



Perspective[™]

by PPM

Portal

USER'S GUIDE

Perspective by PPM™

Version 1.0

Printed September 2013

Copyright © 2013 PPM 2000 Inc. and its licensors. All rights reserved.

PPM 2000, the PPM 2000 logo, Perspective by PPM 2000, the Perspective by PPM 2000 logo, Perspective by PPM, the Perspective by PPM logo, Perspective Focal Point, and the Incident management from every angle logo are trademarks or registered trademarks of PPM 2000 Inc.

Information in this document is subject to change without notice.

Companies, names, and data used in the examples herein are fictitious unless otherwise noted.

Although every precaution has been taken in preparation of this document, PPM 2000 Inc. assumes no responsibility for errors or omissions. Neither is any liability assumed for damages resulting from the use of the information contained herein.

Permission to modify and distribute this document strictly for the purpose of internal user training is hereby granted, provided that it is made evident the document has been modified, and that all copies contain all proprietary notices set forth in or on the original version. PPM 2000 Inc. assumes no responsibility for errors or omissions resulting from the modification of this document. PPM 2000 Inc. expressly waives all liability assumed for damages resulting from the modification of the information contained herein. Notwithstanding the permission granted herein, no part of this document may otherwise be reproduced, transmitted, disseminated or distributed, in any form or by any means, electronic or mechanical, for any other purpose, without the express written permission of PPM 2000 Inc.

Adobe, the Adobe logo, Acrobat, and Reader are trademarks or registered trademarks of Adobe Systems Incorporated in the United States and other countries.

Apple, the Apple logo, iPad, iPhone, iPod, iPod touch, and iTunes are trademarks of Apple Inc., registered in the U.S. and other countries. App Store is a service mark of Apple Inc.

BlackBerry, SureType, SurePress, and related trademarks, names, and logos are the property of Blackberry Limited and are registered and/or used in the U.S. and countries around the world.

Brivo ACS WebService is a registered trademark of Brivo Systems LLC.

dtSearch is a registered trademark of dtSearch Corp.

Google, Google Chrome, and Android are trademarks or registered trademarks of Google Inc.

i2, the i2 logo, and i2 Analyst's Notebook are registered trademarks of IBM Corporation.

Identity Resolution Engine (IRE) is a trademark of Infoglide Software Corporation.

IDV Solutions and Visual Command Center are trademarks or registered trademarks of IDV Solutions, LLC.

Lenel, the Lenel logo, OnGuard, and the Lenel OpenAccess Alliance Program (OAAP) are trademarks or registered trademarks of Lenel Systems International Inc.

Microsoft, Windows, Windows Vista, Windows Server, SQL Server, Access, Internet Explorer, Excel, PowerPoint, Outlook, Active Directory, Visual Studio, Visual Basic, the Office logo, .NET logo, and Microsoft Gold Independent Software Vendor (ISV) Partner logo are trademarks or registered trademarks of Microsoft Corporation in the U.S. and other countries.

MIR3 is a service mark of MIR3, Inc. inAccountPortal, inTechCenter, inAlertCenter, inEnterprise, and Intelligent Notification are trademarks or registered trademarks of MIR3, Inc.

Mozilla, the Mozilla logo, Firefox, and the Firefox logo are trademarks or registered trademarks of the Mozilla Foundation.

QlikTech, the QlikTech logo, and QlikView are trademarks of QlikTech International AB.

Samsung, Galaxy S, and Galaxy Note are trademarks of Samsung Electronics Co., Ltd.

Wi-Fi is a registered trademark of the Wi-Fi Alliance.

All other products, brands, names, or trademarks mentioned in this document may be trademarks or registered trademarks of their respective owners.

Contents

Welcome to Perspective Portal	3
About Perspective Portal.....	4
Home	5
User Interface.....	6
Report an Incident	8
Request an Officer	12
Portal Setup.....	13
Administrators	13
Manage	14
Primary Settings	15
Default Messages	16
Report an Incident.....	17
Request an Officer	18
Themes	20
BOLOs, Announcements, and Links	21
Add BOLOs	21
Add Announcements.....	22
Add Links.....	24
Edit Announcements, BOLOs, and Links.....	25
Delete Announcements, BOLOs, and Links	25
Glossary	26
Contact Information.....	28
Technical Support	28
PPM 2000.....	28

Welcome to Perspective Portal

Welcome to Perspective Portal™ by PPM 2000™—the industry leader in Incident Reporting and Investigation Management software. Perspective not only records and tracks incident data, but also assesses and analyzes it to chart trends, and report statistics. Portal complements Perspective with remote electronic reporting capabilities.

Remote electronic reporting saves data entry time, accelerates the investigative process, and gives every user the opportunity to quickly and efficiently report incidents. Portal widens the scope and effectiveness of Perspective without bringing on additional users and unnecessary expense.

About Perspective Portal

Perspective Portal enables any user, on site, or in a distant location, to report an incident as soon as it occurs through the Portal webpage. Once an incident has been entered and submitted from Portal, it lands in the Perspective Gateway. Please refer to the [Perspective User's Guide](#) or Help file for further information on the assessment and review of reports submitted through Portal into the Gateway.

Additionally, Portal allows users to request an officer (requires Dispatching—available in the SOC and EIM editions of Perspective).

Finally, Portal provides users with a central place to view information, such as announcements, things and people to be on the lookout for (BOLOs), and links.

Note: All images were taken using Google Chrome version 29.0.1547.76 m. Updates to Google Chrome or Perspective Portal may result in slight discrepancies between the illustrations in this guide and what you may see on your screen.

Home

When you navigate to Portal, your browser displays the Portal homepage.

From the Portal homepage, you can do the following:




1. Navigate to the Report an Incident page.
2. Navigate to the Request an Officer page.
3. View pertinent information. This information is organized into three different areas: BOLOs (Be on the Lookout), Announcements, and Links.

User Interface

The Perspective Portal user interface is intuitive and designed to make reporting an incident as straightforward as possible. Additionally, you can request an officer, who will be dispatched through DispatchLog. There are a variety of other features of Portal, which are described in length below (Figure 1.1).



Figure 1.1: Portal homepage user interface

1. **Logo:** Administrators may change the Portal logo in Manage .
2. **Portal:** This area displays the Portal you are currently in. To view a list of all the public Portals you have access to, click the drop-down button .
3. **Login:** The only users who will need to, and have the access rights to log in to Portal are Administrators and Supervisors.
4. **Home:** Clicking the Home button  will bring you back to the homepage.






5. **Default Message:** A message appears on the top of every Portal screen (Home, Report an Incident, Request an Officer), explaining what each page of Portal is designed to do, and instructs you on what tasks can be accomplished, and where. These messages are set by an Administrator.
6. **Report an Incident:** To report an incident or suspicious activity, click this button. On the Report an Incident page, you will be prompted to enter report details.
7. **Request an Officer:** To request an officer, click this button. Officers will be dispatched through Dispatching.
8. **BOLOs:** The BOLOs (Be on the Lookout) area is where thefts, stolen items, vandalized vehicles, etc. appear, so that you know what to be aware of.
9. **Previous & Next:** Previous and Next allows you to navigate through additional BOLOs.
10. **Announcements:** The Announcements area is where any upcoming events or changes will be posted.
11. **Links:** The Links area is typically used for internal websites, such as your company's website, events, and/or contact lists.

Report an Incident

When an incident occurs in your workplace or on company property, use Perspective Portal to immediately notify the appropriate personnel within your organization, so that the situation may be resolved as soon as possible:

Note: The following example shows all fields set to visible.

Please refer to Figure 2.1 when going through the following steps.

1. Click the **Home** button .
2. Click the **Report an Incident** button.
3. Type your first name in the **First Name** field.
4. Type your last name in the **Last Name** field.
5. Type your phone number in the **Phone Number** field.
6. Type your email address in the **Email Address** field.
 - Or, you may forego steps 3 - 6 and check the Is Anonymous box to report the incident anonymously.
7. Select the **Occurred From** date in one of the following three ways:
 - a. Type the date.
 - b. Click on the month, day, and year fields, and change them by clicking the corresponding **up** and **down** arrows .
 - c. Click the **down** arrow  and select the date from the pop-up calendar.
8. Input the **Occurred From Hour**, or use the arrows to select it.
9. Input the **Occurred From Minute**, or use the arrows to select it.
10. Select the **Occurred To** date in one of the following three ways:
 - a. Type the date.
 - b. Click on the month, day, and year fields, and change them by clicking the corresponding **up** and **down** arrows .
 - c. Click the **down** arrow  and select the date from the pop-up calendar.
11. Input the **Occurred To Hour**, or use the arrows to select it.
12. Input the **Occurred To Minute**, or use the arrows to select it.

13. Identify the incident's **Class** from the drop-down menu.

- Depending on the class you choose, more drop-down menus will appear, allowing you to narrow it down as necessary. These fields are hierarchical, meaning that the option selected in the first field determines the options that are available in the second field, and so on. The options that appear in these lists have been customized by your organization.

Report an Incident

Reported By

Is Anonymous

* First Name * Last Name Phone Number Email Address

Incident Information

* Occurred From Occurred To * Class Rollup Site Rollup

09/13/2013 mm/dd/yyyy -- Select -- -- Select --

Hour Minute Hour Minute

12 44

Incident Summary

Reported to Supervisor Disposition Name Business Units File Number

Reported to Police -- Select -- -- Select --

Reported to Division

Add Person **Add Organization** **Add Vehicle** **Add Item**

Incident Narrative

Select Attachments

Figure 2.1: Report an Incident form

14. Identify the incident's **Site Rollup** from the drop-down menu.

- Depending on the site rollup you choose, more drop-down menus will appear, allowing you to narrow it down as necessary. These fields are hierarchical, meaning that the option selected in the first field determines the options that are available in the second field, and so on. The options that appear in these lists have been customized by your organization.

15. Type a short summary in the **Incident Summary** field.

16. If the incident has been reported to a supervisor, check the **Reported To Supervisor** box.
 - a. Type the supervisor's name in the **Supervisor Name** field.
 - b. Optionally, select the Disposition Name from the drop-down menu.
 - c. Optionally, select the Business Unit from the drop-down menu.
 - d. Optionally, input the file number in the File Number field.




17. If the incident has been reported to police, check the **Reported To Police** box.
 - a. Type the police file number in the **Police File Number** field.
 - b. Optionally, select the Disposition Name from the drop-down menu.
 - c. Optionally, select the Business Unit from the drop-down menu.
 - d. Optionally, input the file number in the File Number field.

18. If the incident has been reported to a division, check the **Reported to Division** box.
 - a. Select the division from the **Division Name** drop-down menu.
 - b. Optionally, select the Disposition Name from the drop-down menu.
 - c. Optionally, select the Business Unit from the drop-down menu.
 - d. Optionally, input the file number in the File Number field.

19. Click the **Add Person**, **Add Organization**, **Add Vehicle**, and/or **Add Item** button to add involvements.

20. Type a detailed narrative in the **Incident Narrative** field.


21. Click the **Select Attachments** button to add an attachment to the incident. You can add multiple attachments.
 - Portal supports the following file types as attachments: .jpg, .png, .doc, .docx, .pdf, .xls, .mp4, and .mp3.

22. Click the **Submit** button .
 - Required fields display with red asterisks * beside them. These fields must be filled out before the incident can be submitted. Failure to fill out required fields will result in an error message.
 - Once the incident has been submitted, you will be taken to a new page that tells you the incident was created successfully, and the incident number will be given to you. Two buttons are on this page, giving you the option to either add another incident , or to go to the Home screen .

Note: At any time, you may click the Cancel button . This will erase any data you have entered into the report.

Request an Officer

Please refer to Figure 3.1 when going through the following steps.

- Click the **Home** button .
- Click the **Request an Officer** button.
- Type your first name in the **First Name** field.

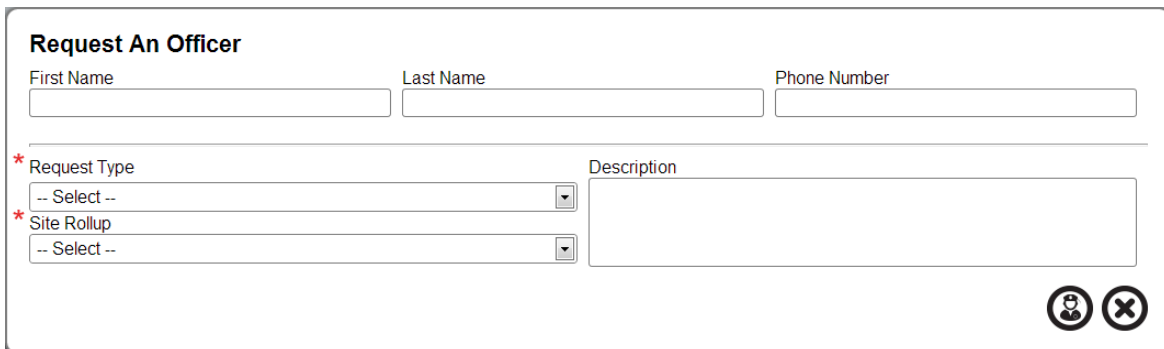





Figure 3.1: Request an Officer form

- Type your last name in the **Last Name** field.
- Type your phone number in the **Phone Number** field.
- Select the reason you are requesting an officer from the **Request Type** drop-down menu.
- Select your site rollup from the **Site Rollup** drop-down menu.
- In the **Description** field, type any details about why you are requesting an officer, or what you may need from him/her.
- Click the **Submit** button .
 - Required fields display with red asterisks ***** beside them. These fields must be filled out before the request can be submitted. Failure to fill out required fields will result in an error message.
 - Once you have requested an officer, you will be taken to a new page that tells you that your submission was successful, and the activity number will be given to you. Two buttons are on this page, giving you the option to either request another officer , or to go to the Home screen .

Note: At any time, you may click the Cancel button . This will erase any data you have entered into the request.

Portal Setup

Administrators install and set up Portal so that other users are able to access the webpage and report incidents and/or request officers. Once the Administrator has set up the company's various workgroups, designated users can log in to their Portal.

Administrators

Users cannot access Portal until an Administrator has installed the service and set up workgroups. The following steps explain how to do this:

1. Open an Internet browser.
2. Navigate to your Portal Services URL: **http://<IISServer>/PerspectivePortal**. <IISServer> refers to the web server installed during the installation of Portal.
 - The screen will notify you that the URL is no longer valid and that Portal is not set up (Figure 4.1).

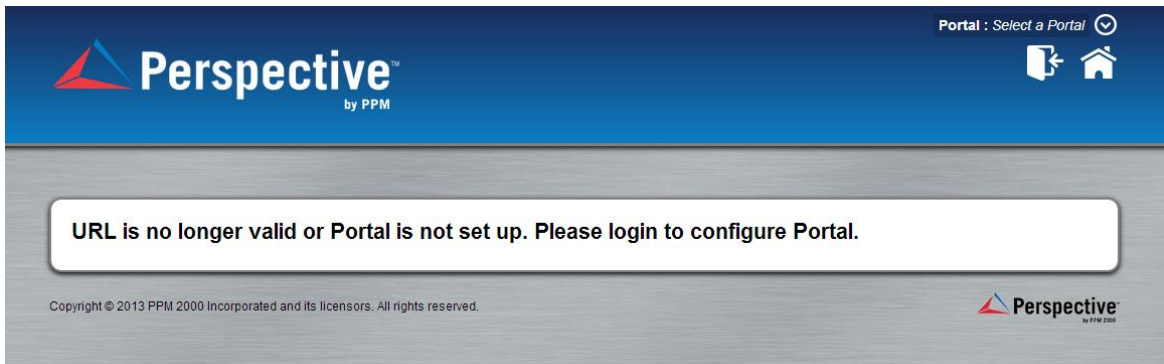






Figure 4.1: Setting up Portal

3. Click the **Login** button  at the top right of your screen.
4. Enter the **Business ID**, **Database Name**, **User Name**, and **Password**.
5. Click the **Login** button .
6. Click the **Manage** button .
7. Refer to the “**Manage**” chapter (pg. 13) for further instruction.

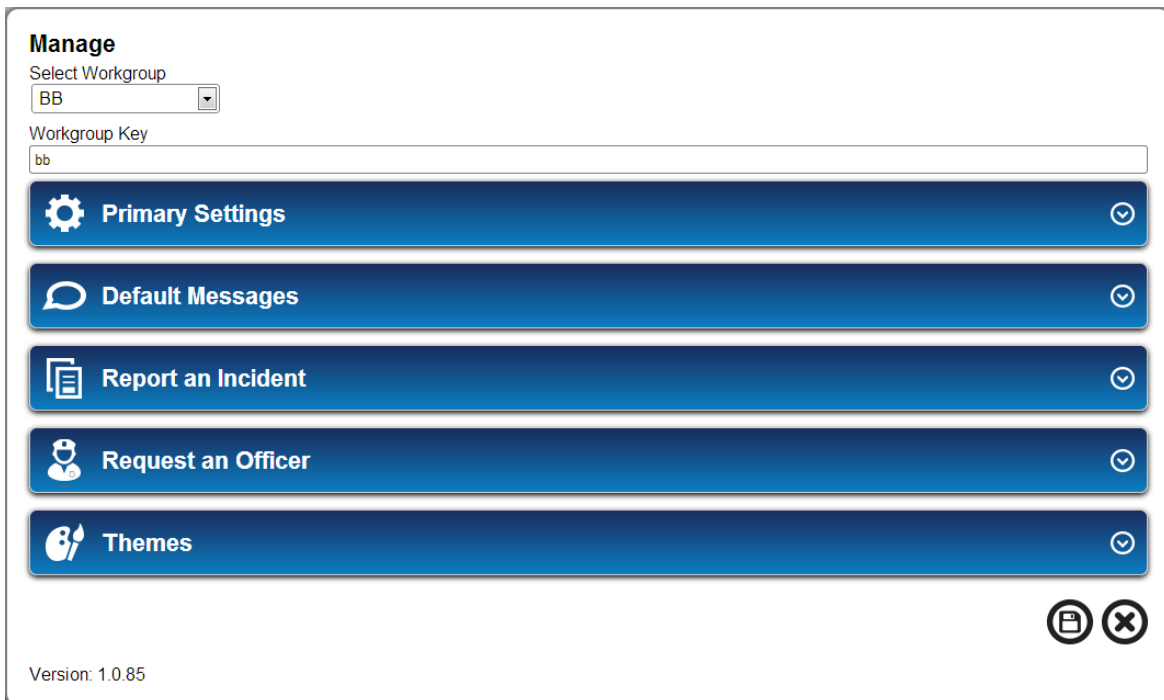
Manage

Portal Administrators set up each workgroup.

1. Click the **Manage** button .
2. Select the workgroup you want to configure from the drop-down menu.
3. Type the workgroup key in the **Workgroup Key** field.

Note: The Workgroup Key is configured in the Perspective Desktop Client. Refer to the “Specify Gateway File Import and/or e-Reporting Access Options for a Workgroup” section (pg. 75) in the Administrator’s Guide for further instruction.



4. Click the **Validate Key** button. If the key is correct, the Manage components will display (Figure 5.1).







Manage



Select Workgroup
BB



Workgroup Key
bb



 Primary Settings 

 Default Messages 

 Report an Incident 

 Request an Officer 

 Themes 




 

Version: 1.0.85

Figure 5.1: Setting up workgroups from the Manage page

Primary Settings

Please refer to Figure 5.2 when going through the following steps:

1. Click the **Manage** button .
2. Select the workgroup you want to configure from the drop-down menu.
3. Enter a title for the workgroup in the **Workgroup Title** field.
4. Only check boxes for the sections that you want visible to the workgroup: **Public Workgroup**, **Announcement Enabled**, **BOLO Enabled**, and **Links Enabled**.
5. You may decide to enable languages. This means that all labels will appear in the language you have chosen. To enable languages, click on the blank field, and select a language from the drop-down menu that appears.
6. Click the **Save** button  to save your changes, or the **X** button  to cancel your changes.

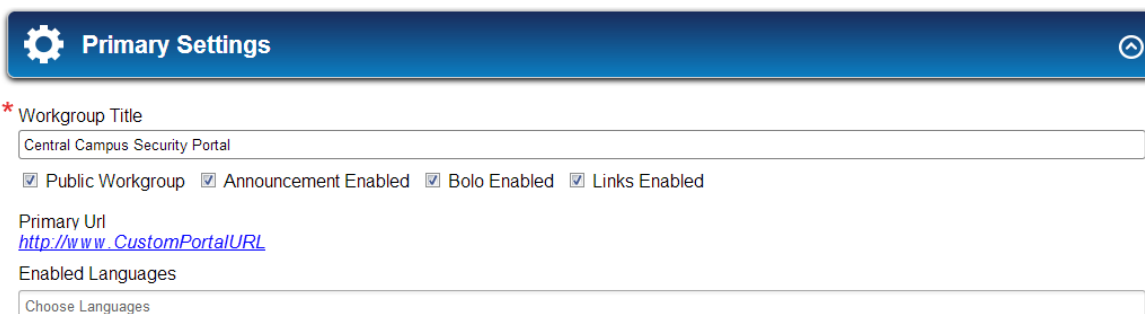






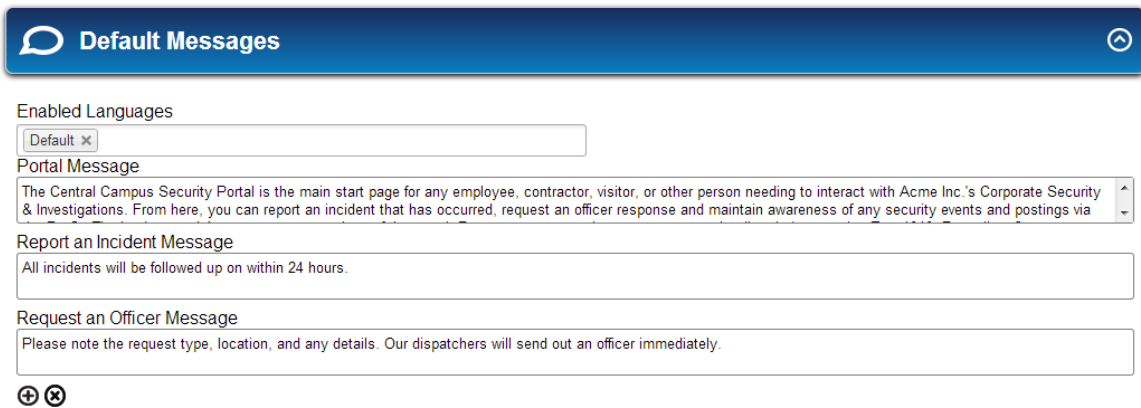
Figure 5.2: Primary Settings for workgroups in Portal

Note: The Workgroup URL is what you give to each workgroup in order for them to be able to access Portal. If languages have been enabled, an additional URL is available, which displays all labels in the set language. These URLs are unique to each workgroup.

Default Messages

Please refer to Figure 5.3 when going through the following steps:

1. Click the **Manage** button .
2. Select the workgroup you want to configure from the drop-down menu.
3. Expand Default Messages by clicking the **expansion** button .
4. Enable languages by clicking in the Enabled Languages field and selecting a language, or skip this step to leave it as Default.
5. Enter a **Portal Message**. This message displays at the top of the homepage, and can be used to direct users on how to navigate Portal.
6. Enter a **Report an Incident Message**. This message displays at the top of the report an incident page, and can be used to remind users to fill out all required fields, to notify them that there will be a follow-up to their report, etc.
7. Enter a **Request an Officer Message**. This message displays at the top of the request an officer page and can be used to remind users to fill out certain fields when requesting an officer, or perhaps to list an emergency contact number.
8. Click the **Save** button  at the bottom of your page to save your changes, or the **X** button  to cancel your changes.



Default Messages

Enabled Languages

Portal Message
 The Central Campus Security Portal is the main start page for any employee, contractor, visitor, or other person needing to interact with Acme Inc.'s Corporate Security & Investigations. From here, you can report an incident that has occurred, request an officer response and maintain awareness of any security events and postings via

Report an Incident Message
 All incidents will be followed up on within 24 hours.

Request an Officer Message
 Please note the request type, location, and any details. Our dispatchers will send out an officer immediately.







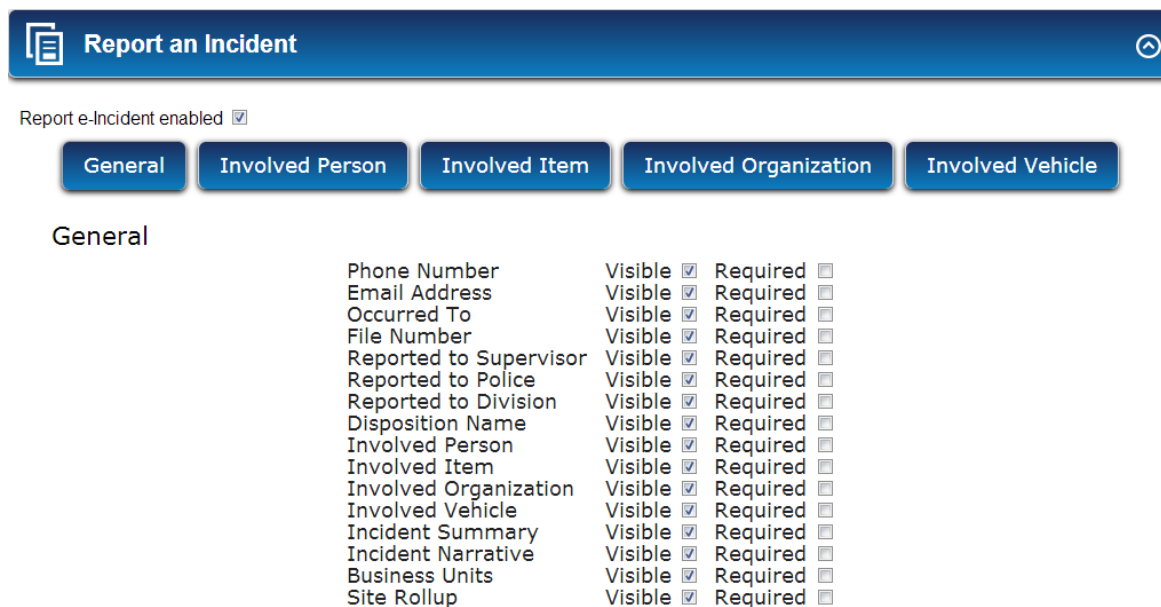
 

Figure 5.3: Setting the Default Messages in Portal

Report an Incident

Please refer to Figure 5.4 when going through the following steps:

1. Click the **Manage** button .
2. Select the workgroup you want to configure from the drop-down menu.
3. Expand Report an Incident by clicking the **expansion** button .
4. By default, the Report e-Incident enabled box is checked. If you do not want your users to be able to report an incident from Portal, deselect the box.
5. By default, the field privileges boxes are checked on Visible. To hide a field from a workgroup, deselect the **Visible** box.
6. If you want an incident field to be required, check the corresponding **Required** box. A field must be visible for it to be a required field.
7. Repeat steps 5 and 6 for the Involved Person, Involved Item, Involved Organization, and Involved Vehicle field privileges.
8. Click the **Save** button  at the bottom of your page to save your changes, or the **X** button  to cancel your changes.



Report e-Incident enabled

General Involved Person Involved Item Involved Organization Involved Vehicle

General



Phone Number	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Email Address	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Occurred To	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
File Number	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Reported to Supervisor	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Reported to Police	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Reported to Division	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Disposition Name	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Involved Person	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Involved Item	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Involved Organization	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Involved Vehicle	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Incident Summary	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Incident Narrative	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Business Units	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Site Rollup	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>

Figure 5.4: Determining which fields will be visible for users when reporting an incident

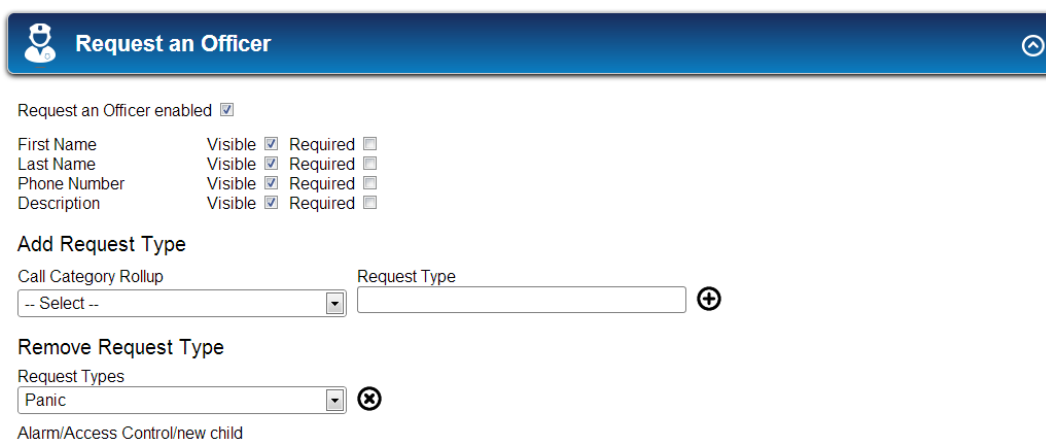
Request an Officer

Note: This feature should only be used by those who have the Perspective SOC or EIM edition. If you are not using Dispatching, PPM recommends you do not use this form.

Please refer to Figure 5.5 when going through the following steps:

1. Click the **Manage** button .
2. Select the workgroup you want to configure from the drop-down menu.
3. Expand Request an Officer by clicking the **expansion** button .
4. By default, the Request an officer enabled box is checked. If you do not want your users to be able to request an officer from Portal, deselect the box.
5. By default, First Name, Last Name, Phone Number, and Description are set to visible. This means that whoever requests an officer has the option to fill out their personal information, but do not have to do so. To hide a field from a workgroup, deselect the Visible box.
6. If you want an activity field to be required, check the corresponding Required box. A field must be visible for it to be a required field.
7. Choose the Call Category that you want the workgroup to report on from the drop-down menu.
8. Based on the Call Category that you have selected for the workgroup, enter an alias in the Request Type field. The alias is what users will see when requesting an officer in Portal.


Note: Call Category is only available in the drop-down menu if a Priority is set in the Perspective Desktop Client.




Request an Officer enabled

First Name	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Last Name	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Phone Number	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>
Description	Visible <input checked="" type="checkbox"/>	Required <input type="checkbox"/>

Add Request Type


Call Category Rollup: Request Type: 




Remove Request Type

Request Types: 

Alarm/Access Control/new child

Figure 5.5: Determining which fields will be visible to users when requesting an officer

9. To add a request type, click the **add** button .
10. Repeat steps 7-9 for additional Request Types.

11. To remove a request type, click the **X** button .
12. Click the **Save** button  at the bottom of your page to save your changes, or the **X** button  to cancel your changes.

Themes

Please refer to Figure 5.6 when going through the following steps:





1. Click the **Manage** button .
2. Select the workgroup you want to configure from the drop-down menu.
3. Expand Themes by clicking the **expansion** button .
4. To change the logo that appears at the top of the Portal screen, click the **Choose File** button.
5. Browse to the location of your file, and click **Open**.
6. Click the **Save** button  at the bottom of your page to save your changes, or the **X** button  to cancel your changes.



Figure 5.6: Uploading a logo

BOLOs, Announcements, and Links

Only those with Administrator rights can add, edit, or delete BOLOs, Announcements, and Links.

1. **BOLOs:** The BOLOs (Be on the Lookout) area is where thefts, stolen items, vandalized vehicles, etc. appear, so that those using Portal know what to be aware of.
2. **Announcements:** The Announcements area is where any upcoming events or changes can be posted.
3. **Links:** The Links area is used for internal websites, such as your company's website, events, and/or contact lists.

Add BOLOs

Please refer to Figure 6.2 when going through the following steps:








1. Click the **Home** button .
2. Click the **plus** button  on the bottom right of the BOLOs area.
3. Make sure **BOLO** is selected from the Announcement Type drop-down menu.
4. Enter a title for your BOLO in the **Title** field.
5. Optionally, you can enter a link in the **Link** field.
6. Enter the message you want displayed in the **Message** field.
7. Optionally, you can upload an image to be displayed with the BOLO announcement.
8. Select the **Expiry Date** (the date you no longer want the BOLO to be displayed) in one of the following three ways:
 - a. Type the date.
 - b. Click on the month, day, and year fields, and change them by clicking the corresponding **up** and **down** arrows .
 - c. Click the **down** arrow  and select the expiry date from the pop-up calendar.
9. Select the workgroups you want the announcement to be visible to by clicking the **Announcement Visible to Workgroups** field and selecting the workgroups from the drop-down menu.



Figure 6.2: Adding a BOLO

10. Select the languages you want the announcement to be available in by clicking the **Announcement Visible to Languages** field and selecting the languages from the drop-down menu.
11. Click the **Submit** button .
 - Required fields display with red asterisks ***** beside them. These fields must be filled out before the BOLO can be submitted. Failure to fill out required fields will result in an error message.
 - Once your BOLO has been submitted, you will be taken to a new page that gives you the option to either add another BOLO , or to go to the Home screen .

Note: At any time, you may click the Cancel button . This will erase any data you have entered into the BOLOs area.






Add Announcements

Please refer to Figure 6.1 when going through the following steps:

1. Click the **Home** button .
2. Click the **plus** button  on the bottom right of the Announcements area.
3. Make sure **Announcement** is selected from the Announcement Type drop-down menu.

4. Enter a title for your Announcement in the **Title** field.
5. Optionally, you can enter a link in the **Link** field.
6. Enter the message you want displayed in the **Message** field.





Figure 6.1: Adding an Announcement

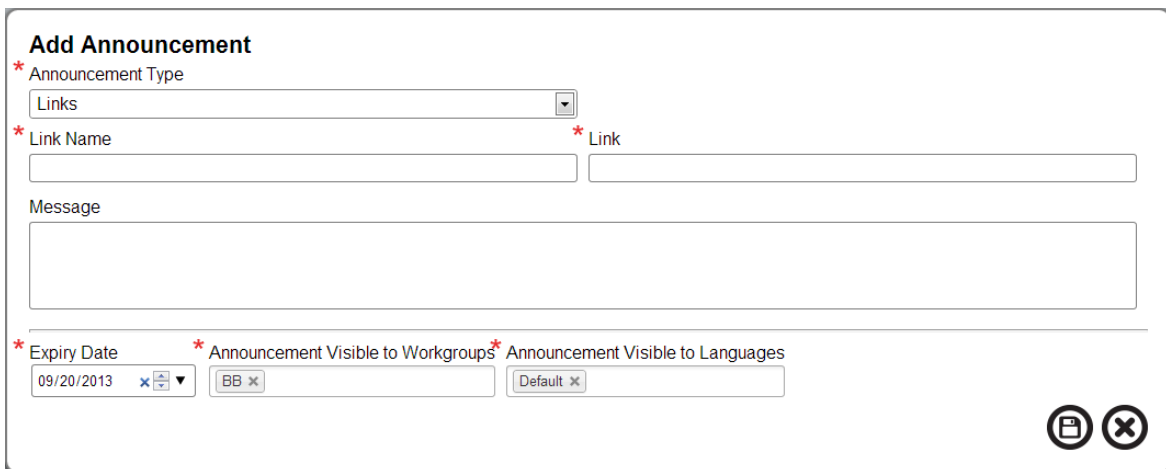
7. Select the **Expiry Date** (the date you no longer want the Announcement to be displayed) in one of the following three ways:
 - d. Type the date.
 - e. Click on the month, day, and year fields, and change them by clicking the corresponding **up** and **down** arrows .
 - f. Click the **down** arrow  and select the expiry date from the pop-up calendar.
8. Select the workgroups you want the announcement to be visible to by clicking the **Announcement Visible to Workgroups** field and selecting the workgroups from the drop-down menu.
9. Select the languages you want the announcement to be available in by clicking the **Announcement Visible to Languages** field and selecting the languages from the drop-down menu.
10. Click the **Submit** button .
 - Required fields display with red asterisks ***** beside them. These fields must be filled out before the announcement can be submitted. Failure to fill out required fields will result in an error message.
 - Once your announcement has been submitted, you will be taken to a new page that gives you the option to either add another announcement , or to go to the Home screen .

Note: At any time, you may click the Cancel button . This will erase any data you have entered into the Announcements area.

Add Links

Please refer to Figure 6.3 when going through the following steps:

1. Click the **Home** button .
2. Click the **plus** button  on the bottom right of the Links area.
3. Make sure **Links** is selected from the Announcement Type drop-down menu.
4. Enter a title for your Link in the **Title** field.
5. Enter a link in the **Link** field.
6. Optionally, you can enter a message to be displayed under the link.
7. Select the **Expiry Date** (the date you no longer want the Link to be displayed) in one of the following three ways:
 - a. Type the date.
 - b. Click on the month, day, and year fields, and change them by clicking the corresponding **up** and **down** arrows .
 - c. Click the **down** arrow  and select the expiry date from the pop-up calendar.






The screenshot shows a form titled "Add Announcement". It contains the following fields and controls:

- Announcement Type:** A dropdown menu with "Links" selected.
- Link Name:** A text input field.
- Link:** A text input field.
- Message:** A large text area for entering a message.
- Expiry Date:** A date picker showing "09/20/2013" with up/down arrows and a calendar icon.
- Announcement Visible to Workgroups:** A dropdown menu with "BB" selected.
- Announcement Visible to Languages:** A dropdown menu with "Default" selected.
- At the bottom right, there are two circular icons: a save icon and a cancel icon.




Figure 6.3: Adding a Link


8. Select the workgroups you want the announcement to be visible to by clicking the **Announcement Visible to Workgroups** field and selecting the workgroups from the drop-down menu.

9. Select the languages you want the announcement to be available in by clicking the **Announcement Visible to Languages** field and selecting the languages from the drop-down menu.
10. Click the **Submit** button .
 - Required fields display with red asterisks * beside them. These fields must be filled out before the link can be submitted. Failure to fill out required fields will result in an error message.
 - Once your link has been submitted, you will be taken to a new page that gives you the option to either add another link , or to go to the Home screen .



Note: At any time, you may click the Cancel button . This will erase any data you have entered into the Links area.

Edit Announcements, BOLOs, and Links

1. Click the **Home** button .
2. Click the **edit** button  to edit an announcement, BOLO, or link.
3. Make your changes.
4. Click the **Submit** button .
 - Required fields display with red asterisks * beside them. These fields must be filled out before the incident can be submitted. Failure to fill out required fields will result in an error message.

Note: At any time, you may click the Cancel button . This will erase any data you have entered into the Announcements, BOLOs, or Links area.

Delete Announcements, BOLOs, and Links

1. Click the **Home** button .
2. Click the **delete** button  to delete an announcement, BOLO, or link.

Glossary

Administrator	An Administrator sets up Perspective Portal, 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.
Announcements	The Announcements area of Portal is where any upcoming events or changes will be posted. It appears on the homepage of Portal.
BOLOs	The BOLOs (Be on the Lookout) area of Portal is where thefts, stolen items, vandalized vehicles, etc. appear, so that those using Portal know what to be aware of. It appears on the homepage of Portal.
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.
Field	A field is an element within a form that allows you to enter or access a specific piece of information related to the record type. One field might be “First Name”.
Home	Home refers to the main screen of Portal. From Home, you access Report an Incident, Request an Officer, Announcements, BOLOs, and Links.
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.
Interface	Interface in Perspective Portal refers to the visual on-screen means by which Perspective components communicate with the user to allow for a seamless entry, display, analysis, and transfer of data.
Links	The Links area of Portal is used for internal websites, such as your company’s website, events, and/or contact lists. It appears on the homepage of Portal.

Workgroup

A workgroup, in Perspective, segregates users by department, division, corporate level, region, or any other criteria an organization wants to use, and allows an organization to limit users' access to data. Administrators set up workgroups in Portal.

Contact Information

Technical Support

Toll Free: 1-877-776-2995
Phone: (780) 448-0616
Email: support@ppm2000.com

PPM 2000

Toll Free: 1-888-PPM-9PPM (1-888-776-9776)
Phone: (780) 448-0616
Fax: (780) 448-0618
Email: information@ppm2000.com
Website: www.ppm2000.com

WHEN YOU THINK 'INCIDENT MANAGEMENT' — THINK PPM.
www.ppm2000.com

Copyright © PPM 2000 Inc. All rights reserved. PPM 2000, the PPM 2000 logo, Perspective by PPM 2000, the Perspective by PPM 2000 logo, Perspective by PPM, the Perspective by PPM logo and Perspective Focal Point are trademarks or registered trademarks of PPM 2000 Inc. Printed in Canada 09/13.

