

USER'S GUIDE

Perspective by PPM[™]

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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

 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.

Perspective	
Perspective Version 4.0	
Launch Perspective	
.Net Framework 4.0 needs to be installed to launcr	this application.
If you do not have the .NET Framework: Click here to download .NET Framework 4.0 from N	licrosoft

- 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.



(12%) Downloading Perspective by PPM 2000 Inc.	
Downloading Perspective by PPM 2000 Inc. This may take several minutes. You can use your computer to do other tasks during the installation.	
Name: Perspective by PPM 2000 Inc.	
From: qa2012s0a	
Downloading: 10.1 MB of 79.1 MB	
	Cancel

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, 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 the \Rightarrow icon to the right of the URL field.
- 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.

Contraction of the format
Authentication Mode: Perspective Please provide logon info.

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 \triangle 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.
- 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").

▲	Perspective EIM	
Main		© Privacy Legal
File Toggle Logoff Setting	Res Quick Custom Hep Rind Search Rind	
⊕·	Form(s) Field(s)	Selection(s) 🛛 🖂 🕸
Photo Curres P	3	Samay Samay
	Criteria Properties Audit	N A 8
Dashboard	Criteria Designer	Overster Value
	agreen toolin (180	
Data Forms		
Reports		
Analysis Expert		
Gateway		
Administration	4	Saste & Converted

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.

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 <i>Perspective DispatchLog</i> 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.

Main System Components

Reports	Choose from a number of pre-set reports to generate statistics and analyze trends in your data.
Analysis Expert	Use Analysis Expert to query records for specific data, and then turn your results into a printed grid, spreadsheet, chart, or report.
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 <i>Perspective Administrator's Guide</i> .

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 \Im 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 in 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.

Change Password	×			
"Please enter your old and new passwords, and re-enter the new password to confirm."				
Old Password				
New Password				
Re-enter New Password	••••••			
	OK Cancel			

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.
- 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.

Settings	8
General Email Shortcut Keys	
 Automatically Refresh Dashboard Assignments Refresh Every minutes. 	
Enable Grid Accessibility	
Changes require application restart. Reset Save Cancel	

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 $\stackrel{>}{>}$ on the Ribbon. The Settings window will open.

Settings	[
General Email	Shortcut Keys
Do not us	se mail options.
Outlook	1 Notification works on 32-bit Outlook only.
 ◎ SMTP 	
Host	mail.example.com
Port	123456
Usemame	psv
Password	
	Use Default Credentials 🛛 Use Anonymous Access
	Enable SSL
Changes require a	pplication restart. Reset Save Cancel

- 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 $\stackrel{>}{>}$ 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.

Global	
Giobal	
Navigation Mode	Ctrl + N
Ribbon Menus *	Alt / F10
Navigation Keys	
Go to Data Forms	D
Go to Reports	R
Go to DispatchLog	L
Go to Dashboard	Н
Go to Analysis Expert	E
Go to Gateway	G

The default settings for shortcut keys are as follows:

Shortcut Keys

Function Name	Default Key Combination
Global	·
Navigation Mode	Ctrl + N
Navigation Keys	
Go to Data Forms	D
Go to Reports	R

L
Н
E
G
М
А
1
С
S
Ρ
0
V
w
Q
К
F
Y
1
2
8
9
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
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 + 0
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
Ribbon Menus *	Alt/F10

* 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 **(2)** 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 1 to fill the Viewing pane with information on the selected subject.

🚺 Contents 🗐 Index 😰 Search				- Search -	60
×	Select	ger	neral role rights		*
Welcome to Perspective by PPM 2000 Get Started Navigation Options Security Layer Overview System Administration Components General Settings Workgroups System Pullenes	All Role se 1. Select chect overri	ttings t the R kboxes dden a	are located under the Roles ole Rights tab. The screen 1 s. By default, all Allow Overrid t the User level.	tab of the Administration section in the Administration component. will contain a list of general rights with two columns of Enable and Allow O de boxes will be checked allowing the corresponding role right or set of right	verride stobe ≡
0 Roles	Save W Ad	d PEdit	🔄 Delete 😧 Cancel		
Add a new role	General Role	Defaults	Role Rights Privileges Reports	22	
 Establish default security controls, lang Select general role rights 	2	×	View Audit History		
Specify visibility and access privileges	Enable	Allow	Override		
View discrepancies between role right:			GeoRollup City Edit		
Set report visibility for a role			Metric measurement unit		
View discrepancies between role and			Gateway Administrator		
Users			Gateway Approver		
			Edt Exchange Rates		
Auditing	2	2	Editing All Narratives/Summaries		
			Locking Records	E	
Fage			Unlocking Records		
Standard Operating Procedures			Sealing		
Visual Alerts			Visual Analysis Access		
Gateway Administration		1	Quick Find Access		
Administrative Reports			Focal Point Access		
Service Manager			Allow Merge Entities		
Additional Information					
-			Allow Dispatchlog Access		
	Allow elevate	on new re	cords for:	+	
< •	2. Check	Enab	le to apply the correspondin corresponding right or set of	g right or set of rights to the role's users, and uncheck the Allow Override rights from being overridden at the User level.	box to

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.

🕕 Contents 📃 Index 🖾 Search	- Search	
x	Establish default security controls, language and currency for a user	*
Type in the keyword to find:		
user rights	All Users settings are located under the Users tab of the Administration section in the Administration component.	
About Access for Roles Access for Users Access For Users Access For CalPoint Accessing Custom Search Accessing Custom Search Accessing Quick Find Accessing Visual Analysis Activity Prefixing Add Officer Alent Adding Assigning to Roles Assigning to Users Audit Logs Case Prefixing Currency Define Visual Representation of Certail Discrepancies from Role Report Visibil Discrepancies from Role Rights Discrepancies from Solet Rights Importing Options Incident Prefixing Language Lookup List Visibility	 Note that any default settings specified for the user's role will automatically be assigned to the user. Verify that these se appropriate for the user and, if necessary, complete the following steps to modify them. Open the General tab, the User Defaults sub-tab. Select the workgroups you would like the user to have access to from the Workgroups list. From the Default Workgroup lookup list, select the workgroup the user will be working in most often. When the use new record, it will be stored in the user's designated Default Workgroup, unless they assign it to one of their other Assign an organizational rollup to the user in the Org Rollups section. Organizational rollups are hierarchical, so th select in the Org Level 1 field will determine what options are available in the Org Level 2 field and so on. As you m hierarchy, organizational rollups become more specific, naming groups within your organization that are increasing by company division or region. The user will only have access to records with organizational rollups is North America/Canada/Alberta and the user'. For example, if a record's organizational rollup is North America/Canada, the user will have access to own. Assign an Default Language to the user. This determines the field labels that will appear on forms when the user is a state of the set of the user is a state of the set of the set of the set of the user is the field labels that will appear on forms when the user is a state of the set of the user is a state of the set of the set of the set of the user is a state of the set of the user is a state of the set of	ttings are er creates a workgroups. e option you ove down the y specialized d to, or are o the record. rel as their clogged on.
Report Cover Page Security Controls Setting Report Visibility	Section Default currency for the user. An currency values entered in respective win now appear to the user in the Section Default currency for the user. An currency values entered in respective win now appear to the user in the	s currency.
User User Visibility	9. To allow the user to assign an access level, organizational rollup and/or workgroup to a new record that is higher or their own, check the Allow elevate on new records for Access Level, Org Rollups and/or Workgroup checkboxes	different from For +

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 <a>

 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 both 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 open in the foreground; in this case, minimize the Quick Find window to view Perspective.)

Quick	Find				D
		Enter Search Stri	ng		
		"and"	Search		
	Hits	Record 5	Details	Туре	F
2	5	JLI-2013-03-00028	Occurred From Date/Time: 3/18/2013 3:16:10 PM	Incident Narratives	1
1	1	IRC1-2013-03-00038	Occurred From Date/Time: 3/19/2013 9:53:47 AM	Incident Narratives	1
1	1	IRC1-2013-03-00110	Occurred From Date/Time: 3/28/2013	Incident Narratives	٦
1	5	GK-2013-03-00103	Occurred From Date/Time: 3/27/2013 9:02:20 AM	Item Involvement	٦
1	4	GK-2013-03-00056	Occurred From Date/Time: 1/1/2008 9:12:44 AM	Vehicle Involvement	
1	4	GK-2013-03-00059	Occurred From Date/Time: 1/1/2008 9:12:44 AM	Vehicle Involvement	
1	4	GK-2013-03-00059	Occurred From Date/Time: 1/1/2008 9:12:44 AM	Organization Involvement	٦
and appeared 5 time(s) within 3 area(s) of text. Text Area 1					
narea otests. xt Are	The UN sa	adent rebei groups are ngnting a c iys more than 70,000 people have	will war against Assad s forces across the country and in e been killed since the first protests in March, 2011.	any activists no longer bother to stage unarmed	
More recently, Asaad's group has been superseded by the Office of the Chiefs of Staff, which is associated with the opposition Syrian National Coalition and					

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.

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 is 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.

Chart Options	-		X
Chart 1	Select Chart Perspective Gauge Class ID Site	Ũ	•
Chart 2	Select Chart Incidents By Site From Last 365 Days Chart Type	Тор 10 т	•
Chart 3	Select Chart Incidents By Site From Last 365 Days Chart Type	Top 10 V	•
Chart 4	Select Chart Incidents By Organizatio From Last 365 Days Chart Type	nal Rollup Top 10 👻	•
		ОК	Cancel

- 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 ⁽⁶⁾.
 - This will open the options window for the chart that you chose to modify.
- 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 a.
- 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.

Assignments								
View All 🐺 Export 🗑 Go To - PPMI-2009-000260 😂 Reset Layout Clear Filter								
	Completed?	Number	Assigned Date	Assigned By	Assigned To	Due Date	Assignment Type	Message / Task
	V	CCWI-2011-02-00057	24/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity	
	1	CCWI-2011-02-00057	24/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity	
	\checkmark	CCWI-2011-02-00057	22/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity	
•		Mark Completed	/2010	St. Jean, Clint	180, Deb F		Follow-up Activity	
	V	Mark Completed	/2010	St. Jean, Clint	180, Deb F		Follow-up Activity	
		Go to Record	v2010	Jabbar, Abdul	St. Jean, Clint		Follow-up Activity	
		INC.D000000172	UZ/U8/2007	Kemper, Dale	St. Jean, Clint	30/11/2007	Follow-up Activity	Attend court for the

• **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 S.
- 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.

As	Assignments								
Vie	View All 🐺 Export 🛛 😨 Go To 😨 Reset Layout Clear Filter								
		*		-					
	Completed? Assigned By								
a									
	r diac (o tterna)								
	Completed?	 Number 	Assigned Date	Assigned By	Assigned To	Due Date	Assignment Type	Message / Task	
		PPMI-2009-000260	01/10/2010	St. Jean, Clint	180, Deb F		Follow-up Activity		
		LACP-2010-000012	27/09/2010	Jabbar, Abdul	St. Jean, Clint		Follow-up Activity		
		INCD000000172	02/08/2007	Kemper, Dale	St. Jean, Clint	30/11/2007	Follow-up Activity	Attend court for the	
•	True (4 items)								
	Completed?	Number	Assigned Date	Assigned By	Assigned To	Due Date	Assignment Type	Message / Task	
		CCWI-2011-02-00057	24/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity		
		CCWI-2011-02-00057	24/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity		
		CCWI-2011-02-00057	22/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity		
		PPMI-2009-000260	01/10/2010	St. Jean, Clint	180, Deb F		Follow-up Activity		

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.

Quinta from	Incidents1		INC-2013-04-00026 (AutoIncident617525839)				
QUICK VIEW	Enter filter text.	🗙 🧹 👌 🖶	Criminal/Assault/Injury/No Weapon	U			
Saved Views	☐ INC-2013-05-00009 (DeleteInci		Strue Mc Edit - Add X Dalata A Look - Drint M Sand A Cancel				
All Records	(0) Criminal	Open					
	(initInciden (i) (0) Criminal	UD Open	General Involvements Narratives Attachments Links Losses Investigation Controls A Details	▼ 4 }			
	(initInciden (i) (i) Criminal	Open	Incident Number Reported Date/Time INC-2013-04-00026 04(04/2013 01:14 PM				
	🗇 INC-2013-04-00028	Ψ.	File Number Occurred From Date/Time				
Activities	(0) Criminal	Open	AutoIncident617525839 04/04/2013 01:14 PM	=			
Incidents	🗇 INC-2013-04-00027 (AutoIncide	Ψ.	e-Incident Number Occurred To Date/Time				
Cases	(0) Criminal	Open					
Items	INC-2013-04-00026 (AutoIncide	Ω.					
Persons	0) Criminal/Assault/Injury/No Weapon	Open	Class Ste Level 1				
Orenninatione	☐ INC-2013-04-00025 (AutoIncide	0	Criminal				
Vehicles	U (0) Criminal	Open	Category Building Level 2				
venicies	INC-2013-04-00024 (AutoIncide	Ш.	Assault				
Dashboard	U (0) Criminal	Open	Subcategory Location Level 3				
	INC-2013-04-00023 (AutoIncide	Ψ.					
DispatchLog	U (0) Criminal	Open	Type Section Level 4				
	INC-2013-04-00022 (AutoIncide	<u>m</u>					
🚰 Data Forms	(0) Criminal	Open					
	INC-2013-04-00021 (AutoIncide	<u>m</u>	Summary				
Reports	(0) Criminal	Open					
	🗇 INC-2013-04-00019 (AutoIncide	ίΨ.					
Analysis Expert	(0) Criminal	Open					
-	🗇 INC-2013-04-00018	ίΨ.					
successive statements	(0) Criminal	Open		-			
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- 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.

^{*} 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.	Enter filter text
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.	Incidents
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.	I≪ 1/30 ►
To print the record list as it appears in the Listing pane, click the Print button located at the top of the Listing pane.	Incidents 4 Enter filter text X ✓ 24

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
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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.	♦ Involvements ♦ Narratives ♦ Attac
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.	 ♦ Narratives ♦ Attachments ♦ ↓
Expand or collapse a section to view or hide its contents.	Supplemental Details
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.	Last Name
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.	Last Name Unitialirst Name Initia Woodcott IJason
To sort the grid data by a particular column, click the column heading once. Click it again to sort the data in reverse order.	Last Name First Name Initia Woodcock Wendy L Parker Peter

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.

ltems

• 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

Ger	ieral
•	Create a new Organization record.
Con	itact(s)
•	List the organization's known addresses, phone numbers, and email addresses.
Linl	(S
•	Link the organization to a person. Link the organization to another organization. Link the organization to a vehicle.
Hist	ory
•	View the incidents the organization has been involved in. Add an incident associated with the organization into a case.
Atta	chments
•	Attach a file to the Organization record.
Con	trols
Det	ails
•	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

Common Record Functions

depends on user permissions.

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.

Qui	ck View
Sav	ed Views
	Workgroup A - Open Records
~	Workgroup B - Open Theft Last Month
2	Quick Edit
٩	Refresh

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.

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_ _	el as uela					//ow //a	_								
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0	None	0	And Or												
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- 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.

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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 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".

Incidents	р
INCD	× <u>≺</u> 2+ 🖶
🕆 INCD-2011-02-00021	12 E
(0) Non-Criminal	Open
🔒 INCD000000187	
(1) Policy Violation	Closed
G INCD000000186	
(3) Non-Criminal/Security & Safety Syste	Closed

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.

🛃 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.

Viewing Pane Toolbar

×	Delete	Removes an entire record from the database.
F	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.
* * 11 #	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.
8	Cancel	Switches the record from "edit" to "read-only" mode without saving changes.
Û	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 subtab, although they may be similar to the ones performed by the buttons included in the Viewing pane toolbar.

🚽 Save 🛛	📝 Edit 🖶 Add	📉 Delete 🔒 La	ock 븜 Print 🖂 Ser	nd 🛛 😧 Cancel			
♦ Gener	al 🔶 Involvem	ents 🔷 Narrativ	es 🔶 Attachmen	nts 🔶 Links	Loss Summary	🔶 Investigat ୶	Þ
Persons	Organizations	Vehicles Items					
= <u>Add</u>	New = <u>Edit</u>	Remove Go	<u>to</u>				
Involved	Person: 4						
٣	Linked Person	Last Name	First Name	Initial	Involvement Type	Date of Birth	
	Rebarski, Dana	Rebarski	Dana		Reported By	Fe	e

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.

Incident Number	Reported Date/Time 08/14/2013 10:50 AM
File Number	Occurred From Date/Time 08/14/2013 10:50 AM 🛟 🏢 🗙
e-Incident Number	Occurred To Date/Time

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.
- 6. 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.
- Identify which business unit the incident affected by selecting options from the Level 1 to Level 4 lookup lists, if applicable.
- 8. 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.

General Involve	ements N	arratives Attachmen	ts Links	s Losses	Investigation		Controls	-	4
Details									_
<pre>{ New Incidents9 } we @ Edit @ Add > Delete @ Lock @ Print @ Send @ Cancel emeral Involvements Narratives Attachments Links Losses Investigation ◆ Controls ♥ ◆ stals notdern Number</pre>									
ADMI-2013-00017	4	08/14/2013 11:53 AM	: 💷 🗙						
File Number		Occurred From Date/Tim	e						
TH-3012-B		08/13/2013 11:25 AM	• 🔳 🗙						
		Orenand To Data C							
e-Incident Number		Occurred To Date/Time	• 📷 💊	Incident Duration	1				
		06/13/2013 12:02 PM							
Class		Sto		Lovel 1					
Criminal	-	Engineering		APAC		-			
Category		Building		Level 2					
Assault	-	Production		Corporate Offic	;e •	-			
Subcategory		Location		Level 3					
Injury	•	Internal Components	•	Amazon		-			
Туре		Section		Level 4		_			
No Weapon	-	Circuit Boards	•			-			
Type No Weapon Summary On the above mentior lunch break, she was She was grabbed rou	the date and time assaulted while ghly by her arm	Internal Components Section Circuit Boards me, the complainant, Kathy e in her cubicle.	• Howard, rep	Amazon Level 4 xorted to security the building.	that during her				
Currently, there are n the cubicle section th Follow-up to be comp	o suspects in t ree rows over, leted.	his incident. The only avai and could only say that the	lable witness e assailant w	is Sandy Smith, as male. Investig	who is seated in ation continues.				

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**.
- 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**.

General Involvements	Narratives Attachments	Links Losses	Investigation	 Controls 	≂ ∢ ►
✤ Details					
Supplemental Details					
☑ Reported to Police	Police File Number OCC-131-94 Division Reported To				
Reported to Division	Security	•			
☑ Reported to Supervisor	Supervisor Reported To	₽ ×			
Follow-up Required	08/29/2013	X 💷 🗙			
¥ Flags					

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**.

 General 	 Involvements 	 Narratives 	 Attachments 	Links	♦ Losses 🔷 ♦	Investigation	••
Setails							
* Suppleme	ntal Details						
☆ Flags							
	Description			St	atus		
💓 V	Workplace Violence			No	•		
🎽 к	Suspect Known to Victin	m		Unkr	nown 🔻		
🧡 н	Hate Crime			No	-		
🧡 D	Drugs/Alcohol Involved	l		No	-		
👗 N	DHS			No	-		
Flag Note	s						
The incide	ent did not involve violen	ce.				*	

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**.

ancel								
Linked Person		Involvement Type			Associated Losse	5		
R No Value	₽ ×	Witness		-	Exposure			
Interviewed?		Injured			Averted Loss			
First Aid Administered?		Person Hospitalia	zed?		Total Loss			
					Total Recovered			
					Net Loss			
						View Losses and	Recoveries	
letails								
	First Name			Last Name Brown		Initial	Title	
				biowin		2		
	Date of Birt	1	•	Designation(s)		Gender		-
	03/07/19/4		• ··· •			mare		
1. 2. 1	Hair Color			Eye Color		Marital Status		
	Brown		•	Brown	•			•
	Height	Weight		Employee Number				
📇 🔉 📄 🖪	5	11"	200 lbs	38671		Employee?		
	Notes							
	The only a	vailable witness is J	eff Brown, who	sits in the cubicle sectio	n (ADMIN-77) three ro	ws over from Kathy.		

- 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.

6	Click to Add Clothing Details	
		×
	Clothing Type Color	
	Description	

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.

Elick to Add Injury Details		
		×
Injury Cause	Severity	
Description		

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.

🕂 🕂	d Ne	w Record						×
0	κI	😮 Cancel						
☆ FI	ags							1
		Description	Status		Severity		Flag Notes Jeff Brown is the only witness of the incident.	
٣	W	Wanted	Yes	•	Critical	Ŧ		
>	۷	Violent	Unknown	-		-		
1	т	Trespasser	Yes	•	Low	Ŧ		
1	I.	Infectious	No	•		-		
1	R	Escapee	No	-		Ŧ		
	A	Armed and Dangerous	No	•		Ŧ		Ξ
								 ļĻ

- 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

 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.

1	dit Record							X
ОК	Cancel							
	Linked Person	- V	Involvement Type		Associated Losse	5		_ 11
			Witness		Exposure		\$ 0	.00
	Interviewed?		injured		Averted Loss		\$ 0	.00
	First Aid Administered?		Person Hospitalized?		Total Loss		\$ 300	.00
					Total Recovered		\$ 50	.00
					Net Loss		\$ 250	.00
						View Losses and Rec	coveries	- 11
	Details							=
		First Name		Last Name		Initial	Title	
		Jeff		Brown		L	Mr. 💌	
		Date of Birth	ı	Designation(s)		Gender		
		03/07/1974	÷ 🎟 🗙			Male	•	
	TO T	Hair Color		Eye Color		Marital Status		
		Brown	-	Brown	•		•	
		Height	Weight	Employee Number				
		5	11" 200 lbs	38671		Employee?		
		Notes						
		The only a	vailable witness is Jeff Brown, who	sits in the cubicle section	(ADMIN-77) three row	vs over from Kathy.		

- 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.

Losse	es Associated	d To: Brown, Jeff	-			Test into		×
0	K Clos	se Add Loss	Add Recovery	Add No Impact	Edit	Remove		
	Date	Туре	Method/Sta	tus/Cause		Loss	Recovery	No Impact
08	8/14/2013	Direct				\$ 300.00 USD		
08	8/14/2013	Recovered					\$ 50.00 USD	

- 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.
- 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.

	Losses Associated To: Brown, Jeff		Internet		<u> </u>
	OK Close Add Loss	Add Recovery Add N	o Impact Edit Remove		
	Date Type	Method/Status/Cause	e Loss	Recovery	No Impact
	08/14/2013 Recovered		3 300.00 030	\$ 50.00 USD	
Edit Record					
K Cancel					_
Linked Person	Involvement Type		Associated Losses		
Ko Value	Witness		Exposure		\$ 0.00
Interviewed?	🕅 Injured		Averted Loss		\$ 0.00
First Aid Administered?	Person Hospitalize	ed?	Total Loss		\$ 300.00
			Total Recovered	*	\$ 50.00
			Net Loss		\$ 250.00
Detain			View Losse	s and Recoveries	
	First Name	Last Name	Initial	Title	
	Jeff	Brown	L	Mr.	•
1000	Date of Bith 03/07/1974	Designation(s)	Gender Male		•
	Hair Color	Eye Color	Marital Status		
	Brown	▼ Brown			•
🖷 🗴 📭	Height Weight	Employee Number 200 lbs 38671	Employee	?	
	Notes The only available witness is Jo	off Brown, who sits in the cubicle sec	tion (ADMIN-77) three rows over from Kz	thy.	

- 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.

	Gener	al 🔷 Involven	nents Narra	atives Atta	chments Lin	ks 🔶 Losses	Investigation 🔹	Controls	Audit History				
P	Persons Organizations Vehicles Items									-			
	nvolved	Person: 1											
	 <u>Add N</u> 	lew = <u>Ed</u>	lit • <u>R</u> e	emove	• <u>Go To</u>								
	٣	Last Name	Linked Person	First Name	Initial	Involvement Typ	e Date of Birth	Gender	Employee?	Interviewed?	Person Loss?	Notes	
		Brown		Jeff	L	Witness	03/07/1974	Male			V	The only availab	
		_	_	_	_	n	11	_	_	_	_		•

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.

🖶 Add New Record				x
OK Cancel				
Linked Organization	Organization Name Metropolitan Police Service Organization Number C-9870-D Notified By Control Center ✓ Contact Person Ind Interpret Leise	Involvement Type Responding Service/Agency Organization Type Municipal Agency Reference Number H-9870 Contact Phone 790 555 0123	Associated Losses Exposure Averted Loss Total Loss Total Recovered Net Loss	•
Comments Responding Officer: James T. Dole, B	adge #445.	· · · · · · · · · · · · · · · · · · ·	view Lusses Aird Necuveries	-

- 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.
- 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.
- 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**.

		Û
Request Type	Tracking Number	
Request Assigned To Person		
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.

♦ General ♦ Involvements	larratives Attachments 🔶	Links 🔶 Losses Inve	stigation	s Audit History			• •
Persons Organizations Vehicles	Items						
Involved Organizations: 2							
Add New Edit Remove	Go to						
Linked Organization Organ	nization Name Involvement Typ	oe Organization Number	Organization Type	Notified By	Comments	Organization Loss?	
Cape Breton Regional Police Cape B	areton Regiona Responding Serv	ic	Municipal Agency	Investigator		v	
Metropolitan Police Service Metropo	olitan Police S Responding Serv	ic C-9870-D	Municipal Agency	Control Center	Responding Offi		
Metropolitan Police Services	Organization Name Metropolitan Police Service Reference Number H-9870 Organization Type Municipal Agency Notified By Control Center	Contact Phone 780 555 0123 Organization Number C-9870-D Involvement Type Responding Service/Agency Contact Person Armando, Luis	Responses: Request: 0	0			

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**.

OK Cancel			
Linked Vehicle	License Plate	Involvement Type	Associated Losses
🗟 UDK665 🛛 🖶 🕻	VDK665	Suspect -	Exposure
	Disposition	Year	
and the second	Towed/Impounded -	2008 🗘	Averted Loss
	Make	Style	Total Loss
	Honda 💌	4 Door Sedan 💌	Total Recovered
	Model	Color	Net Loss
💁 💫 🧐 👝 💼 🖬	Ridgeline 👻	Red 💌	
	VIN	Vehicle Value	View Losses And Recoveries
Company Vehicle?	4LUKPI22222M33333	\$40,000.00 USD	
Country Canada	Driver Identified		
State\Province	Vehicle Driver		
Alberta	Brown, Rosie	🖶 🗙	
Comments			
Abandoned on premises. Stolen it	ems found inside.	*	
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.

♦ General ♦ Involvements N	larratives Attachments	◆ Links ◆ Losses Investigation ◆ Controls Audit History	${}^{\bullet}{}^{\bullet}$
Persons Organizations Vehicles	Items		
Involved Vehicles: 1			
<u>Add New</u> = <u>Edit</u> = <u>Remove</u>	<u>Go to</u>		
Linked Vehicle License I	Plate Involvement Type	Year Make / Model Vehicle Loss? Comments	
UDK665 - Honda/Ridgeline UDK665	Indirectly Involved	2007 Honda/Ridgeline 🔽 Abandoned on premises. Stolen items	
	License Plate UDK665 Year 2007 Involvement Type Indirectly Involved	Style 4 Door Wagon Disposition Towed/Impounded Color Red Velocity	
	4LUKPI222222M333333	\$ 40,000.00 USD	
() CB: keith - 2/24/2012 1:33:46 PM	- LM: keith - 2/24/2012 1:33:	46 PM	

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).

Add New Record			×
OK Cancel			
Linked kem	tem Name Laptop Computer Serial Number XTP-4005 Disposition Seized As Evidence * tem Value \$2.135.00 USD	Associated Losses Exposure Averted Loss Total Loss Total Recovered Net Loss View Losses And Recoveries	
✓ Item is Evidence? Item Category Corporate Property Item Type Laptop	tem Make Dell ▼ tem Model Inspiron E1705 ▼		_
Owner Identified/Known? Organization Owned By Organization Ow	Person Owned By		
	÷		Ŧ

- 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.

Total Narratives: 2 • Add New • Edit • Remove • Seal • Read Sealed Created By Date/Time Narrative Type Author 25/11/2010 5:25:07 PM Original Narrative Davis, Ian 25/11/2010 5:30:34 PM Follow-up Remnyakova, Svetlana A		Involvements valiatives Attaciments v Enixs v Eoses investigation v Controls Autor Instory	-
Add New Edit Remove Seal Read Sealed Created By Date/Time Narrative Type Author 25/11/2010 5:25:07 PM Original Narrative Davis, Ian 25/11/2010 5:30:34 PM Follow-up Remnyakova, Svetlana A November 25, 2010 On the 23rd of November, 2010, security received a call from the complainant Kathy Howard. Howard stated that her corporate laptop had been stolen during a break the previous day, 22nd of November, 2010, while she was away from her desk. November 25, 2010 November 25, 2010 November 25, 2010 November 2010, security received a call from the complainant Kathy Howard. Howard stated that her corporate laptop had been stolen during a break the previous day, 22nd of November, 2010, while she was away from her desk.	Total Nam	tives: 2	
Sealed Created By Date/Time Narrative Type Author 25/11/2010 5:25:07 PM Original Narrative Davis, Ian 25/11/2010 5:30:34 PM Follow-up Remnyakova, Svetlana A 25/11/2010 5:30:34 PM Follow-up Remnyakova, Svetlana A November 25, 2010 November, 2010, security received a call from the complainant Kathy Howard. Howard stated that her corporate laptop had been stolen during a break the previous day, 22rd of November, 2010, while she was away from her desk. Officer Davis responded and spoke with Kathy Howard who advised that she left her cubicle which is located in section 4Bof the administration office at approximately 04:20PM and went to the cafeteria. When she left her cubicle her corporat]	= Add N	zw = Edit = Remove = Seal = Read	
25/11/2010 5:25:07 PM Original Narrative Davis, Ian 25/11/2010 5:30:34 PM Follow-up Remnyakova, Svetlana A November 25, 2010 Remove a call from the complainant Kathy Howard. Howard stated that her corporate laptop had been stolen during a break the previous day, 22nd of November, 2010, while she was away from her desk. November 425, 2010 Remove a call from the complainant Kathy Howard. Howard stated that her corporate laptop had been stolen during a break the previous day, 22nd of November, 2010, while she was away from her desk. November 425, 2010 Remove a call from the complainant Kathy Howard. Howard stated that her corporate laptop had been stolen during a break the previous day. 22nd of November, 2010, while she was away from her desk. November 425, 2010 Remove a call from the complainant Kathy Howard. Howard Howard Stated that her corporate laptop had been stolen during a break the previous day. 22nd of November, 2010, while she was a way from her desk. November 425, 2010 Remove a call from the complainant Kathy Howard. Howard Howar	Sealed	Created By Date/Time Narrative Type Author	
25/11/2010 5:30:34 PM Follow-up Remnyakova, Svetlana A November 25, 2010 Image: Comparison of November, 2010, security received a call from the complainant Kathy Howard. Howard stated that her corporate laptop had been stolen during a break the revious day, 22nd of November, 2010, while she was away from her desk. Difficer Davis responded and spoke with Kathy Howard who advised that she left her cubicle which is located in section 4Bof the administration office at approximately 04:20PM and went to the cafeteria. When she left her cubicle her corporat]		25/11/2010 5:25:07 PM Original Narrative Davis, Ian	
November 25, 2010 On the 23rd of November, 2010, security received a call from the complainant Kathy Howard. Howard stated that her corporate laptop had been stolen during a break the previous day, 22rd of November, 2010, while she was away from her desk. Thicer Davis responded and spoke with Kathy Howard who advised that she left her cubicle which is located in section 4Bof the administration office at approximately 04:20PM and went to the cafeteria. When she left her cubicle her corporat]		25/11/2010 5:30:34 PM Follow-up Remnyakova, Svetlana A	
	lovember 2 In the 23m	15, 2010 of November, 2010, security received a call from the complainant Kathy Howard. Howard stated that her corporate laptop had been stolen during a break the in 2nd of Missinghes, 2010, while the unservice bradeline in the stated stated that her corporate laptop had been stolen during a break the	

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**.

Drag and drop fi	es below				- or -	Browse	
Remove	Attachment Titl	e	Attachment Type	Include when printing?		Description	
Remove							
Attachment Title	•						
Attachment To	_						
Attachment Typ	e •] Include when printing?				
Attachment Typ Description	e v] Include when printing?				
Attachment Typ Description	e v] Include when printing?				
Attachment Typ Description	e] Include when printing?	1			
Attachment Typ Description File Name	e] Include when printing?				
Attachment Typ Description File Name File Extension File Size	e *] Include when printing?	,			

- 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.

🖶 Add New Record		
OK Cancel		
Link Type Common Call Source	Linked From Activity	÷
Common Call Source: Phone 780 555 66	77 (Officer D. Clark)	4

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

♦ General ♦ Invo	Ivements Narratives	Attachments 🔷	Links 🔷 Loss	es Investigation	Audit History
¥ Case Links					
Incident Links					
☆ Activity Links					
Add New Edit	Remove Go to				
Number of Linked Activit	ies: 2				
Linked From Activity	Link Type	Link Effective Date	Notes		
ACT-2011-000015	Escalated to Investigation	18/05/2011			
ACT-2011-000129	Common Call Source	24/08/2011	Common Call S		
😟 ·					

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.

🕂 Add New Record	
V OK 🛛 🔞 Cancel	
Link Type Linked To Incident Same Class and Location Link Effective Date 26/11/2010	•
Notes The linked incident is also a Company Property Theft and occurred at the Site A, Building 1, Location 1.]	A

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

♦ General ♦ Inv	volvements Narratives	Attachments	◆ Links ◆ Losses Investigation ◆ Controls Audit History ◀ ►
¥ Case Links			
☆ Incident Links			
• Add New • Ed	it = <u>Remove</u> = <u>Add</u>	to Case	
Number of Linked Incid	dents: 2		
Linked To Incident	Link Type	Link Effective Date	e Notes
INCD000000148	Same Class and Location	26/11/2010	The linked incident is also a Company Property Theft and occurred at
INCD000000057	Common Suspect	27/11/2010	Common Suspect and M.O.
CB: removakova -	26/11/2010 11:07:45 AM . I	M: removakova - 26/1	/11/2010 11-07-45 AM
	20/11/2010 11:07:45 AM - L	.m. reminyakova - 20/1	/ 1/2010 11.07.45 AM
 Activity Links 			

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.

🕂 Add New Record				×
🖌 🗸 OK 🛛 🙆 Cancel				
Link Type		Linked From Case		
Common Person	-	LC CASE-2009-000058		
Link Effective Date				
22/12/2010	: 💷 🗙			
Notes				
The case is built aroun	d a common pe	rson.	*	
			-	

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

♦ General ♦ Involvements	Narratives Attachments	♦ Links ♦ Losses	Investigation	 Controls 	Audit History	••
☆ Case Links						
= <u>Add New</u> = <u>Edit</u> = <u>Rem</u>	nove = <u>Goto</u>					
Number of Linked Cases: 3						
Case Number Link T	Type Link Effective Date	Notes				
CASE-2010-000027 Common Or	rganization 01/12/2010	Similar theft pattern.				
ADMC-2009-000124 Common Or	rganization 07/01/2011	The case contains related in	cidents that occurr	ed in the commo	on organization.	
CASE-2009-000058 Common Pe	erson 22/12/2010	The case is built around a c	ommon person.			
🔨 CB: remnyakova - 26/11/2010) 12:31:22 PM - LM: remnyakova -	26/11/2010 12:31:22 PM				
✤ Incident Links						
 Activity Links 						

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.
- 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).

 General 	 Involvement 	ts Narratives	Attachments	Links	♦ Losses	Investigation	 Controls 	Audit History		★ ►
* Loss And F	Recovery Details								Total	
Incident Loss Add Loss Date 	s Summary: 7 Los	ses: 3 Recoveries: ery = <u>Add No In</u>	2 No Impact: 2 <u>npact</u> = <u>Edit</u>	 <u>Remove</u> Method/State 	atus/Cause	loss	Becovery	No Impact	Total Exposure Total Averted Total Loss Total Recoveries	\$ 2,125.00 USD \$ 790.00 USD \$ 8,442.00 USD \$ 680.00 USD
01/19/2012	Incidents	Associated To	Direct	ACH/Stoler	n/Deliberat	\$ 2.492.00 US	Recovery	No impact	Net Loss	\$ 7,762.00 USD
02/15/2012	Item Involvem	Wallet	Direct	Wired Tran	isfer/Lost/A	\$ 3,225.00 US			Losses Direct	\$ 5,717.00 USD
01/25/2012	Organization I	Cape Breton Re	On-line Purcha	Merchant C	Credit		\$ 80.00 USD		Indirect	\$ 2,725.00 USD
01/30/2012	Organization I	Sydney Police S	Exposure	Cheque/Sto	olen/Intenti			\$ 2,125.00 USD	Recoveries Physical	\$ 600.00 USD
01/25/2012	Person Involve	Brown, Jeff	Indirect	ACH/Lost/I	ntentional	\$ 2,725.00 US			On-line Purchase	\$ 80.00 USD
02/23/2012	Person Involve	Hatfield, Carme	Averted	Cash/Unint	tentional -			\$ 790.00 USD	No Impact	
02/24/2012	Vehicle Involve	UDK665	Physical	Wright-off			\$ 600.00 US		Exposure Averted	\$ 2,125.00 USD \$ 790.00 USD

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.

etails Summaries Logs In	terviews Evidence/Property			
General				
Investigation Initiated By Person	Total Time Spent:	0 Hrs.		
Investigation Start Date	Total Expenses:	\$ 0.00 USD		
23/11/2010 : 🛄 🕽	Total Evidence:	0		
Investigation Last Review Date	Number of Interviews:	0		
Investigation Closed Date	Number of Investigators:	0		
15/12/2010 : 💷 🕽	Investigation Duration:	3 day(s)		
		Update		
Investigation Comments				
The investigation was initially assigne Davis.	d to Officer Mairon Alvarez. Then, it was pa	issed on to Officer Ian		
		.		

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.

🕂 Add New Record	
🖌 🛷 OK 🛛 🔞 Cancel	
Investigator Type Lead Investigator Assigned Date 23/11/2010 12:00 PM : I X	Investigator Impediator Implementation Implementation
Comments The investigation was passed on to D incident was reported.	avis on the same date as the

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

♦ General	Involvements <	Narratives 🔷	Attachments	♦ Links	♦ Losses	Investigation	 Controls 	Audit History	e
Details Summ	aries Logs Inter	views Evidence	e/Property						
¥ General									
Investigators									
Add New	Edit Remove								
Total Investigato	ors: 3								
Assigned Date	Investigator Type	Investigator	Completed Date	Comments					
23/11/2010	Lead Investigator	Davis, lan		The investigati	on was passed on t	o Davis on the same	e dat		
16/08/2011	Assisting Investigator	Adams, Abbott							
24/11/2010	Assisting Investigator	Campbell, Keith	26/11/2010	Officer Campbe	ell's involvement in	the investigation wa	is ter		
👔 CB: remnyal	kova - 26/11/2010 3:16	:58 PM - LM: davis	s - 26/11/2010 3:43	3:24 PM					

- 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.

	Otherwise, click Close to	exit this window without sending any information.
	Туре	Send Notification To
7	Assigned Investigation	Davis, lan (idavis@ppm2000.com)
	Assigned Investigation	Campbell, Keith (Email cannot be sent.)

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.
- 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**.

🖶 Ac	dd New Record		- • •
1	DK 🔯 Cancel		
	A Cancel Task Type General Investigation Expense Type Administrative Sepense Amount S120.50 CDN Follow-up Required? Log Notes Background checks.	Task Done By Person	*
			Ŧ

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

♦ General ♦ Involv	rements 🔷 N	arratives 🔸 Att	achments 🔶 Links	♦ Losses	 Investigation 	 Controls 	Audit History	
Details Summaries	Logs Intervie	ews Evidence/Pro	perty					
= <u>Add New</u> = <u>Edit</u>	Remove							
Total: 3								
Follow-up Required?	Task Date	Task Type	Task Done By Person	Time Spent	Expense Type	Expense Amount		
$\overline{\mathbf{v}}$	25/11/2010	General Investig	Campbell, Keith	8.0 hrs		\$ 0.0 USE)	
v	26/11/2010	Interview	Davis, Ian	2.0 hrs	Administrative	\$ 5.5 USE)	
	26/11/2010	General Investig	Davis, Ian	10.5 hrs	Administrative	\$ 120.5 USE)	
Background checks								
background checks.								Â
								-
1/20 CB: davis - 26/11/20	10 4:55:59 PM - L	M: davis - 26/11/20	10 4:55:59 PM					

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.
- 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.

-			Interview Editor			- = X
Interview Imp	port/Export Tools Spel	ling				
Accept & Cancel & Return Return Document	Cut Copy Paste Edit	B Z U ↔	Normal Page Style Text Style	Float Inte	Sealed Show\Hide Fields Enview Details	
Interview Type Interview	Subject of Interview	Subje	ct's Involvement Type ect of Interest	Interview Conducted	iby 🐈 🗙	
Start Date / Time 27/11/2010 10:30 AM C	End Date / Time 27/11/2010 12:30 PM	Cocat	ion of Interview ty office, Interview room #1	Witness White, Pamela - Bad	ge 335 🛛 🗹 I	nterview Recorded?
Arial Narrow 💌	· 11 · • ∰ ☷ ⊑ ¶ 1	00% v [Nomal]	•			
▶sgansan Parang	· · · · I ² · · · · · · I ³ · · · ·	· · · . [⁴ · · · · ·	l ⁶ l ⁶ <mark>.</mark>	⊀ 17	I ⁸	. I ⁹
		Interv	iew Report			<u>^</u>
	Date of Interv Time of Interv Location of In Interviewer: Interviewee:	iew: view: nterview:	November 27, 2010 10:30 AM Security office, room #1 Ian Davis Jeff Brown			=
Interview Narrative:	ation from another employee that	at sav vou were invo	lved in the thefts from Section	on 1 in Building Ath	his month Isthistrue	a -
				an i m sainting A ti		

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.

♦ Gene	ral 🔷 Involven	nents 🔶 Narratives	s 🔶 Attachments 🔶	Links 🔶 Losses	 Investigation 	♦ Controls Audit His	story 🔹 🕨
Details	Summaries Lo	ogs Interviews E	vidence/Property				
• <u>Add</u>	New Edit	<u>Remove</u> <u>Seal</u>	<u>Read</u>				
Total: 1							
Sealed	Interview Type	Subject of Interview	Subject's Involvement Type	Interview Conducted by	Start Date / Time	Interview Recorded?	
	Interview	Brown, Jeff L	Subject of Interest	Davis, Ian	27/11/2010 10:30 AM		
Date of Ir Novembe Time of Ir 10:30 AN Location Security of Interview Jeff Brow	nterview: r 27, 2010 terview: of Interview: fifice, room #1 er: ee: n		Interview Report				E
🌒 CB:	davis - 26/11/2010	5:17:05 PM - LM: davis	- 29/11/2010 2:56:45 PM				

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).
- 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.

lecord OK 🔀 Cancel			
Details			
	Evidence / Property Name Recovered Missing PDA Evidence / Property Type Recovered Owner Name Organization IC, Advanced Security Inc.	Found / Seized Date/Time 27/11/2010 12:00 PM Found / Seized Location Desk of Jeff Brown, ADMIN-77 Seized By Person Image: Construction of the seized From Person Seized From Person Image: Brown, Jeff L	
	Notes PDA seized from Jeff Brown's desk draw	ver. Returned to owner.	
Current Status	Notes PDA seized from Jeff Brown's desk drav Disposition	rer. Returned to owner.	
Current Status Evidence Status Unsecured	Notes PDA seized from Jeff Brown's desk drav Disposition Released to Owner	rer. Returned to owner.	
Current Status Evidence Status Unsecured Person In Possession R Howard, Katheri 🖶 X Chain of Custody	Notes PDA seized from Jeff Brown's desk drav Disposition Released to Owner Evidence / Property Tag 06-T4563	rer. Returned to owner.	
Current Status Evidence Status Unsecured Person In Possession Reson	Notes PDA seized from Jeff Brown's desk drav Disposition Released to Owner Evidence / Property Tag 06-T4563 Evidence Status Disposition	er. Returned to owner.	ide
Current Status Evidence Status Unsecured Person In Possession Howard, Katheri + > Chain of Custody Status Changed Date/Time	Notes PDA seized from Jeff Brown's desk drav Disposition Released to Owner Evidence / Property Tag 06-T4563 Evidence Status Disposition	er. Returned to owner.	ide

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

♦ General ♦ Involvem	ents 🔶 Narratives	♦ Attachments ♦ Lin	nks 🔶 Losses	 Investigation 	♦ Controls	Audit History (
Details Summaries Lo	ogs Interviews Evide	nce/Property				
= <u>Add New</u> = <u>Edit</u>	Remove					
Total: 1						
Evidence / Property Name	Evidence / Property Tag	Evidence / Property Type	Found / Seized Date/Time	Disposition	Evidence Status	
Recovered Missing PDA	06-T4563	Found	27/11/2010 12:00 PM	Released to Owner	Unsecured	
	Evidence / Property Nan Recovered Missing PD Notes PDA seized from Jeff B	ne A irown's desk drawer. Return	ed to owner.			
😢 CB: davis - 29/11/2010	5:38:19 PM - LM: remnyako	wa - 25/08/2011 4:57:46 PM	1			

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.

🛆 CI	hain of Custody Details	×
1	One or more of the status fields have changed.Enter the date of when the changed occurred and why.	
	Status Changed Date/Time	
	29/11/2010 12:00 PM 🛟 🎟 🗙	
	Reason for Status Change	
	PDA released to owner.	*
		*
	V OK Cancel	

- 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.

		Evidence / Prope Recovered Missing Evidence / Prope	rty Name g PDA ty Type		Found / Seized 27/11/2010 12:0 Found / Seined	Date/Time 10 PM : IIII X
Current Status Evidence Status Secured		Disposition Released to Own	ner	Secureo	d / Storage Locat	ion
		Evidence / Prope	ertv Tao			
Person In Possessio	n ri 🖶 🗙 (D6-T4563	.,,			
Person In Possessio	n ri 🖶 🗙 (D6-T4563			🗏 <u>Print</u> 2	Update Chain of Custody
Person In Possessic EQ Howard, Kathe Chain of Custody Status Changed D	n ri 🖶 X (Evidence Status	s Disposition	Storage F	erson In Pos	Bint 2	Update Chain of Custody Reason for Status Change
Person In Possessic Chain of Custody Status Changed D 29/11/2010	ri 🖶 🗙 0	s Disposition Released t.	Storage F	erson In Pos oward, Kath	Print 2 Evidence / P 06-T4563	Update Chain of Custody Reason for Status Change PDA released to owner.
Person In Possessic Chain of Custody Status Changed D 29/11/2010 07/06/2011	in ri 🖶 🗙 0 Evidence Status Unsecured Secured	s Disposition Released t	Storage P H	erson In Pos oward, Kath.	Print 2 Evidence / P 06-T4563 06-T4563	Update Chain of Custody Reason for Status Change PDA released to owner. The evidence has been re-clai.

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.

♦ General ♦ Involvements ♦ N	Varratives 🔶 Attachments <	▶ Links ◆ Losses	 Investigation 	•
Details Summaries Logs Intervi	ews Evidence/Property			
☆ General				
Investigation Initiated By Person Davis, Ian Image: Comparison of the comp	Total Time Spent: Total Expenses: Total Evidence: Number of Interviews: Number of Investigators:	20.5 Hrs. \$ 126.00 CDN 1 1 4		
15/12/2010 : 🎟 🗙	Investigation Duration:	22 day(s) Update		
L				
Investigation Comments The investigation was initially assigned to Davis.	Officer Mairon Alvarez. Then, it was pi	assed on to Officer Ian		
✤ Investigators				

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 will have access to the record, while the user whose organizational rollup is North America/Canada/Alberta.

 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.

♦ Gene	eral 🔷 Invo	olvements	٠	Narratives	♦ Atta	chments	•	Links	♦ Lo	sses		Investigation	•
Details	Outcome	Reviews	Assig	gnments									
* Cont	rols												
Org I Nort Org I Can Org I Albe Org I Edm	Level 1 In America Level 2 ada Level 3 arta Level 4 conton	·	•	Access Level Level 3 Status Open Disposition Under Invest Expiry Date 24/11/2011	igation	: 💷	• •	Archiv Record C	re (Record i Dwner ms, Teny	is not visible	=) <mark>×</mark>		
¥ Work	group Visibiliti	es											

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.
- 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.

Add Workgroup Exceptions		×
Workgroup	Update	None
Workgroup A	V	
Workgroup B	V	
Workgroup C		V
▶Ø Workgroup D	V	
Workgroup E		-
		OK Cancel

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

♦ General ♦ Involvements Narratives	Attachments 🔷	Links 🔷	Losses	Investigation <	Controls Au 🔹 🕨
Details Outcome Reviews Assignments					
* Controls					
Workgroup Visibilities					
Owner Workgroup (Full Rights)	All Other Workgroups				
Ontario 👻	Read	-			
Add Exception(s) X Remove					
Workgroup		Read		Update	
Workgroup Administrator - PPM2000 Workgroup - Do m	ot delete	Read		Update	
Workgroup Administrator - PPM2000 Workgroup - Do n Advanced Users	ot delete	Read		Update	
Workgroup Administrator - PPM2000 Workgroup - Do n Advanced Users	ot delete	Read		Update	
Workgroup Administrator - PPM2000 Workgroup - Do n Advanced Users	ot delete	Read V		Update	
Workgroup Administrator - PPM2000 Workgroup - Do n Advanced Users	ot delete	Read		Update	

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.

etails Outcome Review	s Assignm	nents			
Policy Name:					
Corporate IT Security Po	су	Policy Affected			
Primary Cause		Secondary Cause			
Unintentional Act	-	Careless Actions	-		
Corrective Action Summ	ary				
Complainant did not have Notice sent out to all staf	the "desk loc to ensure use	ck" on the laptop, as required by T e of desk locks when not attending	SD-121. g desk.	A	

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.

🕂 Add New Record		- • •
🖌 🛷 OK 🛛 🔞 Cancel		
Review Type Departmental Review Review Date 10/12/2010 01:20 PM : I X Comments	Reviewed By Person	÷
Final review. Investigation closed.		4

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

Details Outcome Reviews Assignments • Add New • Edit • Remove Total Reviews: 2 Review Date Review Type Reviewed By Person	
Add New Edit Remove Total Reviews: 2 Review Date Review Type Reviewed By Person	
Total Reviews: 2 Review Date Reviewed By Person	
Review Date Review Type Reviewed By Person	
10/12/2010 Departmental Review Davis, Ian	
26/11/2010 Departmental Review Davis, Ian	

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.

■ Add New Record		
🖉 OK 🛛 🔀 Cancel		
Assignment Type	Assigned By Person	
Information Request	🖾 Davis, Ian	+
Assigned Date	Assigned To Person	
24/11/2010 10:00 AM 📫 🛄 🗙	🖾 Campbell, Keith	4
Due Date		
25/11/2010 11:00 AM 📫 🛄 🗙	Completed?	
Completed Date		
25/11/2010 01:00 PM		
Message / Task		
Background check on Jeff Brown.		*
		T

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

♦ General	Involvements	Narratives	Attachments	is 🔶 Losses	 Investigation 	♦ Controls	Audit History ()					
Details Outco	me Reviews	Assignments										
Add New Edit Remove Notify Total Assignments: 3 Completed Assignments: 1												
Completed?	Assigned Date	Assignment Type	Assigned By Person	Assigned To Person	Message / Task							
	13/12/2010	Verification	Davis, Ian	Baker, Susan	Please, verify the nec	essary data has	b					
	23/11/2010	Follow-up Activity	Baker, Susan	Davis, Ian	Please, interview the	complainant and	o					
	24/11/2010	Information Request	Davis, Ian	Campbell, Keith	Background check on	Jeff Brown.						
🐧 CB: davis - (01/12/2010 12:55:4	5 PM - LM: davis - 01/1	2/2010 12:55:45 PM									

- 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.

ľ	Record changes have be the email addresses lister Otherwise, click Close to	een saved. To send any of the following auto-notifications to d, ensure the appropriate checkboxes are selected and click Send. exit this window without sending any information.					
	Туре	Send Notification To					
V	Assigned Investigation	Davis, Ian (idavis@ppm2000.com)					
	Assigned Investigation ? Campbell, Keith (Email cannot be sent.)						

- 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**.

🖳 Send	Message				×				
Mail									
	Attachments Priority Mail Document	Cut Copy Paste	ABC Check	To: ian_davis@advancedsecurity.com; CC: Subject: Assignment Reminder (Incident Number: ADMI-2010-00 Mail Properties Options					
1	1I ¹	I ²		. I ⁴ I ⁵ I ⁶ I ⁷ I ⁸	с н н				
Assig	nment Details				*				
Assig	ned By		Da	vis, lan					
Assigned To			Са	mpbell, Keith	E				
Assigned Date			24	24/11/2010 10:00:00 AM					
Due D	Date		25	11/2010 11:00:00 AM					
Comp	Completed?			Yes					
Comp	leted Date		25	11/2010 1:00:00 PM					
Messa	age / Task		Ва	ckground check on Jeff Brown.					
					_				
Incide Crimin	ent Details for ADN nal/Theft/Company	II-2010-000124 Property/Over \$1000			Ŧ				

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.

Get Audit History UserID Drag a Solumn header h	ere to group by tha	at column.			Before: (NULL)
DateTime (GMT)	UserID	Record Action	Control Changes	Machine Info	InvestigatorAssignedDate
2011/06/07 10:39:05	remnyakova	Update		192.168.1.94	After: 11/23/2010 12:00:00
2011/06/07 09:00:16	remnyakova	Update		192.168.1.94	■·· Investigator I ypeLookupID ···· Before: (NULL)
2011/06/07 08:20:12	remnyakova	Update		192.168.1.94	After: 76d61bd8-3b70-4900 ⊡ InvestigatorType
2011/06/07 08:20:00	remnyakova	Update		192.168.1.94	Before: (NULL) After: Lead Investigator
2011/06/07 08:19:58	remnyakova	Update		192.168.1.94	
2011/06/07 08:19:37	remnyakova	Update		192.168.1.94	After: 85b0dd38-9cff-49d8-
2011/06/07 08:19:09	remnyakova	Update		192.168.1.94	Before: (NULL)
2011/06/07 08:19:01	remnyakova	Update		192.168.1.94	
2011/06/07 08:18:56	remnyakova	Update		192.168.1.94	After: The investigation was
					•
					Summary - ADMI-2010-000124
					Record Count: 9 User: remnyakova Record Action: Update Date/Time Yours: 07/06/2011 2:18:56 PM Users: 07/06/2011 8:18:56 PM GMT: 07/06/2011 8:18:56 PM

- 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.

 Involvements Get Audit His Control Chan CoserID / 	Narratives story ges Control Changes	 Attachmen 	ts 🔷 Links	◆ Losses	 Investigation 	Controls	Audit History	(↓) 186-4a9€
DateTim	e (GMT)	Record Action	Machine Info			Billion Billion	igatorAssigned Da sfore: (NULL)	ste
 UserID : remny Control Cha 2011/0 2011/0 2011/0 2011/0 2011/0 2011/0 2011/0 2011/0 2011/0 	vakova (1 item) anges : (9 items) 6/07 10:39:05 6/07 09:00:16 6/07 08:20:12 6/07 08:20:00 6/07 08:19:58 6/07 08:19:37	Update Update Update Update Update Update	192.168.1.94 192.168.1.94 192.168.1.94 192.168.1.94 192.168.1.94 192.168.1.94 192.168.1.94				ter: 1723/2010 igatorTypeLooku fore: (NULL) ter: 76d61bd8-3b igatorType sfore: (NULL) ter: Lead Investig igatorPersonID sfore: (NULL) ter: 85b0dd38-9c igator fore: (NULL) ter: Davis, Ian	pID ,70-490C ,ator ,ff-49d8-
2011/0	6/07 08:19:09	Update	192.168.1.94			⊡ · Comm	ents efore: (NULL) ter: The investiga	ition was
2011/0	6/07 08:19:01	Update	192.168.1.94				III	
2011/0	6/07 08:18:56	Update	192.168.1.94			Summary - /	DMI-2010-00	0124
						Record Count User: remnyak Record Action Date/Time Yours: 07/06/ GMT: 07/06/	: 9 ova :: Update 2011 2:18:56 PN 2011 2:18:56 PM 2011 8:18:56 PM	1

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 $\stackrel{\bullet}{=}$ 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.

ave 🛛 📝 Edit 📲 Add 🗙 Dele	te 🔒 Lock 🚔 Print 🖂 Ser	nd 🛞 Cancel						
General	 Narratives Attachmen 	ts 🔷 Links	 Losses 	 Investigations 	◆ Controls	Audit History		
Details							☆ Case Summary	
							Status	Op
Case Number	Case Start Date						Case Duration 1 ye	ear(s) 6 month(s) 30 day
CASE-2009-000002	04/01/2011 12:00 AM						Number of Case Investigators	
Case Name	Last Reviewed Date						Number of Linked Incidents	
Sen brown Nestraining Order	0.0.10.						Initial Incident Occurred	8/11/2010 4:18:03
Case Category Criminal Events	Case Closed Date						Disposition	
Lase Manager	Case Supervisor						☆ Investigation Summary	
ino valac							Total Time Spent	39 hr(s) 30 m
Link New Incident Link	New Case						Total Expense	\$ 436.000
							Total Evidence	
Case Description Test							Number of Interviews	
reat							Number of Incident Investigators	
							Total Investigation Duration	1324 09 D
							Number of legidents lowertingted	1024.00 D
							Number of Incluents Investigated	
							Incidents Not Investigated	
vestigators							* Involvement Summary	
						^	Number of Persons	
al Investigators: I							Number of Organizations	
Add New = Edit = Remov	e					-	Number of Items	
igned Date Investigator Inv	estigator Type Completed Date	Comments				=	Number of Vehicles	
/3/2009 Glade. George Lea	d Investigator	Investigating a p						
							☆ Loss Summary	
							Total Exposure	\$ 0.000
							Total Averted	\$ 20.00
							Total Loss	\$ 109,589.00
							Total Recoveries	\$ 1,545.000
						-	Net Less	e 100 044 00 0

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.

🖶 Add New Record	
🛛 🛷 OK 🛛 🔞 Cancel	
Investigator Type Assisting Investigator Assigned Date 24/11/2010 12:00 PM : III X Comments Officer Campbell has been dismissed	Investigator Completed Date 26/11/2010 12:00 PM : III X due to the conflict of interests.

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

 ♦ General ♦ Involvements ♦ Narratives ♦ Attachments ♦ Links ♦ Losses 	 Investigation Controls Audit History
★ Details	☆ Case Summary
✿ Investigators	Status Open
= Add New = Edit = Remove	Case Duration 9 month(s) 13 day(s)
Total Investigators: 2	Number of Case Investigators 2
	Number of Linked Incidents 3
Assigned Date Investigator Type Completed Date Comments	Initial Incident Occurred 13/10/2009 5:32:04 PM
24/11/2010 Campbell, Keith Assisting Investigator 26/11/2010 Officer Campbell has been disr	Disposition Active
23/11/2010 Davis, Ian Lead Investigator	
	* Investigation Summary
	Total Time Spent 65 hour(s) 50 minute(s)
	Total Expense \$ 426.00 USD
	Total Evidence 2
CB: davis - 01/12/2010 5:51:07 PM - LM: davis - 01/12/2010 5:51:07 PM	

- 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.

🖂 Aut	o Notification		×							
="	Record changes have been saved. To send any of the following auto-notifications to the email addresses listed, ensure the appropriate checkboxes are selected and click Send. Otherwise, click Close to exit this window without sending any information.									
	Туре	Send Notification To								
	Assigned Investigation	Campbell, Keith (Email cannot be sent.)								
	Image: Assigned Investigation Davis, Ian (ian_davis@advancedsecurity.com)									
		S								
<u>Sele</u>	e <u>ct All</u> <u>Deselect All</u> Ser	nd Formatted 🗹 Close 🖂 Send								

View All Case's Involvements

- 1. Select the **Involvements** tab.
- 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.

History										
IncidentNumber	FileNumber	ClassName	Class	Category	OccurredDateTime	SiteName	IncidentStatus	InvolvementType	InvestigationStartDate	
ADMI-2010-0001	TH-3079-B	Criminal/Th	Criminal	Theft	22/11/2010	Site A/Buil	Open	Victim	23/11/2010	
ADMI-2011-01-00		Criminal/Th	Criminal	Theft	20/01/2011	Acme Univ	Open	Witness		
INCD000000183	ABC	Criminal/Fire	Criminal	Fire	09/03/2009	Site A/Buil	Closed	Complainant	28/04/2009	

- 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.

General Involve Persons Organizations History Go to Per	ments < Vehicles sons =	 Narratives Items Go to Incidents 	 Attachments 	♦ Links ♦ Loss	es ♦ In	vestigation	♦ Controls	Audit History
Involved Person(s): 3	Employee(s): 3 Inten	viewed: 3					
Incident Number La	ast Name	First Nan	ne Involvement	Type Birthdate	Gender	Employee	Interviewed	
ADMI-2010-000124 Howa	ard	Katherine	Victim	03/06/1983	Female	~	V	
INC-2009-000265 Ande	rson	Peggy Sue	Reported By		Female		▼	
ADMI-2010-000124 Brow	n	Jeff	Witness	26/03/1980	Male			
-	Mr. Birthdate 26/03/19 Hair Colo	Jeff 80	Gender Male Eye Color	Brown Marital Status Divorced	Witness Designation(s)			
Notes The only available witnes section (ADMIN-77) three	Brown ss is Jeff Br e rows over	own whois sea Kathy Howard.	Blue ated in the cubicle	✓ Interviewed?✓ Employee?				
				 First Aid Adminis Injured Person Hospitali 	stered? zed?			

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** with 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.

🖶 Add New Record		- • ×
OK Cancel		
Link Type	Link Incident To Case	÷
Link Effective Date		
Notes		

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.

♦ General ♦ Invo	olvements 🔷 Narrati	ves 🔶 Attachme	nts 🔶 Links 🔶	Losses	 Investigation 	 Controls 	Audit History		
✿ Linked Incidents									
• <u>Add New</u> • <u>Edit</u> • <u>Remove</u> • <u>Go to</u>									
Number of Linked Incid	ents: 3								
Link Incident To Case	Link Type	Link Effective Date	Notes						
ADMI-2010-000124	Common Organization	01/12/2010	Similar theft pattern.						
ADMI-2009-000294	Related Incidents	02/12/2010							
INC-2009-000265	Common Organization	01/12/2010	Advanced Security Ltd.	, Human Resources					
🐧 CB: davis - 01/12/2	2010 5:19:25 PM - LM: da	avis - 01/12/2010 5:19):25 PM						
¥ Linked Cases									

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.

♦ General ♦ In	volvements 🔷 Na	rratives 🔶 Atta	achments 🔷 Links	♦ Losses	Investigation	♦ Controls	Audit History			
Linked Incidents										
Linked Cases	☆ Linked Cases									
• <u>Add New</u> • <u>E</u>	dit • <u>Remove</u>	Go to								
Number of Linked Ca	ses: 2									
Linked From Case	Linked To Case	Link Case Name	Link Type	Link Effective Date	Notes					
CASE-2010-000028	CASE-2010-000027	Internal Thefts	Common Suspect	02/12/2010						
CASE-2010-000027	ADMC-2010-000016	4534534	Same Class and Location	01/12/2010	Both cases involve th	neft at the s				
🍿 CB: davis - 01/12	2/2010 5:19:25 PM - LM	1: davis - 01/12/201	IO 5:19:25 PM							

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*.

♦ General ♦	Involvements	 Narratives 	 Attachments 	Links	Losses	♦ Inve	estigation 🔶	Controls Audit Hist	ory	
* Loss And Recover	ry Details								Totals	
Total Incidents:4 In = <u>Go To Incident</u>	icident With L	osses:2 Losses:4 R	ecoveries:2 No Imp	act:2					Total Exposure Total Averted Total Loss	\$ 2,125.00 USD \$ 790.00 USD \$ 9,753.78 USD
IncidentID	Date	~ v	Associated To	Туре	Loss		Recovery	No Impact	Total Recoveries Net Loss	\$ 680.00 USD \$ 9.073 78 USD
INCD000000167	01/19/20	Incidents		Direct	\$ 2,492.00	0 USD			Averages	• 0,070.70 000
SHI-2011-000018	01/27/2011	Item Involvement	Car Stereo	Direct	\$ 1,311.78	8 USD			Average Exposure	\$ 531.25 USD
INCD000000167	02/15/2012	Item Involvement	Wallet	Direct	\$ 3,225.00	0 USD			Average Averted Average Loss	\$ 197.50 USD \$ 2 438 45 USD
INCD000000167	01/25/2012	Organization Inv	Cape Breton Re	On-line Purc		ş	\$ 80.00 USD		Average Recoveries	\$ 170.00 USD
INCD000000167	01/30/2012	Organization Inv	Sydney Police S	Exposure				\$ 2,125.00 USD	Average Net Loss	\$ 2,268.45 USD
INCD000000167	01/25/2012	Person Involve	Brown, Jeff	Indirect	\$ 2,725.00	0 USD				
INCD000000167	02/23/2012	Person Involve	Hatfield, Carmen	Averted				\$ 790.00 USD		
INCD000000167	02/24/2012	Vehicle Involve	UDK665	Physical		s	600.00 USD			
									•	•

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.

♦ General ♦ Involv	vements 🔷 🔶 Narr	ratives 🔷 Attachr	ments 🔷 Links	♦ Losses	♦ Investigation	Controls Audit History				
Details Summaries	Logs Interviews	Evidence/Propert	y							
☆ General	✿ General									
Go to Incidents										
Total Number of Investigations: 2 Total Duration: 98 57 day(s) Average Duration: 49 28 day(s)										
Total Hamber of Investig	Total Number of Investigations, 2 Total Duration, 30,37 day(s) Average Duration; 43,28 day(s)									
Incident Number	Start Date	e Initiated By	Review Dat	e Close Da	te Investigation Duration	Δ				
ADMI-2010-0001	24 23/11/201	0 Davis, lan	09/12/2010) 15/12/201	0 22.0 day(s)				
MPDI-000000008	MPDI-000000085 24/03/2011				76.57 day(s))				
Linked Incident Invest	igators									
Total Number of Investig	ators Assigned: 5	Number Investigato	ors Involved: 4							
IncidentID	Assigned Date	Investigator Type 🛆	Investigator	Completed Date	Comments					
ADMI-2010-0001	24/11/2010	Assisting Investigat	Campbell, Keith	26/11/2010	Officer Campbell's involvem					
ADMI-2010-0001	23/11/2010	Lead Investigator	Davis, Ian		The investigation was pass					
AD MI-2010-0001	07/06/2011	Lead Investigator	Remnyakova, Sv							
ADMI-2010-0001	23/11/2010	Lead Investigator	Davis, lan		The investigation was pass					

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 subtab 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.

☆ Case Summary	
Status	Open
Case Duration	6 month(s) 14 day(s)
Number of Case Investigators	2
Number of Linked Incidents	2
Initial Incident Occurred	22/11/2010 4:20:00 PM
Disposition	Active

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.

* Involvement Summary	
Number of Persons	3
Number of Organizations	2
Number of Items	3
Number of Vehicles	2

Loss Summary

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

* Loss Summary							
Total Exposure	\$ 2,125.00 USD						
Total Averted	\$ 790.00 USD						
Total Loss	\$ 9,753.78 USD						
Total Recoveries	\$ 680.00 USD						
Net Loss	\$ 9,073.78 USD						

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 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.
- 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.

Activity Number					
ACT-2011-000022					
Reported Date/Time	Code	Level 1		Priority	
19/05/2011 12:01 PM 📫 🧰 🗙	900B	Alarm	•	Intermediate	
Assigned Date/Time		Level 2			
19/05/2011 10:00 AM 📫 🎹 🗙		Fire	-		
Closed Date/Time		Level 3			
19/05/2011 11:30 AM 🚦 🎹 🗙			-		

- 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.

Site		Address	Country	
Acme University	-	3 Main Street	Canada	
Building		Address 2	State\Province	
Administration Building	-		Alberta	
Location		Postal Code	City	
East Wing	-	T5H 1Y6	Edmonton	
Section				
Front Entrance	-	Off Site		

- 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.

Call Source		Call Taken By		Dispatched By	
External Caller - Cell	-	🖾 Baker, Gordon	- 🕂 🕂	🖾 Davis, lan	🕂 🕂
Contact Number		Initiated By			
780 555 4444		D Zeven, Jeff	- 🖶 🗙		

 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.

🖶 Add New Record		- • •
🛛 🛷 OK 🛛 🔕 Cancel		
Officer Name	Call Sign	
Norton, John 🛛 🖶 🗙	130C	•
Assigned Date/Time		
19/05/2011 10:00 AM : 🎹 🗙	Abandoned	
Start Date/Time		
19/05/2011 10:00 AM : 🏢 🗙		
Arrived Date/Time		
19/05/2011 10:05 AM : 🏢 🗙	Response Time	0 hrs 5 mins
Cleared Date/Time		
19/05/2011 11:00 AM : 💷 🗙	Time On Site	0 hrs 55 mins
Officer Response Notes		
Conducted evacuation of staff from the	building.	A
		-

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

es Organization	Responses									
Edit Rem	ove									
Call Sign	Assigned	Date/Time	Start Date/	Time	Arrived Da	te/Time	Cleared Da	ate/Time	Response Time	Time On Site
130C	19/05/2011	10:00 AM	19/05/2011	10:	19/05/2011	10:05	19/05/2011	11:00	0.08 hrs	0.92 hrs
135A	19/05/2011	11:30 AM	19/05/2011	12:	19/05/2011	12:20	19/05/2011	12:50	0.17 hrs	0.5 hrs
ation of staff from th	ne building.									
	Call Sign Call Sign 130C 135A	Call Sign Assigned I 130C 19/05/2011 135A 19/05/2011 ation of staff from the building.	Call Sign Assigned Date/Time 130C 19/05/2011 135A 19/05/2011 135A 19/05/2011 11:30 AM	Corganization Responses Edit • Remove Call Sign Assigned Date/Time Start Date/ 130C 19/05/2011 10:00 AM 19/05/2011 135A 19/05/2011 11:30 AM 19/05/2011 ation of staff from the building. • Call Sign • Call Sign	Corganization Responses Edit Remove Call Sign Assigned Date/Time Start Date/Time 130C 19/05/2011 10:00 AM 19/05/2011 10: 135A 19/05/2011 11:30 AM 19/05/2011 12: ation of staff from the building. Staff from the building. Staff from the building. Staff from the building.	Corganization Responses Edit Responses Call Sign Assigned Date/Time Start Date/Time Arrived Date/Time 130C 19/05/2011 10:00 AM 19/05/2011 10: 19/05/2011 135A 19/05/2011 11:30 AM 19/05/2011 12 19/05/2011 ation of staff from the building. 19/05/2011 13/05/2011 13/05/2011 19/05/2011	Call Sign Assigned Date/Time Start Date/Time Arrived Date/Time 130C 19/05/2011 10:00 AM 19/05/2011 10:05.2011 10:05.2011 135A 19/05/2011 11:30 AM 19/05/2011 12:20 19/05/2011 12:20 ation of staff from the building. 19/05/2011 10:00 AM 19/05/2011 12:20	Corganization Responses Edit Remove Call Sign Assigned Date/Time Start Date/Time Arrived Date/Time Cleared Date/Time 130C 19/05/2011 10:00 AM 19/05/2011 10:-05_2011 10:05_2011 10:-05_2011 135A 19/05/2011 11:30 AM 19/05/2011 12:	Corganization Responses Edit Edit Classify Classify	Corganization Responses Edit • Call Sign Assigned Date/Time Start Date/Time Arrived Date/Time Cleared Date/Time Response Time 130C 19/05/2011 10:00 AM 19/05/2011 10: 19/05/2011 11:00 0.08 hrs 135A 19/05/2011 11:30 AM 19/05/2011 12: 19/05/2011 12:00 0.17 hrs

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**.
- 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.



 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.

♦ General ♦ F	Responses	Audit History							
Officer Responses Organization Responses									
= <u>Add New</u> = <u>Edit</u> = <u>Remove</u>									
Total: 2									
Organization Type	Organization Name Involvement Type Called Date/Time Arrived Date/Time Cleared Date	e/Time Response Time	Time On Site						
Municipal Agency	Public Security Ser Responding Serv 19/05/2011 10:1	0.0 hrs	0.0 hrs						
Municipal Agency	Metropolitan Fire a Responding Serv 19/05/2011 10:2 19/05/2011 10:30 19/05/2011	11:30 0.17 hrs	1.0 hrs						
Arrived at 10:30, chec	cked the building and left at 11:30.		~						
CB: removakova	a - 20/05/2011 11:39:58 AM - I M: removakova - 20/05/2011 11:39:58 AM		Ŧ						
	a - 20/03/2011 11.33.30 AMI - EM. reinnyakova - 20/03/2011 11.33.30 AMI								

Note an Action Request for an Activity

- 1. Select the **Requests** tab.
- 2. Select Add New. A pop-up window will open.
- 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**.
- If there is a tracking or other ID number assigned to the action request, enter it in the Tracking Number field.

	Organization Name	Involvement Type
🕰 Campus Security 🖷 👗	Window Glass Repair Service	Responding Service/Agency
	Organization Number	Organization Type
A	S-796-1	Corporation •
	Notified Type	Reference Number
	Dispatch 👻	4238-F
	Contact Person	Contact Phone
🐸 😣 🔤 🔤	🖾 O'Sullivan Flaine 🛛 🖨 🗙	780 555 7809
Window Repair 💌	🖾 Thiessen, Ryan 🛛 🖶 🗙	
Assigned Date/Time	Tracking Number	
20/05/2011 09:08 AM 📫 🥅 🗙	780 555 7805	
Completed Date/Time	,	
20/05/2011 10:00 AM		
·		
·		

- 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.

♦ General ♦ Re	 ♦ General ◆ Responses ♦ Involvements Attachments ◆ Links ◆ Controls Audit History 									
• Add New • Ed	it • <u>Remove</u>									
Total: 1										
Organization Type	Organization Name	Involvement Type	Request Type	Assigned Date/Time	Completed Date/Time	Request Assigned To Person	n			
Corporation	Window Glass Repair.	. Responding Servic	Window Repair	20/05/2011 9:08 AM	20/05/2011 10:00 AM	Thiessen, Ryan				
Design the first strength	10/05/2011	- la sur sur sur la la la la								
During the fire alarm eva	acuation 19/05/2011, an	unknown person broke t	ne secona lett windi	ow at the Front Entrance.			*			
							Ŧ			
🐧 CB: remnyakova -	20/05/2011 11:39:58 AN	1 - LM: remnyakova - 20/	/05/2011 11:39:58 /	AM						

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).
- Select the activity that you want to link to the open activity from the Linked to Activity pick list.
- 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.



 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.

♦ General ♦ Resp	oonses	s 🔶 Involveme	ents Attachments	♦ Links	♦ Controls	Audit History
Activity Links Inciden	t Links					
<u>Add New</u> = <u>Edit</u>	• <u>Remove</u> • <u>G</u>	<u>o to</u>				
Number of Linked Activi	ties: 2					
Linked From Activity	Linked To Activity	Link Type	Link Effective Date	Notes		
ACT-2011-000015	ACT-2011-000022	Identical	19/05/2011	Similar circum	istances. Requir	res investigation.
ACT-2011-000022	ACT-2011-000007	Identical	20/05/2011	The same acti	vity has been re	ported twice by different officers.
CB: remnvakova - 2	0/05/2011 4:05:32 PM	LM: remnvakova - 2	20/05/2011 4:05:32 P	м		

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.

♦ General ♦ F	Responses 🔷 Requests	 Involvement 	s Attachments	♦ Links	♦ Controls	Audit History
Activity Links Inc.	ident Links					
<u>Add New</u>	<u>Edit</u> • <u>Remove</u> • <u>Go</u>	<u>to</u>				
Number of Linked In	cidents: 2					
Linked To Incident	Link Type	Link Effective Date	Notes			
ADMI-2010-000102	Escalated to Investigation	27/05/2011	The activity has been	en escalated t	o an Incident rec	ord for further investigation.
ADMI-2010-000016	Common Location	21/05/2011	Both the activity and	d the linked in	ncident occurred	at the East Wing Front Entrance o
🌒 CB: remnyakova	a - 20/05/2011 4:38:55 PM -	LM: remnyakova - 20/	/05/2011 4:38:55 PM			

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.

♦ General ♦ Respor	nses 🔶 Rea	quests 🔶 Involve	ements Attac	hments 🔶 Links	♦ Controls	Audit History
Details Standard Opera	ating Procedures	Assignments				
☆ Controls						
Org Level 1	, All All All All All All All All All Al	AccessLevel				
	•	Level 4	•	Archive (Record is no	ot visible)	
Ora Level 2	4	Activity Status		Record Owners		
	-	Open - Report Requi	w her	B Removakova Sve	H 🖶 🗙	
	•	open - Report Requi	icu ·	Loc Menniyakova, ove		
Org Level 3	[Disposition				
	-	Under Investigation	-			
Org Level 4	t	expiry Date				
	- 2	20/05/2011	: 🎟 🗙			
-						
Workgroup Visibilities						

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 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.

tails Standard Operating Procedures Assignment	nts	
Security Activity: Facility Check		
Site:		
Acme University/Administration Building		
2-1	No mass notification has been sent	
Lategory:	Notification sent on (08/12/2011 8:17)	32 PM) View Email
Security Activity/Verification/Cneck/Facility Cneck		
rocedure Description: The routine facility check is performed at the end of ev	very working day, at 18:00, to confirm the integrity of the	system settings of computers on site.
The routine facility check is performed at the end of ev	ery working day, at 18:00, to confirm the integrity of the SOP Attachment(s):	system settings of computers on site. SOP Links(s):
SOP CheckList(s): Examine possible modifications made to the sy Examine possible modifications to data Examine the facility for possible external tools a Look for possible external tool output Review log files Check for systems possibly involved in intrusion	SOP Attachment(s):	system settings of computers on site. SOP Links(s): MIR3 inEnterprise Login Page SOP for Handling Security Incidents at Acme U

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 $rac{+}{+}$ 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**.

Laptop Corporate Property/Lap	op	0
ave 📝 Edit 🖶 Add 👻	Delete 🔓 Lock 🖶 Print 🐇 Merge Items 😧 Cancel	
General 🔶 History 🔶	Attachments 🔷 Controls Audit History	
	kem Name Laptop Serial Number XTP-400S Original Value \$2900.00 CDN	
Item Category	Item Make	
Corporate Property	▼ Dell ▼	
Item Type	Item Model	
Laptop	▼ Inspiron E1705	
 Owner Identified 		
Owner Name Organization	Owner Name Person	
Notes		
Located at the cubicle ADMIN-	G6.	

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 popup 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.

Rollup ITEMMAKEMODELROLLUP	S 🛛 🛛
Item Make Model Rollup Inspiron 710M Inspiron E1505 Inspiron E1705 XPS M140 XPS M170 HP	s 💽
⊕ Motorola ⊕ Nokia ⊕ Palm ⊕ Sony	
	Select Cancel

- 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** ⁽²⁾ 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** ^𝔅.

Import					
🛼 Import	🚯 Refresh				😣 Close
Gateway					
Field Name		Operator	Value		
Item Name	•	=	 Laptop 		And 💿 Or
Field Name		Operator	Value		
Item Make/M	odel 👻	=	- Dell		And 💿 Or 🛛 🔀
Select Top					
1000	A.				Start Search Stop Search
State	Submit ID	Record ID	Item Name	Item Make/Model	Notes
Added	Source System ID	78755343	Laptop Computer	Dell/Inspiron E1705	Item Notes
Added	Source System ID	78755342	Laptop	Dell/Inspiron 710M	
Available	Source System ID	101010101	Laptop	Dell/Inspiron E1505	
Available	Source System ID	5251122448	Laptop Computer	Dell/Inspiron E1705	
Available	Source System ID	5251122443	Laptop Computer	Dell/Inspiron E1705	
Available	Source System ID	5251122442	Laptop	Dell/Inspiron E1505	Item Notes
(6 of 6 Records)	1				
(* *** * /iecoros)					

View Record's Incident Involvements

- 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.

dd New Record ✔ OK 🚱 Cancel		×
Link Type Linked To Case Common Organization Link Effective Date 01/12/2010 Link Effective Type X	÷	
Notes Advanced Security Ltd., Human Resources	*	
	Ŧ	

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.

♦ General	♦ Histo	ary 🔷	Attachme	ents 🔶 Con	trols Aud	it History					
Add to Case	Add to Case = Go to										
Total: 8											
Incident Num	nber	Class	Category	Occurred From	n Date/Time	Site	IncidentStatus	LossStatus	Investigation Start Date		
ADMI-2010-00	00124 C	Criminal	Theft	22/11/2010	4:20 PM	Site A/Building 1/Location 1/Se	Open	Stolen	23/11/2010		
ADMI-2010-00	00125 C	Criminal	Break a	24/11/2010	10:12 AM	British Columbia/Salmon Arm	Open				
ADMI-2011-01-	-00006 C	Criminal	Theft	20/01/2011	12:00 PM	Acme University/Administration	Open				
INC-2009-00	0262 N	lon-C		13/10/2009	4:36 PM		Open	Damaged			

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.
- 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.
- 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.

General	 Attachr 	ments	Audit History	
etails				
Controls				
Org Level 1		Access LevelID		
North America	-	Level 3	 Archive (Record is not visible) 	
Org Level 2				
Canada	-			
Org Level 3				
Alberta	-			
Org Level 4				
Edmonton	-			
Workgroup Visibilities				

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.
- 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.

Workgroup	Update None	^
Workgroup A		
Workgroup B	V	
Workgroup C		V
🗤 Workgroup D	V	
Workgroup E		

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.

<u>ه</u>	General 🔶 History 🔶 Attachments	Controls Audit Histo	ory						
Deta	ails								
* C	Controls								
* V	Vorkgroup Visibilities								
	Owner Workgroup (Full Rights) All Other Workgroups								
	Advanced Users 👻	Read	-						
÷	Add Exception(s) Remove Morkaroun Update None								
We	orkgroup		Update	None					
We	orkgroup Workgroup A		Update	None					
We •	orkgroup Workgroup A Workgroup B		Update	None					
₩e	orkgroup Workgroup A Workgroup B Workgroup C		Update	None					
We	orkgroup Workgroup A Workgroup B Workgroup C Workgroup D		Update	None					

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**.

Howard, Katherine M DOB: 04/06/1983							Ø
🛃 Save 📝 Edit 🔮 Add 🔹 🕽	< Delete 🔒 Lo	ck 🖶 Print 🍶	Merge Persons	😧 Cancel			
General Contact(s)	🔶 Links 🔷 🔶	History Attach	ments 🔷 Co	ntrols Audit H	istory		
Additional Information Dublic & ADMIN-66.	Title R Miss V K Date of Bith 04/06/1983 Eye Color Grey	int Name iatherine : :::::::::::::::::::::::::::::::::::	Initial M Gender Female or e •	Last Name Howard Martal St Single Height W 5'05'	eight 135 lbs	Designation Ph. D.	

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.

Import		×					
🗄 Ķ Import 😰 Refres	h	😮 Close					
Active Directory Gatew	vay OutlookContacts						
Objects to query							
Object	Search						
Users 💌	Craig	Ed Find					
	Filter 💿 Any 🔘 Exa	uct					
Search Result							
Advanced Security Inc. B Craig Fisher Craig Freemark							
Craig Fisher Technical Support Analy	rst						

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	Add New Record				X
1	🖉 OK 🛛 🙆 Cancel				
	Festure Type		Location		
	Distinguishing Marks	-	Left side of forehead		
	Description				
	Birth mark			*	
				-	

4. Click **OK**.

♦ General	 Contact(s) 	Links	 History 	Attachments	 Controls 	Audit History	
Unique Feature	ures						
Add New	• <u>Edit</u> • <u>R</u>	emove					
Total: 2							
Feature Typ	e 🛆 Loo	ation	Description				
Distinguishing	Marks Left side	of forehead	Birth mark				
Tattoos	Left shou	lder :	Snake				
0							
Identification	s						
Trespass De	tails						
* Flags Details	5						

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.

🖶 Add New Record	
V OK 🛛 🔞 Cancel	
Identification Type Identification Number	
Driver's License T 1234566-789	
Issued By	
Alberta Motor Association	
Comments	
Class 5 operator's license	*
	-

5. Click OK.

♦ General ♦ Co	ntact(s) 🔶 Links	 History 	Attachments	 Controls 	Audit H	listory			
∜ Unique Features									
A Identifications									
= <u>Add New</u> = <u>Edit</u> = <u>Remove</u>									
Total: 2									
Identification Type	Identification Number		Issued	By		Comments			
Driver's License	1234566-789	Alberta Mot	or Association			Class 5 operator's license			
Birth Certificate	59-01-012345	Regina, Sa	skatchewan, Dep	artment of Public	Health	Birth date: March 27, 1980			
0									
Trespass Details									
✤ Flags Details									

Document the Person's Trespass Details

- 1. In the Trespass Details section, click **Add New** \clubsuit 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**.

Site		Expiry Date	
Site A	-	27/12/2011	: 🎟 🗙
Building			
Building 2	-	Notice Printed	
Location			
Location 1	-		
Section			
Section C	-		
Comments A copy of the Trespa Attachments.	ss Report for th	is property is enclosed i	in the

6. Click OK.

♦ General ♦ Contact(s) ♦ I	inks 🔷 🔶 History	Attachments	♦ Controls	Audit History
✤ Unique Features				
¥ Identifications				
☆ Trespass Details				
Add New Edit Edit Remove				
Total: 2				
Site Rollup	Expiry Date	Notice Printed	Comments	
Site A/Building 2/Location 1/Section C	27/12/2011		A copy of the Tres	pass Report for this property is enclosed in the Attachments.
Alberta/Edmonton				
0				
¥ Flags Details				

Flag the Person

- 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.

General	 Contact(s) 	♦ Links	 History 	Attachn	nents	♦ Co	ntrols	
Unique Fe	atures							
Identificati	ions							
Trespass	Details							
Flags Det	ails							
	Description			State	JS	Severi	ty	
۳	Wanted			Yes	•	Critical	-	^
۷ 🦋	Violent			No	Ŧ		Ŧ	Ε
🌾 Т	Trespasser			Yes	•	High	-	
1 🤟	Infectious			Unknown	-		-	-

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.

Add New Record		
🛛 🛷 OK 🛛 🔞 Cancel		
Address Type Home	✓ Primary Address?	
Address 1	Country	
671 Nicholas Street	Canada	•
Address 2	State\Province Alberta	•
ZIP / Postal Code A1B 2C3	City Edmonton	•

- 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.

Add New Record		
Phone Type Cell	Phone Number 17804344402	
	Primary Phone?	

- 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.

Add New Record			
🖉 🛷 OK 🛛 😢 Cancel			
Email Type Work	¥	Email Address kathy howard@mywork.ca Izi Primary Email?	

5. Add as many contact entries as you want.

🔷 General 🤇	Contact(s)	♦ Links ♦ History	Attachment	s 🔶 Controls Aud	dit History	
Address						
Add New	• <u>Edit</u> • <u>Re</u>	move				
Total: 1						
Primary Addres	s? Address 1	Type Address 1	Address 2	Geographic Rollup	ZIP / Postal Code	
$\overline{\mathbf{v}}$	Home	671 Nicholas Street	0	Canada/Alberta/Edmonton	A1B 2C3	
Phone Number	S					
Add New	Edit Re	move				
Total: 2						
Primary Phone?	Phone Type	Phone Number				
~	Home	17805550987				
Cell 17804344402						
Email Address						
Add New	• <u>Edit</u> • <u>Re</u>	move				
Total: 1						
Primary Email?	Email Type	Email Address				

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).
- 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.
- 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.

)K 🛛 😧 Cancel				
nk Type		Linked To Person		
artner	-	🖾 Brown, Jeff L	-	X
ak Effective From Date		Link Effective To Date		
2/07/2007	×		• 📷	X
otes				
Brown works at the same departm	nent as do	es Ms Howard.		*
				-

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.

♦ General ♦ Co	ntact(s) 🔶 Links	s 🔷 His	tory Attachments <	Controls Audit Hist	lory		
☆ Person Links	☆ Person Links						
= <u>Add New</u> = <u>Edit</u> = <u>Remove</u> = <u>Go to</u>							
Total: 2							
Linked From Person	Linked To Person	Link Type	Link Effective From Date	Link Effective To Date	Notes		
Howard, Katherine M	Brown, Jeff L	Partner	12/07/2007		Mr Brown works at the same department as does $\operatorname{Ms}_{\cdots}$		
Howard, Katherine M	Freemark, Craig G	Associate	05/10/2010	25/11/2010			
0							
Vorganization Links							
¥ Vehicle Links							

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.

d New Record				
VIK 🔯 Cancel				
Link Type Employer	•	Organization	. 🗳 🗙	
Link Effective From Date	: X	Link Effective To Date		
Notes				
Ms Howard has been employed Inc. since July 2007.	I as an Administ	rative Assistant at the Advanc	ed Security 🔺	

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.

Add New Record				
🖌 🗸 OK 🛛 😧 Cancel				
Link Type Driver	•	Vehicle	₽ ×	
Link Effective From Date 09/06/2009	: 🔳 🗙	Link Effective To Date	: 🔳 🗙	
Notes				
VIN: 4LUKPI22222M333333			*	
			Ŧ	

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.

♦ General ♦ Contact(s)	s) 🔷 Links	♦ History At	tachments 🔷 Cont	rols Audit History			
¥ Person Links							
V Organization Links							
☆ Vehicle Links	★ Vehicle Links						
= <u>Add New</u> = <u>Edit</u>	= <u>Add New</u> = <u>Edit</u> = <u>Remove</u> = <u>Go to</u>						
Total: 2							
Vehicle	Link Type Li	nk Effective From Dat	Link Effective To D	ate Notes			
PPP-616 - Honda/Odyssey	Passenger	06/02/2008	10/02/2009				
URV-345 - BMW/M3	Driver	09/06/2009		VIN: 4LUKPI22222M333333			

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**.

 General 	Contact(s) 🔶 Li	nks 🔶 History	Attachments	Controls Audit History
Details					
☆ Controls					
Org Level 1			Access Level		
North Ame	ica	+	Level 1 (Lowest)	+	Archive (Record is not visible)
Org Level 2			Employee Number		
Canada		-	ADMIN-5687		Employee
Org Level 3					
Alberta		*			
Org Level 4					
Edmonton		-			
* Workgroup	Visibilities				

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 $\stackrel{\bullet}{=}$ 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.
- If the organization has a Web site, specify the Web address under Organization Webpage URL. Clicking the adjacent Microsoft Internet Explorer[®] icon S 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**.
| Metropolitan Police Service
C-9870-D | 0 |
|---|---|
| 🛃 Save 📝 Edit 🖶 Add 👻 Dele | te 😭 Lock 🖶 Print 🖑 Merge Organizations 🚱 Cancel |
| ♦ General ♦ Contact(s) ♦ Li | nks 🔷 History 🔶 Attachments 🔶 Controls Audit History |
| Metropolitan | Organization Name Metropolitan Police Service Organization Number C-9870-D Organization Type Municipal Agency Organization Webpage URL www.metropolitanps.com |
| Notes
Est 1955 | |
| 24. 1000. | T T |

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 rightarrow on the Viewing pane toolbar.
- 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 G in the image box. Locate the image file in the browser window and click **Open**.

URV-345 BMW/M3			Û
🛃 Save 📝 Edit 🖶 Add 👻 Dele	tte 🔒 Lock 🖶 Print 🚐 Merge	Vehicles <mark>ல் Cancel</mark>	
♦ General ♦ Links ♦ History	Attachments	Audit History	
	License Plate URV-345 VIN 4LUKPI22222M333333 Vehicle Value \$103,250.00 USD	License Plate Registered In Country Canada State\Province Alberta Year 2007 :	
Make	Style	Division	
BMW 👻	2 Door 💌	Security -	
Model	Color	Branch	
M3 👻	Green 💌	Operations	
Comments Bought in 2010.		* *	

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.

♦ General Li Details	nks History	Attachments	Audit History	
☆ Controls				
Org Level 1		Access Level	- Archive (Record is not visible)	
Org Level 2	•	Level 4	Archive (Necora is not Visible) Company Vehicle	
UK Org Level 3	•			
England Org Level 4	•			
	*			
¥ Workgroup Vis	ibilities			

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.

 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.

uick Merge Items				
Primary Rec	cord Computer 🕂 🔭 🗙	Secondary Record	₽ ×	
		\bigcirc	tem Photo	
Item Name	Laptop Computer	Item Name	Laptop	5
Serial Number	XTP-400S	Serial Number	XTP-400S	5
Original Value	2135.00	Original Value		
Item Class Rollup	Corporate Property/Laptop	Item Class Rollup		
Item Make Model Rollup	Dell	Item Make Model Rollup	Dell/Inspiron E1705	5
Owner Identified	Yes	Owner Identified	Yes	5
Owner Name Organization		Owner Name Organization	Sydney Police Service	5
Owner Name Person	Zeyen, Jeff	Owner Name Person	Woods, Victoria	5
Notes		Notes Bought in 2010		1.0
	*			
User Defined Fields		User Defined Fields		1
Field Name	Field Value	Field Name	Field Value Keep Value?	
Expected Return \$		Expected Return \$	300.00	
Company Id Tag		Company Id Tag	487WF	
			Select/Deselect A	
			Cancei Merg	ye

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.

📄 Laptop Computer			
(0) Corporate Property/Laptop	Dell	🗇 Laptop	
🔒 Laptop		(0) Corporate Property/Laptop Dell/Inspire	on E1705
(0)	Dell/Inspiron E1705		

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;
- 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 **a** 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.

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 landscapeformat 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.

eport Settings			
Refresh Refresh Preview PDF	• 🐻 Open Local		
Parameters Criteria			
earchable Helds	All Workgr	oups for Lookups and Rollups	
Organizational Pollume	Archive (Record is not visit		
Case Mananer	Case Category		
Case Supervisor	Case Closed D Search By		
H-Case->Case Links	Case Description	Field Name Opt Value	
Case<-Case Links	Case Name	· · · · · · · · · · · · · · · · · · ·	
Case Assignments	Case Number	Enter Undate Remov	10
Case Investigators	Case Start Date		10
Case Reviews	Created By Date/Time	Symt Field Name Operator Field Value	8
Case Narratives	Created By User ID		_
Case Attachments	Disposition		
Case Investigation Evidence	- Duration =		
Case Investigation Log	Last Modified By Date/Tin		
Case Investigation Interviews	- Last Modified By User ID		
- Case Executive View Total L	- Last Reviewed Date		
Case Items	- Location Details		
Case Visibility	Lock Record		
Case-Incident Links	- Locked By		
	- Sign Off Date		
	Sign Off Person Id Tag		
	Status		
	Millardo I rus		

- 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 \clubsuit .

	Field Name Case Catego	bry	Opt EQUAL	•	Value Internal	÷
*		Enter	Update		Remove	
	Symbol	Field Name	Operator		Field Value	

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.

A		Field Name Item Category		Opt EQU/	AL 👻	Valu Com	e orate Property F	-
C.		E	inter		Update		Remove	
	×	Symbol	Field Name		Operator		Field Value	
		Α	Case Category		EQUAL		Internal	
		В	Case Closed Da	ite	>=		February-01-09	
		С	Item Category		EQUAL		Corporate Property	
((AORBORC))(EQUAL Corporate Prop	(Ca berty	ase Category EG)))	UAL Internal OR	Case C	Closed Date >= Februa	ary-01	-09 OR Item Categor	y 🔺
								-

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 E 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. Click **OK**.

Subreport	Visible
Cover Page	V
ncident Detail	V
ncident Flags	V
ncident Persons	V
ncident Organizations	V
ncident Items	V
ncident Narratives	V
ncident Attachments	V
ncident Reviews	V
ncident Assignments	V
	· · · · · · · · · · · · · · · · · · ·

- 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.

🛄 Report	Options 🗾
The Repor What woul	t is available for viewing. d you like to do with this report?
2	Open Open this report with PDF viewer.
	Send Send Report as Attachment
	Save Save Report as PDF
	Close
	Take No Action With This Report
Created :	Mar-19-2013 5:01 PM

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 upto-date data available in Perspective. The Open Local button should only be used to quickly reference recently run 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 in 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 a query, clone, share, remove, rename, execute it, and edit its description by right-clicking the corresponding record category (e.g., Incident) or an existing query entry (e.g., Open Incidents) and selecting the relevant option in the menu.

- 2. Navigation pane: Arranges queries that you create according to their access options (i.e., Shared Queries or Private Queries) and the various record entities (i.e., Case, Incident, Item, Activity, Organization, Person, and Vehicle). 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 entity selected in the Navigation 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.
- 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.

Query Design Process

Create a Query

- 1. To start a new query, choose one of the three options:
 - Click Add 🔂 on the Ribbon.
 - Right-click the **Private Queries** node and the Navigation pane and select **Add New Query**.
 - Expand Private Queries; right-click the record entity you want to search in the Navigation pane (e.g., Case, Person) and select the appropriate **Add Query** option (e.g., Add Case Query, Add Person Query).
- 2. A Create New Query dialog box will open. From the **Type** lookup list, choose the record entity you would like Analysis Expert to search (e.g., Incident, Person).
- 3. 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 at [current date] [current time]>, e.g., <New Query at 15/12/2011 2:23:42 PM>.
- 4. In the **Description** text box, identify the type of query and/or its purpose.

туре	
Incident	•
Name	
<my incident="" query=""></my>	
Description	
Use this query to view in Category and Site.	cident Status, Access Level, Class,

- 5. Click Add.
- 6. 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 \times 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.

 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.

Field(s)			
:	ber		*
File Number		[
E Reported Date	e/Time		
···· 🔽 Year			
🔲 Quar 🌽	Search By 📐		
··· Mont	Group By		
···· 🖸 Wee			
···· 📃 Day	Cancel		
Weekuay			
Dayof Yea	r		
Hour			
Minute			Ŧ

The selected field will now appear in the Criteria Designer pane below.

Crite	eria Desig		× 🛧 -		
	Symbol	Form	Field	Operator	Value
•	A	Incident Detail	Year	=	
•	A	Incident Detail	Year	=	

- 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.

Crit	eria Desig	iner			× 🖈	4
	Symbol	Form	Field	Operator	Value	
	A	Incident Detail	Year	>=	2007	
•	B	Incident Loss	Net Loss	·	• 0.50	
				>=		
				< 65°		
				0		
(AAI	ND B)					

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.

Crite	ria Proper	ties Audit				
Crit	eria Desig	ner			>	< 🛧 🦊
	Symbol	Form	Field	Operator	Value	
	A	Incident Detail	Year	>=	2007	
	8	Incident Loss	Net Loss	>=	0.50	
	С	Incident Detail	Reported to Supervisor	=	YES	-
Þ	D	Incident Detail	Reported to Division		YES	-
((AA	ND B) AND	(CORD))				

- 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

- To view a query's specifications, select the query from the tree on the Navigation pane. Its Form(s), Field(s), Selection(s), and Criteria will be displayed in the corresponding panes. Review the information and make changes to the selected checkboxes, if necessary.
- To rename a query, right-click the query entry and select **Rename**. Type the new name directly into the currently open query's name field and press Enter.



To edit the text of a query's description, right-click the query entry and select Edit
 Description. A pop-up window will open that contains the text of the current description.
 Make the necessary changes and click Save.

Fdit/View Current Query Description	×
Description:	
Use this query to view incident Status, Access Level, Class, Category and Site.	
Save	Cancel

Clone a query

- 1. Select the name of the query you want to clone from the query list in the Navigation pane.
- 2. Click Clone on the Ribbon. The cloned query will appear at the top of the query list with the original name followed by the date and time the clone was made.
- 3. If required, rename the cloned query and make desired modifications to the query criteria. Click **Save**.



Share a query

- 1. Select the name of the query you want to share with other Analysis Expert users in your organization from the query list in the Navigation pane.
- 2. Click Share on the Ribbon. The query will move to the Shared Queries folder in the query list.

Delete a query

- 1. Select the name of the query you want to delete from the query list in the Navigation pane.
- 2. Click **Delete** on the Ribbon.
- 3. Click **Yes** on the confirmation dialog box that opens.

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 Navigation pane.
- 2. Click **Execute** on the Ribbon. A new window will open with the results of the query displayed in the form of a grid.
- 3. 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.

Criteria Properties Au	dit				
Last Run By User Clint	Last Run Time 23/02/2011 7:55:35 AM	Last Run Returned Rows 2	Last Run Duration (second) 0		
Where Clause SELECT ID_PK FROM dbo f FROM tblPerson Trespasses &	cntblPersonsSecuredByUser("0 EPersonTrespass" WHERE (C	a0e4c81-7b70-4261-9ff6-0ab2c onvert(varchar(10),ExpiryDate_	e47578c) AEPersons WHERE DT, 111) = '2011/02/23)))	((ID_PK IN (SELECT PersonID_FK	*
SQL Statement SELECT AEPerson Detail ID LastName] FROM dbo fontblf (d 2abbf2-9684-45c4-84 ac ID AEPerson Trespass Person ID C	PK AS ID AEPerson Detail ID P ersons Secured By User (DaDe 46 10656-64716) . (dr2abbr2968 ID PK AS Tink ID CONVERT (V	K AS PersonID AEPersonDetai 81-75 70 4261 9ff6 0ab 2ce 475 4 45c4 847a - 1055bcb 4716) ARCHAR(25) AEPerson Trespa	First Name_NV AS [FName].AE X8C) AEPerson Detail WHERE SELECT AEPerson Trespass II ss Expiry Date DT (26) AS [Exp 2000/01/2010 100000000000000000000000000	PersonDetail LastName_NV AS [JD AEPersonDetail ID_PK IN ()_PK AS iny Date] FROM tblPerson Trespasses	*

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.

Wew Query at 9/5/2013 1:38:20 PM>	> Cloned at 9/5/2013 1:39:08 PM Executed at 9/5/2013 1:42:52 PM	
🗄 📧 Export 🚔 Print Grid 🔣 View Deta	iail 🔟 View in Visual Analysis 🛛 Incident Detail 💦 🔹 Chart 🛛 🚔 Print Detail Report	
View Style	Records Found (72)	
Show Child Record		
 Horizontal 	Drag a column here to group by that column.	
Vertical	Incident Detail	-
Outlook Group By	Incident Number Reported Date/Time Involved Person.Access Level Involved Person.Title Involved Person.First Name Involved Person	on.Initi
	INKP-2013-08-00 2013-08-14 11:53	
Expand All	IRC1-2013-03-00 2013-03-28 09:12	=
Card May	IRC1-2013-03-00 2013-03-28 09:12	
	IRC1-2013-03-00 2013-03-28 09:12	
	IRC1-2013-03-00 2013-03-28 09:26 Level 3 Test	
Text Search	IRC1-2013-03-00 2013-03-28 09:26	
	IRC1-2013-03-00 2013-03-28 09:26	
Backcolor of Search Besuite	IRC1-2013-03-00 2013-03-28 09:26	
Include Child Record	IRC1-2013-03-00 2013-03-18 14:55	
Exact Match of Text	INC-2013-04-000 2013-04-04 08:47	
	INCP-2013-06-00 2013-06-26 09:03	
	IRC1-2013-03-00 2013-03-28 09:02	
Search Grid	IRC1-2013-03-00 2013-03-28 09:02	
	IRC1-2013-03-00 2013-03-28 09:02	
	IRC1-2013-03-00 2013-03-18 14:55	
	IRC1-2013-03-00 2013-03-18 14:55	
	IRC1-2013-03-00 2013-03-19 09:53 Level 5 (Highest) Ryan	
	INC-2013-04-000 2013-04-04 11:57	
	IRC1-2013-03-00 2013-03-26 16:20	
	INC-2013-04-000 2013-04-04 11:58 Level 5 (Highest) Test	
	INC-2013-04-000 2013-04-04 11:57	
	LLRI-2013-03-00 2013-03-24 12:34	-
	<	P .
Number of Records Returned 72		
		.::

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.

Sector State And Annual State And Annual State Annual	d at 20)/12/2010 10:57:02 A	M				_ 8	×
🗄 🖼 Export 🚔 Print Grid 🔣 View Deta	il 🖄	View in Visual Anal	ysis Inc	ident Detail 🔹 🔹 🚯 Chart	📄 Print Detai	l Report		
View Style	Rec	ords Found (56)						
Show Child Record		Incident Detail						
Horizontal		Incident Number	Year	∑ Class Rollups.Category	Site Rollups.Sit	Incident Loss.Total L	Σ Incident Loss.Net Lo Σ	
 Vertical 		INC-2009-000252	2009			221	2211	
Outlook Group By		ADMI-2010-00011	2010			300	00 3000	
		INCD000000182	2008	ACCIDENTS	Manitoba	453	32 4442	
Collapse All		INCD000000185	2008	Emergency Situation	Site B	5437724.6	5437594.63	
Card View		Incident Investi	gators					
<none> 👻</none>		Assigned Date		Completed Date		Investigator.Last Name		
		06/04/2006				Adams		
Text Search		17/03/2009		17/03/2009		Johanssen		
2009		Incident Detail						
Backcolor of Search Results		Incident Number	Year	∑ Class Rollups.Category	Site Rollups.Sit	Incident Loss.Total L	Σ Incident Loss.Net Lo Σ	
Include Child Record		INCD000000186	2008	Security & Safety Syste	Site A	95	50 160	
Exact Match of Text	1	Incident Investi	gators					
Case Sensitive		Assigned Date		Completed Date		Investigator.Last Name		
Search Grid		24/02/2009		25/02/2009		Adams		-
Number of returned records: 56								:

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.

1	Records F	ound (32)				1	Records Found (32)
	Year _o 🖓	coΣmn head	er here to group by that col	umn.			Year /
1	incident	Detail					
	Year	S COUNT_	Σ Class Rollups.Category	Site Roll	\rightarrow		
	2007	1	ACCIDENTS	Site B			
	2007	2	Assault	Site A			Year : 2010 (2 items)
	2007	1	Emergency Situation	Site B			

- 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

- 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.)
- 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.

R	ecor	ds Found (32)				
	Y	ear / Site Rollups.Site	×			
E	∃ Ye	ar : 2007 (4 items) COUNT	Incident Number Sum = 16, SU	JM_Incident Loss.Total Loss Average	e = 175396.3627272727272727272727	273, SUM_Inciden
	-	Site Rollups.Site : Site A (4	items) COUNT_Incident Numb	er Sum = 7, SUM_Incident Loss.Total	Loss Average = 466378.75, SUM_I	ncident Loss.Net
		Incident Detail				
		COUNT_Incident Number	Class Rollups.Category	SUM_Incident Loss.Total Loss 2	SUM_Incident Loss.Net Loss 2	GROUPED_BY
		2	Assault	1823625	1818171	2007/Assault/Site
		3	Fire	28440	19500	2007/Fire/Site A
		1	Security & Safety Observ	450	450	2007/Security &
		1	Theft	13000	5000	2007/Theft/Site A
		Summaries for Site A				
		Sum = 7		Average = 466378.75	Average = 460780.25	
				Sum = 1865515.00	Sum = 1843121.00	
		Site Rollups.Site : Site B (4	items) COUNT_Incident Numb	er Sum = 5, SUM_Incident Loss.Total	Loss Average = 12287.50, SUM_In	cident Loss.Net L
		Incident Detail				
		COUNT_Incident Number	Class Rollups.Category	SUM_Incident Loss.Total Loss	SUM_Incident Loss.Net Loss 2	GROUPED_BY
		1	ACCIDENTS	19000	19000	2007/ACCIDENT
		1	Emergency Situation	50	50	2007/Emergency
		2	Fire	30000	25000	2007/Fire/Site B
		1	Theft	100	100	2007/Theft/Site B
		Summaries for Site B				
		Sum = 5		Average = 12287.50	Average = 11037.50	
				Sum = 49150.00	Sum = 44150.00	
	+	Site Rollups.Site : Site C (1	item) COUNT_Incident Numbe	r Sum = 2, SUM_Incident Loss.Total I	Loss Average = 13099.00, SUM_Inc	ident Loss.Net Lo
	+	Site Rollups.Site : Site D (2	items) COUNT_Incident Numb	er Sum = 2, SUM_Incident Loss.Total	Loss Average = 797.995, SUM_Inc	ident Loss.Net Lo
G	E Ye	ar : 2008 (6 items) COUNT	Incident Number Sum = 13, SU	JM_Incident Loss.Total Loss Average	e = 498942.0572727272727272727272	727, SUM_Inciden
E	E Ye	ar : 2009 (6 items) COUNT_	Incident Number Sum = 18, SU	M_Incident Loss.Total Loss Average	= 162944.625, SUM_Incident Loss.I	Net Loss Average
E	B Ye	ar : 2010 (2 items) COUNT_	Incident Number Sum = 9, SUN	/_Incident Loss.Total Loss Average =	515642.45, SUM_Incident Loss.Ne	t Loss Average =

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.

🖳 Print preview	
🚳 🔎 🕶 🖬 📟 🛛 Close	Page 1

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 k 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 i Print Detail Report.
- 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.

Subreport	Visible
Cover Page	
ncident Detail	V
ncident Flags	V
ncident Persons	
ncident Organizations	
ncident Items	
ncident Narratives	
ncident Attachments	
ncident Reviews	V
ncident Assignments	V

- 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 **Wiew 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.

😵 Perspective Visual Analysis				
🔁 🖧 🗋 🗙 🤊 l ≽	- l က 😪 l 🖂 🖳 🕯	🔬 🗛 - +		12 💼 ^
INC-2009-000212	INC-2009-000029	ADMI-2010-000067		
ccwi-2011-02-00026	INCD000000103	LUIX-000000088	INC-2009-000022	
INC-2009-000095	CCWI-2011-02-00066	ADMI-2011-01-00012	INC-2009-000261	•
L			Do more with t	<u>nis chart</u> ∫ ∓

Chart query results

- 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 **III** 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** e 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.

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.

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Main				
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Eila Toppla Logoff Satting	r Ouick Halp			
*	Find -			
Settings				
🗍 All (10)	Incidents	4		
	ERPT-2007-02-00002	×	12	
Al Workgroups[9]	(1) Policy Violation	eReporting ^	🔛 Save 🖉 Edit 🌩 Assign 🌐 Delete 🥝 Accept 🔥 Pending 🤤 Reject 💿 Cancel	
: Central (0)	ERPT-2007-08-00001	-0	General Involvements Narratives Attachments Controls	
Doons (9)	(1) Foncy Violation/Parking Foncy	exeporting	* Information	<u>^</u>
EastCoast [0]	(1) Policy Violation	eReporting	Reported By	
(] Eastern (0)	ERPT-2007-08-00003		Name Subari ID	
Assigned[0]	(1) Non-Criminal	eReporting		
Accepted [1]	ERPT-2007-11-00001	aPaporting	Phone Email	
A Pending[0]	FRPT-2007-11-00002	exeporting		E
C Rejected [0]	(1) Criminal/Fire/Arson/Major	eReporting	Reviews	
	GrpA-2008-02-00001			
Incidents	(1) Criminal/Assault/No Injury	Sample Gatewa		
Items	GrpA-2008-02-00002			
Persons (1)	(1) Criminal/Theft	Sample Gatewa		
Organizations	GrpA-2011-09-00001			
Vehicles	(1) Procedural	PPMWindWate		
	(
Dashboard	(2)	☆ Details	
DispatchLog				
<u> </u>			Record Information	
Data Forms			eIncident Number Reported Date/Time	
Reports				
			Perspective Incident Number Occurred From Date/Time	
Analysis Expert			Fig. Mumber Occurred To Date/Time Insident Duration	
🛃 Gateway				
Administration			Class Site Level 1	
»		*		
•		x	Category Building Level 2	•
carlosa RPM Role Record loaded su	uccessfully.			Ready \varTheta Connected

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.

Field Name Class	•	Operato Not Equ	al Non-0	Criminal		@ And	© Or
Field Name elncident Number	•	Operato Begins V	ors With			And	🔿 Or 🗙
Field Name Occurred From Date	e∕Time ▼	Operato Before	vrs • 10/01	/2011 : 🎟 🕻	×	⊚ And	🔿 Or 🔀
Top: 1000						Start Sea	rch Stop Searc
Top: 1000 elncident Number	Reported	Occurred	Class Rollup	Site Rollup	State	Start Sear	ch Stop Searc
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Top: 1000 elncident Number GrpA-2009-10-00007 GrpA-2009-10-00008	Reported 27/10/2009 27/10/2009	Occurred 27/10/2009 27/10/2009	Class Rollup Procedural/Emergency Procedural/Emergency	Site Rollup Site A/Building 2/Locati. New Brunswick/Saint J_	State New New	Start Sear Submit ID eReporting eReporting	ch Stop Search attachment / 1 1
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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 reassigned 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.
2	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.
8	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. <i>Note: The</i> Gateway Approver's access rights <i>must match those designated</i> <i>under the e-Incident's Controls tab</i> .
Î	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. <i>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.</i>

Functions available for Gateway Approver only:

0	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 <i>new</i> 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
•	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.
Â	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.

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OK Cancel		
Involved Vehicle Link	License Plate	Involvement Type
	Dispection	Indirectly involved
	Make	Style
	Model	Vehicle Color
	▼	
🔂 😣 🛛 🖳	VIN	Vehicle Value
Company Vehicle		\$0.00 USD
License Plate Registered In	Driver Identified	
Country	Driver - Full Name	Driver ID
State /Province	John Smith	
Commonto		

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.
â 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.

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Start	Schedu) 🔇	ons	- <mark>8</mark> 9 ¹). 	- ¢	φφ.		Â	Ø		3	Hig	hlight	Ó) 🚦				-		ω 😗
Start	Close O Activity Du	n Off ty Duty	Dispatch Officer	Dispatch Organization	Arrive A	Arrive Cl All	lear Clear All	Activity Details	Officer Log	Attachment	SOP	Refres	h Y rito	er	Locatio	on Statu:	s Mai	I CallSign 1	Workgroups Filter	Activity Notes		
Activities	Dispateri				Actions					Reco	u							LOG				
SOP?	Activ	ity Number		Priority 7	Officer Sta	atus 🗸	RTA Alert	Rer	lime naining	Call	Catego	ry	V		Locat	ion	V	Off Site	Reported	Date/Tin	ie	Organization 7 Status 7
	CEN-2	11-10-000	08	Low	Waitir	ng	~				Alarm			As	sis Conve	ntion Cente	er		07/	.0/2011		
	CEN-2	11-10-000	07	High	Waitir	ng	2				Alarm			As	sis Conve	ntion Cente	er		07/	.0/2011		
	CEN-2	11-10-000	06	Low	Waitir	ng	<u> </u>	/		Security Direct	ted Acti	vity/Fa	acility		Central	Campus			07/	.0/2011		
	CEN-2	11-10-000	03	Low	On Sce	ene				General A	ssistan	ce/Assi	ist	Central	Campus/	Building 2 ·	🕕		07/	.0/2011		
	CEN-2	11-10-000	02	Low	Waitir	ng				Security Direct	ted Acti	vity/Fa	acility	Centr	ral Campu	s/Building	1		07/	.0/2011		
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E	Time ⊽ lapsed ▽	Team ♥	Call Sign	∀ Officer/Or Na	ganization ime	Sta	itus 🗸		Location	V		V	Time Elapsed	71	「eam ▽	Call Sign	v offi	icer/Organiza Name	tion ₇	Status	7	Activity Numb
8	3d 23h	P2	S12	Hoyt, Craig		Availa	able	0				8	3d 22h	P	2	130B	Geo	orge, Sarah	0	Scene		CEN-2011-10-00h
8	3d 21h	P4	C300	Rosenburg,	Brian	Lunci	h - 30	3				8	3d 22h	P	2	143B	Ho	lland, Max	4 0	Route		CEN-2011-10-00
8	3d 23h	P4	C322	Shantz, Gre	99	Availa	able	C				8	3d 22h	P	2	177B	Due	orov, Alex	01	Route		CEN-2011-09-00
8	3d 23h	P4	C325	Kennedy, Fr	ank Jr.	Availa	able					8	3d 22h	P	2	137B	Ow	ens, Derek	0	Scene		CEN-2011-10-00
8	3d 22h	P4	C330	Rutherford,	Justin	Out o	f Service				-											
9:1	4 AM												5	data	. cent	er. Pr	iori	ty 1-HIG	H respo	nse red	quir	ed.

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.

Start	Schedule	Optio	ns						Perspective Dispatch	log							
ResetView	v Cone Activities	Clone Resource	s														
Activities			-														
SOP7	Activity	umber		Priority V	7 Office	r Status 🗸	RTA Alert	Time Remaining	C. mite	igory V		Location	8	Off Site	Reported Date/Time	Organization Status	v
E	CEN-2011-	10-00007	,	High	v	Valting			Ala	rm	Asis	Convention Center		Г	07/10/2011		_
E	CEN-2011-	10-00006	5		v	Valting			Security Directed Activity/Facility.		c	entral Campus		E .	07/10/2011		
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V	CEN-2011-	10-00004	۰ 📒	Medium	01	Route	0 %	- 3d 22h	Alarm/Dur	ess\Panic	Central Car	mpus/Building 1	. @	E	07/10/2011		Pa
E S	CEN-2011-	10-00003	3	Low	Or	1 Scene			General Assis	tance/Assist	Central Ca	mpus/Building 2	Ð	E.	07/10/2011		En
-	CEN-2011-	10-00003	, 🗍	1 nw	N N	Veiting			Security Directed	Artivity/Facility	Central C	amous/Buildion 1		E	07/10/2011		н
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					8 8 8	Time Elapsed 3d 23h 3d 21h 3d 23h	▼ Team ▼ P2 P4 P4	Call ▼ Off Sign ▼ 01 S12 Ho C300 Ros C322 Sha	t, Craig enburg, Brian	Status V Available Lunch - 30 Available	7	Location					
					8	3d 23b	P4	C325 Ker	nedy, Frank	Available							
9.26 A	ым				8	3 d 23h 3 d 22h	P4	C330 Rub 1358 Fau	is the data	Out of Service Center. T P-STP	riority	1-HIGH CO	spo	nse requ	dred.		
					8	3d 23h	P4	C328 Mai	Millan, Dave	Out of Service							
					-0					10000		100					

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].

Avai	lable					
Δ.	Team 🛛	Call Sign 🛛	Officer/Organization Name	Status 🗸	Location V	Time Elapsed ♥
8	P1	132A	Dolby, John	[Clear]	Site C	23:35:27
8	P1	133A	Owens, Derek	Busy Busy	Site C	1d Oh
8	P2	130B	Holland, Mary	Out of Service T-STP	Ontario	1d 12h
8	P1	133B	George, Sara	Available	Site C	23:35:23
8	P3	130A	Shantz, Gregg	T-STP		22:14:27
8	P3	133C	Zeyen, Jeff	Busy	Site C/Building 1	22:08:35
8	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).

Avai	lable					
	Team 🛛	Call Sign 🛛	Officer/Organization Name	Status 47	Location V	Time Elapsed ♥
8	P1	132A	Dolby, John	Available	Site C	23:38:51
8	P1	133A	Owens, Derek	Available	Site C	1d 0h
8	P1	133B	George, Sara	Available	Site C	23:38:47
8	P3	130C	Bruce, Tom	Available	Site C	23:38:46
8	P3	133C	Zeyen, Jeff	Busy	Site C/Building 1	22:11:59
8	P2	130B	Holland, Mary	Out of Service	Ontario	1d 12h
8	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 \bigcirc located on the top toolbar. To turn on the automatic refresh option, click on the small arrow attached to the icon and select the interval of auto-refresh (i.e., refresh every one, five, or ten minutes). Note that the auto-refresh setting will only be valid for the current working session, and will not be saved upon logoff.

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.

lcon	Program Command	Selected Entity	Shortcut Key(s)
*	Start a new activity	Activity	<ctrl> + <s></s></ctrl>
V	Email a basic Activity record	Activity	<ctrl> + <m></m></ctrl>
¥	Display activity details	Activity	<f6></f6>
8 5	Dispatch an organization	Activity	<ctrl> + </ctrl>
	Update all officers' and organizations' statuses to "On Scene" for the selected activity	Activity	<ctrl> + <a></ctrl>
Ċ	Add activity notes	Activity	<ctrl> + <n></n></ctrl>
٦	Add an attachment to the selected activity	Activity	<ctrl> + <t></t></ctrl>
	Display the associated Standard Operation Procedures	Activity	<ctrl> + <p></p></ctrl>
T	Display assigned officers/organizations for the selected activity only	Activity	<ctrl> + <f></f></ctrl>
1	Highlight assigned officers/organizations for the selected activity only	Activity	<ctrl> + <h></h></ctrl>

S	Display activities filtered by specific workgroup(s)	—	<ctrl> + <w></w></ctrl>
	Clear all officers and organizations from the selected activity	Activity	<ctrl> + <l></l></ctrl>
8	Close an activity	Activity	<ctrl> + <o></o></ctrl>
Ø	Bring an officer on duty	_	<f8></f8>
3	Dispatch an officer	Available Officer	<ctrl> + <d></d></ctrl>
٩	Update an officer's Call Sign	Officer	<ctrl> + <e></e></ctrl>
0	Update an officer's/organization's Location	Officer/Organization	<ctrl> + <l></l></ctrl>
, T	Update an officer's/organization's Status	Officer/Organization	<ctrl> + <k></k></ctrl>
≝ ∳-	Update an officer's/organization's Status to "On Scene"	"On Route" Officer/Organization	<f2></f2>
-¢ <mark>-</mark>	Clear an officer/organization from the selected activity	Officer/Organization	<f3></f3>
0	Bring an officer off duty	Available Officer	<f9></f9>
<u>i</u>	Display officer log	Officer/—	<f7></f7>
Ø	Refresh the screens	_	<f5></f5>
	Delete an activity	(Scheduled) Activity	<f11></f11>
•	Add a new scheduled activity	_	<ctrl> + <1></ctrl>
	Edit a scheduled activity	Scheduled Activity	<ctrl> + <2></ctrl>
i	Delete a scheduled activity	Scheduled Activity	<f11> <ctrl> + <3></ctrl></f11>
	Copy a scheduled activity	Scheduled Activity	<ctrl> + <4></ctrl>
O	Transfer a scheduled activity to the current activities list under the Start tab	Scheduled Activity	<ctrl> + <s></s></ctrl>
	Reset the current panels' layout to default	_	<ctrl> + <r></r></ctrl>
	Clone activities for a separate window display and filtering		<ctrl> + <x></x></ctrl>

83	Clone resources for a separate window display and filtering	_	<ctrl> + <u></u></ctrl>

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 ³⁶ 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".

Activity Details			Supplemental Details
oorted Date/Time	Code Level 1	Priority	Call Source
09/2011 12:43 PM 🛛 📫 📉 🗙	900B Alarm	✓ Important	Alarm
	Level 2		Initiated By
Future dates will display only	Fire	•	🖾 Zeyen, Jeff 🛛 📫 🗙
 In Scheduled Activities. 	l evel 3		Contact Number
	Local Alarm	-	780 555 4444
			Coll Tolson Du
			Call Taken By
Activity Location			aug St. Bean, Chint
			Dispatched By
Site	Address	Country	🖾 Remnyakova, Svet 👘 🗡
Acme University 💌	1112 University Drive	Canada	
Building	Address 2	State\Province	
Administration Building 🔹	Administration Building	Alberta	-
Location	Postal Code	City	Wadamaa Mathiliataa
-	T1A 2B3	Edmonton	workgroup visibilities
Section			Owner Workgroup
~	Off Site		Advanced Users
			All Workgroups
			Update
lescription			
escription he fire alarm sounded at 9:58 am. Mos	t staff evacuated the building by 10:20 am.		Opuale

- 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.

Activities												
Activity Number	Priority	Officer Status	RTA	Alert	Time Remaining	Call Category	Location	Off Site	Reported Date/	Organization Status	Description	
ACT1-2011-00010:	Low	Waiting				General	Site C/Building 1		01/09/2011) with arrest of	
ACT1-2011-08-0001	Extreme	Waiting				Dangerous Condit	British Columbia		31/08/2011			
ACT1-2011-08-0001	Minimual	On Scene				Alarm	British Columbia		31/08/2011	On Route		=
ACT1-2011-08-000(Important	On Route	1	57 %	00:00:30	Emergency Call/91	Alberta		31/08/2011			
ACT1-2011-08-000(Minimual	Waiting	-			Escort	Alberta		31/08/2011			
ACT1-2011-00010	Minimual	On Scene				Security	Site D/Building 1		31/08/2011		ending Toronto I	
ACT-2011-000020	High	On Route				Alarm/Panic	Site A		12/08/2011	On Route		-
											- / -	
					RTA Alert	Time Rem	aining					
					_							
					41 %	00:00:	17					
					21 %	00:00:	02					
							17					
					0%	- 00:00	:1/					

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.

- 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.

🕆 Add New Record		- • •
🖋 OK 🛛 🔞 Cancel		
Officer Name	Call Sign	
Norton, John 🛛 🖶 🗙	130C	•
Assigned Date/Time		
19/05/2011 10:00 AM : 🏢 🗙	Abandoned	
Start Date/Time		
19/05/2011 10:00 AM 📫 🥅 🗙		
Arrived Date/Time		
19/05/2011 10:05 AM : 🏢 🗙	Response Time	0 hrs 5 mins
Cleared Date/Time		
19/05/2011 11:00 AM : 🏢 🗙	Time On Site	0 hrs 55 mins
Officer Response Notes		
Conducted evacuation of staff from the	building.	*
		-
L		

- 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.

🗐 Edit Activity: AC	T1-2011-000413						
Ok Close							
♦ General Re	esponses Reque	sts Involvements	Attachments Assig	gnments			
Officer Responses	Organization Res	sponses					
= Add New =	Edit Remove						
Total: 2							
Officer Name	Call Sign	Assigned Date/Time	Start Date/Time	Arrived Date/Time	Cleared Date/Time	Response Time	Time On Site
Norton, John	130C	19/05/2011 10:00 AM	19/05/2011 10:00	19/05/2011 10:05 AM	19/05/2011 11:00 AM	0.08 hrs	0.92 hrs
Durov, Alex	PPM-002	19/05/2011 10:00 AM	19/05/2011 10:20	19/05/2011 10:40 AM	19/05/2011 12:00 PM	0.33 hrs	1.33 hrs
Conducted evacuati	ion of staff from the h	ilding					
	on or stan nom the be	anding.					Ê
@ -							*
~							

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.

- 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.

ganization	Organization Name	Involvement Type
👌 Metropolitan Fire an 🖶 🗙	Metropolitan Fire and Rescue Service	Responding Service/Agency 🔻
	Organization Number	Organization Type
m	C-9971-L	Municipal Agency 👻
S DEOLICAN	Notified Type	Reference Number
	Control Center 👻	FR-378
	Contact Person	Contact Phone
	🖸 Dalton, Trevor 🛛 🖶 🗙	780 555 7777
	EQ Daker, Gordon GP	
Called Date/Time		
Called Date/Time 19/05/2011 10:20 AM 3 III X	No Responses	
Called Date/Time 19/05/2011 10:20 AM 2 III X Arrived Date/Time	No Responses	
Called Date/Time 19/05/2011 10:20 AM : :::::::::::::::::::::::::::::::::	No Responses Response Time 0 hr(s	s) 10 min(s)
Called Date/Time 19/05/2011 10:20 AM : III X Arrived Date/Time 19/05/2011 10:30 AM : III X Cleared Date/Time	No Responses Response Time O hr(s	s) 10 min(s)

- 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.

4 Edit Activity: ACT1	-2011-000413									
Ok Close										
♦ General Resp	onses Requests	Involvements Atta	chments	Assignm	ents					
Officer Responses	Organization Responses									
= Add New = Ed	<u>dit</u> • <u>Remove</u>									
Total: 2										
Organization Type	Organization Name	Involvement Type	Called Dat	te/Time	Arrived Da	ate/Time	Cleared D)ate/Time	Response Time	Time On Site
Municipal Agency	Metropolitan Fire and	Responding Servic	19/05/2011	10:20	19/05/2011	10:30	19/05/2011	11:30 A	0.17 hrs	1.0 hrs
Municipal Agency	Metropolitan Police S	Indirectly Involved	19/05/2011	10:50	19/05/2011	11:20	19/05/2011	4:50 PM	0.5 hrs	5.5 hrs
Arrived at 10:30, check	ed the building and left at	11:30.								~
4										Ψ.
V ·										

Note an Action Request for an Activity

- 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.
- 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 \bigcirc 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.

Organization	Organization Name	Involvement Type
🖾 Campus Security 🛛 🖶 🗙	Window Glass Repair Service	Responding Service/Agency -
	Organization Number	Organization Type
	S-796-1	Corporation -
	Notified Type	Beference Number
	Dispatch 👻	4238-F
	Contact Person	Contact Phone
🖆 😣 🔤 🔤	🖸 O'Sullivan Flaine 🛛 🖨 🗙	780 555 7809
Window Repair Assigned Date / Time	🗓 Thiessen, Ryan 🛛 🖶 🗙	
20/05/2011 09:08 AM 🔅 🏢 🗙	780 555 7805	
Completed Date/Time		
20/05/2011 10:00 AM 🔅 🏢 🗙		
20/03/2011 10:00 AM 📜 🎰 🔨		

- 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.

🕘 Edit Activity: ACT1-	-2011-000413					
Ok Close						
♦ General ♦ Re	esponses Requests	Involvements	Attachments As	signments		
= Add New = Ed	it Remove					
Total: 1						
Organization Type	Organization Name	Involvement Type	Request Type	Assigned Date/Time	Completed Date/Time	Request Assigned To Person
Corporation	Windows Glass Repa	Responding Servic	Window Repair	20/05/2011 9:08 AM	20/05/2011 10:00 AM	Thiessen, Ryan
During the fire alarm eva	acuation 19/05/2011, an u	unknown person broke t	he second left wind	ow at the Front Entrance. N	North Campus Security has b	een called in to repair the window.
						~
🔨 ·						

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.

Brown, Jeff L	ADMIN-77 Title First Name Mr. Jeff Date of Birth 26/03/1980 Gender Hair Color Eve	Witness Initial Last Name L Brown Designation(s) Marital Status Divorced Color Height	 Employee? Interviewed? First Aid Administered? Injured Person Hospitalized?
Notes The only available witness is J	Brown Blue Brown who is seated in the cubicle s	e 6' 00" 176 lbs	

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.

🕂 Add New Record		
🗄 🛷 OK 🛛 🙆 Cancel		
Click To Add Clothing Details		*
- Eyewear Black		Remove
Clothing Type	Color	E
Eyewear 💌	Black 👻	
Description		
Black frame eye glasses.	A	
		,

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.

🖶 Add New Record		
🛛 🛷 OK 🛛 🐼 Cancel		
Click To Add Injury Details		
-		Remove
Injury Cause	Severity	=
Blunt Force Trauma 🔻	Minor 💌	
Description		
Hit by a falling book, bruised.	^	
	T	

Flag the Involved Person

- 1. Open the saved involved person's sub-record.
- 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.

🕂 Add New R	Record					x
🕴 🛷 ОК 🛛 🔞 🤇	Cancel					
☆ Flags						1
De	escription	Status	Severity	Fla Jeff	ag Notes f Brown is the only witness of the incident.	
👻 🗰 Wa	/anted	Yes 💌	Critical •	-		
💓 V Via	olent	Unknown 🔹		•		
💛 T Tre	respasser	Yes 💌	Low	-		
💛 I Infe	fectious	No 🔻		•		
💛 R Es	scapee	No 🔻		•		
🛕 A Am	med and Dangerous	No 👻		•		Ξ
						Ļ
-						

5. Click **OK** on the activity's form to save the changes made to the record.

Bdit Activity: ACT1-2011-0004	13								[
Ok Close										
♦ General ♦ Responses	Requests	Involveme	nts Attac	hments	Assignment	3				
Persons Organizations Ve	hicles Items									
= <u>Add New</u> = <u>Edit</u> = <u>R</u>	emove • G	o to								
Involved Person: 1										
Linked Person Last Name	First N	ame	Initial	Invo	lvement Type	Date of Birth	Gender	Employee?	Interviewed?	Notes
Brown, Jeff L Brown	Jeff		L	Witnes	55	26/03/1980	Male		V	The only avai
•	Title	First Name		Initial	last Name		Involvement T	vpe		*
A TOTAL SAL	Mr.	Jeff		L	Brown		Witness	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		=
	Date of Birth		Gender		Marital	Status	Designation(s)			
1	26/03/1980		Male		Single					
	Hair Color		Eye Color		Injurie	s: 1				
			Diue							
Y Stall	Drown				Clothi	ng: 1				
	DIOWI				Clothi	ng: 1				Ŧ

Add Organizations Involved in an Activity

- 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**.

🕂 Add New Record				×
OK Cancel				
Linked Organization				*
	Organization Name	Involvement Type		
	Metropolitan Police Service	Indirectly Involved	Ŧ	
Metropolitan	Organization Number C-9870-D	Organization Type Municipal Agency	•	
	Notified By Control Center	Reference Number H-9870		
	Contact Person	Contact Phone 780 555 0123		
Comments				
Called for supplementary investigation	l.		*	
				Ŧ

16. Click **OK** on the activity's form to save the changes made to the record.

a can Activity. ACTI 2011 000415						- • ×
Ok Close						
♦ General ♦ Responses R	equests Involvements Attr	achments Assignments	3			
Persons Organizations Vehicle	s Items					
Add New Edit Edit Remov	re Go to					
Involved Organizations: 1						
Linked Organization Organizat	tion Name Involvement Type	Organization Number	Organization Type	Notified By	Comments	
Metropolitan Police S Metropolitar	n Police S Indirectly Involved	C-9870-D	Municipal Agency	Control Center	Called for suppl	
•						•
	Organization Name	Contact Phone				
	Organization Name Metropolitan Police Service	780 555 0123				
	Organization Name Metropolitan Police Service Reference Number	Contact Phone 780 555 0123 Organization Number				E
Metropolitan	Organization Name Metropolitan Police Service Reference Number H-9870	Contact Phone 780 555 0123 Organization Number C-9870-D				E
Metropolitan Police	Organization Name Metropolitan Police Service Reference Number H-9870 Organization Type	Contact Phone 780 555 0123 Organization Number C-9870-D Involvement Type				E
Metropolitan Police Services	Organization Name Metropolitan Police Service Reference Number H-9870 Organization Type Municipal Agency	Contact Phone 780 555 0123 Organization Number C-9870-D Involvement Type Indirectly Involved				E
Metropolitan Police Services	Organization Name Metropolitan Police Service Reference Number H-9870 Organization Type Municipal Agency Notfied By	Contact Phone 780 555 0123 Organization Number C-9870-D Involvement Type Indirectly Involved				E
Metropolitan Police Services	Organization Name Metropolitan Police Service Reference Number H-9870 Organization Type Municipal Agency Notified By	Contact Phone 780 555 0123 Organization Number C-9870-D Involvement Type Indirectly Involved				E

Add Vehicles Involved in an Activity

- 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 \bigcirc in the image box.
- 16. Locate the image file in the browser window and click **Open**.

🖶 Add New Record			
OK Cancel			
Linked Vehicle	License Plate URV-345	Involvement Type Subject	
1112 1 1 1 1 1	Disposition Towed/Impounded	Year 2007 🗘	
	Make BMW 👻	Style 2 Door	
	Model M3 💌	Color Green 🔻	
Company Vehicle?	VIN 4LUKPI22222M333333	Vehicle Value \$103,250.00 USD	
Country Canada	Driver Identified		
State\Province Alberta	Vehicle Driver's ID	₽ ×	
Comments Abandoned on premises. Stolen items fou	nd inside.	~	

17. Click **OK** on the activity's form to save the changes made to the record.

🎒 Edit Activity: AC	T1-2011-000413							
Ok Close								
♦ General ♦	Responses Re	equests Involvements	Attachm	ients Assignme	nts			
Persons Organi	izations Vehicles	s Items						
Add New	Edit Remov	e = <u>Goto</u>						
Involved Vehicles:	1							
Linked Vehicle	License Plate	Involvement Type	Year	Make/Model	Vehicle Value	Vehicle Driver's ID	Comments	
URV-345	URV-345	Subject	2007	BMW/M3	\$ 103,250.00	Brown, Janice L	Abandoned on p	
antu		License Plate	Style					^
1111	1 CI CI	URV-345	2 Doo	r		Company Vehicle?		
		Year	Dispos	ition	l	Driver Identified		E
-		2007	Tower	d/Impounded				
		Involvement Type	Color					
		Subject	Green	1				
		VIN	Vehicle	e Value				-
Q -								

Add Items Involved in an Activity

- 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 \bigcirc in the image box.
- 15. Locate the image file in the browser window and click **Open**.

■ Add New Record		
OK Cancel		
Linked Item		
2 S	tem Name Laptop Serial Number XTP-400S Disposition Seized As Evidence tem Value \$2,135.00	
Item IS Evidence? Item Category Corporate Property ▼ Item Type	ltem Make Dell ▼ Item Model	
Laptop	Inspiron E1705 🔹	
Organization Owned By	Person Owned By	₽ ×
Notes Located at the cubicle ADMIN-77.		•

16. Click **OK** on the activity's form to save the changes made to the record.

	CT1-2011-0004	413						
Ok Close								
♦ General ♦	Responses	Requests	Involvements At	tachments /	Assignments			
Persons Organ	nizations Ve	hicles Items						
Add New	Edit R	emove = <u>Got</u>	<u>o</u>					
Involved Items: 1								
Linked Item	Item Name	Category/Type	Disposition	Item Value	Item IS Evidence?	Owner Identified/Known?	Organization Owned By	Person C
laptop	Laptop	Corporate Prope	. Seized As Evide.	\$ 2,135.00	V	$\overline{\checkmark}$	Sydney Police Service	Woods, Vie
•								Þ
•		Item Name	111	Category/Type				Þ
•		Item Name Laptop	111	Category/Type Corporate Pro	perty/Laptop			Þ
		item Name Laptop item Value	- 111 	Category/Type Corporate Pro Make/Model	perty/Laptop			×
		ltem Name Laptop Item Value	m s \$ 2,135.00 USD	Category/Type Corporate Pro Make/Model Dell/Inspiron E	perty/Laptop			Þ
•		Item Name Laptop Item Value Dispositior	m s \$ 2,135.00 USD	Category/Type Corporate Pro Make/Model Dell/Inspiron E Serial Number	perty/Laptop 1705			Þ
		Item Name Laptop Item Value Disposition Seized A	11 5 5 2,135.00 USD 5 Evidence	Category/Type Corporate Pro Make/Model Dell/Inspiron E Serial Number XTP-400S	perty/Laptop 1705			Þ
		Item Name Laptop Item Value B Disposition Seized A	* \$ 2,135.00 USD	Category/Type Corporate Pro Make/Model Dell/Inspiron E Serial Number XTP-400S	perty/Laptop 1705			Þ

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.

- 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**.
| Drag and drop files | below | | | - or - | Browse |
|--|------------------|------------------------|---------------------------|--------|-------------|
| Remove | Attachment Title | Attachment Type | Include when
printing? | | Description |
| | | | | | |
| Remove | | | | | |
| Attachment Title | | | | | |
| Attachment Type | • | Include when printing? | | | |
| Description | | | | | |
| | | | | | |
| File Name
File Extension
File Size | | | | | |
| | | | | 0 | < Cancel |

- 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.

4 Edit Activity: ACT1-2011-000413	
Ok Close	
♦ General ♦ Responses ♦ Requests ♦ Involvements Attachments Assignments	
Add New = Edit = Remove = View	
Total Attachments: 1	
Attachment Title Attachment Type File Name File Extension File Size Description	
Dell Inspiron E1 Picture bullet .jpg 1 KB Photo of the stolen laptop.	
Attachment Manager Downloading Dell Inspiron E1705 Opening bullet jpg Completed Transferred 1 Kb / 1 Kb Save As Open	
😢 -	

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.

🖶 Add New Record			
OK Cancel			
Assignment Type Information Request Assigned Date 19/09/2011 02:45 PM Due Date 20/09/2011 02:45 PM	• : ••• × : ••• ×	Assigned By Person Contract St. Jean, Clint Assigned To Person Campbell, Keith Completed?	♣ × ♣ ×
Completed Date	· 🔳 🗙		
Background check on Jef	Brown.		~

9. Click **OK** on the activity's form to save the changes made to the record.

4 Edit Activity:	ACT1-2011-000413	}				- • ×
Ok Clos	e					
♦ General	 Responses 	♦ Requests ♦ I	nvolvements 🔶 Attac	chments 🔷 Assignme	ents	
Add New	• Edit • Remo	ove Notify				
Total Assignmen	nts: 1 Completed /	Assignments: 0				
Completed?	Assigned Date	Assignment Type	Assigned By Person	Assigned To Person	Message/Task	
	19/09/2011	Information Request	St. Jean, Clint	Campbell, Keith	Background che	
0 CB: Clint - 1	9/09/2011 2:48:16	PM - LM: Clint - N/A				

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.

Mail				
	ABC	🐈 To: charle	ne.czirfusz@ppm2000.com	
	- Charles	🗣 Cc: randy	.whillier@ppm2000.com	
Attachments Priority Cut (opy Paste Check	Subject: Assign	ment Reminder (Description: ACT1-2011-000413))
Mail Document	Edit		Mail Properties	Options
Send Iment Details				
Assignment Type	Information Request		🔄 Add \ Remove Attachments	×
Assigned By	St. Jean , Clint		🤣 Proceed	🖶 Add 💢 Remove
Assigned To	Campbell, Keith		File Name	Size
Assigned Date	19/09/2011 2:45:00 PI	И	brown.jpg	935.83 KB
Due Date	20/09/2011 2:45:00 PI	И		
Completed?				
Completed Date				
Message/Task	Background check on	Jeff Brown.		
			·	
Activity Details for ACT1-2011-000413				
Reported D ate/Time	19/09/2011 10	:49:53 AM		
Call Category	Activated Alarr	n		
Lo cation				

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

- 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").
- 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.
- 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.

🚳 Send	Message											
Mail												
-					ABC	6	To:	k_r_whillier@shaw.ca				
Send	Attachments	Priority			ta Chark		Cc:	mj.parker@heros.com			Format	
Jenu	Attachments	- Thomas	cut ci	ору газ	Ste Check		Subject:	Record Details (Activity Number: AC	T-2011-0	9-00080)	Tormat	
	Mail Documen	t		Edit				Mail Properties			Options	
Activity D	etails for ACT-2011	1-09-00080					🖢 Ado	I \ Remove Attachments			X	-
Priority		Importan	t				i 👩 Pr	oceed		🖶 Add	🗙 Remove	
Reported [Date/Time	13/09/20	1112:10:23 P	М			File Nee	2		Ci-		
Assigned I	Date/Time					_	image01	6 ing		920 B	c .	
Closed Da	ate/Time					_	Inageo	0.199		000 D	yico	E
Location		Aome Un	iversity/Admin	istration Bu	uilding	_						
Address		1112 Uni	versity Drive			_						
		Carada/	Aberta/Edmor	ton		_						
		T1A 2B3				_						
Cal Taker	n By	Woods, \	/ictoria									
Dispatche	ed By	Remnyak	ova, Svetlana	A								
Record Or	wner											
Descriptio	n	The fire a the buildi 7/Section blocked, building t minutes.	alarm sounded ng by 10:20 an 12 discovered sothey had to ofind an exit The situation r	at 9:58 an m. Employe that their fi walk to the This delaye requires a t	n. Most staffev ees working at l re exit had bee e other side of t ed their evacua horough facility	ecuat evel he tion b cheo	ted by 10 bk.					-

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.

Activities										
50P? 🏹	Activity Number	Priority 7	Officer Status ▽	RTA Alert	Time Remaining	Call Category	Y	Site Rollup	7	Off Site 꼬
	ACVP-2013-08-00027	Low_4	Waiting			Alarm				
🦺 E	dit Activity ACVP-2013-08-00027									
0	K Close									
•	General Responses Reque	ests Involven	nents Attachments	Assignments	3					
	Activity Details					Su	pplemental	Details		
F	Reported Date/Time	Code	Level 1	Prio	rity	Ca	II Source			
	08/13/2013 04:25 PM	4	Alarm	Lov	v					
	Future dates will display only in Scheduled Activities.		Level 2			ini Liz	tiated By			

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.

On Duty Officer							
Ok Close							
Wayne	Search	Officer Name	Team	Call Sign	Last Known Position	Assign Workgroup	-
All Workgroups		Wayne, Bruce	Team 2				
MS01 Workgroup J Workgroup B Workgroup A Workgroup H	^						

- 7. Select the required officer's **Call Sign** from the list and enter the appropriate **Notes**.
- 8. Click **OK** to complete the operation.

Update Ca	III Sign for Way	ne, Bruce			
Ok	Close				
Call Sig PPM-0 PPM-0 PPM-0 PPM-0 PPM-0	an 04 05 06 07 08			 ↓	
Notes (Call Sig	(Optional) n change]

- Optionally, continue to bring more officers on duty repeating the previous steps, change their Call Signs by clicking the call sign update button ⁽¹⁾, or delete some officers from both the on duty list and the Available pane by clicking the delete button ⁽²⁾.
- 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.

On Duty Officer								- • ×
Ok Close								
Wayne	Search	Officer Name	Team	Call Sign	Last Known Position		Advanced Users	•
All Workgroups							Wayne, Bruce	
MS01 Workgroup J Workgroup B Workgroup A Workgroup H						() () () () () () () () () () () () () (

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 ³ **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.

0							Perspec	tive Dispatch	log							
Start	Schedul	e Opti	ions	6.6			PN	» 🚖	0		4				6	~ 🕑
29	- K) 🔇		~~~	- 🔶 🔒	r - e e	14		Ø	4) 😂	, (₁	() ()	: 🔯 🕚	6	*	
Start	Close Or Activity Dut	Off Duty	Dispatch Officer	Dispatch Organization	Arrive Ar	rive Clear Clear All All	Activ Deta	ity Officer ils Log	Attachment	SOP Refre	sh	Location Statu	ıs Mail Ca	llSign	Workgroups Filter	Activity Notes
	Dispatch	· · ·		Ĩ,	Actions				Record				L	og		
Activities																
SOP?	Activi	ity Number	r Pi	riority 🖓	Officer Stat	us 🏹 🛛 RTA Ale	rt i	Time Remaining	Call	Category	7	7 Loc	ation	V	Off Site	Reporter
	CEN-20	11-10-000	08	Low	Waiting					Alarm		Asis Conv	vention Center			07/
	CEN-20	11-10-000	07	High	Waiting					Alarm		Asis Conv	ention Center			07/
	CEN-20	11-10-000	05	Low	On Rout	e			Security Dire	cted Activity/F	Facility	Centra	al Campus		V	07/ =
	CEN-20	11-10-000	03	Low	On Scen	e			General A	ssistance/Ass	sist	Central Campu	s/Building 2	. 🕕		07/
	CEN-20	11-10-000	02	Low	On Rout	e 91 %		00:18:15	Security Dire	cted Activity/F	Facility	Central Camp	ous/Building 1			07/
	CEN-20	11-10-000	01	High	On Scen	e			Alarm/Access	Control/Door	r Forced	Central Campu	s/Building 2	. 🕕		06/
	CEN-20	11-09-001	22	Low	Waiting			- 6125	General /	Assistance/Es	cort	Central Campu	s/Building 2 - :	.к	V	22/ -
Available							Acci	aned								•
E	Time ⊽ lapsed ♡	Team 🖓	Call ⊽ Sign ▽	Officer/Or Na	ganization me	Status 🗸	^	Time Elapsed	♡ Team ♡	, Call _{\\} Sign \\	Officer	/Organization ₇ Name	7 Status	V	Activity I	lumber
8	4d 1h	P2	512	Hoyt, Craig		Available	8	4d 1h	P2	130B	George	e, Sarah	On Scene		CEN-2011-	10-00001
8	3d 23h	P4	C300	Rosenburg,	Brian	Lunch - 30	8	00:02:10	P4	C322	Shantz,	Gregg	On Route		CEN-2011-	10-00005
8	4d 1h	P4	C330	Rutherford,	Justin	Out of Service	8	00:01:45	P4	C325	Kenned	ly, Frank Jr.	On Route		CEN-2011-	10-00002
8	4d 1h	P2	131B	Camillo, Ton	у	Busy										
•						÷.	•									÷
113	6 AM															

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.

2									1	Perspectio	ve Dispatch	Log									
Start Start	Cose Activity Dispa	On Duty tch	Ope Ope	Dispetch Officer	Dispatch Organization	Actions	Arrive All	- Q	Qear All	Activity Details	Officer Log	Attachmen Record	t SOP	C Refresh	7	© ocation	Status	Mai	CattSign	Workgroups Fiber	Activity Notes
chuites								1													
5097		ctivity	Number		Priority 7	Officer !	Status '	B	Mert	Re	Time	0	all Catego	ary	v		Local	ion .	v	Off Site	Reporter
г	CEM	¥-201	1-10-000	07	Thigh	Da.	Hold	-	Citra I		0.29:19		Alarm			As	is Conve	ntion Cen	ter	Г	07/
-	CEM	N-201	1-10-000	03	1.0m	Ons	cene					Gener	el Assisten	ce/Assist		Central	Campus/	Building	2- 0	п	07/
Г	œ	N-201	1-09-001	22	Une	Wa	ting	A	10		- 6d 2h	Gene	al Apsista	nce/Escort		Central	Campusi	Building :	2-3.K.	P	22/
0							_	1													
unlable	È									Assig	ed										
E	Time lapsed	v	leam . V	Call Sign	V Officer/O	rganizati sme	-	Status	· Y	v	Time Elapsed	⊽ Team	V Cal	v 0	ficer/C	irganiza ame	tion _V	State	s v	Activity	Number
2	4d th		a -	ERTS	Norton, Joh	10	-	sidelier		8	4d 1h	P2	1379	0	vera, D	erek		On Sce	ne.	CEN-2011-	10-00003
2	4d sh	. 1	2	1318	Camillo, To	ey.		diy .	- 1	8	00:06:49	P2	137	n 0	wens, i	Derek		On Hole	1	CEN-2011-	10-00007
-		-	-	Concerned and the second			-		100	100.0											

 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.

C									P	erspec	tive Dispato	hLog									
Star	t Sch	edule	Opti	ons																	۵ 😮
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8	Ad 1h P2 131B Camillo, Tony					Bu	sy		8	00:02:36	P2	137B		Owens,	Derek		<u>On Hold</u>		CEN-2011-1	0-00007	
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11	-39 AM		_												_		_				

• 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 **V**.
- 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.

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12:	12:07 PM																					

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.

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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 ⁴/₄ 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.

Jp	date Status	
	Ok Close	
	Status Busy 👻	
	Notes (Optional)	
	The officer is busy filing administrative paperwork.	

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 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 is 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.

~			
Site Acme University	-	Off Site	
Achie University	•		
Building			
Administration Building	•		
Location			
East Wing	-		
Section			
Front Entrance	-		
Comments (Optional) The packet has been found or	the left	hand side of the front entrance.	

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.

Update Call Sign for Wayne, Bruce	
Ok Close	
Call Sign PPM-004 PPM-005 PPM-006 PPM-007 PPM-008	* •
Notes (Optional) Call Sign change	

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 $\stackrel{\bullet}{\rightarrow}$ 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.

- 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.

4 Edit Activity SOP(s): CEN-2011-10-00016		
OK Close		
Fire Alarm SOP		
Notification can only be sent from DispatchLog.		
Email Message ready to be sent		
Mass Notification has been sent successfully on: 11	/10/2011 1:32:31 PM	
Description:		
For any fire alarm event, follow the attached fire alarm SOF	2	
Details Email Message Mass Notification		
SOP CheckList(s):	SOP Attachment(s):	SOP Links(s):
Review attached Fire Alarm Checklist	Sire_Alarms	MIR3 in Enterprise Login Page
If alarm is verified, final event should be cleare		SOP for Handling Security Incidents at Acr
If confirmed, call Fire Services		
If confirmed, initiate evacuation procedure and		
Notify supervisor		
		4
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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.

Details	Email Message	Mass Notification	
	To	brian@ppm2000.com	
Send	Subject	Fire Alarm	
	Message	A confirmed fire event has occurred at this site. Please authorize emergency evacuation procedure.	*

6. If no mass notification has been sent yet, you can send a mass notification from the MIR3 tab using the MIR3SM inEnterpriseTM 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.

eport Summary							
Title: Ha	arper Building Evacuat	ion one Time:	0	Status:	INITIATED		
Initiated By: Em	nergency Notification	Expedited Delivery:	STANDARD	Issued:	11/10/2011 1:32:22 PI	M	9
Type: BR	ROADCAST	Report ID:	8516016	Completed:		Re	efresh
lessage Content Message: Ti Fi Response: Li	There is an emergency or your safety please it	situation in progress at t	he Harper Building in th e building and surroundi	e Central Campus (1 ing area.	865 105 Avenue).	Statistics Total Recipients: 10 Total Contacted: 10	
H	am exiting the building lelp. I am unable to ex	building. now. it the building.				Total Responded: 0	
ecipients	am exiting the building telp. I am unable to ex	building. now. it the building. Responded	Device		Status	Total Responded: 0	-
ecipients Name Duliba, Daryn	In safety clear of the m exiting the building telp. I am unable to ex Issued 11/10/2011 1:32	in and the building. it the building. Responded	Device Daryn.Duliba@pp	EMAIL_SENT	Status	Total Responded: 0	
Name Duliba, Daryn Fernandes, John	am saley deal of the building relp. I am unable to ex Issued 11/10/2011 1:32	it the building. Responded	Device Daryn.Duliba@pp John.Fernandes	EMAIL_SENT EMAIL_SENT	Status	Total Responded: 0	
Name Duliba, Daryn Fernandes, John Kennedy, Frank	am saley deal of the building relep. I am unable to exc Issued 11/10/2011 1:32 11/10/2011 1:32	t the building. Responded : :	Device Daryn.Duliba@pp John.Fernandes Frank.Kennedy@	EMAIL_SENT EMAIL_SENT EMAIL_SENT	Status	Total Responded: 0	
ecipients Name Duliba, Daryn Fernandes, John Kennedy, Frank Marsh, Lee	am sating yold of und of the building rep. I am unable to exceed 11/10/2011 1:32 in 11/10/2011 1:32 11/10/2011 1:32 11/10/2011 1:32	it the building. Responded Responded : :	Device Daryn.Duliba@pp John.Fernandes Frank.Kennedy@ Work Email	EMAIL_SENT EMAIL_SENT EMAIL_SENT EMAIL_SENT	Status	Total Responded: 0	

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 ⁴/₃ on the toolbar and select only the workgroups for which you want to display the activities. Click **OK** to confirm your choice.

Select Workgroups	
OK Close	
All Workgroups WebForm MSC RDMD Doons Central West Valley	

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 <a>. 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 <a>.. All the activities that are related to the selected officer/organization will be highlighted on the Activities pane.

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	Activity Du Dispatch	ty Duty	Officer	Organization	Actions	All	А	11	Details	: Log	Record							Log	Filter	Notes
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SOP?	Activ	ity Number		Priority V	Officer St	atus 🗸	RTA A	lert	R	Time emaining	Cal	Cate	gory		7	Locati	on	V	Off Site	Reported Date
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	CEN-20	11-10-000	15	Low	Waiti	ing					Secu	rity Di	rected							1:27 PM
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	CEN-20	11-10-000	07	High	Clear	red						Alar	m		Asi	s Conven	ition Cent	er		07/10/201
	CEN-20	11-10-000	05		On Ro	On Route				Security Directed Activity/Facility Central Campus								\checkmark	07/10/201	
	CEN-20	11-10-000	03	High	On So	ene				General Assistance/Assist Central Campus/Building 🌗							g 🚺		07/10/20	
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8	02:05:52	P2	130B	George, Sa	rah	Availa	able		8	02:46:35	P4	C3	22	Shant	z, Gregg		On Rou	te	CEN-2011	-10-00005
8	02:05:56	P4	C325	Kennedy, F	rank Jr.	Availa	able		8	02:08:36	P2	17	7B	Duoro	ov, Alex		On Sce	ne	CEN-2011	-09-00152
8	02:06:01	P2	143B	Holland, Ma	aximus	Availa	able		8	00:00:33	P2	13	7B	Owen	s, Derek	[Suspen	ded	CEN-2011	-10-00003
8	02:06:57	P4	C330	Rutherford,	Justin	Lunc	h - 30		8	00:00:40	P2	13	7B	Owen	s, Derek		<u>On Hold</u>	L .	CEN-2011	-10-00008
8	01:41:09	P2	135B	Faulds, Ian		Availa	able		8	00:00:33	P2	13	7B	Owen	s, Derek		On Rou	te	CEN-2011	-10-00015
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2:	10 PM							,												,

3. To cancel the highlight, deselect the Highlight icon.

Filter all Dispatched Officers/Organizations for One Activity

- 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.

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	Activity Di Dispatch	ity Duty	Officer	Organization	Actions	All	All	Detai	s Log	Record							Log	Filter	Notes	
Activiti	es																			
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	Time Elapsed	Team 🖓	Call ⊽ Sign ▽	Officer/Or Na	rganization Ime	Status	7	V	Time Elapsed	∀ Team	∀ Call Sign	V	Office	r/Organiza Name	tion ₇	Statu	is 🖓	Activity	y Number	
8	01:45:40	P2	512	Hoyt, Craig		Available		8	01:58:24	P4	C300		Roser	iburg, Brian		On Sce	ne	CEN-201	1-10-00003	1
8	8 02:09:26 P2 130B George, Sarah							8	00:04:07	P2	137B		Owens	s, Derek		Suspen	ded	CEN-201	1-10-00003	1
8	8 02:09:30 P4 C325 Kennedy, Frank Jr.																			
2	01:45:35	P2	510	Dolby, John	1	Out of Service	ce	1												
	14.04						*											This is	the data	
2	14 PM																	11115 15	the data	9

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 the toolbar.
- 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.

🐻 Officer Log							(- • ×
Close								
Officer Log Report Owens, Derek	Sta	ndition atus Change	Criteria Previous 30	Days 👻 Sea	Print]		
Activity Number	Officer Name	Change Type	Call Sign	Location	Status	Date/Time	Comments	-
CEN-2011-10-00015	Owens, Derek	Status	137B	Central Campus/	On Route	11/10/2011 2:10:19 PM		
CEN-2011-10-00003	Owens, Derek	Status	137B	Central Campus/	Suspended	11/10/2011 2:10:19 PM		
CEN-2011-10-00008	Owens, Derek	Status	137B	Central Campus/	On Hold	11/10/2011 2:10:12 PM		E
CEN-2011-10-00003	Owens, Derek	Status	137B	Central Campus/	On Scene	11/10/2011 12:16:02 PM		
CEN-2011-09-00122	Owens, Derek	Status	137B	Central Campus/	Cleared	11/10/2011 12:06:55 PM		
CEN_2011_09_00122	Owane Barak	Statue	137R	Cantral Campuel	On Route	11/10/0011 11-38-29 AM	∢ ∢ Page 1	• • • • • •

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** ¹/₂. 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 **E** on the DispatchLog toolbar.

					Activities for Owens						×
🏽 🖬 🖶 🕱	Scheduled Enabled	Activity Number	Officer Status 🗸	Time Remaining	Call Category 7	7 Location ♥	Call Taken By	₩.		Address	V
SOP?	7	CEN-2011-10-00013	Waiting		Security Directed Activity/Facility	South Centering	Owens, Derek			Clear Filter	
Scheduled Enabled		CEN-2011-10-00012	Waiting		Security Directed Activity/Facility	South Center/ng	Owens, Derek		v	(AII)	
Activity Number		CEN-2011-10-00011	Waiting		Security Directed Activity/Facility	South Center/ng	Owens, Derek			🔽 (Blanks)	
Priority E		CEN-2011-10-00014	Waiting	- 02:39:50	Lost &Found/Lost Property/Personal	. 150 King Str	Owens, Derek			Kennedy, Frank	
Officer Status		CEN-2011-10-00003	On Scene		General Assistance/Assist	Campus/Build	Owens, Derek			Mhiessen, Ryan	
Time Remaining											
Call Category											
Location											
Off Site											_
Reported Date/Time										OK	C
Organization Status									-		_
Notes *											

Perspective Visual Analysis

Welcome to Perspective Visual Analysis[™], an optional module of Perspective by PPM 2000[™] the industry leader in Incident Reporting and Investigation Management software. 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/W8rK1I.
- 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

- 1. Log on to Perspective.
- 2. 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).
- 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.
- 4. In the Listing pane, find and select the record you want to build your link chart from.
- 5. Click the **Visual Analysis** icon a 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:

đ	Print on Single Page	Prints all details of your chart on a single page.
4	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.
47	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.
ຕ	Panning Tool	Enables dragging of the entire link chart allowing you to quickly view different areas of the chart.
R	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.
۲	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.
P -	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.

		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.
A.	Find	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.
		Find
		Find Text: suspect
		C Entities Exact Match
		C Links
		OK Cancel
=- +	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.
2	Activity	Hides activities from your link chart.
	ltem	Hides items from your link chart.
8 5	Organization	Hides organizations from your link chart.
2	Person	Hides persons from your link chart.
G	Vehicle	Hides vehicles from your link chart.
-35-	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).
-35	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.).
٢	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/W8rK1I.
- 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/W8rK1I.
- 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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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 section.



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

Loss 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.



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 sin 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 set.



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 sin 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 set.



Perspective GaugeResembles 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.Perspective GaugeThe 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.

B Z ∐ ↔ = = = = = Format	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.
Normal Page Style Float Text Style	Choose the text highlight and font color . Toggle document views, choosing between the Normal , Page Style , or Float (default) view.
Sealed	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

Insert Insert Insert Table Image Hyperlink Edit Tools	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.
Paragraph Format Dialog Format Edit Tools	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.
Print Print Print Preview Print Tools	If you want to print your document, click the Print button. To preview the document before printing, click Print Preview .

Spelling tab

ABC	Although the spel
Check	enter (the incorre
o	correct each spell

I check option is automatically applied to the text you ct text is underlined with a red wavy line), you can 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 \blacksquare and radio buttons \odot . 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

18/08/2011 12:00 AM 🗦 🏢 🗙

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).

•		Nove	mber,	2010		•
Sun	Mon	Tue	Wed 3	Thu	Fri	Sat
31	1	2		4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7 T	8 oday:	9 03/11	10 /2010	11

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 imes to the right of the Calendar icon.

Lookup List Fields

Security & Safety Systems

To display all options contained within a lookup list, simply click the down arrow beside the lookup field or use the keyboard shortcut Alt+1.

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.

Class	Class
pl 💌	pol
Policy Violation	Policy Violation
Procedural	

Ŧ

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

Serial Number	Quantity	F	Recovered Amount	Height
ADMIN-55-678	3 🕻		\$5,000.00 CDN	5' 40"

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.

Linked Person	Linked Person
토 버 🛟	🔨 🖾 Brown, M 🗣 🗡
Abrams, Terry X	Brown, Mike
Bannner, Bruce	Brown, Murray
Bowman, Bryant	
Bowman, Bryanta	
Brown, Murray	
Hammond, Bradley	
Wise, Abraham	
Wise, Abraham	

Second, you may select the data entry from the appropriate Entity List that opens when you click the Add icon \clubsuit 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.

Entity List	
•	N 🗙 🗸 😫
🔒 Wysen, Aaron	
DOB: Unknown	Male
🕆 Woodsman, Abbott	
DOB: Unknown	Male
🕆 Woods, Victoria	
DOB: 07/12/1978	Male
🕆 Woods, Chuck	
DOB: 01/01/1980	Female
🕆 Woods, Abel	
DOB: Unknown	Female
🕆 Woodcott, Jason	
DOB: Unknown	
🕆 Wolf, Abner	
DOB: Unknown	Male
ið View Details	Quick Add 🖌 Select 😣 Close

- 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 ³

- 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.

🕂 Quick Add Record									• ×
🛃 Save 🛛 🐼 Cancel									
{ New Person }									
General Contact(s) Contr	ols								
	Title Mr. ▼ Date of Birth	First Name David	Gende	Initial		Name h Marital	Status	Designation Ph D	* II
	Eye Color Blue	+	Hair Color Brown	Ŧ	Height	5' 05"	Weight 165 Ibs		
Additional Information									
1							*		-

After populating a pick list field with a selected entity, you may click the **View Details** icon it 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 \times located next to the Add button to clear the field of the current selection.

Text Fields

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.

Summary				
On the above mentioned date and time the break, her laptop was stolen directly from	ich 📃	unch		
The laptop is an XTP-400S with a value of	of \$2900.00.		Add to Dictionary	
Currently, there are no suspects in this inc	cident. The only available witness is Jeff Brown who is seated in the	1	gnore All	
cubicle section three rows over. Investig	subicie section three rows over. Investigation continue, rollow up to be completed.			
		(Cut	
		(Сору	
		1	Paste	
			Delete	
		:	Select All	

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.

Style List Border	Advanced st.
Appearance Styles: Current From Designer Earth Tones LightSteelBlue GrayScale SemiTransparent ExcelLike LightBeige Berry Chocolate Fire GreenBlue	Current Chart:

• Under the Border tab, choose a Border Style and, if applicable, the Border Color and Fill.

Style List Border A Select a chart border.	dvanced
Border Style:	Current Chart:
TitleRoundedInside	Employees' Marital Status by Gender
Border Color:	1000
Border Fill: Solid Gradien Hatc	500
VerticalCenter	
	- 6-

 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 <i>component</i> of Perspective contains such forms, or <i>components</i> , as Incidents, Cases, Activities, Items, etc. The components within Data Forms are graphically represented by <i>banners</i> 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 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.
lcon	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.
Рор-Uр	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 <i>screen</i> 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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