** icon displayed beside the title.



Delete a Query

1. Make sure the query you want to delete is highlighted.



2. To delete the query, choose one of the following options:

   - Click **Delete** on the Ribbon.
   - Right-click in the listing pane, and select **Delete** from the drop-down menu that appears.

3. A prompt will appear, asking if you are sure you want to delete the query. Click the **Yes** button to delete the query, or No to cancel the deletion process.

Execute a Query

1. Once your query is created, you may either run it immediately, or save it for further use, and then run it. To run a saved query, select the name of the query you want to run from the query list in the listing pane.

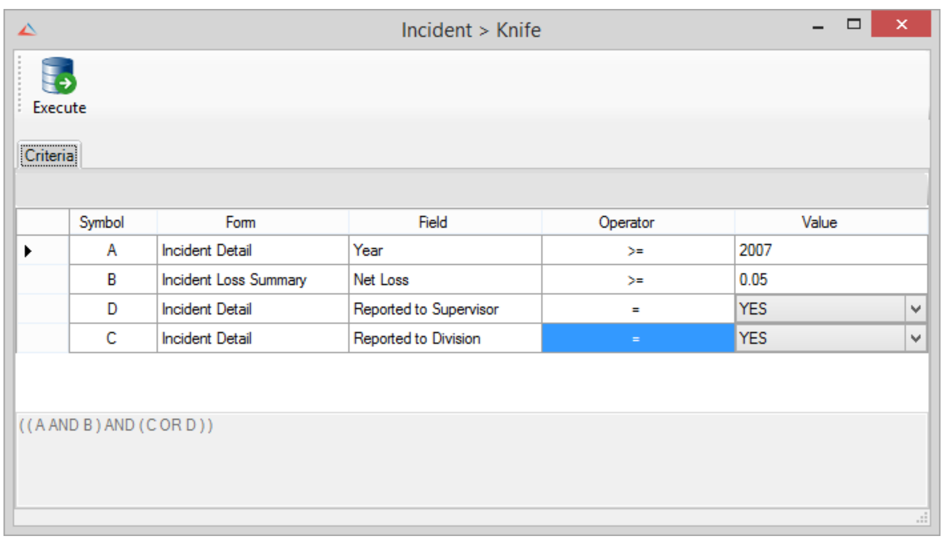
2. To execute the query, choose one of the following options:

   - Click **Execute**  on the Ribbon.

   - Right-click in the listing pane, and select **Execute** from the drop-down menu that appears.

3. A new window will open displaying the Criteria for the query. You do have the ability to modify the Criteria values if needed. Click the **Execute** button inside this window.

   Note: Queries can be run in the background. As a result, you can set up the next query, design a report, or review a record while waiting for the results notification to appear.



Track Query Runs

To track the history of query runs, open the **Audit** tab of the **Criteria Designer** pane. The tab will display the following information:

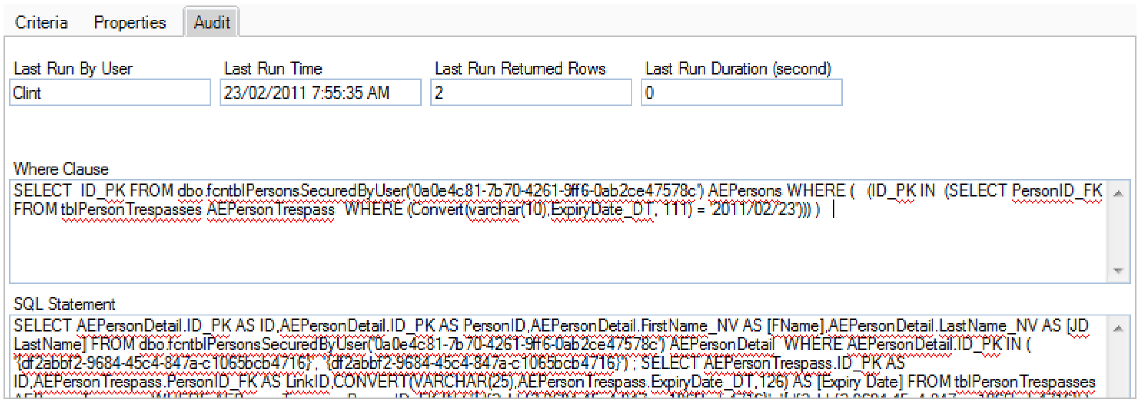
- ***Last Run By User:*** The user who last ran the query.

- ***Last Run Time:*** The time when the query was last run.

- ***Last Run Returned Rows:*** The number of data entries in the query results.

- ***Last Run Duration (second):*** The time Analysis Expert needed to generate the query.

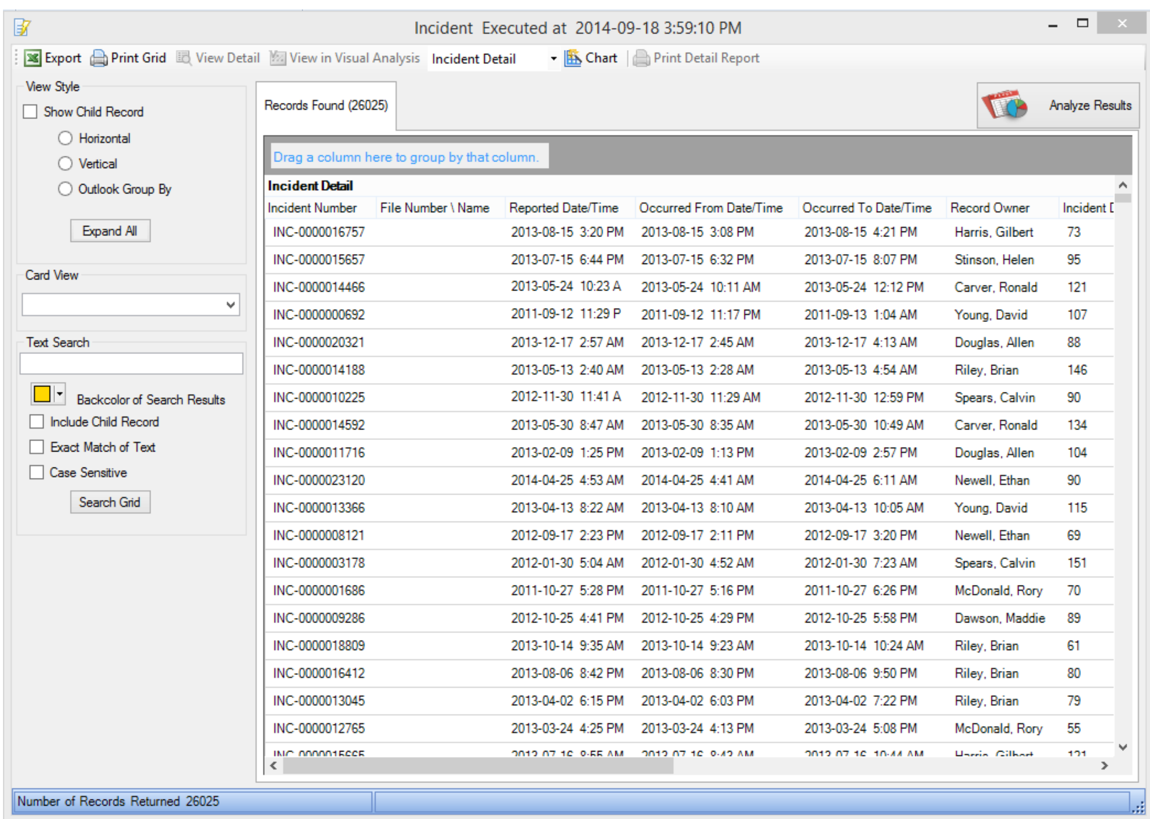
- ***Where Clause*** and ***SQL Statement:*** Technical data on the query data, criteria, and location.



Working with Query Results

View Query Results

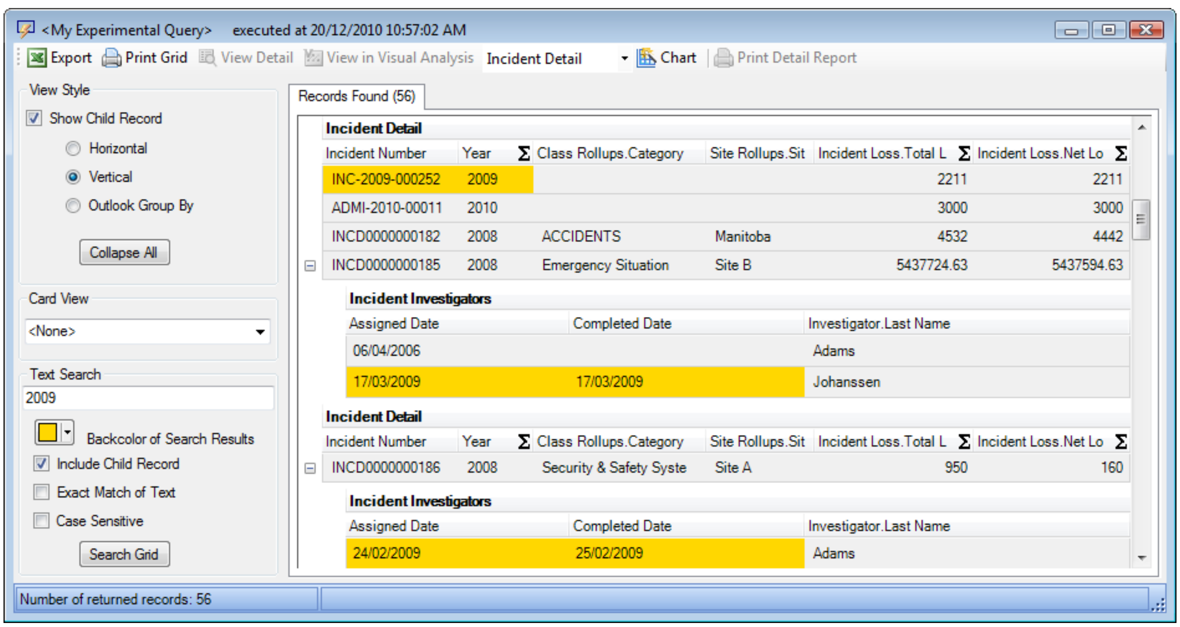
Once the query is “executed”, a new window will open with the results of the query displayed in the form of a grid. The number of returned records will be displayed at the bottom of the screen.



Search for Specific Data in Query Results

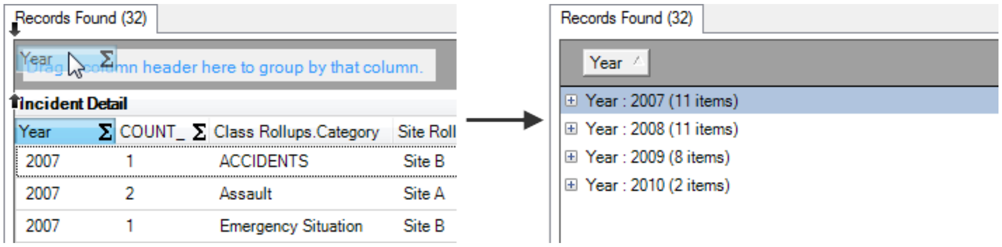
To search for specific data in your query results, use the **Text Search** function. Type a keyword in the Text Search field, and click **Search Grid**.

- The color of the highlighted search text can be modified using the **Backcolor of Search Results** lookup list.
- Check **Include Child Record** to search all records in the query results.
- Check **Exact Match of Text** to search only for text that corresponds exactly to the text entered in the Text Search field.
- Check **Case Sensitive** to only search for text containing the correct uppercase or lowercase characters specified in the search text.

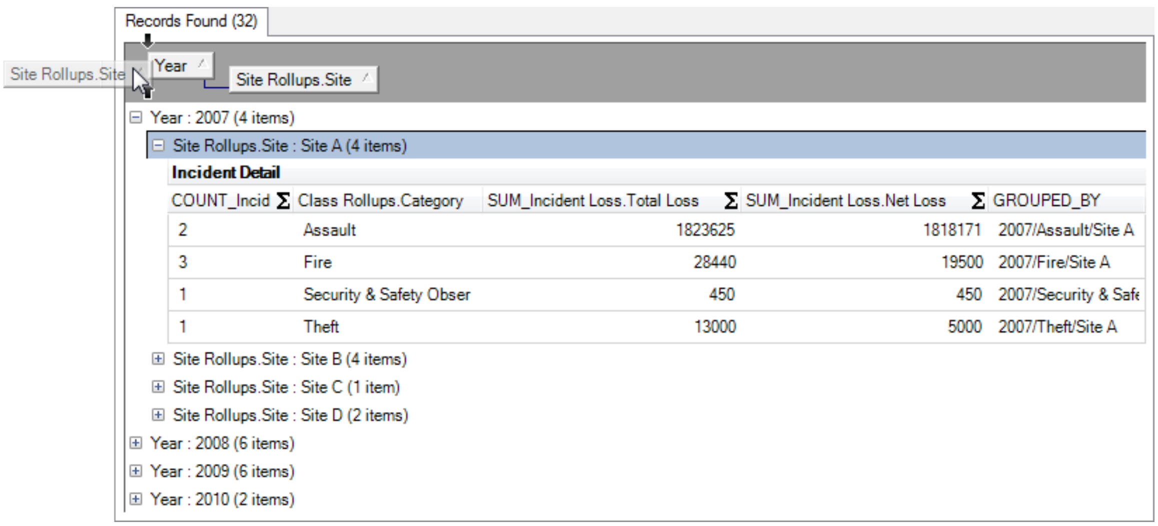


Group Query Results by a Field

- To **group the results by a field**, drag the column heading to the gray box above the grid and drop it. All query results will automatically collapse, grouped by the column heading you just selected. Grouped By query results may contain child records. To view child records, click **Expand All** to view all records contained under nodes. Once clicked, the name of this button will change to **Collapse All**. Click this to hide all child records again.



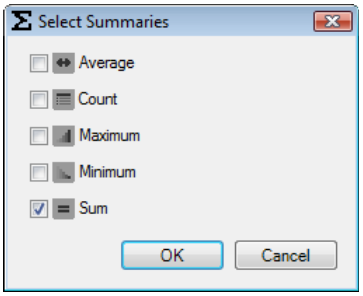
- To **add another tier to the grouping**, first expand one of the nodes to view its data in grid format. Then, click and drag a different column heading to the gray box. The query results will once again collapse, grouped first by your initial selection, and then by your second selection. You may continue to add tiers to your grouping using the same method.
- To **reorder the tiers in your grouping**, click and drag the column headings in the gray bar.



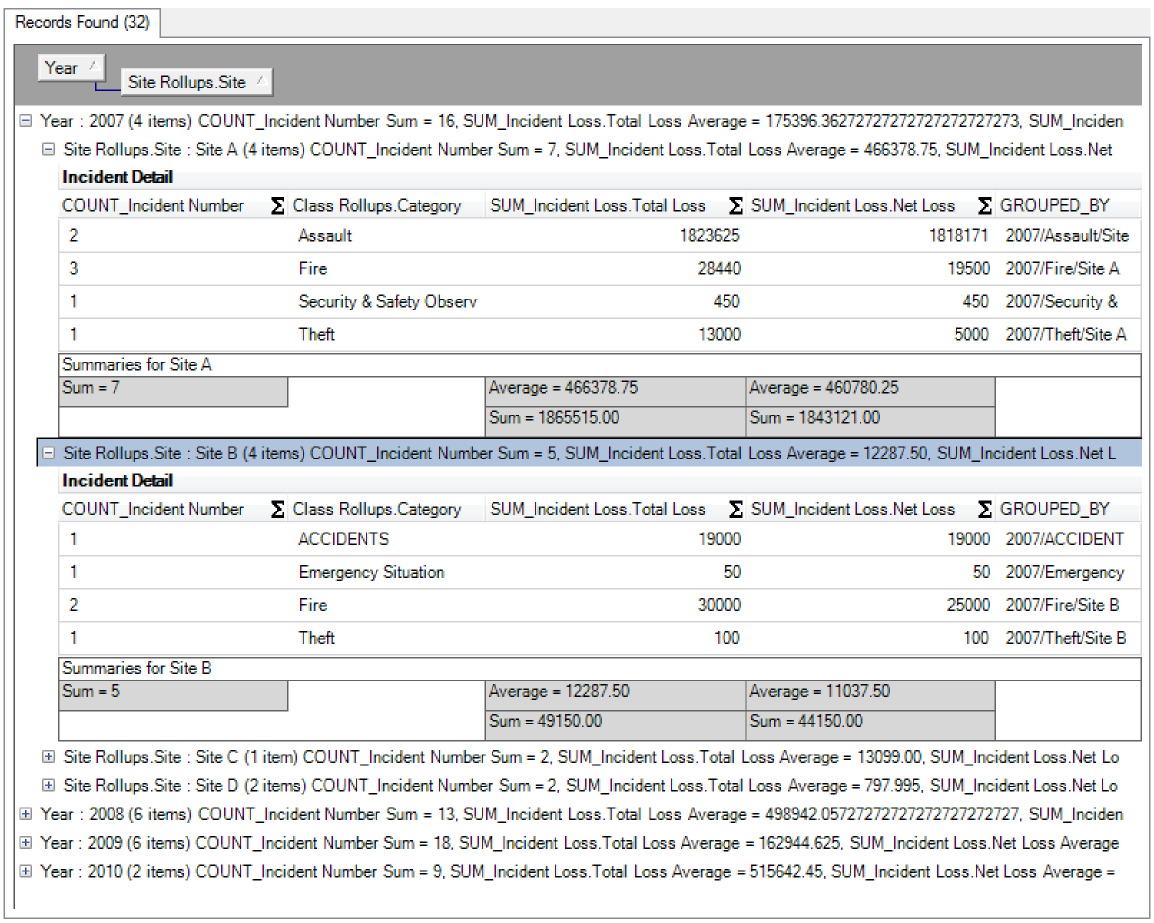
- To **remove a field from your grouping**, drag the column heading in the top gray bar and place it anywhere in the query results screen.

Perform Calculations on Query Results

1. To perform calculations on data in query results that were created using the Group By option, select the **Outlook Group By** radio box in the View Style section. The **Sigma** (**Σ**) symbol will appear on all column headings. (If the Group By function was used to build the query, Sigma will automatically appear on column headings.)
2. To perform data calculation on a column of data, click the **Σ** button at the top of the respective column. The Select Summaries dialog box will open.
3. Select the type of calculation that is required for the column (Average, Count, Maximum, Minimum, and/or Sum). You can select more than one calculation option.
4. Click **OK**.



The calculation results will be displayed below the appropriate columns at the bottom of the query results. If your results were grouped by a field within the query results window, then the calculations will apply and be displayed for each group.



Export Query Results

1. To export query results, click **Export** on the top toolbar. A Windows Explorer window will open.

2. Choose the location for the new file and name the file and indicate the file type (e.g., Excel-Data (*.xls). Click **Save**.

3. You will receive a confirmation message stating the export was successful. Click **OK**.

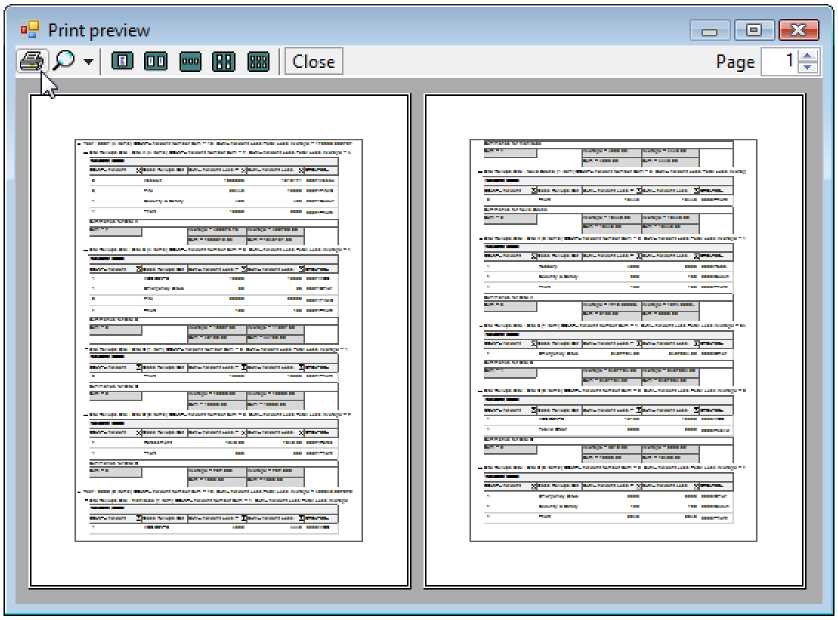
Print Query Results

1. To **print the query results**, first estimate the layout of your grid in relation to the **portrait layout**. If deemed necessary, scale the query results window to fit one portrait page.

2. Click **Print Grid** on the top toolbar. A Print Preview window will open.

3. Review the layout of the grid using the toolbar at the top of the screen.

4. Click the **Print** icon to print the grid.



Access Records in Query Results and Print Reports

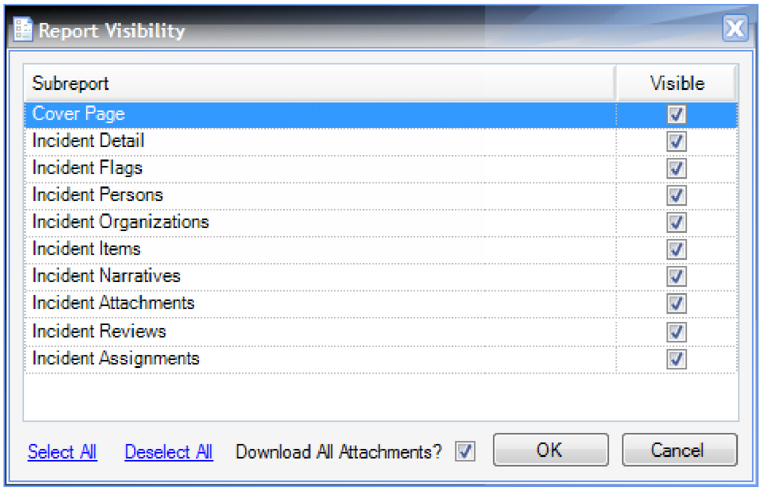
Note: These functions are not available if the Group By function was used to build the query.

To view a record from the list of records contained in your query results, select the record and click **View Detail**. The record will open in a separate window in the read-only mode.

To **print**, **email**, or **save** one of the records listed in the query results, follow the steps below:

1. Select the record and click **Print Detail Report**.

2. A Report Visibility window will appear. This window contains checkboxes for all report sections containing data. By default, all boxes will be checked. Uncheck the boxes for any sections you do not want to appear in your report. Check the "**Download All Attachments?**" box if you want to download the attachments included in the record for printing. Then, click **OK**.



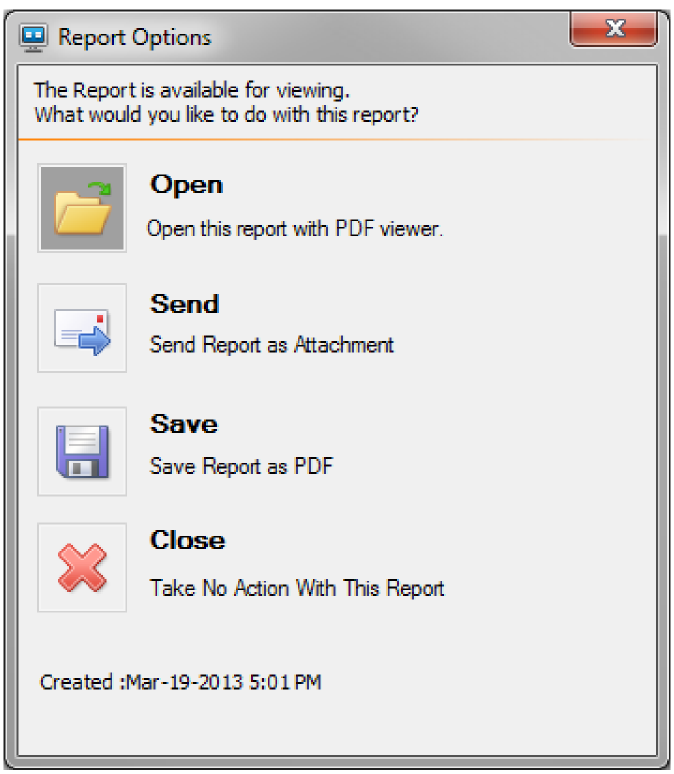
3. The **Report Options** window will open.

   a. Click the **Open** icon to instantly view a printable PDF copy of the report.

   b. Click the **Send** icon to send an email message with a PDF copy of the report attached.

   c. Click the **Save** icon to save a PDF copy of the report to the location of your choice.

   d. Click the **Close** icon to cancel the report.



Construct a Visual Link Chart From Query Results

With Perspective Visual Analysis, you can create a visual link chart representing the data relationships between records listed in the query results.

Note: If the Group By function was used to build the query, this feature will be disabled.

Click anywhere in the query results and then select **View in Visual Analysis**. A separate Perspective Visual Analysis window will open with all the records listed in the query results contained within.

See the *Perspective Visual Analysis* section for further information on building a link chart, or click the Help icon in the Visual Analysis window.

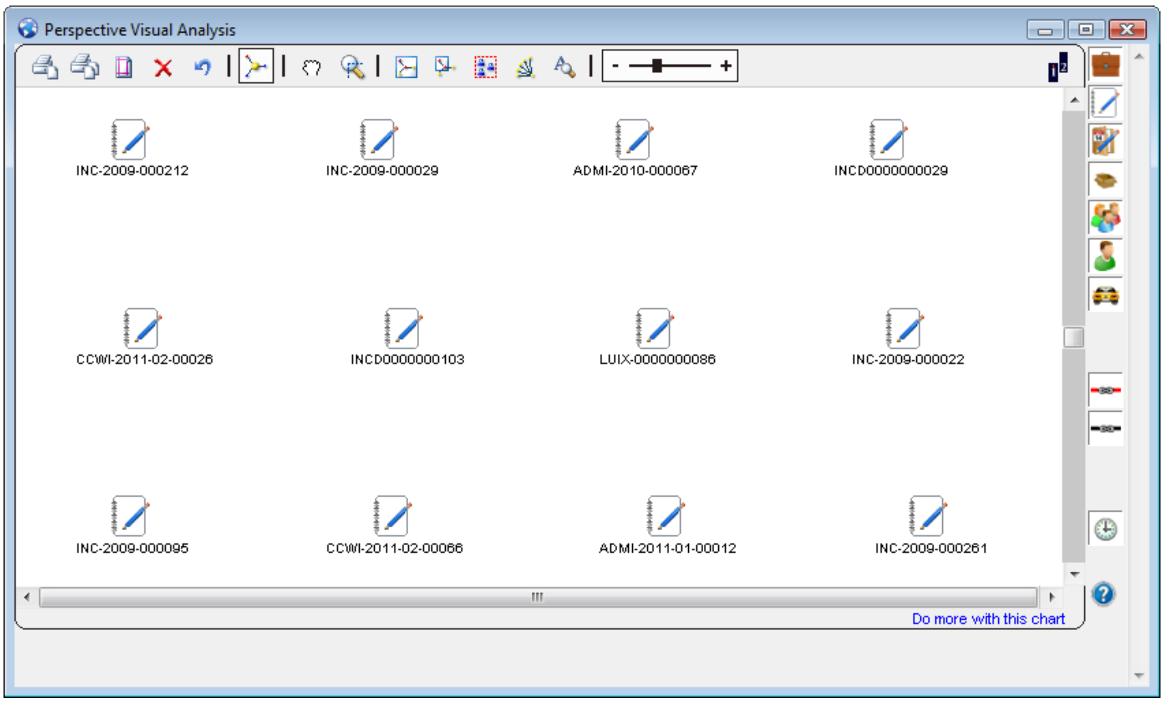


Chart Query Results

1. To begin charting your query results, click **Chart**. If your query results contain child data, you may choose to chart either parent records (e.g., Person Detail) or child records (e.g., Person Incidents Involvement) by selecting the appropriate data label under the attached lookup.

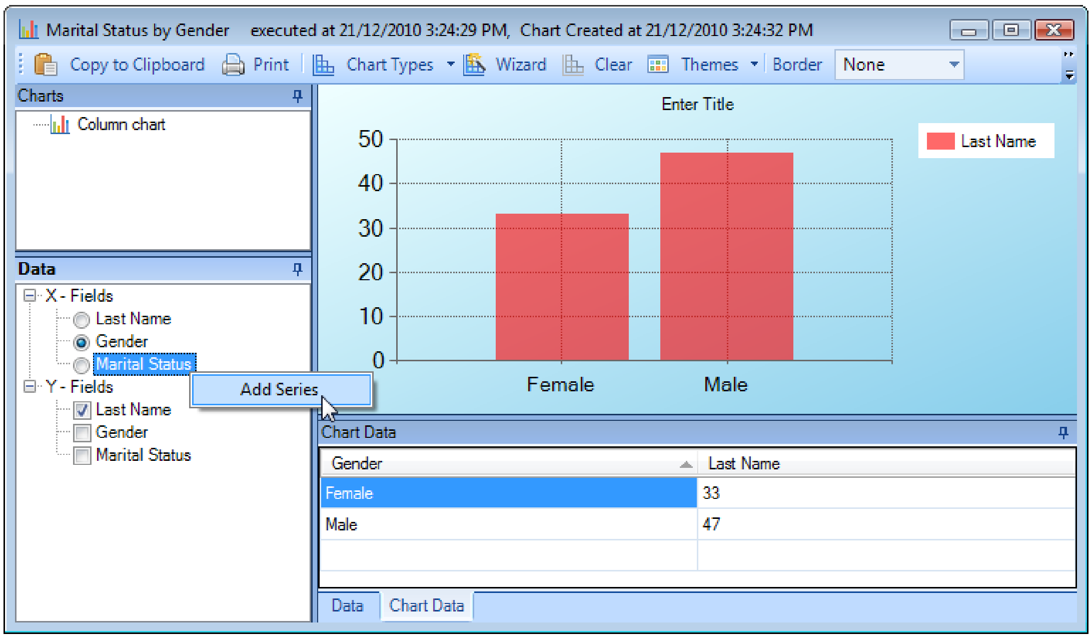
2. A charting window will open with a blank Viewing pane, a list of variables available for charting listed in the **Data pane** on the left, and a grid with raw chart data listed at the bottom **Data tab**. (In this section, we will be looking at the case of an organization that wants to know the proportions of marital statuses of their employees by gender.)

3. In the Data pane, select an **X-Field** (e.g., Gender) and a **Y-Field** or multiple Y-Fields (e.g., Last Name) for your chart from the available options. The X-Field data will appear on the

horizontal x-axis of your chart. The Y-Field data will appear on the vertical y-axis of your chart. If you select more than one Y-Field, ensure that they have the same unit of value (e.g., dollars, items). Note that Y-Fields are always charted as numerical values. Generally, text fields are counted (e.g., quantity of Incident Numbers or Last Names), while numerical fields are summed (e.g., amounts of Incident Losses).

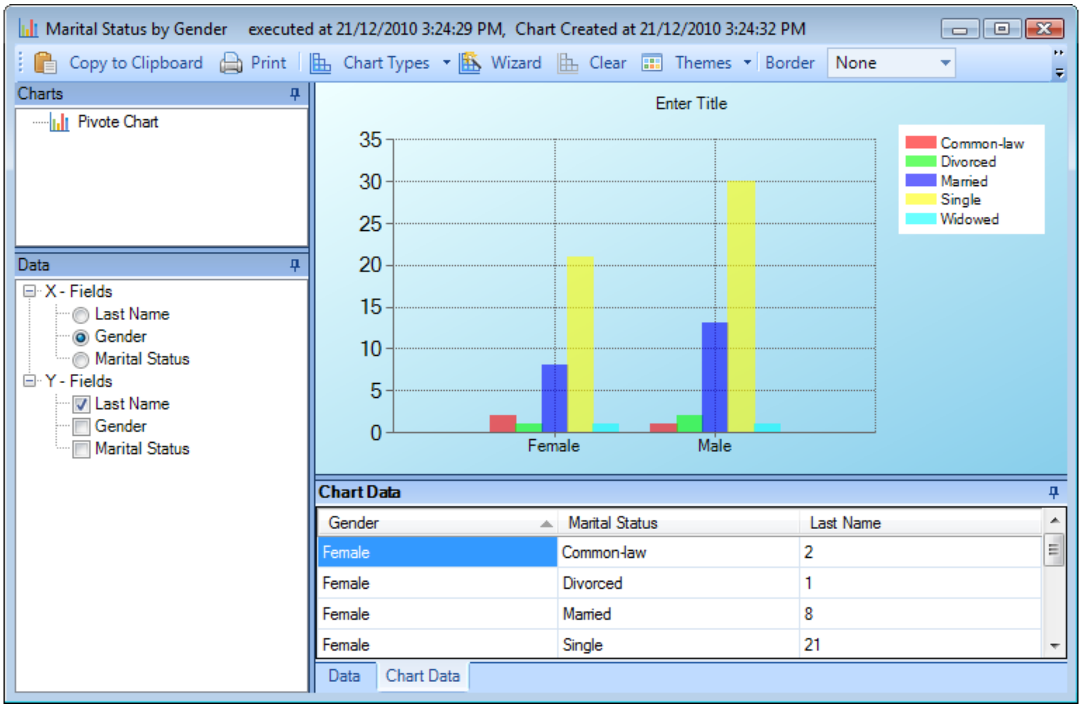
4. Your chart will appear in the Viewing pane. By default, your initial chart will be formatted as a column chart. The bottom pane will display your selected **Chart Data**.

5. You may copy and paste data from the Data or Chart Data tabs into Excel by highlighting the data and then using the Ctrl+C and Ctrl+V keyboard commands.



6. If you want to select an additional variable for your chart (e.g., Marital Status) to see the distribution of one of your variables by another (e.g., Marital Status by Gender), right-click the variable under X-Fields, and select **Add Series**. The chart type will switch to a pivot chart. The new variable will be added to the x-axis and will be explained in the chart's legend.

Note: Once a Series variable is incorporated into your chart, only one Y-Field will be charted. Additional Y-Fields will automatically be dropped from your chart.



7. If the chart **does not have a series field**, you may use the available toolbar options to adjust its appearance. These options are also available with a greater range of functionality in the Chart Wizard. For description of the various chart customization options in Chart Wizard, see "Appendix D: Chart Wizard".

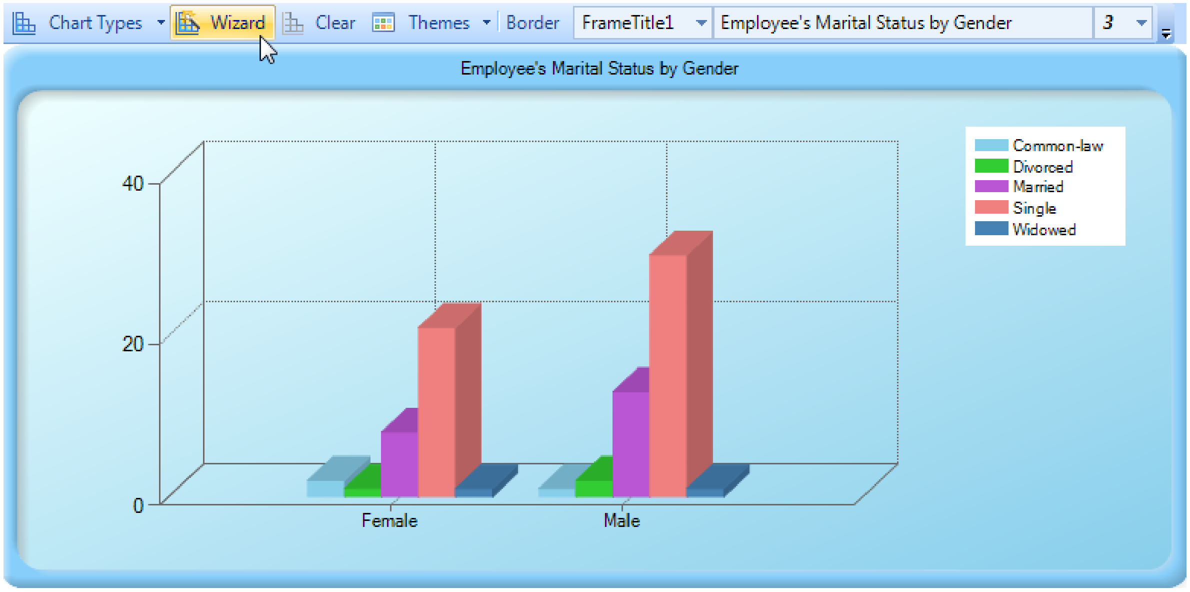
   a. To change the default column chart to a different chart type, choose an option from the **Chart Types** lookup list (e.g., pie, bar, area). The Charts pane will automatically populate with the name of the selected chart.

   b. To change the default **2D** (two-dimensional) chart to a **3D** (three-dimensional) chart, choose **3D** in the drop-down menu on the toolbar. Click and drag the chart to rotate it and adjust its perspective.

   c. Enter a name for the chart in the **Title** text box.

   d. From the **Border** lookup list, select a border or frame style for the chart.

   e. In the **Themes** lookup list, select a color theme for your chart.



If the chart **does include a series field**, any customizing of the chart, including changing the chart type, must be done in the Chart Wizard.

8. To **copy your chart to clipboard** or **print it** , click the appropriate icon on the toolbar.

9. If you want to **erase this chart** and construct a new chart of the query results, click **Clear** on the toolbar, or right-click in the chart area and select Clear.

Analyze Results

Analyze Results allows you to choose how you view your query results. You can filter by variables and continually modify the results displayed. You can change the appearance of your results, as well as narrow or expand your results by hierarchy levels, building locations, criminal activity type, etc. The Pivot Grid in the Analyze Results module allows you to determine the data you want displayed, while the Data Chart section and Pie Chart section gives you the ability to dig deeper into your results and display them in a visually appealing way.

Table

The table section of Analyze Results is where you decide what to analyze and how you want it to be displayed.

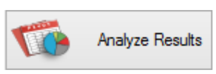
1. In the Navigation pane, open the **Analyze and Report** module.

2. From Analysis Expert, choose the query record that you want to view. To execute the query, do one of the following:

    - Click **Execute**  on the Ribbon.

    - Right-click in the listing pane, and select **Execute** from the drop-down menu that appears.

3. If you have user rights, you may make modifications to the **Value** field in the window that appears. Then click the **Execute**  button.

4. Click the **Analyze Results** 

button.

5. The Analyze Results window will open. By default, you will be in the **Show as Table** tab. From here, you can begin organizing and filtering your data into a table.

6. Choose the variables you want to see displayed in your table by dragging them from the **Fields** section into the **Filters**, **Columns**, **Rows**, or **Measures** windows.

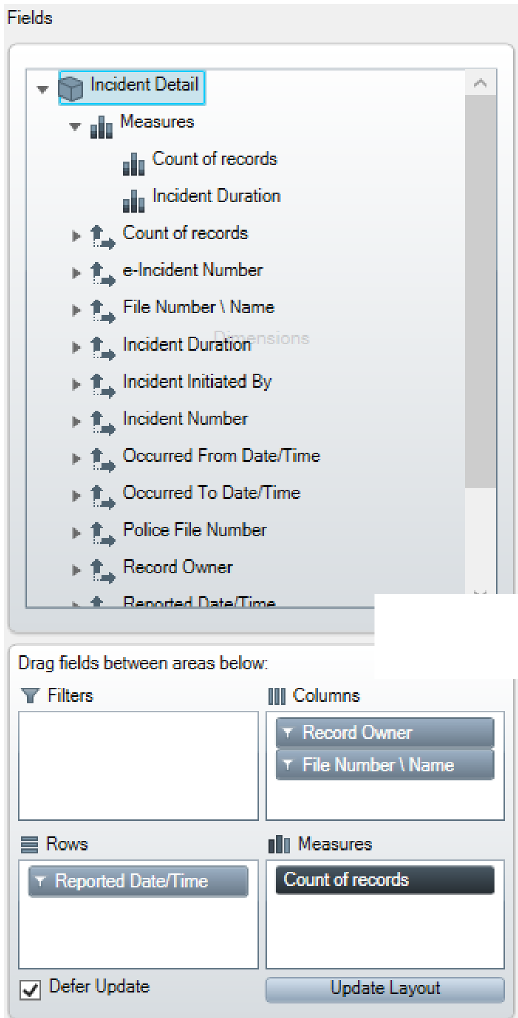
    - **Filters**: Allows you to limit the data you see by filtering out the fields you don't want displayed. Select the variables you want to filter by.

      Note: You can change the variables on the Tables, Data Charts, and Pie Charts tab.

    - **Columns**: Organizes the selected fields into columns.

    - **Rows**: Organizes the selected fields into rows.

    - **Measures**: Shows a count of the data you want displayed.

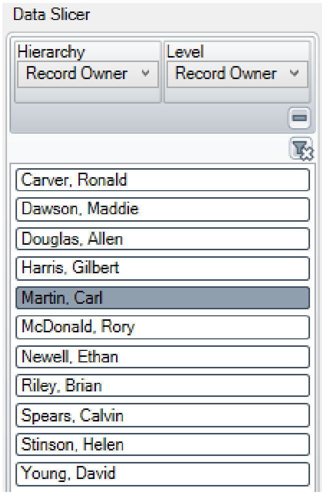


Note: Selecting the Defer Update checkbox will prevent your data from automatically being shown on your screen. If this checkbox is selected, you will have to click the Update Layout button whenever you want to see a current display of your data.

7. Once you have selected the data you want to appear in the table, you can dig deeper by using the Data Slicer to narrow or expand your results by hierarchy and level.

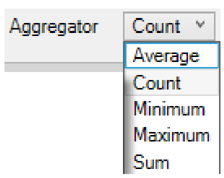
   - Once you have decided how you want to slice your data, click on the specific hierarchy and level you want to view.

   Note: To hide the hierarchy and level drop-down menus, click the button. To bring it back into view, click the button. Additionally, if you want to reset the hierarchy and level, click the button.



Note: You can hide the Data Slicer section of Analyze Results by clicking the button, found in the top left corner of the Analyze Results window. Click the button to bring the Data Slicer back into view.

8. To show different counts of your data (Average, Count, Minimum, Maximum, or Sum), use the Aggregator drop-down menu.



9. Now that you have organized your data by the information you want displayed, you can do any of the following:

   - Click the **Export to Excel** button.
   - Click the **Show as Data Chart** tab to view your results in a chart.
   - Click the **Show as Pie Chart** tab to view your results in a pie chart.

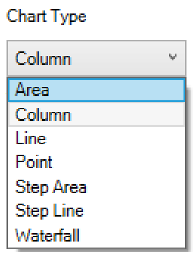
Note: You can save how your results are displayed by clicking the Add button in the upper left corner of the Analyze Results window. Type a name for your saved view and press the Save button (which appears after you click Add). To cancel, click the Cancel button. Saved views are visible to people you share the queries with. Each shared query has a common set of saved views. This means that if anyone adds a view to a shared query, everyone that query is shared to will be able to see it.

Data Chart

The data chart tab allows you to modify how you view your data results. The following section will give you an in-depth understanding of the options you can use in the Data Chart section of Analyze Results.

1. Click the **Show as Data Chart** tab.

2. From the **Chart Type** drop-down menu, select the type of chart you want your results to be displayed in.



3. Enter a title for your chart in the **Title** field.

4. Enter a subtitle for your chart in the **Subtitle** field.

5. Select the **Show Marker Values** checkbox to see exact counts.

6. Select the **Enable DataPoint Tracking** checkbox to allow you to track exact numbers for different variables. Hover over the chart to have these numbers displayed.

7. Select the **Show Shadows** checkbox to better define particular variables on your chart.

8. Select the **Show Zoom Options** checkbox if you want to be able to zoom into specific areas of your chart. To do this, hover over the small replica of your chart to decide if you want to:

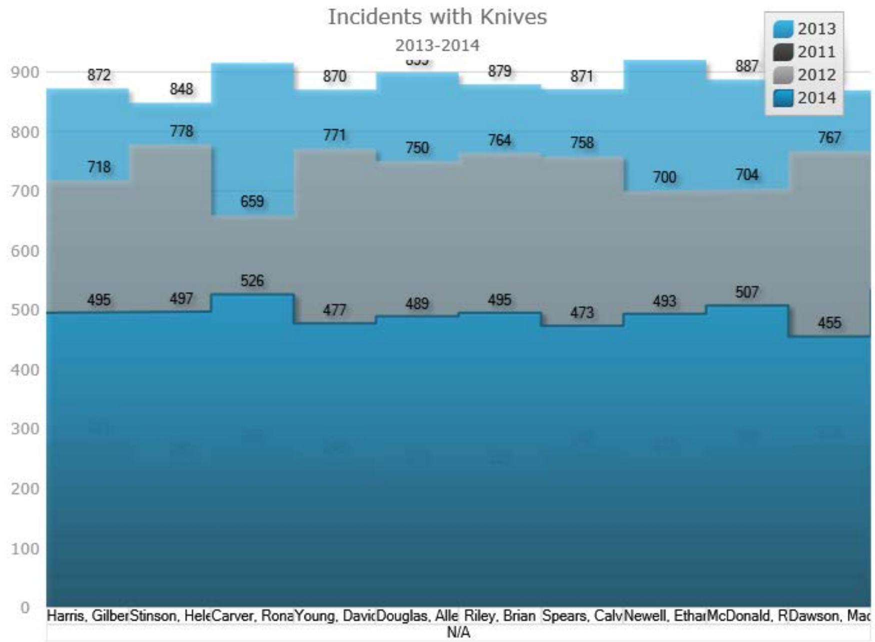
   - Zoom out
   - Zoom in
   - Reset your zoom to default , or
   - Select the default mouse drag interaction by right-clicking the button (zoom into selection area , or pan)

   Note: If you Copy Chart as Image, you need to deselect the Show Zoom Options checkbox or else it will appear in your copied image.

9. By default, the Show Legend checkbox is selected. To hide the legend, deselect the **Show Legend** checkbox.

10. From the **Legend Position** drop-down menu, select where you want your legend to appear in relation to the chart.

11. You can copy the chart and paste it into a document (e.g., Microsoft Word or Excel). To do this, click the **Copy Chart as Image** button, open the program that you want to copy the chart to, and paste it. Or, you can save your chart to your desktop by clicking the **Save Chart as Image** button.

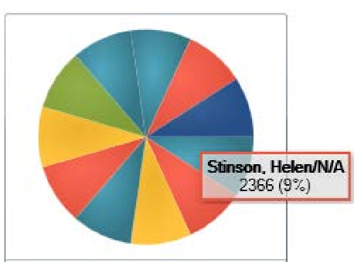


Note: Hide the charting options by clicking the Chart Options button. Bring the options back into view by clicking the button.

Pie Chart

The Pie Chart tab, while a different type of chart from the Data Charts tab (with different options to view your results by), allows you to modify how you view your data results. The following section will give you an in-depth understanding of the options you can use in the Pie Chart section of Analyze Results.

1. Click the **Show as Data Chart** tab.
2. Enter a title for your chart in the **Title** field.
3. If you want to see exact numbers, hover your mouse over the pie chart.



4. You can copy the chart and paste it into a document (e.g., Microsoft Word or Excel). To do this, click the **Copy Chart as Image** button, open the program that you want to copy the chart to, and paste it. Or, you can save your chart to your desktop by clicking the **Save Chart as Image** button.

Note: Hide the charting options by clicking the Chart Options ⌄ button. Bring the options back into view by clicking the ⌃ button.

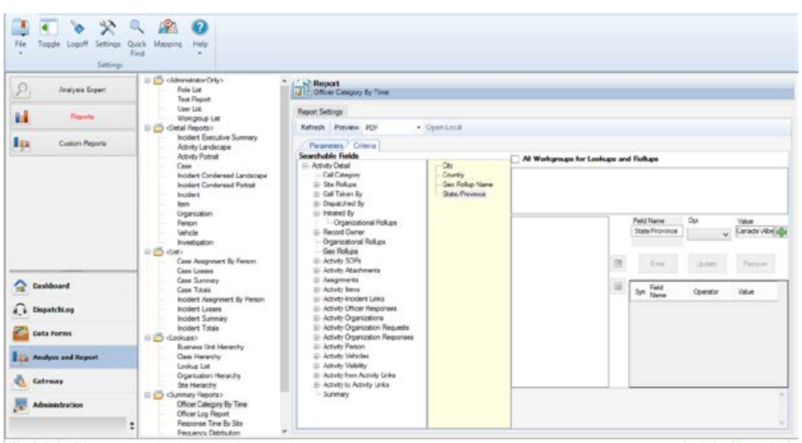
Reports

Perspective contains a number of preset reports that you may use to generate statistics and analyze trends in your data.

User Interface

The interface of the Reports component of Perspective is built around the specific type of report that is selected from the Navigation pane, and can be roughly divided into three parts:

1. **Navigation pane:** Allows you to select various preset reports from five general categories. Once selected, the name of the report will appear at the top of the Report System pane.
    - ***Administrator Only:*** Reports that list groups of administrative hierarchies available in Perspective (e.g., Roles, Users, etc.).
    - ***Detail Reports:*** Condensed summaries of individual records stored in Perspective.
    - ***List:*** Reports that contain lists of records, assignments and losses.
    - ***Lookups:*** Reports that list values available in various Perspective's lookups.
    - ***Summary Reports:*** Reports with a summary of data analysis; results are summarized in assorted bar and pie charts.
2. **Report System pane:** Assists in filtering data for future reports and executes their creation.
3. **Report Settings toolbar:** The invariable part of the Report System pane that provides options for refreshing the report settings view, generating reports in PDF, and opening previously run reports locally.
4. **Report Settings pane:** The variable part of the Report System pane that displays tabs, panes, and tools for specifying parameters for the data used in your report.



Types of Reports

Administrator Only

- ***Role List***: Lists all system roles, along with their respective descriptions and organizational rollups.
- ***Test Report***: For testing purposes only; successfully running this report demonstrates that SQL Reporting Services is operating properly.
- ***User List***: Lists all system users, along with their assigned security controls (roles, workgroups, organizational rollups, and access levels), and groups them by a security control of your choice.
- ***Workgroup List***: Lists all workgroups, along with their respective descriptions, organizations, and Perspective e-Reporting access status.

Detail Reports

- ***Incident Executive Summary***: Displays the selected Incident record in brief detail, providing a short summary of the incident, its investigation and outcome, which is intended for managerial review.
- ***Activity Landscape***: Displays the selected Activity record in great detail in a landscape-format report.
- ***Activity Portrait***: Displays the selected Activity record in great detail in a portrait-format report.
- ***Case***: Displays the selected Case record.
- ***Incident Condensed Landscape***: Displays the selected Incident record in great detail in a landscape-format report.
- ***Incident Condensed Portrait***: Displays the selected Incident record in great detail in a portrait-format report.
- ***Incident***: Displays the selected Incident record, including some of its investigation data.
- ***Item***: Displays the selected Item record.
- ***Organization***: Displays the selected Organization record.
- ***Person***: Displays the selected Person record.
- ***Vehicle***: Displays the selected Vehicle record.
- ***Investigation***: Displays investigation data from the selected Incident record.

List

- ***Case Assignment By Person***: Lists all case-related assignments along with key assignment details, such as the particular case in which the assignment was created, the user who created the assignment, and the user who was given the assignment.
- ***Case Losses***: Groups and totals case loss values by category, manager, supervisor, status, or workgroup; results are displayed in list form and are summarized in a bar chart.
- ***Case Summary***: Groups and totals cases by category, manager, supervisor, status, or workgroup; results are displayed as brief case summaries.
- ***Case Totals***: Groups and totals cases by category, manager, supervisor, status, or workgroup; results are displayed in list form and are summarized in a bar chart.

Note: The above four Case reports are only available in the ICM and EIM Editions of Perspective

- ***Incident Assignment By Person***: Lists all incident-related assignments, along with key assignment details, such as the particular incident in which the assignment was created, the user who created the assignment, and the user who was given the assignment.
- ***Incident Losses***: Groups and totals incident loss values by business unit, class, organizational rollup, site, or workgroup; results are displayed in list form and are summarized in a bar chart.
- ***Incident Summary***: Groups and totals incidents by business unit, class, site, status, or workgroup; results are displayed as brief incident summaries.
- ***Incident Totals***: Groups and totals incidents by business unit, class, disposition, organizational rollup, owner workgroup, or site; results are displayed in list form and are summarized in a bar chart.

Lookups

- ***Business Unit Hierarchy***: Lists all combinations of lookup list values for the four-tier business unit rollup.
- ***Class Hierarchy***: Lists all combinations of lookup list values for the four-tier class rollup.
- ***Lookup List***: Lists all System English values for the selected lookup list, as well as their alternative labels in other languages.
- ***Organization Hierarchy***: Lists all combinations of lookup list values for the four-tier organizational rollup.
- ***Site Hierarchy***: Lists all combinations of lookup list values for the four-tier site rollup.

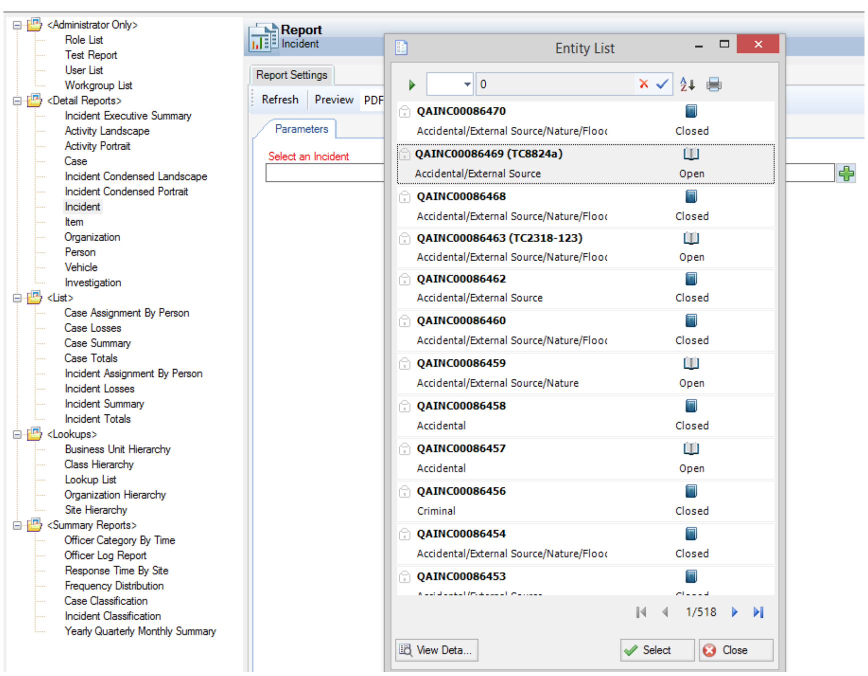
Summary Reports

- ***Officer Category By Time***: Calculates the time officers spent on activities providing the number of activities, the total and the average time, and the percentage of the total time per activity category.
- ***Officer Log Report***: Lists the officer log status changes by officer, including such details as Call Sign, Location, Status, Date/Time of the change, and Notes.
- ***Response Time By Site***: Provides short activity processing summaries by activity category, including activities' Start Time, Arrive Time, End Time, and calculating the Response Time and the Total Time per activity and per category.
- ***Frequency Distribution***: Compares the total number of incidents that took place in two separate time periods by year, quarter, month, weekday, and hour; results are summarized in bar charts.
- ***Case Classification***: Groups and totals case loss values by category; results are summarized in assorted bar and pie charts.
- ***Incident Classification***: Groups and totals incident loss values by class and category; results are summarized in assorted bar and pie charts.
- ***Yearly/Quarterly/Monthly Summary***: Provides descriptive statistics for the number of incidents that took place during the time periods of years, quarters, and months; results are summarized in bar charts.

Creating a Report

1. Select a report from the list in the Navigation pane.
2. The **Parameters** tab will open by default. Each report has a unique set of one or more parameters that can be specified before running your report. As in all other Perspective forms, red parameter fields are required and all others are optional.
    - ***Select a Language***: Choose a label set or a language of your report (e.g., System English).
    - ***Select Group By***: Choose the entity your report's results will be grouped or organized by (e.g., Access Level, Role, Workgroups, Status, Class Rollup).
    - ***Select a Date Range***: Set a date range(s) your report's data will be drawn from. Some reports may provide an option of selecting more than one date range for comparison.
    - ***Year/Quarter/Month*** *(for the Frequency Distribution Report):* Select the time period for which you would like your report to display statistics.

- ***Workgroups*** checkboxes: Select the workgroups you would like the report to generate statistics from. Check All Workgroups to select all workgroups in the list.
- ***Select a Business Type***, ***Class Type***, ***Lookup Type***, ***Org Type***, or ***Site Type***: Specify the particular lookup list or rollup for which you would like to view available options or values.
- ***Select an Officer*** *(only for Officer reports)*: Choose the officer for which you would like to see the report data.
- ***Select an Activity, Incident***, ***Case*** *(Perspective ICM and EIM only)*, ***Item***, ***Organization***, ***Person***, or ***Vehicle***: Indicate the particular entity your report will be based on (e.g., Incident record INC-2010-000124, Jane Doe’s Person record).
- ***Select Series*** *(only for Totals reports):* Specify the entity that your report’s charts will be grouped or organized by, next to the selected Group By field (i.e., Status, Disposition, Access Level, or Workgroups).
- ***Select Net Loss Over/Under*** *(only for the Yearly / Quarterly / Monthly Report):* Specify the Net Loss threshold value by which you would like to organize your report.
- ***Completed?*** *(only for Assignment reports)*: Indicate whether you would like completed, incomplete, or both completed and incomplete assignments to be included in your report.
- ***Include Locked?*** *(only for the Role List report):* Indicate whether or not you would like locked roles to be included in your report.



3. In addition to the Parameters tab, some **Summary Reports** have an option of filtering data that you would like to include in your report. To further qualify your report results, select the **Criteria** tab.

   a. Check the **All Workgroups for Lookups and Rollups** box to search across lookup lists and rollup values for all workgroups.

   b. In the **Searchable Fields** pane, select a form entity to display its available fields in the yellow pane to the right.

   c. Highlight and right-click a field you would like to specify settings for, and select **Search By** to add the field to your search criteria. The chosen field will automatically populate the **Field Name** box in the search pane on the right half of the screen.

   d. Select a field operator from the **Opt** lookup list (e.g., =, >).

   e. Enter the comparative value in the **Value** field or select an option from the list by clicking on the plus icon .

   f. Click **Enter** to add the field specification to your report search criteria.

      Every time you add a new field specification to the search criteria, the pane on the left will populate with a new symbol associated with the added criterion (e.g., A, B, C). The arrangement of the symbols in the pane defines the relationships between the criteria, which are also reflected in the Boolean logic statement outlined below. By default, every criterion added is in the OR relationship with the previous and next.

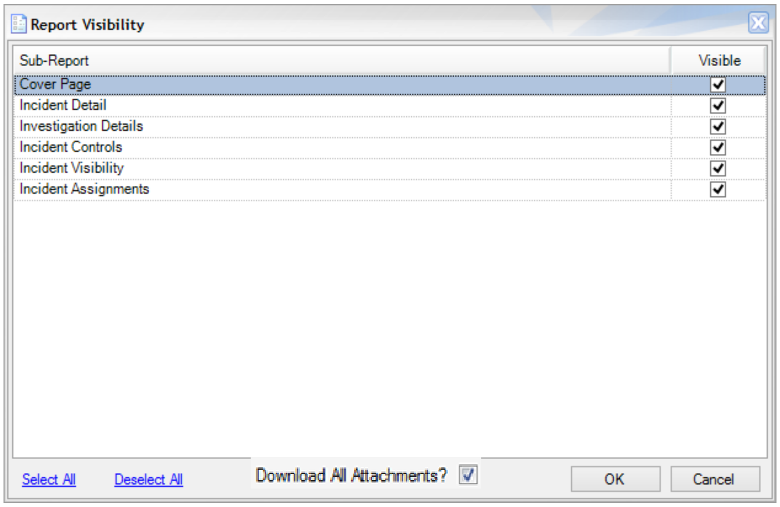
   g. To modify these relationships (and the logic statement), creating an internal hierarchy within the criteria, select a symbol from the pane on the left and click the adjacent up or down arrows. Criteria that appear in separate nodes are in the OR relationship to each other, while criteria that appear in sub-nodes are in the AND relationship to the main criterion at the top of the node.

   h. To modify your search criteria, select the criteria you want to modify, make changes in the Opt and Value fields, and click **Update**. The changes will be applied to the criterion on both the level of the criteria list and the Boolean logic statement.

   i. To remove a field from your search criteria list, select the field and click **Remove**.

4. Click **Preview** in the Report Settings toolbar to generate the report.

5. For some reports, you will have to select parts of the report that you want to include in the report from the **Report Visibility** window. This window contains checkboxes for all report sections containing data. By default, all boxes will be checked. Uncheck the boxes for any sections you do not want to appear in your report. Check the "**Download All Attachments?**" box if you want to download the attachments included in the record for printing (this checkbox only appears if the report includes attachments). Click **OK**.



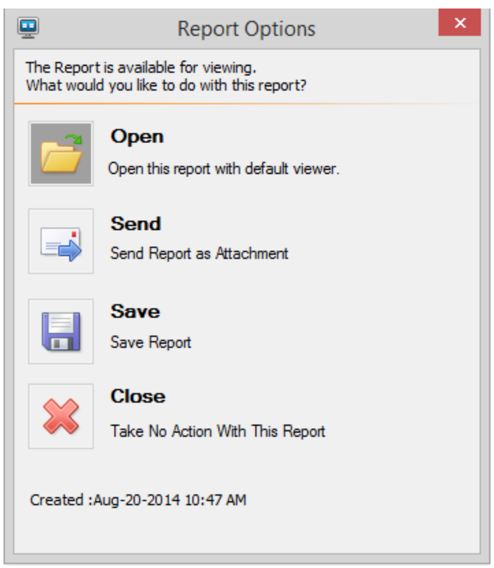
6. A **Report Options** window will open.

   a. Click the **Open** icon to instantly view a printable PDF copy of the report.

   b. Click the **Send** icon to send an email message with a PDF copy of the report attached.

   c. Click the **Save** icon to save a PDF copy of the report to the location of your choice.

   d. Click the **Close** icon to cancel the report.



7. To access the most recently generated report, click the **Open Local** button in the Report Settings toolbar.

   Note: The Preview button should always be used to generate new reports with the most up-to-date data available in Perspective. The Open Local button should only be used to quickly reference recently run reports.

Custom Reports

You have the ability to take queries that you've built in Analysis Expert and customize them into custom reports. You define what information goes into the report and how it looks.

Note: You need user permissions to access Custom Reports.

User Interface

The interface of the Custom Reports component evolves into separate screens depending on how far along you are in building your custom report – the initial **custom reports** window and the subsequent **reports designer** window. The reports designer window of the Custom Reports component is where you modify the appearance of your report, including changing the background, font colors and sizes, adding logos, etc. The initial custom reports window is divided into the following sections:

1. **Ribbon:** Contains the buttons that perform adding and execution of custom reports.

   Note: Right-click the listing pane to open a menu with the following options: Add, Edit, Share, Delete, Clone, and Execute your custom report.

2. **Listing pane:** Arranges custom reports that you create according to their access options (i.e., Shared Custom Reports or Private Custom Reports) and Custom Report category. By default, all new Custom Reports are Private Queries available only to the user who created them. In order to make a saved Custom Report available to users across your organization, you must share it. Refer to the "Share a Custom Report" chapter for more information on how to do this.

Custom Report Design Process

The following chapter involves working with Perspective's Report Designer. To understand how to use the Report Designer, please refer to the "Report Designer" section for details.

Create a Custom Report

1. Make sure the custom report category you want your created custom report to appear under is highlighted (i.e., Private Queries, Shared Queries).

2. To start a new custom report, choose one of the following options:

   - Click **Add** on the Ribbon.

   - Right-click in the listing pane, and select **Add** from the drop-down menu that appears.

3. A Create New Custom Report dialog box will open.

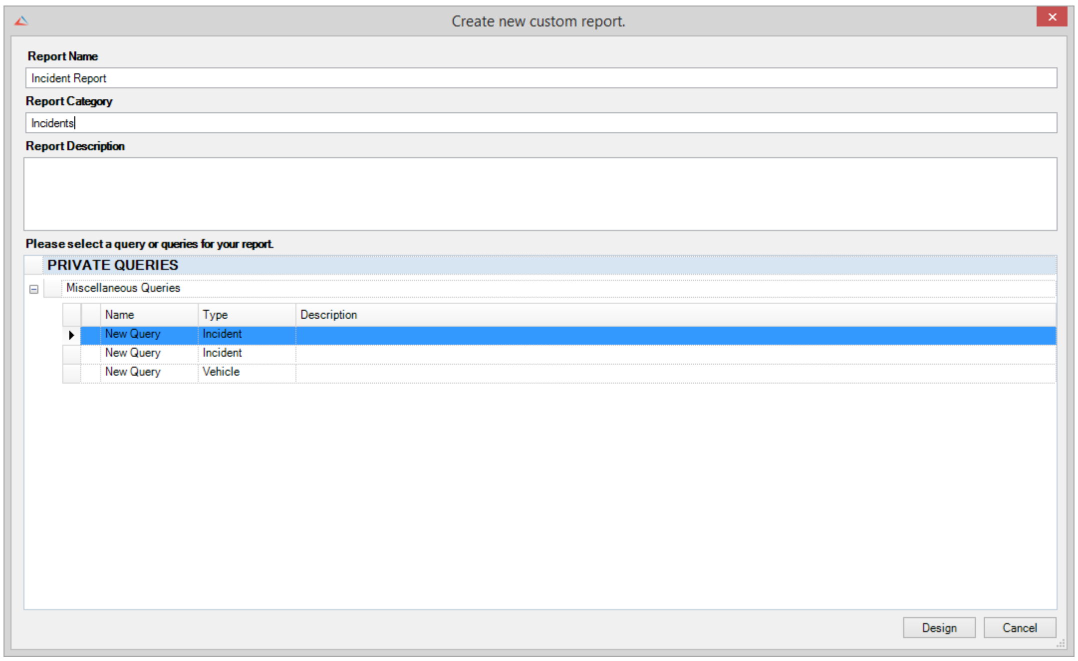
4. Enter a title for the custom report in the **Report Name** field.

   Note: Use specific names for your custom reports, because if same-named reports are shared, the user will only see the first query with that name.

5. Make sure the Report Category is correct. If you want to create a new Category, type it in this field.

6. In the **Report Description** text box, identify the type of custom report and/or its purpose.

   Note: The Report Description field can be left blank. The Report Name and Report Category fields must be filled in.



7. Click **Design**.

8. The new custom report entry will be added to the relevant record entry node. The Perspective Report Designer window will open (refer to the "Report Designer" section for details on how to use the Report Designer).

Save a Custom Report

1. Complete the design of your custom report.

2. Store the custom report for access at a later date by doing one of the following actions:

   - Click **Save** on the Ribbon.
   - Click **File**, and from the drop-down menu that appears, click **Save**.

Edit a Custom Report

1. Make sure the custom report you want to edit is highlighted.

2. To open and begin editing the custom report, choose one of the following options:

   - Click **Edit** on the Ribbon.

   - Right-click in the listing pane, and select **Edit** from the drop-down menu that appears.

3. The Custom Report dialog box will open.

   - You can change the custom report Name, Category, and/or Description.

4. Click the **Edit** button to open the custom report or the Cancel button if you have selected the wrong report.

5. Make the appropriate changes in the Custom Report Designer.

6. Store the custom report for access at a later date by clicking **Save** on the Ribbon, or click **File** and then **Save** from the drop-down menu that appears.

Clone a Custom Report

1. Make sure the custom report you want to clone is highlighted.

2. To clone the custom report, choose one of the following options:

   - Click **Clone** on the Ribbon.

   - Right-click in the listing pane, and select **Clone** from the drop-down menu that appears.

3. A prompt will appear, asking if you are sure you want to clone the custom report. Click the **Yes** button to clone the report, or No to cancel the cloning process.

Note: If you do not have Manage rights, you will be unable to clone or edit a custom report.

Share a Custom Report

1. Make sure the custom report you want to share is highlighted.

2. To share the custom report, choose one of the following options:

   - Click **Share** on the Ribbon.

   - Right-click in the listing pane, and select **Share** from the drop-down menu that appears.

3. The Share Custom Report dialog box will open.

4. Click the **Add User** or the **Add Role** button.

5. Select the user you want to share the custom report with by typing his/her name and/or role in the text field, or scrolling through all users and/or roles.

6. Double-click the user's name and/or role to confirm your selection.

   - Click the **Allow Manage** checkbox if you want the user or a particular role to have the ability to edit, share, delete, or clone the shared custom report.

7. Click **Save**.

   - Shared custom reports will have the **Share** icon displayed beside the title.

Delete a Custom Report

1. Make sure the custom report you want to delete is highlighted.

2. To delete the custom report, choose one of the following options:

   - Click **Delete** on the Ribbon.
   - Right-click in the listing pane, and select **Delete** from the drop-down menu that appears.

3. A prompt will appear, asking if you are sure you want to delete the custom report. Click the **Yes** button to delete the report, or No to cancel the deletion process.

Note: A custom report that has been shared to you by another user cannot be deleted.

Execute a Custom Report

1. Once your custom report is created, you may either run it immediately, or save it for further use, and then run it. To run a saved custom report, select the name of the report you want to run from the custom reports list in the listing pane.

2. To execute the query, choose one of the following options:

   - Click **Execute** on the Ribbon.
   - While in the Report Designer, click **File**, **Export** and from the menu that appears, select the file type you want the report to be run in.

Report Designer

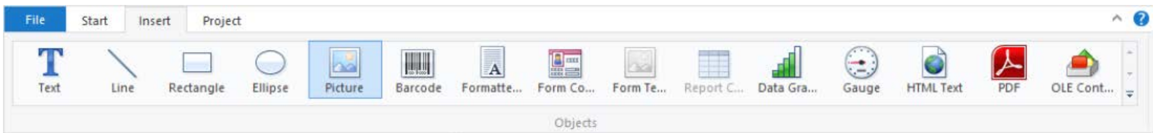
In the Report Designer, you have all your query data at your disposal and can prepare it for printing in different ways.

Getting Started

Insert a Company Logo into the Report

For the company logo, please use the "sunshine.gif" file, which you will find in the directory for the Sample Application. We also need a "Picture" object. Proceed as follows:

1. Click **Insert** > **Picture** (Objects > Insert > Picture).



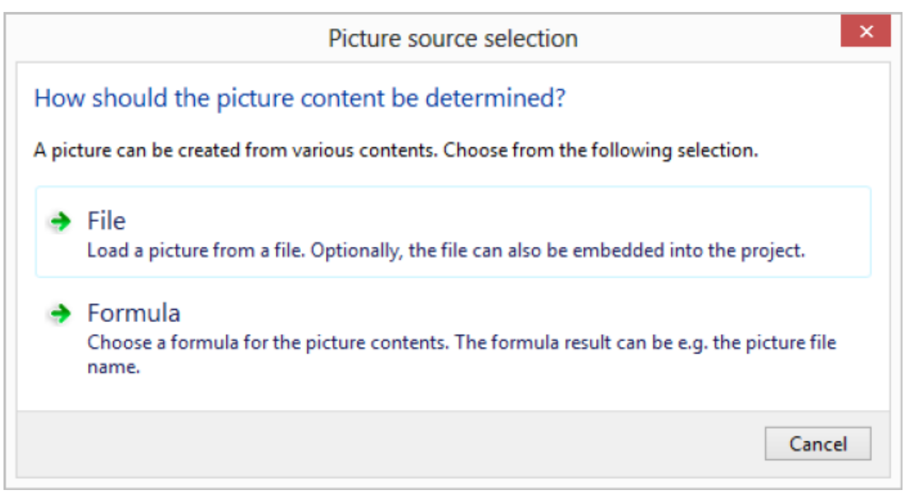
Note: Objects are your project's building blocks. They are generated in the workspace where they are also given a border with which their size and position can be changed. This border defines the space that the object takes up and thus also the maximum size to which the contents of the respective object can be expanded. Objects may overlap fully or partly.

2. In the workspace, point the mouse to the position where the upper left corner of the object is to begin. The mouse cursor changes to a crosshair. Hold down the left mouse button and drag the crosshair to the lower right corner of the planned object. Release the mouse button when the object (the dashed border) is the right size.

Note: Objects can be added to the workspace in different ways: via the menu Objects > Insert, via the toolbar or via keyboard shortcuts, or with Drag and Drop from the list of variables.

3. Select if the picture is loaded from a file or if the content is defined by a formula/variable.

Note: This dialog is not available in Windows XP, the file selection dialog will appear directly.

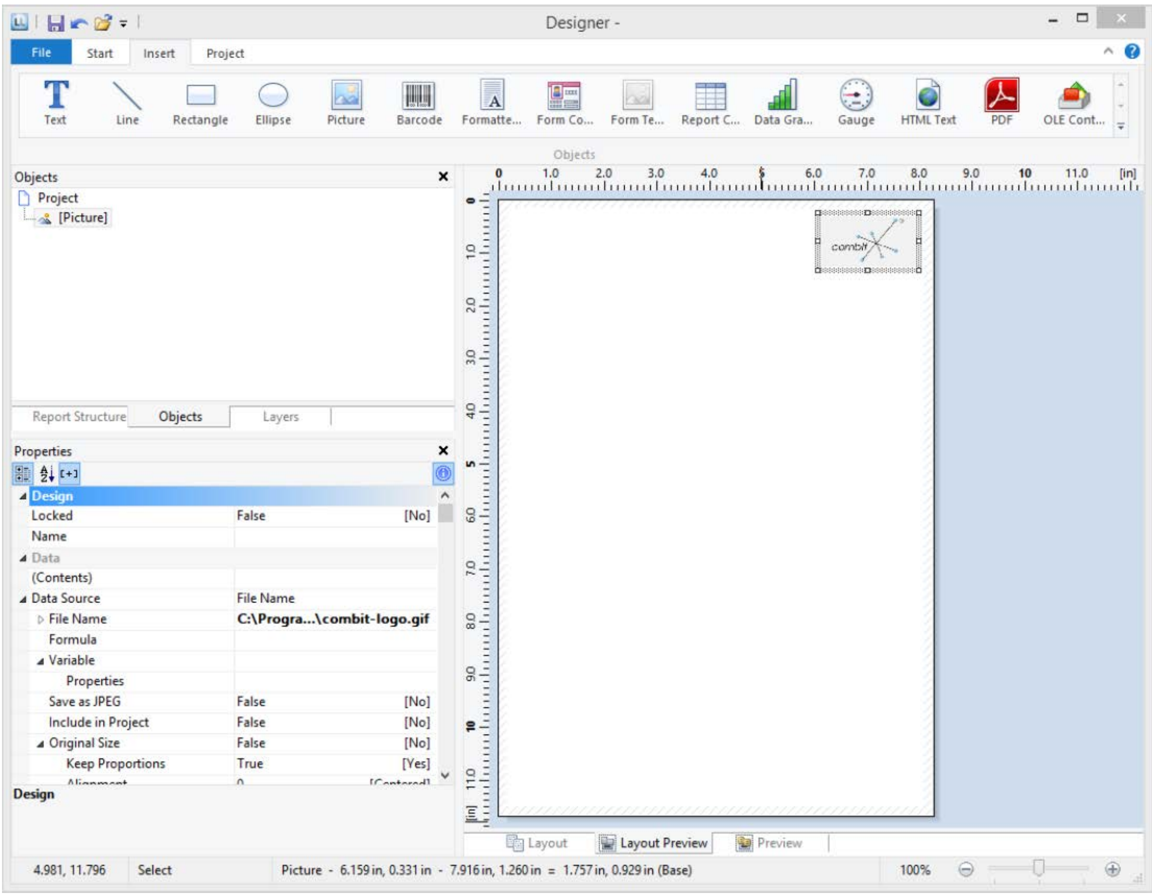


4. If you select **File**, a file selection dialog will appear. Select the image file.

Note: The following formats are available: LL, BMP, DOCX, HTML, JPG, PDF, PNG, RTF, SVG, TXT, TIFF, XLS, XLSX, XML, and XPX. As a general rule, you should use the RGB color space (not CYMK). Transparency in PNG files is supported by using the corresponding Windows functions. In our experience the majority of printer drivers do not support transparency so that reports with e.g., partly transparent PNG files should thoroughly be tested on the actual hard-software combination. If that is not possible we recommend doing without the alpha channel.

*Insert the picture into the project by enabling the "**Embed image in project file**" checkbox option.*

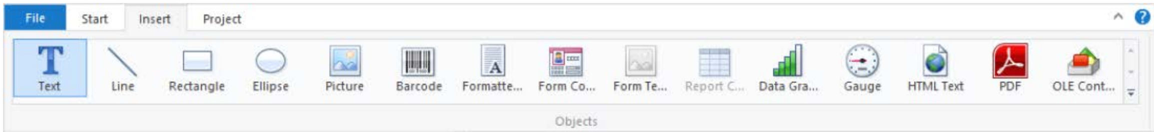
5. After you select the file, select the **Embed image in project file** checkbox, and click **Open**, the logo will be inserted into your report.



Add a Title to the Report

Use a text object to add a title to the report. Text objects let you place text in the workspace. As well as fixed text, you can also insert the contents of fields (variables) from the database (e.g., company name), or you can use functions (page number, date, etc.).

1. Click **Insert** > **Text** (Objects > Insert > Text).



2. In the workspace, hold down the left mouse button and pull the object to the required size. Text objects should always be created in the maximum size you want, the object shrinks at print time to the required size.

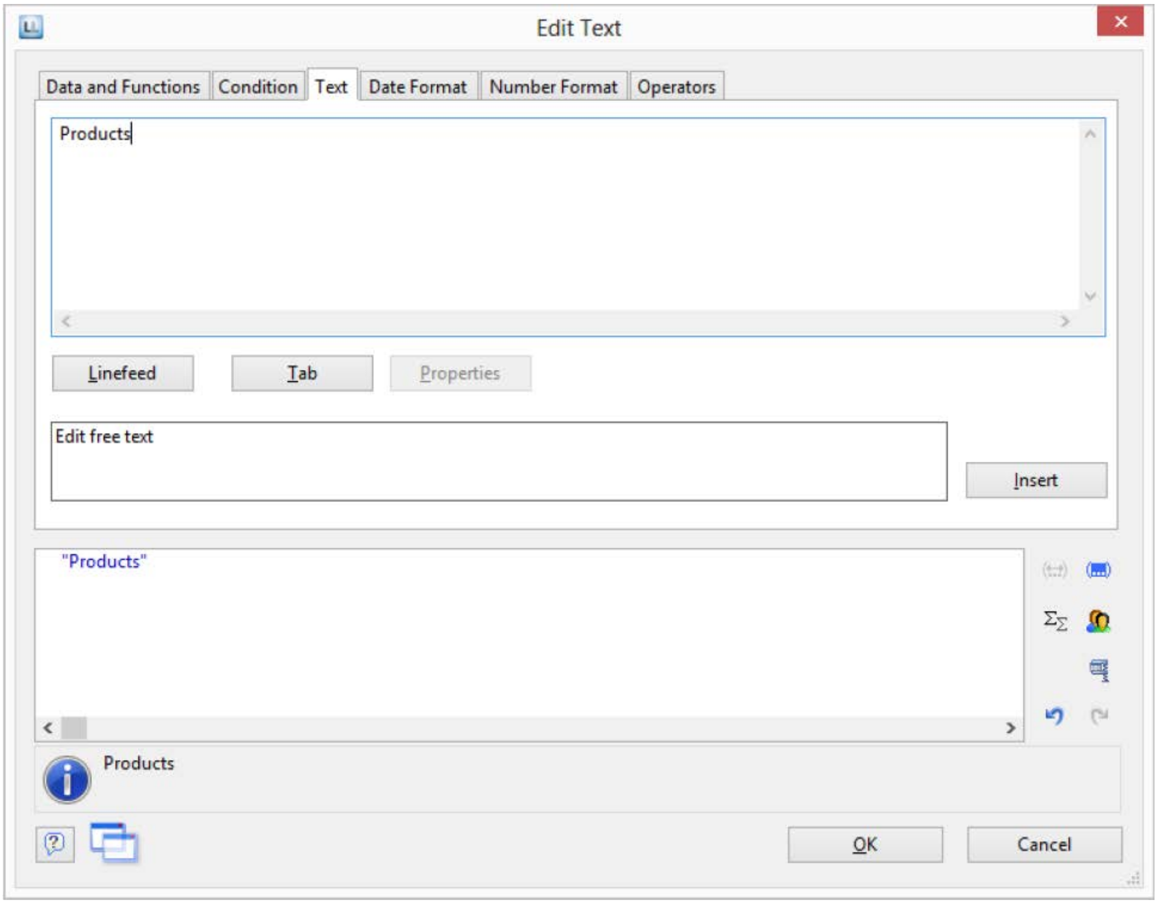
3. The formula wizard will now appear which you can use to define the contents of the text object.

   This dialog consists of a series of tabs each containing different elements to be edited. The following chapters explain the meanings of these elements in more detail.

   - **Data and Functions**: the available variables, fields, and functions.
   - **Condition**: for defining IF-THEN-ELSE conditions.
   - **Text**: for entering fixed text and tabs.
   - **Date Format**: different date formats.
   - **Number Format**: different number formats.
   - **Operators**: available conjunction operators.

   You can also enter the expression that you want directly in the edit box or modify the text that is there (e.g., put something in brackets).

   Therefore, enter our title "Products" directly. Fixed text must be enclosed in quotation marks. Enter names of data and functions without brackets.

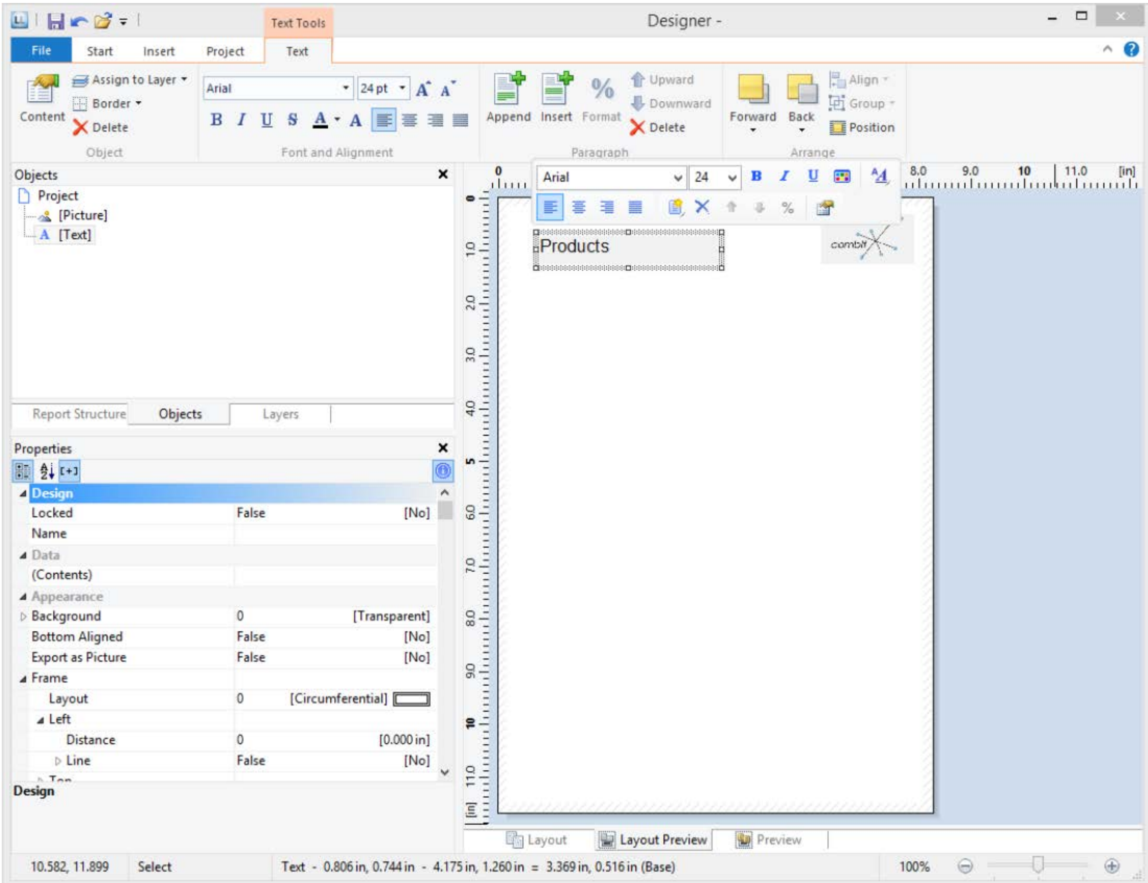


Note: Please note that there are two ways of writing expressions, depending on their use. You will find more information about this in the chapter "Variables, Fields and Expressions".

4. The title will be displayed when you close the dialog with OK.

5. Use the tab **Texttools** > **Text** (mini-toolbar) to enlarge the font size.

6. You have now added the title:

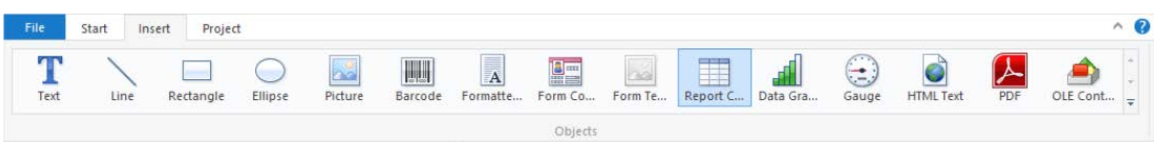


Insert the Table for the Product List

Use the "Report Container" object to add a table to the report. As the name says, a report container can hold several objects: tables, charts and crosstabs can be added in any order.

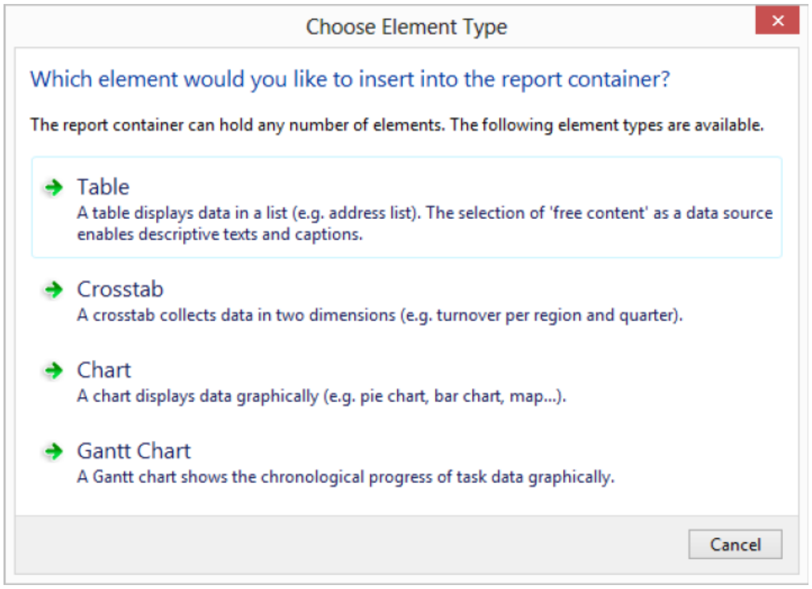
Note: The report container is not available in all applications. In applications that don't have the report container, use the "Table" object.

1. Click **Insert** > **Report Container** (Objects > Insert > Report Container).

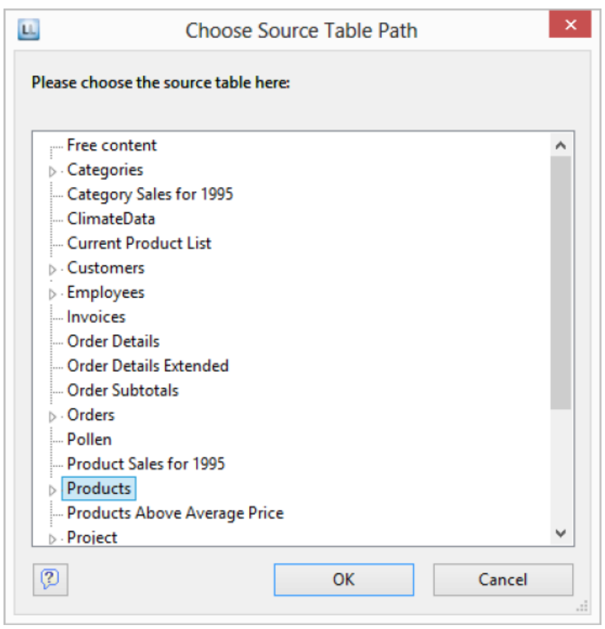


2. In the workspace, hold down the left mouse button and pull the object to the required size.

3. A selection dialog will appear for the chosen element type. Choose the "**Table**" element type.

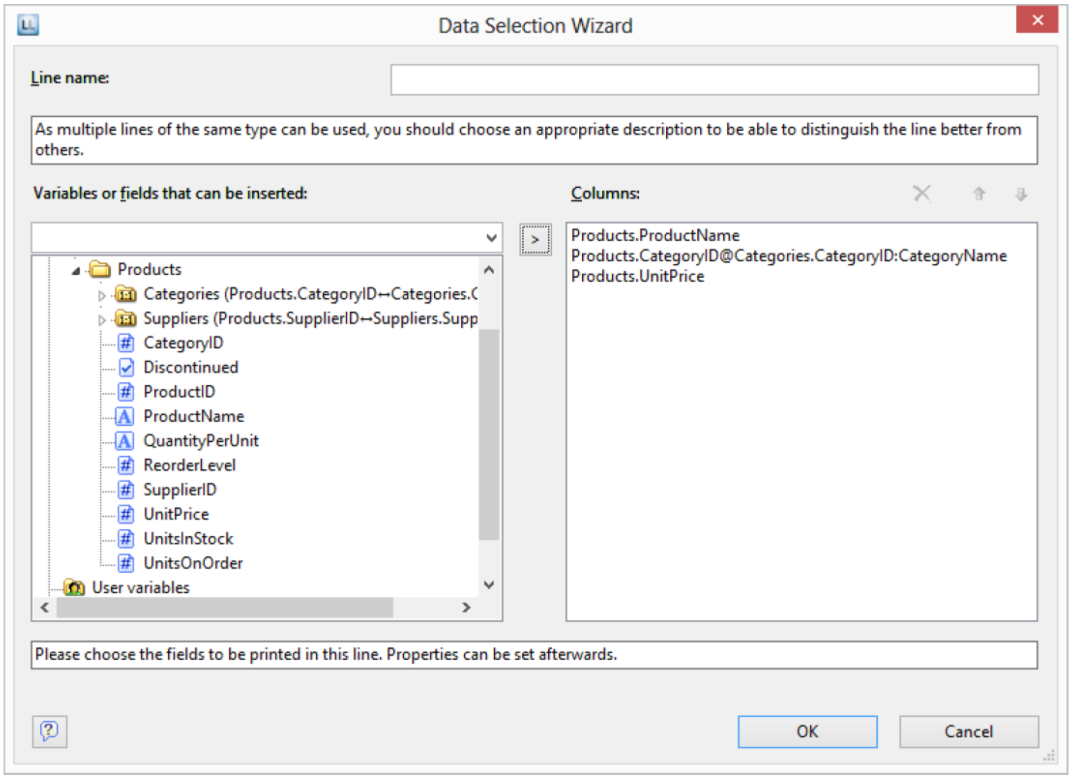


4. Now supply the data source in the following dialog. All available tables are shown hierarchically; in other words, under the tables, you will find the relational tables in each case.



Select the "**Products**" table because it contains the fields that we want for our product list.

5. A selection wizard will appear with all the fields in the "Products" table. In addition, underneath the "Products" table, you will also find the fields in the tables "Categories" and "Suppliers" which have a 1:1.relationship with "Products".



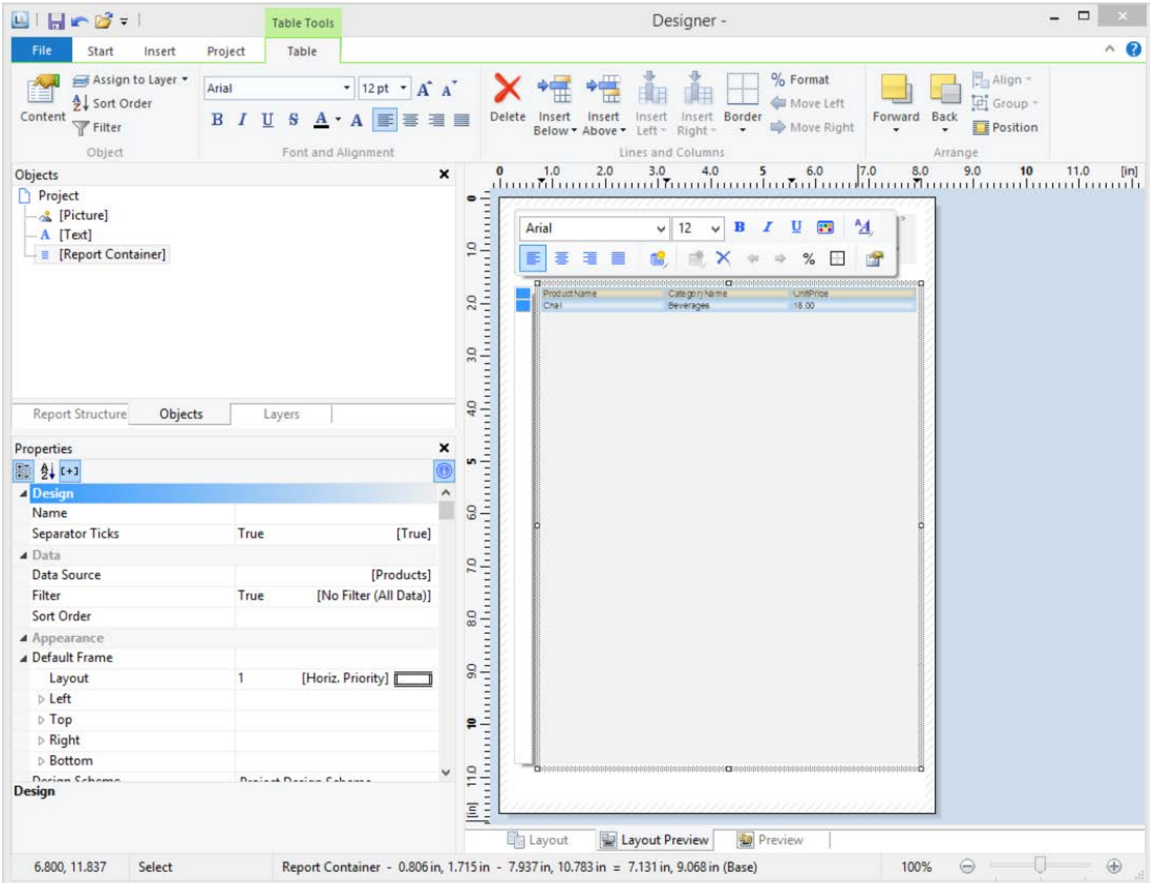
In this dialog, now choose the columns for the table. Double-click a field, e.g., "**ProductName**". The field will be added to the "Columns" area.

6. Repeat this step for all fields that are to be shown in the table; i.e., also the "**CategoryName**" field from the linked table "**Categories**" and the "**UnitPrice**" field for the unit price. Confirm your selection by clicking **OK**.

7. The table will now be displayed in the workspace.

   - The selected fields are displayed in the data line, in other words, the data line contains the data.
   - In addition, a header line is automatically produced. Header lines are used mostly as column titles, i.e., the selected field names are now shown here as text.
   - If you pull the report container widthwise to make it wider or narrower while holding down the CTRL key, the columns will be adjusted proportionally to fit.
   - The width of the columns adjusts automatically. You can adjust the width of a column manually by moving the separating line to the right or the left with the mouse.

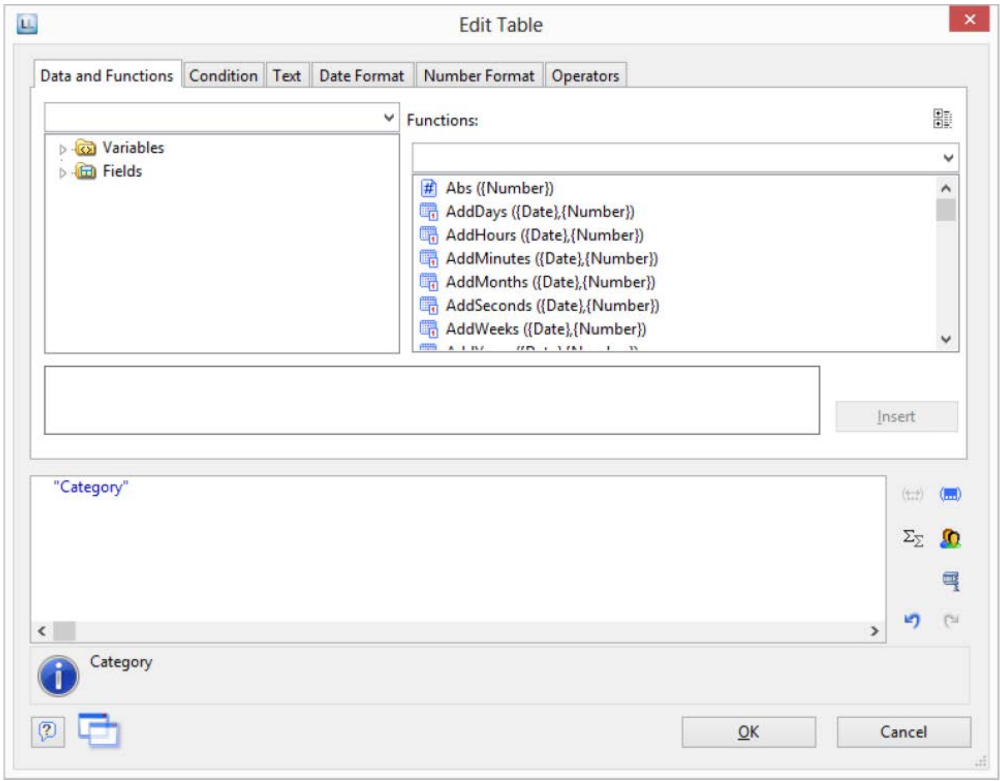
Note: This changes all table columns, whose separators are within +/-2 mm from the mouse position. If you hold down the CTRL key, the action will only be carried out for the line on which the mouse is positioned. If the "Column width modification affects next column" option is enabled (File > Options > Workspace), you can alter the column width while making the next column smaller.



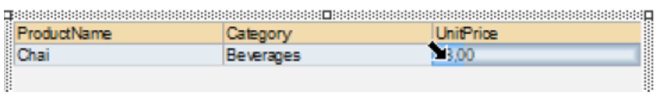
Format Table Fields

Only a few basic formatting options are explained here.

1. In the product category column title, the field name "CategoryName" is shown. Click the respective field in order to change this text to "Category". The formula wizard will now appear, which you can use to change the contents of the field. Text must be enclosed in quotation marks.

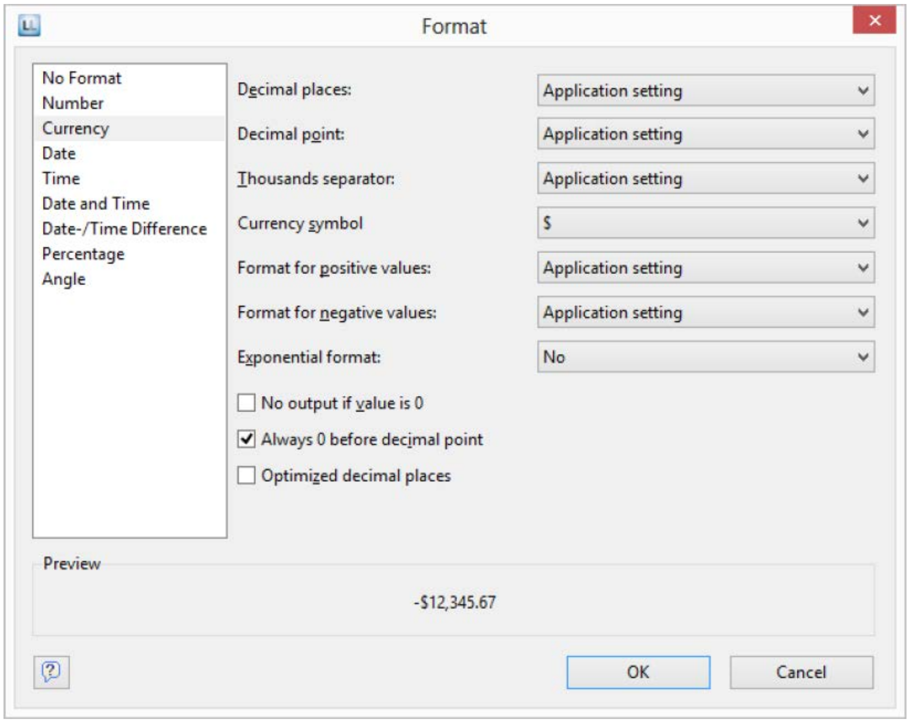


2. In addition, we want to format the unit price as currency and align the entire column to the right. You will find both formatting options in the tab **Table Tools** > **Table** (mini-toolbar). Click in the upper left corner to select the field containing the unit price.

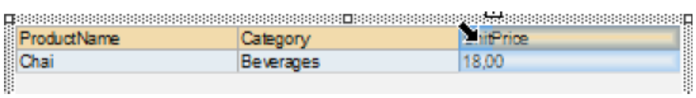


3. Click the button "**% Format**" for the formatting dialog

4. A selection dialog will now appear in which you can select the formatting that you want for the numeric field. To do this, choose the type on the left hand side i.e., "**Currency**". In the right pane, you can specify the currency formatting in detail. The settings for the relevant application will be used in each case as standard. Alternatively, you can choose the system setting or a user defined setting.



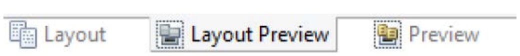
5. Finally, select both fields (the header and the data line) to align them to the right. To do this, hold down the **CTRL** key and select both fields by clicking in the upper left corner in each case. Then click the button for right alignment.



Display a Preview of the Report

Until now, you have only seen the report in layout view as a structure with a record. To get an impression of the result, you can display a preview of the report. Use the tabs in the bottom margin of the workspace to change to the preview.

Note: Real data preview mode is not supported by all applications.



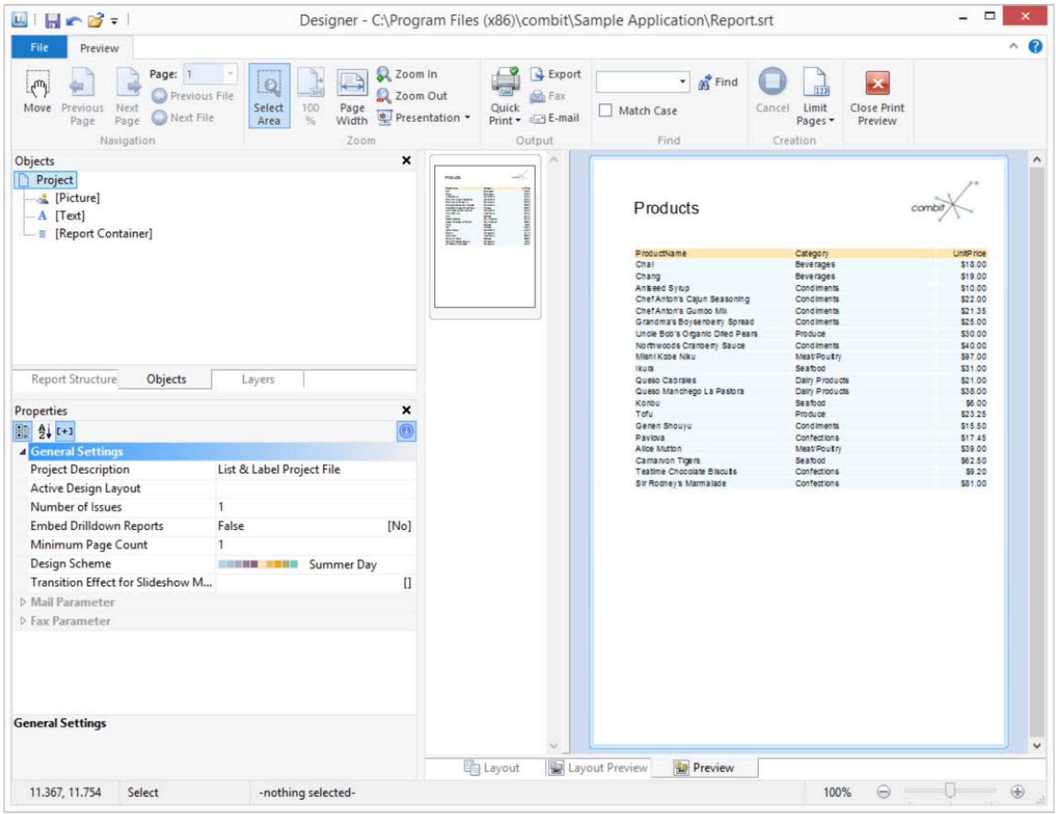
The report will now be displayed with the data from the "Products" table. You can also change the number of "products" or data records in the Sample Application.

1. To do this, save the report with **File** > **Save**.

2. End the Designer with **File** > **Close**.

3. In the Sample Application, choose **Options** > **Settings**, and increase the maximum number of root records to 50.

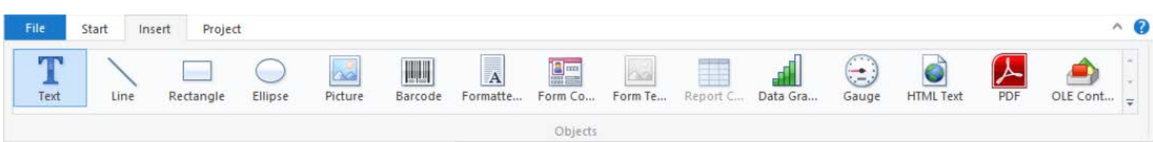
4. Open the print template that you created again via Design > Extended Samples, and switch to preview mode. Your report will look roughly like this:



Add a Page Number

It's a good idea to add a page number in the lower area of the page. To do this, add a new text object. You will be using functions (such as the page number function) as well as fixed text with this object.

1. Choose Insert > Text (Objects > Insert > Text).



2. In the workspace, hold down the left mouse button and pull the object to the required size.

3. The formula wizard will now appear which you can use to define the contents of the text object. The available functions are shown in the right pane. You can use an auto filter with this list. Type "page" in the filter field. This will cause all functions containing the expression "page" to be displayed.

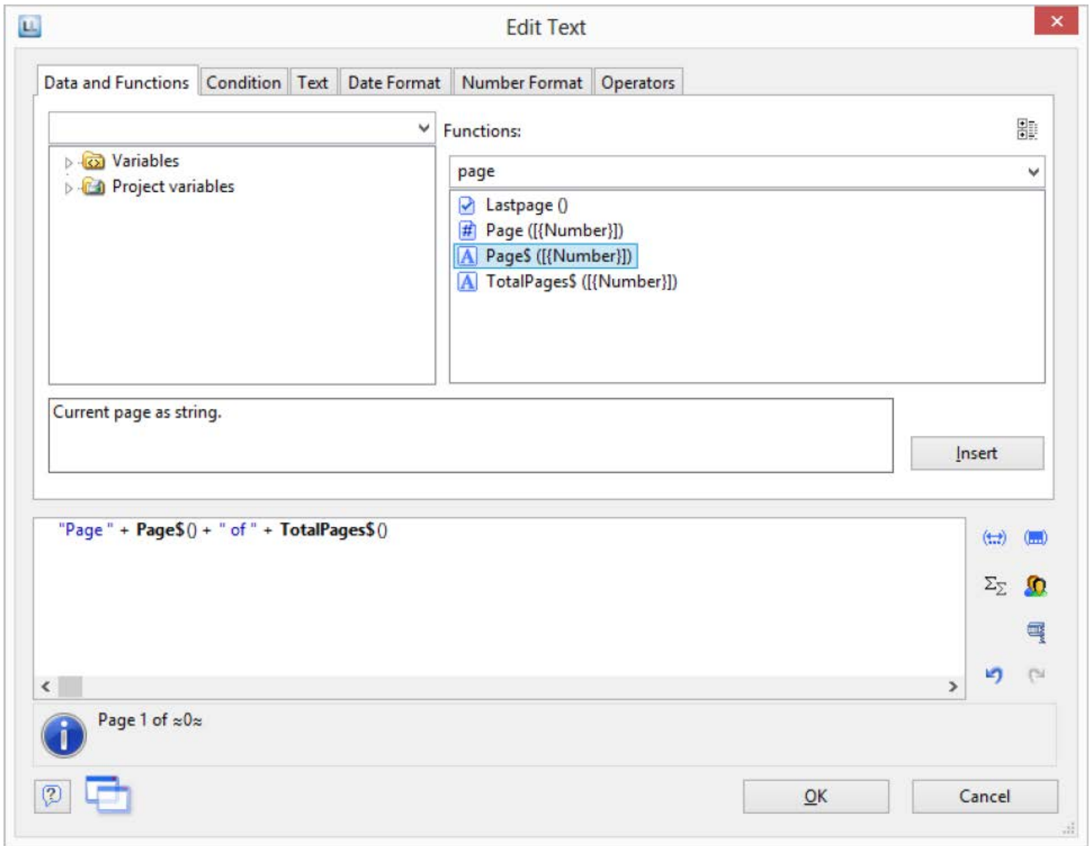
   - The "Page$ ()" function returns the page number.

- The "TotalPage$ ()" function returns the total number of pages.

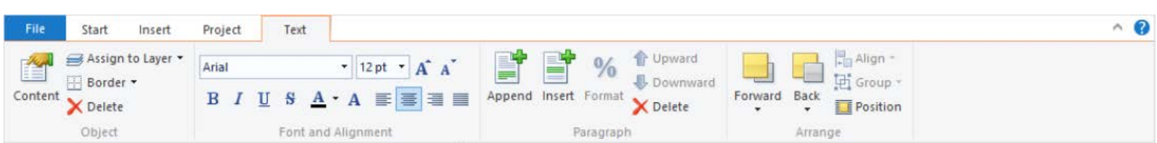
Add the "Page$ ()" function to the result area by double-clicking.

4. If you now want to output a footer in the form of "Page 1 of 2", you can enter the text "of" directly in the usual way. Please consider that individual parts must be joined with a "+" and that text must be enclosed in quotation marks.

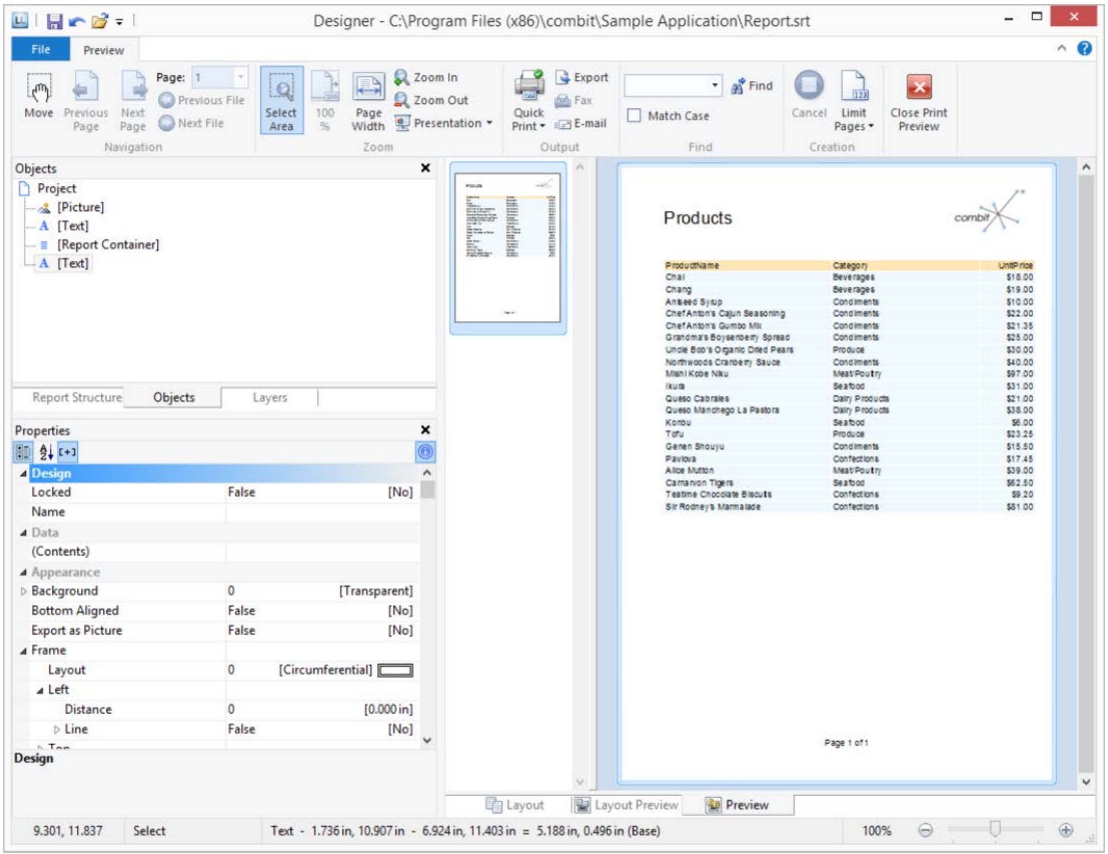
5. Now add the "TotalPages$ ()" function by double-clicking to get the total number pages. The formula will look like this:



6. You can center this line in the report in the usual way:



7. Switch to preview mode to view the result:



General Procedures

Choose a Page Layout

The first task in a new project is to set up the page layout that you want. Click **Project** > **Layout Regions** (Project > Page Layout) to specify properties such the choice of printer, paper size, and orientation.

If multiple layout areas are defined, the active workspace can be selected via the "Active Design Layout" project property.

Zoom

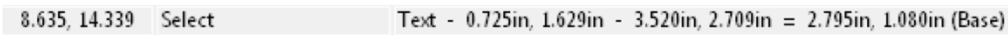
It is possible to zoom in on the workspace. Use "Zoom In", "Zoom Out", and "100%" to adjust the view in the workspace. Use the Zoom slider in the status bar to slide to the zoom percentage you requires (50% - 500%).

Use "Select Area" to select the view area with the left mouse button. Click **Start**> **Select Area** (objects toolbar > Select).

Status Line

The status line is divided in three sections.

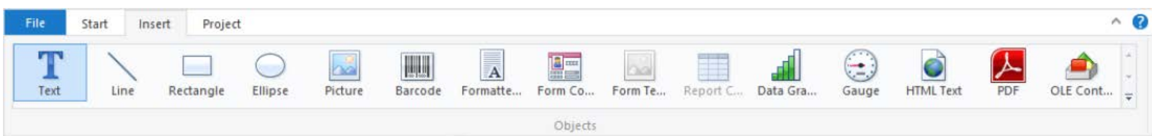
- The current mouse position from upper left.
- The active operation (e.g., selection).
- Name, position upper left, position lower right, width, height, and layer of the selected object.
- Zoom slider for Workspace and Preview.



Ribbon

The Ribbon contains command buttons on different tabs. The commands are arranged according to how often they are used. Frequently used commands are available prominently; less frequently used commands are located on less prominently.

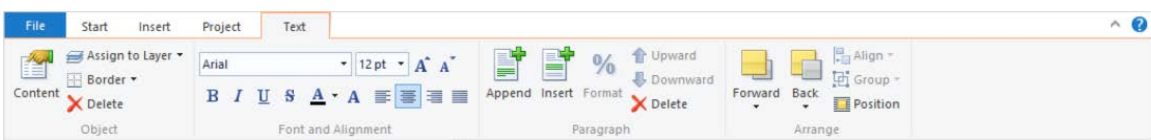
Note: Alternatively, you can work with a classic menu and toolbars. Select the type of display in the project options (Project> Options> Workspace).



Some other commands are displayed only when you might need them, in response to an action.

Text Tools

If you insert a text object, the Text Tools and the tab "Text" are displayed. The tab contains the commands you need for working with text objects. When you have finished the work on the text object, the Text Tools are hidden.

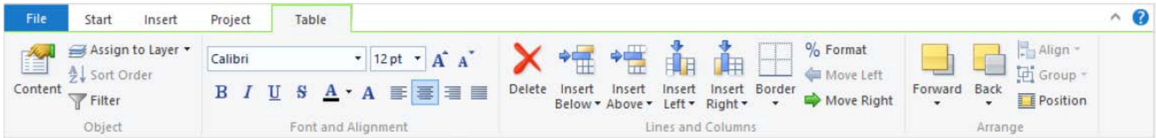


With the Text Tools you can append/insert a paragraph, move paragraphs upwards/downwards, apply fonts, font sizes, text colors and formatting as well as arrange objects.

- To select a complete paragraph, click onto the bar on the left. Hold CTRL or SHIFT to select multiple paragraphs or a complete range.

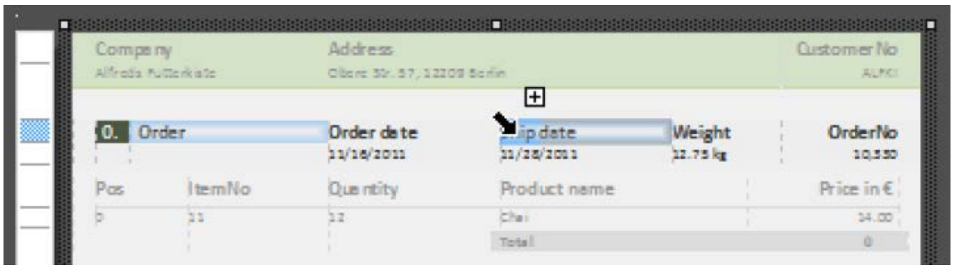
Table Tools

If you insert a table, the Table Tools and the tab "Table" are displayed. The tab contains the commands you need for working with table objects. When you have finished the work on the text object, the Table Tools are hidden.

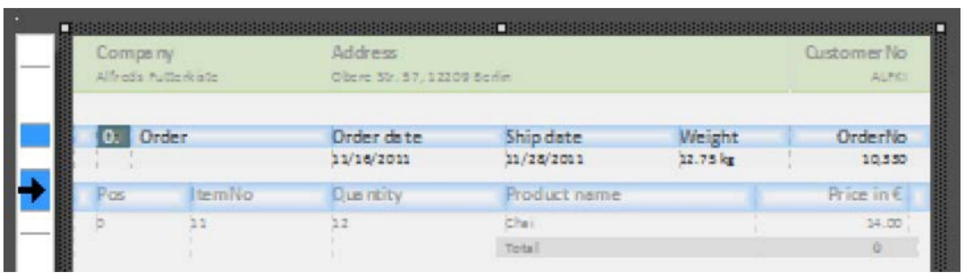


With the Table Tools you can define a new line, insert a new row, move selected rows/cells to the left/right, borders, apply fonts, font sizes, text colors, and formatting, as well as arrange objects.

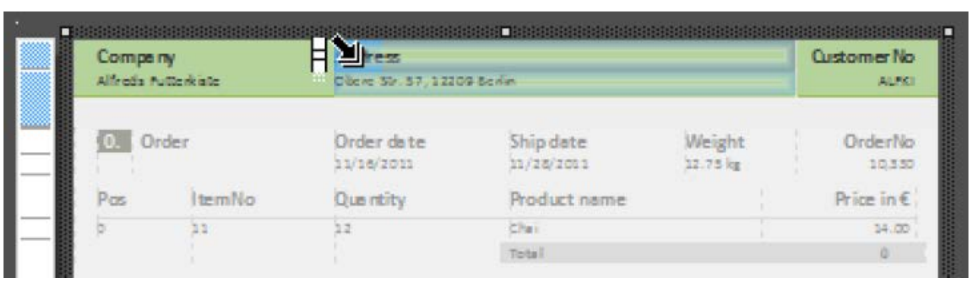
- To select a field, click in the top left corner of the field. Hold CTRL or SHIFT to select multiple fields or a complete range.



- To select a complete line, click onto the bar on the left. Hold CTRL or SHIFT to select multiple paragraphs or a complete range.

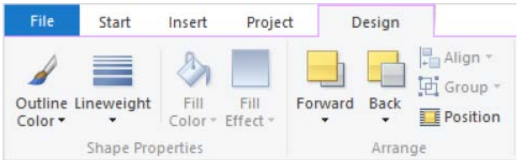


- To select a complete column, hold ALT. Hold CTRL or SHIFT to select multiple columns or a complete range.



Drawing Tools

If you insert a drawing object, the Drawing Tools and the tab "Design" are displayed. The tab contains the commands you need for working with drawing objects (e.g., Outline color, Lineweight).



Minimize the Ribbon

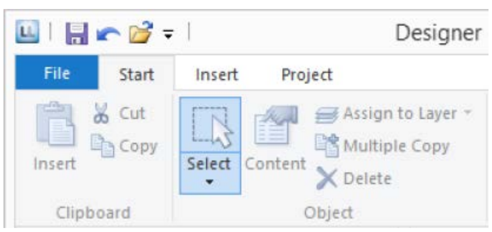
The ribbon can be minimized in order to save screen space.

- Right-click the ribbon, and then click Minimize the Ribbon.
- To quickly minimize the ribbon, double-click the name of the active tab. Double-click a tab again to restore the ribbon.
- To minimize or restore the ribbon via Keyboard shortcut press CTRL+F1.

To use the ribbon while it is minimized, click the tab you want to use, and then click the option or command you want to use.

File Menu

The File menu contains commands for saving, printing, exporting the project, and the project options.



Quick Access Toolbar

The Quick Access Toolbar is a customizable toolbar that contains a set of commands that are independent of the tab on the ribbon that is currently displayed. You can move the Quick Access Toolbar from one of the two possible locations, and you can add buttons that represent commands to the Quick Access Toolbar.

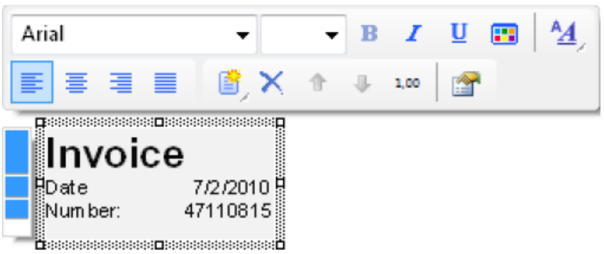
On the ribbon, click the appropriate tab or group to display the command that you want to add to the Quick Access Toolbar. Right-click the command, and then click "Add to Quick Access Toolbar" on the shortcut menu. In order to delete a command, right-click the command you want to remove from the Quick Access Toolbar, and then click "Remove from Quick Access Toolbar" on the shortcut menu.

Mini-toolbar

When you select a text object or a table object, a convenient toolbar in miniature format is displayed, the mini-toolbar.

Note: The Mini toolbar is especially useful if you use the classic menu and toolbars instead of the ribbon. You can select the type of display in the project options (Project> Options> Workspace). When using the ribbon, the functions of the mini-toolbar will be displayed in the tabs "Text Tools" and "Table Tools".

- With the mini-toolbar you can add a text paragraph, define a new table line, insert a new table row, apply fonts, font sizes, orientations, text colors and formatting as well as open the object dialog.
- You can close the mini-toolbar by pressing ESC. With the project option "Show mini-toolbar" (File > Options > Workspace) it can be suppressed permanently.



Default Settings for Font and Frame

Click **File** > **Options** > **Objects**.

The "Select" button under "Object font" lets you choose the default font to be used for objects. Under "Color preferences", you can specify the border and the filling for objects.

New objects will be created according to these settings. However, you can change the settings later individually for each object.

When you start a new project, it's a good idea to configure these settings using suitable values to keep the effort required for making manual changes to a minimum. The settings only apply for the current project.

The "Default" parameter in the respective object properties (Font/Frame/Background) is active as standard for all objects. Therefore, if the default values are changed later, this will also affect all objects whose font has not been changed manually.

Create a Professional Table

In this chapter, we will extend the previous examples to include more functions, output grouped data, use appearance conditions and layers to allow multiple pages to be output and add more elements to the report container.

Use Advanced Features with the Report Structure

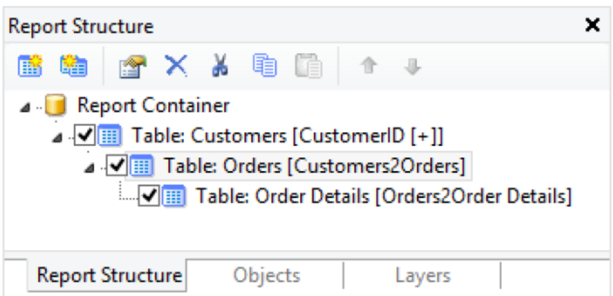
You use the "Report Container" object to add a table. As the name says, a report container can hold several objects.

Tables, charts, crosstabs and Gantt charts can be added in any order, even as sub-elements of tables. This lets you define sub-reports with almost any relationships between tables.

However, only one report container is permitted and you cannot define any separate tables, charts, crosstabs or Gantt charts.

You define new elements in the "Report Structure" tool window along with the hierarchical structure that you want. All elements and respective sub-elements of a report structure are shown here, with object type and data source [relation name, sort name], in the order in which they will later be printed (sequence plan).

The currently selected item will be highlighted in the workspace. By using the checkboxes in the tool window "Report Structure", you can toggle the visibility of elements, sub elements and branches.



All actions are available in a context menu. There are additional buttons in the top toolbar for the frequently used actions.

To add a new element to the report container, select the "Append an element" or the "Append a sub-element" button. Sub-elements are only possible with tables.

Only one element is displayed at any time in the workspace. This means that with the "Report Structure" toolbar, you select the element that you want to be displayed in the workspace.

Practise: Define the Report Structure Correctly

Let's assume that you want to produce a list of all customers, showing the orders of the respective customers and all order items.

You want the result to look roughly like this:

Order Overview

Customer orders

Company	Address	CustomerNo
Alfreds Futterkiste	Obere Str. 57, 12209 Berlin	ALFKI

1. Order	Order date	Ship date	Weight	OrderNo
	25.09.2012	03.10.2012	29.46 kg	10643

Pos	Item No	Quantity	Product name	Price in €
1	28	15	Rössle Sauerkraut	45,60
2	39	21	Chartreuse verte	18,00
			Total	63,60

2. Order	Order date	Ship date	Weight	OrderNo
	03.11.2012	13.11.2012	61.02 kg	10692

Pos	Item No	Quantity	Product name	Price in €
1	63	20	Vegie-spread	43,90
			Total	43,90

Total of orders	107,50

Company	Address	CustomerNo
Ana Trujillo Emparedados y helados	Avda. de la Constitución 2222, 05021 México D.F.	ANATR

1. Order	Order date	Ship date	Weight	OrderNo
	19.10.2011	25.10.2011	1.61 kg	10308

Pos	Item No	Quantity	Product name	Price in €
1	69	1	Gudbrandsdalsost	28,80
2	70	5	Outback Lager	12,00
			Total	40,80

2. Order	Order date	Ship date	Weight	OrderNo
	08.09.2012	14.09.2012	43.90 kg	10625

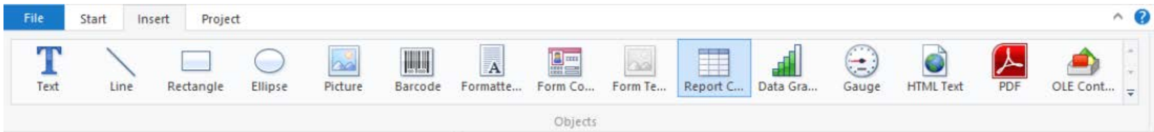
Pos	Item No	Quantity	Product name	Price in €
1	14	3	Tofu	23,25
2	42	5	Singaporean Hokkien Fried Mee	14,00
			Total	37,25

Total of orders	78,05

Total of all customers	185,55

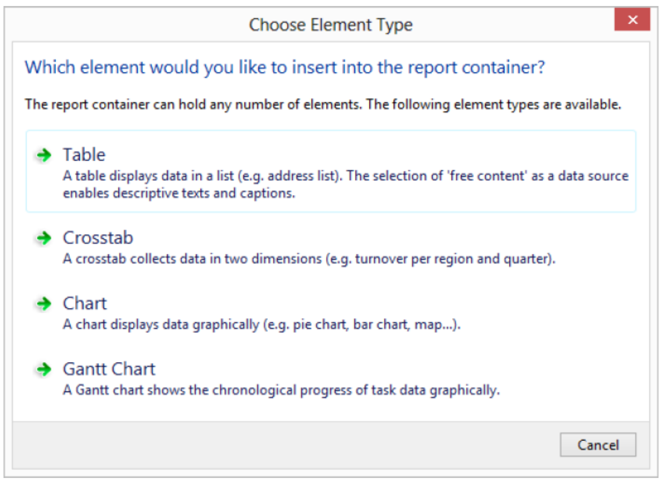
To achieve this, proceed as follows:

1. Click **Insert** > **Report Container** (Objects > Insert > Report Container).

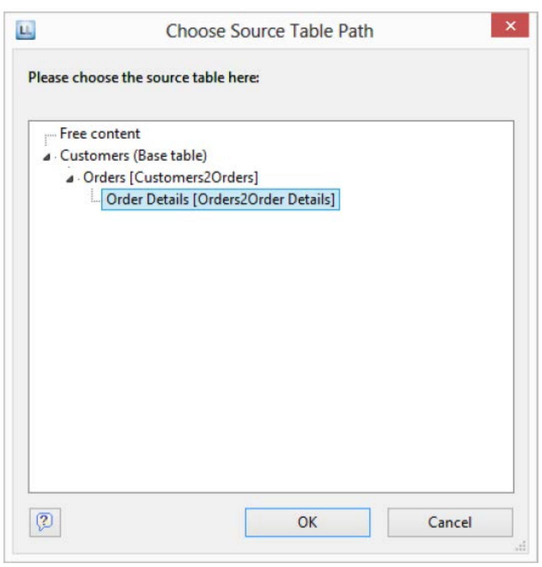


2. In the workspace, hold down the left mouse button and pull the object to the required size.

3. A selection dialog will appear for the chosen element type. Choose the "Table" element type.



4. You specify the data source in the following dialog. All available tables are shown hierarchically, in other words, under the tables, you will find the relational tables in each case.



For the list of invoices, you need the following structure: Customers > Orders > Order_Details.

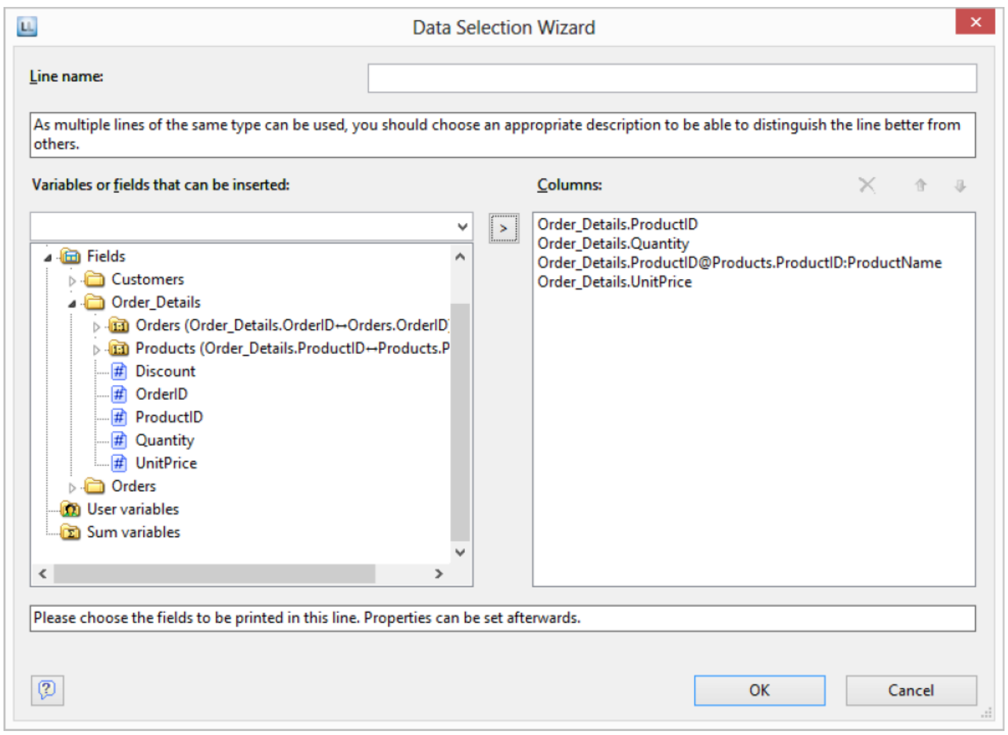
You have two alternative procedures at this point:

a. You select the "Customers" table to first create the "top" table. This corresponds to a top-down procedure; meaning that you then add the "Orders" sub-table followed by the "Order details" sub-table by means of the "Report Structure" tool window.

b. Or you choose the structure that you want right from the start by selecting the "lowest" table. This corresponds to a bottom-up procedure, meaning that you create all three tables starting by designing the "lowest" table.

5. You will be using the second method in this example. Accordingly, you select the table "Customers > Orders > Order_Details".

6. A selection wizard will appear with all the fields in the "Order_Details" table.



In this dialog, now choose the columns for this sub-table. For example, double-click the "ProductID", "Quantity", "UnitPrice" and "ProductName" fields from the "Products" table which has a 1:1 relationship. This will add the fields to the "Columns" area. You can change the order with the arrow button.

7. All tables will now be displayed in the workspace, the currently selected item "Order_Details" will be highlighted in the workspace.

- The selected fields are displayed in the data line, in other words, the data line contains the data.

- In addition, a header line is automatically produced. Header lines are used mostly as column titles, i.e., the selected field names are now shown here as text.
- The width of the columns adjusts automatically. You can adjust the width of a column manually by moving the separating line to the right or the left with the mouse.

Note: This changes all table columns whose separators are within +/-2 mm from the mouse position. If you hold down the CTRL key, the action will only be carried out for the line on which the mouse is positioned. The "Column width modification affects next column" option lets you alter the column width while making the next column smaller.

8. To define the columns of the "Orders" table, double-click the table in the "Report Structure" tool window.

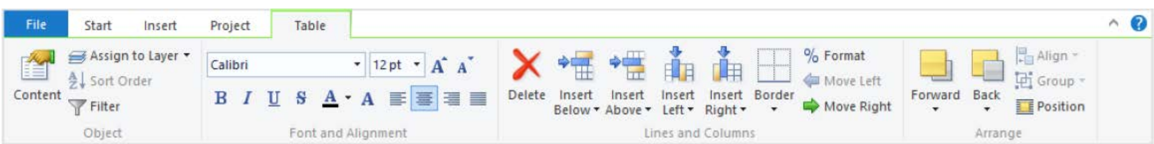
Modify Fields and Columns

There are two possibilities for adding additional columns to tables or for editing and formatting them in detail.

Table Tools and Mini-toolbar

If you insert a table, the Table Tools and the tab "Table" are displayed. The tab contains the commands you need for working with table objects. When you have finished the work on the text object, the Table Tools are hidden.

Optionally, you can activate a mini-toolbar for the tabel-objects (File > Options > Workspace).

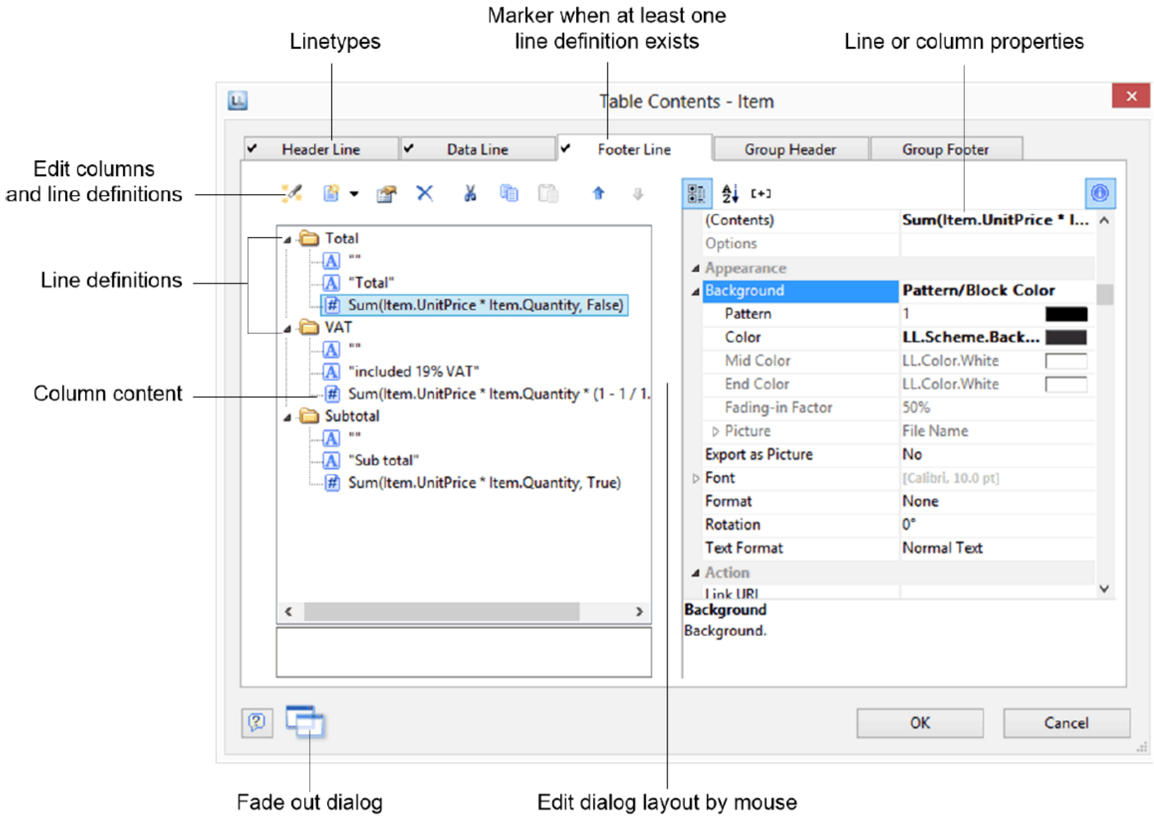


With the Table Tools you can define a new line, insert a new row, move selected rows/cells to the left/right, borders, apply fonts, font sizes, text colors and formatting as well as arrange objects.

- To select a field, click in the top left corner of the field. Hold CTRL or SHIFT to select multiple fields or a complete range.
- To select a complete line, click onto the bar on the left. Hold CTRL or SHIFT to select multiple paragraphs or a complete range.
- To select a complete column, hold ALT. Hold CTRL or SHIFT to select multiple columns or a complete range.

Object Dialog

Use the object dialog for more advanced functionalities. You open this dialog via the corresponding button in the mini-toolbar or by double-clicking the element in the report structure.



There is a tab for each type of line where you can specify the different definitions and columns for the respective line. The following types of line are available: header line, data line, footer line, group header, group footer. A checkmark on the tab indicates that a line type has one or more line definitions.

- Header lines are mostly used as titles for the columns of the table.
- Data lines contain the formatting for the actual table rows and the data that is to be shown in the table.
- Footer lines are displayed at the very end of the table and can hold final information about the data lines that are output above.
- Group header and footer lines are used to structure the data lines by means of "Intermediate headings" and "Intermediate footers".

All line types can be defined independently of one another.

- This means that the columns of a header line can have a different appearance as the data lines or footers that follow.

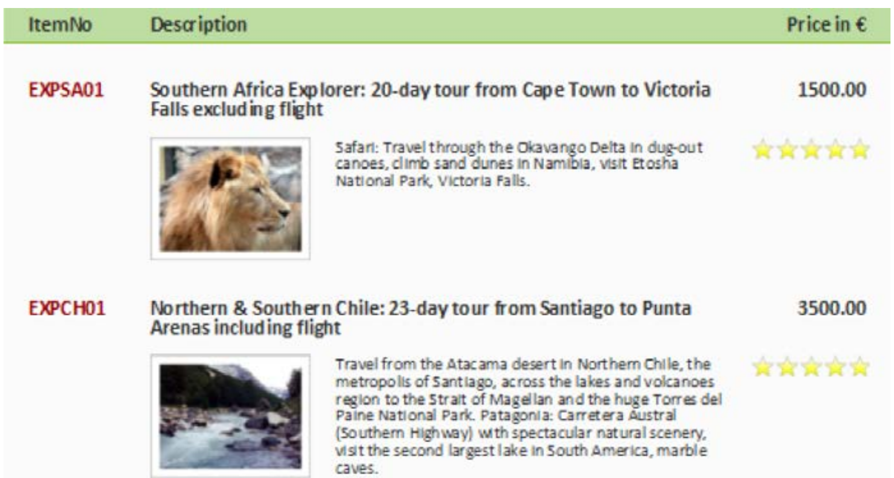
- You can also create different line layouts or line definitions for the individual line types. It is then possible to activate the different line definitions with special appearance conditions as required.

Variables-/Field-List, and Drag and Drop

The Variables-/Field-List (Project > Variables/Fields) shows all available variables and fields of the current project. To add more columns to existing rows you can simply drag the desired fields from the list onto the corresponding position with the mouse (drag and drop). The field can be inserted to the left or right of the corresponding column, a symbol shows the insert position. The column (standard width 30mm) will be inserted in the corresponding row. Please note that columns could be created in the non-visible area.

Define Multiple Line Layouts

You can define different layouts for each type of line. Depending on the appearance conditions, the appropriate layout is used in each case according to the situation. For example, you can output two table lines for each data record in this way:



Proceed as follows to create table lines in the object dialog.

1. First select the line type that you want to edit by clicking the relevant tab, e.g., Data Line.

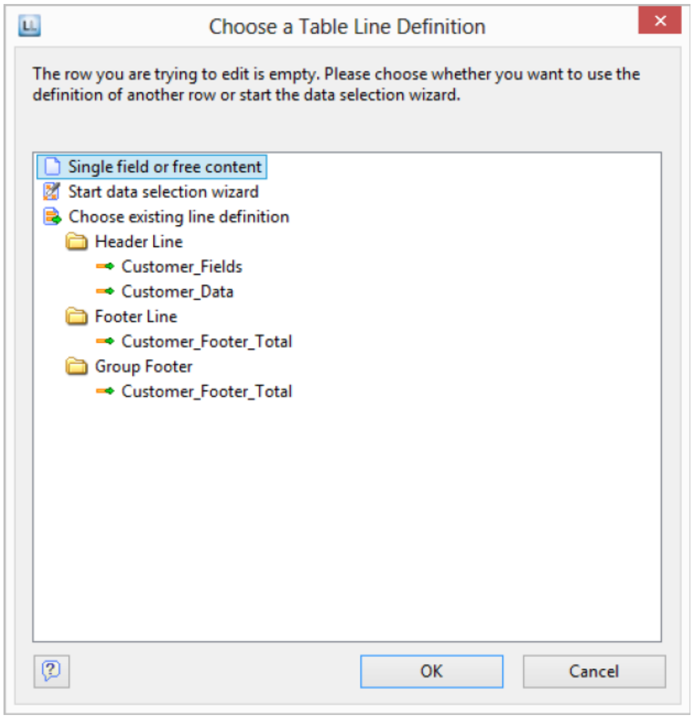
2. Now choose "Insert Table Line" in the context menu. Alternatively, you can select an existing Line definition and then click the "New (Append line definition)" button.

3. In the "Choose a Table Line Definition" dialog that follows, you have the option of:

   - using an already existing layout as a template for the new line definition (very useful if the layout is similar).

   - starting the data selection wizard (very useful if you want to create several columns in one operation)

- or creating an empty line definition so that you can then add the columns by means of the object dialog.



4. You have now created the new line. Edit the columns as described in "Defining Column Contents ". Change the order of the line with the arrow button or with Drag & Drop.

5. You can then specify the appearance of the new line as a whole. Various properties are available for this including:

- "Appearance Condition" with which you can specify when the line is to be printed. This is useful if you define multiple line layouts that are to be printed depending on certain values. The familiar dialog for defining logical expressions opens up here.

  Example line 1: Subtotal not on last page

  Appearance condition: not Lastpage()

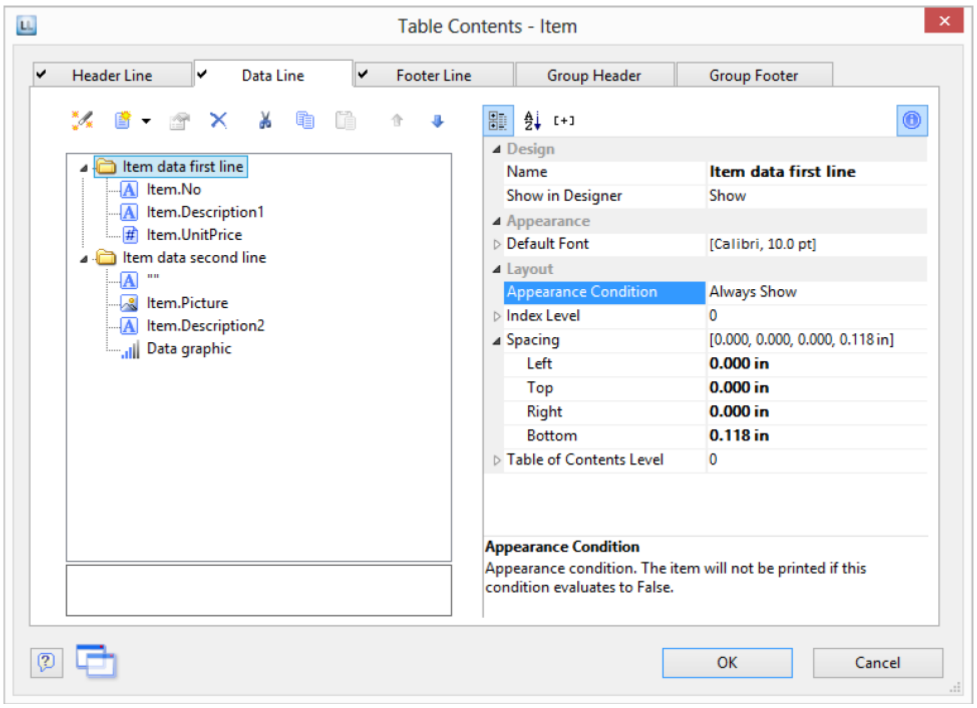
  Example line 2: Grand total only on last page

  Appearance condition: Grand total only on last page

- Name of the line e.g., "data first line". This makes it easier to find the line in complex layouts.

- Display in Designer: with this property, you can hide the lines in the workspace – this is very useful if you have a lot of line definitions.

- Spacing (margins): here you define the top, bottom, right and left spacing of the line. The "top" or "bottom" values cause a corresponding space between the individual table rows. With the "left" and "right" spacing values, you can specify the margin in relation to the table object, i.e., you can indent lines or columns.
- The "Default Font" property sets the font for the entire table row. Newly inserted columns appear initially in this font.
- Outline Level (index level) of the bookmark in preview mode or for PDF export.



Define Column Contents

You can define as many columns as you want for each line. You must only make sure that these columns can be displayed within the width defined for the table.

The individual columns are shown in the object dialog as a tree structure. The buttons let you edit, delete, cut, copy, insert and move the selected columns. You can also move columns outside of the line definitions by using Drag and Drop.

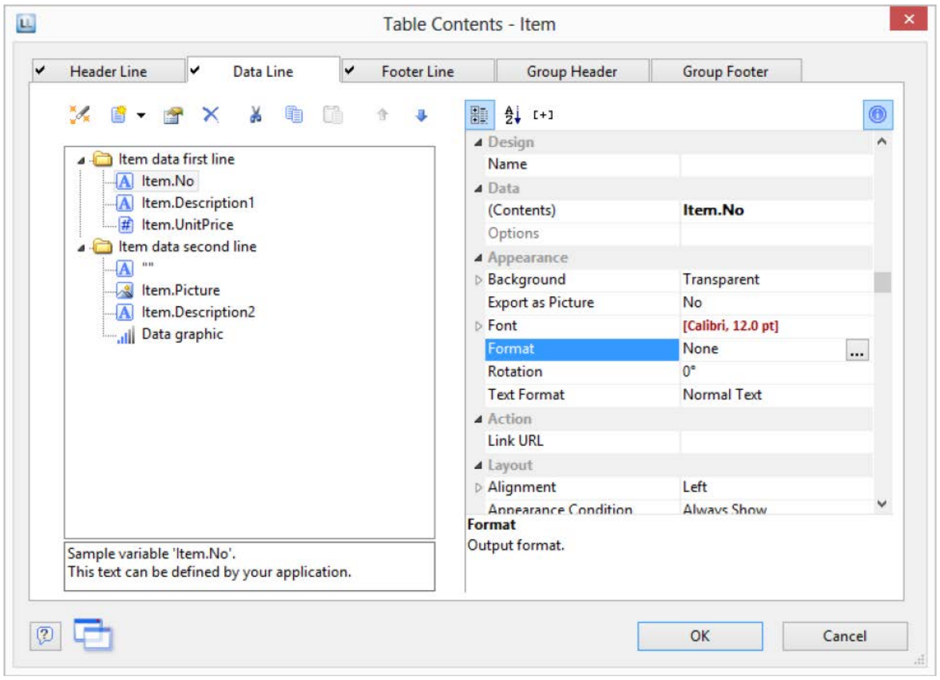
Proceed as follows to create new columns in the object dialog:

1. First select the line in which you want to insert a new column.
2. Now choose "Append column" in the context menu. (ALT+INS). Alternatively, you can select an existing Column definition and then click the "New (Append column)" button or the small downwards arrow next to this button to specify the type.

3. Each column has a certain type. Various properties are available for the column type including: text, drawing, barcode, RTF text, chart, gauge, HTML text and OLE container. When selecting a field, this data type will be set automatically.

4. To define the contents, the familiar formula wizard will appear in which you can define the column contents in the form of expressions. You will find more information about this under "Variables, Fields and Expressions".

5. Now define the column's properties. Each column in a line can be edited and formatted separately. Select the column that you want in the tree structure in the object dialog.



To select multiple columns, hold down the ALT or the SHIFT key. Various properties are available including:

- Formatting e.g., as number or currency.
- Name of the column: this will help you to maintain an overview with complex expressions. If you change the name directly in the tree structure, your change will also be applied as "content" where appropriate.
- You can specify when this column is to be printed with an "appearance condition". This is useful if you define multiple columns that are to be printed depending on certain values. The familiar dialog for defining logical expressions opens up here.
- Rotation of the content in increments of 90°.
- Background, frame, font, vertical and horizontal alignment.
- A fixed height for the field irrespective of the content.

- The column width.

Define Group Lines

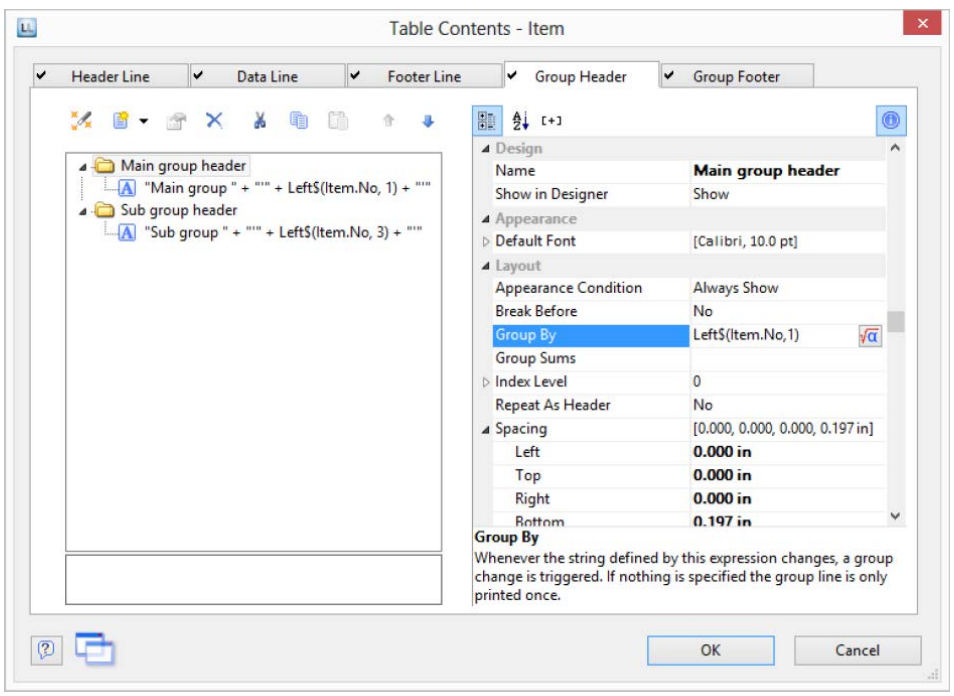
Group lines are a special type of line. They are used to group together the data lines that are to be printed.

You can use the "Group by" line property to specify how the data is to be grouped. This means that the line is printed whenever the result of the expression changes from one data line to the next. If you don't enter an expression, the line will not be printed and the property is highlighted in red in the property window.

A group header is printed accordingly before the data line is output, e.g., "Item group XYZ" group heading.

A group footer appears after the condition of the "Group By" property has changed, in other words, after outputting the data line. Group footers are suitable e.g., for totals of data within a group.

In the report container you can also output a group sum in the group header with the Precalc() function, e.g., Precalc(Sum(Item.UnitPrice, <GroupBy-String>)).



Example: Grouping by the first letter of the "Item.No" field.

Item no	Barcode	Description	Price in €
Main group 'E'			
Sub group 'EXP'			
EXPSA01		Southern Africa Explorer: 20-day tour from Cape Town to Victoria Falls excluding flight	1500.00
EXPCH01		Northern & Southern Chile: 23-day tour from Santiago to Punta Arenas including flight	3500.00
EXPMAL01		Maldives diving trip: 14 days, southern Male Atoll, Paradise Beach **** excluding flight	1800.00
EXPHK01		Hong Kong and Bali: 2 weeks, including flights, accommodation, excursions	1760.00
EXPYUC01		Yucatan, On the Trail of the Maya, 2-week round trip, excluding flight	1200.00
EXPLON01		London, sightseeing tour with boat trip on the Thames	60.00
		6 items in 'EXP' =	9820.00
Sub group 'EXC'			
EXCPAR01		Paris, visit to the Louvre including guided tour and admission	40.00
		1 items in 'EXC' =	40.00
		7 items in 'E' =	9860.00
		7 items in total	9860.00

1. Create a new line definition on the "Group header" tab. Enter the following expression for the content of the column:

   "Main group: ' + Left$ (Item.No,1)"

   The result of the expression "Left$ (Item.No,1)" is the first character of the "Item.No" variable. Whenever the first letter of "Item.No" changes, the text "Main group: " and the first letter in each case will be printed.

2. Enter "Left$ (Item.No,1)" as the condition for the "Group By" property.

   With each new first letter, a corresponding intermediate header will be printed in the list.

3. Multiple line layouts are possible with group headers as well. In this way, you can produce hierarchically structured intermediate headers. For example, you can define a line layout that is produced, as in the above example, based on the first letter of the "Item.No" variable. In addition, you define a second line layout that produces intermediate headers based on the first three characters of "Item.No".

4. Create a new line grouping for the sub-group header in the same way. Enter "Left$ (Item.No,3)" as the condition for the "Group By" property.

   Enter the "sub-group" for the content of the column: ' + Left$ (Artikel.Nr,3)": When the first 3 letters change, a corresponding intermediate header will be printed in the list.

Along with the properties of the "normal" lines, you also have the following at your disposal:

- Group sums: You can set sum variables to 0 here once they have been output in order to produce group sums.
- Page break before outputting a group header or break after outputting a group footer.
- The option of always displaying the group header additionally at the start of the table if the group has been separated by a page break.

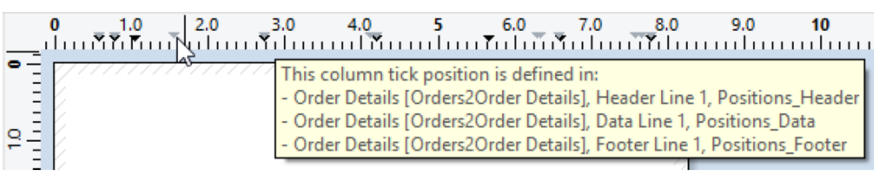
Table Layouts

There are various properties and functions which you can use to influence the layout of a table.

Align Columns

There are various ways of simplifying the use of table objects.

- If you hold down the CTRL key when reducing the size of a table, all columns will be automatically reduced in size by the same factor.
- The width of the columns adjusts automatically. You can adjust the width of a column manually by moving the separating line to the right or the left with the mouse. This changes all table columns, whose separators are within +/-2 mm from the mouse position. If you hold down the CTRL key, the action will only be carried out for the line on which the mouse is positioned. If the "Column width modification affects next column" option is enabled (File > Options > Workspace), you can alter the column width while making the next column smaller.
- If you move the first column separator to the right with the mouse, an empty column will be created in all line definitions.
- Use the function TableWidth() to define the column widths relatively. It returns the width of the table object. Example: With TableWidth()*30/100 the Column takes 30% of the width.
- You can hide Line Types (header, data, footer, group lines) in the workspace. To do this, select the table object and use Visible Line Types in the context menu or the corresponding menu item View> Visible Line Types.
- To align (sub) tables easier with one another, additional tick marks can be shown on the ruler by means of an element property.



Fixed Size

The "Fixed Size" property lets you specify that the size of the table is not to be adjusted automatically when fewer data lines are printed than the available space in the table object.

This property is useful to ensure that footers are always printed at the bottom of the page, e.g., if the page number is output in the footer. If the property is disabled, the end of the table automatically moves upwards (and the footer therefore also).

Print Header Lines and Footer Lines Again

If the print of a table is continued on the following page, the header lines of this table and the outer table will be printed again. To suppress repeated printing of the header lines on the following page, use the FirstHeaderThisTable() function as an appearance condition.

This functionality is also available for footer lines, here you use the LastFooterThisTable() function as the appearance condition. This ensures that footer lines are only output on the last page of the table in the event that the print is continued on the following page due to lack of space.

Define the Size of the Table Variably

You can define the height and width of the report containers variably to avoid data being truncated when the page format is changed (e.g., from portrait to landscape).

To do this, select the report container in the "Report Structure" tool window and use the LL.Device.Page variables and the UnitFromSCM() function to specify the height and width.

Position		[0.591, 2.086, 7.790, 10.762 in]
Left	**UnitFromSCM(15000)**	**[0.591 in]**
Top	**UnitFromSCM(52980)**	**[2.086 in]**
Width	**LL.Device.Page.Size.cx - UnitFromSCM(27130)**	**[7.199 in]**
Height	**LL.Device.Page.Size.cy - UnitFromSCM(76600)**	**[8.676 in]**

Position
Position of the object.

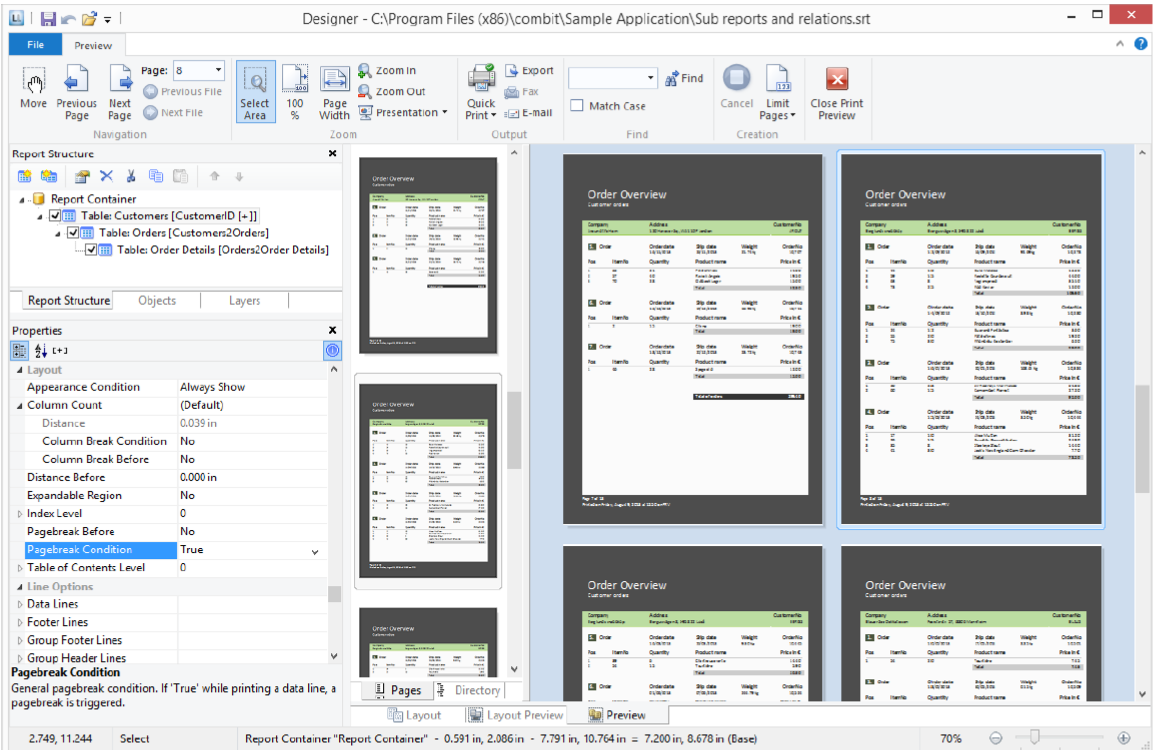
Force a New Page

With complex projects containing hierarchical tables, it is sometimes wise to create a page break before outputting a line of the "top" table.

Alternatively, you may want to have a new page if, after outputting a data line of the "top" table, there is not enough room for the following data lines of the sub-table.

You can handle both cases with the "Pagebreak Condition" property.

For example, in the case of a hierarchical table, in order to output each data line of the main table on a new page, select the main table in the "Report Structure" tool window and set the "Pagebreak Condition" property to True.



Create a Conditional Page Break

Let's assume that you want to create a continuous table. However, you want to avoid printing data lines from the main table at the bottom of the table unless there is enough room for at least 3 data lines from the sub-table.

You do *not* want it to look like this:

Product categories

1	**Beverages**	
1.1	Chai	
	Type of bearing	10 boxes x 20 bags
	Supplier	Exotic Liquids
1.2	Chang	
	Type of bearing	24 - 12 oz bottles
	Supplier	Exotic Liquids
1.3	Chartreuse verte	
	Type of bearing	750 cc per bottle
	Supplier	Aux joyeux ecclésiastiques
1.4	Côte de Blaye	
	Type of bearing	12 - 75 cl bottles
	Supplier	Aux joyeux ecclésiastiques
1.5	Guaraná Fantástica	
	Type of bearing	12 - 355 ml cans
	Supplier	Refrescos Americanas LTDA
1.6	Ipoh Coffee	
	Type of bearing	16 - 500 g tins
	Supplier	Leka Trading
1.7	Lakkalikööri	
	Type of bearing	500 ml
	Supplier	Karkki Oy
1.8	Laughing Lumberjack Lager	
	Type of bearing	24 - 12 oz bottles
	Supplier	Bigfoot Breweries
1.9	Outback Lager	
	Type of bearing	24 - 355 ml bottles
	Supplier	Pavlova, Ltd.
1.10	Rhönbräu Klosterbier	
	Type of bearing	24 - 0.5 l bottles
	Supplier	Plutzer Lebensmittelgroßmärkte AG
2	**Condiments**	

You can avoid this by means of the RemainingTableSpace() function. This function returns a value showing the available space. If you set the parameter to "True", the value will be returned as 1/1000 mm.

If you want to specify that a new page should be started before outputting the data line of the main table if the space remaining is less than 3 cm, enter the following formula for the "Pagebreak Condition" property:

RemainingTableSpace(True)<30000

Keep Lines Together

If the print of a table is continued on the following page due to lack of space, you can decide whether the lines are to be separated or kept together if possible.

This option is useful for multi-line data lines or for invoice footer lines containing totals. You can use this option with data lines, footer lines, group footers and group headers.

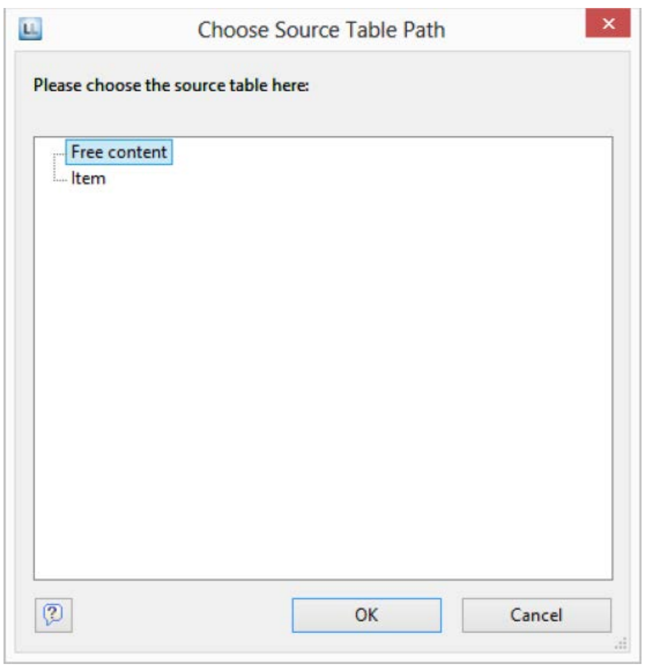
Output Free Content Before and After a Table

You can output free text before and after a table. To do this, use the RTF object and link the object to the project as free text via the report container.

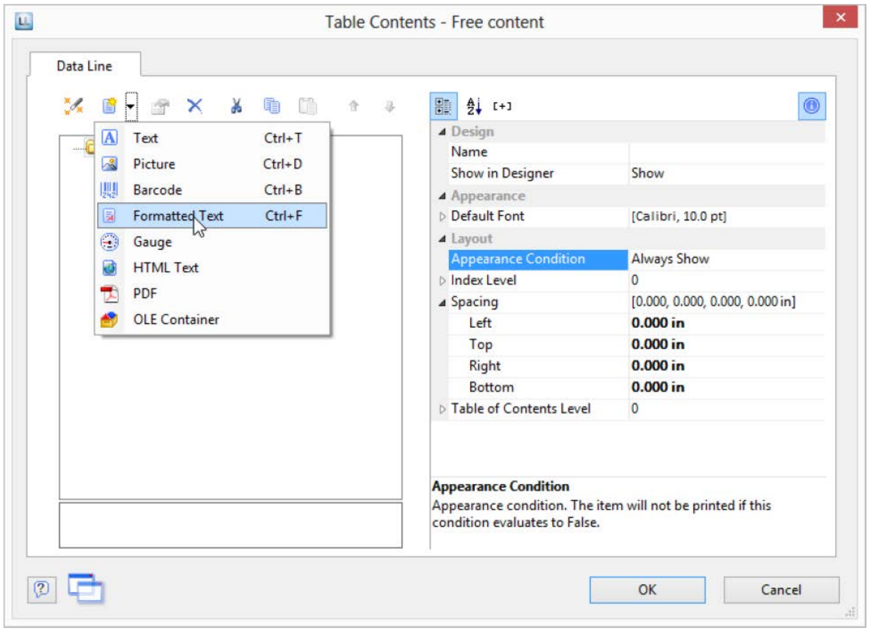
1. To add a new element to the report container, select the "Append an element" or the "Append a sub-element" button in the "Report Structure" tool window.

2. A selection dialog will appear for the chosen object type. Choose the "Table" object type.

3. In the following dialog, select "Free content" as the data source.



4. Then add a column via the properties dialog for the table object. In our case, we want to create the covering letter as formatted text. Therefore, click the small arrow on the right of the button and choose the Formatted Text option.



5. A dialog appears where you can type in the covering letter in the form of continuous text. You will find detailed instructions for working with formatted text in Chapter "Practice: Create a Mail Merge Project".

6. Please don't forget to remove the (column) frame for free content. The best way is to remove the frame via the "Default Frame" property in the element properties.

7. You may also have to change the layer condition as the covering letter will now be output on the first page.

8. If the General Terms and Conditions are also to be output at the end of the invoice, you must add another free content object to the container after the item table. Then you have several options:

   a. Use the Formatted Text object here as well.

   b. Use the PDF object and include the General Terms and Conditions in PDF format.

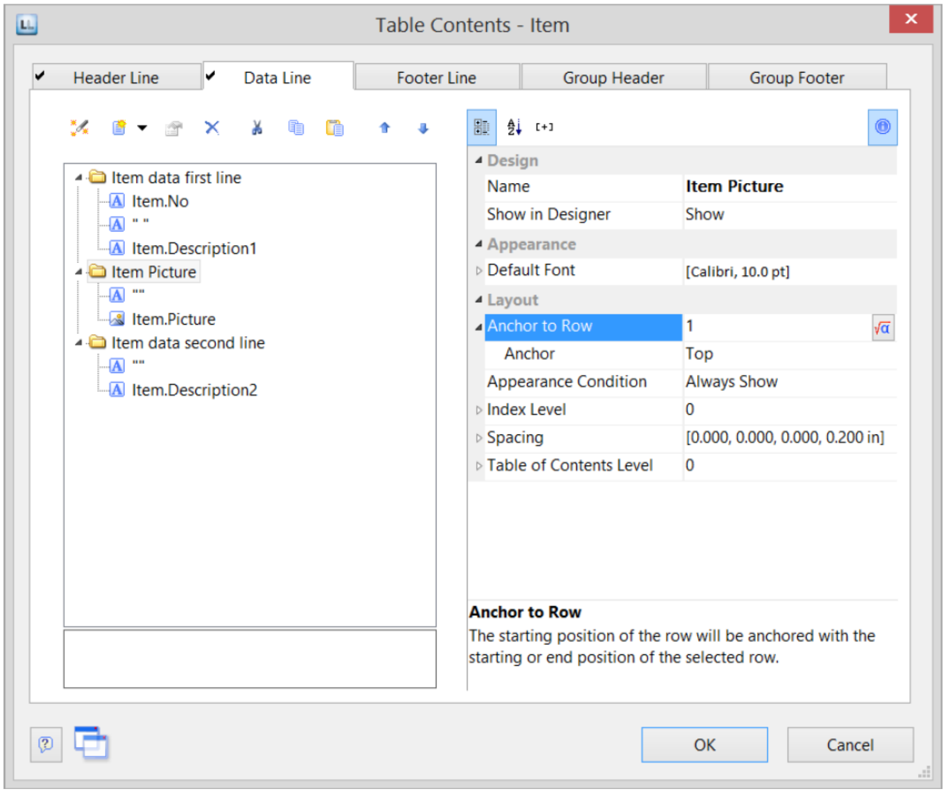
   c. Use the LoadFile$() function to load a linked file and enter the path of the file as the parameter as follows LoadFile$ (ProjectPath$()+"\gtc.txt").

   d. For the issue on a reverse side, see "Reverse Side" in Chapter "Report Sections".

Anchored Lines (Overlapping Cells)

Let us assume that you want to output the contents of a column across two lines. You can achieve this by anchoring two lines to each other by the line property "Anchor to row" (Index (1-based) of the row; 0=no anchoring). So the beginning of the next line definition will be forced to the beginning or the end of another line definition. Hence the cells can overlap.

Note: This function is not supported by all export formats.



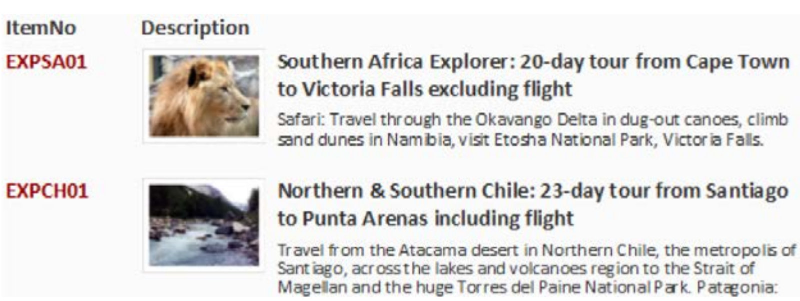
Let's assume that you want to create two lines next to an image column:

1. Define in the first line with 3 columns: "Item.No" (column width 1), empty content, a space (column width 1), "Item.Description" (column width 3).

2. Define in the second line with 2 columns: empty content, "Item.Picture" (both column width 1). in the line properties set "Anchor to Row" to "1" to anchor this line with the first line definition.

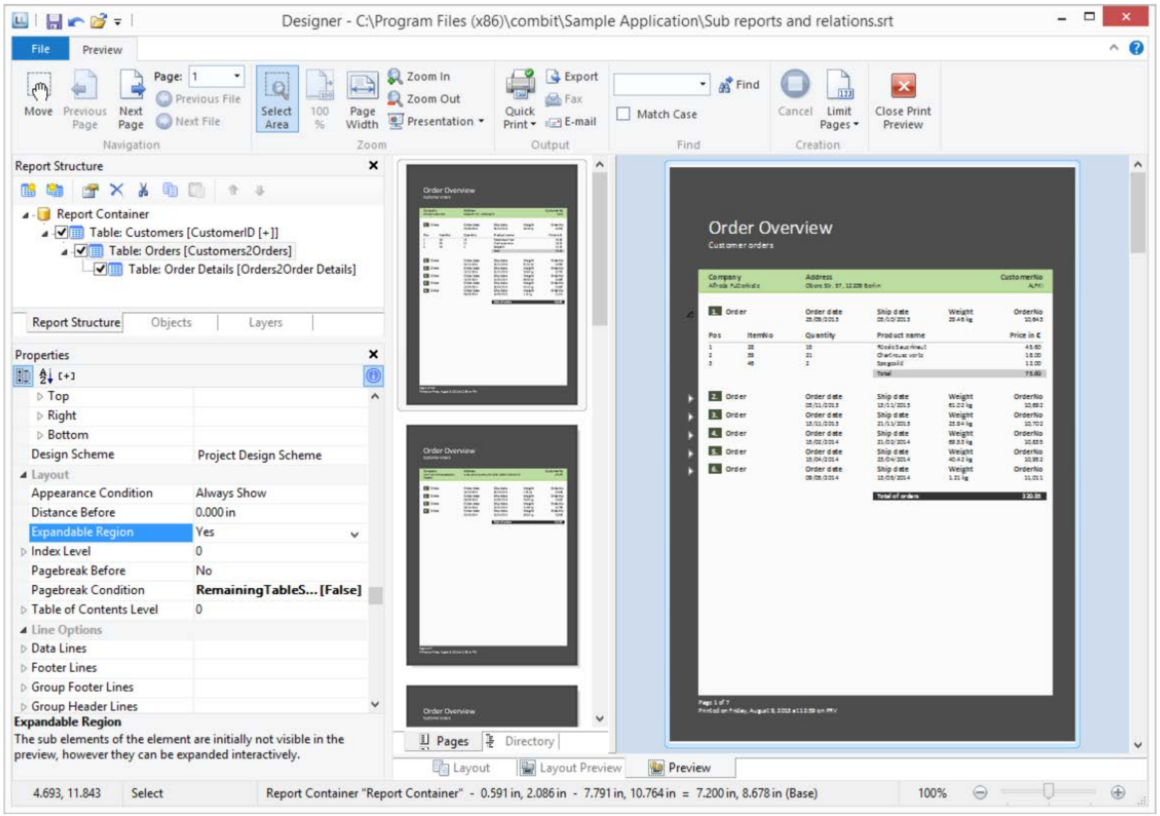
3. Define the third line also with 2 columns: empty content (column width 2), "Item.Description2" (column width 3).

4. Thus, the second line is printed in the same starting position as the first line and the cells may overlap:



Expandable Region

When you activate the property "Expandable Region", the sub-elements of an element are not printed into the preview at first during printing, and a drop-down symbol will be displayed on the line itself. Clicking on the symbol expands the region for the corresponding line, providing a drill-down option without having to leave the current preview, and without having to design a separate project.



Creating Charts

This object is used to evaluate and display data graphically in diagrams. This gives you an overview of your data and lets you recognize anomalies immediately.

For example, you can analyze sales trends, illustrate percentage shares and show data in multiple dimensions. You have a wide range of different types of diagrams at your disposal:

- Circle/Donut chart
- Bar/Ribbon chart (also displayed as cylinders, pyramids, cones, octahedrons)
  - Simple (e.g., sales per customer)
  - Multi-row (e.g., sales to various customers over the years, scaled by customer)
  - Clustered (e.g., sales to various customers over the years, grouped by year)

- Stacked (e.g., percentage of sales to various customers stacked over the years)
- 100% stacked (e.g., respective sales percentages for various customers over the years)

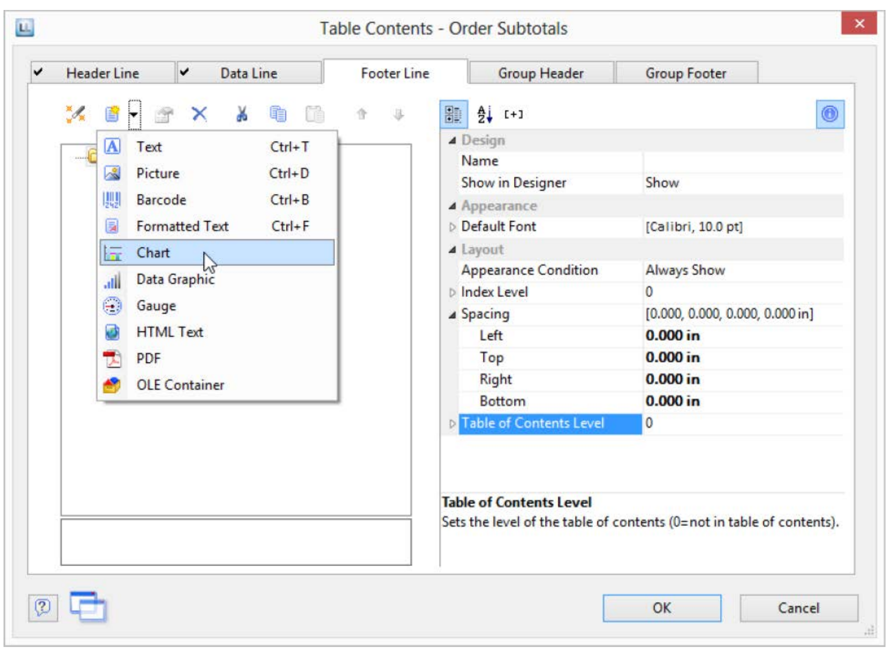
- Line/Symbol: Simple, Multi-row, Stacked, 100% stacked
- Area: Simple, Stacked, 100% Stacked
- Bubbles/Dots: Distributed, Sorted (Displayed as circle, drop or picture file)
- Funnel/Pipeline
- Map/Shapefile

Insert a Chart Object

There are various ways of outputting chart objects:

1. A chart as an element in the report container. Add the object via the "Report Structure" tool window. If you have not yet added a report container to the workspace, select Insert > Report Container (Objects > Insert > Report Container) and pull the object to the right size in the workspace while holding down the left mouse button. A selection dialog will appear for the chosen element type. Choose the "Chart" element type.

2. You can output charts and gauges in a table cell. To do this, select the relevant entry by means of the context menu in the object dialog for the table. If you want to output the aggregated data, a good way of doing this is to use a footer line.

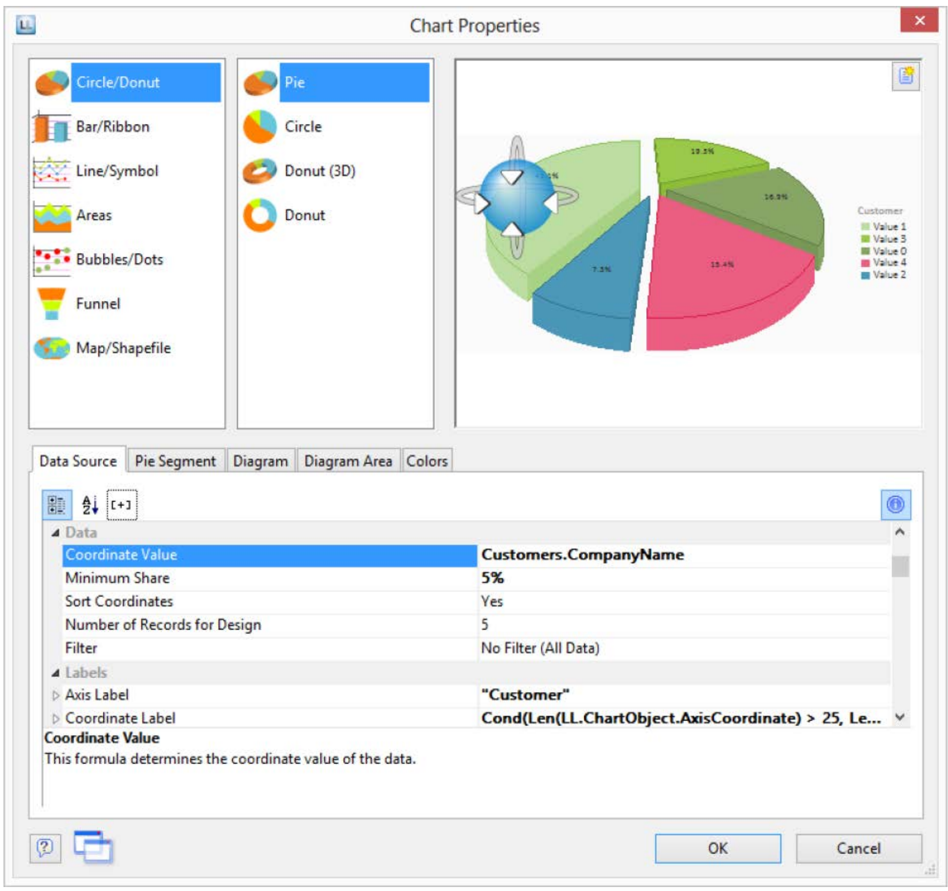


3. In the following dialog, now select the data source. All available tables are shown hierarchically, in other words, under the tables you will find the relational tables in each case.

   To evaluate sales per country, for example, choose the "Customers > Orders > Order Details" table in the Sample Application so that you have all three tables at your disposal. The "Customers" table contains the country, the "Orders" table the order date and the "Order_Details" table the sales.

4. The chart object dialog is displayed. In the drop down lists in the top left you can select the base type and the corresponding sub type.

5. The axes are defined in the tabs (Category Axis, Series Axis, Value Axis, Data Source, Segment, Funnel Segment, Shapefile Selection). You can click directly into the live preview (e.g., onto the title or axis label) to quickly jump to the corresponding property.



6. On the "Diagram" tab, select the general diagram options (e.g., perspective, color mode).

7. On the "Object" tab, select the general layout options for the entire chart object (e.g., Title, Background).

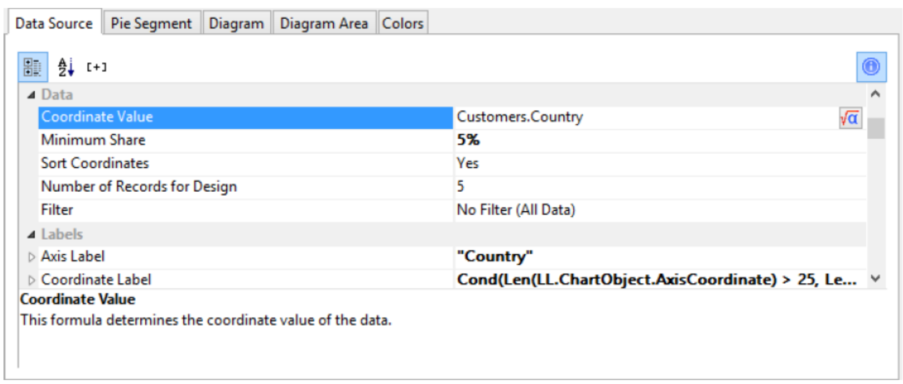
8. On the "Colors" tab, you can specify the colors for the display:

- Design Scheme: Specifies the colors and color sequences for the data rows that are not specified by the "Fixed Colors". You can select a predefined color set from the drop down list. These colors can still be adjusted in the properties.
- Fixed Colors: You can assign fixed colors to particular axis values. If you click the "New" button, you can create a new assignment e.g., Customers.Country = "Germany".

Pie, Donut, or Circle Chart

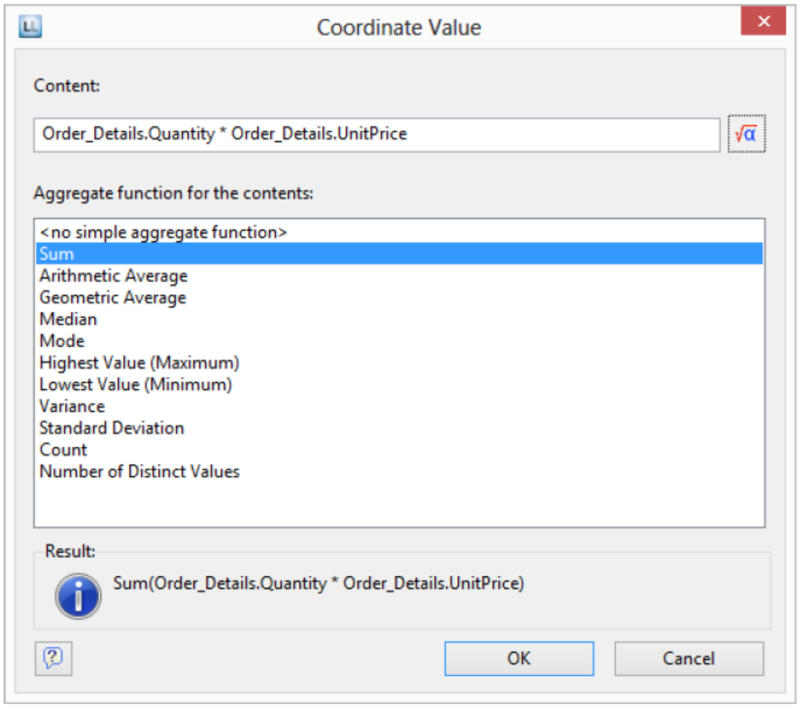
Let's assume that you want to evaluate the sales per country. The pie chart is the right choice for this. It lets you read off the percentages immediately. Proceed as follows in the Sample Application:

1. As the data source, select the "Customers > Orders > Order_Details" table.
2. For the diagram type, click Circle/Donut > Pie.
3. You should first specify the coordinate values for the data source, i.e., the values that define the individual segments, e.g,. Customers.Country.



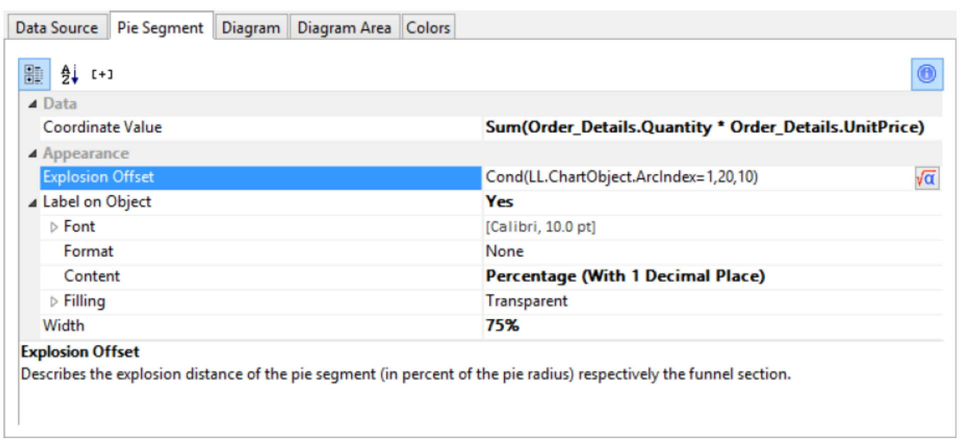
4. Switch to the "Segment" tab to specify the coordinate values for size of the segment, i.e., the sales. Double-click the "Coordinate Value" property.

   Now select the aggregate function that you want for the contents in the "Coordinate Value" dialog that follows. You want to create a sales evaluation so choose the "Sum" function.



5. In the upper part of the dialog, you can specify the contents by clicking the formula button to start the formula wizard. In the Sample Application, the sales per order value is not supplied directly as a field so you must calculate it using the "Order_Details.Quantity * Order_Details.UnitPrice" formula.

6. The "Label on Object" property is already set to "Yes" so that a label with the percentage value is shown on the segments. Define the value as "percent" without decimal places by means of the "Format" property.



7. The "Explosion Offset" property lets you specify a distance to the center for the segment. With the "ArcIndex" chart field, which numbers the segments according to their size, you can even display the largest segment with a greater offset. Example:

Cond (LL.ChartObject.ArcIndex=1,20,10)

8. On the "Diagram" tab, select the general diagram options. Various properties are available including:

   - The degree of perspective, e.g., strong.
   - The color mode, e.g., single color

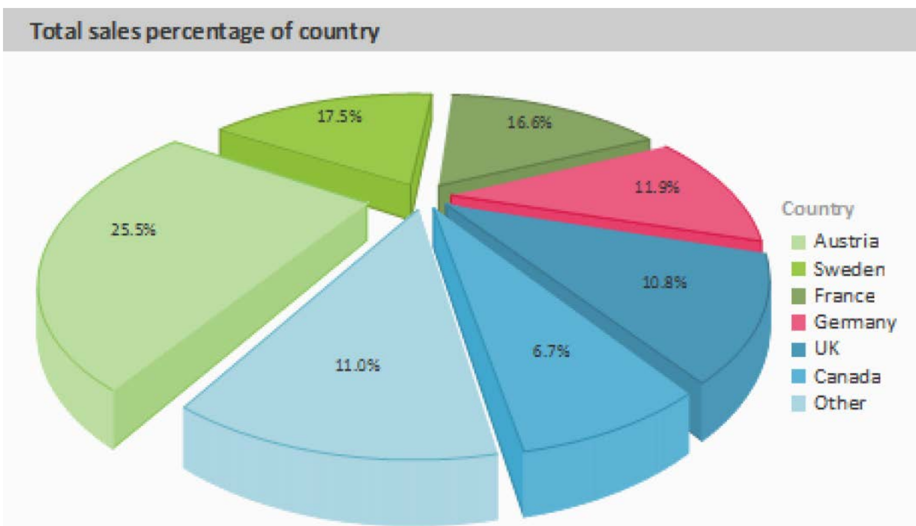
9. On the "Diagram Area" tab, select the general layout options for the entire chart object. Various properties are available for this including:

   - Title
   - Background including filling, border and shadow, e.g., border = transparent

10. On the "Colors" tab, you can specify the colors for the display:

    - Design Scheme: Specifies the colors and color sequences for the data rows that are not specified by the "Fixed Colors". You can select a predefined color set from the drop down list. These colors can still be adjusted in the properties.
    - Fixed Colors: You can assign fixed colors to particular axis values. If you click the "New" button, you can create a new assignment e.g., Customers.Country = "Germany".

11. The pie chart now looks like this:

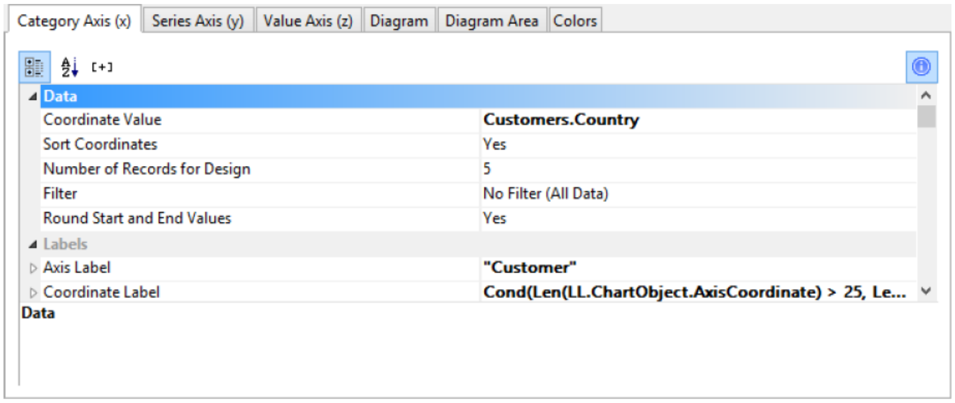


Multi-Row Bar Chart

Let's assume that you want to evaluate the sales for various countries over the years, scaled by country. A multi row bar chart is perfect for this. You get a diagram in which you can see the turnover achieved in the respective country for each quarter. Proceed as follows in the Sample Application:

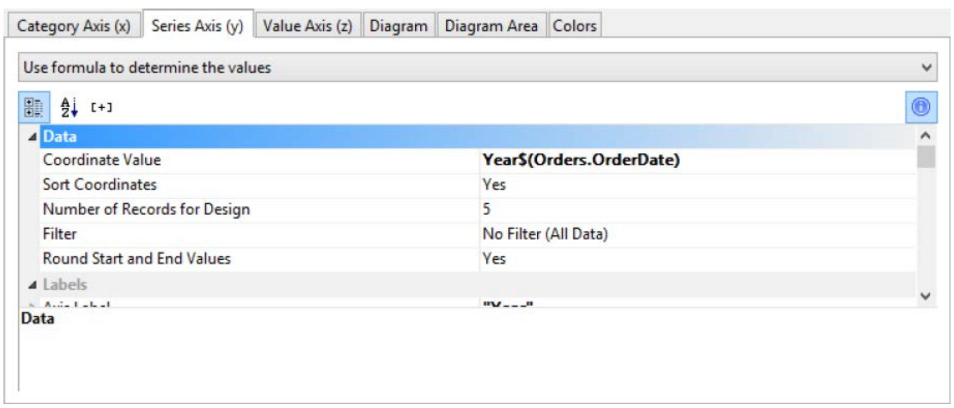
1. As the data source, select the "Customers > Orders > Order_Details" table.
2. Choose Bar/Ribbon > Multi-Row (3D) as the diagram type.

3. First specify the coordinate value for the category axis, i.e., the value of the x-axis. Select the "Customers.Country" field via the formula wizard.



4. Now specify the coordinate value for the series axis, i.e., the value of the y-axis. In the Sample Application, the order year is not supplied directly as a field so you must calculate it using the "Year$(Orders.OrderDate)" formula.

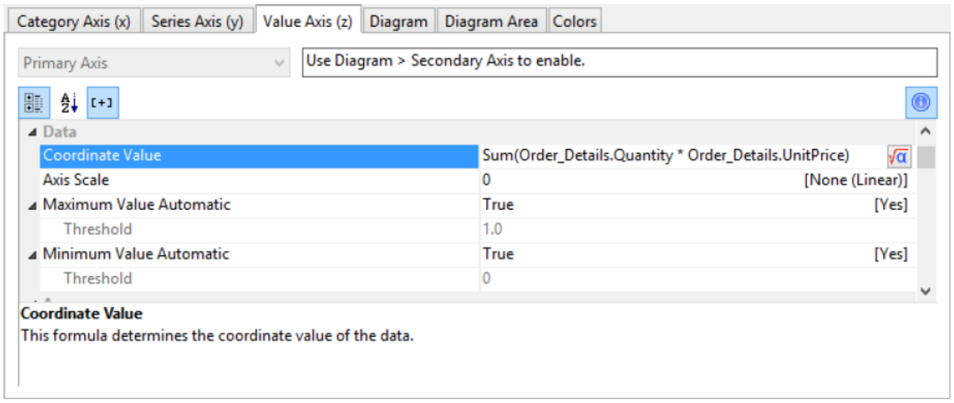
   If you want to evaluate the data by year, simply enter "Year$(Orders.OrderDate)" as the coordinate value. Type "Year" as the text for the "Axis Label".



5. Now specify the coordinate values for the value axis (z-axis), i.e., the height of the bars representing the turnover. Double-click the "Coordinate Value" property.

   Now select the aggregate function that you want for the contents in the "Coordinate Value" dialog that follows. You want to create a sales evaluation so choose the "Sum" function.

6. In the upper part of the dialog, you can specify the contents by clicking the formula button to invoke the formula wizard. In the Sample Application, the sales per order value is not supplied directly as a field so you must calculate it using the "Order_Details.Quantity * Order_Details.UnitPrice" formula.

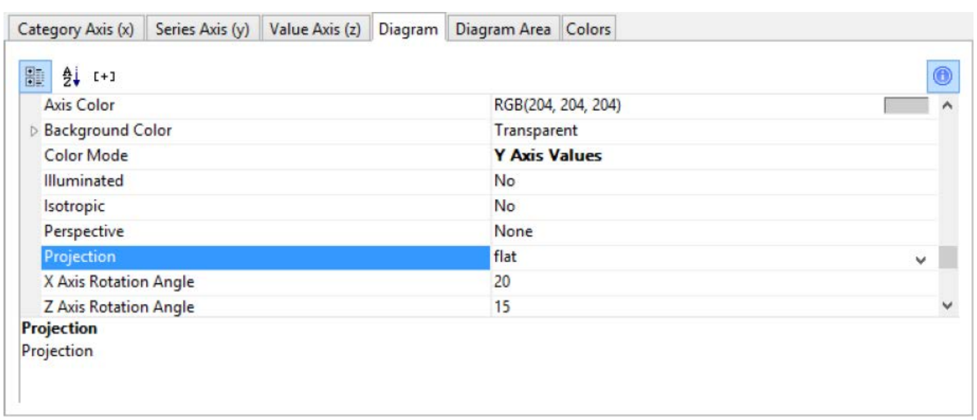


7. Various other properties are available on this tab including the following layout options:

   - Maximum Value Automatic: You can limit the height of the displayed area, e.g., to cater for "anomalies".
   - Presentation: The data can be presented in various ways: cylinders, bars, pyramids, ribbons, octahedrons, cones
   - Thickness of the bars
   - Zebra mode for the background

8. On the "Diagram" tab, select the general diagram options. Various properties are available including:

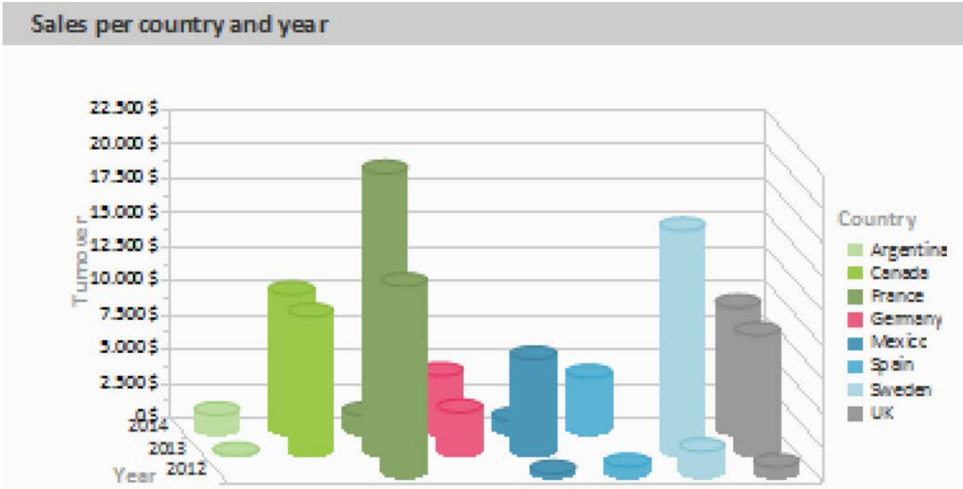
   - The Projection, e.g., flat.
   - Color Mode: Specifies which axis determines the color, e.g., the y-axis values.



9. On the "Diagram Area" tab, select the general layout options for the entire diagram. Various properties are available for this including:

   - Title
   - Background including filling, border and shadow, e.g., border = transparent

10. The multi-row bar chart now looks like this:



100% Stacked Bar Chart

The pie chart in the first example gave you an overview of the percentages for the entire evaluation period. But in order to be able to recognize trends, it would be good to see how the percentages have changed during the course of the evaluation period. The 100% stacked bar chart can be used for precisely these types of applications. The respective percentage of the length of the bars relates directly to the turnover percentage of the respective country.

Proceed as follows in the Sample Application:

1. As the data source, select the "Customers > Orders > Order_Details" table.

2. Choose Bar/Ribbon > 100% stacked as the diagram type.

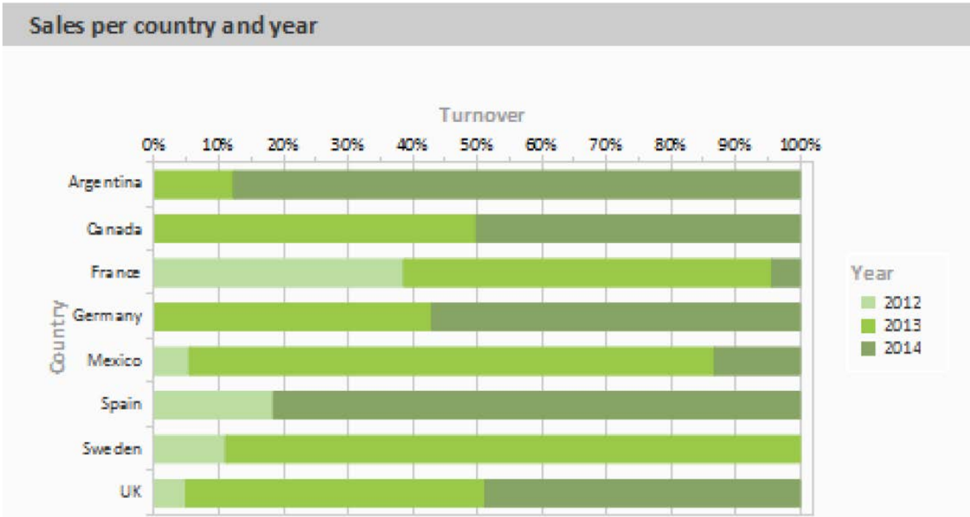
3. First specify the coordinate values for the category axis, i.e., the values of the x-axis. Select the "Customers.Country" field via the formula wizard.

4. Now specify the coordinate values for the series axis, i.e., the values of the y-axis. In the Sample Application, the order year is not supplied directly as a field so you must calculate it using the "Year$(Orders.OrderDate)" formula.

5. Specify the coordinate values for the value axis (z-axis), i.e., calculate the turnover with "Sum(Order_Details.Quantity * Order_Details.UnitPrice)".

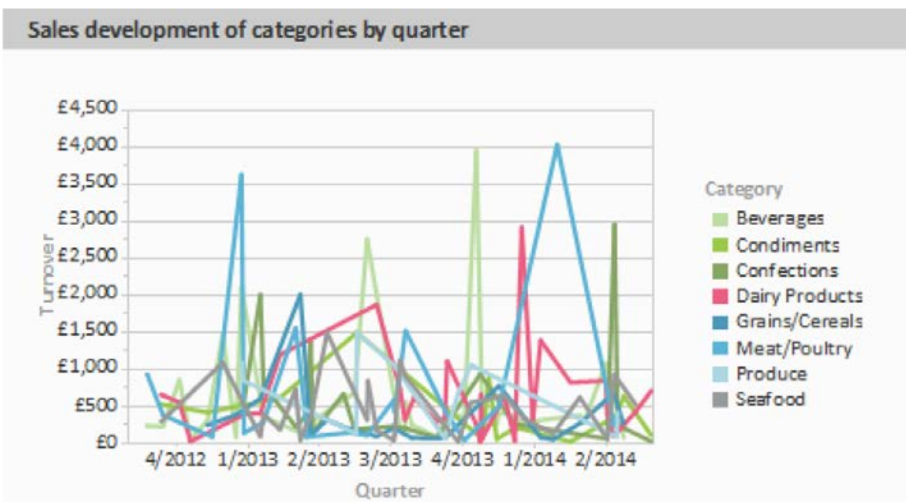
6. On the "Diagram" tab, choose "Left to Right" for the "Alignment" to create a horizontal diagram.

7. The multi-row bar chart now looks like this:



Multi-Row Line Chart

A line diagram offers an alternative to a multi-row bar chart. You can read off the values faster here.



Proceed as follows in the Sample Application:

1. As the data source, select the "Customers > Orders > Order_Details" table.

2. Choose Line/Symbol > Multi-Row as the diagram type.

3. First specify the coordinate value for the category axis. Select the "Orders.OrderDate" field via the formula wizard.

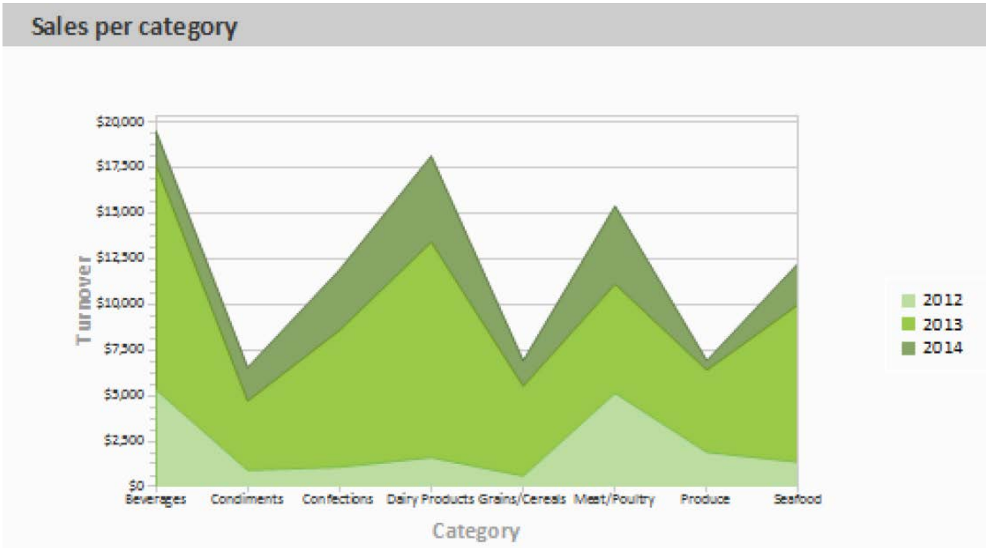
4. Select the property "Coordinate Label > Format" and select "%q/%y" in the Date-section (user-defined).

5. Now specify the coordinate value for the series axis. Select the "CategoryName" field via the formula wizard.

6. Specify the coordinate values for the value axis and calculate the turnover with the "Sum(Order_Details.Quantity * Order_Details.UnitPrice)" formula.

Stacked Area Chart

The stacked area chart is available as an alternative to the multi row line chart. This chart allows you to compare statistical relationships more swiftly as the areas between the lines are colored in.



Proceed as follows in the Sample Application:

1. Select the "Customers > Orders > Order Details" table as the data source.

2. Select Area > Stacked as the chart type

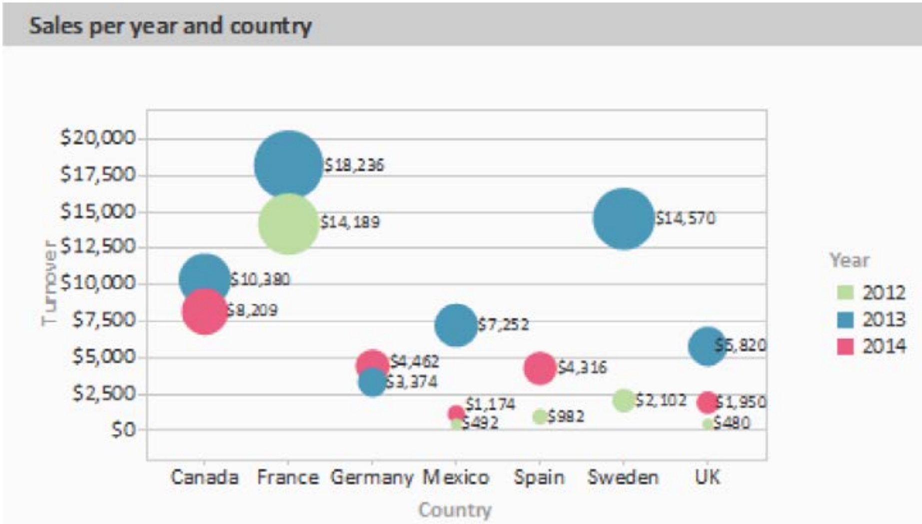
3. First specify the coordinate value for the category axis. Select the "CategoryName" field via the formula wizard.

4. Specify the coordinate values for the series axis. In the Sample Application, the order year is not supplied directly as a field, so you must calculate it using the "Year$(Orders.OrderDate)" formula.

5. Specify the coordinate values for the value axis (z-axis), i.e., calculate the turnover with the "Sum(Order_Details.Quantity * Order_Details.UnitPrice)" formula.

Distributed Bubble Chart

Bubble charts allow for a four-dimensional representation of statistics in that, along with the position on the y and x axes, the color and the size can be defined by statistical information. Diverse options are available regarding how you would like the bubbles to be displayed.



Proceed as follows in the Sample Application:

1. Select the "Customers > Orders > Order Details" table as the data source.

2. Select Bubbles/Dots > Distributed as the chart type

3. First specify the coordinate value for the category axis. Select the "Customers.Country" field via the formula wizard.

4. Specify the coordinate values for the series axis. In the Sample Application, the order year is not supplied directly as a field so you must calculate it using the "Year$(Orders.OrderDate" formula.

5. Specify the coordinate value for the value axis and the value for the Bubble Size and calculate for both the turnover with the "Sum(Order_Details.Quantity * Order_Details.UnitPrice)" formula.

6. Under this tab you will also find the options for how you would like the bubbles to appear.

Funnel

With a funnel or a pipeline, you can e.g., display your sales processes in the various phases. There are a variety of options for the way the data is presented.

To do so, proceed as follows:

1. Select the appropriate data source.

2. As the diagram type, select Funnel > Vertical Funnel.

3. First of all, define the coordinate value of the data source, i.e., the value that will define the individual funnel segments (the sales phase).

4. Switch to the tab "Funnel Segment" to define the coordinate value for the size of the funnel segment (number of sales opportunities). Double-click on the "Coordinate Value" property.

Now, in the subsequent dialog "Coordinate Value", select the desired aggregating function "Count" for the content.

5. For the labeling of the funnel segments with percentage values, the option "Label on Object" has already been set to "Yes". Then, via the property "Format", define the value as "Percentage (Without Decimal Places)" or as "Absolute Value".

6. You can enter an offset for the funnel values via the property "Explosion Offset".

7. In the "Chart" tab, select the general diagram options. The following properties are available (among others):

   - Relative Width of Funnel End/Start.

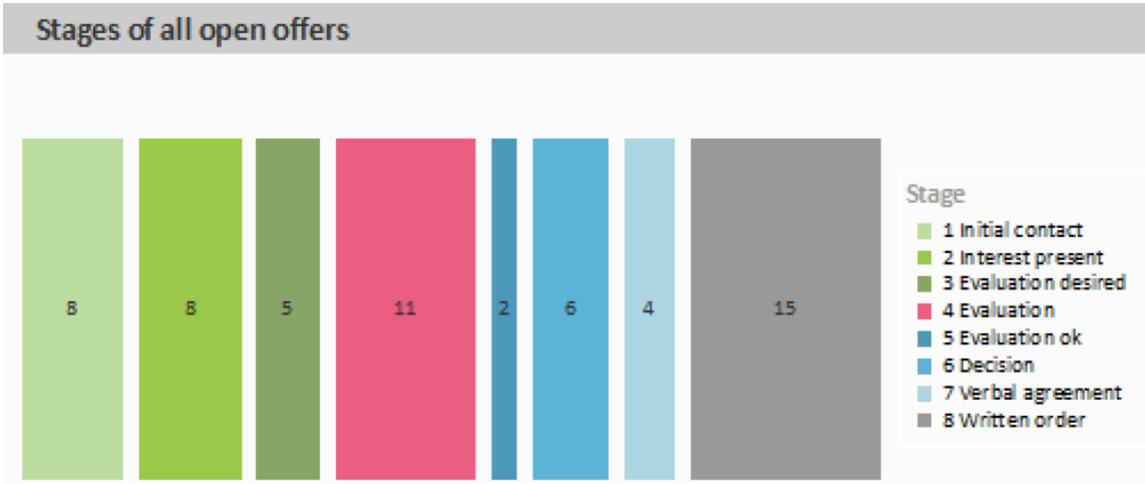
   - Color Mode, e.g., monochrome

8. In the "Chart" tab, select the general layout options of the entire object. The following properties are available (among others):

   - Title

   - Background incl. filling, border and shadow, e.g., border = transparent

9. In the "Colors" tab, you can configure the color options.

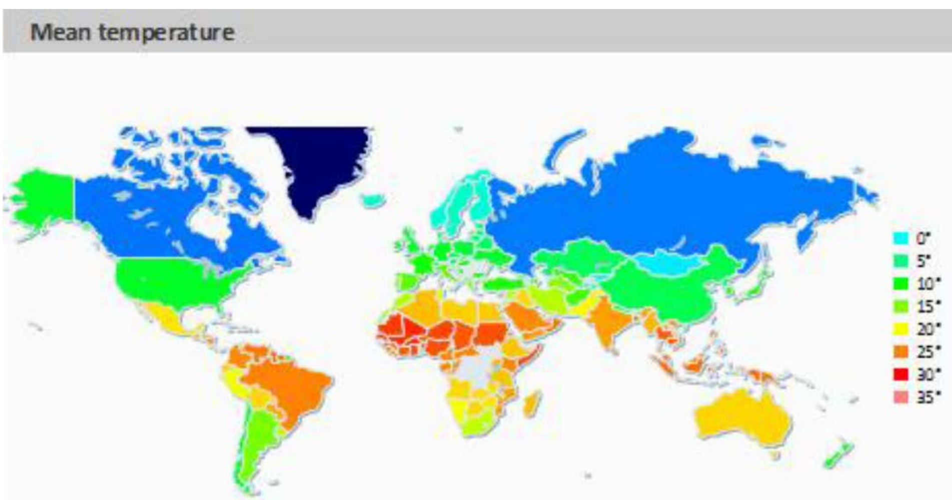


Map/Shapefile

Shapefiles enable a diverse range of visualization options via a standardized vector description format. Via corresponding templates, a wide range of maps, seating charts or floor plans can be generated. The Shapefile determines the shape, and an associated attribute database enables the shapes to be referenced to the properties (e.g., country names).

Tip: The availability of this chart depends on the application.

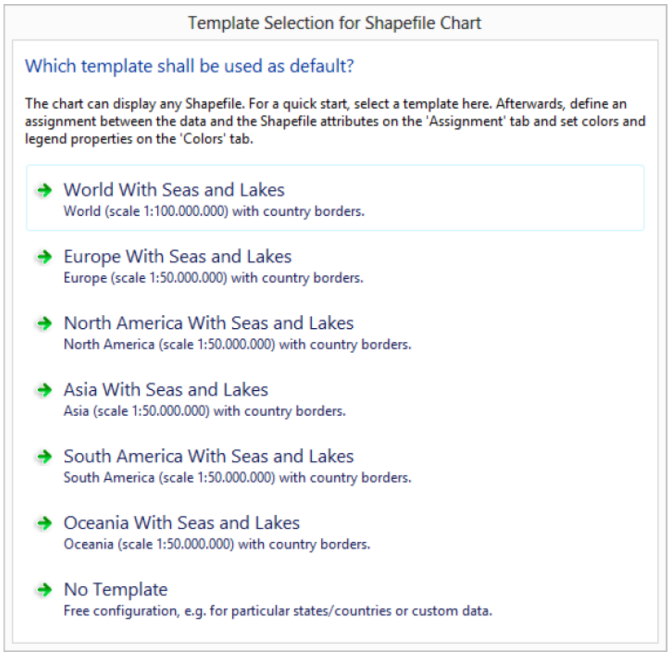
Example: A visualization of the temperature distribution of the earth is to be generated.



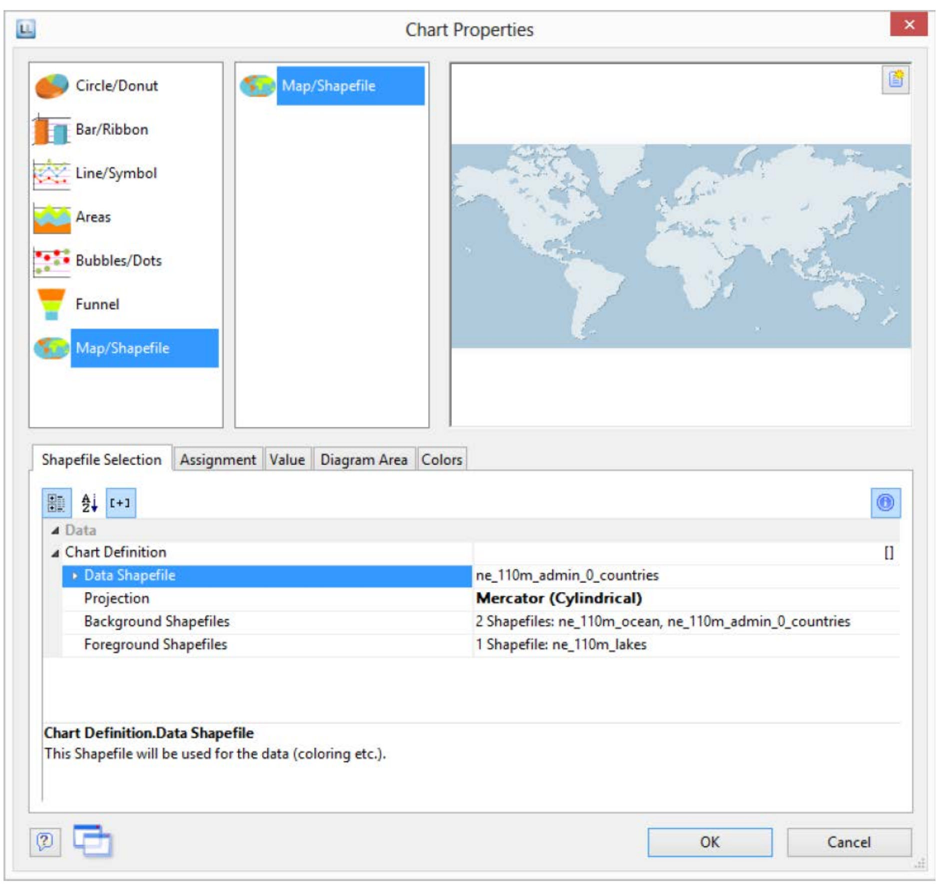
To do so, proceed as follows:

1. Select the table "ClimateData" as the data source.

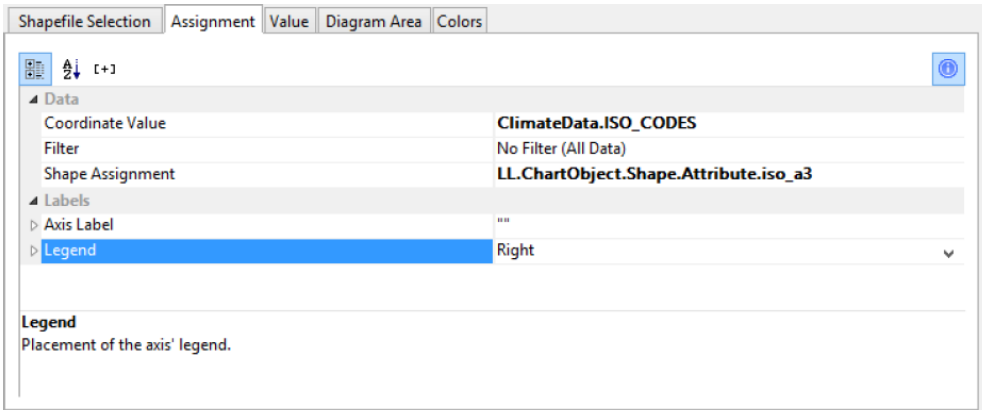
2. As the diagram type, select Map/Shapefile. At this point, a selection dialog appears for the Shapefile templates provided with the software. Select "World With Seas and Lakes".



3. You will now see the preconfigured data Shapefile in the tab "Shapefile Selection". In addition to the data itself, you can also select foreground and background Shapefiles in order to e.g., display the oceans in the background and the rivers and lakes in the foreground.



4. Click on the "Assignment" tab in order to link the data with the shapes.

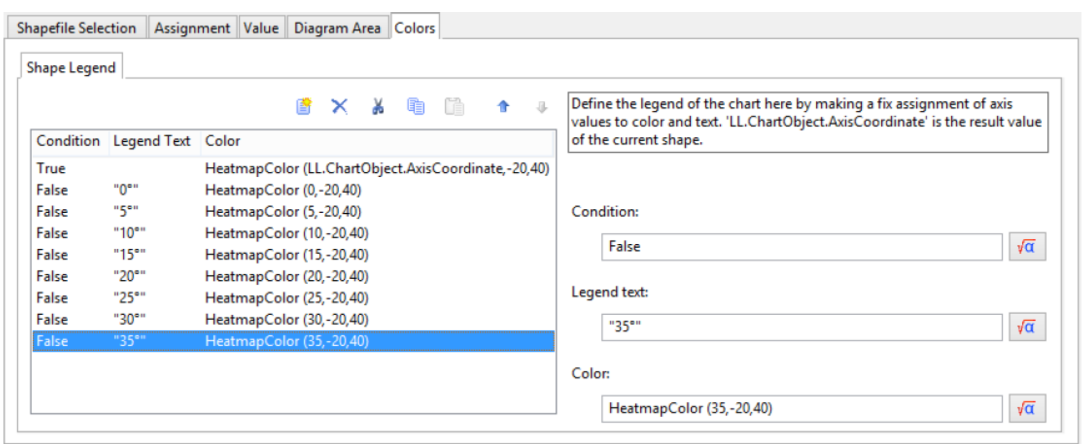


Link the coordinate value "ISO_CODES" from the data with the attribute "iso_a3" from the Shapefile. By doing this, the data that is related to e.g., "USA" is linked to the outline of "USA"; the temperature from "United States of America" is linked to "United States of America", and so on.

5. Go to the tab "Value" and select the mean temperature as the "Value", i.e., the field "ClimateData.Tmean".

6. Go to the tab "Colors" to define the legend. As the first entry, define the color via the function HeatmapColor(LL.ChartObject.AxisCoordinate,-20,40) and set the condition to "True". The value will then be used for the actual color fill, and you will obtain a continuous fill color.

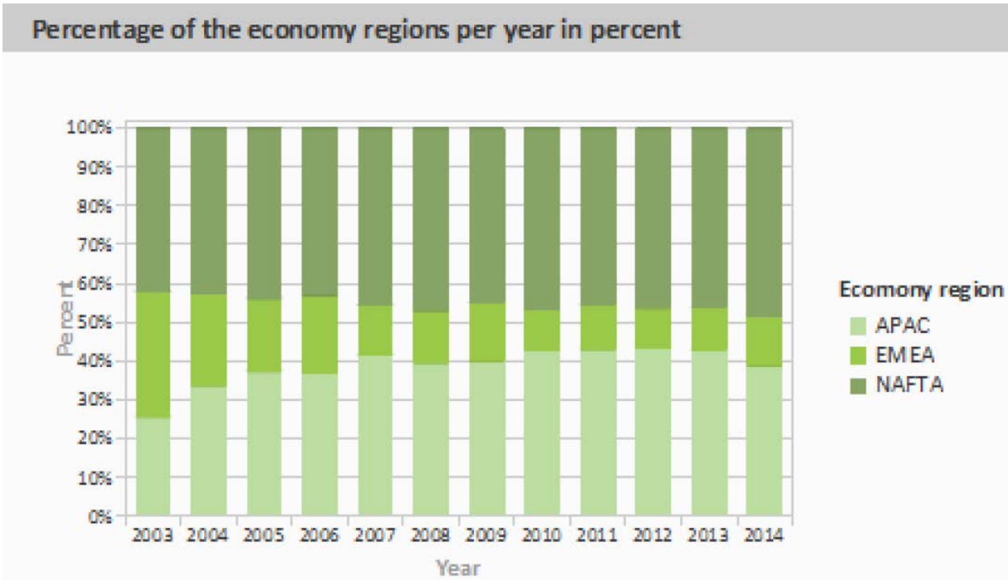
7. For the other discrete legend values, enter the corresponding functions, e.g., HeatmapColor(5,-20,40) with the legend text "5°" and set their condition to "False". This means that the value will only be used for the legend.



Use Series to Determine the Values

With three-axis diagrams, you can also determine the values of the series axis (y-axis) by means of rows. This means that you define the different rows (e.g., measured value/target value/actual value) with a single data record and can show them parallel e.g., in a bar chart.

As an example, we will create a diagram which shows the currency percentages of the 3 economic areas. Data for APAC, EMEA and NAFTA is supplied as rows.



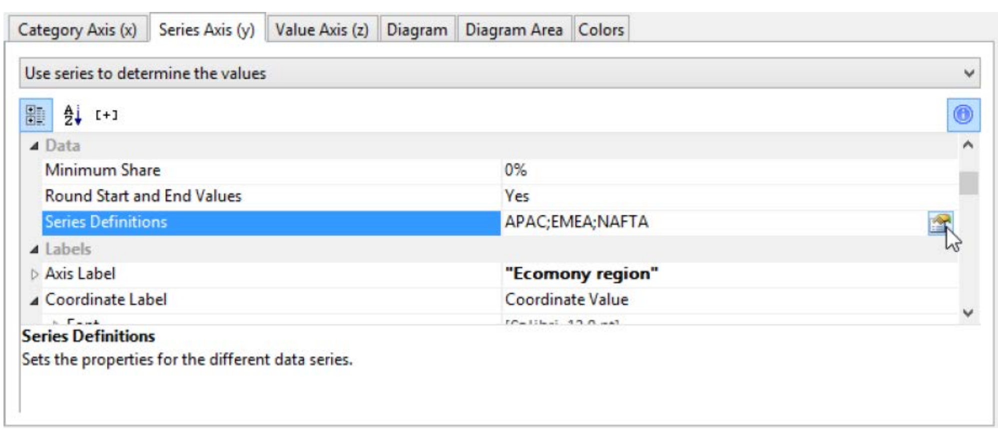
Proceed as follows in the Sample Application:

1. Select the "Sales" table as the data source.

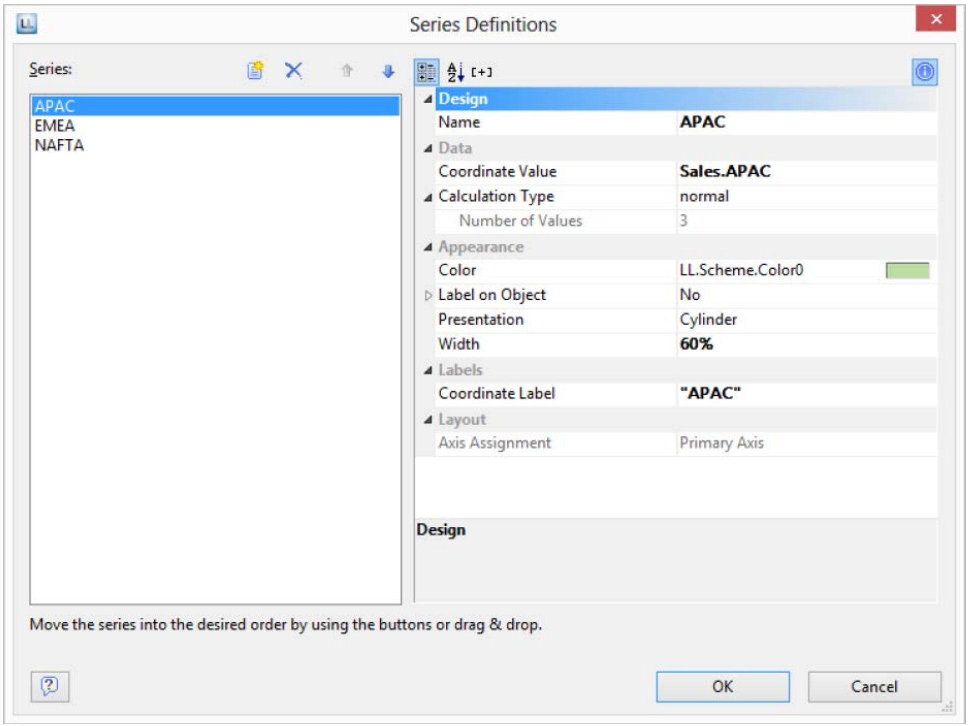
2. Choose Bar/Ribbon > 100% stacked as the diagram type.

3. First specify the coordinate values for the category axis, i.e., the values of the x-axis. Select the "Sales.Year" field with the formula wizard. Remove the 2 decimal places using the "Str$(Sales.Year,0,0)" formula.

4. Now specify the coordinate values for the series axis, i.e., the values of the y-axis. Select the "Use rows as data source" entry from the drop-down list above the properties.



This option changes the properties of the series axis and displays a dialog for defining the rows when you click the "Row Definitions" property. Create the individual rows choosing "Sales.APAC", "Sales.EMEA" or "Sales.NAFTA" in each case as the coordinate value.



Mixing Chart Types

You can mix bar charts with line charts. In addition to the ability to display another data series as a line at the same time as the bar chart, you may also make use of the calculation options such as moving averages and aggregation options. This will allow you to see total turnover, trends in the data, or outliers (both upwards and downwards) at a glance.

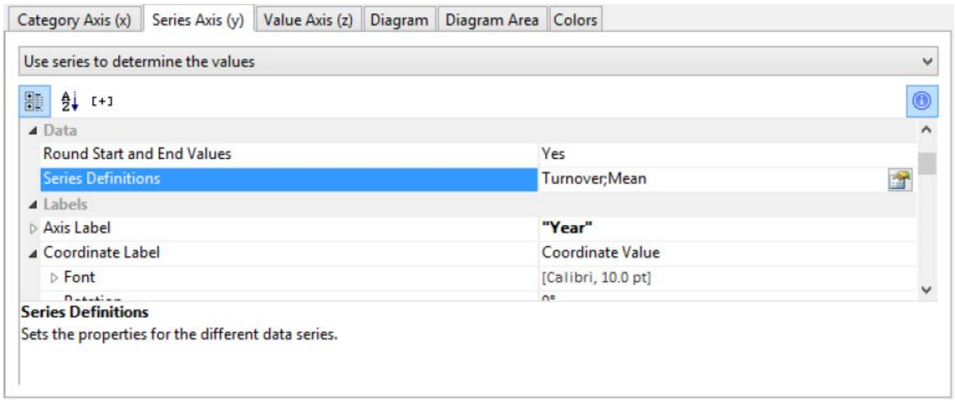
Example: Combining a straight line mean with a bar chart (turnover for each country)

1. Select the table "Customers > Orders > Order Details" as the data source.

2. As the diagram type, select Bar/Ribbon > Clustered

3. First, define the coordinate value of the category axis. Use the formula assistant to select the field "Customers.Country".

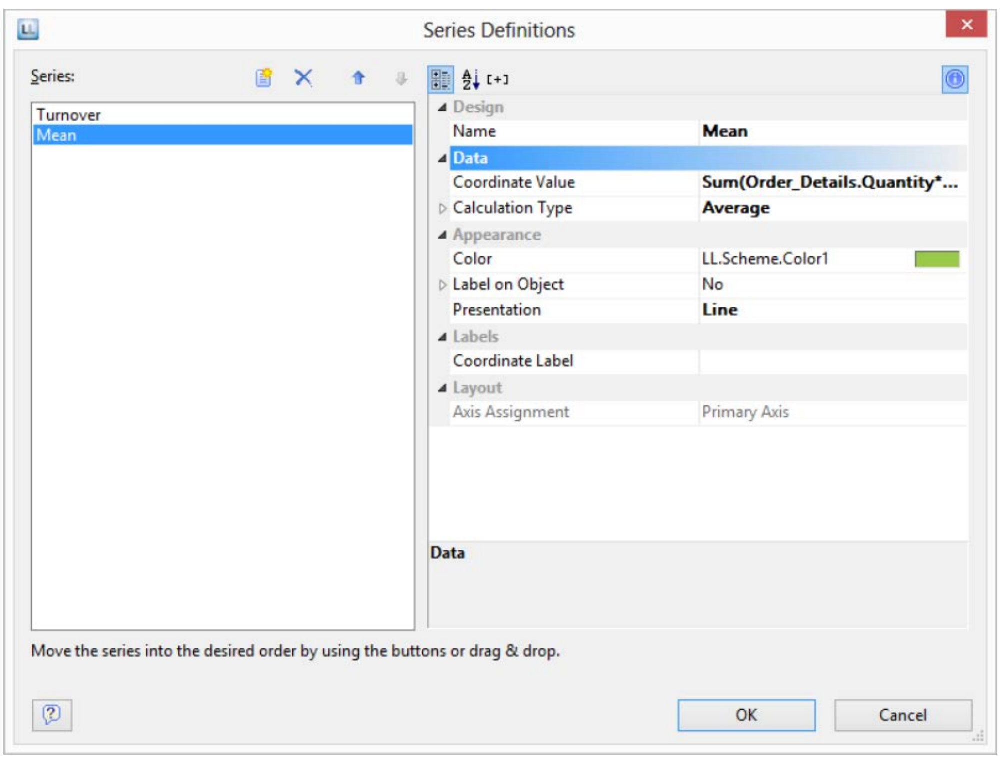
   Now define the coordinate value of the series axis. Use the combo box above the property list to select the entry "Use series to determine the values".



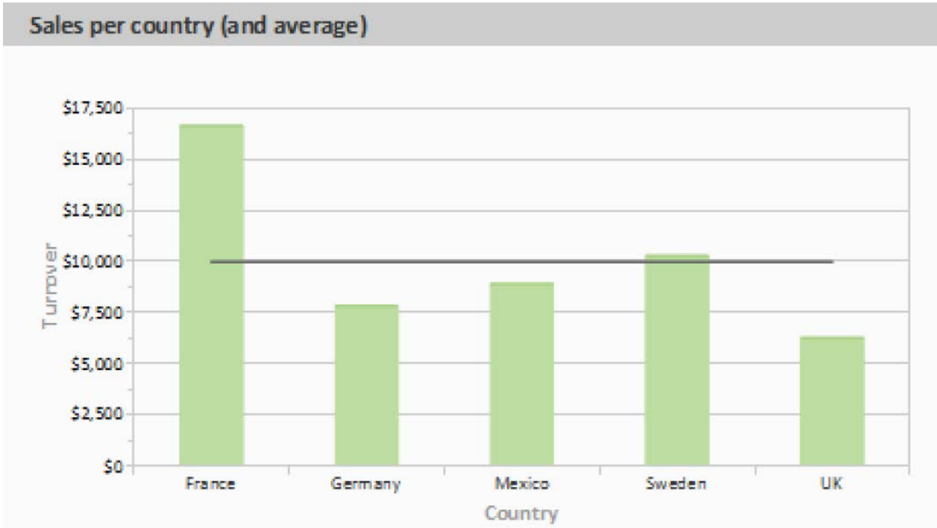
By doing this, the properties of the series axes change and a dialog appears for the property "Series Definitions" for the definition of the series.

4. Define a new series "Single Turnover" and calculate the turnover using the formula "Sum(Order_Details.Quantity * Order_Details.UnitPrice)" with the calculation type "normal" and display type "Cylinder".

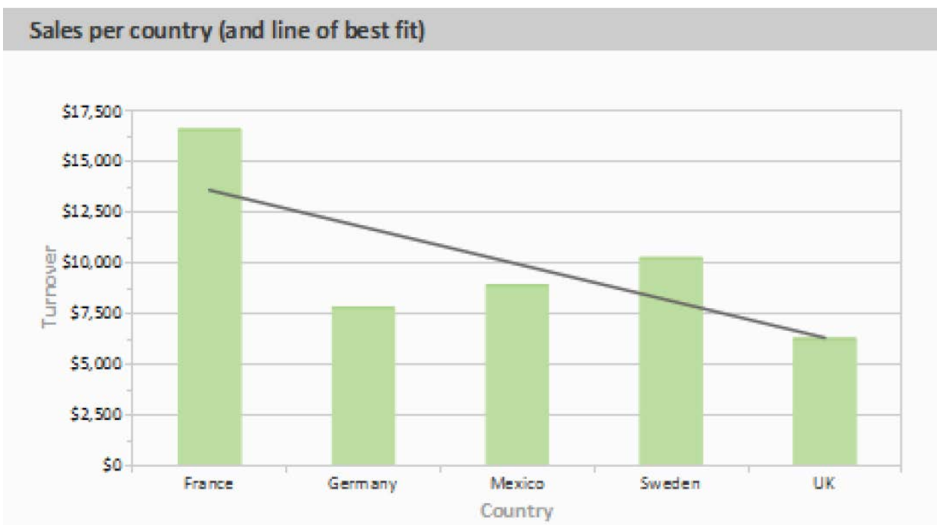
5. Define another series named "Mean" and calculate the turnover using the formula "Sum(Order_Details.Quantity * Order_Details.UnitPrice)" with the calculation type "Average" and display type "Line".



6. The result is a turnover analysis with a mean line.



7. When using the calculation type "Line of best fit", a trend line will be displayed:



Create a Crosstab

Crosstabs are used for evaluating and presenting data in multiple dimensions. Crosstabs (or contingency tables) are tables containing information about the frequency of the occurrence of combinations of certain characteristics.

These frequencies are extended by their marginal totals which form "contingencies." With a three-dimensional crosstab, (three characteristics), the table includes an additional column grouping.

For example, you can examine turnover trends per year and region, evaluating sales according to quantities and customers, and create marginal totals for quarters and years.

A normal ("flat") table has the attribute names in the first row and the occurrences of these attributes in all other rows. A crosstab is different. The titles of both columns and rows receive characteristic occurrences and, at the point of intersection of the respective column and row, a value is shown that depends on the characteristics specified for the column and row in each case.

Customer turnover per year and quarter

	2008		2009				2010		Total
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	
Germany					1,086	1,208	851	491	3636
Mexico		492		3,038	2,562	1,277		514	7883
Sweden	2,102		3,429						5531
UK		480	1,352		2,143	1,704			5679
Total	2102	972	4781	3038	5791	4189	851	1006	22729

For the schematic presentation of two-dimensional crosstabs, the 3D multi-row bar chart is the best choice.

Create a Crosstab Object

Let's assume that you want to examine the development of turnover per year, quarter and country. Proceed as follows in the Sample Application:

1. Crosstabs are elements in the report container. Therefore, you add these objects in the "Report Structure" tool window. If you have not yet added a report container to the workspace, select Insert > Report Container (Objects > Insert > Report Container) and pull the object to the right size in the workspace while holding down the left mouse button.

2. A selection dialog will appear for the chosen element type. Choose the "Crosstab" element type.

3. In the following dialog, now select the data source. All available tables are shown hierarchically, in other words, under the tables you will find the related tables in each case.

   For our turnover analysis, e.g., choose the "Customers > Orders > Order Details" table so that you have all three tables at your disposal. The "Customers" table contains the country, the "Orders" table the order date and the "Order Details" table the turnover.

4. A wizard appears which will lead you through the 3 configuration dialogs for crosstabs.

Define Groupings

In the wizard's first dialog, or alternatively on the "Axis Definition" tab, you first define the grouping for the rows and columns, i.e., the characteristics.

1. In the "Rows" pane, click on the "Insert a row grouping" button.

2. In the formula wizard, you now enter the field or the expression for the row grouping e.g., Customers.Country. You have now created a row grouping and the data will be grouped by this characteristic.

3. In the "Columns" pane, click on the "Insert a column grouping" button.

4. In the formula wizard, you now enter the field or the expression for the column grouping.

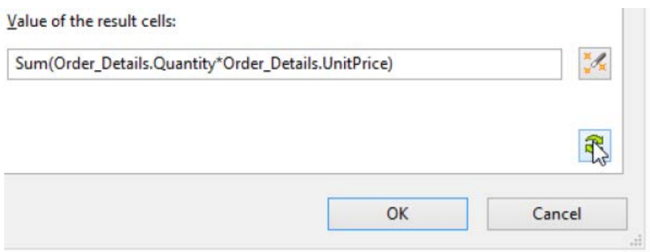
5. Since you first want to group the data by year, you must enter an expression here that returns the year of the order date. You have the Year() function in the formula wizard at your disposal; i.e., you select this function from the list and insert the order date as the parameter by double-clicking. The formula looks like this: Year(Orders.OrderDate).

6. Since we also want to examine the data at another level, insert an additional column grouping via the "Insert a column grouping" button.

7. Now enter an expression to return the quarter of the order date. You can use the Quarter() function in the formula wizard for this. The formula then looks like this: Quarter(Orders.OrderDate).

Note: You can change the order of the groupings with the arrow button. The column at the bottom is the inner grouping.

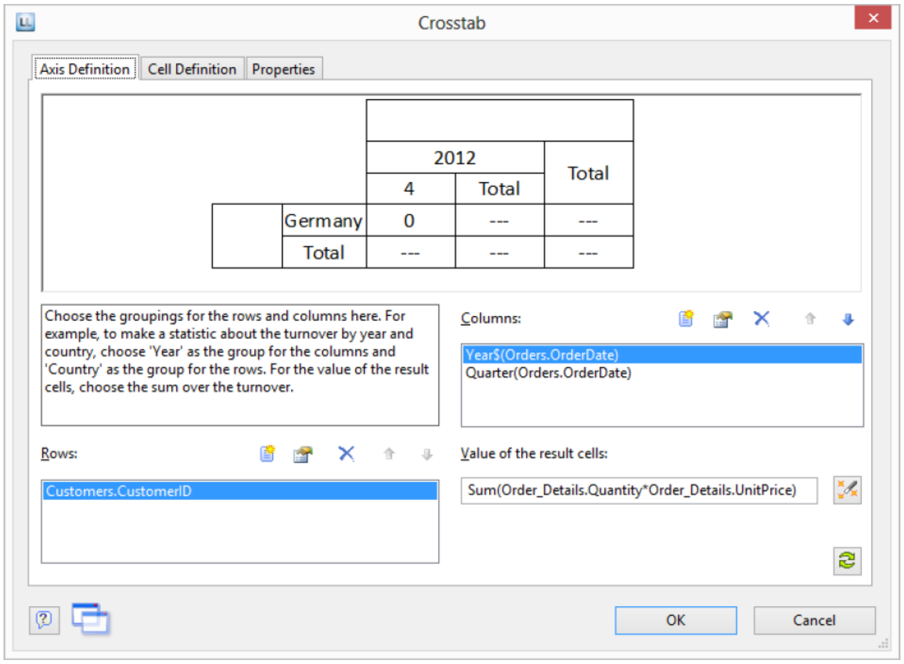
To swap lines and rows (Pivot function) use the button on the lower right on the "Axis Definition" tab. This button is only available in the object dialog, not in the wizard.



8. You have now created the groupings and you can go on to define the value for the intersection of the respective columns and rows. Click on the "Edit group result formula" button located under "Value of the result cells".

9. Now select the aggregate function that you want for the contents in the "Cell Contents" dialog that appears. You want to create a sales evaluation so choose the "Sum" function. In the upper part of the dialog, you can specify the contents by clicking the formula button to start the formula wizard.

10. In the Sample Application, the sales per order value is not supplied directly as a field so you must calculate it using the "Sum(Order_Details.Quantity * Order_Details.UnitPrice)" formula.



Define Cell Properties

In the wizard's second dialog or, alternatively, on the "Cell Definition" tab, you edit the properties of the different cells.

You can select the cells directly in the drawing in the upper pane of the dialog and then edit their properties. To select multiple cells, hold down the CTRL key or you can draw a border around the cells with the mouse.

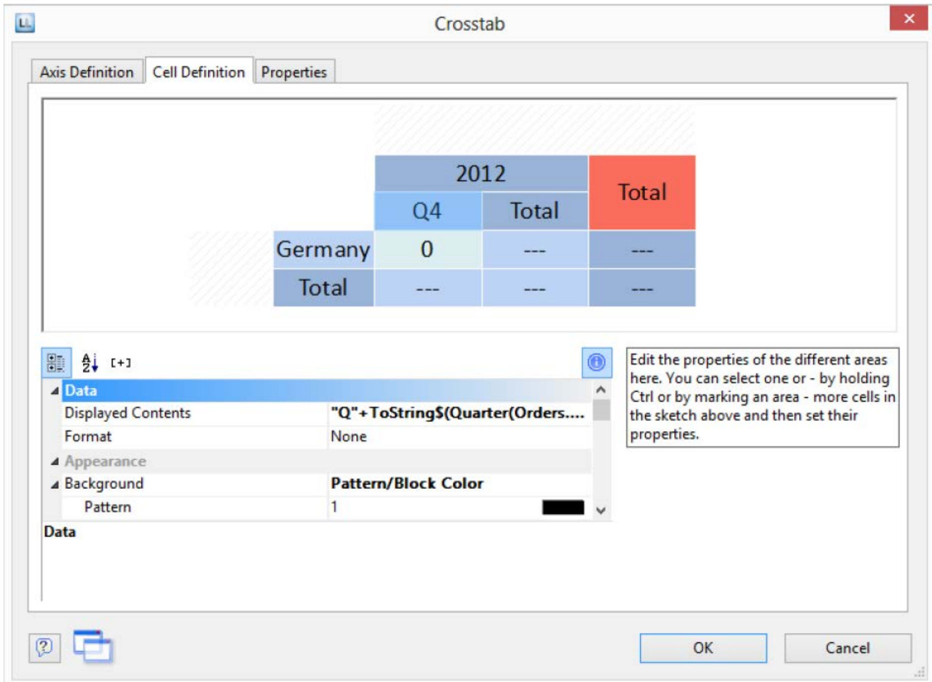
1. Let's assume that the countries shouldn't be listed alphabetically but descending by turnover. Select the corresponding line header (here: Germany) and select the value "Result Descending" in the property "Sort Order" then. In combination with the property "Limit To" you will get a Top-N analysis by that.

2. Assuming that you want to prefix the number of the quarter with a "Q" as the title of a column. Select the respective column title and then double-click on the "Displayed Contents" property.

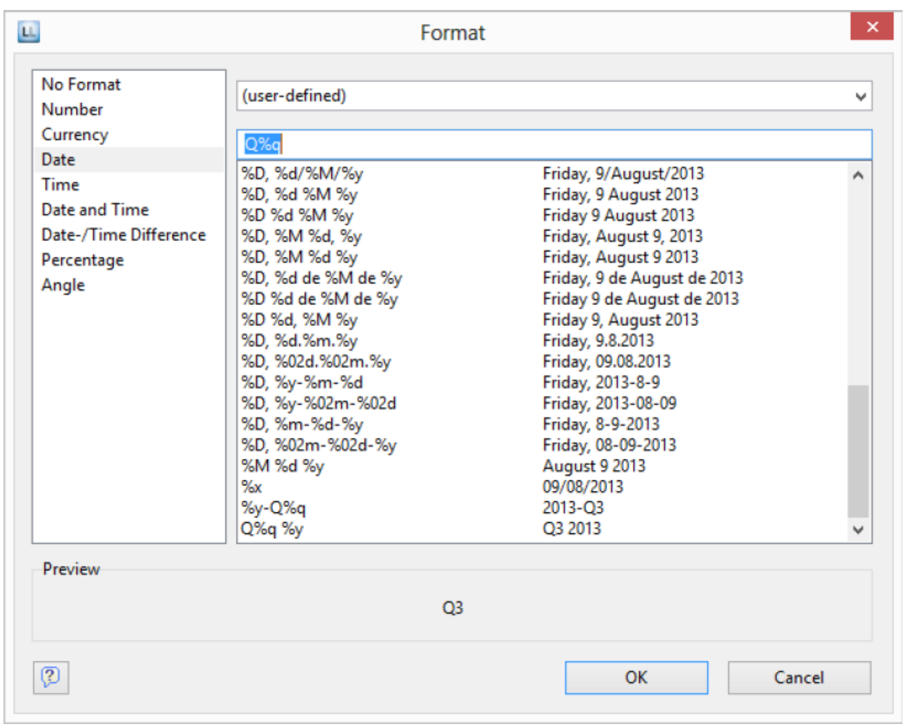
   With this property, you can now specify the text that is to be displayed in this cell (independent of the value that you have defined for this column grouping).

   Now define either a suitable formula, e.g., "Q" + Str$(Quarter(Orders.OrderDate)) in the formula wizard

3. Alternatively use the "Format" property. Then remove the "Quarter$()" here, i.e., only the date field remains in the field, and format the value by means of the property.



To do this, click the "Formatting" property, choose "Date" as the formatting type, and finally select the "User-defined" entry from the drop-down list. At the end of the list you will find an example for formatting a quarter plus the number of the year. Since we don't need the number of the year, shorten the formula's string to "Q%q".



4. This cell is now formatted and you can go on to format all other cells in the same way. Various properties are available including:

- Rotation of the content in increments of 90°
- Background
- Frame
- Font
- Vertical and horizontal alignment
- Maximum width, minimum width and minimum height

The Layout Option and Wrapping Behavior

In the wizard's third dialog or, alternatively, on the "Properties" tab, you edit the layout properties and specify the wrapping behavior.

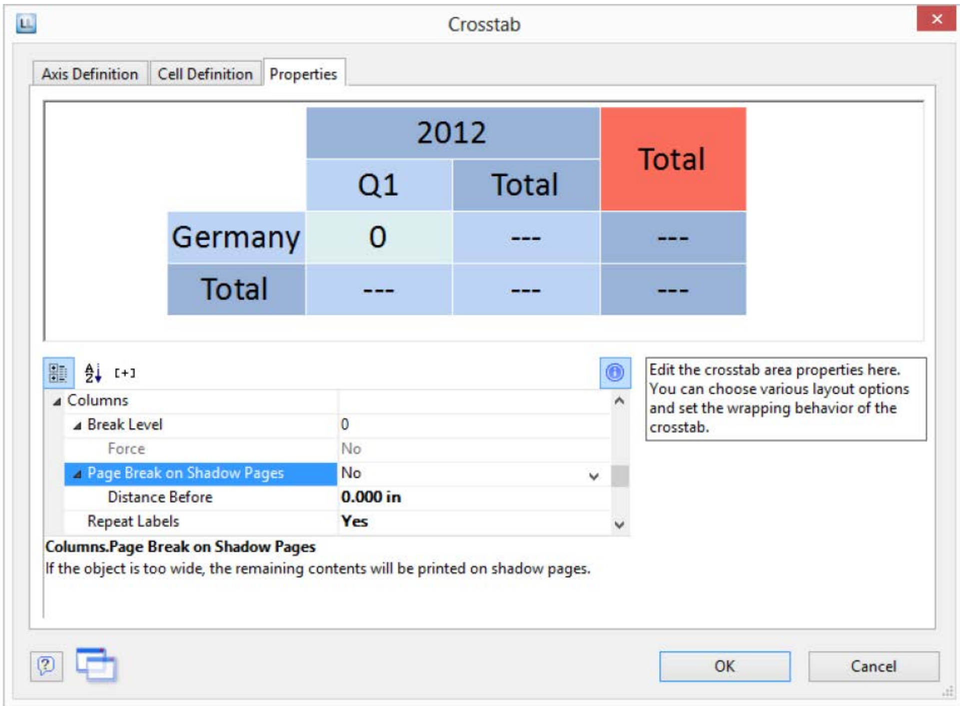
Various layout properties are available including:

- Background
- Default frame
- Minimum size (%) and minimum height

In addition, as crosstabs are often wider and higher than the specified page format, you can also specify the wrapping behavior for columns and rows. It creates as many pages (shadow pages) as necessary. The row labels are repeated on all pages as standard while the column labels are not repeated.

Various wrapping properties are available including:

- Repeat Labels: Specifies whether the labels of columns or rows are to be printed again in the case of a page break.
- Break Level: Specifies the optimum break level, e.g., "0". This corresponds to the lowest group, i.e., the quarter.
- Column > Page Break on Shadow Pages: If the cross table is too wide, the wrapped parts are printed on shadow pages. A shadow page does not count as a "real" page and therefore does not have a page number. The default setting specifies that the wrapped parts are to be output below the table.



Special Functions

Various additional functions are available in crosstabs including:

- Crosstab.Value() returns the content of the cell (as a value).
- Crosstab.Cells.Avg() returns the average value of the volume of data.
- Crosstab.Col$() or Crosstab.Row$() returns the description of the column or the row for the current cell.

  With this, you can, for example, assign a particular color to the background of a column or row. The following example sets the background color to orange for all cells in a row where the cell descriptor is "Germany":

  Cond(Crosstab.Row$()="Germany",LL.Color.Orange,LL.Color.White)

Customer turnover per year and quarter

	2008		2009				2010		Total
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	
Germany					1,086	1,208	851	491	3636
Mexico		492		3,038	2,562	1,277		514	7883
Sweden	2,102		3,429						5531
UK		480	1,352		2,143	1,704			5679
Total	2102	972	4781	3038	5791	4189	851	1006	22729

- Crosstab.Cells.Max() or Crosstab.Cells.Min() returns the largest or smallest value in the entire crosstab. With this, you can, for example, emphasize the largest or smallest value of the volume of data or perform calculations. The following example sets the background color of the cell with the largest value to green:

Cond(Crosstab.Value=Crosstab.Cells.Max(),LL.Color.Green,

Cond(Crosstab.Row$()="Germany",LL.Color.Orange,LL.Color.White))

Customer turnover per year and quarter

	2008		2009				2010		Total
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	
Germany					1,086	1,208	851	491	3636
Mexico		492		3,038	2,562	1,277		514	7883
Sweden	2,102		3,429						5531
UK		480	1,352		2,143	1,704			5679
Total	2102	972	4781	3038	5791	4189	851	1006	22729

- Crosstab.Col() or Crosstab.Row() returns the index of the column or the row for the current cell. Here, for example, you can set the background color of alternate rows thereby producing a zebra pattern. Example:
  Cond(Odd(Crosstab.Row()),LL.Color.LightGray,LL.Color.White)

Customer turnover per year and quarter

	2008		2009				2010		Total
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	
Germany					1,086	1,208	851	491	3636
Mexico		492		3,038	2,562	1,277		514	7883
Sweden	2,102		3,429						5531
UK		480	1,352		2,143	1,704			5679
Total	2102	972	4781	3038	5791	4189	851	1006	22729

- Join$() returns a collection of strings, separated by a particular character. For example, you can output the individual turnover amounts in addition to the total turnover. Example:

Fstr$(Sum(Order_Details.Quantity*Order_Details.UnitPrice),"-##,###,###") + "¶["+
Join$(Fstr$(Sum(Order_Details.Quantity*Order_Details.UnitPrice),"-##,###,###"))+"]"

Customer turnover per year and quarter

	2008		2009				2010		Total
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	
Germany					1,086 [684; 1,062; 1,086]	1,208 [878; 938; 1,208]	851 [825; 851]	491 [400; 491]	3636
Mexico		492 [29; 89; 492]		3,038 [690; 881; 1,931; 2,115; 2,213; 3,038]	2,562 [70; 140; 480; 1,182; 1,742; 2,562]	1,277 [320; 1,257; 1,277]		514 [42; 102; 166; 514]	7883
Sweden	2,102 [248; 908; 1,189; 1,489; 1,532; 1,916; 2,102]		3,429 [1,814; 2,222; 2,534; 2,908; 3,023; 3,254; 3,341; 3,429]						5531
UK		480 [90; 480]	1,352 [96; 291; 899; 1,052; 1,352]		2,143 [238; 1,298; 1,508; 2,098; 2,143]	1,704 [504; 1,284; 1,704]			5679
Total	2102	972	4781	3038	5791	4189	851	1006	22729

- You can use Total() for calculations across all cells. Otherwise, calculations are always made across all values that affect the respective cell.

Gateway

All new electronically submitted reports flow through the Gateway. It serves as an inbox, where designated **Gateway Administrators** and **Gateway Approvers** assess each electronic report before accepting it into Perspective or deleting it from the system.

Electronic reports in the Gateway can be submitted from a number of sources. If your organization uses **Perspective e-Reporting** or **Portal**, Incident reports may be submitted from a workgroup's e-Reporting Web page. Otherwise, Incident, Item, Person, Organization, and Vehicle reports may be imported using Perspective's built-in **Import Manager**. Imports may originate from a computer, Web site, PDA, mobile phone, or any electronic medium that enables creation and transfer of files in XML format.

Once the Gateway Administrator and Gateway Approver have been granted appropriate user rights by the System Administrator, they will have access to the Gateway and the electronic reports stored in it. Their respective roles involve the authority to review these reports and perform their associated functions.

Gateway Administrator and Gateway Approver both can:
Edit Incident reports (or e-Incidents).
View imported Item, Person, Organization, or Vehicle reports.
Make the imported reports available for authorized users to add to the Perspective database.
Delete the imported reports from the system.

Only Gateway Administrator can:	Only Gateway Approver can:
Assign e-Incidents to the Gateway Approver for follow-up.	Accept e-Incidents into Perspective as valid incidents.
Delete e-Incidents from the system.	Send e-Incidents back to the Gateway Administrator for reassignment.
	Store e-Incidents in a Pending folder for review at a later date, if they contain insufficient information to accept or reject them.

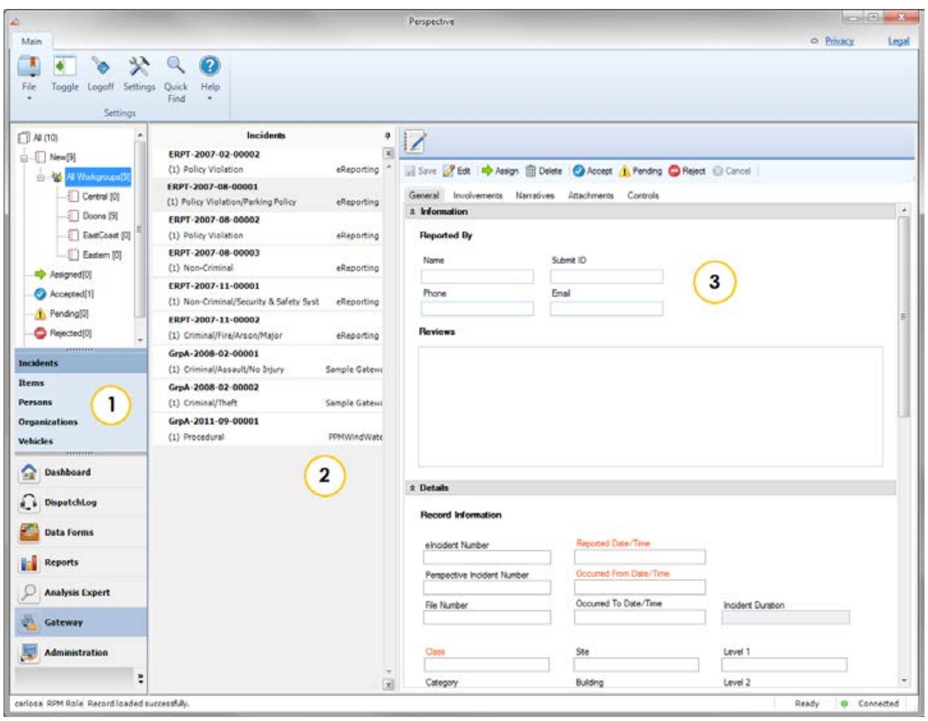
User Interface

The Gateway interface is divided into three sections:

1. **Navigation pane:** Allows you to move between various types of Gateway electronic reports corresponding to the major Data Forms (i.e., Incidents, Items, Persons, Organizations, and Vehicles). To display folders containing reports for a particular Gateway report type (i.e., New, Assigned, Accepted, Pending, Rejected, and Deleted for Incidents; and New, Available, Added, and Deleted for Items, Persons, Organizations, and Vehicles), choose the required banner from the Navigation pane. Click on a folder in the Navigation pane to see all the reports contained within it listed in the Listing pane. If more than one workgroup's electronic reports are contained in the folder, subfolders for the appropriate workgroups will be listed beneath the folder name in the Navigation pane. Expand the **All Workgroups** subfolder and select a workgroup to see only its particular reports in the Listing pane.

2. **Listing pane:** Provides a list of electronic reports selected in the Navigation pane for viewing. On the right side of every report entry the system records a corresponding source of a report's import (e.g., e-Reporting). Once you select an e-Report in the Listing pane, the report's contents will be displayed in the Viewing pane on the right. (For Incident e-Reports, the submitted XML data is saved under the Attachments tab.)

3. **Viewing pane:** Displays the contents of an e-Report selected in the Listing pane and provides options for saving, editing, assigning, deleting, accepting, rejecting, and closing individual reports, as well as transferring them into Available or Pending modes and viewing their XML versions. Every Incident report consists of a set of tabs (i.e., General, Involvements, Narratives, Attachments, Controls, and Audit History), while data for every Item, Person, Organization, and Vehicle report is provided on one simple form.



Note: If a folder in the Navigation pane contains more than 1000 e-Reports, you must first filter the report list before viewing it in the Listing pane. Once you click on the folder in the Navigation pane, a pop-up window will appear allowing you to filter the e-Incident list.

To display the top 1000 e-Reports (based on the reports' identification numbers), click **Start Search**. Click OK to transfer the list to the Listing pane.

To search for a particular e-Report or a set of e-Reports, set specific filtering criteria:

1. In the **Field Name** lookup list, select the field that you want to set as the main criterion for narrowing your e-Report list.

2. Choose an **Operator** for the field (e.g., Equal, Not Equal, After, Begins With, Like, etc.).

3. Enter the compared criterion **Value**. If the **Selector** button is available, click it to display a tree of Value options in a separate window. Note that you may choose any node of the tree as the defining criterion, making your comparison value as narrow hierarchically as you want.

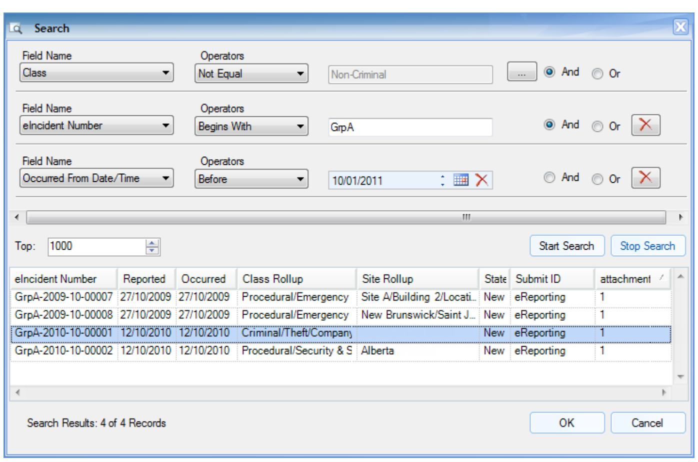
4. If you want to include a second field as an additional filtering criterion, select the **And** or **Or** radio buttons and complete the Field Name, Operator and Value fields below. You may add as many filtering criteria as you want. To remove a field from your filtering criteria, click the **Delete** button.

5. By default, only the top 1000 reports matching the criteria that you set will be displayed. To display more or less, adjust the number in the **Top** field (from 1 to 2000).

6. Click **Start Search** to generate a list of reports matching your filtering criteria. A count of the number of e-Reports in the list, as well as the total number of e-Reports matching your filtering criteria, will be displayed at the bottom of the window.

7. To make changes to the ongoing search, click **Stop Search** first, and then make the necessary changes to the filtering criteria.

8. When you are satisfied with the list of e-Reports displayed, click **OK** to transfer the list to the Listing pane in the Gateway.



Incidents

Under the Incidents banner, the following folders will be displayed:

- ***New***: New e-Incidents that have not yet been assessed.
- ***Assigned***: e-Incidents assessed and assigned to a Gateway Approver for follow-up.
- ***Accepted***: e-Incidents that have been accepted into Perspective as valid Incident records by the Gateway Approver assigned to them (the only e-Incidents not available for editing).
- ***Pending***: e-Incidents that require further information before being assigned or deleted.
- ***Rejected***: e-Incidents that have been returned to the Gateway Administrator by the Gateway Approver.
- ***Deleted***: e-Incidents that have been marked for deletion upon purge. These can be re-assigned by the Gateway Administrator before the purge occurs.

Note: Not all folders will be visible to the Gateway Approver.

After selecting an e-Report in the Incidents Listing pane of the **New** folder, you can use the buttons available on the Viewing pane toolbar to perform a number of report functions.

Common functions available for both Gateway Administrator and Gateway Approver:

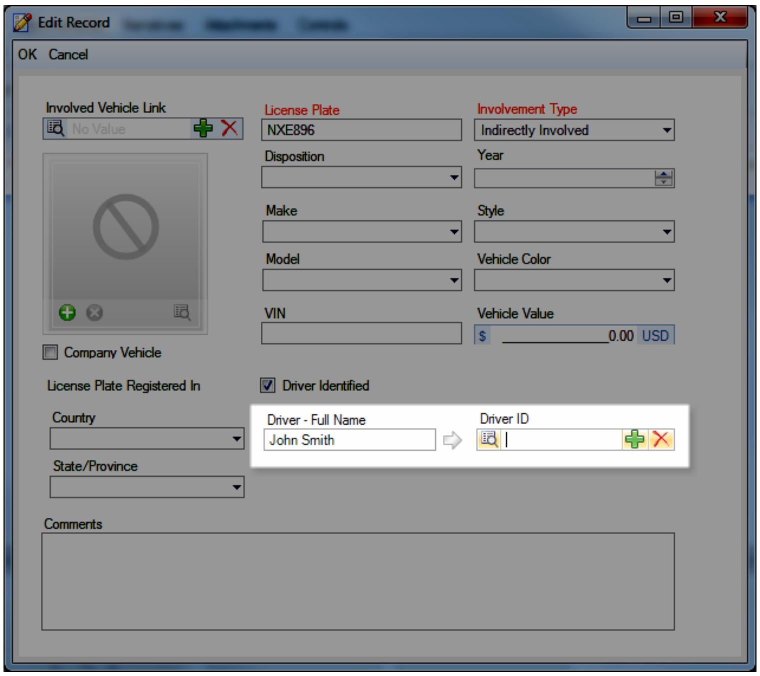
Save	Preserves the changes you made to an e-Report.
Edit	Transfers an editable e-Report into the editing mode. After clicking Edit, select the field you want to edit and make the necessary change. Editing of e-Reports functions similarly to the data entry in Incidents data forms, including the use of a similar set of sub-tabbed toolbar functions, like **Edit**, **Add New**, **Remove** and **Read/View**. Remember to complete every report editing action with saving the changes applied to the report by clicking **Save** on the Viewing pane toolbar. *Note: For further details on the sections of the e-Incident report and functions performed by the toolbar functions that are available for certain sub-tabs (i.e., Involved Persons, Organizations, Vehicles, and Items), see the "Incidents" and "Common Record Functions" chapters.* *Note: The only editing function that is exclusively under the authority of the **Gateway Administrator** is setting of the e-Incident's security controls in the **Controls** tab (access level, organizational rollup and workgroup visibility). Although the e-Incident will have some default security controls, the Gateway Administrator may choose to re-set these in order to restrict both the Gateway Approver the e-Incident is assigned to (the Approver's access rights must match*

	those of the e-Incident in order to assess it), as well as users who have access to the record within Perspective if it is accepted as a valid Incident record.
Close	Exits the e-Report without saving changes.
Functions available for Gateway Administrator only:	
Assign	Assigns the e-Incident to the Gateway Approver for further review by transferring the e-Incident to the **Assigned** folder. Once you click the Assign button, a pop-up confirmation window will appear. Make any necessary notes on the assignment of this e-Incident in the **Comments** text box. Your notes will appear in the Reviews section of the e-Incident under the General tab. Click **Assign** to confirm your choice. *Note: The **Gateway Approver's access rights** must match those designated under the e-Incident's Controls tab.*
Delete	Deletes an e-Incident as an invalid submission by transferring the e-Incident to the **Deleted** folder. Once you click the Delete button, a pop-up confirmation window will appear. Make any necessary notes on the deletion of this e-Incident in the **Comments** text box. Your notes will appear in the Reviews section of the e-Incident under the General tab. Click **Delete** to confirm your choice. *Note: e-Incident can be recovered anytime prior to the end of **Deleted Retention Period** specified for the e-Incident's workgroup by the System Administrator.*
Functions available for Gateway Approver only:	
Accept	Accepts an e-Incident into Perspective as a valid Incident record, by transferring it to the **Accepted** folder. The accepted e-Incident will be available to users whose access rights match those designated under the e-Incident's Controls tab. Once you click the Accept button, a pop-up confirmation window will appear. Make any necessary notes on the acceptance of this e-Incident in the **Comments** text box. Your notes will appear in the Reviews section of the e-Incident under the General tab. Click **Accept** to confirm your choice. A dialog box will appear displaying the e-Incident's *new* **Perspective Incident Number**. For cross-referencing purposes, both the original **e-Incident Number** (e.g., INC-2010-000269) and the new **Incident Number** (e.g., EINC-2010-12-

	00001) will appear under the Record Information in the General tab of both the e-Incident record and the actual Incident data form. Click **OK**. *Note: The accepted e-Incident will be purged from the Gateway at the end of the **Accepted Retention Period** specified for the e-Incident's workgroup by the System Administrator. The original e-Incident form will remain in Perspective as an attachment to the newly created Perspective Incident record.*
Reject	Sends an e-Incident back to the Gateway Administrator for further review by transferring it to the **Rejected** folder, so that it could be re-assigned or deleted. Once you click the Reject button, a pop-up confirmation window will appear. Make any necessary notes on the rejection of this e-Incident in the **Comments** text box. Your notes will appear in the Reviews section of the e-Incident under the General tab. Click **Reject** to confirm your choice. To evaluate the reasons for the e-Incident's rejection by the Gateway Approver, edit the e-Incident, and/or delete or assign it again, the **Gateway Administrator** hat to access the rejected e-Incident from the Rejected folder.
Pending	Sets an e-Incident to Pending status, by storing it in the **Pending** folder. This function is used when there is insufficient information to accept or reject the e-Incident, and the Gateway Approver intends to make its review at a later date. Once you click the Pending button, a pop-up confirmation window will appear. Make any necessary notes on the pending of this e-Incident in the **Comments** text box. Your notes will appear in the Reviews section of the e-Incident under the General tab. Click **Pend** to confirm your choice.

When an incident is submitted using e-Reporting or Portal, you must manually link the name of the driver (Vehicles), supervisor (Incident General), notified by person (Organizations), or the owner, person, or organization (Items), in Gateway. This is done by clicking the **plus** icon . Then, select the corresponding record from the pick list. If a record does not already exist, use the Quick Add function to create one.

Note: If this is not done before acceptance to Perspective, the information will not get transferred into Perspective.



Items, Persons, Organizations and Vehicles

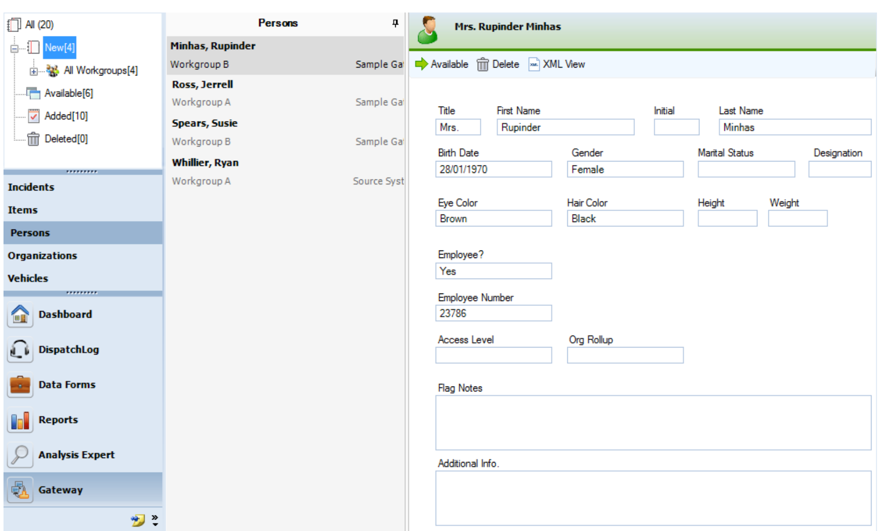
Note: Item, Person, Organization, and Vehicle reports can only be imported to the Gateway using the Import Manager.

To view imported Item, Person, Organization, or Vehicle reports, click on the appropriate banner in the Navigation pane. The following folders will be displayed:

- ***New***: New imported reports that have not yet been assessed.
- ***Available***: Imported reports that have been deemed valid, and made available for authorized users to add to the Perspective database.
- ***Added***: Imported reports that were first made available within Perspective, and then added by authorized users to the database as valid Item, Person, Organization, or Vehicle records.
- ***Deleted***: Imported reports that have been marked for deletion upon purge. These can be made available for adding to the database before the purge occurs.

After selecting an e-Report in the appropriate Listing pane of the **New** folder, you can use the buttons available on the Viewing pane toolbar to perform the three basic report functions that are available for both the Gateway Administrator and the Gateway Approver.

Available	Makes a report available for authorized users to add to the Perspective database, while transferring it to the **Available** folder. If an authorized user chooses to add a new record to one of the Data Forms components, the data in the added report will be displayed as available for adding. Simultaneously, the report will be moved from the Available folder to the **Added** folder. At the end of the **Added Retention Period** specified for the report’s workgroup by the System Administrator, the imported report will be purged from the Gateway. However, the **original XML report** will remain in Perspective as an attachment to the newly created Perspective Item, Person, Organization, or Vehicle record.
Delete	Deletes a report from the Gateway as invalid. Once you click the Delete button, a pop-up confirmation window will appear. Choose the **Mark As Delete** radio button to store the imported report in the **Deleted** folder, where it can be recovered at any time prior to the end of the **Deleted Retention Period** specified for the report’s workgroup by the System Administrator. Otherwise, choose the **Immediate Delete** radio button to permanently delete the report. Click **Delete** to confirm your choice.
XML View	Displays the imported report in its original XML format including hidden data, if available. Click the XML View button again to return to the standard view.



Note: When an incident is in the Gateway

Perspective DispatchLog

Welcome to Perspective DispatchLog™, a component of both the Perspective SOC and Perspective EIM Editions. DispatchLog provides a wide range of powerful dispatching functions. Combined with Perspective, DispatchLog embodies one of the most sophisticated and efficient cost-based dispatching and activity tracking methods. The DispatchLog console enables Security Departments to quickly create activities and dispatch personnel and agencies, while the Activity component in Perspective stores closed records of dispatched activities for further description and analysis.

As calls come in, you can use DispatchLog to complete the following important dispatching tasks:

- Easily track the category, priority, location, and timing of activities;
- Document officer and organization responses to and action requests for activities;
- Add persons, organizations, vehicles, and items involved in activities;
- Attach supplementary files to the current activities and log timely activity notes;
- Give activity-related assignments to other users;
- Bring officers on and off duty;
- Quickly dispatch officers and organizations to the current activities;
- Keep up-to-the-minute records on your officers' and organizations' activities and location;
- Review interactive lists of Standard Operating Procedures available for the activities' call categories, sites, and/or statuses;
- Send out mass notifications and/or email notifications in relation to activities;
- Clone activities and available officers and organizations;
- Schedule, copy, and implement future activities;
- Close activities.

As you close an activity in DispatchLog, it is transferred to the Activities section of the Data Forms in Perspective under its original Activity Number. The Activities component provides functionality to create new Activity records from scratch, as well as to efficiently maintain and monitor existing Activity records. In addition to the options provided in DispatchLog, in Perspective you can:

- Create new activities post factum and edit closed activities transferred from DispatchLog;
- Link an Activity record to another Activity or an Incident record;
- Refine records' control and workgroup visibility options;

- Review the sent mass and email notifications;
- Audit changes made to a record;
- Escalate activities to Incident records for investigation.

Note: Updates to the program, as well as variations in the operating system, may result in slight discrepancies between the illustrations in the guide and what you may see on your monitor.

Access Perspective DispatchLog

The DispatchLog module is built into Perspective's user interface. To start dispatching, log into Perspective and click on the **DispatchLog** banner located on the bottom Navigation toolbar along with the rest of the Perspective's components. A separate DispatchLog window will open with lists of the current and scheduled activities, available and assigned officers, and assigned organizations.

User Interface

The user interface of Perspective DispatchLog is determined by the following three tabs:

- **Start**: Main component where current activity creation, immediate dispatching, and updating of activity details takes place. The toolbar (Ribbon) contains the administrative, control, dispatching, as well as the activity creation, tracking, and manipulation functions **(1)**. The interface of the Start tab consists of the following three interactive panes:

  ***Activities pane* (2)**: Displays a list of all current activities along with their *Activity Number*, *Priority*, *Location*, *Call Category*, *Reported Date/Time*, *Description*, *SOP*, and *Off Site* checkmarks, as well as the *Officer Status* and *Organization Status* of the resources that have last been dispatched for the activity, the *Regulated Time to Act Alert* time bar, and the *Time Remaining* timer. Under the Start tab, the Activities pane only displays activities that are set for today's dispatching.

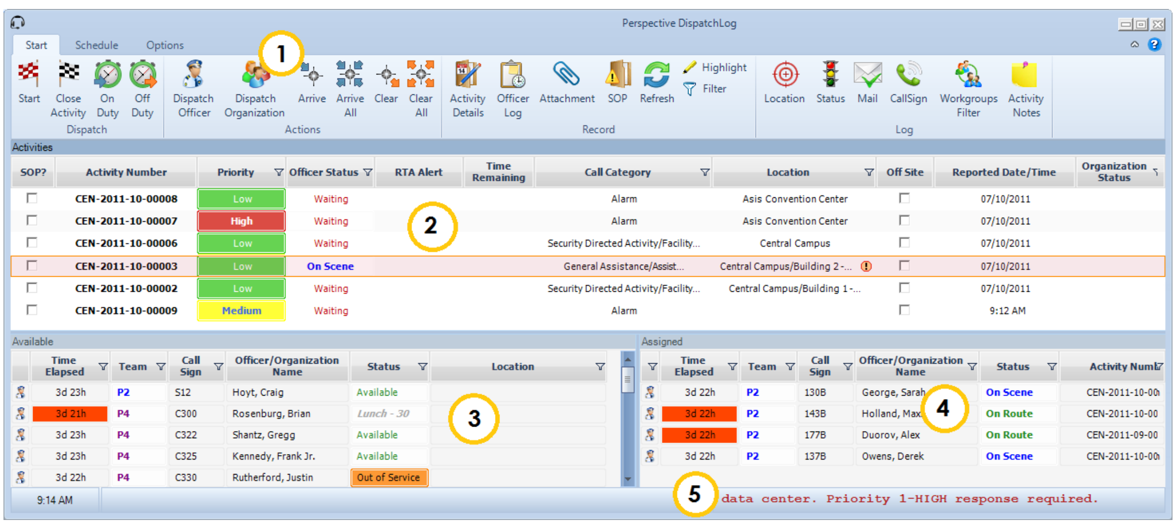
  ***Available pane* (3)**: Displays a list of officers and organizations on duty that are currently available to take on new activities. Along with the *Officer/Organization Name*, the pane displays the resource's current *Location*, *Call Sign* (only for officers), *Team* (only for officers)*, Status*, and the amount of *Time Elapsed* from the time when the current status has been allocated to the resource.

  ***Assigned pane* (4)**: Displays a list of officers and organizations on duty that have been dispatched for the current activities. The data listen on the pane are the same as on the Available pane, with an additional column for the dispatched *Activity Number.*

- **Schedule**: The component of DispatchLog that enables scheduling of new activities for the future with the help of the relevant toolbar functions (i.e., *Add*, *Edit*, *Delete*, *Copy*, *Refresh*, and *Start Now*). The only pane that gets activated under the Schedule tab is the Activities pane that can be populated with new Activity records. The Available and the Assigned panes appear grayed out and inactive. When the scheduled activity's due date and time matches the current date and time, it will automatically get transferred to the current activities list under the Start tab. Otherwise, you may choose to change the date of the dispatch or start the dispatch immediately.

- **Options**: The organizational component of DispatchLog that assists the dispatcher in managing large volumes of dispatch data. All the panes that would typically be active under the Start pane are also fully active here. However, the Options toolbar contains only three functions that perform the Clone Activities, Clone Resources, and Reset View functions. Cloning a pane would enable you to view the available data in separate windows in greater detail, and filter the specific information you want to concentrate on. If required, you may subsequently dock the resulting pane within the Options/Start tabs' interface and locate the referents of additional data contained in the pane on the other panes of DispatchLog.

At the bottom of the DispatchLog screen, you will notice the so-called **Status bar (5)** that contains the clock synchronized with the time set on your computer, and that may display the running text note set for the *Site* of the Activity record that you selected in the Activities pane.



You can build the DispatchLog interface according to your preferences, shifting the position of the panes on the screen, arranging them under tabs, and dragging them out of the dock. To achieve the optimal arrangement of panes within or outside of the window, follow the simple procedures outlined below:

1. Drag the pane to its approximate desired location.

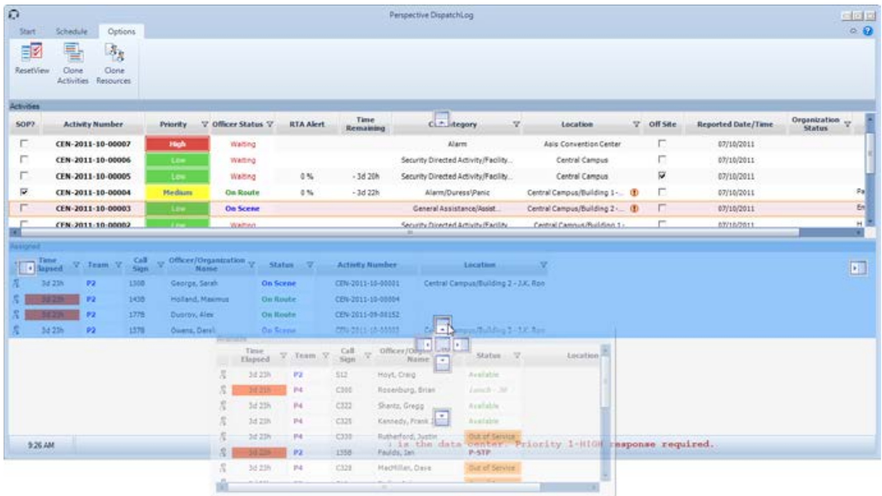
2. Select the exact positioning option from the set of position icons that appear on the screen. As you drag the pane to the icon, the system will mark the corresponding area where the pane will land if you drop it now.

3. If the blue area marks the position you wanted your pane to occupy, drop the pane. If not, drag the pane elsewhere.

4. To drag your pane out of the dock or dock it back into its previous location, double-click it.

5. To reset the arrangement of panes, open the **Options** tab and click the **Reset View** icon.

6. Click **OK** on the pop-up window to confirm the operation.

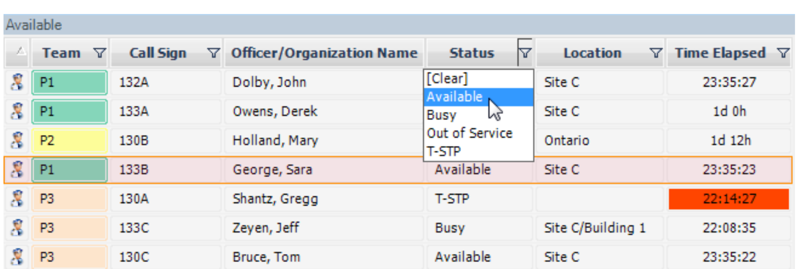


For your convenience, the panes are equipped with multiple filters that can be used to sort out a subgroup of entities that correspond to your desired criterion.

1. To display a subgroup of entities contained in the grid, click the filter icon that appears next to the header of your desired criterion (e.g., Status). A drop-down menu will appear that will list all the available values for the chosen criterion.

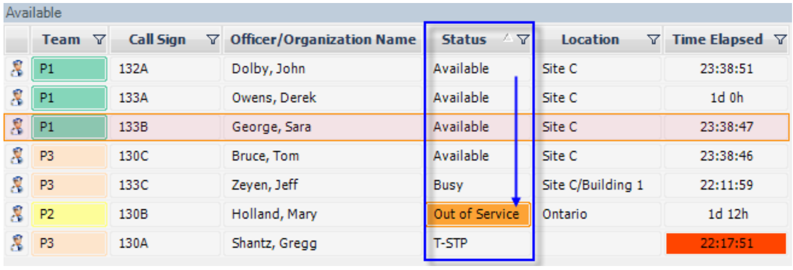
2. Select the specific value of interest for your criterion (e.g., Available). The grid will be automatically reduced to display just the entities that contain the value you selected (i.e., all officers and organizations that are available).

3. To remove the filter, click the corresponding filter icon again and select **[Clear]**.


Available

Team	Call Sign	Officer/Organization Name	Status	Location	Time Elapsed
P1	132A	Dolby, John	[Clear]	Site C	23:35:27
P1	133A	Owens, Derek	Available	Site C	1d 0h
P2	130B	Holland, Mary	Busy / Out of Service	Ontario	1d 12h
P1	133B	George, Sara	T-STP / Available	Site C	23:35:23
P3	130A	Shantz, Gregg	T-STP		22:14:27
P3	133C	Zeyen, Jeff	Busy	Site C/Building 1	22:08:35
P3	130C	Bruce, Tom	Available	Site C	23:35:22

To sort the entities alphabetically based on one of the grid headers, click on the header. The arrow next to the header will indicate the sorting direction (i.e., ascending or descending).



	Team	Call Sign	Officer/Organization Name	Status	Location	Time Elapsed
	P1	132A	Dolby, John	Available	Site C	23:38:51
	P1	133A	Owens, Derek	Available	Site C	1d 0h
	P1	133B	George, Sara	Available	Site C	23:38:47
	P3	130C	Bruce, Tom	Available	Site C	23:38:46
	P3	133C	Zeyen, Jeff	Busy	Site C/Building 1	22:11:59
	P2	130B	Holland, Mary	Out of Service	Ontario	1d 12h
	P3	130A	Shantz, Gregg	T-STP		22:17:51

To update the contents of all the panes with the current state of the entire data set, click the **Refresh** icon located on the top toolbar.

Navigating the program commands

The program commands displayed on the DispatchLog toolbars can be accessed via icons or through keyboard shortcuts. If the function refers to a specific activity/officer/organization, you will first need to select the corresponding entity from one of the panes, and then click the icon or press the required combination of keys.

Icon	Program Command	Selected Entity	Shortcut Key(s)
	Start a new activity	Activity	<Ctrl> + <S>
	Email a basic Activity record	Activity	<Ctrl> + <M>
	Display activity details	Activity	<F6>
	Dispatch an organization	Activity	<Ctrl> + <B>
	Update all officers' and organizations' statuses to "On Scene" for the selected activity	Activity	<Ctrl> + <A>
	Add activity notes	Activity	<Ctrl> + <N>
	Add an attachment to the selected activity	Activity	<Ctrl> + <T>
	Display the associated Standard Operation Procedures	Activity	<Ctrl> + <P>
	Display assigned officers/organizations for the selected activity only	Activity	<Ctrl> + <F>
	Highlight assigned officers/organizations for the selected activity only	Activity	<Ctrl> + <H>
	Display activities filtered by specific workgroup(s)	—	<Ctrl> + <W>

	Clear all officers and organizations from the selected activity	Activity	<Ctrl> + <L>
	Close an activity	Activity	<Ctrl> + <O>
	Bring an officer on duty	—	<F8>
	Dispatch an officer	Available Officer	<Ctrl> + <D>
	Update an officer’s Call Sign	Officer	<Ctrl> + <E>
	Update an officer’s/organization’s Location	Officer/Organization	<Ctrl> + <I>
	Update an officer’s/organization’s Status	Officer/Organization	<Ctrl> + <K>
	Update an officer’s/organization’s Status to “On Scene”	“On Route” Officer/Organization	<F2>
	Clear an officer/organization from the selected activity	Officer/Organization	<F3>
	Bring an officer off duty	Available Officer	<F9>
	Display officer log	Officer/—	<F7>
	Refresh the screens	—	<F5>
—	Delete an activity	(Scheduled) Activity	<F11>
	Add a new scheduled activity	—	<Ctrl> + <1>
	Edit a scheduled activity	Scheduled Activity	<Ctrl> + <2>
	Delete a scheduled activity	Scheduled Activity	<F11> <Ctrl> + <3>
	Copy a scheduled activity	Scheduled Activity	<Ctrl> + <4>
	Transfer a scheduled activity to the current activities list under the Start tab	Scheduled Activity	<Ctrl> + <S>
	Reset the current panels’ layout to default	—	<Ctrl> + <R>
	Clone activities for a separate window display and filtering	—	<Ctrl> + <X>
	Clone resources for a separate window display and filtering	—	<Ctrl> + <U>

Create and Manage an Activity

Start a New Basic Activity Record

1. To start a new current activity, select the **Start** tab.

2. Click the **Start** icon on the toolbar. The blank Activity Details form will open.

3. Select the **Reported Date/Time** for the activity. By default, the field will display the current date and time. If you input a future date or time in the field, the activity will be automatically categorized as a scheduled activity and transferred to the Schedule tab upon saving.

4. Enter the full call code in the **Code** field. Based on the code entered, the activity details will populate the rest of the fields in the section. Alternatively, select the activity specifications individually using the hierarchical **Level 1**, **Level 2**, and **Level 3** lookups, and let the system calculate the proper values for the Code and Priority fields.

5. Using the **Priority** lookup, you may overwrite the default priority value set for the call category selected in the previous step.

    - The Priority will go back to its default (even if you have clicked Save), if you tab from the Code field to the Level 1 field. However, navigating from Code to Level 1 with your mouse pointer will not change your selections. For this reason, avoid using the Tab button on your keyboard when going from the Code field to the Level 1 field.

    - If the Level 1 Call Category you have selected does not have a Priority default, tabbing from Code to Level 1 (even if you have clicked Save), will cause the Priority to disappear. For this reason, avoid using the Tab button on your keyboard when going from the Code field to the Level 1 field.

6. Indicate the precise activity location using the **Site**, **Building**, **Location**, and **Section** lookups. Depending on your Perspective setup, the system will either populate the address fields with the corresponding default address of the specified location stored in the database, or require you to enter the address manually.

    - If the location specified for the Activity record has associated Site Notes set in the Administration component of Perspective, every time you select the Activity record on the Activities pane in DispatchLog, the Status bar will display the running Site Notes.

7. If the activity took place off site, check the **Off Site** box.

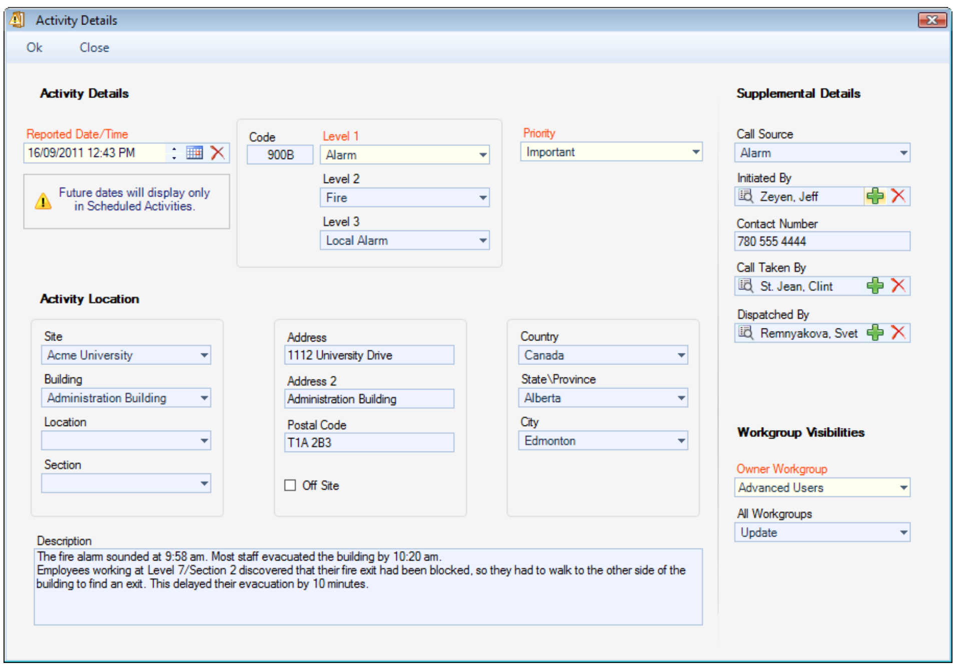
8. In the **Description** text field, enter a detailed description of the activity.

9. Select the means of receiving the call from the **Call Source** lookup (e.g., Phone, Alarm).

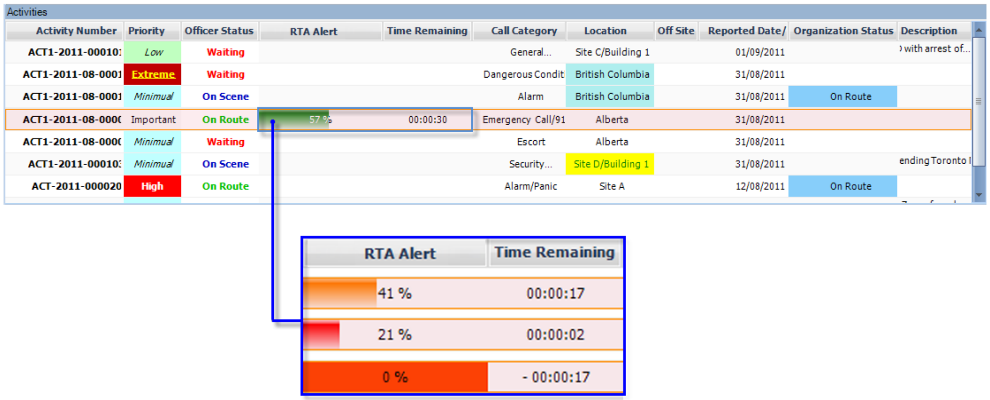
10. Click on the Add icons and select the names of the following responsible persons:

- **Initiated By**—The person who initiated the call and provided basic information for creation of the activity. Enter the initiator's **Contact Number** in the field below.
- **Call Taken By**—The person who is responsible for recording the call. By default, the call taker is the person who creates the original Activity record.
- **Dispatched By**—The person who dispatches an officer/organization for the activity. By default, the dispatcher is the person who first started to assign officers/organizations.

11. Under Workgroup Visibilities, specify the name of the workgroup that is responsible for the activity in the **Owner Workgroup** field.
12. From the **All Workgroups** lookup, select the rights that are assigned to all other workgroups in relation to the created activity (e.g., None, Update, or Read).
13. Click **OK** to save the activity in the Activities pane under a distinctive Activity Number, with the Officer and the Organization Status both set to "Waiting".



14. If the created activity's specifications imply associated Standard Operation Procedures (SOP), the SOP window will pop up as soon as you click OK. For further details, see the "Review the Activity's Standard Operating Procedures" chapter.
15. If your system's setup includes a Regulated Time to Act (RTA) alert for the activities that match the type you just created, the **Time Remaining** cell for the activity will start counting the time attributed for the dispatcher to act on the activity. This may demand from the dispatcher to dispatch an officer or an organization for the activity, or to change the status or location of a resource or the activity. The amount of time left is also reflected in the color of the **RTA Alert** decreasing time bar. Once the time is up, the timer will start to count the time that has passed after the RTA reached 0%, and the RTA bar will flash red.



16. To attach supplemental information to the basic Activity record, including the details of responses, requests, involvements, attachments and assignments, double-click the Activity record or select it on the Activities pane and click **Activity Details**. The Activity record will contain additional tabs that can be used to create a complete activity, which is comparable to the records created in Perspective's Activity component, within the DispatchLog module. For further details, please refer to the rest of the sections contained in the "Create and Manage an Activity" chapter.

Record an Officer's Response to an Activity

This section will introduce an additional method of documenting past officers' responses to an Activity record. On the surface, it is a concise way of recording the whole dispatch process of multiple officers for a single activity, as described throughout the "Dispatch an Officer for an Activity", "Update an Officer's/Organization's Status", "View or Update an Officer's/Organization's Location", "Update an Officer's Call Sign", "Abandon an Activity Record", and "Clear an Officer/Organization from an Activity" chapters.

1. Double-click the Activity record you want to edit, or select it on the Activities pane and click **Activity Details**.

2. Select the **Responses** tab.

3. Open the **Officer Responses** sub-tab.

4. Click **Add New**. A pop-up window will open.

5. Select the responding officer's record from the **Officer Name** pick list.

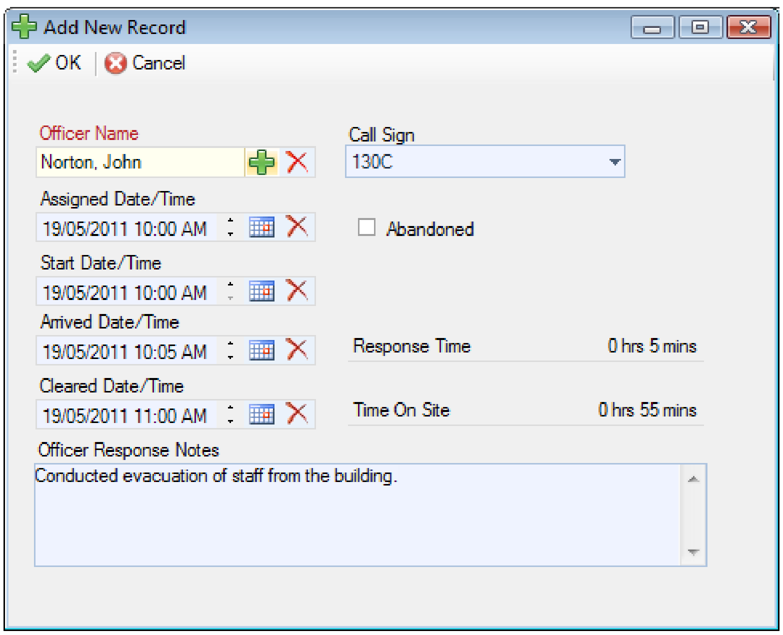
6. The **Call Sign** field will auto-populate with the selected officer's call sign abbreviation.

7. Track the temporal progress of the officer's response specifying the following time points:

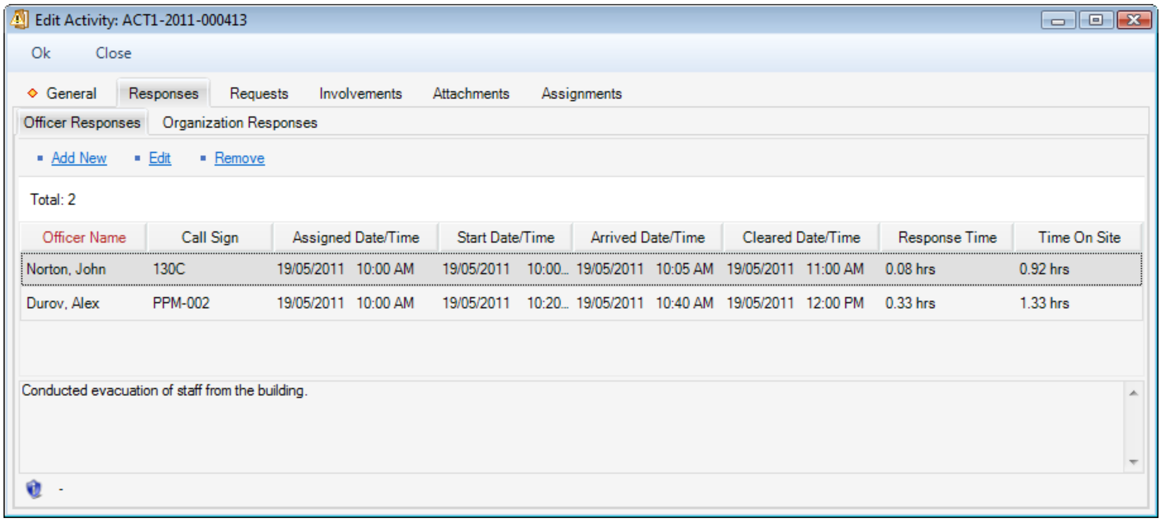
   - **Assigned Date/Time**—The date and time when the officer was dispatched for the activity.

- Check the **Abandoned** box if the officer has been assigned to the activity, but did not manage to carry out the response tasks due to reassignment for another activity or the fact that they did not arrive at the site of the activity.
- **Start Date/Time**—The date and time when the officer started to respond to the activity.
- **Arrived Date/Time**—The date and time when the officer arrived on the activity's site.
- **Cleared Date/Time**—The date and time when the officer completed the activity and vacated the site.

8. Once the appropriate dates and times have been entered, the system will calculate how long it took the officer to respond (**Response Time**) and how long they remained on site (**Time On Site**).
9. Enter any additional information about the officer's response in the **Officer Response Notes** text box.



10. Click **OK**. The new officer's response entity will be saved as an entry in the Officer Responses grid.
11. Click **OK** on the activity's form to save the changes made to the record.



Record an Organization’s Response to an Activity

This section will introduce an additional method of documenting past organizations’ responses to an Activity record. On the surface, it is a concise way of recording the whole dispatch process of multiple organizations for a single activity, as described throughout the “Dispatch an Organization for an Activity”, “Update an Officer’s/Organization’s Status”, “View or Update an Officer’s/Organization’s Location”, “Abandon an Activity Record”, and “Clear an Officer/Organization from an Activity” chapters.

1. Double-click the Activity record you want to edit or select it on the Activities pane and click **Activity Details**.

2. Select the **Responses** tab. Then, open the **Organization Responses** sub-tab.

3. Click **Add New**. A pop-up window will open.

4. Select the responding organization’s record from the **Organization** pick list. If the Organization record does not already exist, use the Quick Add function to create one.

5. The **Organization Name** field will now automatically populate with the linked organization’s name. Depending on the data available, some additional fields may also populate with information drawn from the linked Organization record.

6. To add the organization’s logo to the record, click the Add icon in the image box.

7. Locate the image file in the browser window and click **Open**.

8. Specify the category of the organization’s response (e.g., Emergency Service, Responding Service/Agency, Indirectly Involved) by selecting a description from **Involvement Type**.

9. If applicable, input the organization’s file, ID, or other tracking number in the **Organization Number** field.

10. Select the applicable **Organization Type** from the lookup list.

11. Specify the mode by which the organization has been notified of the activity in the **Notified By** lookup list.

12. If there is any documentation associated with the organization's response to the activity (e.g., a work order), note the associated tracking number in the **Reference Number** field.

13. Select the name of the organization's primary contact from the **Contact Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

14. Enter the contact person's phone number under **Contact Phone**.

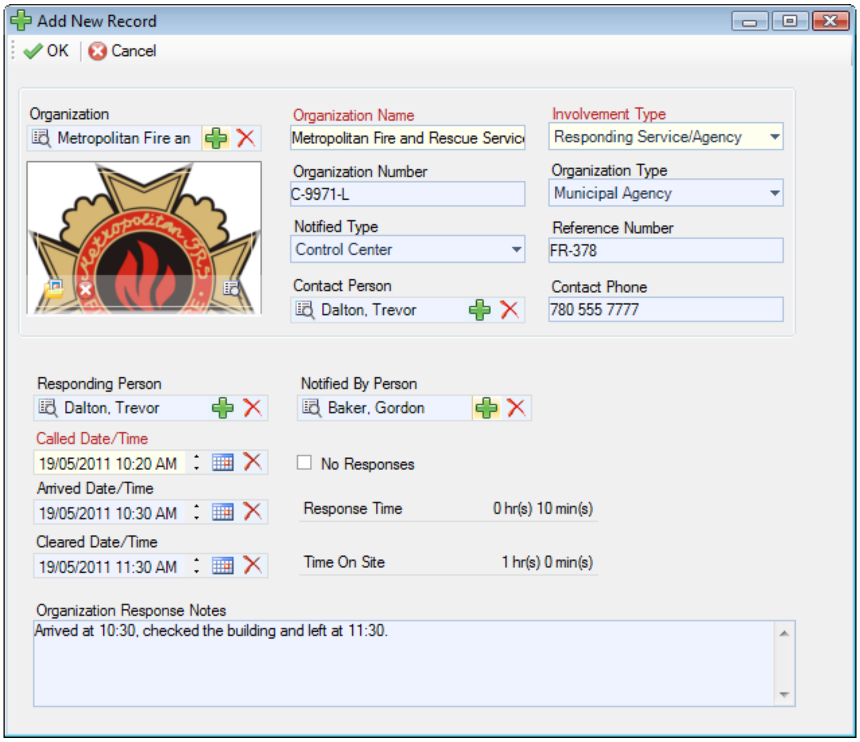
15. Select the record of the person in the organization who responded to the activity from the **Responding Person** pick list and the record of the person who called the organization from the **Notified By Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

16. Track temporal progress of organization response by specifying the following time points:

    - **Called Date/Time**—The date and time when the organization was contacted about the activity. Check the **No Responses** box if the organization did not respond.
    - **Arrived Date/Time**—The date and time when the organization arrived on site.
    - **Cleared Date/Time**—The date and time when the responding organization vacated the site after having had completed the response.

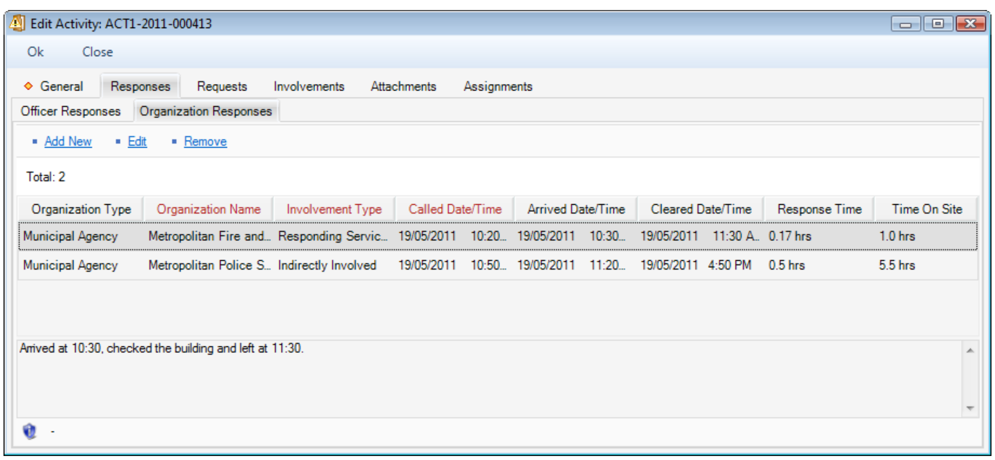
17. Once the appropriate dates and times are entered, the system calculates how long it took the organization to respond (**Response Time**) and how long they remained on site (**Time On Site**).

18. Enter any additional information about the organization's response in **Response Notes**.



19. Click **OK**. The new organization's response entity will be saved as an entry in the Organization Responses grid.

20. Click **OK** on the activity's form to save the changes made to the record.



Note an Action Request for an Activity

1. In order to document an action request for an activity, double-click the Activity record, or select it on the Activities pane and click **Activity Details**.

2. Select the **Requests** tab.

3. Click **Add New**. A pop-up window will open.

4. Select the requested organization’s record from the **Organization** pick list. If the corresponding Organization record does not already exist, use the Quick Add function to create one.

5. The **Organization Name** field will now automatically populate with the linked organization’s name. Depending on the data available, some additional fields may also populate with information drawn from the linked Organization record.

6. To add the organization’s logo to the record, click the Add icon in the image box.

7. Locate the image file in the browser window and click **Open**.

8. Specify the type of services offered by the requested organization selecting a description from the **Involvement Type** lookup list.

9. If applicable, input the organization’s file, ID, or other tracking number in the **Organization Number** field.

10. Select the applicable **Organization Type** from the lookup list.

11. Specify the mode by which the action has been requested in the **Notified Type** lookup list (e.g., via Perspective DispatchLog, Investigator, or Control Center).

12. Note the organization’s associated **Reference Number**.

13. Select the name of the requested organization’s primary contact from the **Contact Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

14. Enter the contact person’s phone number under **Contact Phone**.

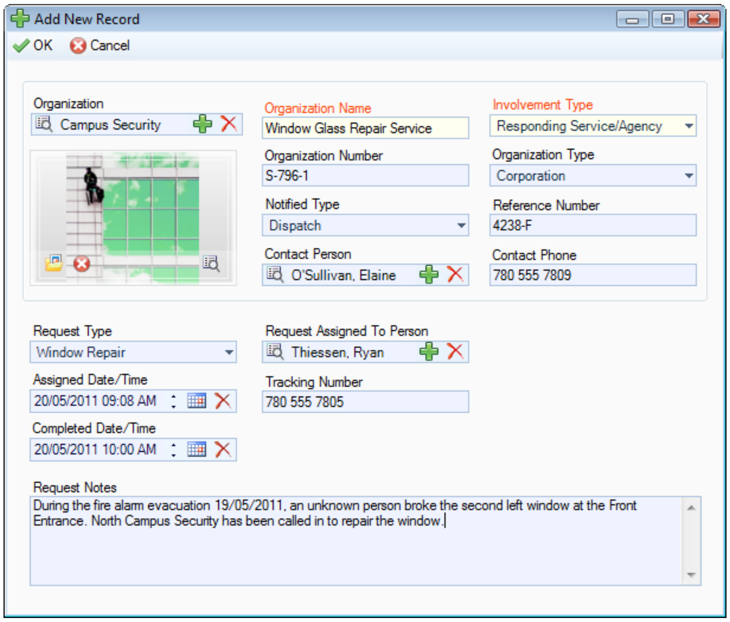
15. Choose the appropriate description for the requested action (e.g., Maintenance, Escort, Window Repair) from the **Request Type** lookup list.

16. Select the record of the person who has been administered the request from the **Request Assigned To Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

17. Enter the date and time the request was made in the **Assigned Date/Time** field.

18. When the action is complete, input the **Completed Date/Time**.

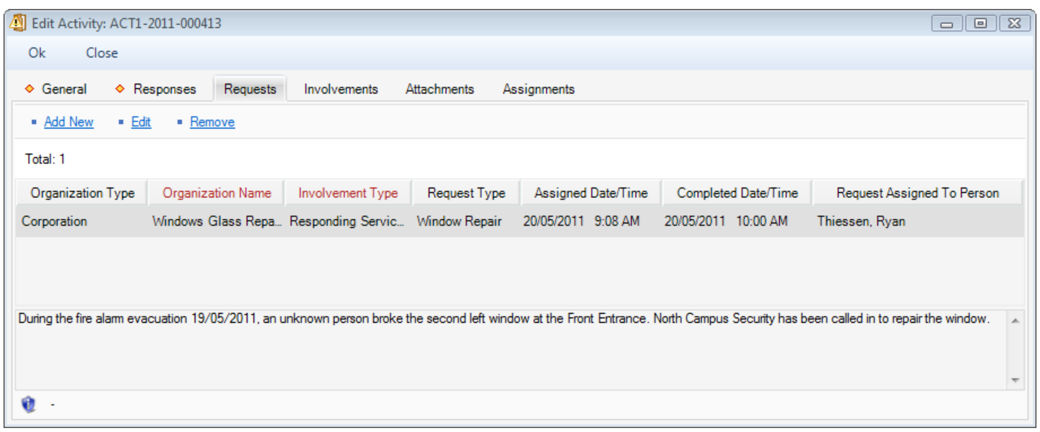
19. If there is a tracking or other ID number assigned to the action request, enter it in the **Tracking Number** field.



20. Enter any additional **Request Notes**.

21. Click **OK**. The new action request entity will be saved in the Organization Responses grid.

22. Click **OK** on the activity's form to save the changes made to the record.



Add Persons Involved in an Activity

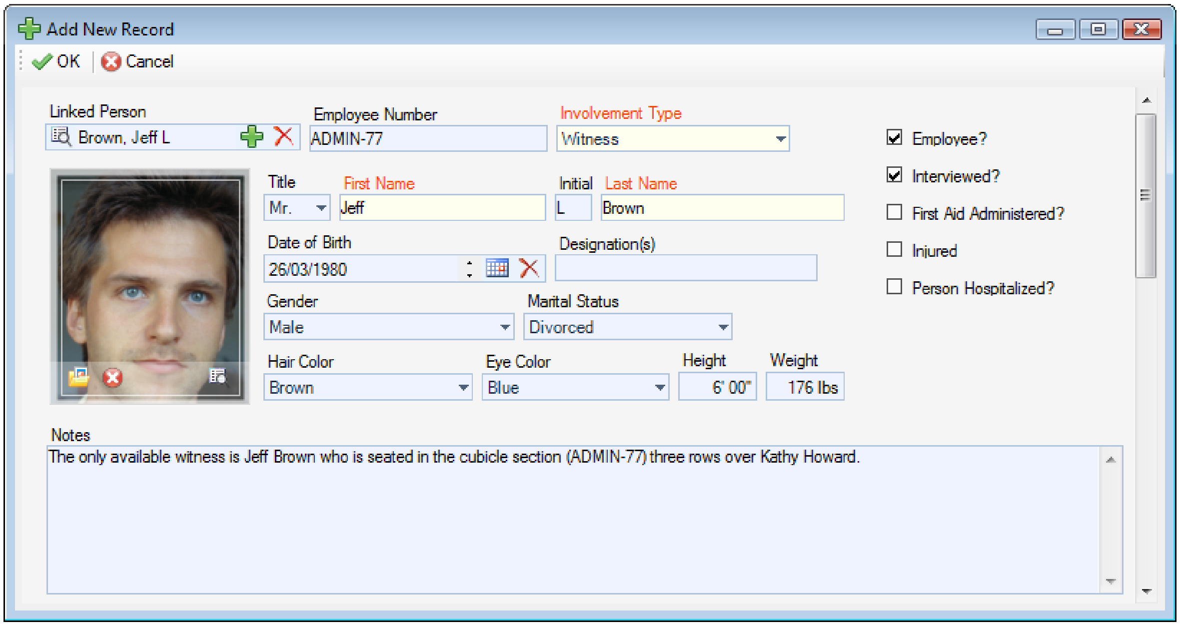
Note General Details of an Involved Person

1. In order to add an involved person to an Activity record, double-click the record or select it on the Activities pane and click **Activity Details**.

2. Select the **Involvements** tab.

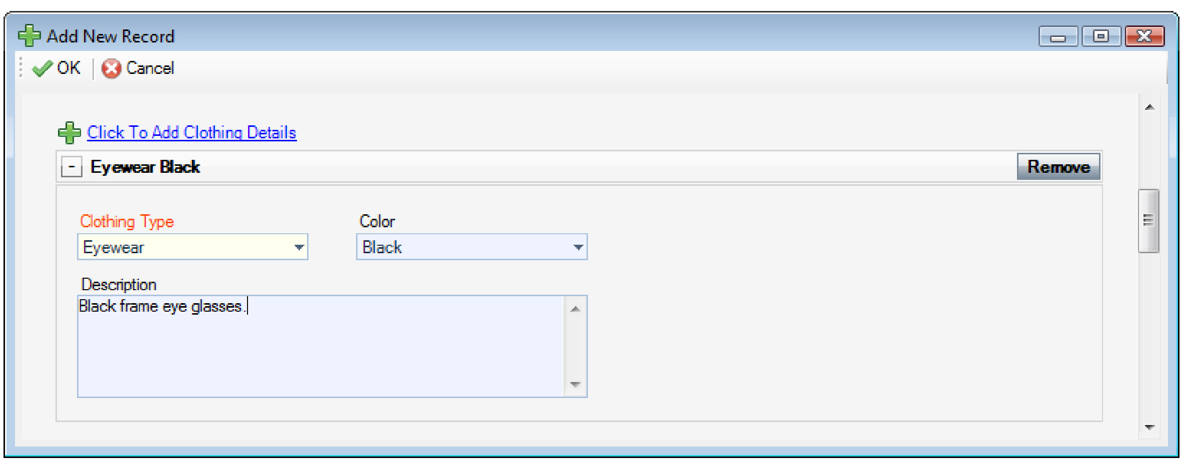
3. Click the **Persons** sub-tab.

4. Click **Add New**. A pop-up window will open.
5. Select the involved person's record from the **Linked Person** pick list. If a Person record does not already exist for this individual, use the Quick Add function to create one.
6. The **First Name** and **Last Name** fields will now automatically populate with the linked person's name. Depending on the data available, some additional fields may also populate with information drawn from the linked person's record.
7. From the **Involvement Type** lookup list, choose the appropriate description.
8. Enter the person's **Initial**, **Title** (e.g., Mr.) and **Designation** (e.g., Chartered Accountant).
9. Specify the involved person's **Date of Birth**, **Gender**, and **Marital Status**.
10. Identify the person's physical characteristics, including **Hair Color**, **Eye Color**, **Height**, and **Weight**.
11. If the person is an employee of your organization, check the **"Employee?"** box and enter the **Employee Number**.
12. If the person was interviewed regarding the occurrence, check the **"Interviewed?"** box.
13. If the person received first aid, or was injured or hospitalized as a result of the occurrence, check the **"First Aid Administered?"**, **Injured**, and/or **"Person Hospitalized?"** boxes.
14. Enter notes about the person's involvement in the occurrence in the **Notes** text box.
15. To add a photo of the involved person to the record, click the Add icon in the image box.
16. Locate the image file in the browser window and click **Open**.
17. Click **OK** to save the involved person's sub-record.



Add the Involved Person’s Clothing Details

1. Open the saved involved person’s sub-record.
2. Open the **“Click to Add Clothing Details”** link.
3. Choose the **Clothing Type** and **Color** from the lookup lists.
4. Enter a detailed description of the item in the **Description** box.
5. Click **OK**, and repeat for as many articles of clothing as necessary.



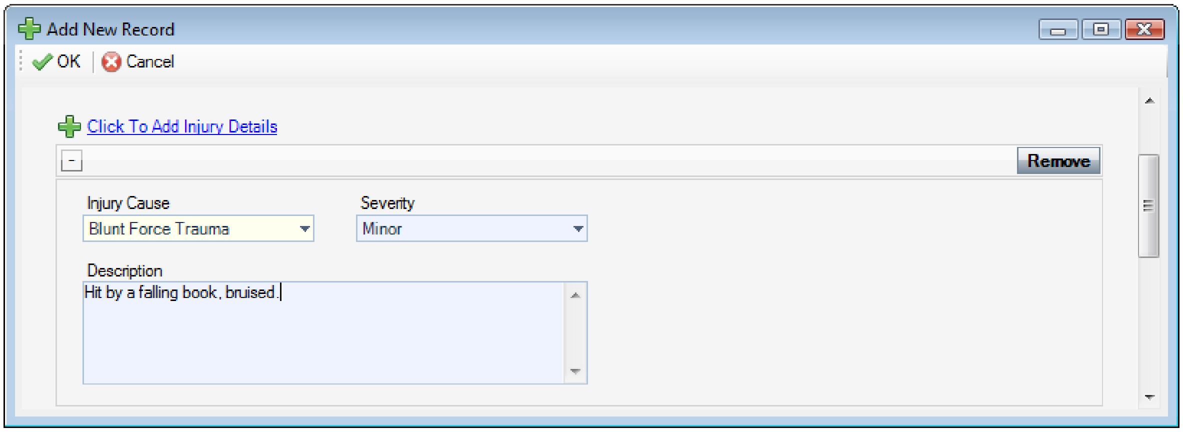
Record the Involved Person’s Sustained Injuries

1. Open the saved involved person’s sub-record.
2. Open the **“Click to Add Injury Details”** link.

3. Specify the **Injury Cause** and **Severity**.

4. Include a detailed description of the injury in the **Description** text box.

5. Click **OK**, and repeat for as many injury entities as necessary.



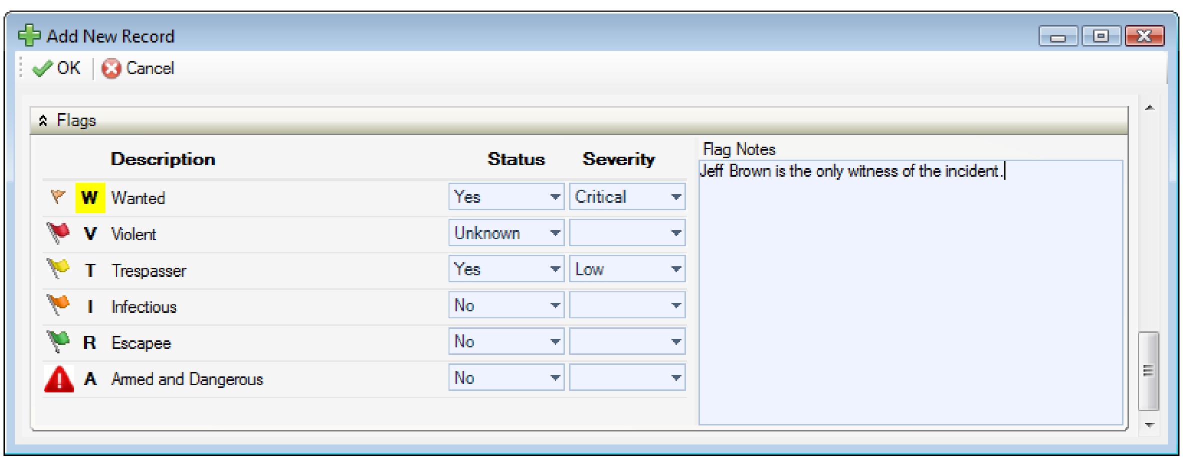
Flag the Involved Person

1. Open the saved involved person's sub-record.

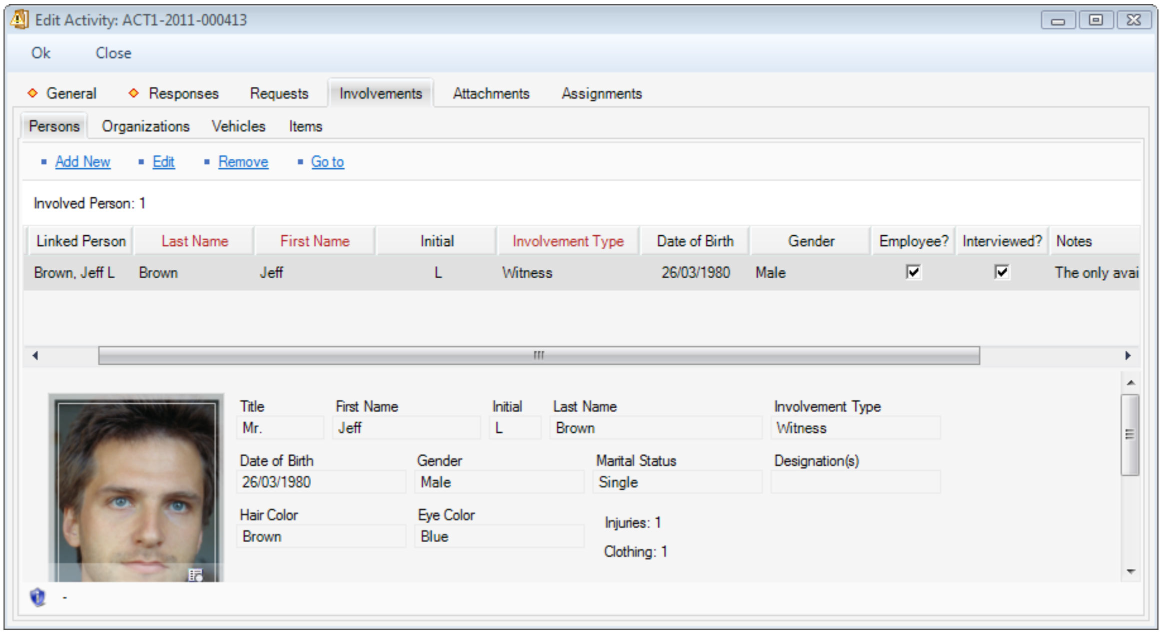
2. In the **Flags** section, specify the **Status** (i.e., Yes, No, or Unknown) as well as the **Severity** of each flag (e.g., Critical, High, Low). Flags may include such descriptions, as Trespasser, Violent, Infectious, Escapee, Wanted, etc.

3. Enter comments in the **Flag Notes** section.

4. Click **OK**.



5. Click **OK** on the activity's form to save the changes made to the record.



Add Organizations Involved in an Activity

1. In order to add an involved organization to an Activity record, double-click the record or select it on the Activities pane and click **Activity Details**.

2. Select the **Involvements** tab.

3. Click the **Organizations** sub-tab.

4. Click **Add New**. A pop-up window will open.

5. Select the involved organization's record from the **Linked Organization** pick list. If an Organization record does not already exist, use the Quick Add function to create one.

    - The **Organization Name** field will now automatically populate with the linked organization's name. Depending on the data available, some additional fields may also populate with information drawn from the linked Organization record.

6. Specify how the organization became involved in the occurrence by selecting a description from the **Involvement Type** lookup list.

7. If applicable, input the organization's file, ID, or other tracking number in the **Organization Number** field.

8. Select an **Organization Type** from the lookup list.

9. Specify the means by which the organization has been notified of the occurrence in the **Notified By** lookup list.

10. If there is any documentation associated with the organization’s involvement in the occurrence (e.g., a work order), note the associated tracking number in the **Reference Number** field.

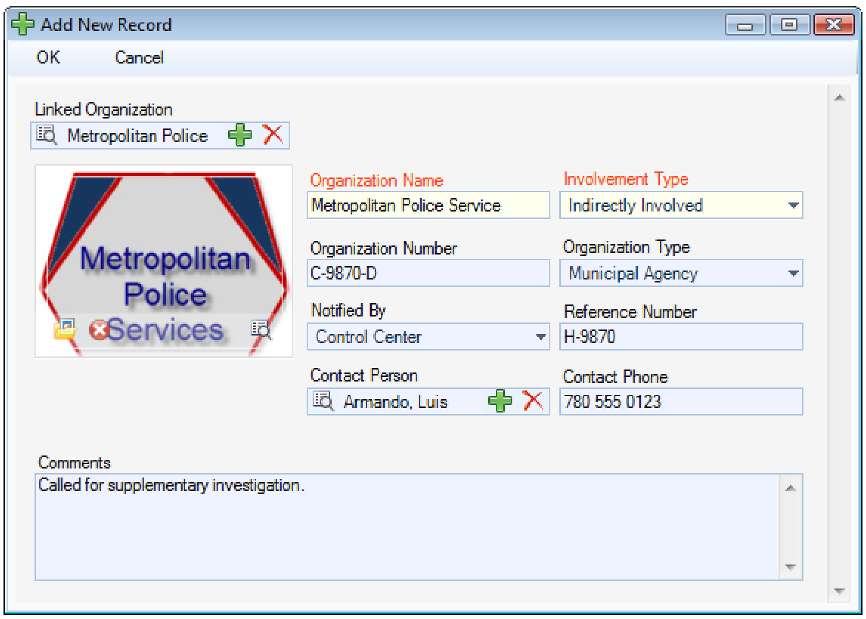
11. Select the name of the organization’s primary contact from the **Contact Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

12. Enter the contact person’s phone number under **Contact Phone**. Ensure that you use a consistent format when entering phone numbers.

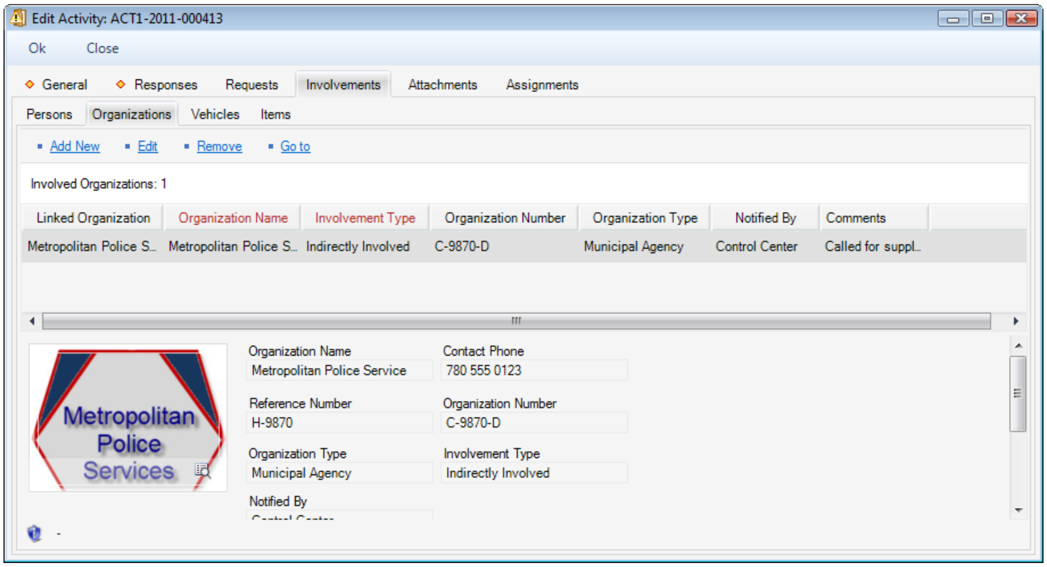
13. Enter notes in the **Comments** box.

14. To add the organization’s logo to the record, click the Add icon in the image box.

15. Locate the image file in the browser window and click **Open**.



16. Click **OK** on the activity’s form to save the changes made to the record.



Add Vehicles Involved in an Activity

1. In order to add an involved vehicle to an Activity record, double-click the record or select it on the Activities pane and click **Activity Details**.

2. Select the **Involvements** tab.

3. Click the **Vehicles** sub-tab.

4. Click **Add New**. A pop-up window will open.

5. Select the involved vehicle from the **Linked Vehicle** pick list. If a Vehicle record does not already exist, use the Quick Add function to create one.

6. The **License Plate** field will now automatically populate with the linked vehicle's license plate number. Depending on the data available, some additional fields may also populate with information drawn from the linked vehicle's record.

7. Indicate how the vehicle became involved in the occurrence by selecting a description from the **Involvement Type** lookup list.

8. Select the most appropriate description of the vehicle's current status from the **Disposition** lookup list (e.g., Seized, Stolen, Released to Owner).

9. Specify the vehicle's **Year**, **Make**, **Model**, **Style**, and **Color**. Your selection in the Model field will depend on the value recorded in the Make field.

10. If known, enter the vehicle's **VIN** and approximate **Vehicle Value**.

11. If the vehicle belongs to your organization, check the **"Company Vehicle?"** box.

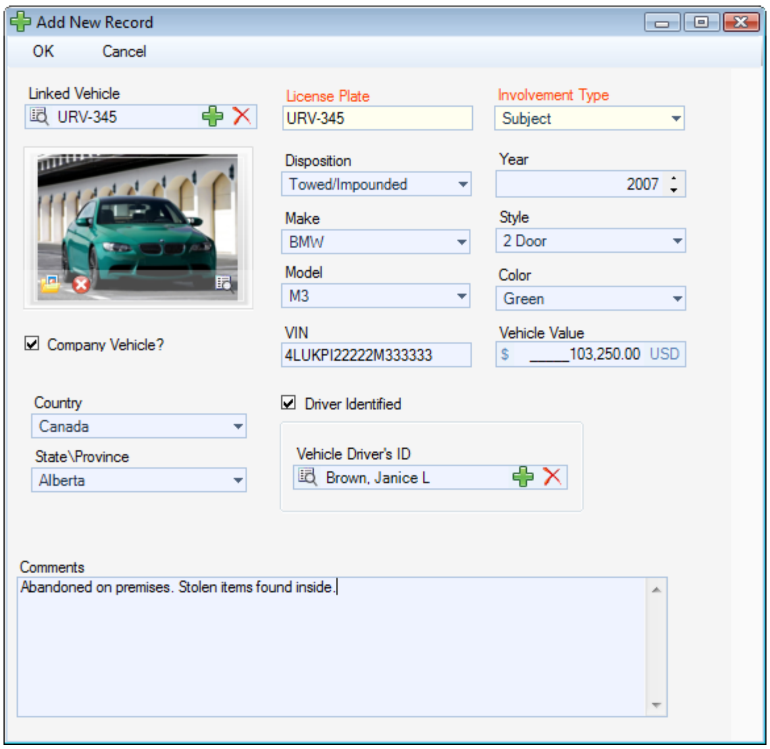
12. If known, indicate where the vehicle's license plate is registered in the **Country** and **State/Province** fields.

13. If the vehicle's driver was identified, check the **Driver Identified** box. Then, select the driver's name from the **Vehicle Driver** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

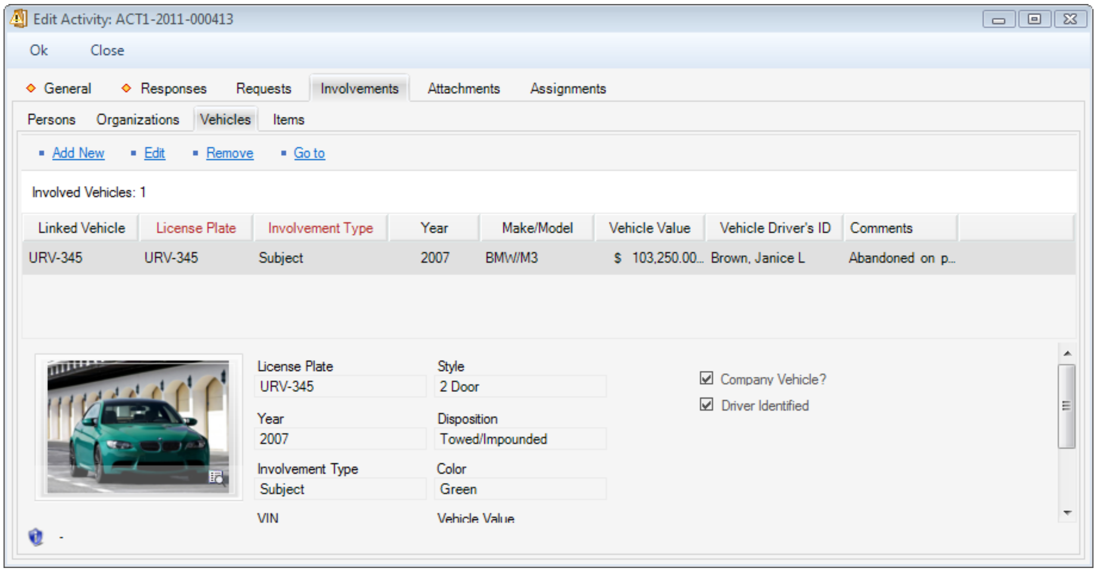
14. Enter any applicable notes under **Comments**.

15. To add a photo of the vehicle to the record, click the Add icon in the image box.

16. Locate the image file in the browser window and click **Open**.



17. Click **OK** on the activity's form to save the changes made to the record.



Add Items Involved in an Activity

1. In order to add an involved item to an Activity record, double-click the record or select it on the Activities pane and click **Activity Details**.

2. Select the **Involvements** tab.

3. Click the **Items** sub-tab.

4. Click **Add New**. A pop-up window will open.

5. Select the involved item's name from the **Linked Item** pick list. If an Item record does not already exist, use the Quick Add function to create one.

   - The **Item Name** field will now automatically populate with the linked item's name. Depending on the data available, some additional fields may also populate with information drawn from the linked item's record.

6. If known, enter the serial or ID number of the item in the **Serial Number** field.

7. Select the most appropriate description of the item's current status from the **Disposition** lookup list (e.g., Seized as Evidence, Destroyed, Returned to Owner).

8. Enter the item's exact or estimated value in the **Item Value** field.

9. If applicable, check the **"Item is Evidence?"** box.

10. Identify the general classification of the item by making selections from the **Item Category** and **Item Type** lookup lists. These fields are hierarchical.

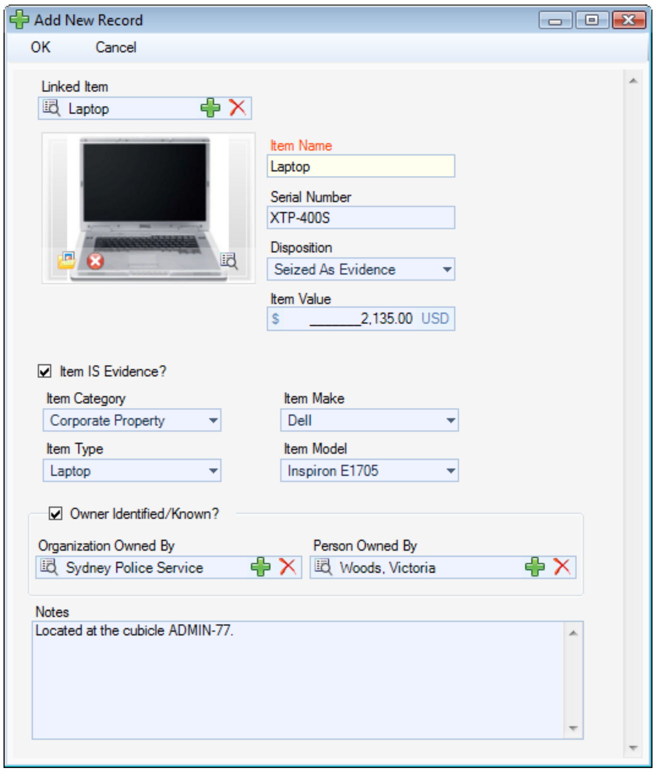
11. Specify the **Item Make** and **Item Model**. These fields are hierarchical.

12. If the item's owner is known, check the **"Owner Identified/Known?"** box. Then, select the name of the organization or person that owns the item from either the **Organization Owned By** or **Person Owned By** pick lists. If an Organization or a Person record does not already exist, use the Quick Add function to create one.

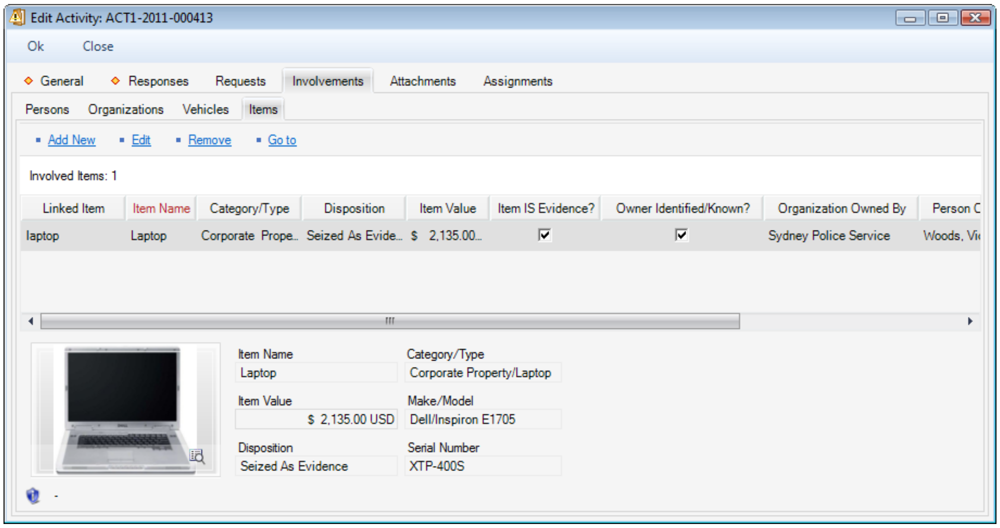
13. Add comments about the item in the **Notes** field.

14. To add a photo of the item to the record, click the Add icon  in the image box.

15. Locate the image file in the browser window and click **Open**.



16. Click **OK** on the activity's form to save the changes made to the record.



Add an Attachment to an Activity Record

There are three ways to add attachments to an activity. The first way is via the **Activity Details** option, the second way is via the **Attachment** option, and the third way is by dragging a file you want to attach with the mouse to the relevant Activity record. The former option provides an opportunity to view any of the attached files, if required. The latter option is the quickest option, as it immediately transfers you to the step 3, skipping the first two formal steps of the other options.

1. In order to add an image, media file, or a document to an Activity record, select the record on the Activities pane and either click **Activity Details**, open the **Attachments** tab and click **Add New**, or click **Attachment**. *If you prefer a quicker option, drag the file you want to attach to the Activity record on the Activities pane.* A pop-up window will open.

2. Add attachments by either dragging and dropping, or clicking **Browse**.

3. For each attachment:

   a. The **Attachment Title** field will automatically populate with the name of the attached file. If necessary, modify the name.

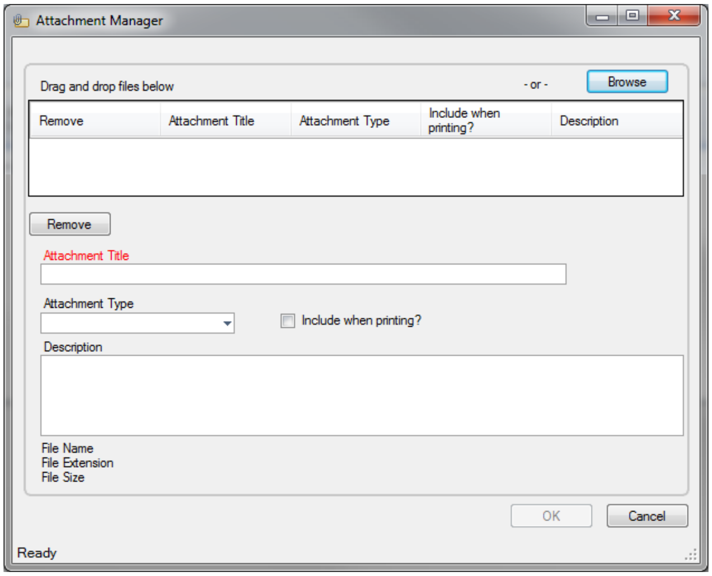
   b. From the **Attachment Type** lookup list, select the appropriate designator for the attachment (e.g., Document, Picture, Video, Voice Recording).

   c. Give an overview of the attachment in the **Description** text box.

   d. For image files (e.g., .bmp, .gif, .jpg, .png), check the **"Include when Printing?"** box to have a copy of the image included with every print-out of the record.

   e. Click **Remove** to remove any unwanted attachments.

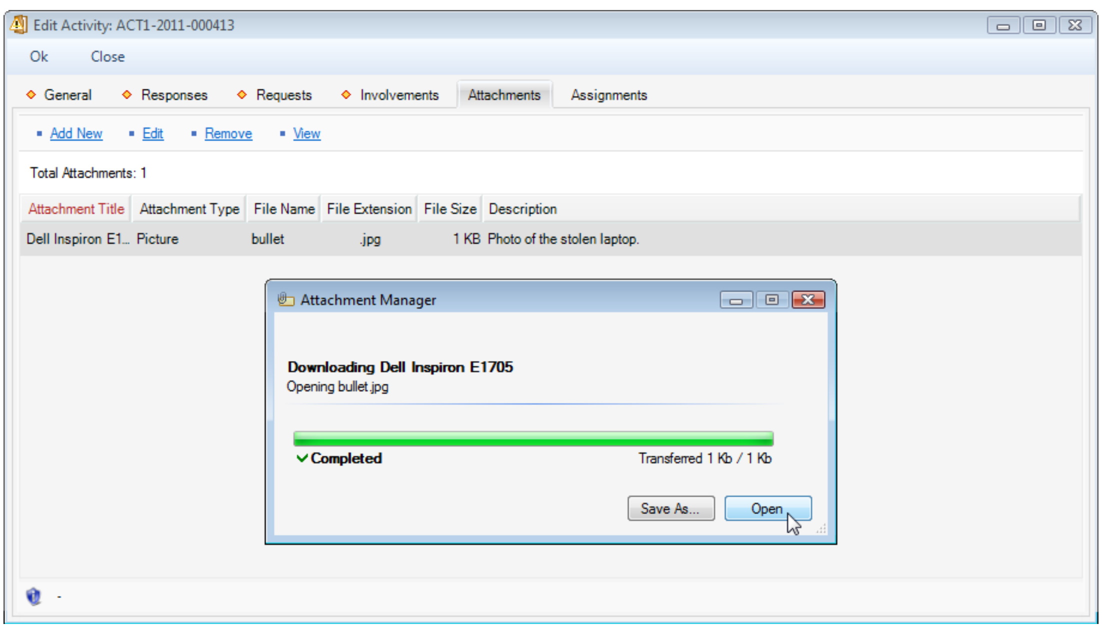
4. Once finished working with attachments, click **OK**.



5. To preview an attachment, ensure the attachment is highlighted in the grid and click **View**.

6. Once the attachment is loaded, click **Open**. The attachment file will open in a separate window.

7. Close the window to return to the record.



Give an Activity-Related Assignment

1. In order to give an activity-related assignment to another user, select the Activity record on the Activities pane and click **Activity Details**.

2. Open the **Assignments** tab and click **Add New**. A pop-up window will open.

3. Choose the applicable option from the **Assignment Type** lookup list.

   - By default, your name will appear in the **Assigned By Person** field. If you are not the person who created the assignment, select the applicable person from the pick list.

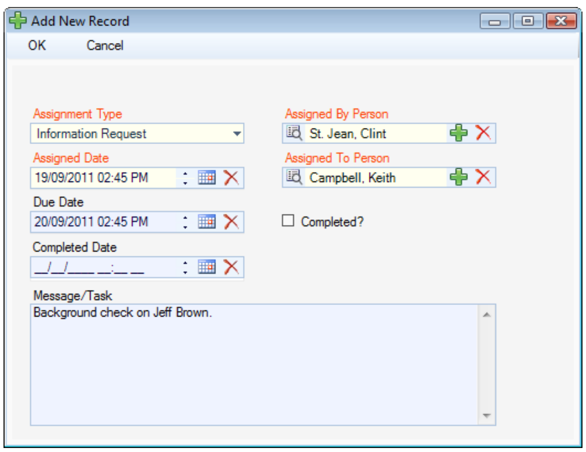
4. Select the user who must complete the assignment from the **Assigned To Person** pick list.

5. Complete the **Assigned Date**, and enter the date the assignment must be completed under **Due Date**.

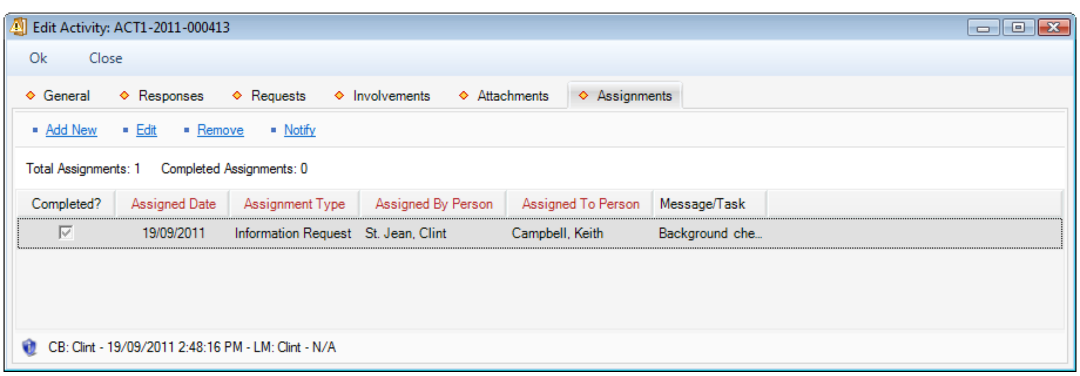
6. When the assignment is finished, check the **"Completed?"** box and enter the appropriate date in the **Completed Date** field.

7. Enter notes or instructions in the **Message/Task** text box.

8. Click **OK**. The new assignment will be added to the Assignments grid.



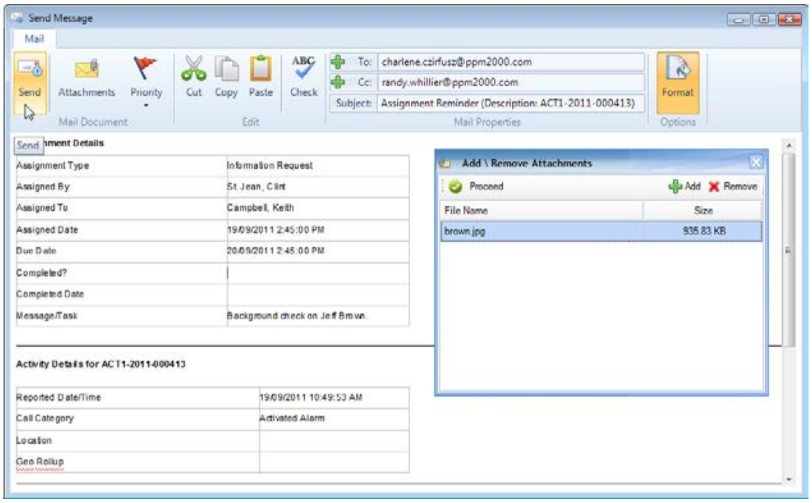
9. Click **OK** on the activity's form to save the changes made to the record.



10. To send an email notification of any of the record's assignments, select the specific assignment in the list and click **Notify**. An email message will open that contains the assignment and the activity details.

11. Check the message details, specify the recipients of the message, and add any other information that you think is necessary (e.g., attachments).

12. Click **Send**.



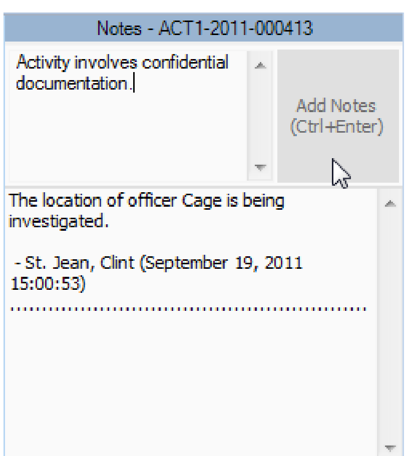
Add Activity Notes

1. Select the Activity record on the Activities pane and click **Activity Notes** on the toolbar. The Notes pane will expand to the left of the Activities pane.

2. To enter a brief update to the activity's disposition or status, type the notes in the **Notes** text box and click **Add Notes**.

   - Each note entered under the selected activity will be supplied with a date stamp and the user name of the reporting person.

3. To hide the Notes pane, deselect the Activity Notes icon.



Email a Basic Activity Record

1. To email the basic details of an Activity record, select the record on the Activities pane and click **Mail**. The Send Message screen will appear with the details of the record that have been specified under the General tab. (For details, see "Create a New Basic Activity Record").

2. If required, edit the subject and the text of the original message. If you want to format the message details in plain text rather than the default HTML table, unclick the **Format** button. By default, the formatting option is active.

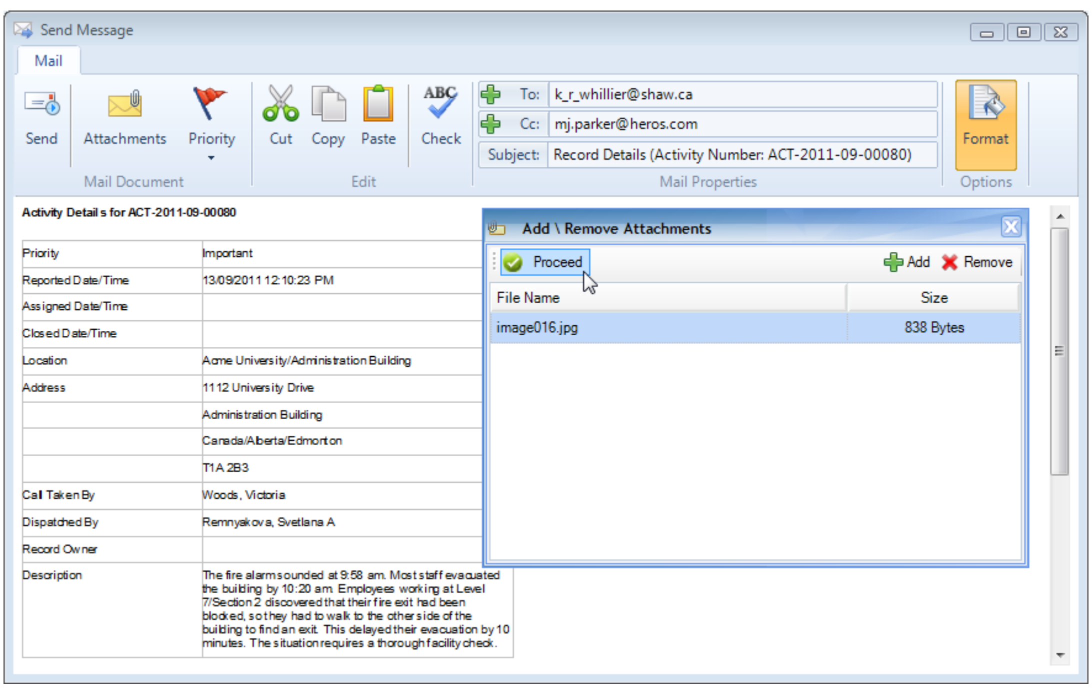
3. Click **Check** to check the spelling of your message.

4. To add an attachment to your email, click **Attachments**. A window will appear where you can add attachments by clicking **Add**, selecting the file you need and clicking **Open**. Click **Proceed** to return to the main message screen.

5. Specify the recipients' email addresses. You may type in a recipient's email address directly into the **To** and/or **CC** fields, or import a contact from Perspective's database by clicking To and/or CC and selecting a person from the displayed Entity List. The Entity List will be populated with user records that contain an email address with the **Primary Email** box checked.

6. To set a priority for the message you are sending, click **Priority** and select from *High*, *Normal* (default), and *Low* priority options.

7. When finished with editing of your email message, click **Send**.



Delete an Activity Record

1. To delete an Activity record from DispatchLog, select it in the Activities pane and press the **<Delete>** key.

2. Click **OK** when prompted to confirm to completely remove the record from the database.

Schedule an Activity

To create an Activity record for future dispatching (i.e., a scheduled activity), open the **Schedule** tab and click **Add** on the toolbar. The only difference between creating a new current and a new scheduled activity is the date and time you input as **Reported Date/Time**. In case of the current activity, the date must not be modified, whereas the scheduled Activity record must contain a future date. By default, the Reported Date/Time field of a scheduled Activity record will contain tomorrow's date.

For a full description of the procedures involved in creating a new scheduled Activity record, please, refer to the "Create and Manage an Activity" chapter. Please note that scheduled activities only contain records of officers' and organizations' responses when they reach the state of a current activity. Until then, they are stored as passive records of activities planned for future dispatching.

To edit a scheduled activity adding supplemental details (such as requests, involvements, attachments, and assignments), select it in the Activities pane and **Edit**. The Activity record with the full set of tabs will be displayed.

To copy a scheduled activity, select it in the Activities pane and **Copy**. The exact copy of the selected basic Activity record will be displayed for editing. Note that the Copy function does not apply to requests, involvements, attachments, or assignments. To save the copied Activity record under a new number, click **OK**.

To refresh the view of the scheduled activities list, click **Refresh**.

As soon as the scheduled activity's Reported Date/Time reaches the current date and time, the Activity record will get transferred to the current Activities list under the **Start** tab. From there, you may dispatch the activity, as described in the "Dispatch Activities" chapter.

To *make a scheduled activity current immediately*, select it on the Activities pane and click **Start Now**. The scheduled activity is transferred to the current activities list under the Start tab.

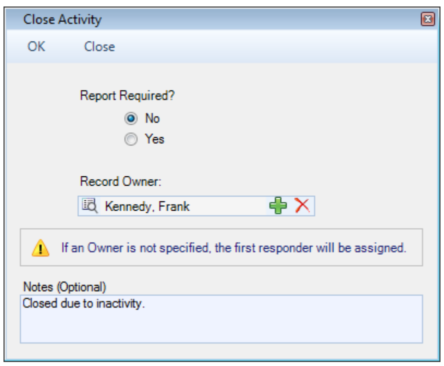
Close an Activity

1. In order to close an activity, select an activity record from the Activities pane and click the **Close** icon . The Close Activity form will open, asking you if a report of the selected activity is required.

2. If the report is required, select **Yes** and specify the **Record Owner**. The latter manipulation determines the amount of detail that will be contained in the report. If no report is required, select **No**.

3. Add **Notes**, as applicable.

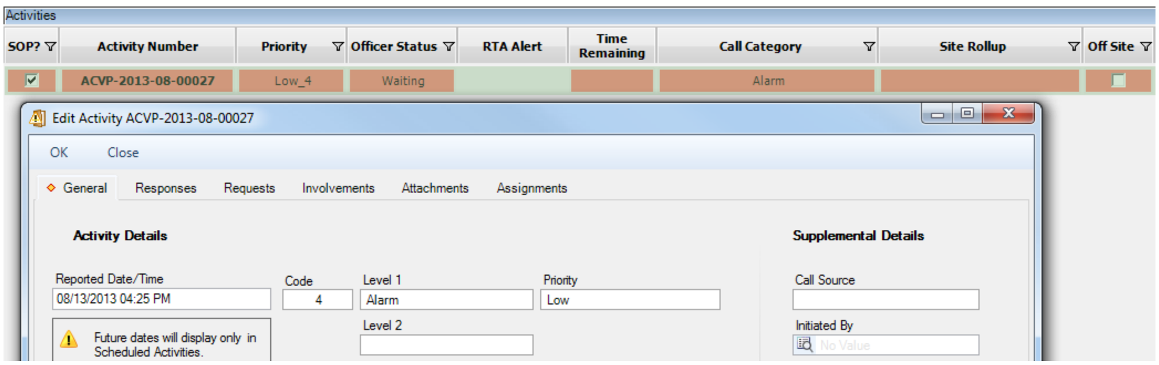
4. Click **OK**. Once closed, the whole activity record will be transferred to the Perspective’s **Activities** database found in the Data Forms.



Dispatch Activities

The following sections explain how to perform dispatching activities.

Before going further in this chapter, please note that users are unable to make changes to an activity if another user is currently editing it; however, it can still be viewed in read-only mode. An activity that is currently being modified is highlighted in red.



Bring an Officer On Duty

1. Click **On Duty** on the toolbar. A pop-up window will appear.

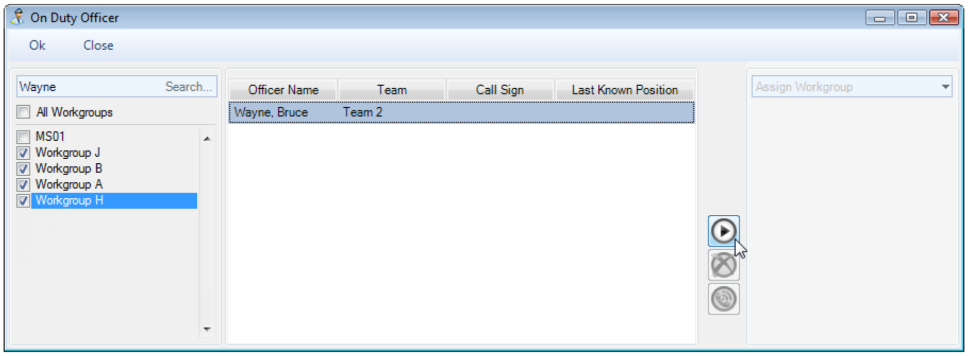
2. Enter the name of the officer you would like to bring on duty in the **Search** field. To display all available officers, leave the Search field blank.

3. Restrict your search by selecting the specific workgroup(s) the officer is associated with. Otherwise, check **All Workgroups** to search the whole database.

4. Click **Search**. The middle pane will display a list of officers that correspond to the criteria.

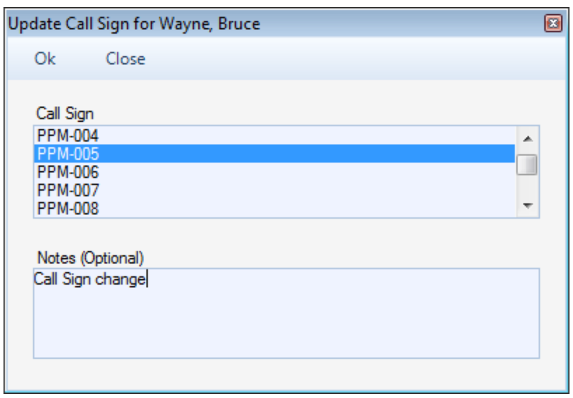
5. Select the officer you want to bring on duty from the list in the middle pane.

6. Click the arrow button to transfer the selected Officer record to the on duty list displayed on the right pane of the window. At the same time, the Available pane on the main DispatchLog window will update with the new Officer record too. The status of the officer who has been newly brought on duty will be set to *Available*. A pop-up window will appear suggesting to update the officer's Call Sign.



7. Select the required officer's **Call Sign** from the list and enter the appropriate **Notes**.

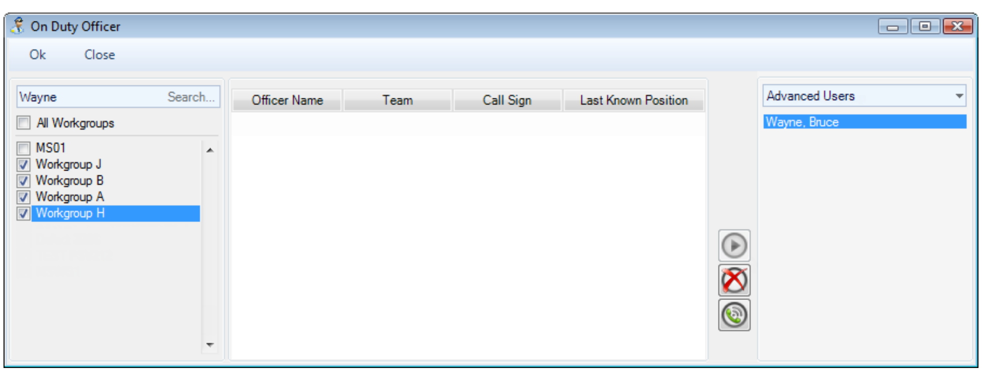
8. Click **OK** to complete the operation.



9. Optionally, continue to bring more officers on duty repeating the previous steps, change their Call Signs by clicking the call sign update button , or delete some officers from both the on duty list and the Available pane by clicking the delete button .

10. If required, assign the officer displayed on the right pane to a workgroup outside of the officer's working area, selecting the workgroup's name from the lookup list above.

11. Click **OK** to return to the main DispatchLog window.



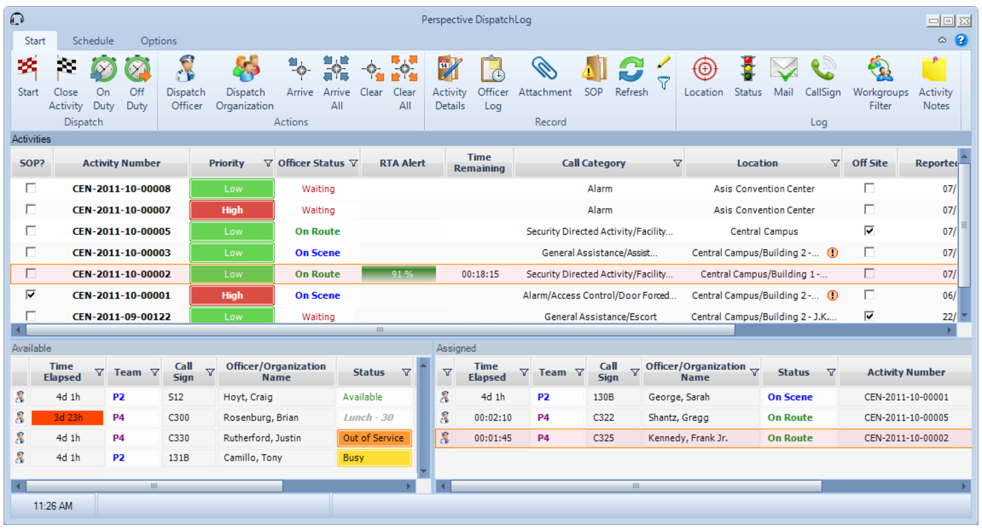
Note: If two Dispatchers try to assign the same Officer to an Activity, the second Dispatcher to attempt this will be notified that the Officer is already on duty.

Dispatch an Officer for an Activity

1. Select an Activity record from the Activities pane.

2. On the Available pane, select an officer that you want to dispatch for the selected activity and click **Dispatch Officer** on the toolbar. Alternatively, drag the Officer record from the Available pane to the Activity record.

3. The Officer record will move from the Available pane to the Assigned pane and will be supplied with the relevant dispatch **Activity Number**. The **Time Elapsed** cell on the Assigned pane will start counting the time the officer has been registered in the *On Route* status. The Activity record will also be updated with the dispatched **Officer Status**.



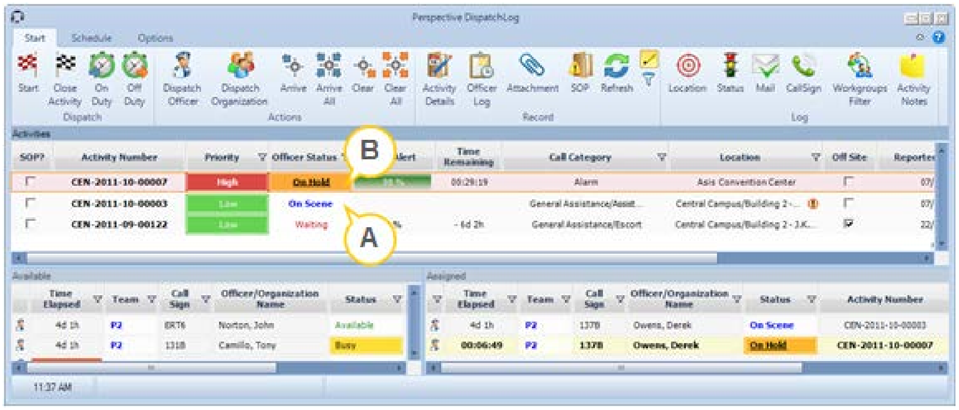
Dispatch an Officer for Multiple Activities

If you need to dispatch an officer that is currently involved in an activity (Activity A) for their next activity (Activity B), follow the steps described below:

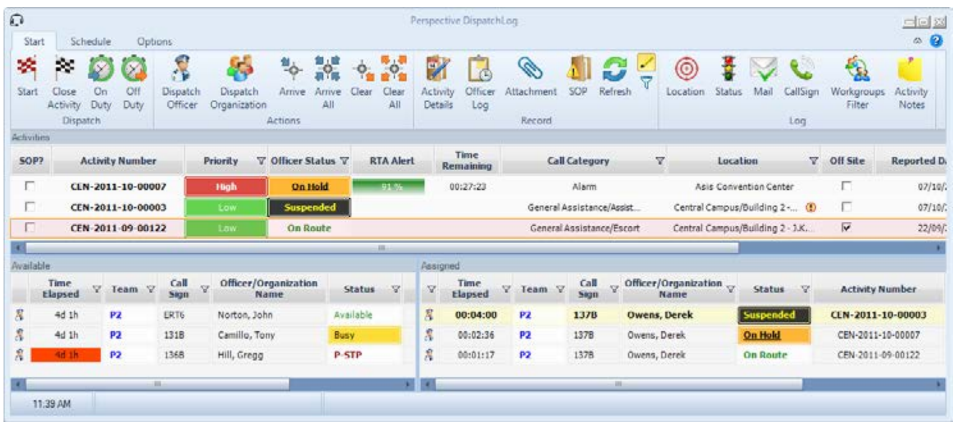
1. Drag the Officer record from the Assigned pane to the Activity B entry on the Activities pane.

2. If the officer is *On Route* or *On Scene* with Activity A, a dialog box will be displayed where you will have to decide between the following options:

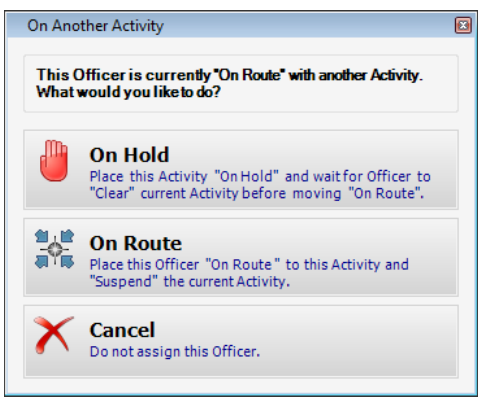
   - ***On Hold***: Wait for the officer to be cleared of Activity A before moving *On Route* with Activity B and temporarily place Activity B *On Hold*. In this case, a second record for the same officer will be created for Activity B in the Assigned pane with the *On Hold* status. When the officer is cleared from Activity A, the Officer record for Activity A will disappear from the Assigned pane and the Activity B Officer record will be automatically transferred to *On Route*.



- ***On Route***: Suspend the officer's involvement with Activity A and place them *On Route* for Activity B. In this case, the Activity A Officer record will be transferred to the *Suspended* status and a double record for the same officer for Activity B will be created with the *On Route* status. When the officer is cleared from Activity B, the Officer record for Activity B will disappear from the Assigned pane and the Activity A Officer record will be automatically transferred to *On Route*.



- ***Cancel***: Cancel the dispatch action and leave the officer's involvements unchanged.



3. Following the patterns and status modification principles described above you may dispatch one officer for as many consecutive activities as necessary.

Note: The Activity record only captures the status of the Organization record that was dispatched last.

Dispatch an Organization for an Activity

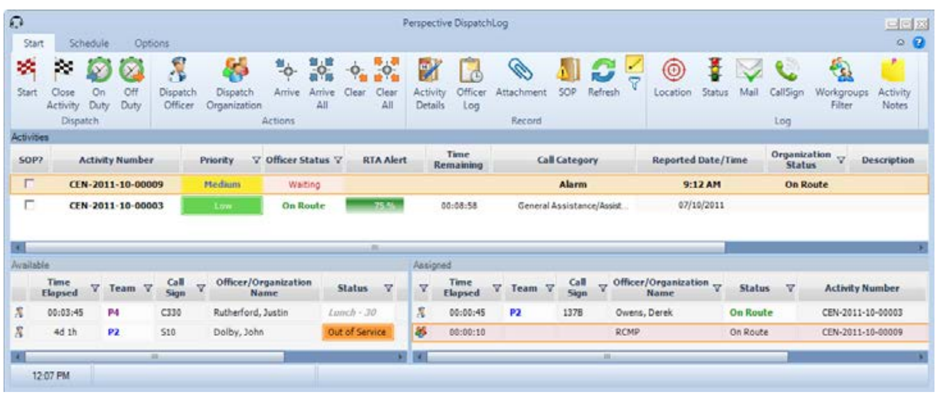
1. Select an Activity record from the Activities pane.

2. Click **Dispatch Organization** on the toolbar. An Entity List window will appear.

3. Click the green arrow icon to display all the Organization records available in Perspective's database, or enter the name of the organization in the search field and click the checkmark icon to display just the Organization records that correspond to the search word entered. Alternatively, if the entity you are looking for does not have an existing record, you may use the pick list's Quick Add function to create one.

4. Select the Organization record you want to dispatch for the activity and click **Select** .

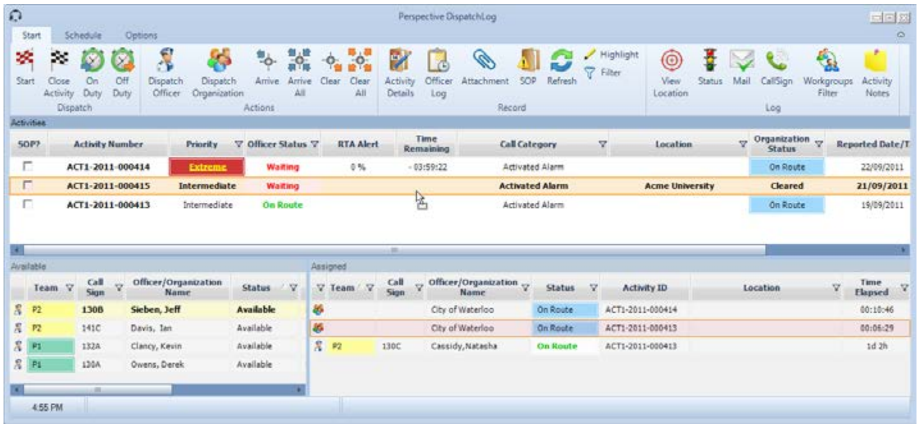
5. The dispatched Organization record will be added to the Assigned pane supplied with the relevant dispatch **Activity Number**. The **Time Elapsed** cell in the Assigned pane will start counting the time the organization has been registered in the *On Route* status. The Activity record will also be updated with the dispatched organization's status.



Dispatch an Organization for Multiple Activities

If you need to dispatch an organization that is currently involved in an activity (Activity A) for their next activity (Activity B), drag the Organization record from the Assigned pane to the Activity B entry on the Activities pane. An additional *On Route* Organization entry will be created for Activity B on the Assigned pane. You may dispatch an organization for as many activities as necessary, keeping track of all the separate dispatches with the help of the Assigned pane.

Note: The Activity record only captures the status of the Organization that was dispatched last.



Update an Officer's/Organization's Status

1. Select an Officer/Organization record from either the Available or the Assigned pane.

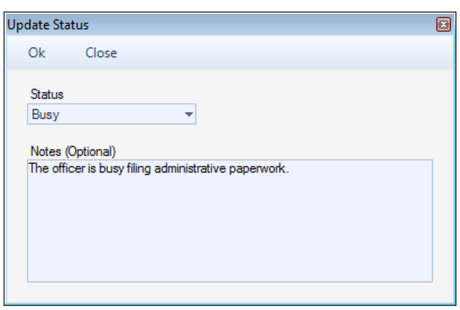
   Note: "Suspended" and "On Hold" records cannot undergo a status change.

2. Click the **Status** icon on the toolbar. An Update Status form will open.

3. Select the new **Status** for the selected officer/organization from the lookup. The choices available in the lookup will depend on the officer's/organization's current status. For instance, an "available" officer may be assigned the "Busy" or the "Out of Service" status, while an "on route" officer's status may be changed to "On Scene" or "On Hold".

4. Optionally, enter a short explanation of the status change under **Notes**.

5. To confirm the change, click the **OK** button. The status change will be reflected in the entity's entry on the Assigned pane.



You may allocate some statuses with the help of special toolbar icons. For instance, you may update an officer's/organization's status to "On Scene" by selecting their entry on the Assigned pane and clicking the **Arrive** icon on the toolbar.

Note: You may only "arrive" officers/organizations if their current status is "On Route".

To "arrive" all "On Scene" officers and organizations dispatched for a specific activity, select the Activity record on the Activities pane and click the **Arrive All** icon on the toolbar.

View or Update an Officer's/Organization's Location

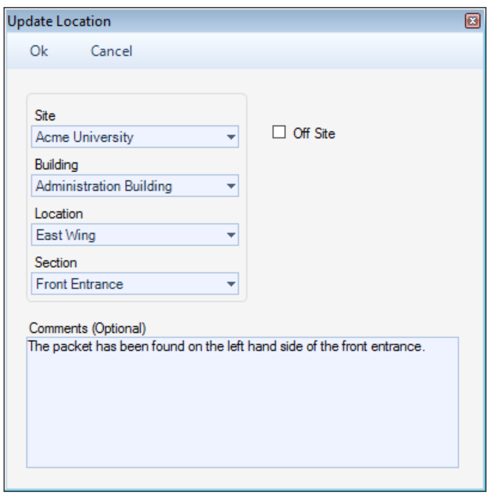
1. Select an Officer/Organization record from either the Available or the Assigned pane.

2. Click the **Location** icon on the toolbar. An Update Location form will open, displaying the current officer's/organization's location.

3. Select the new location specifications from the **Site**, **Building**, **Location**, and **Section** lookups. If the new location is off-site, check the **Off Site** box.

4. Optionally, enter a short explanation of the location change or a description of the particular location under **Notes**.

5. To confirm the change, click the **OK** button. The corresponding record will update with the new information.



Update an Officer's Call Sign

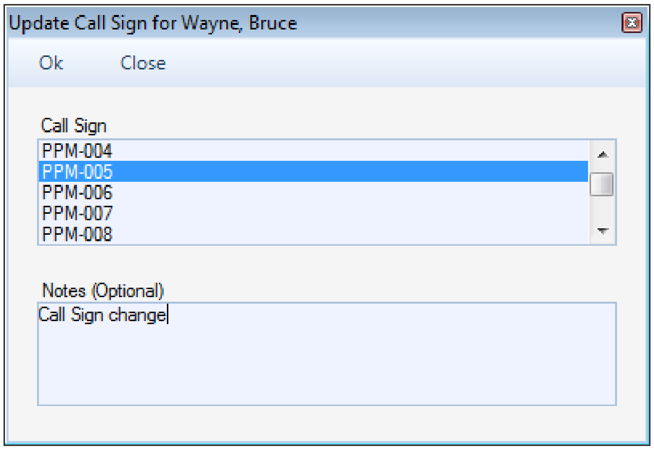
1. Select an Officer record from either the Available or the Assigned pane.

2. Click the **Call Sign** icon on the toolbar. An Update Call Sign form will open.

3. Select the new **Call Sign** for the selected officer from the list of the available abbreviations.

4. Optionally, enter a short explanation of the call sign change under **Notes**.

5. To confirm the change, click the **OK** button. The corresponding record will update with the new information.



Clear an Officer/Organization from an Activity

1. To clear an officer/organization from an activity when their involvement with the activity is complete, first select the Officer/Organization record on the Assigned pane.

   Note: Only "On Scene" records can be cleared.

2. Click the **Clear** icon on the toolbar. The cleared officer/organization will be placed back to the Available pane. The Activity record will update its corresponding officer/organization status to "Cleared" only if there are no other officers/organizations that have not been cleared from the activity yet.

3. To clear all "On Scene" officers and organizations dispatched for a specific activity, select the Activity record on the Activities pane and click the **Clear All** icon on the toolbar.

Bring an Officer Off Duty

1. Select an officer you want to bring off duty on the Available pane.

2. Click **Off Duty** on the toolbar.

3. In the confirmation pop-up window, click **Yes**. The officer will be removed from the Available pane.

System values

The following Activity Statuses are considered System values (i.e., they cannot be deleted):

- **Available**: Applies to Officers and denotes the associated Officer is available for assignment.

- **Busy**: Applies to Officers and denotes the associated Officer is on duty, but currently "busy" and cannot be assigned at this time.
- **Cleared**: Applies to Activities and denotes the assigned Officer(s) have been cleared and the associated Activity may be marked as Closed.
- **Closed - No Report**: Applies to Activities and denotes the associated Activity is closed with no report required.
- **Closed - Report Completed**: Applies to Activities and denotes the associated Activity was open, then had a report completed, causing it to close.
- **On Hold**: Applies to both Officers and Activities; denotes the assigned Officer considers the Activity "on hold" while the Officer completes his or her current assignment. This is considered a "temporary" status.
- **On Route**: Applies to both Officers and Activities; denotes the associated Officer is on route to the site of an assigned Activity.
- **On Scene**: Applies to both Officers and Activities; denotes the associated Officer is at the site of an assigned Activity.
- **Open - Report Required**: Applies to Activities and denotes the associated Activity requires a report to be completed. The Activity status can only be move to Closed either once a report is complete (i.e., **Closed – Report Completed**), or a report is no longer required (i.e., **Closed – No Report**).

  Note: To note an Activity's state further than Open or Closed, use Activity Disposition Lookup values.
- **Out of Service**: Applies to Officers and denotes the associated Officer is considered "out of service" an unavailable in the field for any assignment.
- **Suspended**: Applies to both Officers and Activities; denotes the assigned Officer was either On Route or On Scene, and was reassigned before the former Activity was cleared. The response is considered "suspended" until the officer is assigned. Once that happens, the suspended response is then cleared. This is considered a "temporary" status.

4. **Waiting**: Applies to Activities and denotes a new Activity awaiting an Officer assignment.

Additional Organizational Functions

Review Activity's Standard Operating Procedures

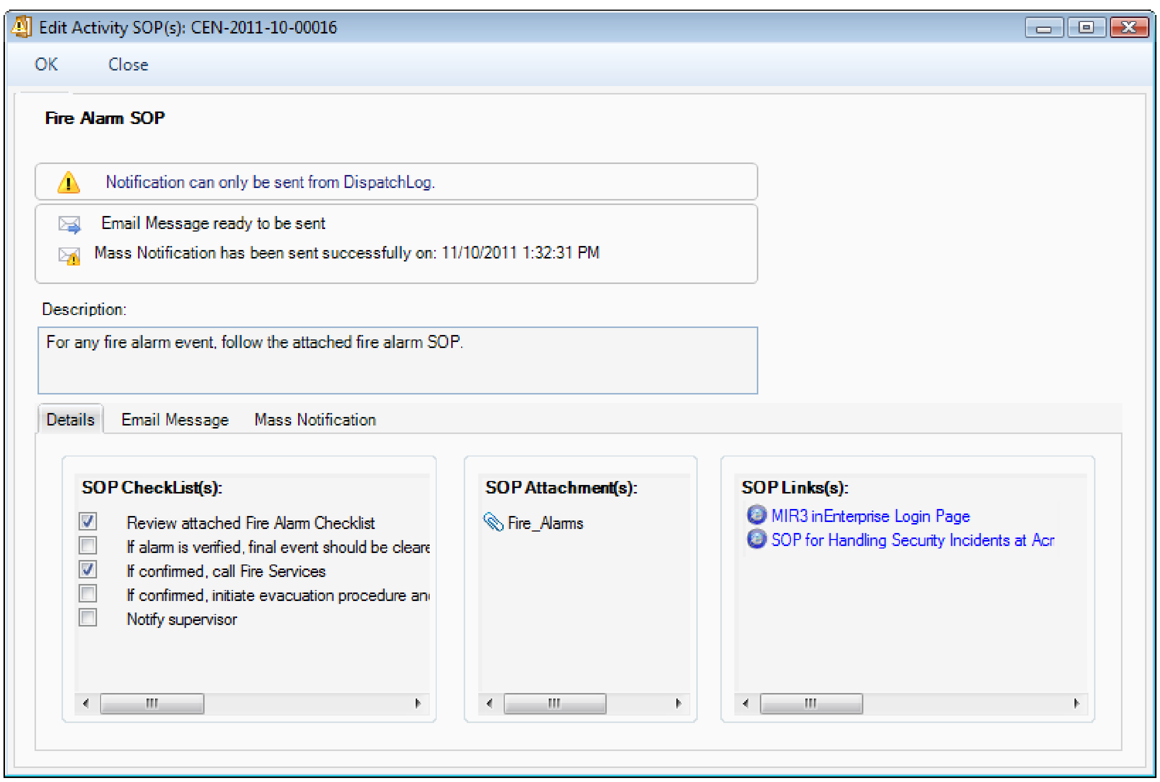
If you create or edit an activity that has been supplied with embedded SOP (Standard Operating Procedures) specifications (e.g., an Emergency activity at Site A that codes as an Extremely Important activity), the SOP window will open automatically for you to track or edit the completion of the procedures immediately. However, if you want to review the procedures at any other time, you can do so manually. For the SOP option to be active for an activity, the **SOP** box for the Activity record must be checked on the Activities pane.

1. To review an activity's Standard Operating Procedures, edit the SOP Checklist and/or send out individual email or mass notifications containing the activity's details, and click **SOP** on the toolbar. The Edit Activity SOP(s) window will open with the selected activity's Description. If notifications have been sent for the activity, the form will contain notes with the dates of the last activity notifications.

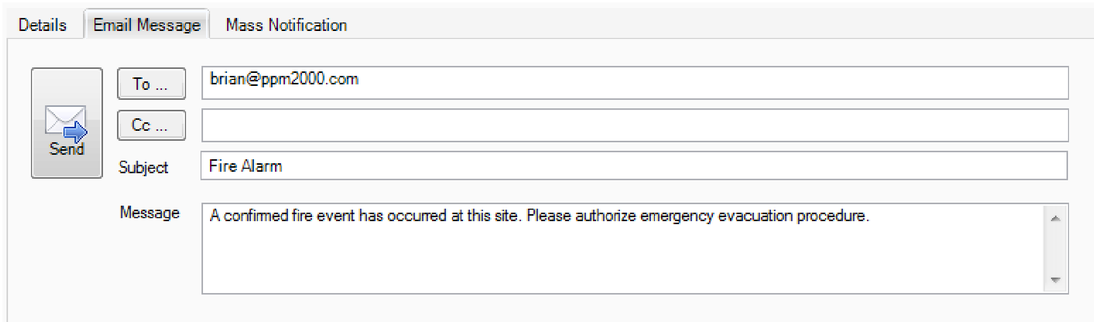
2. Check off the SOP procedures that have been completed under **SOP Checklist(s)**.

3. View the **SOP Attachment(s)** by double-clicking on the relevant attachment names.

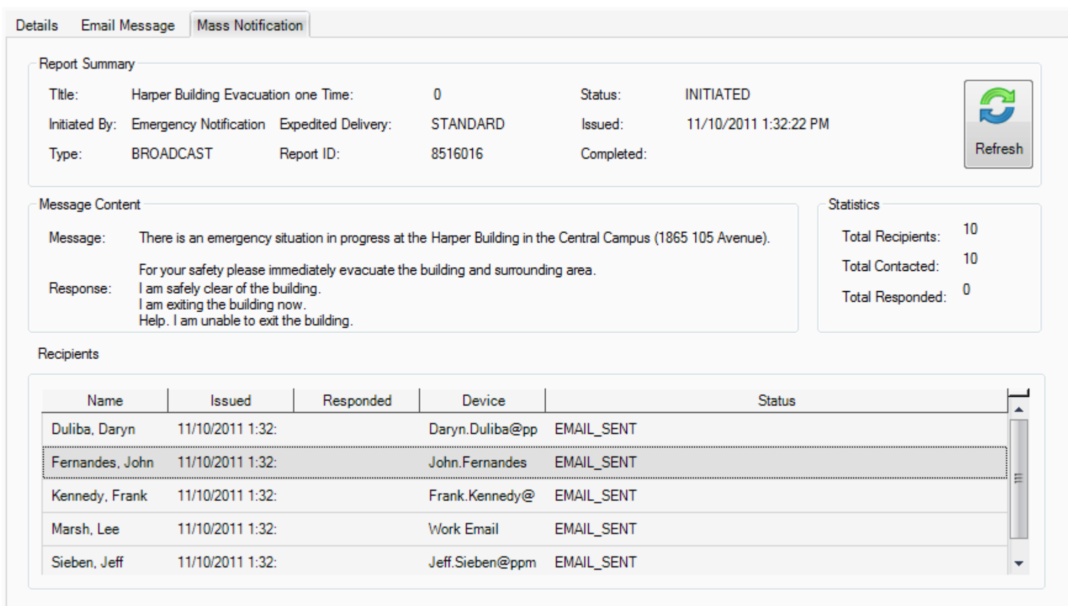
4. Click on the individual **SOP Link(s)** to open the related network locations, files, or Web links.



5. If no email notification has been sent yet, you can send individual email notifications from the **Email Message** tab. Specify **To** and/or **Cc** recipients of the notification, edit the **Subject** of the notification and the standard notification **Message**, and click **Send**. The form will capture the date and time the notification was sent.



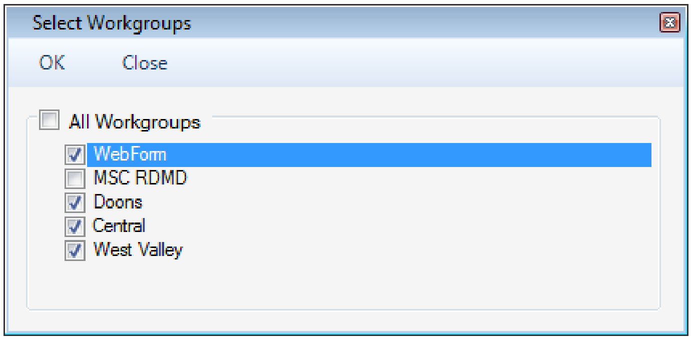
6. If no mass notification has been sent yet, you can send a mass notification from the **MIR3** tab using the MIR3℠ inEnterprise™ mass notification tool. Review the details of the mass notification and click **Send**. Each mass notification activity will be recorded under the **Recipients** grid. The form will capture the date and time the mass notification was sent, as well as the total number of recipients, and contacted and responded individuals. To refresh the common database of notifications for the selected activity, click **Refresh**.



7. To save the changes made to the SOP form, click **OK**.

Display Activities Filtered by a Workgroup

By default, the Activities pane displays Activity records for all workgroups. To filter the records for specific groups only, click the **Workgroups Filter** icon on the toolbar and select only the workgroups for which you want to display the activities. Click **OK** to confirm your choice.

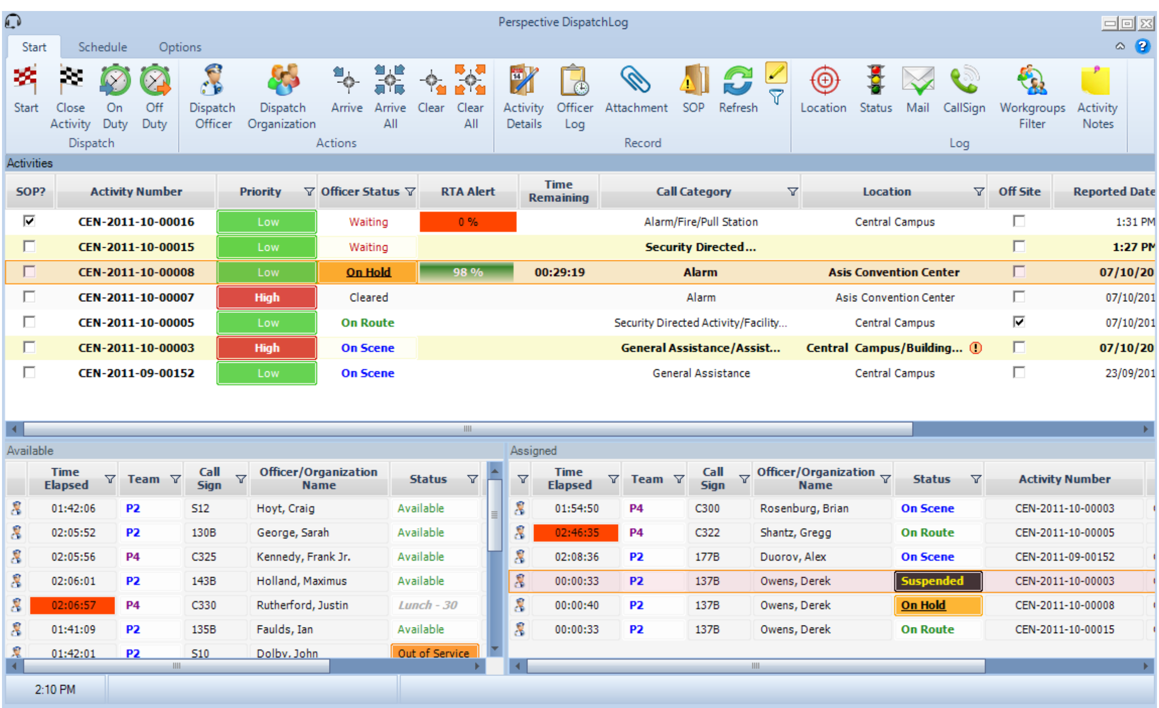


Highlight Dispatched Officers/Organizations for Activities and Vice Versa

1. To review the officers/organizations assigned to a specific activity, select the corresponding Activity record on the Activities pane and click the **Highlight** icon . All the dispatched officers/organizations that are related to the selected activity will be highlighted on the Assigned pane.

2. To review the activities assigned to a specific officer/organization, select the corresponding Officer/Organization record on the Assigned pane and click the **Highlight** icon . All the activities that are related to the selected officer/organization will be highlighted on the Activities pane.

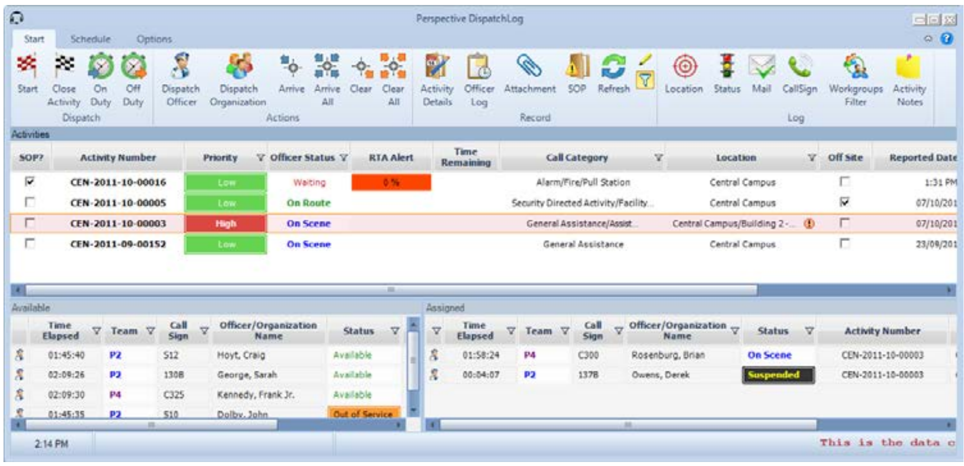
3. To cancel the highlight, deselect the Highlight icon.



Filter all Dispatched Officers/Organizations for One Activity

1. To display a list of officers/organizations assigned to a specific activity only, select the corresponding Activity record on the Activities pane and click the **Filter** icon. Only the dispatched officers/organizations that are related to the selected activity will be displayed in the Assigned pane.

2. To cancel the filter, deselect the Filter icon.



View a Complete Officer Log

1. To view a complete log of activities recorded for a specific officer in the DispatchLog database, select an officer from one of the DispatchLog panes and click the **Officer Log** icon on the toolbar.

2. If you do not select a specific officer, you will have to specify the officer in the **Officer Log Report** field by clicking the Add icon.

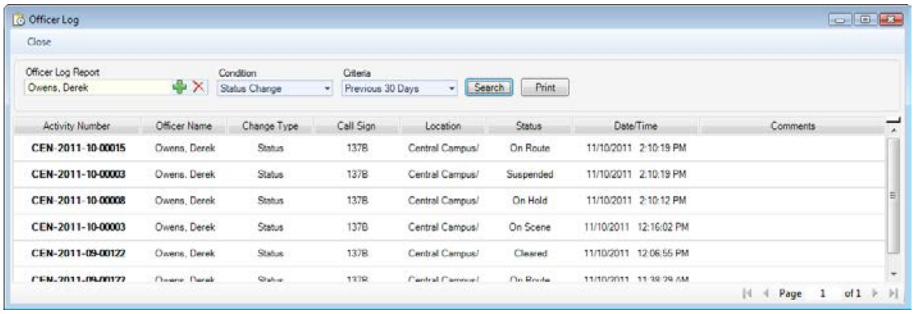
3. From the Entity List, select the officer for which you would like to view the activity log.

4. In order to display one type of the log records (e.g., Location Change, Status Change, or Call Sign Change), select the type from the **Condition** lookup.

5. To view the log records that correspond to a particular time period, select the desired time label from the **Criteria** lookup.

6. Click **Search**. The viewing pane will populate with the log records that conform with the search criteria. A typical record contains specifications of the activity number, officer’s name, activity-related change type (e.g., On Duty, Call Sign, Location, Status), call sign, location, status, time, and may/may not have a note that explains the record’s change.

7. Click **Print** to print the displayed officer log.



Clone Activities and Resources

The functions of cloning activities and resources have been designed to help the dispatcher in viewing large volumes of data. "Cloning" in the case of a pane included in the DispatchLog interface means displaying the pane in a separate window for convenient filtering, highlighting, and further manipulation.

Note: Cloning activities or resources means displaying both scheduled and current activities, and both assigned and available officers and organizations in the same list.

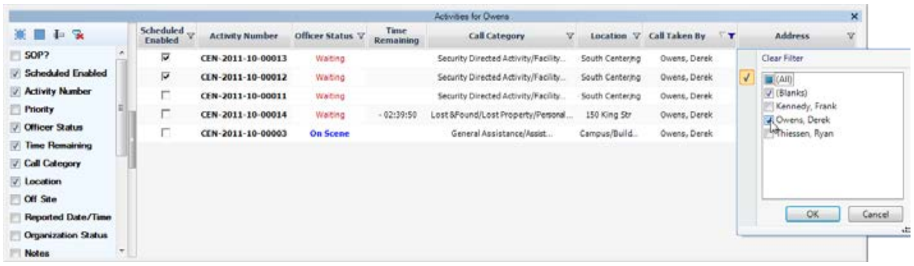
- To clone activities, click **Clone Activities** . The details of the Activity records cloned in the separate pane will include the following: the *SOP?*, *Off Site* and *Scheduled Enabled* (checked, if the activity is a scheduled activity) checkboxes, *Activity Number*, *Priority*, the last *Officer* and *Organization Statuses*, *Time Remaining*, *Call Category*, *Location*, *Reported Date/Time*, *Notes*, *Description*, *Call Taken By*, *Call Source*, *Address*, *Postal Code*, *Site Notes*, *Initiated By*, *Dispatched By*, and *Contact Number*.

- To clone resources, click **Clone Resources** . The details of the Officer and Organization records cloned in the separate pane will include the following: *Entity Type* (Officer/Organization), *Team*, *Call Sign*, *Officer/Organization Name*, *Status*, *Activity Number*, *Location*, *Start Date/Time*, *Arrived Date/Time*, *Assigned Date/Time*, and *Notes*.

- You may filter, sort, and dock the cloned panes into the DispatchLog screen together with the rest of the panes under the Start or the Schedule tab.

- To display fewer details in a cloned pane, click the vertical gray arrow button located to the left of the pane. Here you may select specific columns for display, select, or deselect all of them. You may also rename the pane, or cancel the filters previously applied to columns.

- To reset to the default view, click the **Reset View** icon on the DispatchLog toolbar.


Activities for Owens
SOP?
Scheduled Enabled
Activity Number
Priority
Officer Status
Time Remaining
Call Category
Location
Off Site
Reported Date/Time
Organization Status
Notes
Scheduled Enabled
Activity Number
Officer Status
Time Remaining
Call Category
Location
Call Taken By
Address
CEN-2011-10-00013
CEN-2011-10-00012
CEN-2011-10-00011
CEN-2011-10-00014
CEN-2011-10-00003
Waiting
On Scene
Clear Filter
(All)
(Blanks)
Kennedy, Frank
Owens, Derek
Thiessen, Ryan
OK
Cancel

Perspective Visual Analysis

Welcome to Perspective Visual Analysis™, an optional component of Perspective by PPM. Perspective not only records and tracks incident data, but assesses and analyzes it to chart trends and report statistics. Visual Analysis complements Perspective by enabling it to render data relationships into powerful visual elements.

The resulting visual data can be easily analyzed and interpreted, bringing clarity to complex investigations and scenarios. Seemingly unrelated events are mapped, and new connections are found. Perspective Visual Analysis significantly increases the productivity of your investigators saving time and resources along the way.

Use Visual Analysis to Build a Link Chart

Using dynamic link analysis, Perspective Visual Analysis reveals the complex, and seemingly disparate, associations hidden amidst hundreds, even thousands, of incidents, cases, items, persons, organizations and vehicles.

The complex relationships that exist between your data are mapped in easy-to-read link charts. You can zero in on specific information, or keep expanding the web until all avenues have been explored. To save, print, or copy your link charts, transfer them into **IBM i2 ChartReader** and continue to view the associations in your Perspective data.

Perspective Visual Analysis was developed in an exclusive partnership between PPM 2000 and IBM i2—the world's leading provider of Visual Investigative Analysis software for law enforcement, intelligence, military, and Fortune 500 organizations. All of the visualizations created in Perspective Visual Analysis can be carried into IBM i2 applications, including **Analyst's Notebook**. From there, you can connect to other databases in your organization for advanced analysis and in-depth visual analytics.

For more information on IBM i2 products, or to download i2 ChartReader, visit the following links:

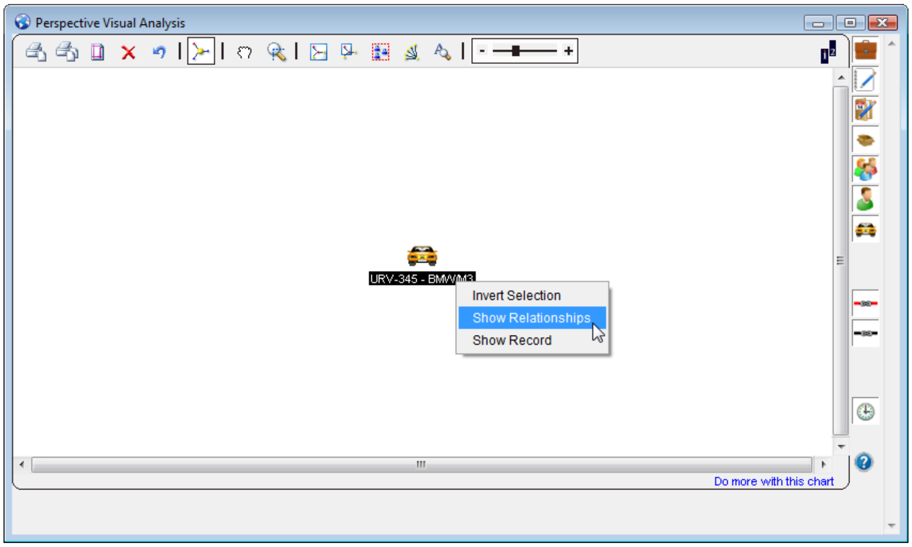
- Short link:
  http://ibm.co/W8rK1l.
- Long link:
  http://www14.software.ibm.com/webapp/download/nochargesearch.jsp?S_TACT=&S_CMP=&s=&k=ALL&pid=&q=Chart+Reader+&ibm-search=Search&pf=&b=&q0=.

Access Perspective Visual Analysis

5. Log on to Perspective.
6. In the Navigation pane, open the **Data Forms** component and choose the record entity that you want to view (i.e., Activities, Incidents, Cases, Items, Persons, Organizations, or Vehicles).
7. Set your record view for the Listing pane using the **Quick View**, **Saved Views**, or **All Records View** function. If your Perspective system contains a large number of records, it is recommended that you use the Quick View or Saved Views function.
8. In the Listing pane, find and select the record you want to build your link chart from.
9. Click the **Visual Analysis** icon on the Ribbon. A separate window for Perspective Visual Analysis will open with the selected record displayed as an icon in the center.

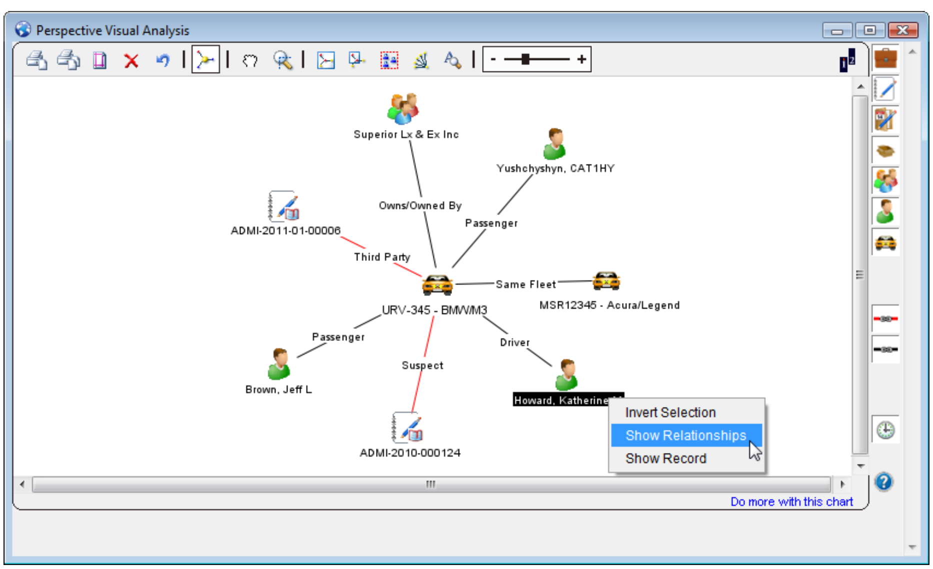
Create a Link Chart

1. Right-click the icon in the center of the Visual Analysis window, and select **Show Relationships**.



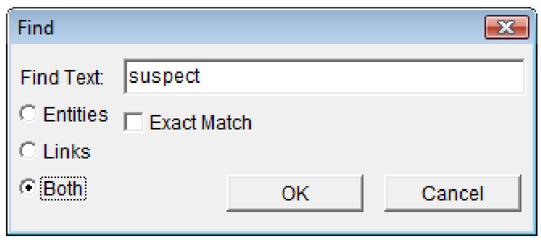
2. A link chart of related records will appear in the window, with the original record at the center. Right-click any icon in the link chart, and then select one of the following options:

- **Invert Selection**: Selects all records except the current one.
- **Show Relationships**: Displays all Incident, Case, Item, Person, Organization, or Vehicle records linked to the selected record.
- **Show Record**: Opens the selected record in Perspective. (The Visual Analysis window may still be open in the foreground. In this case, minimize the Visual Analysis window to view the record in Perspective.)



3. Click on the top toolbar options to customize the appearance of your chart for clear visual analysis, or to find, select, or remove a particular record from your chart:

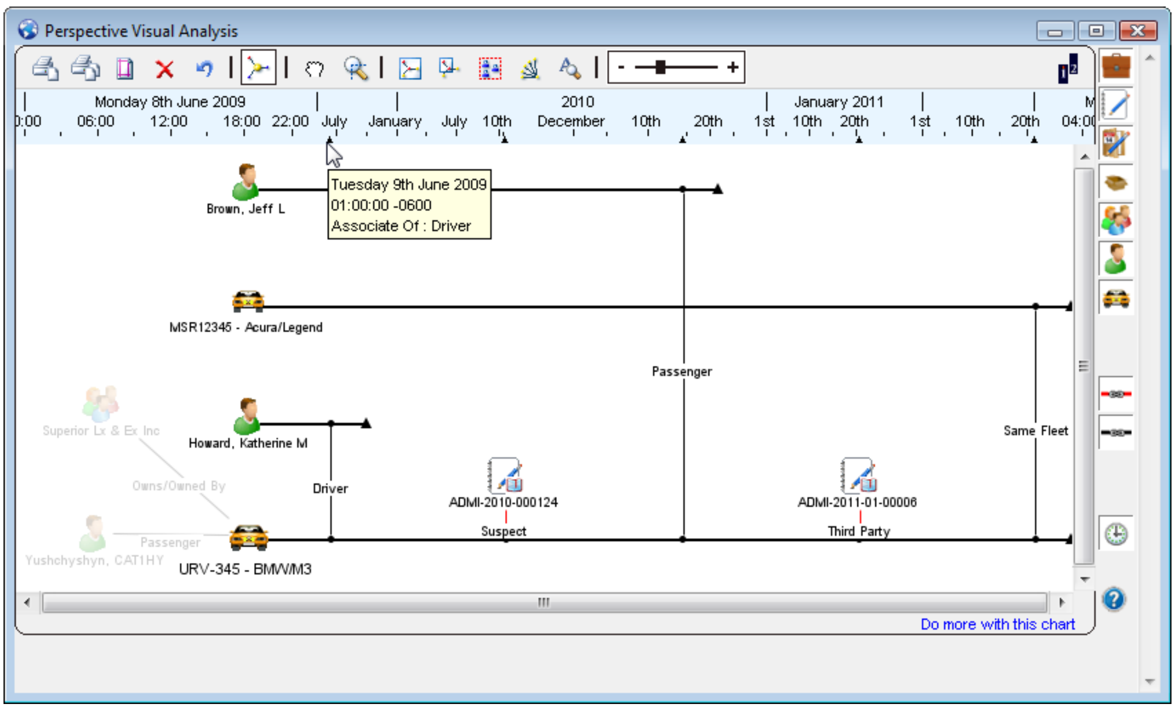
Print on Single Page	Prints all details of your chart on a single page.
Print at 100% Scale	Prints your chart at 100% scale, which would usually occupy more than one page.
Page Setup	Enables you to adjust margins and page setup settings before printing.
Delete Selection	Removes the highlighted record(s) from the chart.
Undo Delete	Brings back the record(s) that were just deleted.
Key Entity Emphasis	Enlarges the central records in your link chart placing focus back on them. Click again to restore the central records to regular size.
Panning Tool	Enables dragging of the entire link chart allowing you to quickly view different areas of the chart.
Zoom to Area	Click the Zoom to Area button, and then click and drag on the chart to select an area with the help of the mobile zoom box. The window will fill with an enlarged display of the selected area.
Fit to Window	Fits the entire link chart in the window, making it easier to see the overall shape and the number of connections in the chart.
Fit Selection to Window	Click and drag on the chart to select an area of interest with the help of a box. Alternatively, select multiple records holding down the Ctrl key while clicking the record icons. Then, click the Fit Selection to Window button. The window will fill with all records that are currently selected in the link chart.
Select All	Selects all the records in the link chart.
Reorganize	Changes the arrangement of the record icons restoring the link chart to its original layout.

Find	Searches for a chart entity and/or link that contains a particular string of text. The Find function only searches the text displayed in the window; it does not search actual records. Once you click the Find button, the Find dialog will open. a. Type the search text in the **Find Text** field. b. Choose to search **Entities** (e.g., incident numbers, person names, license plate numbers), **Links** (e.g., suspects, associates, subjects of interest), or **Both**. c. Select **Exact Match** to only search for text that matches the search string precisely. d. To execute your search, click **OK**. The window will select and zoom in on any entities and/or links matching your search criteria. 
Zoom	Click and drag the slider back and forth to zoom the window in and out.

4. Click the buttons on the right toolbar to hide particular entities from your link chart. By default, these entities are displayed in your link chart. Click again to restore the original link chart layout and/or to re-display the entities.

Case	Hides cases from your link chart.
Incident	Hides incidents from your link chart.
Activity	Hides activities from your link chart.
Item	Hides items from your link chart.
Organization	Hides organizations from your link chart.
Person	Hides persons from your link chart.
Vehicle	Hides vehicles from your link chart.
Involvements	Hides involvements from your link chart. Involvements, represented by red connecting lines, show that an item, organization, person, or vehicle was involved in a particular incident (e.g., Suspect,

	Responding Service, Indirectly Involved).
Associations	Hides associations from your link chart. Associations, represented by black connecting lines, show that particular incidents, cases, items, organizations, persons, or vehicles are associated with each other by relationship or ownership (e.g., Alias, Contracted To/By, Similar M.O.).
Timeline	Transfers your link chart into the timeline mode (see the image below). All entities and links will be reorganized sequentially, allowing for time series analysis.



Use IBM i2 ChartReader to Manipulate Your Link Chart

After using Perspective Visual Analysis to build and develop your link chart—customizing its appearance to suit your needs—you can use IBM i2 ChartReader to share your chart with other people in your organization, or at the very least, to save or print your chart for access at a later date.

If ChartReader is not already installed on your computer, you can download the product from the IBM i2 website:

- Short link:
  http://ibm.co/W8rK1l.

- Long link:
  http://www14.software.ibm.com/webapp/download/nochargesearch.jsp?S_TACT=&S_CMP=&s=&k=ALL&pid=&q=Chart+Reader+&ibm-search=Search&pf=&b=&q0=.

ChartReader offers many of the same navigation functions as Visual Analysis, allowing you to zoom in and out on particular areas of your chart, resize your chart to fit your screen, and search for information contained within your chart. However, ChartReader does not have any editing functionality. You cannot add, eliminate, or reorganize chart items, and you cannot access any of your Perspective data to supplement your chart.

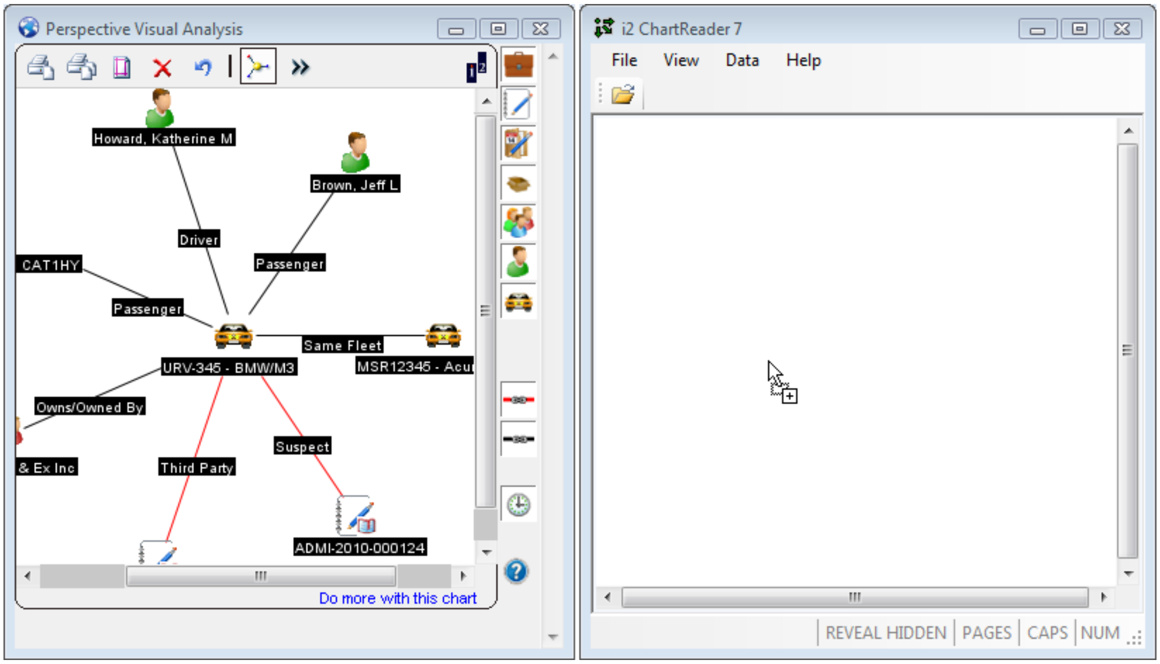
Ensure that your chart is complete when you transfer it into ChartReader, and then simply use ChartReader to do the following:

- Save your chart for later access.
- Print your chart using a variety of page configuration and printing options.
- Copy and paste your chart into Windows® applications, including Microsoft® Word, PowerPoint®, and Excel®, for inclusion in reports and other documents.

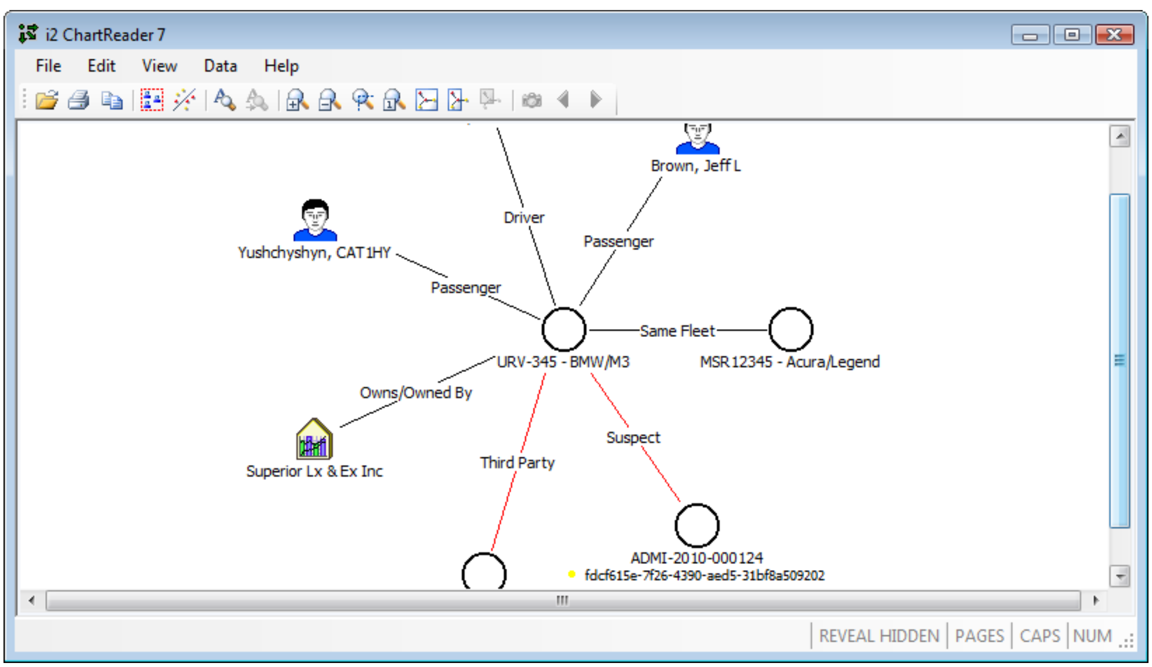
In other words, use Perspective Visual Analysis to create and develop your visual research, and then employ ChartReader to document it and distribute it to others.

Transfer Your Link Chart into IBM i2 ChartReader

1. Launch **ChartReader**.
2. Using the record selection options described in the "Create a Link Chart" chapter, select the chart items you would like to transfer into ChartReader.
3. Drag and drop the link chart selection into the ChartReader blank window.



4. A status bar will appear, indicating that ChartReader is in the process of transferring your link chart. ChartReader uses another IBM i2 product, **Online iLink**, to retrieve data from online sources. When the bar disappears, your link chart will appear in the ChartReader window. There may be some differences in the icons used to represent the chart's entities.



5. Open the ChartReader's **Help menu** to learn how to save, copy, and print your chart, as well as how to perform other relevant charting functions.

Additional IBM i2 ChartReader Resources

In addition to the **online Help** provided in ChartReader, the following documents are included with ChartReader's download in PDF format:

- ***Embedding in a Web Page***: Contains instructions for embedding charts into Web pages.
- ***User Guide***: Provides detailed information about working with ChartReader.
- ***Release Notes***: Includes information on ChartReader's latest features and updates.
- ***i2 Online iLink Release Notes***: Supplies details on Online iLink's most recent release. Online iLink is the program used to transfer data from Perspective Visual Analysis to ChartReader.

For more information on IBM i2 and its products, visit the links below:

- Short link:
  http://ibm.co/W8rK1l.
- Long link:
  http://www14.software.ibm.com/webapp/download/nochargesearch.jsp?S_TACT=&S_CMP=&s=&k=ALL&pid=&q=Chart+Reader+&ibm-search=Search&pf=&b=&q0=.

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PPM 2000

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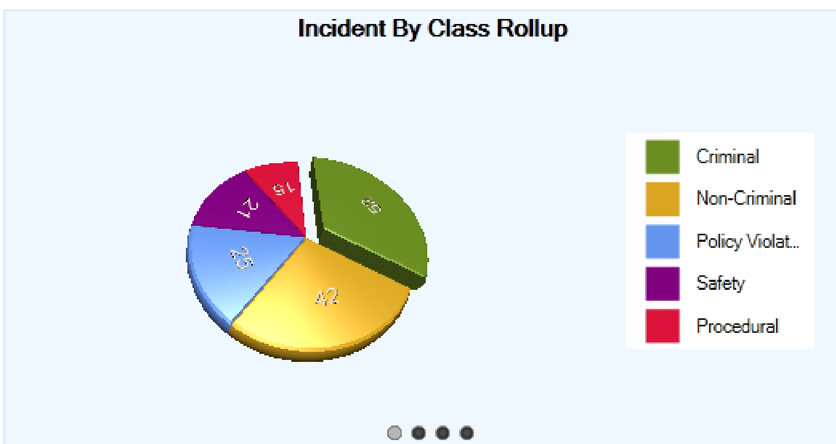
Phone:	(780) 448-0616
Fax:	(780) 448-0618
Email:	information@ppm2000.com
Website:	www.ppm2000.com

Appendix A: Dashboard Chart Types

The Dashboard component of Perspective can be populated with up to four charts that show trends and statistics for a selected portion of records found in Perspective's database for a specified period of time. The data you may select for display include the following chart types.

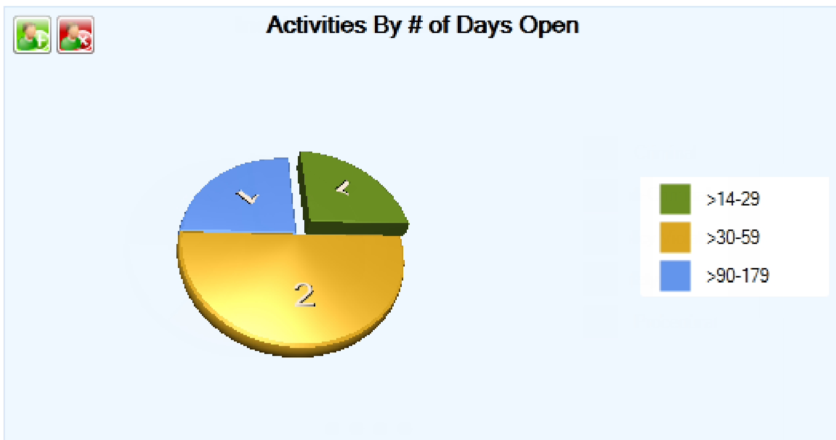
Incident by Class	Displays the number of incidents by the specified number of incident classes (e.g., Criminal, Procedural, Policy Violation) that have taken place during the specified period of time.
Incident by Business Unit	Displays the number of incidents by the specified number of business units (e.g., North America, Europe, Asia) that have taken place during the specified period of time.
Incident by Site	Displays the number of incidents by the specified number of sites (e.g., Alberta, Ontario, British Columbia) that have taken place during the specified period of time.
Incident by Organization	Displays the number of incidents by the specified number of organizations (e.g., Edmonton, Leduc, Sherwood Park) that have taken place during the specified period of time.



Activities by Number of Days Open	Displays the number of activities with an "Open" status arranged by the set periods of time for which the Activity records have been open (e.g., >14-29 days, >30-59 days).
Cases by Number of Days Open	Displays the number of cases without a Closed Date/Time arranged by the set periods of time for which the Case records have been open.

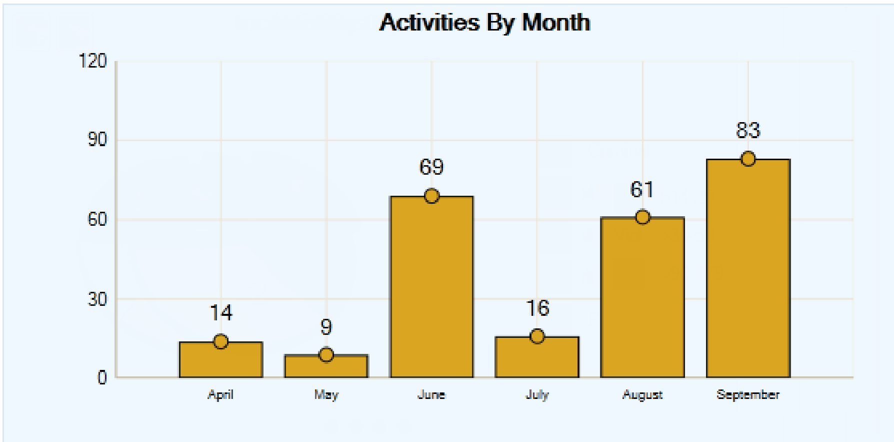
Incidents by Number of Days Open	Displays the number of incidents with an “Open” status arranged by the set periods of time for which the Incident records have been open.
Investigations by Number of Days Open	Displays the number of investigations without a Closed Date/Time arranged by the set periods of time for which the investigations have been open.

When one of these charts is displayed on the Dashboard, you may choose to view the Activity/Case/Incident/Investigation data filtered for a specific user. To filter the Activity data for a Record Owner, the Case, the Incident data for a Case Investigator/Case Manager/Case Supervisor, or the Investigation data for an Investigator, click on the plus icon in the chart section and select the required user from the entity list. To reset the filter and show the data that applies to all users in the system, click the x icon .



Activities by Month	Displays the number of the specified portion of activities that have been recorded in each of the twelve months of the selected year. If no data has been recorded for a specific month, it will be absent from the chart.
Incidents by Month	Displays the number of the specified portion of incidents that have been recorded in each of the twelve months of the selected year. If no data has been recorded for a specific month, it will be absent from the chart.
Investigations by Month	Displays the number of the specified portion of investigations that have been recorded in each of the twelve months of the selected year. If no data has been recorded for a specific month, it will be absent from the chart.

Cases by Month	Displays the number of the specified portion of cases that have been recorded in each of the twelve months of the selected year. If no data has been recorded for a specific month, it will be absent from the chart.

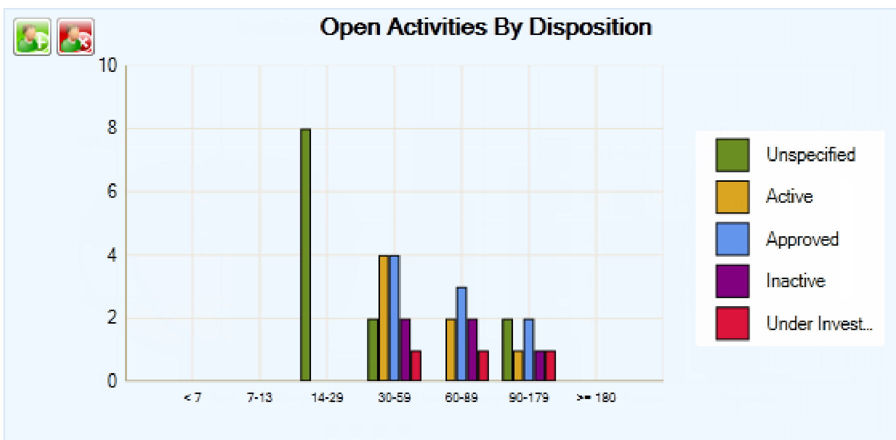


Loss by Month	Shows the monetary losses (Total Loss, Total Recovered, and Net Loss), in dollars, resulting from the selected portion of incident activity in each of the past twelve months of the specified year. This chart is only available in the bar chart form.

Open Activities by Disposition	This preset chart does not have any further chart settings and is only available in the bar chart form. It displays the number of activities with an "Open" status colour-coded for specific Disposition (e.g., Under Investigation) and arranged by the set periods of time for which the Activity records have been open (e.g., >14-29 days, >30-59 days).

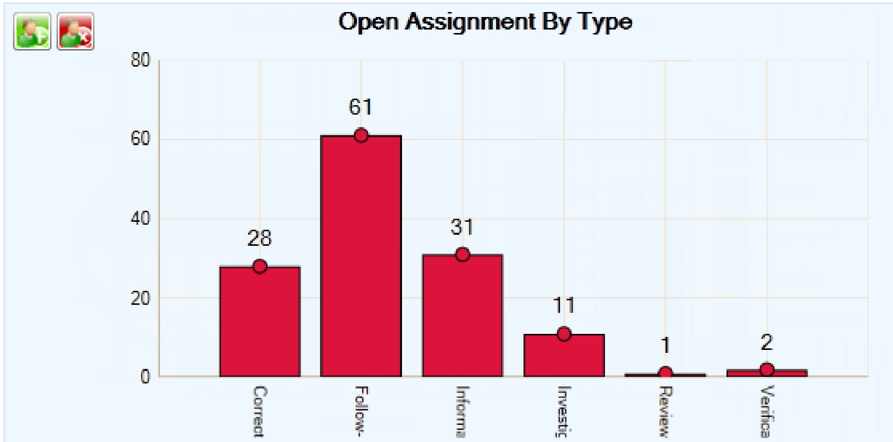
Open Incidents by Disposition	This preset chart does not have any further chart settings and is only available in the bar chart form. It displays the number of incidents with an “Open” status colour-coded for specific Disposition (e.g., Unsolved) and arranged by the set periods of time for which the Incident records have been open.
Open Cases by Disposition	This preset chart does not have any further chart settings and is only available in the bar chart form. It displays the number of cases without a Closed Date/Time colour-coded for specific Disposition (e.g., Active) and arranged by the set periods of time for which the Case records have been open.

When one of these charts is displayed on the Dashboard, you may choose to view the Activity/Case/Incident data filtered for a specific user. To filter the Activity data for a Record Owner, or the Case or Incident data for a Case Investigator/Case Manager/Case Supervisor, click on the plus icon in the chart section and select the required user from the entity list. To reset the filter and show the data that applies to all users in the system, click the x icon .



Open Assignments by Due Date	Displays the number of assignments that have not been checked off as “Completed” arranged by their closeness to the Due Date (e.g., Overdue, Tomorrow, Others).
Open Assignments by Type	Displays the number of assignments that have not been checked off as “Completed” arranged by specific assignment Type (e.g., Correction Notice, Information Request).

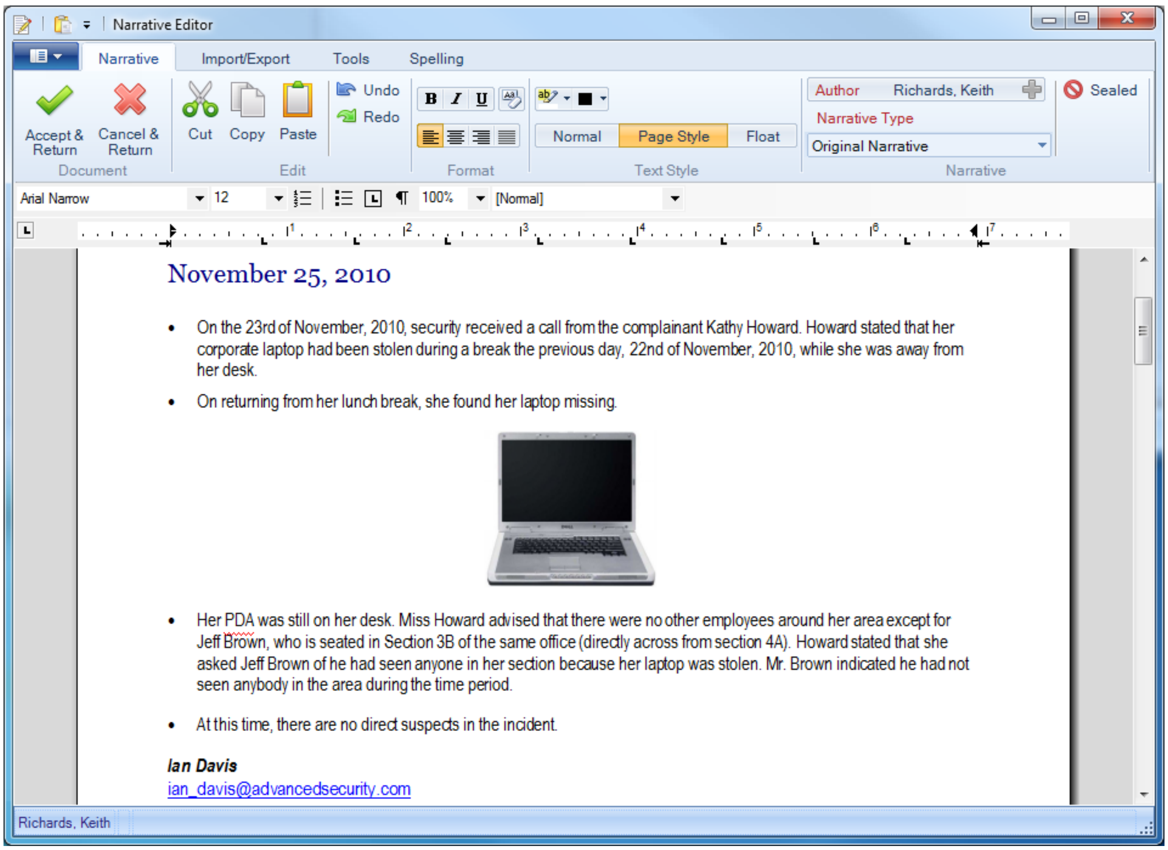
When one of these charts is displayed on the Dashboard, you may choose to view the Incident, Case, and Activity assignment data that have been filtered for a specific recipient of assignments. To filter the data for a specific “Assigned To” user, click on the plus icon in the chart section and select the required user from the entity list. To reset the filter and show the data that applies to all users in the system, click the x icon .



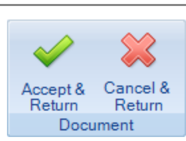
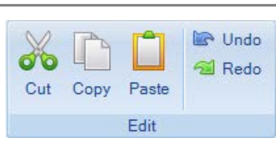
Perspective Gauge	Resembles an automobile speedometer gauge, displaying the proportion of the number of incidents that has been recorded for the current year to the number of incidents that had been recorded in the year of your selection effectively comparing the two values. You can change the “compared to” year using the chart’s attached lookup. The **Total Year** diagram compares the number of incidents for the total calendar years (e.g., the periods of January 1 to December 31). The **Year to Date** diagram compares the number of incidents for the years to the current date (e.g., if today’s date is October 1, then it will compare the periods of January 1 to October 1 only). The **This Month** diagram compares the number of incidents for the current month (e.g., if today is October, then it will compare the months of October only).

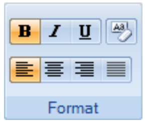
Appendix B: Text Editor Navigation

In Perspective, there are four types of text editor windows: **Narrative Editor**, **Summary Editor**, **Interview Editor**, and **Send Message.** The corresponding editors enable entering and editing of (typically) large texts that convey incident or case narratives, investigation summaries and interviews, and descriptive email messages. Typing the content of a narrative, summary, interview, or email, you can format your text with any of the options available under the editor's tabs (e.g., Narrative, Import/Export, Tools, and Spelling).

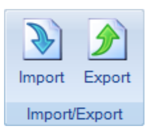


Narrative/Summary/Interview tab

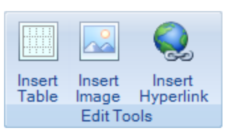
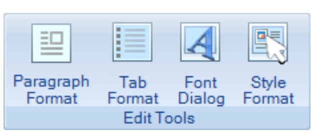
	Click **Accept & Return** to save the changes made to the document and return to the main screen of the entry. If you want to discard the changes made, click **Cancel & Return**.
	Edit position of parts of the entered text by selecting the portion of the text and applying the **Cut**, **Copy**, or **Paste** options. The **Undo** and **Redo** buttons toggle the changes you have made to the document.

	Format appearance of the text by making it **bold**, **italic**, or **underlined**. **Clear** the formatting as needed. Apply the **centered**, **left**, **right**, or **justified** text alignment.
	Choose the text **highlight** and **font color**. Toggle document views, choosing between the **Normal**, **Page Style**, or **Float** (default) view.
	The **Sealed** option is available in the Narrative, Summary, and Interview Editors only. It functions similarly to the Seal/Unseal button  in the Viewing pane, by which clicking on it removes/assigns editing rights from/to the text. *Note: Once you seal the text, and then save and leave the corresponding record, it can never be unsealed.*

Import/Export tab

	Alternatively to entering the text yourself, you may choose to **Import** an existing text document and its formatting into your text field. When finished with editing the text, you may also **Export** the text as an autonomous text document in multiple text formats.

Tools tab

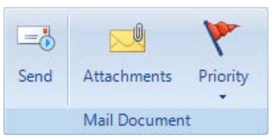
	To enhance the content of your text, you can insert **tables**, **images**, and **hyperlinks**. To display editing options of the default table frame, select the portion of the table you want to edit and click the **Insert Table** button again.
	To edit the structure of your text, use the various **Paragraph** and **Tab Format** options. To format the font of your text and edit available text styles, use the **Font Dialog** and **Style Format** dialogs. Some of the most important text editing functions (e.g., text font, size, style, numbering, tabbing, visibility of formatting symbols) are also accessible directly from the autonomous toolbar that is located above the text field and that is not a part of any one particular tab.
	If you want to print your document, click the **Print** button. To preview the document before printing, click **Print Preview**.

Spelling tab

	Although the spell check option is automatically applied to the text you enter (the incorrect text is underlined with a red wavy line), you can correct each spelling error one by one using the **Spelling** dialog box.

Additional Send Message options

The Send Message editor provides very basic options for editing a short email message that are all collected under one **Mail** tab. Typically, this message serves the purpose of providing some description to an automatically generated attachment that is sent out with the email (e.g., a record view or an assignment). In this case, the descriptive text will be provided by the system. If you want, you may, however, edit the default text for it to correspond to the document requirements set at your organization.

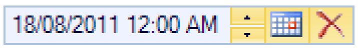
	To add an attachment to your email or view it, click **Attachments**. A window will appear where you can add or remove existing attachments. Click **Proceed** to return to the main message screen. To set a priority for the message you are sending, click **Priority** and select from the High, Normal (default), and Low priority option. When finished with editing of your email message, click **Send**.
	If you want to format the message details in plain text rather than the default HTML table, unclick the **Format** button. By default, the formatting option is active.

Appendix C: Data Field Types

Yes/No Fields

Yes/No fields include both checkboxes and radio buttons. Click a checkbox or radio button to select it. Once selected, checkboxes will contain a checkmark and radio buttons will contain a dot.

Date/Time Fields

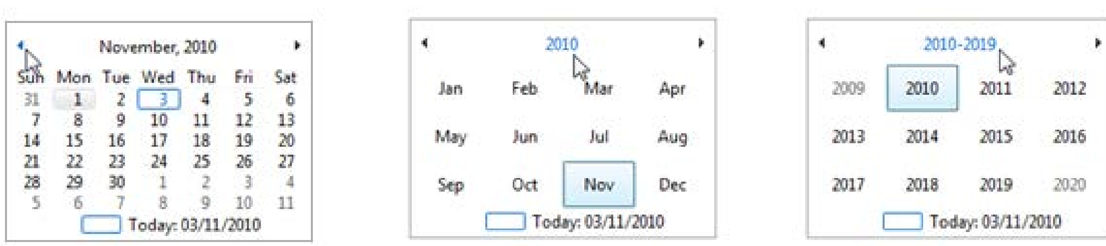


To enter a date in a Date/Time field, you have the following three options:

- Manually type the date in the field in MM/DD/YYYY format. Place your cursor in the month section and type two digits for the month, two for the day, and four for the year, using leading zeros if necessary. Specify the time in TT:TT format adding AM or PM, if relevant.
- Place your cursor anywhere in the date or time field and click on the **up** and **down arrows** attached to the field to increase or decrease the time value accordingly.
- Choose the appropriate date from the field's built-in **calendar**.

To display the field's calendar, click the calendar icon to the right of the Date/Time field. The calendar will open on the current month and year with the current day highlighted. Use the adjacent scrolling arrows to adjust time, month, or year.

If you are running Windows XP or Windows Vista, you may quickly advance the calendar to a different month or year. Click the appropriate time label to display a list of all the months in the year (or years) in a decade. Select the desired month or year to advance to the next level of time hierarchy (i.e., day or month).



After selecting a date, the calendar will close and the Date/Time field will automatically populate with the selected date, while the time portion will display 12:00 AM (or 00:00, depending on your machine's regional settings).

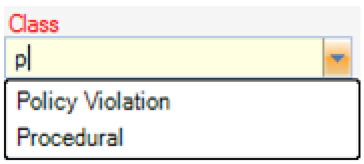
Note that at any time, you may select the current date by clicking the date marked Today at the bottom of the calendar, or by right-clicking the calendar and selecting "Go to today".

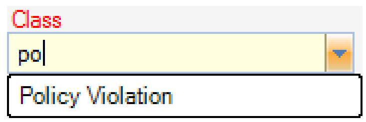
To clear the field of all values, click the Remove button to the right of the Calendar icon.

Lookup List Fields

To display all options contained within a lookup list, simply click the down arrow beside the lookup field or use the keyboard shortcut Alt+↓.

For more efficient data entry, you may automatically narrow focus in any lookup list to values beginning with the letters that you type. Simply start typing the value appropriate for the lookup field to display a lookup list containing only those values that begin with the letter(s) that you have typed.

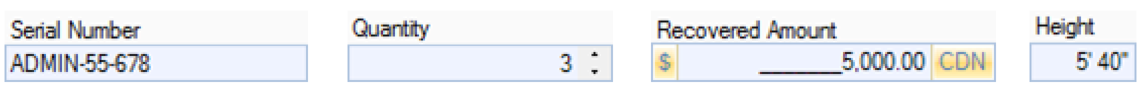




If you are changing a lookup field value, you may hit the Esc key at any time to populate the field with the value that was saved previously.

Note: If the lookup field is part of a hierarchy, any unsaved field values lower in the hierarchy may be erased.

Number Fields



Perspective includes number fields for both whole numbers and numbers with up to two decimal places, as well as special fields configured for height, weight, value, and year data.

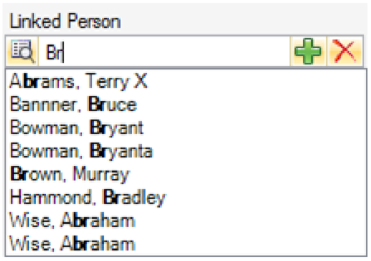
In any of these fields, you may type the desired value directly in the field. If up and down arrows are available, you may use them to adjust the value by increments of one.

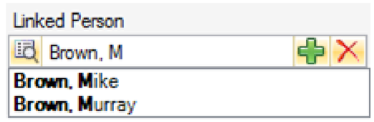
Pick List Fields

Pick list fields can be populated with values linked from the common database. There are two ways to link a pick list field to a value from the database.

First, you may start typing an approximate value directly in the pick list field to display a list of records showing only those values that contain the letter(s) that you have typed.

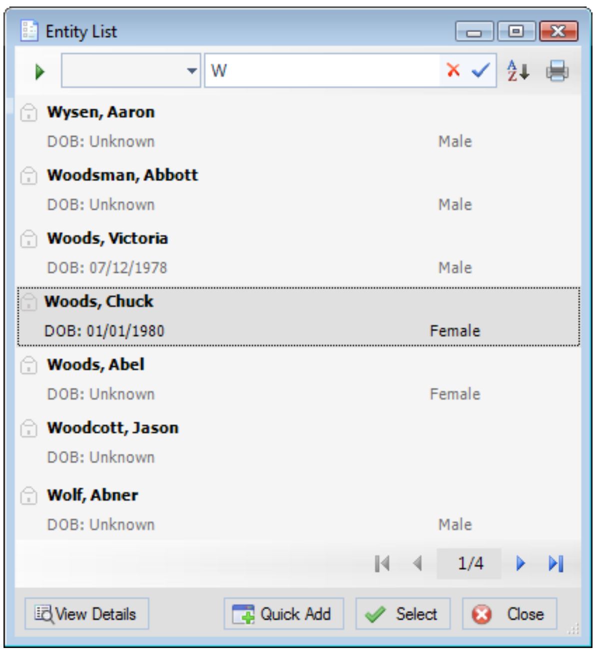
Note: This option is not available if you are selecting an Investigator.





Second, you may select the data entry from the appropriate Entity List that opens when you click the Add icon to the right of the field.

Note: Some Person pick lists only allow persons designated as Perspective users, or Perspective users with specific privileges (e.g., Investigators) to be selected. In these pick lists, all persons available for selection will automatically be displayed in the window, and there will be no option to change the view.



- If you have a default view specified for the data entity, this view will be displayed in the pick list. If not, the window will be blank. You may select or change the view by choosing a preset view from the Entity List lookup. To reset the view to display all records, click the green arrow icon .
- To find a specific user in the list, start typing the name in the search field to automatically filter the user list by the letter(s) that you have typed. To apply the filter, click the checkmark icon . To remove the filter, click the clear icon and then the checkmark icon to view the original list.
- To arrange the list alphabetically, click the A to Z icon .
- To print the list, click the Print icon .

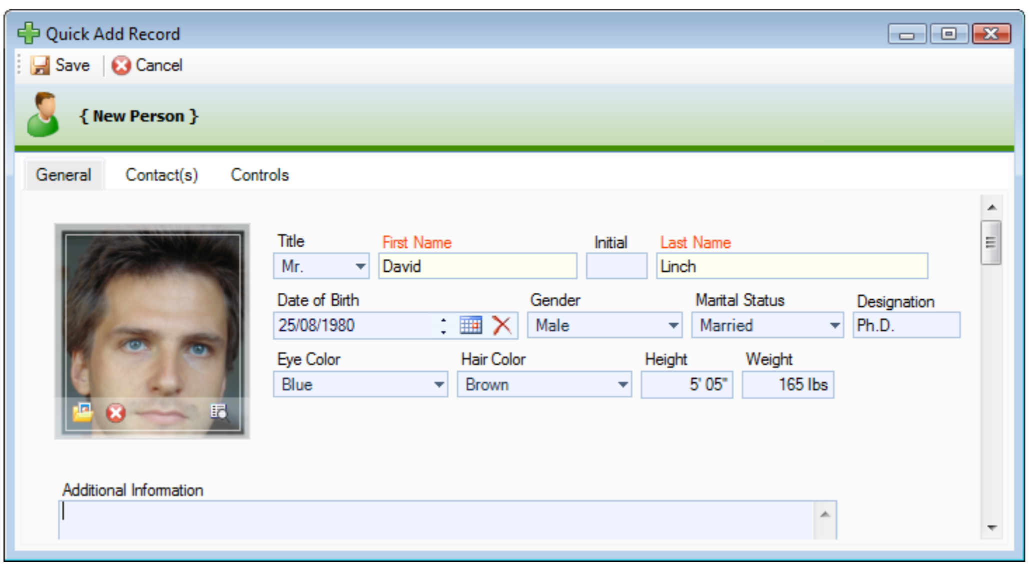
- To quickly view a particular entity's record, select the entity in the pick list and click the **View Details** button located at the bottom of the dialog box. The record will open in read-only mode in a separate window. Close the window to return to the pick list.

  Note: If you do not have permission to view a particular entity's record, the View Details button will be grayed out when you select the entity.

- Once you have found the correct entity, double-click it, or select it in the pick list and click the **Select** button. The pick list window will close and the field will populate with your selection.

- Alternatively, if the entity you are looking for does not have an existing record, you may use the pick list's Quick Add function to create one. Click the Quick Add button, and a blank data form will open in a separate window. Enter all known information, ensuring that all required fields (marked red) have been populated, and click Save when you are finished. The Quick Add form and the pick list window will close, and the field will populate with your entry. You can further edit your entity from there.

  Note: The Quick Add function is only available in Item, Person, Organization, and Vehicle pick lists. Further, some Person pick lists only allow persons designated as Perspective users, or Perspective users with specific privileges, to be selected; these pick lists do not offer the Quick Add function.



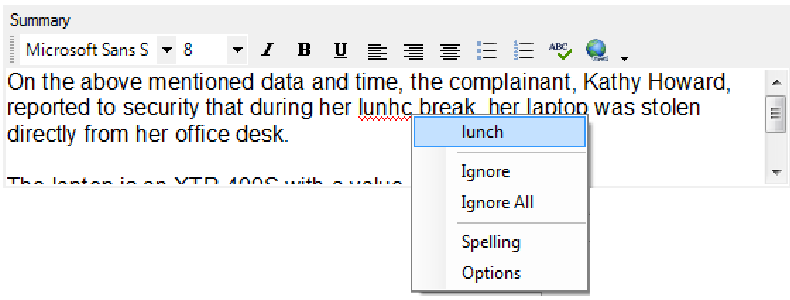
After populating a pick list field with a selected entity, you may click the **View Details** icon to the left of the field to quickly view the entity's record. The entity's record will open in read-only mode in a separate window. If you are not authorized to view the entity's record details, you will receive a message indicating this, and the record will not open.

At any time, you may click the **Remove** button located next to the Add button to clear the field of the current selection.

Multi-Line Text Areas

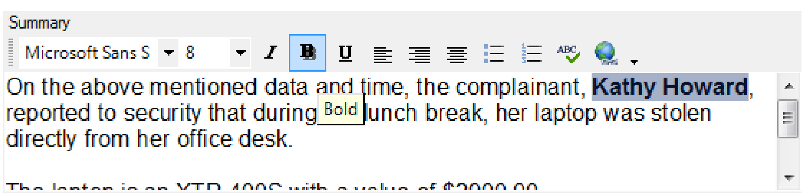
To enter a value in a text field, type inside the field. For additional options, including cut, copy, and paste, highlight the applicable text, right-click and select the desired option from the menu.

All multi-line text fields include a spell-check option. Perspective will underline misspelled text in red. Right-click the applicable text to access suggested spelling corrections. Or, click the **ABC** button on the formatting toolbar, and Perspective will run a spell-check on all words in your multi-line text area.



You can use the following tools to format all multi-line text areas in Perspective:

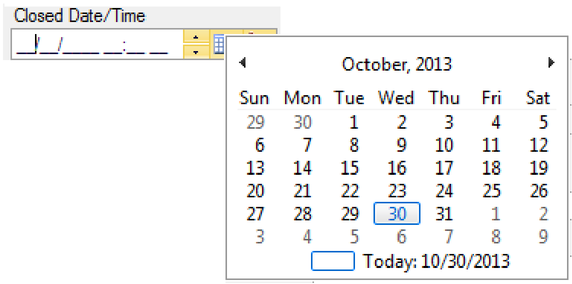
- Font face
- Font size
- Italics
- Bold
- Underline
- Text alignment (left, right, or center)
- Bullets
- Numbers
- Hyperlinks



*Note: By clicking the drop-down arrow on the right of the formatting toolbar, you can individually hide or show buttons (by hovering on **Buttonbar)**, or you can customize the appearance and functionality of your toolbar (by selecting **Customize…**).*

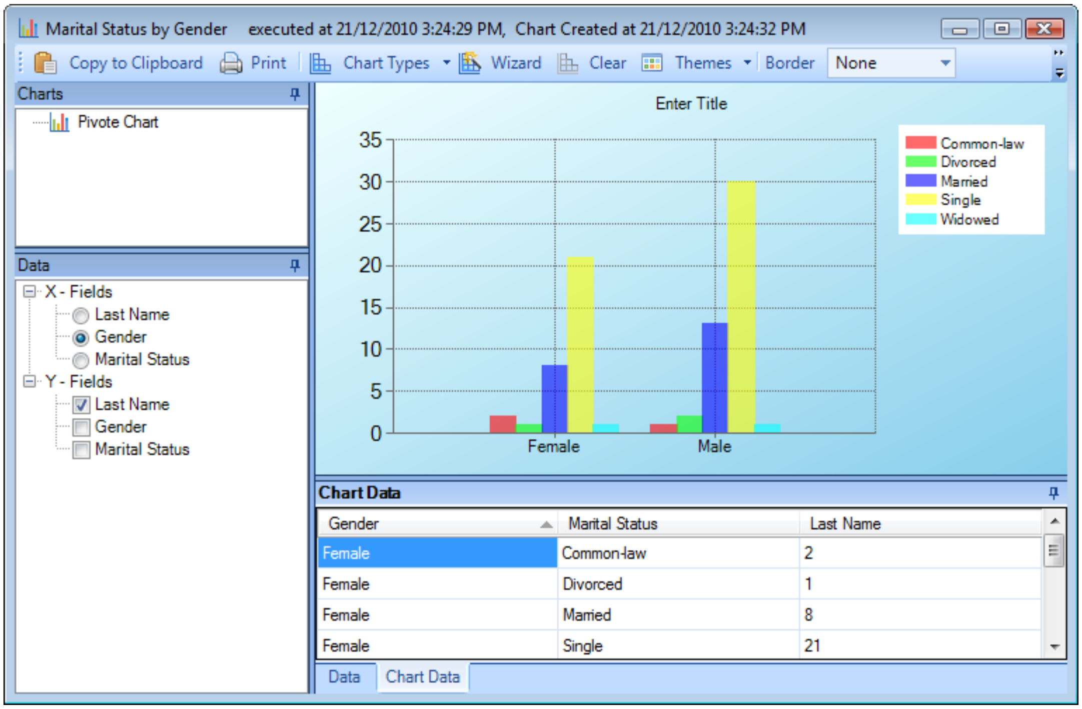
Calendar

To select a date and time using the calendar function, click the **calendar** button and navigate to the day, month, and year you want to select. Click on the date to populate the corresponding field with the date you have selected.



Appendix D: Chart Wizard

The Chart Wizard tool embedded in the Analysis Expert contains a number of options that allow you to fully customize your chart. To access the Chart Wizard, click **Wizard** on the chart toolbar, or right-click in the chart area and select Wizard.



Specify your chart options, selecting the appropriate modes from the toolbar on the left. Click **Previous** and **Next** to navigate between the modes.

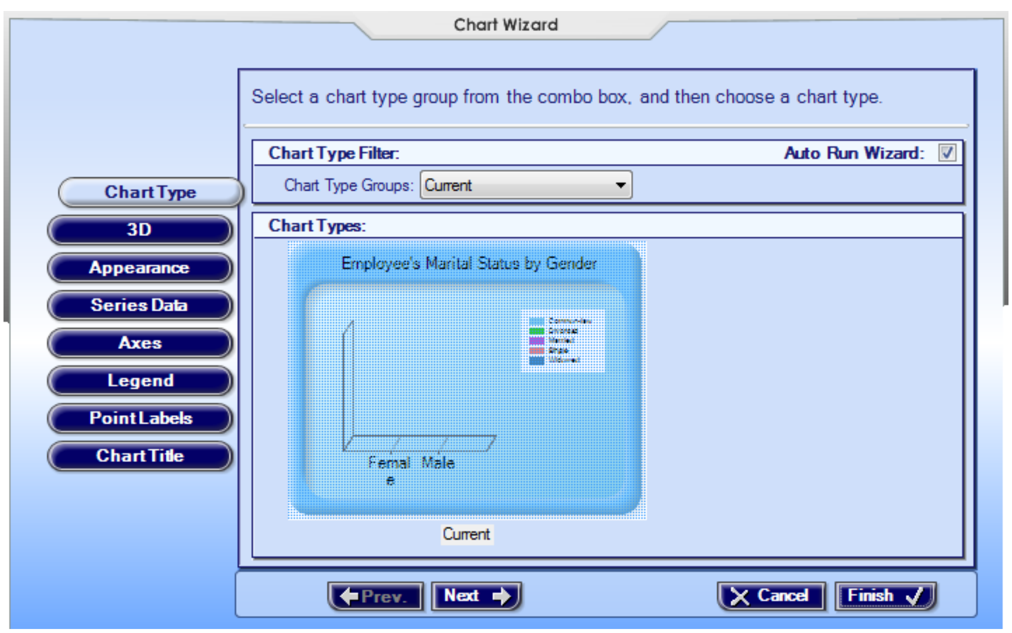
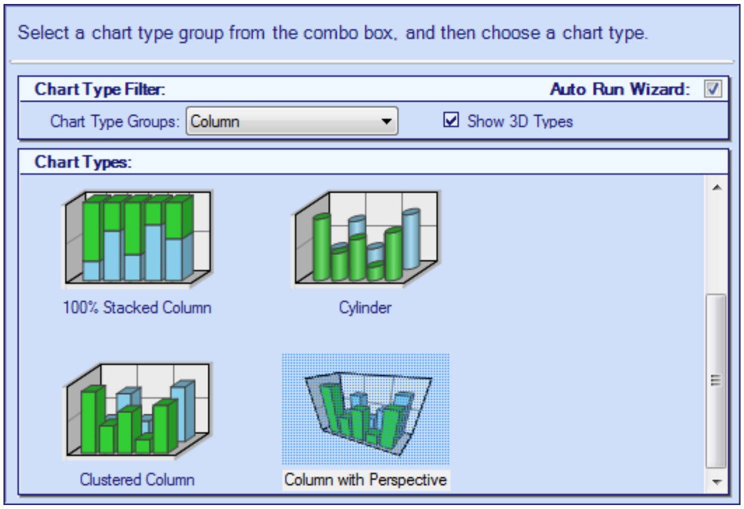


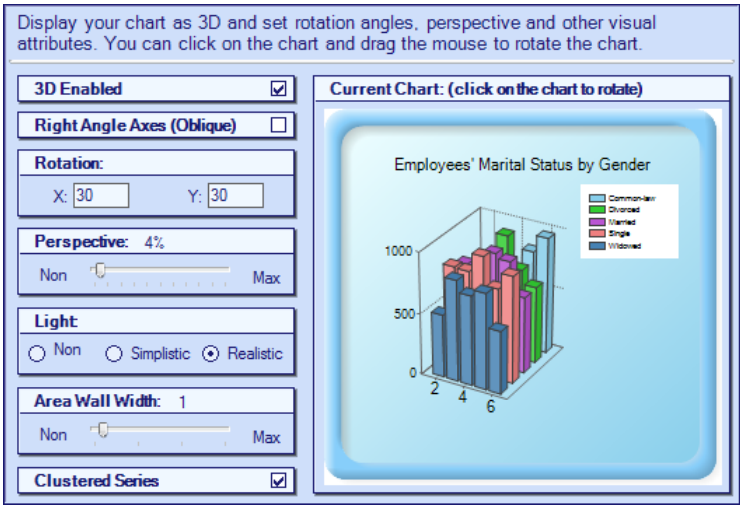
Chart Type

- Choose the general **Chart Type Group** (e.g., Column), and then select the specific **Chart Type** (e.g., Column with Perspective).
- Click the **Show 3D Types** box to see the chart type images in 3D.



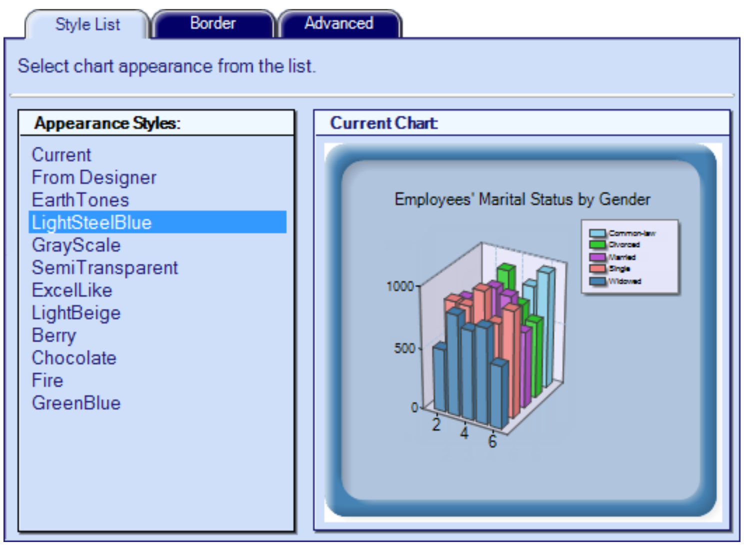
3D

- To start editing three-dimensional properties of your chart, ensure the **3D Enabled** box is checked.
- Check the **Right Angle Axes (Oblique)** box to make your X and Y axes perpendicular to each other. Uncheck the box to set them at an angle other than 90 degrees.
- Drag the chart or alter the numbers in the X and Y **Rotation** fields to change the viewpoint of the chart.
- Adjust the degree of **Perspective** that corresponds to the distance and spatial relationship of image in relation to you.
- Adjust the degree of the **Light** or shading applied to the chart.
- Adjust the width between marked values on the X and Y axes under **Area Wall Width**.
- If your chart includes a series variable, check the **Clustered Series** box if you want to cluster the variables separately.

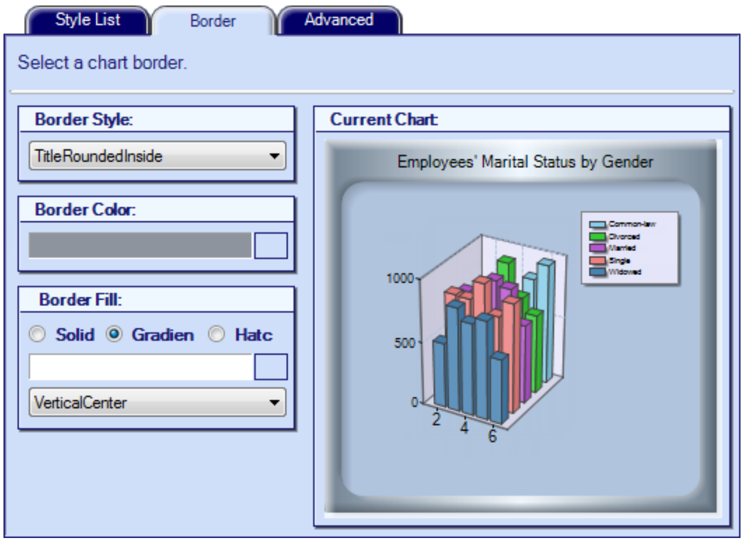


Appearance

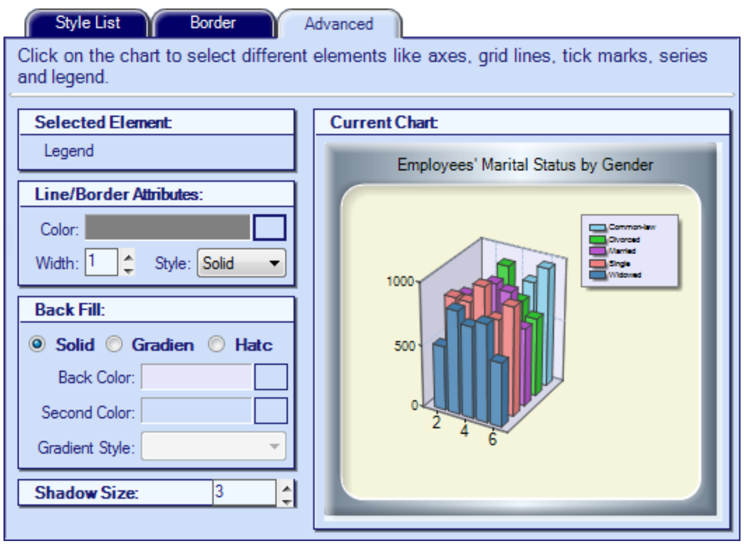
- Under the **Style List** tab, indicate what color scheme you want to apply to your chart.



- Under the **Border** tab, choose a **Border Style** and, if applicable, the **Border Color** and **Fill**.

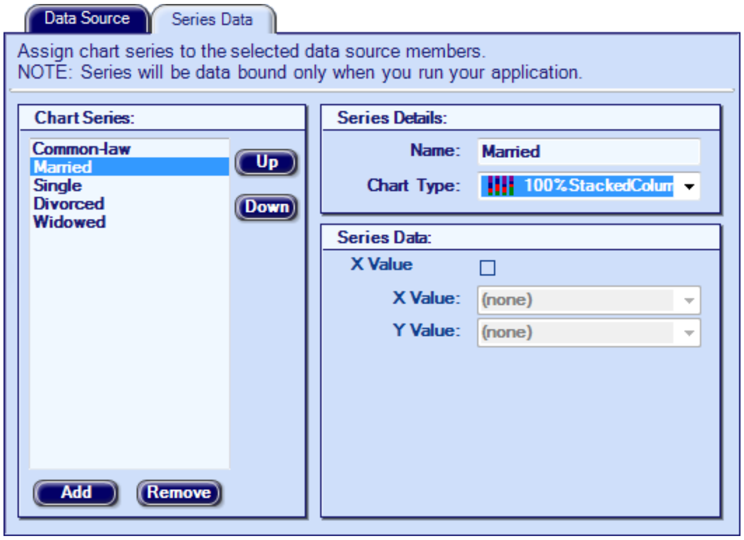


- Under the **Advanced** tab, select an element of the chart you would like to edit clicking on the chart image. In the **Line/Border Attributes** section, select the **Color**, **Width**, and **Style** of the line border of the element. In the **Back Fill** section, adjust the chart elements' background colors and color schemes (Solid, Gradient, or Hatch Background). In the **Shadow Size** section, set the depth of the shadow for the element.



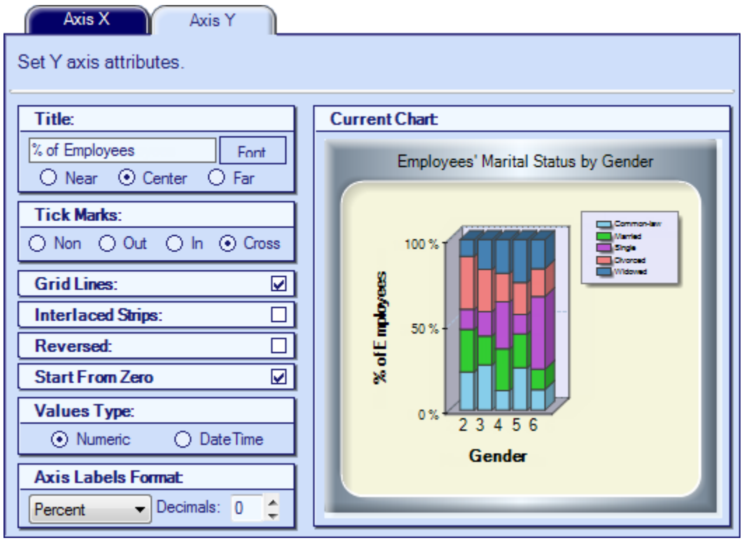
Series Data

- Under the **Series Data** tab, add, remove, move, rename, and select Chart Types for the series variables included in your chart.



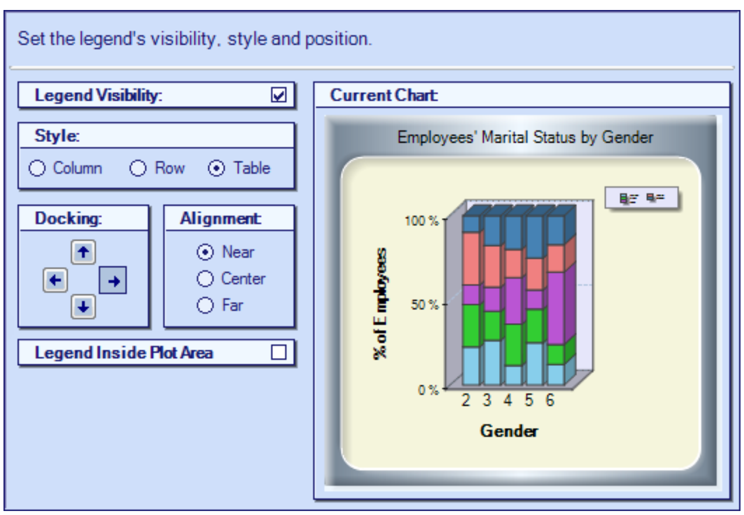
Axes

- Under the **Axis X** and **Axis Y** tabs, assign formatted axes **Titles**.
- Choose the placement of **Tick Marks** for axes values.
- Make **Grid Lines** visible or invisible.
- Apply **Interlacing Strips** of gray shading to every other grid column or row.
- Make the chart axes **reversed**.
- Maintain or eliminate any white space between the charted elements and the edges of the chart area with the **Side Margin** or **Start at Zero** option.
- Set the axes **Values Type** as Numeric or Date/Time.
- Select the correct **Axis Labels Formats** and the number of **Decimals** for these values.



Legend

- If your chart has a legend, ensure the **Legend Visibility** box is checked to display the legend.
- Choose the legend's presentation **Style**.
- Select the legend's position relative to the chart in **Docking** and **Alignment**. Check **Legend Inside Plot Area** to display the legend inside the chart area.



Point Labels

- Check **Display Point Labels** if you want to label charted values for columns, bars, and so forth. Under **Selected Chart**, choose to format series of labels for each variable separately or apply the same formatting to all charted point labels.
- Select the **Color** and **Font** of labels.

- Set the **Angle** and **Position** of the label text relative to the point charted.

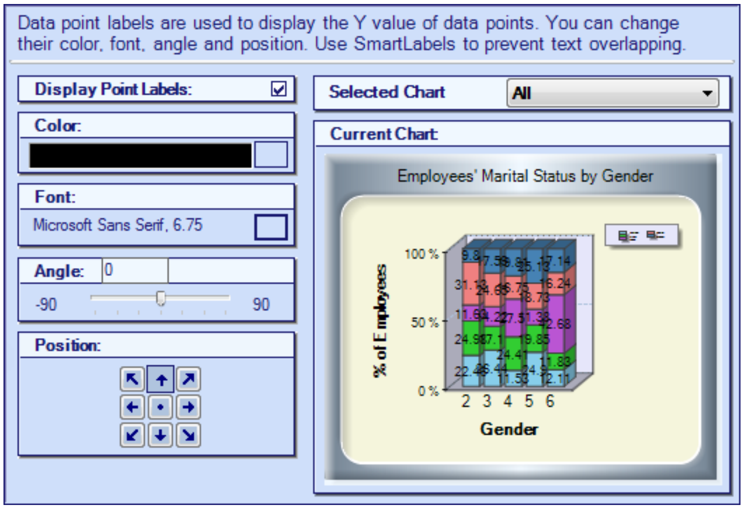
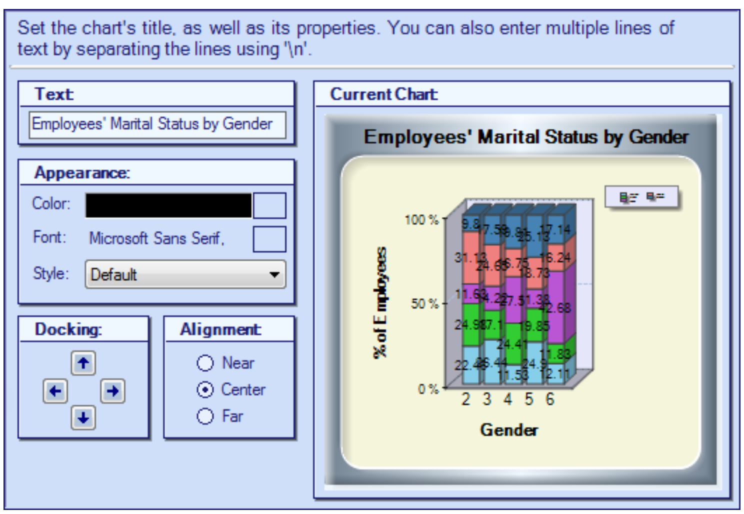


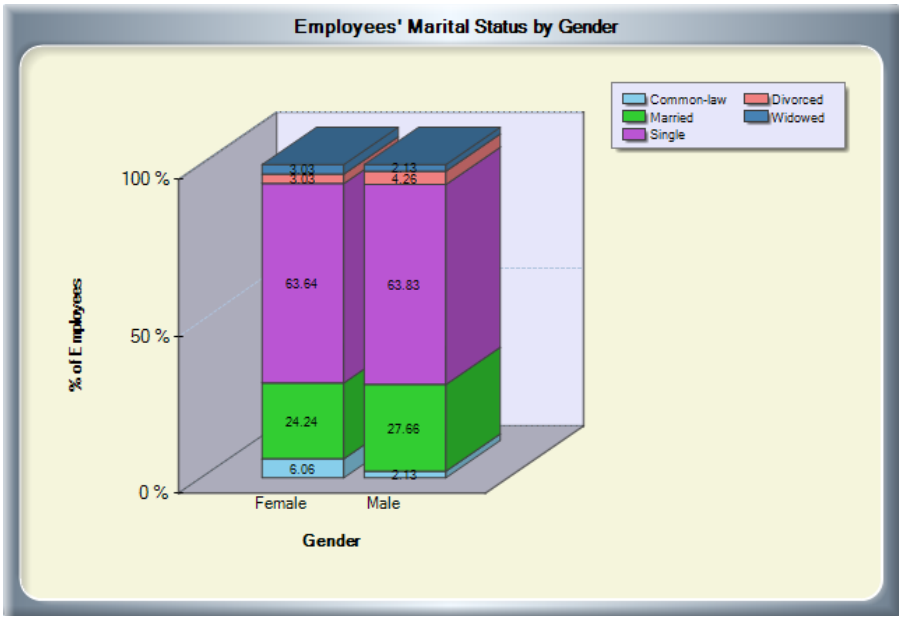
Chart Title

- Enter or edit the chart title's **Text**.
- Choose its **Color**, **Font**, and **Style**.
- Select the title's position relative to the chart with the **Docking** and **Alignment** options.



Finish

Once the design of your chart is complete, click **Finish** to exit the Wizard and see your chart results. Click **Cancel** to restore the chart to its original view.



Glossary

Activity
An activity is an event or series of events with which security personnel may become involved. In Perspective, activities are created, scheduled, and assigned to officers or organizations with the help of the Perspective DispatchLog module. When an activity has been closed, the corresponding Activity record is transferred to the Activities component within Data Forms, where it can be further described, investigated, and analyzed.

Administrator
An Administrator sets up Perspective, changes settings, and assigns security protocols to users. Administrators have the highest level of access to all records, forms, and fields; they have no visibility or access restrictions within the program.

Assignment
An assignment is a task that is given to a user by his or her supervisor. Only authorized users can create assignments.

Authentication
Authentication refers to a security measure requiring a user to enter proof of identity (e.g., a User Name and Password) before accessing a network, program, file, or other information.

Averted Loss
In Incident and Case records, a loss that is associated with an involved entity and that is avoided in the course of an incident as a result of a preventative action.

Banner
A banner is a long rectangular button that opens a new section of the program when clicked (e.g., the Data Forms banner, the Analysis Expert banner).

Call Category
A Call Category rollup describes an activity according to its type specifications: Level 1, Level 2, and Level 3. Call Category rollups are hierarchical, meaning that the option selected in the first level of the hierarchy, Level 1, determines what options are available in the second level of the hierarchy, Level 2, and so forth.

Call Code
A Call Code is a combination of alphanumeric symbols that are used in your organization to code the Call Category, optionally combined with the call's Priority and Site. In Perspective, entering a call code on the new Activity record form will populate the Call Category, Priority, and Site fields. Also, entering the three latter fields may automatically calculate the appropriate Call Code, given its availability in the system. The Call Code specifications can be set in the Administration component of Perspective.

Case	A case is a grouping of incidents related by person, item, location, class, or other commonality, generally requiring further investigation. (Case management is only available in the ICM and EIM Editions of Perspective.)
Chain of Custody	Chain of custody refers to the complete and thorough documentation of an evidence piece's seizure or collection, possession, control, transfer, and disposition. When the process is carried out correctly, documented chain of custody verifies that a piece of evidence is authentic, that the evidence is indeed connected to a particular incident, involved person, or organization, and that the evidence has not been tampered with, compromised, or misplaced at any point from its initial collection to its appearance in court.
Child Data	Child data refers to the data that are recorded on Perspective's subforms, or that could potentially correspond to more than one referent. Examples of child data include information about involved Persons, involved Vehicles, and so on.
Child Node	A child node is a node that can only be accessed when its associated parent node has been expanded.
Class Rollup	A Class Rollup describes an incident according to its Class, Category, Subcategory, and/or Type. Class Rollups are hierarchical, meaning that the option selected in the first level of the hierarchy, Class, determines what options are available in the second level of the hierarchy, Category, and so forth.
Client	A client computer is the computer used to access a software program or application. It is connected to a network of other computers and may request information from a remote computer, called a server, in order to run the application.
Component	A component is a program subdivision represented by a specific type of form. For example, the Data Forms *component* of Perspective contains such forms, or *components*, as Incidents, Cases, Activities, Items, etc. The components within Data Forms are graphically represented by *banners* accessible from the Navigation pane.
Dashboard	The Dashboard is like the Home page or main screen of Perspective. It displays charts summarizing incident information, as well as messages and assignments from supervisors.
Data	Data is information.

Data Entry	Data entry is the process of placing information, or data, in a database. This is usually accomplished by typing data into fields in data forms.
Database	A database is a collection of data stored in a structured format. A database might be compared to an electronic filing cabinet. Databases are often organized into tables that store related information in the form of records (e.g., Incident records, Person records, Item records).
Database Management System (DBS)	A program that allows you to manage information in databases.
Desktop	Generally, when a computer is turned on, the screen opens on the desktop. This is the area where icon shortcuts are found, including My Computer and the Recycle Bin. All types of files can be saved onto the desktop.
Dialog Box	A dialog box is a window that appears on screen when a particular selection is made. It generally provides further options for the selected program feature.
DispatchLog	DispatchLog is an integrated module of Perspective that enables Security Departments to quickly and easily dispatch personnel and agencies, and to create work orders associated with dispatching activities. As calls come in, you may use DispatchLog to easily track the location, category, and priority of the activities, and to keep up-to-the-minute records on your officers' activities, including which officers are available for response, when they arrive on scene, and when they return. Once an activity has been closed in DispatchLog, it is transferred to the Activities component of Data Forms, where it can be further described and investigated. The banner that opens DispatchLog is located on the Navigation pane.
Drop-Down	A drop-down list, or menu, offers a range of selections that have been condensed to save screen space. Click on the down arrow on the right side of a drop-down field, and the field will expand to display a list of options. Select an option by clicking it.
e-Incident	An e-Incident is an electronic Incident report. It may be created in one of Perspective's optional modules (e.g., Perspective e-Reporting or Perspective Portal), or it may be imported via Perspective's Import Manager tool.

e-Report	An e-Report is an electronic Incident report submitted from Portal by an employee to inform an employer of an incident or suspicious activity. Once an e-Report reaches the Gateway, it is assessed to determine whether or not it should be accepted as a valid Incident record.
Electronic Report	An electronic report is an Incident, Item, Person, Organization, or Vehicle report submitted electronically to the Gateway. Electronic reports may arrive from a number of sources. Incident reports may be submitted from Portal. Incident reports, as well as Item, Person, Organization, or Vehicle reports, may be imported using Perspective’s Gateway access point. Once an electronic report reaches the Gateway, it is assessed to determine whether or not it should be accepted as a valid Incident, Item, Person, Organization, or Vehicle record.
Entity	An entity is an object, person, event, or other concept that provides information about a larger category recorded in Perspective. For example, in order to create a detailed Incident record, you may need to enter involved persons and items, attachments, assignments, losses, or pieces of evidence that help to create a full picture of the larger category—the incident.
Entity Record	An entity record is a collection of data related to a particular entity (e.g., the record of an Involved Person, Assignment, Loss). In Perspective, entity records are stored as rows in a table that can be expanded into editable, or viewable, subforms.
Export	To export a file is to convert a file created in one software program or application into a format that is usable in another application. For example, exporting a set of query results to Microsoft® Excel® involves converting the results into a format suitable for use in Excel.
Exposure	In Incident and Case records, the amount of potential monetary loss associated with an involved entity.
Field	A field is an element within a form that allows you to enter or access a specific nugget of information related to the record type. One field in an address record might be “Street”.
Filter	When filters are applied in directory searches, they tell the program to return only records in which the content of a specific field matches the criteria set by the user.

Focal Point	Perspective Focal Point is an optional module of Perspective, offering instant access to incident, investigation, and case data, summarized in a series of dynamic charts and graphs. Users can analyze their data to see the big picture, or drill down to review specific details, getting the facts they need, while uncovering areas of concern and sudden trends.
Form	A form is a part of the user interface that allows you to interact with the information contained in the database via a screen populated with related fields and designed to perform specific program functions, like reporting an incident, conducting searches, preparing reports, and so forth.
Gateway	The Gateway serves as an inbox for all electronic reports generated using Perspective's Portal. Once an electronic report lands in the Gateway, the Gateway Administrator and/or Gateway Approver are responsible for assessing it and determining whether or not the report should be accepted into Perspective as a valid Incident, Item, Person, Organization, or Vehicle record.
Gateway Administrator	The Gateway Administrator initially reviews all new electronic Incident reports (e-Incidents) submitted to the Gateway. The Gateway Administrator can edit e-Incidents, including customizing their security controls, and can either assign them to a Gateway Approver for follow-up or delete them from the system. For all other imported reports (Item, Person, Organization, or Vehicle), the Gateway Administrator may make them available within Perspective for authorized users to add to the main database, or delete them from the system.
Gateway Approver	The Gateway Approver is responsible for following up on all e-Incidents he or she has been assigned by the Gateway Administrator. The Gateway Approver can edit e-Incidents, and can either accept them into Perspective as valid Incident records, or send them back to the Gateway Administrator for reassignment. If an e-Incident contains insufficient information to accept or reject it, the Approver can store the e-Incident in a Pending folder for review at a later date. For all other imported reports (Item, Person, Organization, or Vehicle), like the Gateway Administrator, the Gateway Approver may make them available within Perspective for authorized users to add to the main database or delete them from the system.
Grid	Search results and query results display in the form of a grid, or list, with each entity occupying a row.

Hierarchy	A hierarchy is organized into successive levels, or layers, with each level subject to the preceding levels in the hierarchy. For example, the Class Rollup is divided into four fields ordered hierarchically (Class, Category, Subcategory, and Type); a selection made in the Class field determines what options are available in the Category field, and so forth.
Hyperlink	A hyperlink refers to an image or a string of text that retrieves a file, Web page, or other related information when clicked.
Icon	An icon is a small graphic used to represent a particular file, program, or function. Clicking the icon will open the file or program, or perform the appropriate function.
Import	To import a file is to bring a file into the currently active application. For example, importing an electronic report into the Gateway involves converting the file into a format that is usable within Perspective, and then uploading the properly formatted file into the Gateway.
Incident	An incident is an unusual action or situation affecting persons or property, either accidental or purposeful, which requires notice or follow-up by a security or human resources department.
Integration Services	Perspective Integration Services is a Web Service Application Programming Interface (API) that is designed as a tool for communicating with Perspective data across multiple external interfaces or systems. Integration Services enables secure creation, reading, updating, deleting, and querying of Perspective data across the supported systems.
Interface	Interface in Perspective refers to the visual on-screen means (e.g., windows, dialog boxes, buttons, banners, panes, or icons) by which Perspective modules and components communicate with the user to allow for a seamless entry, display, analysis, and transfer of data.
Investigation	An investigation is a follow-up or close examination of an incident (or of a case linked to one or more incidents) in order to gather facts and learn more about the incident's causes, sequence of events, involvements, and so forth. (Investigation management and case management are only available in the ICM and EIM Editions of Perspective.)

Investigator	An investigator is a person assigned to work on the investigation of an incident (or of a case linked to one or more incidents). Within Perspective, users designated as investigators are permitted access to investigation forms, tabs and functions. (Investigation management and case management are only available in the ICM and EIM Editions of Perspective.)
Label Set	See “Language”.
Language	In Perspective, a language refers to a set of field labels. Custom languages with unique field labels can be created and assigned to particular users. The default language, or label set, in Perspective is System English.
Link	A link is a connection to a specific file, form, or program level.
Link Chart	A link chart, in Perspective Visual Analysis, visually represents the involvements and associations between related Incident, Case, Item, Person, Organization, and Vehicle records. Icons signify the record entities, and colored lines identify the nature of their relationships.
Listing Pane	The Listing pane is the area of Perspective where users view lists of records available for selection; the record entity displayed depends on the selection made in the Navigation pane. The Listing pane is located in the middle of the screen, between the Navigation pane and the Viewing pane.
Logic Formula	A logic formula expresses the reasoning Perspective will use when applying search criteria. It uses letter symbols to represent each set of search criteria and applies AND/OR operators and parentheses to define the relationship of search criteria to each other. For example, the simple logic formula (A AND B) shows that Perspective will only search for results that meet both criteria A and B; in order to include results that meet criterion A or criterion B, the logic formula would need to be modified.
Lookup List	See “Drop-Down”.
Narrative	A narrative is the story or explanation of an event.
Navigate	To navigate a program refers to using navigational tools, such as menus, buttons, tabs, and links to move between windows and other structural elements of the program.

Navigation Pane The Navigation pane is the area of Perspective where users navigate to major program components (e.g., the Dashboard, Data Forms, Analysis Expert), and, to some extent, within the program components. The Navigation pane is located on the left side of the screen.

Net Loss In Incident and Case records, the value determined by subtracting the Total Recovered amount (if any) from the Total Loss amount.

No Impact Loss In Incident and Case records, any loss that has been associated with an incident that has either been prevented, or remains a potential loss and, hence, does not impact the Net Loss amount.

Node A node is a point of intersection in a tree that allows users to navigate through the tree to access increasingly specific levels of data or program function. A node can be identified by the small square box to the left of its position in the tree. Clicking the box when it has a plus (+) sign inside will expand the entity and display all its sub-entities underneath. Clicking the box when it has a minus (-) sign inside will collapse all the sub-entities and hide them under the main entity. When a sub-entity also has a small square box to its left, it is known as a child node.

Officer An officer is a security personnel representative who can be dispatched and responds to activities created in Perspective DispatchLog.

Officer Alert In Perspective DispatchLog, an Officer alert determines the amount of time set for a dispatched officer to respond to an activity when the officer reaches a specific Status (e.g., On Route, On Scene), Location, and/or when the activity’s Priority matches a specific priority set in the Officer alert. The combination of settings that triggers a specific Officer alert can be set in the Administration component of Perspective. Once activated in DispatchLog, the settings defined for the alert will cause the Officer alert timer to start counting the time for the officer to respond to the current combination of conditions before their status must be modified.

Operator

An operator is used to create a more refined search. Like the calculation symbols used in mathematical formulae, where operators define the relationship between the formula's parts (e.g., A is equal to B), operators in Perspective express the relationship of the field to the value when setting search criteria. For example, if the Class field is selected and Criminal is the chosen value, an operator of "equal to" would stipulate that any records appearing in your search results would have a Class equal to Criminal. Examples of other operators include not equal to, less than, starts with, and like.

Organization

In the context of Perspective, an organization is any agency, company, or group.

Organizational Rollup

An organizational rollup indicates the company division or region that a user belongs to, or when assigned to a record, the particular division or region that is permitted to access the record. A user can only view records with the same, or lower, organizational rollup as his or her own. Organizational rollups are multi-tier or hierarchical; the option selected in the first tier determines what options are available in the second tier, and so forth. Moving down the hierarchy, organizational rollups become increasingly specific. A user with an organizational rollup higher on the hierarchy will have greater access to records than a user with a more specific organizational rollup lower on the hierarchy.

Pane

A pane is an area within an on-screen window that contains specific type of information in the form of interconnected files, fields, messages, banners, buttons, formulae, or other information. For example, Data Forms interface is expressed through the functionalities contained in the Navigation, Listing, and Viewing panes.

Parent Data

Parent data refers to the basic data that are recorded on Perspective's main forms, or that correspond to only one referent. Examples of parent data include, but are not limited to, an incident's Class, Site, Business Unit, Reported Date/Time, Status, and Created by User.

Pick List A pick list requires users to select an incident, item, person, organization, or vehicle from a range of records displayed in a separate window. (In the ICM and EIM Editions, case pick lists are also available.) If the desired entity does not appear in the pick list, some pick lists allow users to create a new entity record for selection. A pick list effectively links data entered in a field to an entity record. Click on the green Add icon on the right side of a pick list field to display a window containing a list of records for selection. Once a record is selected, the window will close and the pick list field will automatically populate with the record's name.

Pop-Up A pop-up is a window that opens automatically when a particular option is selected in the previous window.

Portal Perspective Portal is a module for Perspective, enabling any employee, onsite or in a distant location, to report an incident or suspicious activity as soon as it occurs, through the Portal webpage set up specifically for their workgroup. Once an electronic report has been submitted from Portal, it lands in the Perspective Gateway, where it is assessed to determine whether or not it should be accepted as a valid Incident record.

Priority The level of importance assigned to an incident, activity, or email message (e.g., High, Low, or Normal). The list of available priority levels can be set in the Administration component of Perspective.

Query A query is a request for information. In Analysis Expert, when the Execute button is clicked, the program sends a message to the database where all information is stored, requesting results matching the query's specified criteria.

Quick Find The Quick Find tool allows users to easily locate records containing a particular text string. Quick Find searches text fields across the Perspective database (such as summaries, narratives, and text attachments) for the word or phrase specified, and returns a comprehensive list of records for review.

Radio Button A radio button allows users to select one option out of a set of options. Before a radio button has been selected, it will look like an open circle, and after it is selected, a dot will appear inside the circle. Once a user has selected one radio button, selecting any other radio button in the same set will deselect the first option.

Record	A record is a subsection of database, holding information about one entity or a member of a category within the database that is stored as one unit (e.g., an Incident, Activity, Item, or Person record).
Record View	A record view is a particular list of records that a user is permitted to access. In Perspective, users are able to create and save their own customized record views in the Data Forms component, allowing them to better organize and manage the records they need to view on an ongoing basis.
Recovery	In Incident and Case records, an entity that corresponds to a loss amount associated with an incident that has been restored or regained, as a result of an action that had been implemented after the incident took place.
Regulated Time to Act (RTA) Alert	In Perspective DispatchLog, a Regulated Time to Act alert determines the amount of time set for a dispatcher to react to and modify an activity when the dispatched officer reaches a specific Status (e.g., On Route, On Scene), Location, and/or when the activity's Priority matches a specific priority set in the Regulated Time to Act alert. The combination of settings that triggers a specific RTA alert can be set in the Administration component of Perspective. Once activated in DispatchLog, the settings defined for the alert will cause the RTA timer to start counting the time the dispatcher is left to check, and modify, the status of the dispatched officer in Perspective DispatchLog.
Ribbon	The Ribbon locates the most frequently used general administration, navigation, help, and search tools for you to refer to sections of the integrated Help files. In the Data Forms component, the Visual Analysis icon is added, which assists in visual representation of relationships between the records stored in the Perspective's database. In the Analysis Expert component, the Ribbon is populated with an additional set of icons that perform saving, adding, cloning, deletion, sharing, and execution of queries.
Role	Every user is assigned to a role, which determines how much access the user has to Perspective's functions and features, and what he or she uses the program for. Examples of roles include Administrator, Investigator, or General User. (The Investigator role is only available in the ICM and EIM Editions of Perspective.)

Rollup A rollup is also known as a multi-tier or hierarchical lookup list. Rollups are used to streamline the options and functions available to users when making selections from related lookup lists. Each rollup has up to four tiers. The first tier is known as the Root; the option selected in this first tier determines what options are available in the second tier, and so forth. A higher tier in the hierarchy is known as a Parent field and a lower tier is known as a Child field. Any Child fields that are on the same tier of the hierarchy are called Sibling fields.

Screen A screen is a display of some portion of the program on your computer monitor. The term *screen* may be used to refer to the main program screen, a program form, or a subform (e.g., the Data Forms main screen, an Involved Item screen, the Analysis Expert screen).

Search To search a database refers to the process by which the software program looks for data meeting the criteria specified by the user.

Search Engine A search engine is a computer program that retrieves files or data from a database based on specified search criteria.

Server A server is a computer that shares information with client computers in a network to help process a software program or application. The term server may refer to either the machine that shares the information, or to a particular software program designed for this purpose.

Sigma (Σ) Sigma is the Greek symbol for "sum". In Analysis Expert, the sigma symbol appears on the heading of a column when Group By is clicked, indicating that the data in the column can be added together.

Standard Operating Procedures (SOP) A part of Perspective's interface that provides guidance on the course of actions in case of an activity with a specific Call Category, Location, and/or Status. The Standard Operating Procedures can be described in the Administration component of Perspective with the help of a brief description, a standardized checklist of actions to be performed under the specified activity conditions, additional attachments, hyperlinks, and automated notifications. The created SOP rule will subsequently feature in Activity records that correspond to the settings specified in both Perspective's Activity data forms and the SOP component in Perspective DispatchLog.

Status Bar	The Status bar is a part of Perspective's interface that displays your system and login information, including your username, role name, as well as Perspective's system and connection statuses (e.g., Connected/ Disconnected). The Status bar is located at the bottom of the screen.
Sub-Administrator	A Sub-Administrator is permitted to create user accounts and modify User Details and User Defaults, but only for users who are within their default workgroup and who have the same (or lower) access level and organizational rollup as their own.
Subform	A subform is a sub-tabbed screen that contains child data, allowing you to enter a large amount of detailed information about an entity in an organized and coherent manner. A subform can only be accessed through its associated parent form. Like its parent form, the subform is designed to perform specific program functions (e.g., recording an involved person, registering a piece of evidence).
Sub-tab	A sub-tab is a tab that can only be accessed through a parent tab when navigating a form. For example, in the Incident form, the Involvements tab has four sub-tabs: Persons, Organizations, Vehicles, and Items.
Supervisor	A supervisor is permitted to access the Controls tab on all records. Among other things, this allows the supervisor to change the workgroups, organizational rollups, and access levels of records at will.
Tab	A tab in Perspective is used to mark a particular section within a data form. It looks like and operates like a tab in a file folder. To access the contents of a tab, users must simply click on the tab.
Table	A structure within a database designed for storing related information, often in the form of records or entity records. Simple databases may contain only one table; complex databases contain many.
Toolbar	A row of icons that activate functions or options when clicked. (e.g., The Ribbon).
Total Loss	In Incident and Case records, the sum value of all Loss amounts associated with an incident that corresponds to losses that actually took place.

Tree	A tree is a hierarchical structure representing the links and relationships between program components. For example, expanding a single node reveals child nodes, which in turn yield further entities, until the user arrives at individual fields containing precise pieces of data. The hierarchical relationship between all these pieces, essentially a navigation map of one particular area of the program, can be described as a tree.
User	A user is a person who uses Perspective, and has his or her own User Name and Password to access the program.
User Defined Field (UDF)	A UDF is a special field developed by an organization to meet their specific needs.
Value	A value is the specific information, or data, entered into a field.
Vehicle Identification Number (VIN)	VIN is a unique tracking number that serves to identify a vehicle.
Viewing Pane	The Viewing pane is the area of Perspective where users view record contents. (Depending on their user privileges, users may also be authorized to edit, delete, or add records in the Viewing pane.) The record displayed in the Viewing pane depends on selections made in the Navigation pane and the Listing pane. The Viewing pane is located on the right side of the screen.
Visual Analysis	Perspective Visual Analysis allows data relationships between Incident, Case, Item, Person, Organization, or Vehicle records to be rendered into powerful visual link charts. These visual elements can easily be analyzed and interpreted, bringing clarity to complex investigations and scenarios.
Window	A window is an enclosed rectangular on-screen viewing area that displays programs, files, fields, messages, or Web sites independently of other on-screen areas.
Workgroup	A workgroup, in Perspective, segregates users by department, division, corporate level, region, or any other criteria an organization wishes to use, and allows an organization to limit users' access to data. Users can only access records assigned to their respective workgroups.

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