Perspective™

by PPM 2000

Incident management from every angle.™

User's Guide

Perspective by PPM 2000™

Version 3.3

Printed April 2013

Contents

Welcome to Perspective by PPM 2000

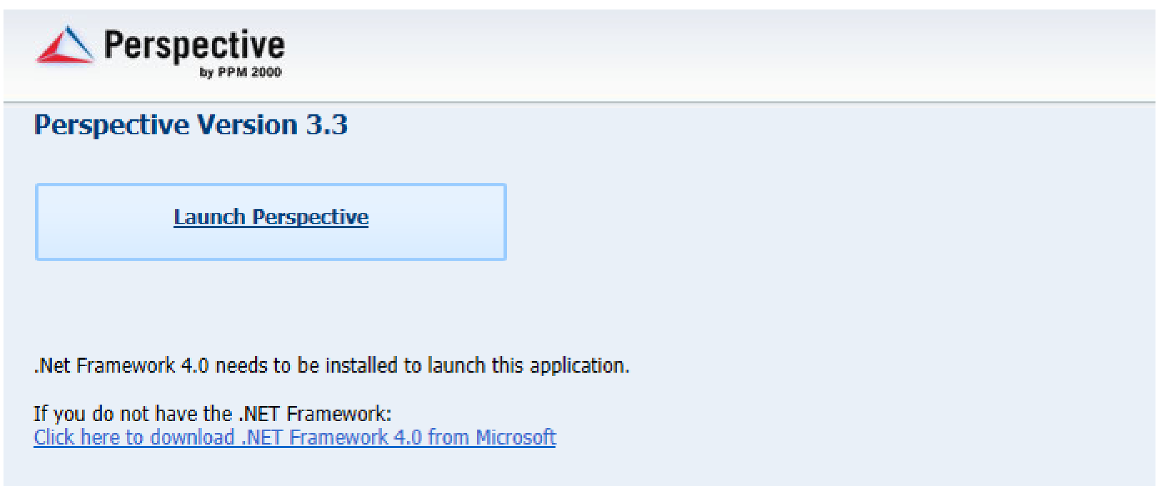
Welcome to Perspective by PPM 2000™, the industry leader in Incident Reporting and Investigation Management software. Perspective not only records, tracks and fully investigates incident data, but assesses and analyzes it to chart trends and report statistics. With the recent incorporation of the centralized dispatching tool Perspective DispatchLog™, Perspective now also offers an extensive range of dispatching capabilities.

Note: Investigation management is only available in the Premium Edition of Perspective.

Perspective is available in two editions—Premium and Standard—offering just the right level of functionality for your incident management needs. Some features and functionality discussed in this guide are only available in the Premium Edition; such exceptions are specifically identified throughout this document. All screenshots reflect the Premium Edition 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.

Accessing Perspective

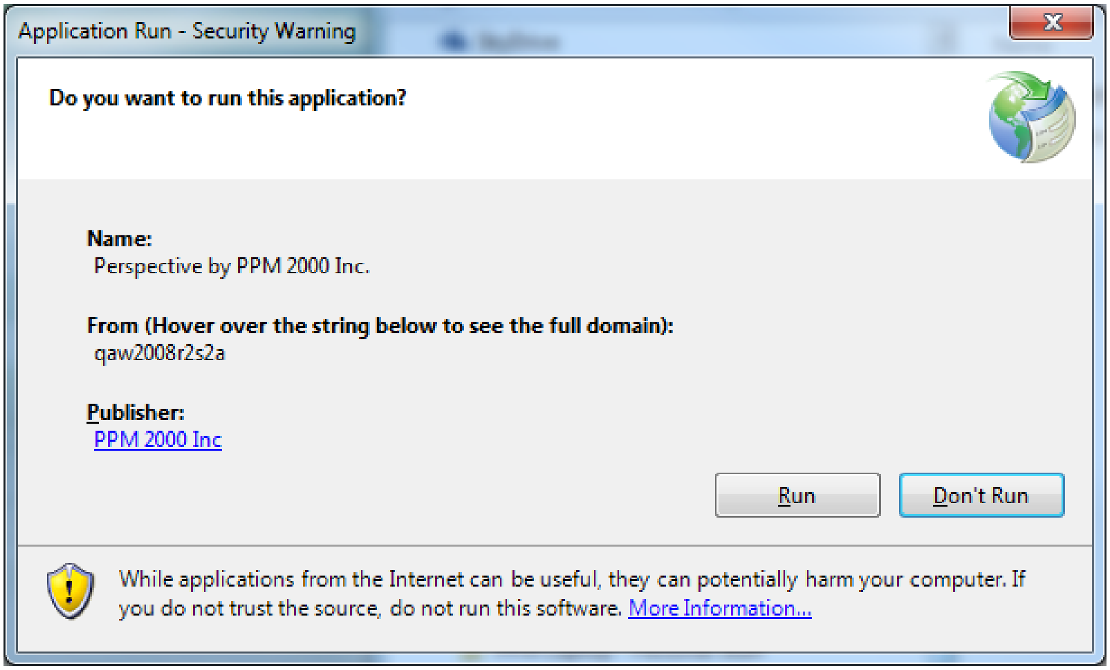
1. In order to access Perspective, navigate to your Perspective Services URL: **http://<IISServer>/PerspectiveServices**. <IISServer> refers to the Perspective Web server installed during the installation of Perspective.

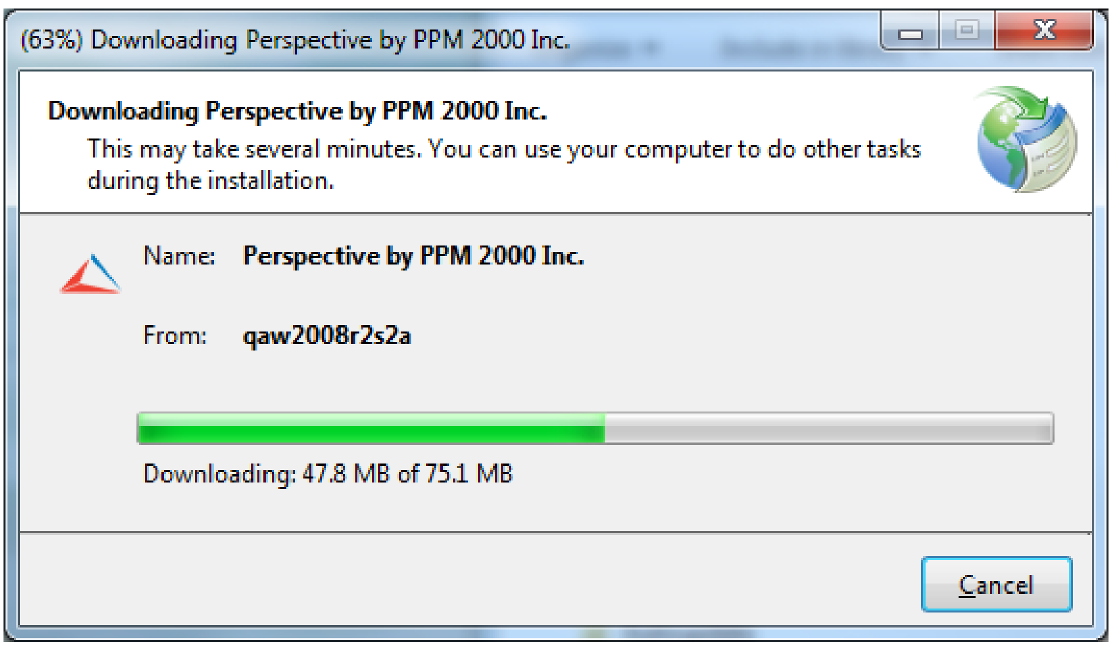


2. Click the **Launch Perspective** button.

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

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





b. After Perspective downloads and installs, you're prompted to enter a URL. The URL should be automatically populated; if so, move to the next step. If not, 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  icon right of the URL.

4. Once connected, a Logon window will appear. Enter the **User Name** and **Password** assigned to you by your Administrator. Note that if your system uses Windows® authentication, the login will be performed automatically. To switch back to the standard Perspective login, press the <F5> key on your keyboard.

5. Click the **Logon** button.

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

1. Navigate to the Perspective Services URL.

2. Right-click the **Launch Perspective** button and select **Copy Shortcut**.

3. Right-click the client desktop, and select **Paste Shortcut**.

User Interface

Perspective’s user interface is interactive, which means that it is constructed essentially to match the current working process (e.g., creating a record, analyzing data, filing a report, etc.). Although there are parts of the screen that remain constant (i.e., the standard icons of the Ribbon and the components of the Navigation pane), the rest of the screen content changes depending on the currently active Perspective’s 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 that 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.

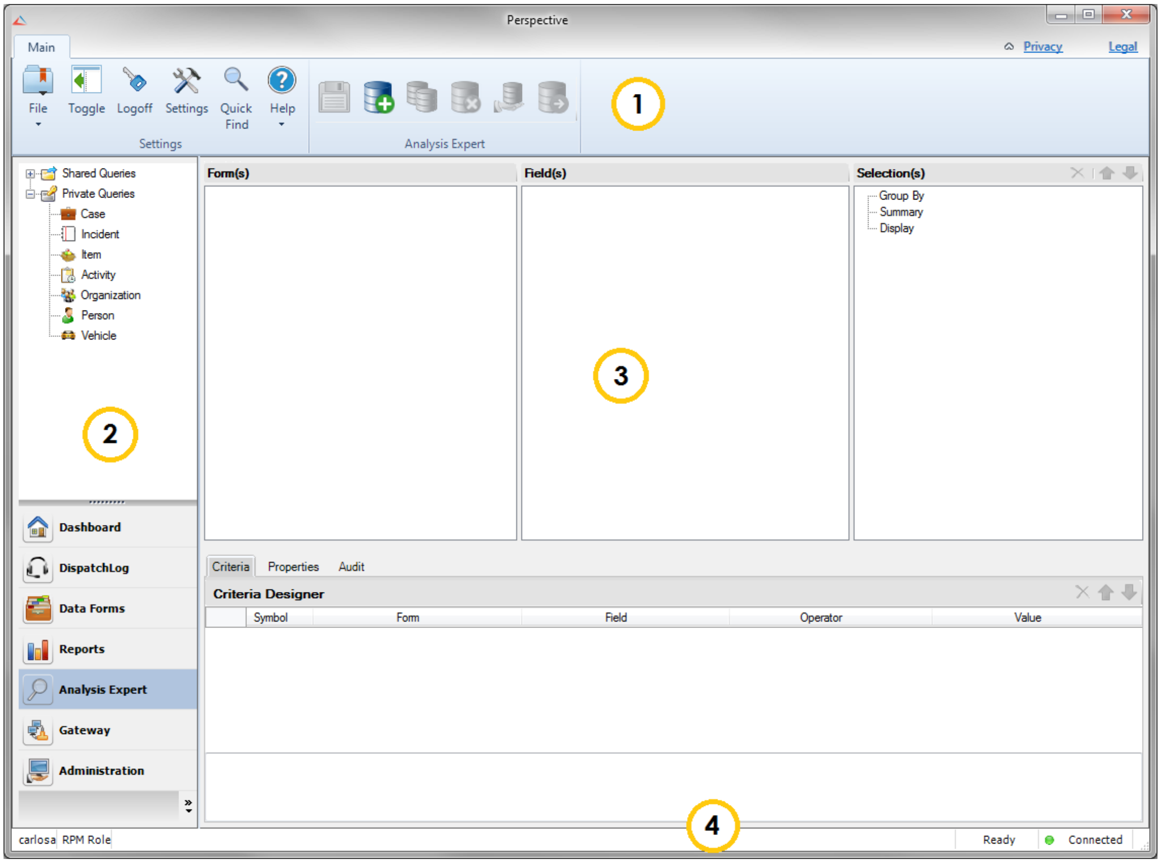
   Hide the Ribbon by clicking the icon on the top right corner (next to the Privacy link). Click again to show.

   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, specify query settings, etc.). To hide the Navigation pane, click the **Toggle Navigation Window** icon on the Ribbon. Click it again to make the pane re-appear.

3. **Main screen**: Depending on the currently active component, consists of one or more sections and displays the core record data stored in Perspective. 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, etc.) and also specify if an action is complete and successful (e.g., “Record is successfully saved”) or unsuccessful (e.g., “Please provide required fields before saving”).



Main System Components

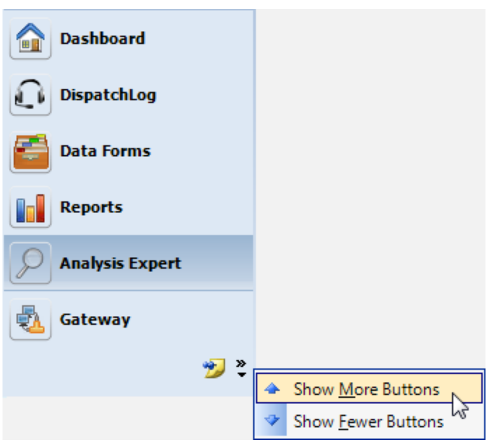
You can access all of Perspective's features and functionality from the Navigation pane. Just click on the buttons to switch between components, and then further explore each component by clicking on the options displayed.

Note: The components any particular user sees is dependent on that user's privileges and access rights. Refer to User Privileges and Access Rights 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 *Perspective DispatchLog* section for a complete description of dispatching procedures.
Data Forms	Enter, update and review your Activity, Incident, Case (Perspective Premium only), Item, Person, Organization and Vehicle records in Data Forms.

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 *Perspective Administrator's Guide*.

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



User Privileges and Access Rights

Every Perspective user's visibility and access rights are customized by the specialized user or users designated as the program's *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 Perspective Premium, or the Controls tab). Furthermore, these basic users may be restricted from such advanced components, 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

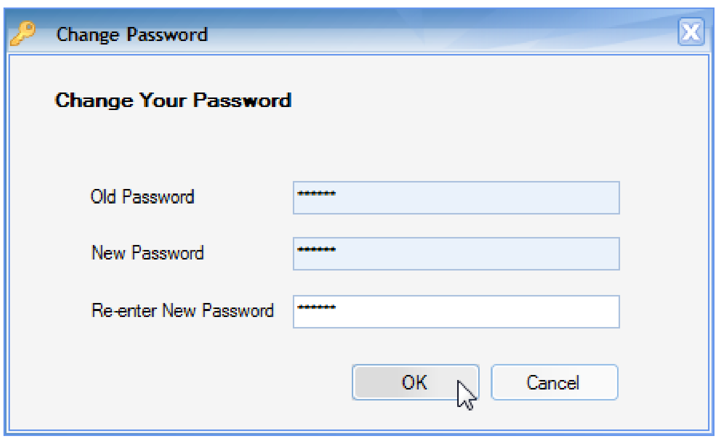
Changing password

1. To initiate the change of your current account password, click on the **File** icon on the Ribbon and select **Change Password**.

2. In the dialog window, enter your **Old Password** and your **New Password**.

3. Re-enter your new password in the field below to confirm the password configuration.

4. Click **OK** to save the change and verify the new password.



Dashboard settings

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

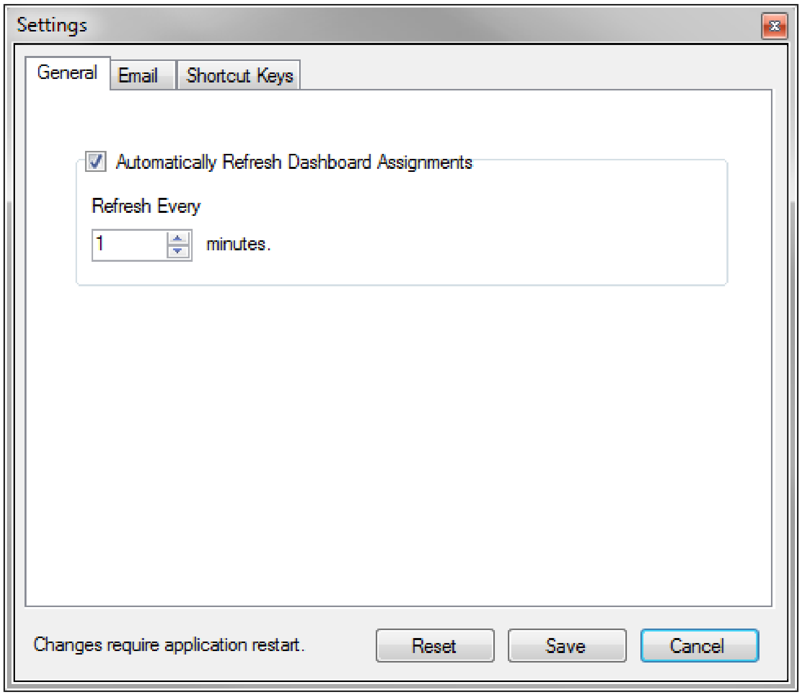
1. Click the **Settings** icon on the Ribbon. The Settings window will open with the General tab open by default.

2. To modify how often your Dashboard refreshes, ensure the **Automatically Refresh Dashboard Assignments** box is checked, and in the field below, specify how frequently you would like the Dashboard to refresh (from once every minute to once every 60 minutes).

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

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

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



Email settings

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

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

2. Select the **Email** tab.

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

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

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

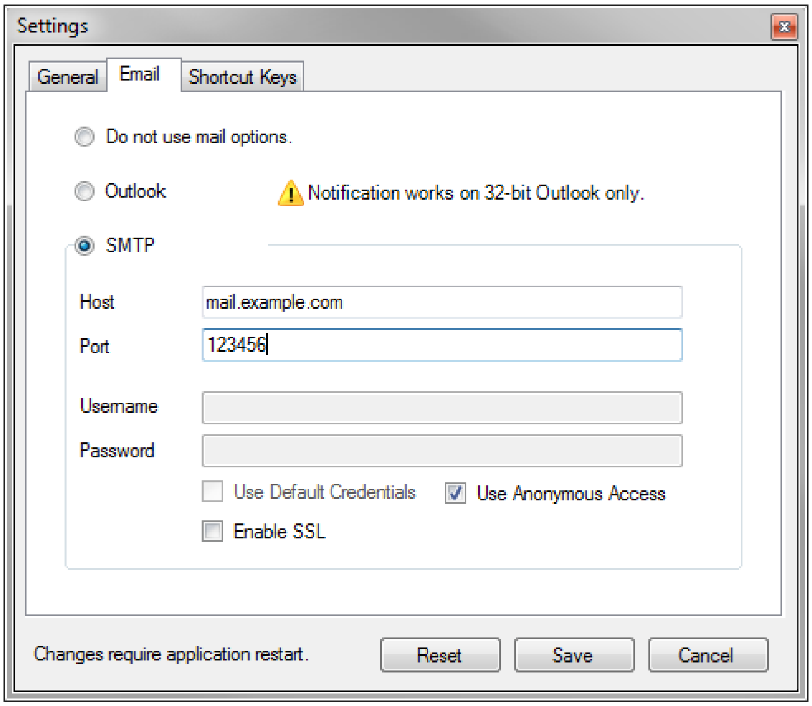
   a. Enter your **Host** and **Port** information.

   b. Specify your **Username** and **Password**, or check the **Use Default Credentials** box. Alternatively, check the **Use Anonymous Access** box to send email messages without any user credentials.

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

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

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



Shortcut keys

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

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

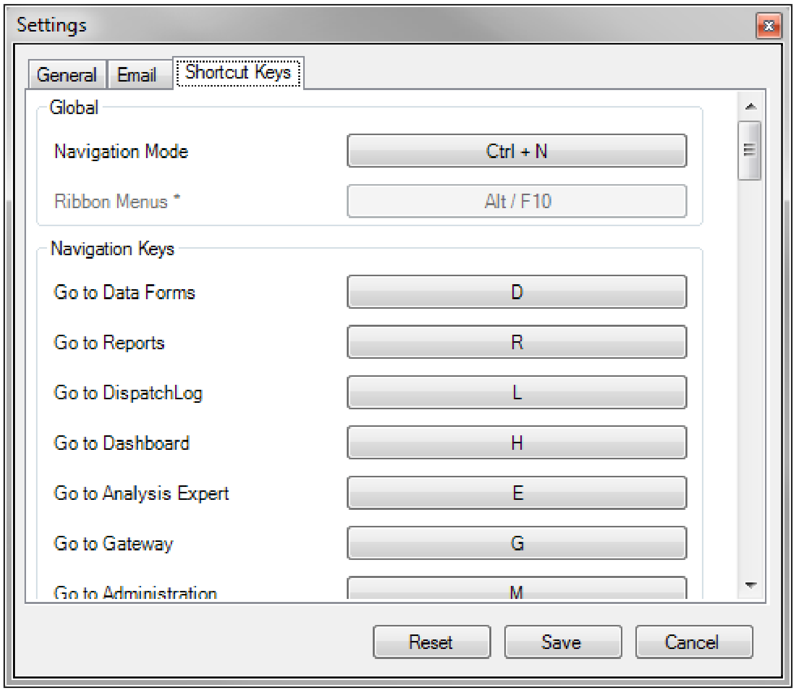
2. Select the **Shortcut Keys** tab.

3. For every key you want to change:

   a. Click the function's button.

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

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



The default settings for shortcut keys are as follows:

Function Name	Default Key Combination
Global	
Navigation Mode	Ctrl + N
Navigation Keys	
Go to Data Forms	D
Go to Reports	R
Go to DispatchLog	L
Go to Dashboard	H
Go to Analysis Expert	E
Go to Gateway	G
Go to Administration	M
Go to Activities	A

Go to Incidents	I
Go to Cases	C
Go to Items	S
Go to Persons	P
Go to Organizations	O
Go to Vehicles	V
List All Records	W
Open Quick View	Q
Show Saved Views	K
Focus on List Pane	F
Hide List Pane	Y
Change Password	1
Exit Perspective	2
Admin Help	8
User Help	9
Toggle Navigation Pane	3
Logoff	4
Settings	5
Quick Find	6
Open Visual Analysis	7
About Perspective	0
Hide Ribbon Menu	Minus

View Legal Notice	F3
View Privacy Policy	F2
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

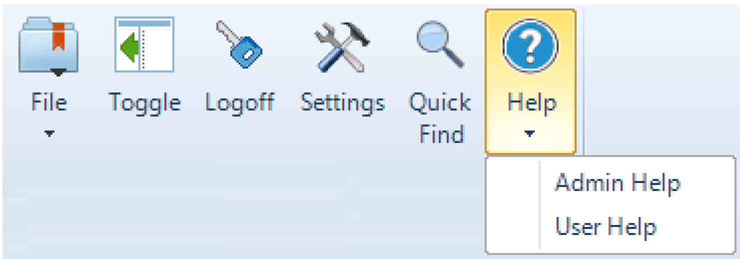
Last Page	Ctrl + Down Arrow
Previous Page	Ctrl + Left Arrow
First Page	Ctrl + Up Arrow
Jump to Page	Ctrl + 1
Focus on Selected Record	Ctrl + L
Add *	Ctrl + Plus
Edit *	Ctrl + E
Focus on Details Tabs *	Ctrl + F
Delete *	Ctrl + Minus
Controls	
Link Record: Open List	Ctrl + W
Link Record: Quick View	Ctrl + 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 will explain how to use program features, identify windows and fields, and answer common questions. Finding the specific information you are looking for is easy.

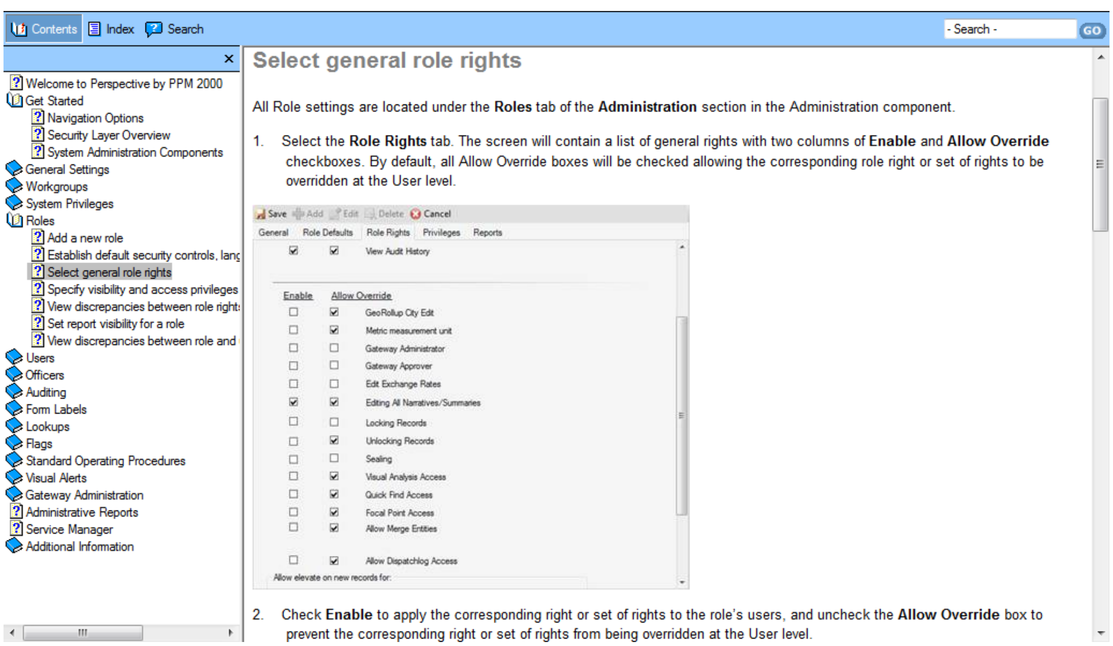
- To open one of the available Help files, click the **Help** icon located on the Ribbon. Click on **User Help** to access general Help files. Select **Admin Help** to access Administrator-specific Help files (requires appropriate permissions).



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

Contents Tab: Browse Help by topic

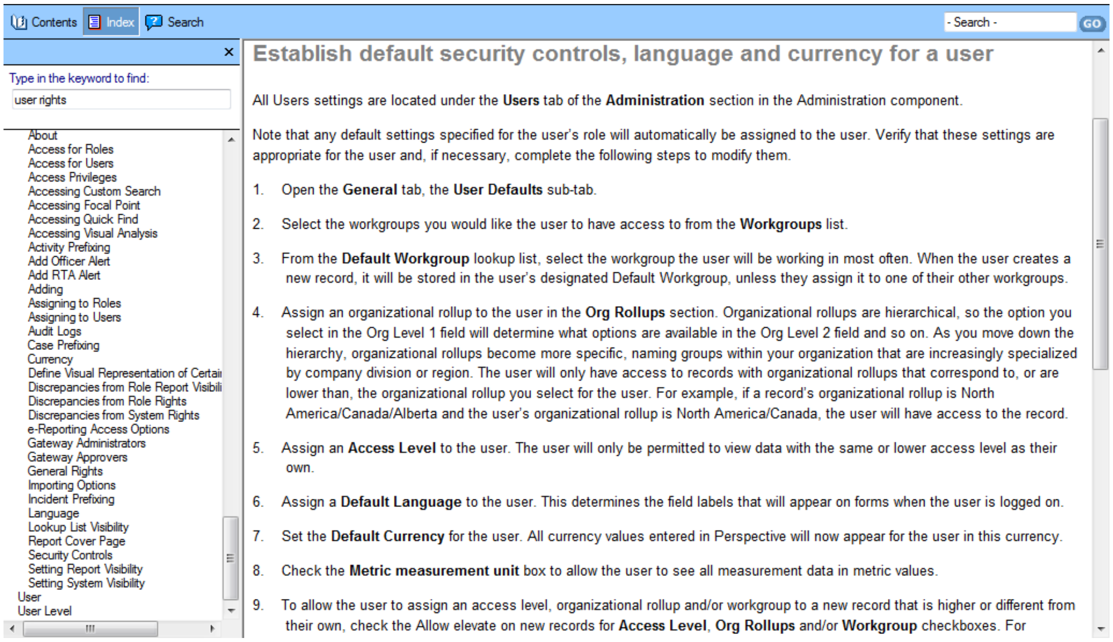
1. Click a **Contents** button to open it and view the chapters and pages contained within.
2. Then click a page icon to fill the Viewing pane with information on the selected subject.



Index Tab: Browse Help via Index

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

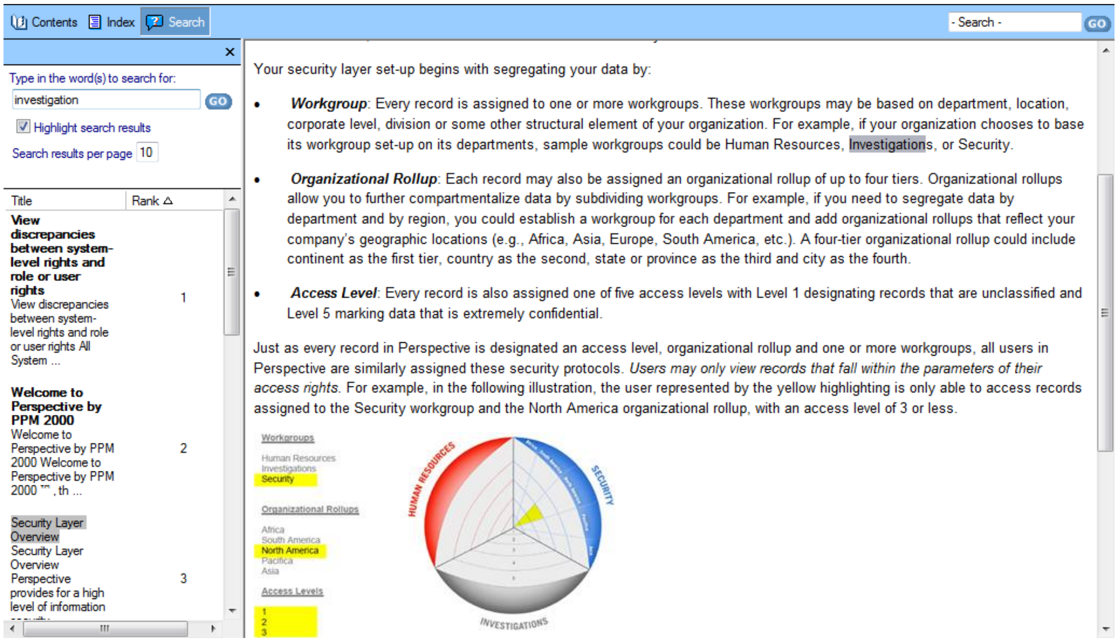
2. Click a keyword from the list to display the associated topic.



Search Tab: Search Help

1. Type a word or phrase and click the **Go** button. Perspective Help will list topics containing the word or phrase below.

2. Click the topic you want to display. The topic will appear in the Viewing pane.



Quick Find Tool

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

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

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

2. In the **Enter Search String** field, type the text that you wish to find. To ensure that your search returns accurate results, please consider the following tips:

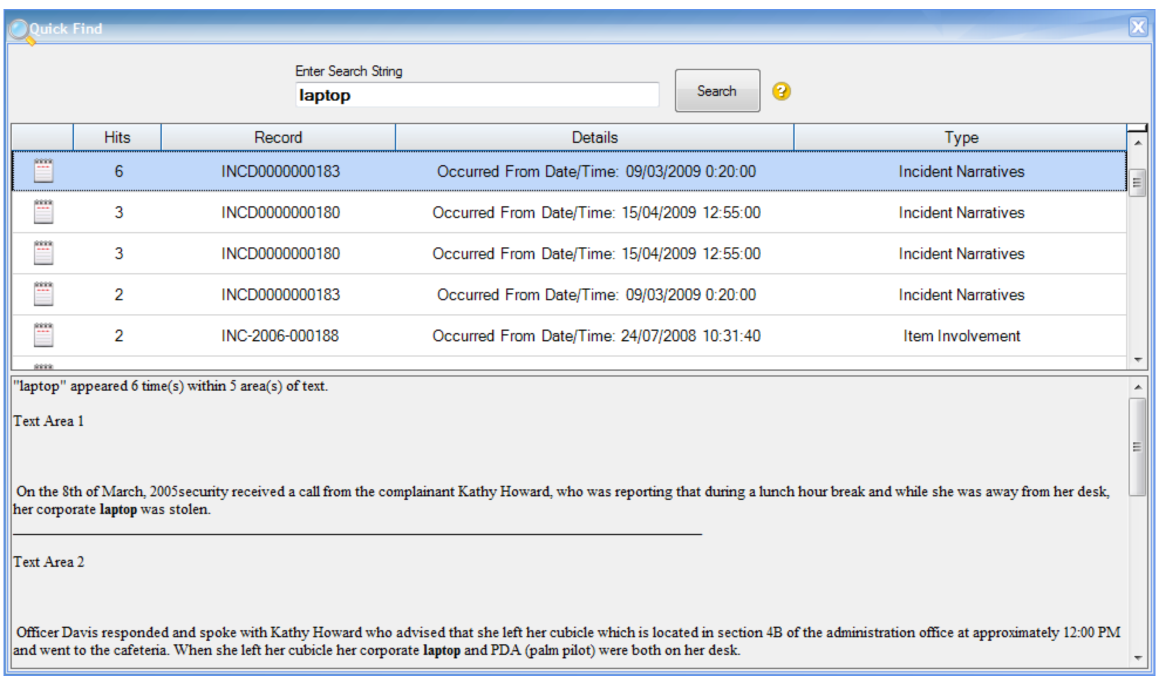
   - To search for an exact matching phrase, enclose it in quotation marks.

   - 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, etc.).
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.)



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 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 guide, 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 would require a full system reload upon the next login. To exit Perspective, simply 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.

Note: Before exiting Perspective (regardless of which exit option you choose), you have to press the ***Save*** *button to save any changes you have made to the 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 completion.

- 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 simple 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.

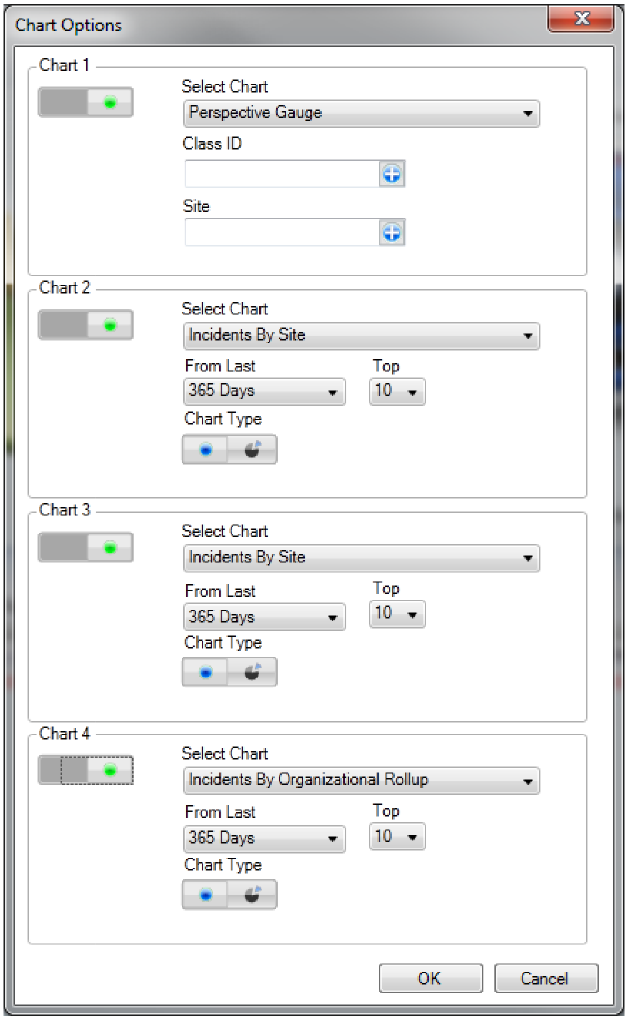
   - **Class ID:** Restrict your data to a specific Class, making it as narrow as necessary. Click the plus icon next to the Class ID field and select the required number of class levels (i.e., Class/Category/Subcategory/Type) by which you would like to restrict the data in the chart.

   - **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 wish to display your data for (e.g., 2011)

   - **Chart Type**: Choose either the Pie or the Bar chart type.



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

6. At any time, you may change the chart options for each individual chart displayed on the Dashboard by clicking the corresponding **Settings** icon . This will open the options window for the chart that you chose to modify.

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

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

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

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

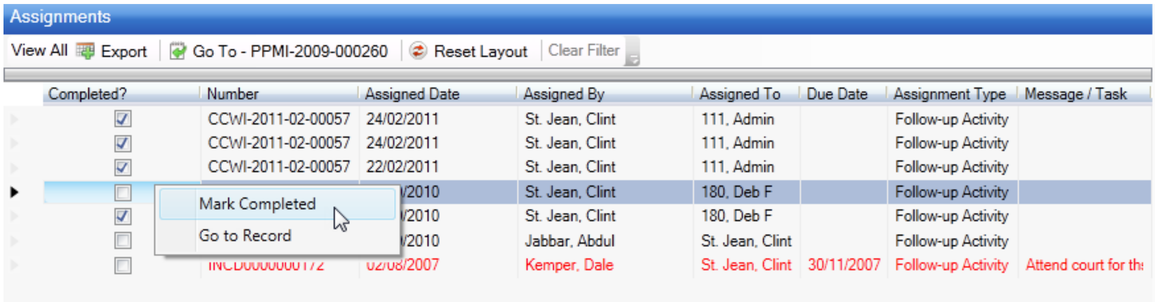
Assignments

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

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

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

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



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

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

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

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

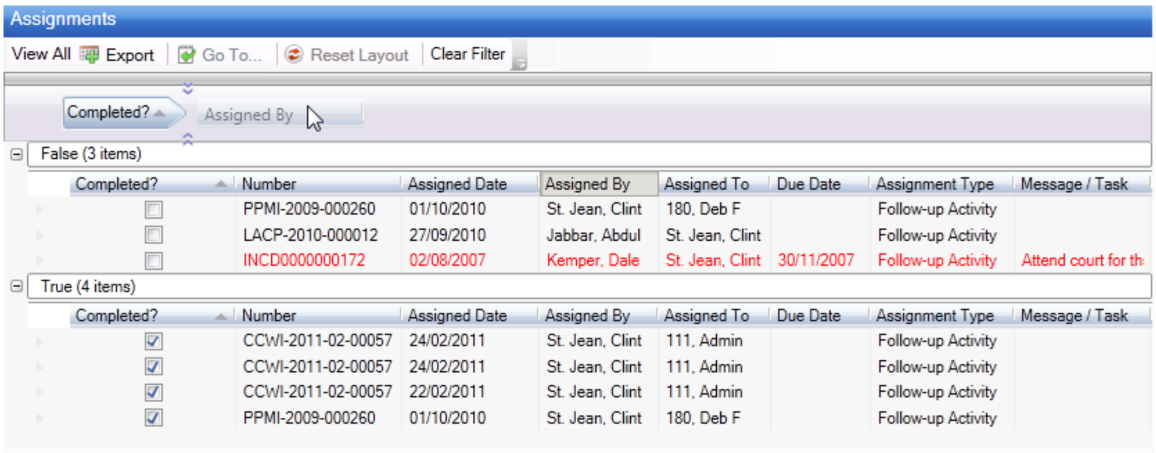
- By default, only incomplete assignments will appear in the Assignments section of the Dashboard. To display all assignments, completed and incomplete, click **View All**. Click View All again to hide completed assignments.

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

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

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

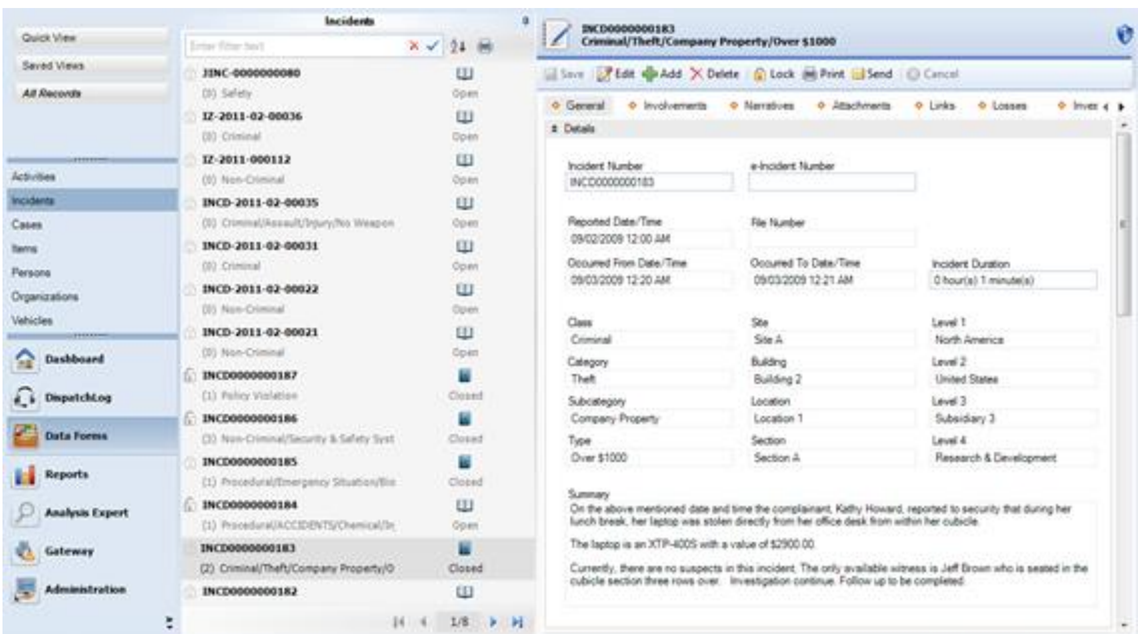


Data Forms

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

User Interface

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

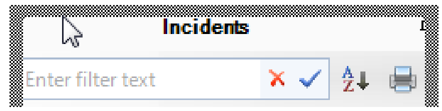


1. **Navigation pane**: Allows you to move between the various data forms (e.g., Activities, Incidents, Items, etc.) at any time. To display a particular record subset in the middle Listing pane, choose a data form from the Navigation pane and select your record view (i.e., specify a Quick View, view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

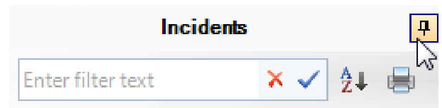
2. **Listing pane**: Provides a list of records that are available for viewing. Once you select a record in the Listing pane, the corresponding record information will be displayed in the Viewing pane on the right.

* The Case component is only available in the Premium Edition of Perspective.

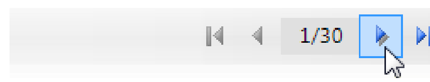
Change the orientation of the current component's (e.g., Incidents) Listing pane by dragging it to a different part of the screen. Display the pane in a separate dialog by double-clicking it or dragging it outside of the screen. To dock it back in, double-click the pane.



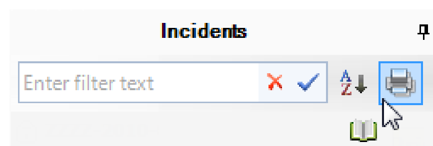
To hide the Listing pane, click the Auto Hide pin icon. Once the pane is hidden, access it by clicking the pane's newly-created shortcut button on the left side of the screen and "unpin" it by clicking the pin icon again.



If Perspective displays a list of entities (e.g., incidents, persons, etc.) 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 or the last arrow icons respectively.



To print the record list as it appears in the Listing pane, click the **Print** button located at the top of the Listing pane.

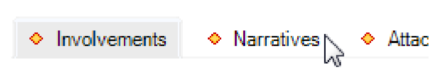


3. **Viewing pane**: Displays information of a record selected in the Listing pane and provides options for saving, editing, adding, deleting, (un)locking, printing, sending, and merging individual records.

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

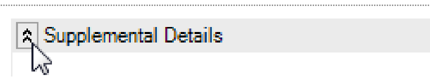
Every record consists of a set of customized forms and sub-forms designed specifically for the data form type. For example, a Person record contains a separate Contact(s) tab, which is absent in such data forms, as Vehicles or Items.

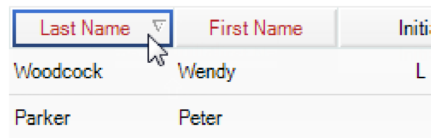
To view a particular segment of a selected record (e.g., Narratives), click the appropriate tab at the top of the record. The diamond symbol appearing on a tab indicates that the tab contains data. Tabs without the diamond symbol contain no saved data.



View more tabs. If these arrows appear next to a row of tabs in a form, there are more tabs available than are currently visible on-screen.

Expand or collapse a section to view or hide its contents.



To re-size a grid column, place the cursor between column headings. When an arrow appears, drag the column border to the desired width. To re-size a column to fit its content, double-click the border of the column.	
To re-order the grid columns, drag the column heading to a new position. Drop it into place once the thick arrows have appeared pointing to the correct spot.	
To sort the grid data by a particular column, click the column heading once. Click it again to sort the data in reverse order.	

Workflow Overview

The workflow in the Data Forms component is a logically flowing four-step process:

1. Every data entry/editing action in Data Forms requires you to first choose one data form type in which you intend to work: **Activities**, **Incidents**, **Cases** (Perspective Premium only), **Items**, **Persons**, **Organizations** or **Vehicles**. 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 manage activities imported from DispatchLog (refer to the *Perspective DispatchLog* section for more information). Before creating a new record, do a record search to ensure that the information has not already been entered.

General

- Specify the category, priority and location of the dispatched activity.
- Track the times of the dispatching progress.
- Identify the persons directly involved in the processing of the activity.
- Fill in the user-defined fields required by your organization.
- Post notes on the activity tracking progress.

Responses

Officer Responses

- View, create a new or edit the details of an existing officer response to the selected activity.

Organization Responses

- View, create a new or edit the details of an existing organization response to the selected activity.

Requests

- Note an action request sent to an organization in response to the selected activity.

Involvements

Persons

- Identify all persons involved in the activity.
- Record injuries sustained during the activity.
- Flag the involved person.

Organizations

- Identify all organizations involved in the activity.

Vehicles

- Document all vehicles involved in the incident.

Items

- Identify all items involved in the incident.

Attachments

- Attach a file to the Activity record.

Links

Activity Links

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

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 Premium 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 (Perspective Premium 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 consequent 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 of user permissions.

Cases form (Perspective Premium 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.

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 of 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.

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 of 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 and do not have a name. Before creating a new record, do a record search to ensure that the information has not already been entered.

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 of 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.

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

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

Common record functions

Although most data entry operations are specific to the individual data forms and will be described under the corresponding sections (e.g., "Incidents", "Activities", "Items"), some functions are identical for a number of data forms, and these will be described only once and then cross-referenced throughout the 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.

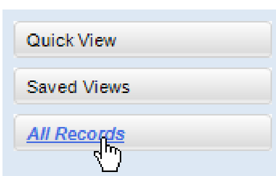
The common record functions/forms include the following:

- Importing a record's settings from the Gateway (the **Add** button; note that external record data can only be imported to the Gateway through the Import Manager);
- 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

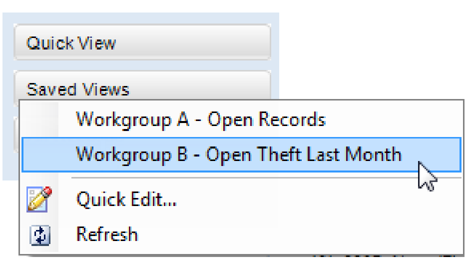
Display all records in the Listing pane

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 wish to access. The record view will now appear in the Listing pane.



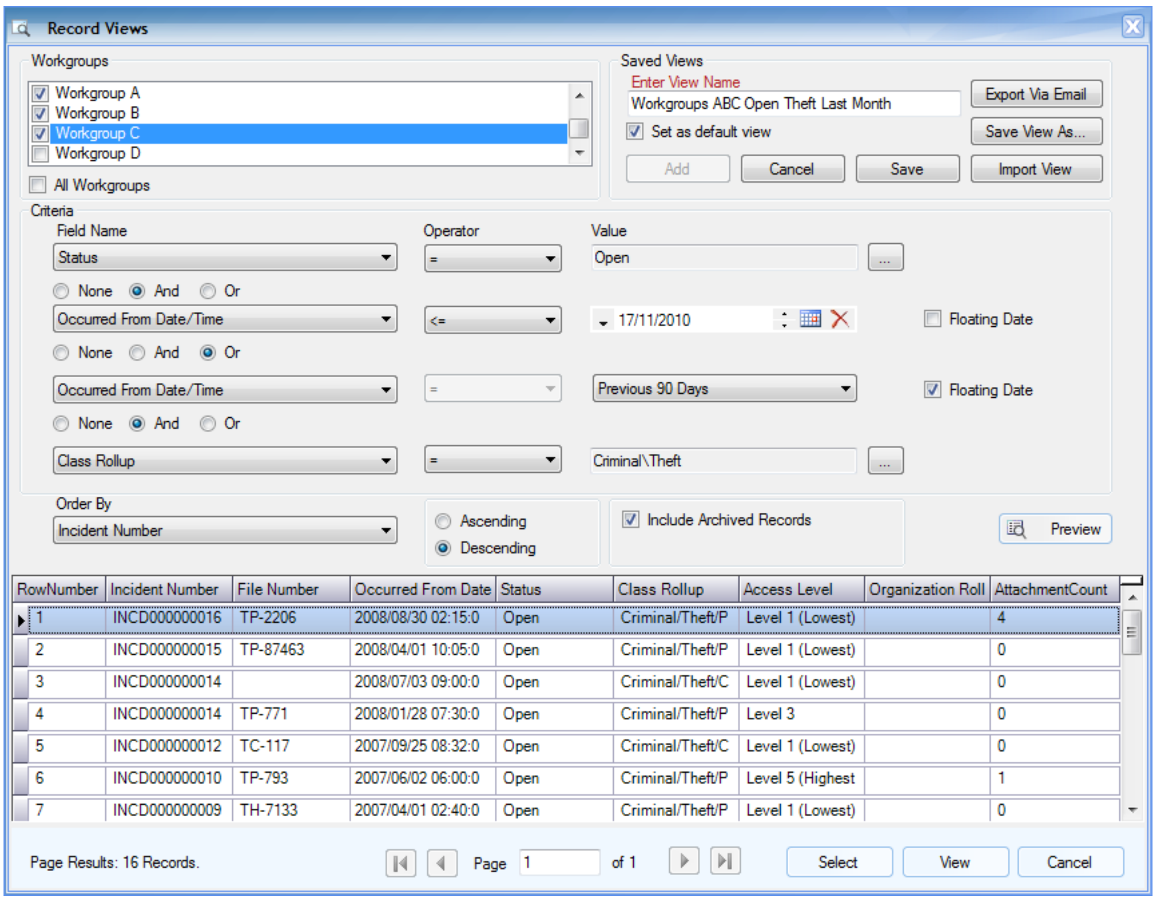
Create and save a new record view

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

2. In the view menu, click **Quick View**. The Record Views window will open for you to specify parameters of your record view.

3. Click the **Add** button in the Saved Views section. Type a name for your customized view in the active **Enter View Name** field.

4. 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 wish to restrict your view to the records of a particular group, uncheck the All Workgroups box and proceed to select the desired workgroups.



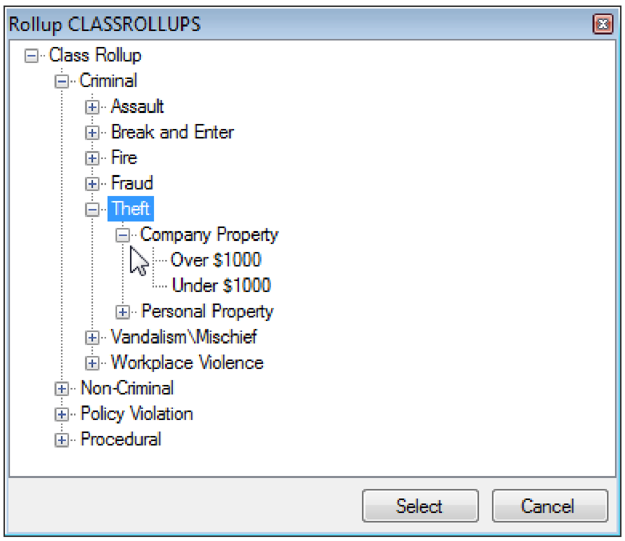
5. Specify the **Criteria** for your view:

   a. In the top **Field Name** lookup list, select the field that you wish 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 (<=), Begins With, Contains, etc.).

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 Class Rollup, you may select an Operator of equal (=) and a Value of Criminal/Theft to restrict your view to only those records classified as Theft.

Note that you may choose any node of the tree as the defining criterion, making your comparison value as narrow hierarchically as you wish. For example, 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. The **Floating Date** checkbox is only visible once a date field has been selected. For example, if you would like your view to display incident activity that occurred during a floating period of previous month, choose "Occurred From Date/Time" as Field Name, equal "=" as Operator, and then check the Floating Date box and select "Previous 30 Days" as your Value.

d. If you wish 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.

6. 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, etc.), then select either the **Ascending** or **Descending** radio button to further define the record order. Ascending lists the records according to the chosen Order By field in alphabetical order or from lowest

number to highest. Descending lists the records according to the selected Order By field in reverse alphabetical order or from highest number to lowest.

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

8. 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 below under **Page Results**.

9. 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.

10. If you wish to save the record view for future use, complete the **Saved Views** section. Otherwise, proceed to the next step. Perspective provides two 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 become available under the Saved Views menu.

    - If you wish 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.

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

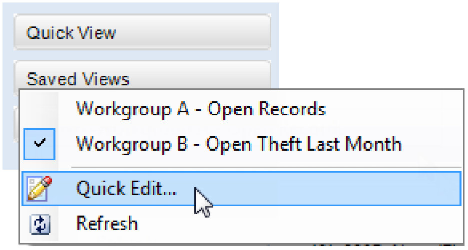
12. Click on a record in the Listing pane to display it in the Viewing pane. If you clicked on a particular record in the Record Views window prior to clicking Select, this record will be highlighted in the Listing pane and will already be opened in the Viewing pane.

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 and select **Quick Edit**. The Record Views window will pop up.

3. If you have not yet opened a saved record view and your Listing pane is blank, select an existing view you wish 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.



4. Modify the parameters as required. For options, see the “Create and save a new record view” chapter in the current section.

5. 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 wish 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 become available in the Saved Views menu.

   If you do not wish 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. Select **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 wish 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" chapter in the current section.

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.

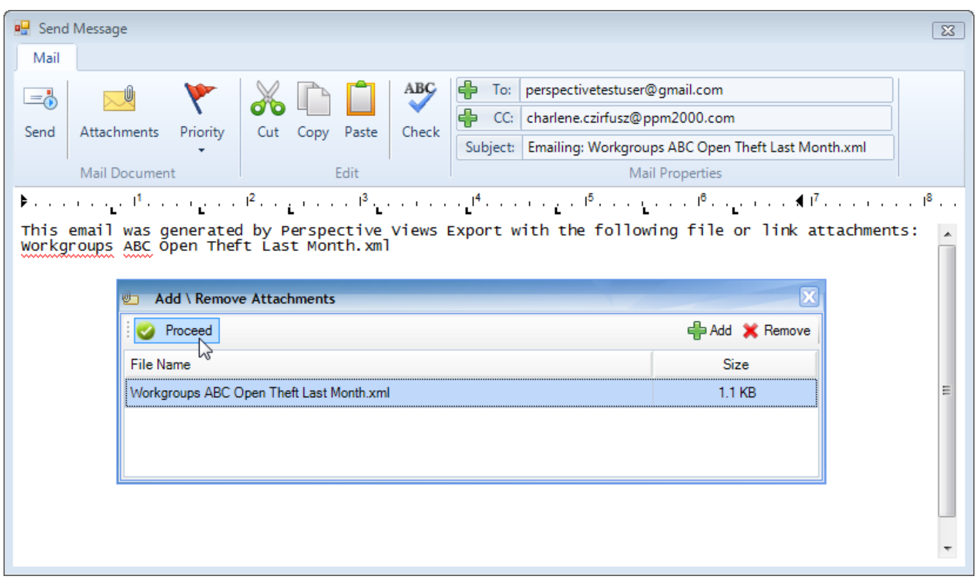
3. In the displayed Record Views window, specify the settings of a new record view and save them, as described above, or select an existing view you wish to email in the **Saved Views** menu.

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. 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.

7. Click **Send**. Close the Record Views window to return to the Data Forms window.



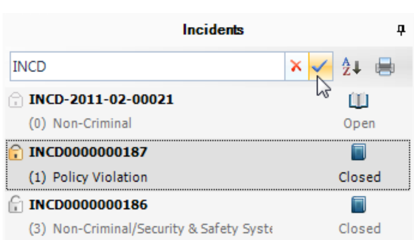
Delete a record view

1. In the Navigation pane, choose the record entity you intend to work on (e.g., Incidents).
2. Expand the Saved Views menu and select **Quick Edit**. The Record Views window opens.
3. If you have not yet opened a saved record view and your Listing pane is blank, select an existing view you wish 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.
4. Click the **Delete** button. In the Delete confirmation box, click Yes. 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 to further filter 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 that 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, etc.). To apply the filter, click the checkmark icon . To remove the filter, click the clear icon and then the checkmark icon, to view the original list.
- Use the visual cues provided for each record entry to select the record that best suits your needs. In the Listing pane, records are displayed as either locked from editing , unlocked from previous locking , or as unaltered , the latter meaning that the record has never been locked before. The number of files attached to a record is displayed in parentheses. The status of the record may be displayed as either "Closed" or "Open". Drawn from the Controls tab, a record's "Closed" status generally means that the record has been processed up to a point where no further action is required. By default, records are created as "Open".



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

Note that 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.

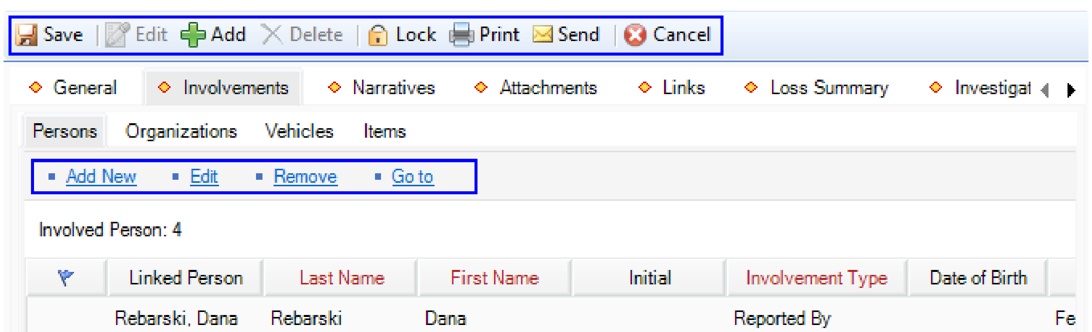
Enter and/or edit record data

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	Preserves the changes made to a record. Make sure to complete every data entry action with saving the changes applied to the record by clicking Save on the Viewing pane toolbar.
Edit	Switches a record into the "edit" mode. After clicking Edit, select the field you wish to edit and make the necessary change.
Add	Creates a new record from scratch.
Delete	Removes an entire record from the database.
Lock	Bars a record from editing.
Unlock	Makes a record available for editing. (This button will only appear if the record is currently locked.)
Print	Prints, displays or saves the PDF copy of a record in the report form. After clicking Print, specify which type 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 wish to download attachments, and 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 the guide.

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

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

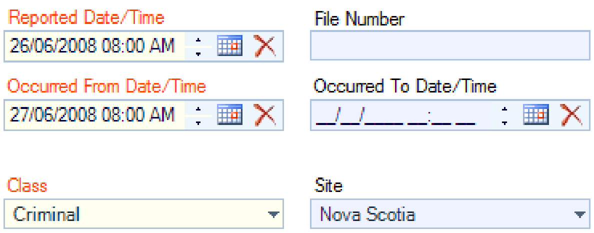


To start editing details inside the record, you have to first put the record into the "edit" mode by clicking **Edit** on the Viewing pane toolbar. Then, to apply changes to a record's entity (e.g., an Involved Person), select the entity in the grid and use the functions displayed in the sub-tabbed toolbar.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

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), simply 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 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. 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, etc.), without leaving the pop-up window, using the Previous and Next buttons.
Seal/Unseal	Removes/restores editing rights from/for an entity. Note that 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 involvements" chapter. *Note: The Case component is available in Perspective Premium only.*

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



Note that in 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.

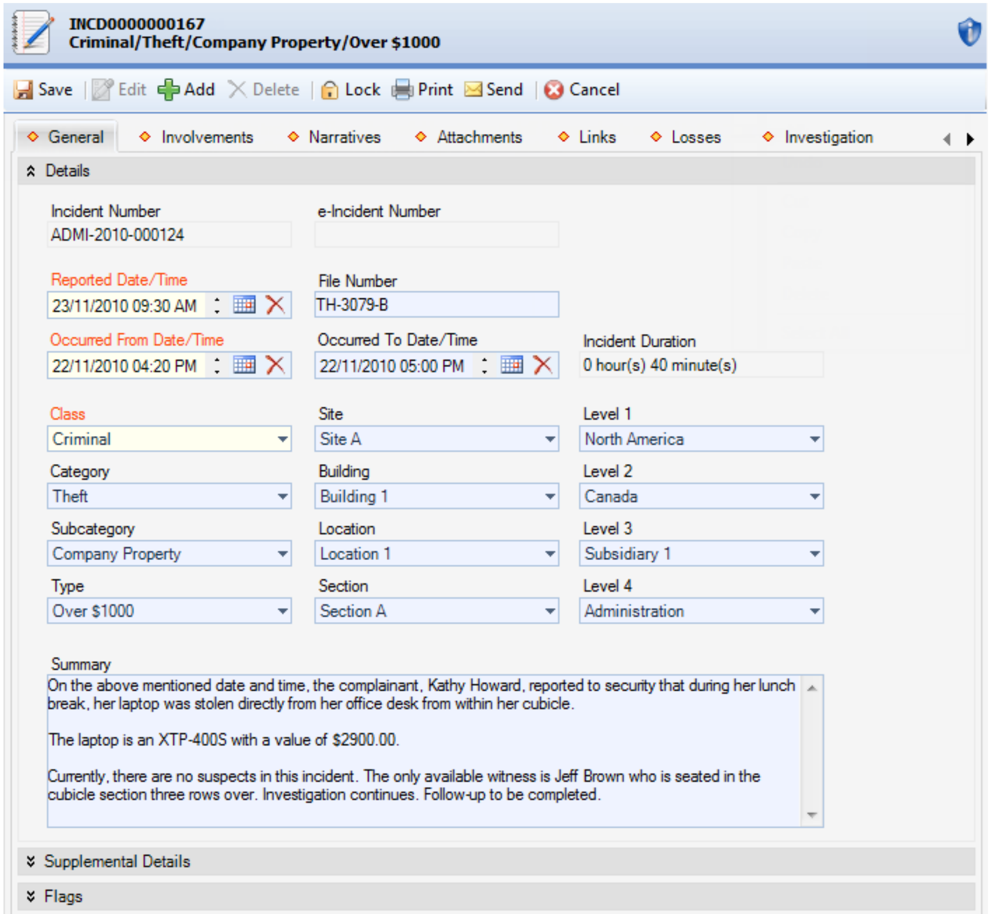
Incidents

Create a new Incident record

Note general details of the incident

1. Click the **Add** button in the Viewing pane toolbar.
2. Perspective will automatically assign an **Incident Number** when the record is saved.
3. 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.
4. If applicable, input a file or reference number under **File Number**.
5. Indicate when the incident was reported to supervisors under **Reported Date/Time**.
6. 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.
7. 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.
8. 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.
9. Identify which business unit the incident affected by selecting options from the **Level 1** to **Level 4** lookup lists, if applicable.

10. Type a brief overview of the incident in the **Summary** box. (To enter a more detailed description of the incident, outline the sequence of events under the Narratives tab.)



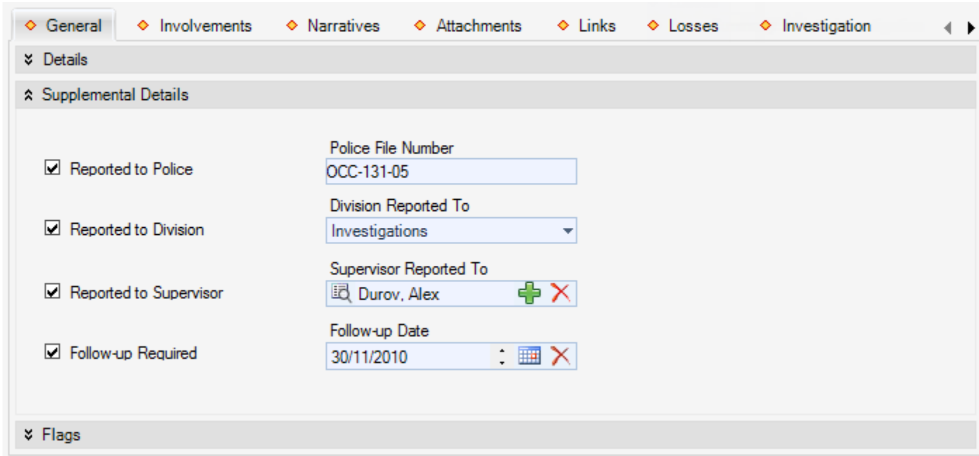
Indicate which authorities have been notified of the incident

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

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

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

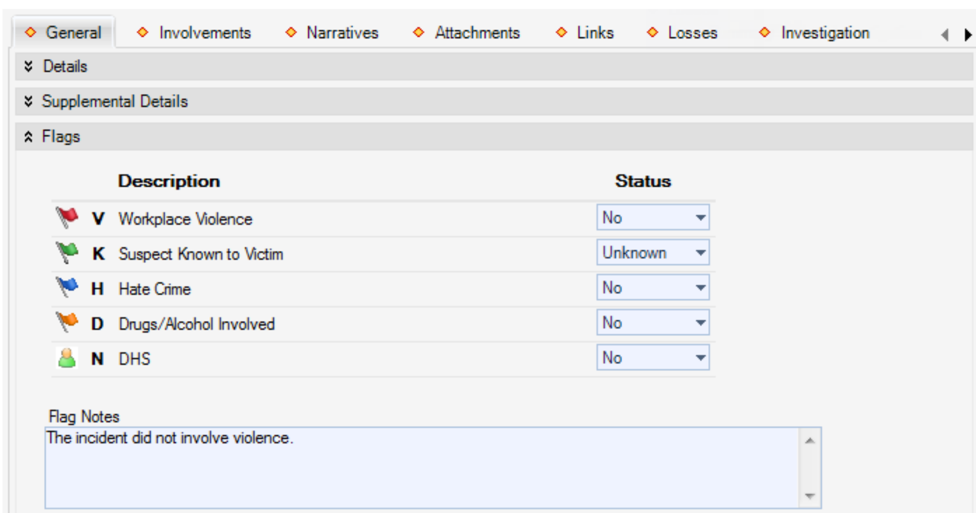
4. If the incident requires follow-up, check the **Follow-up Required** box and enter the Follow-up Date.



Flag the incident

1. In the Flags section, select each flag's **Status** (i.e., Yes, No or Unknown), depending on whether or not the flag applies to the incident. Examples of flags include Hate Crime, Drugs/Alcohol Involved and Weapon Involved.

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



Identify all involved persons

Note general details of an involved person

1. Select the **Involvements** tab, **Persons** sub-tab.

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

3. 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.

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

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

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

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

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

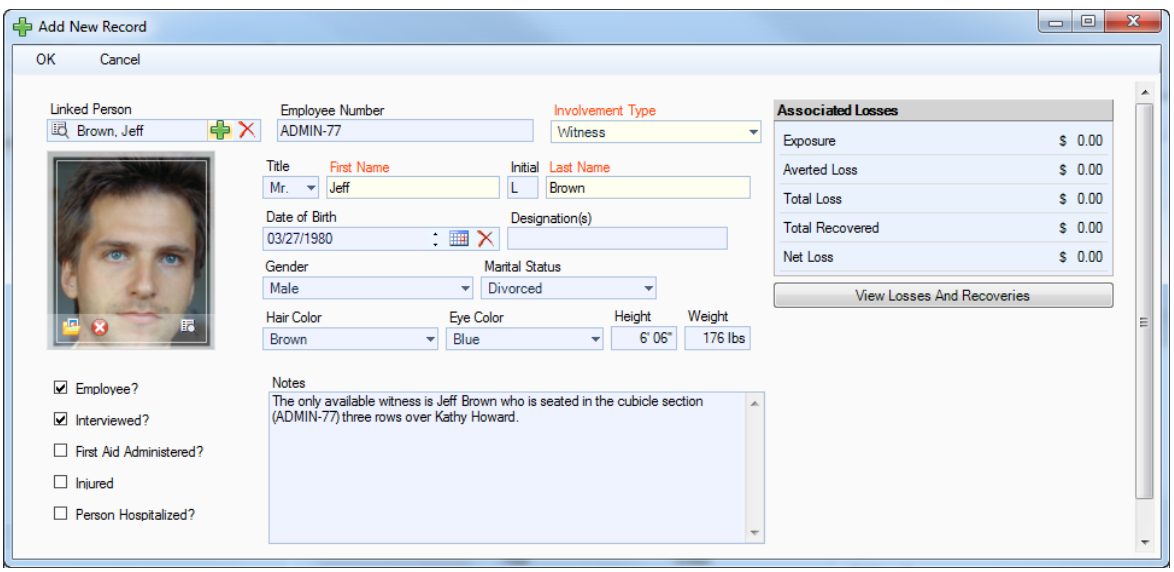
9. If the person is an employee of your organization, check the **"Employee?"** box and enter the **Employee Number**.

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

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

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

13. To add a photo of the involved person to the record, click the Add icon in the image box. Locate the image file in the browser window and click Open.



Add the involved person's clothing details

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

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

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

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

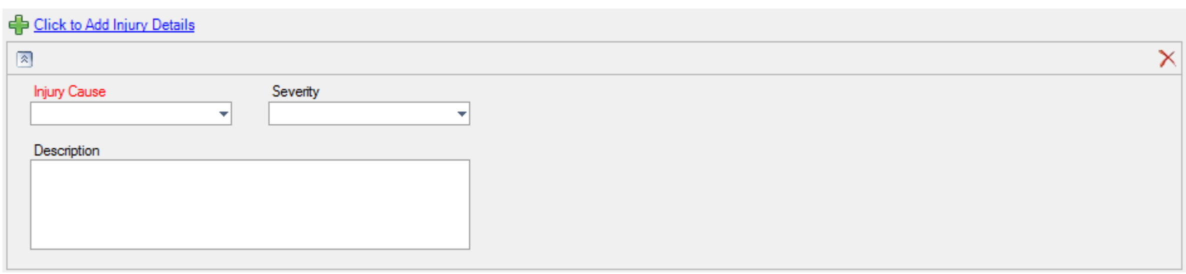
Record the involved person's sustained injuries

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

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

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

4. Repeat for as many injury entities as necessary.

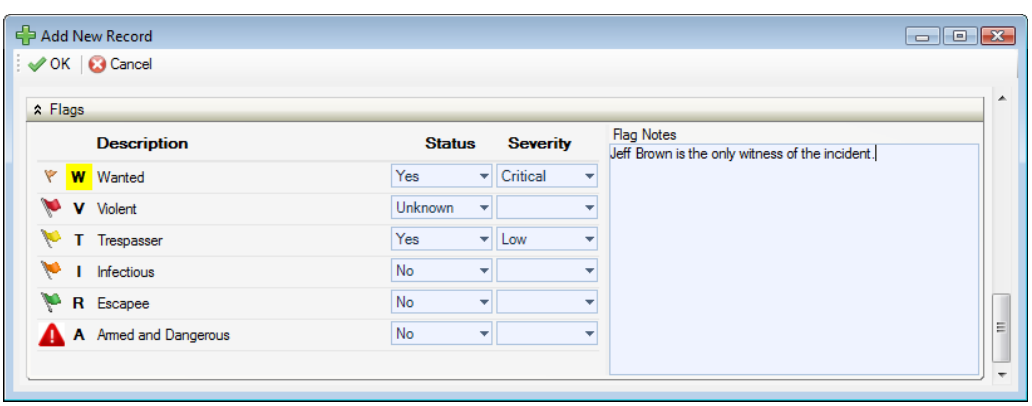


Flag the involved person

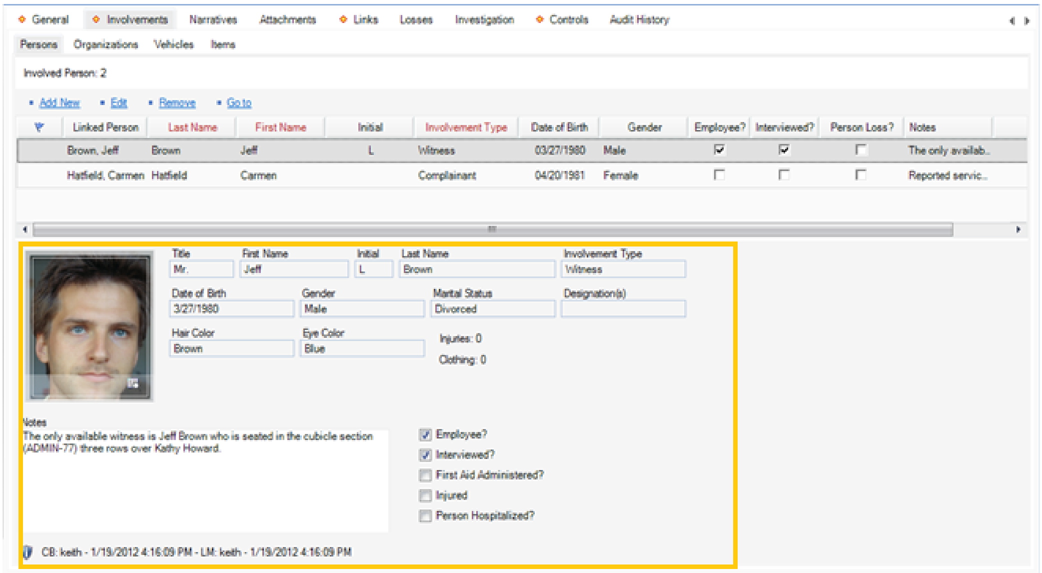
1. In the Flags section, specify the **Status** (i.e., Yes, No or Unknown) as well as the **Severity** of each flag (e.g., Critical, High, Low). Flags may include such descriptions, as Trespasser, Violent, Infectious, Escapee, Wanted, etc.

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

3. Click **OK**.



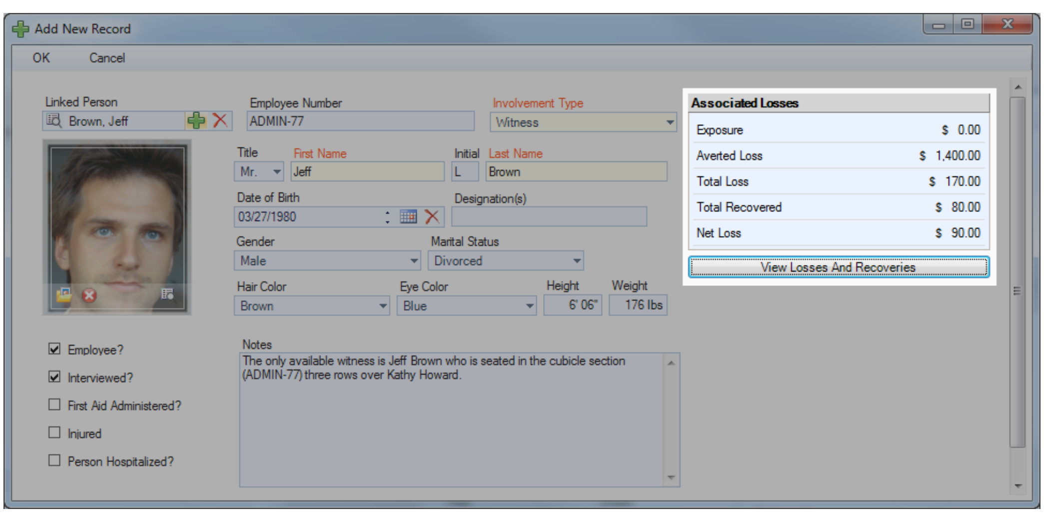
4. As you click OK, the newly created entity will be displayed in the Involved Persons list, each entity occupying a single row in the list. To display the entity's general information in the bottom Viewing pane, select the corresponding row in the list.



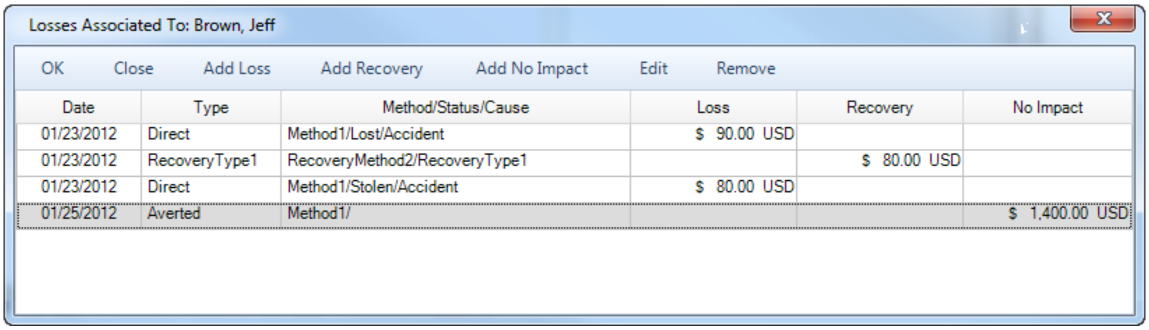
Add losses and recoveries associated with an involved entity

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

2. Double-click the involved entity in the list with which you wish to associate a loss (e.g., the Jeff Brown's Person record). In the **Associated Losses** section in the top right corner you will see the summary of the losses previously associated with the open entity, including a summary of the entity's recovery (**Exposure** and **Averted Loss**), **Total Loss**, **Total Recovered** loss and **Net Loss**.



3. To review the details of the losses associated with the entity, click on the **View Losses and Recoveries** button under the **Losses Associated To** summary grid. A new window will open where you will be able to see the **Date** a loss was recorded, the **Type** of the loss, the **Method/Status/Cause** the loss was or could have been incurred and the relevant value of the loss.



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

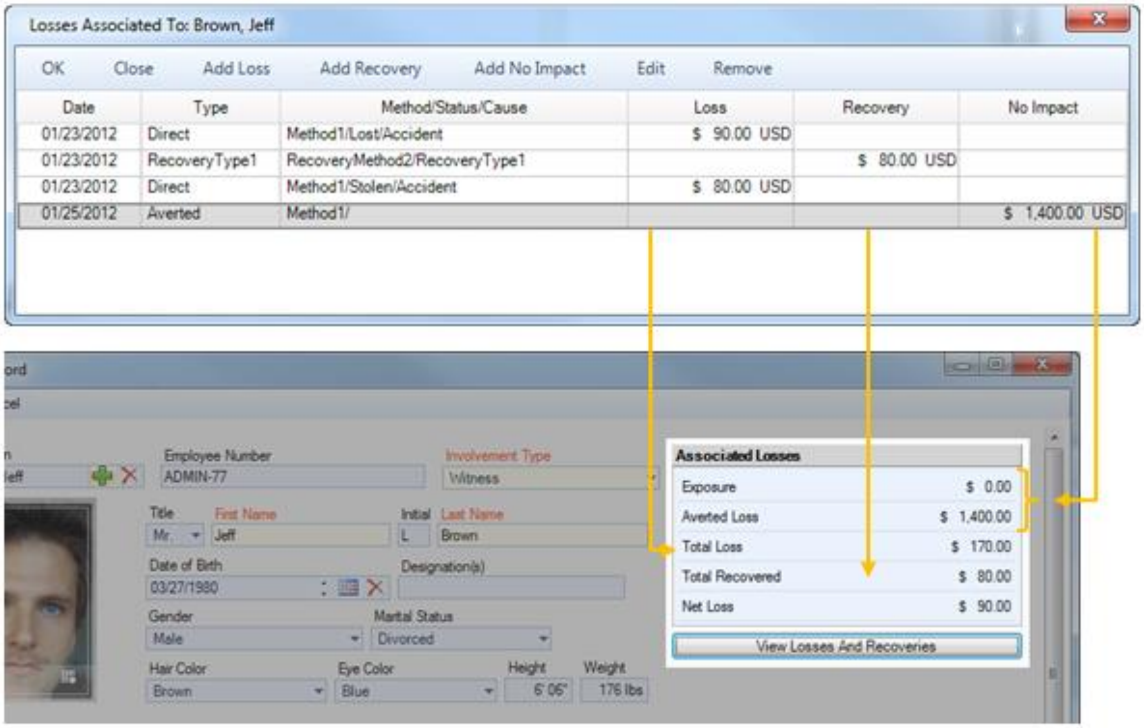
   - To add a loss that has occurred, click **Add Loss**.
   - To add a loss that has occurred and has been recovered, click **Add Recovery**.
   - To add a potential exposure loss or an averted loss that is associated with the involved entity, click **Add No Impact**.

5. Depending on the option you chose, a new screen will display a sub-form 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" chapter.

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

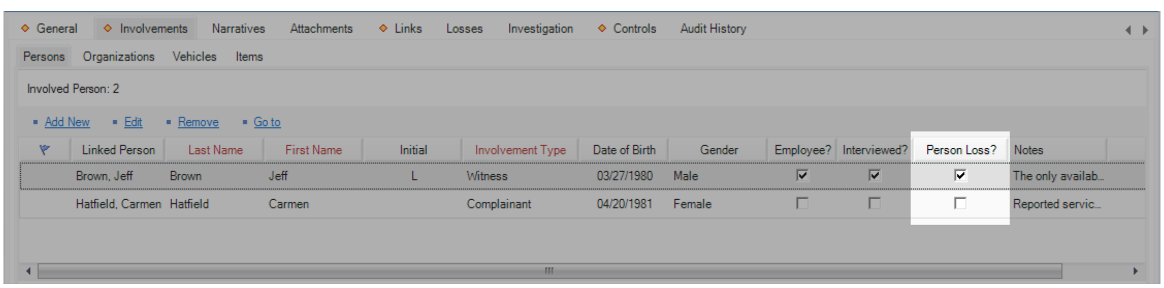
7. Add as many loss entries as necessary, repeating the steps 4-6. Then, click **OK** to save the associated losses on the involved entity's record and see updated summary calculations in the **Associated Losses** section of the sub-form:

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



8. Click **OK** on the main involved entity's sub-form. The entity's entry in the list will be updated with a checkmark under the **Person/Organization/Vehicle/Item Loss?** column. The loss will also be recorded as a separate entry under the **Losses** tab.

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



Identify all involved organizations

Note general details of an involved organization

1. Select the **Involvements** tab, **Organizations** sub-tab.

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

3. 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.

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

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

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

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

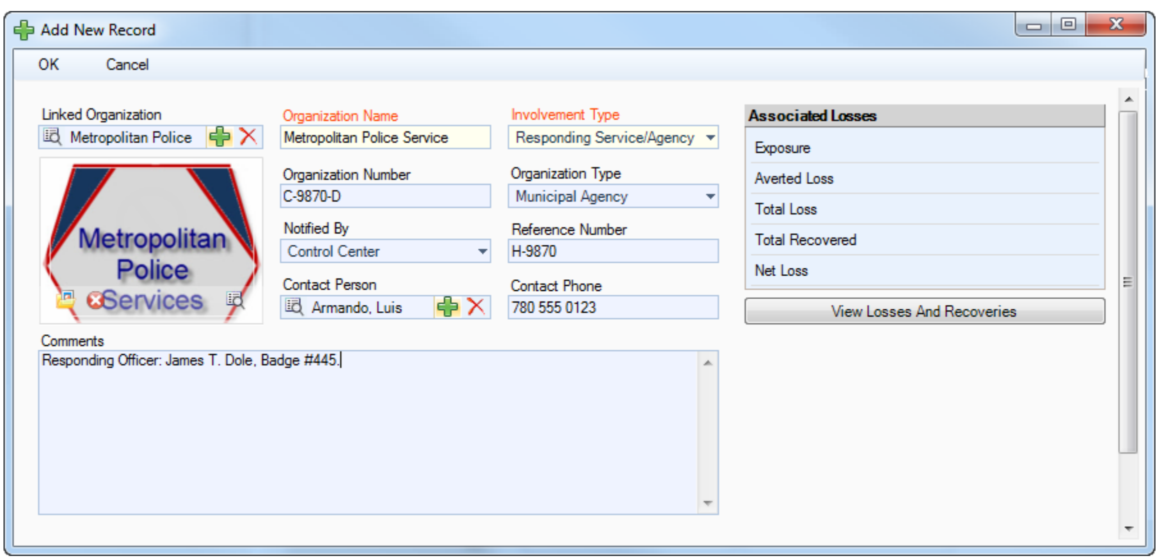
9. If there is any documentation associated with the organization's involvement in the occurrence (e.g., a work order), note the associated tracking number in the **Reference Number** field.

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

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

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

13. To add the organization's logo to the record, click the Add icon in the image box. Locate the image file in the browser window and click Open.



Note an action request sent to the involved organization

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

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

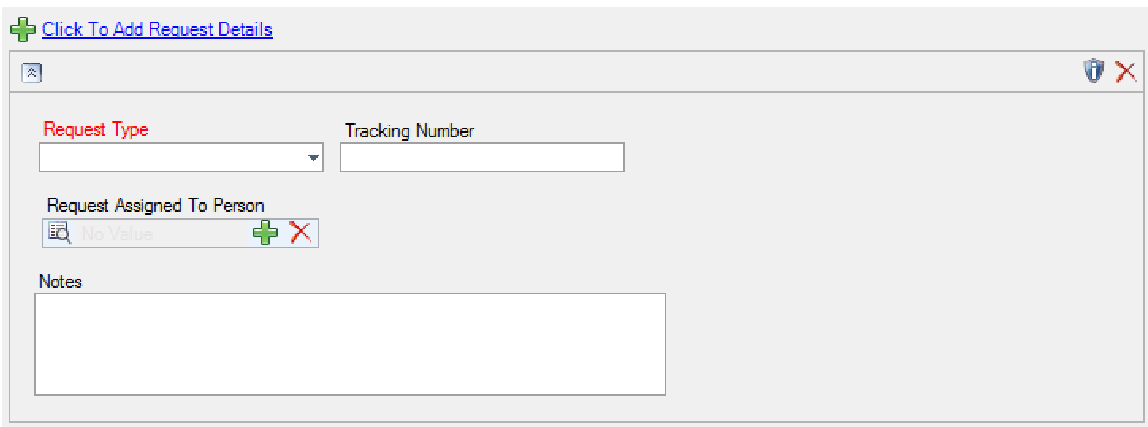
3. If there is a tracking or other ID number, enter it in the **Reference Number** field.

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

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

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

7. Add any necessary **Notes**.



Log the involved organization's response to the incident

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

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

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

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

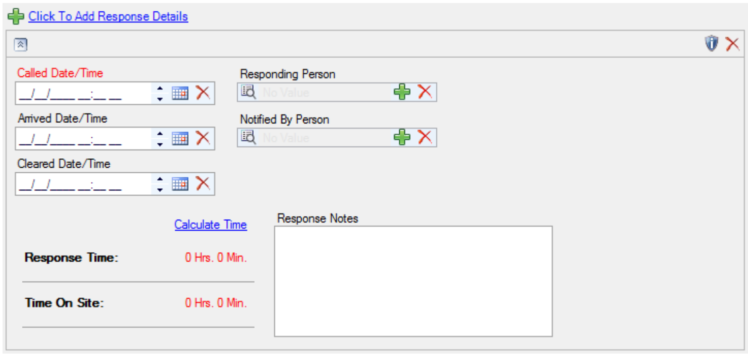
5. Enter the date and time the organization arrived on site in the **Arrived Date/Time** field.

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

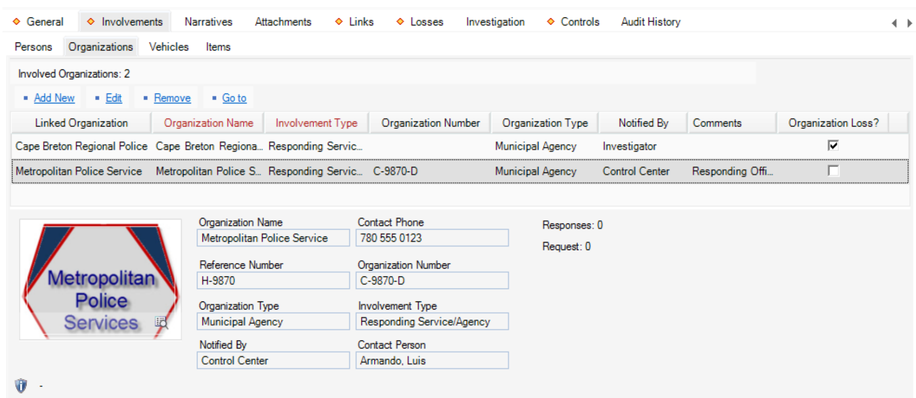
7. Click the **Calculate Time** link to determine how long it took the organization to respond (Response Time) and how long they remained on site (Time On Site).

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

9. Click **OK**.



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



Add losses and recoveries associated with the involved organization

Complete the operation, as described in the "Identify all involved persons" chapter, the "Add losses and recoveries associated with an involved entity" sub-chapter.

Document all involved vehicles

Note general details of an involved vehicle

1. Select the **Involvements** tab, **Vehicles** sub-tab.

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

3. 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.

4. 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, etc.).

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.

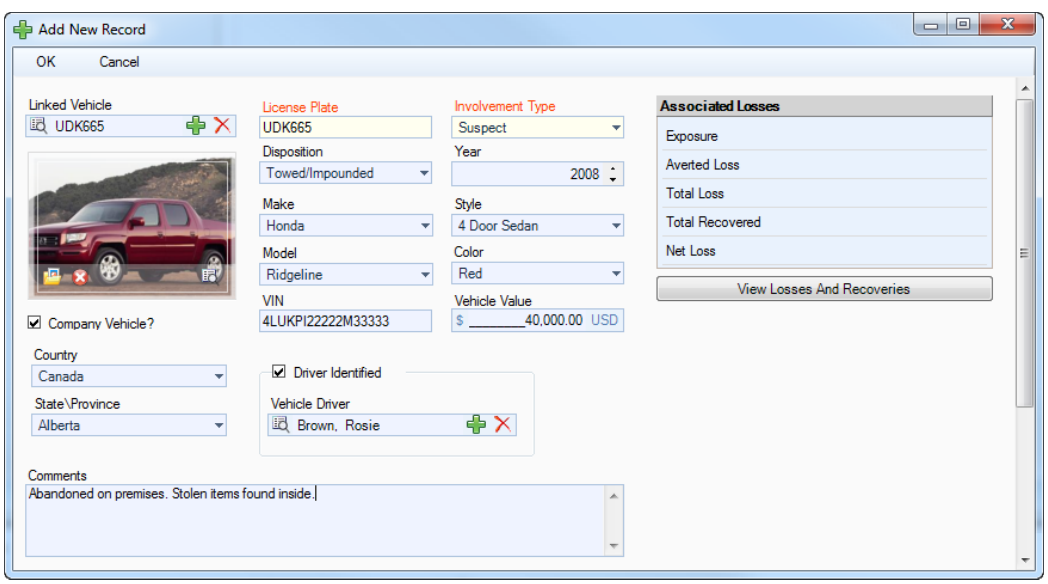
10. If known, indicate where the vehicle's license plate is registered in the **Country** and **State/Province** fields.

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.

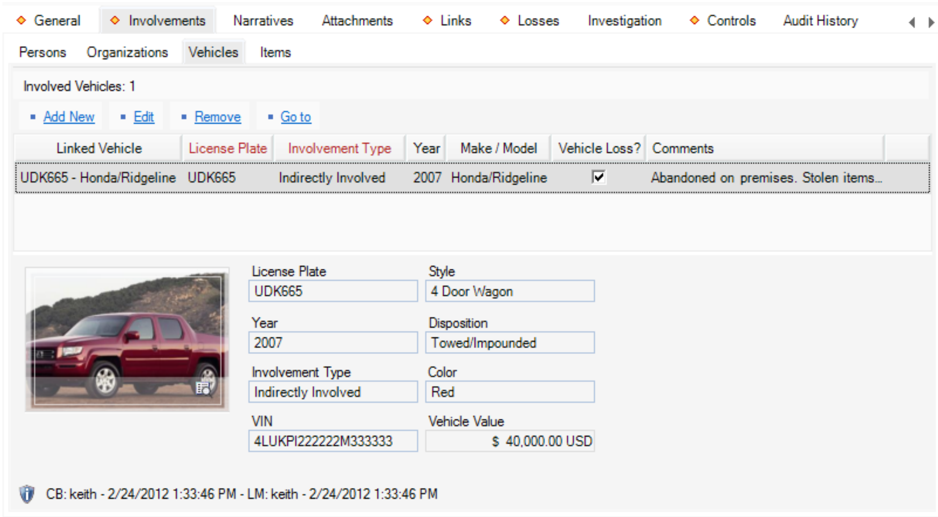
12. Enter any applicable notes under **Comments**.

13. To add a photo of the vehicle to the record, click the Add icon in the image box. Locate the image file in the browser window and click **Open**.

14. Click **OK**.



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



Add losses and recoveries associated with the involved vehicle

Complete the operation, as described in the "Identify all involved persons" chapter, the "Add losses and recoveries associated with an involved entity" sub-chapter.

Identify all involved items

Note general details of an involved item

1. Select the **Involvements** tab, **Items** sub-tab.

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

3. 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.

4. 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, etc.).

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.

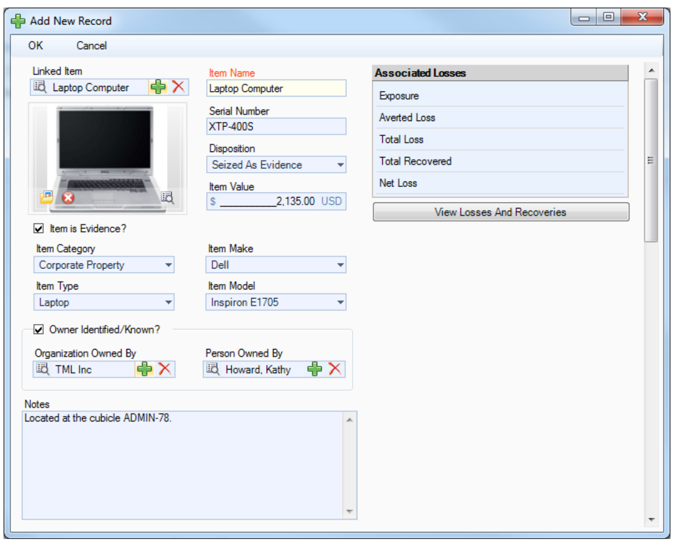
10. Specify the **Item Make** and **Item Model**. These fields are hierarchical.

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.

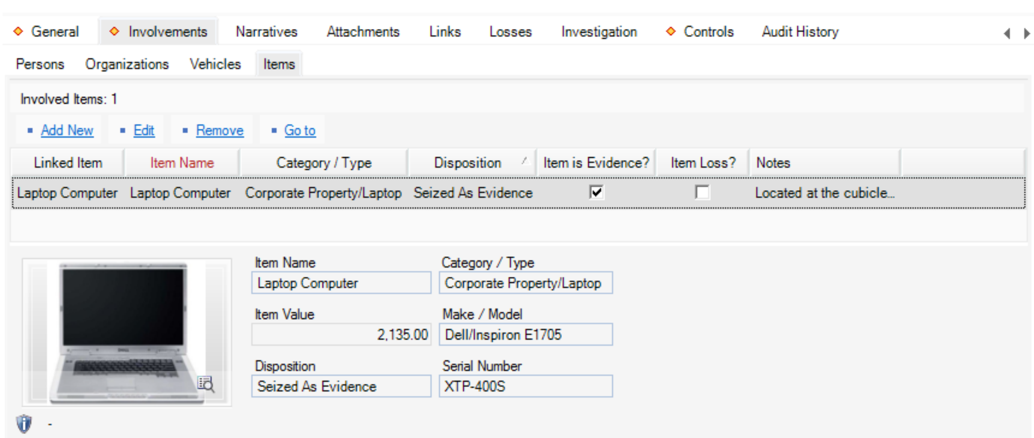
12. Add comments about the item in the **Notes** field.

13. To add a photo of the item to the record, click the Add icon in the image box. Locate the image file in the browser window and click Open.

14. Click **OK**.



15. 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 "Identify all involved persons" chapter, the "Add losses and recoveries associated with an involved entity" sub-chapter.

Summarize an incident or a case

1. Click 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 the guide.

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

Attach a file to a record

1. Click the **Attachments** tab.

2. Click the applicable **Add** link. A pop-up window will open.

3. Add attachments by either dragging and dropping or clicking **Browse**.

4. For each attachment:

    a. The **Attachment Title** field will automatically populate with the name of the attached file. If necessary, modify the name.

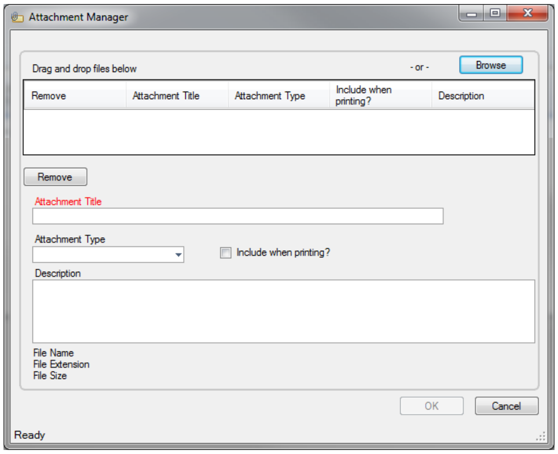
    b. From the **Attachment Type** lookup list, select the appropriate designator for the attachment (e.g., Document, Picture, Video, Voice Recording).

    c. Give an overview of the attachment in the **Description** text box.

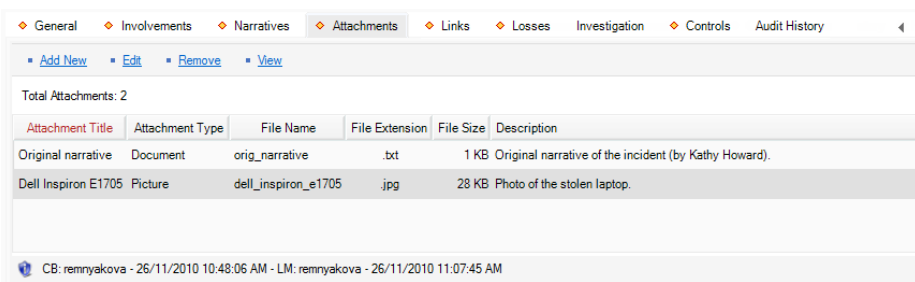
d. For image files (e.g., .bmp, .gif, .jpg, .png), check the **"Include when Printing?"** box to have a copy of the image included with every print-out of the record.

e. Click **Remove** to remove any unwanted attachments.

5. Once finished working with attachments, click **OK**.



6. To preview an attachment, ensure the attachment is highlighted in the grid and click **View**. Once the attachment is loaded, click **Open**. The attachment file will open in a separate window. Close the window to return to the record.



Link the incident to an activity

1. Select the **Links** tab.

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

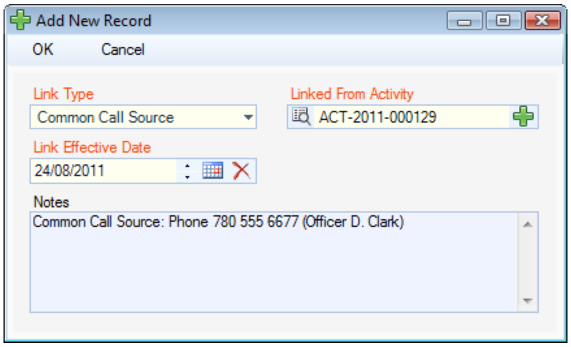
3. Specify how the incident and activity are related in the **Link Type** field (e.g., Common Call Source, Common Location).

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

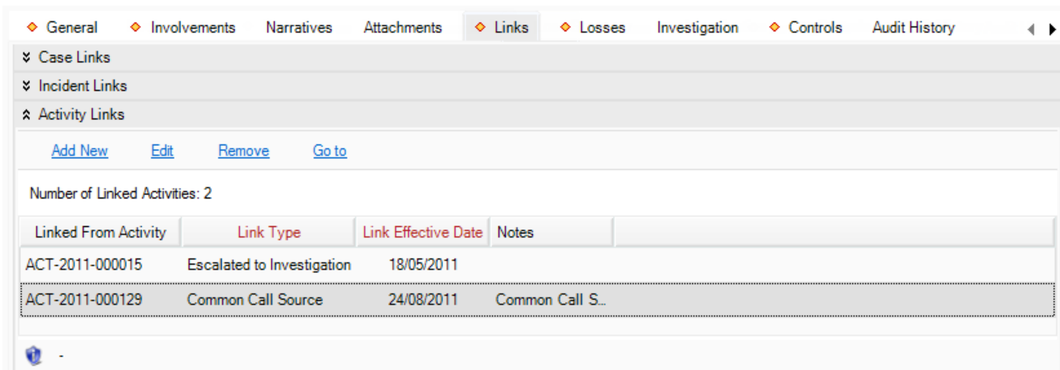
5. Indicate the date that the incident became associated with the activity in the **Link Effective Date** field.

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

7. Click **OK**.

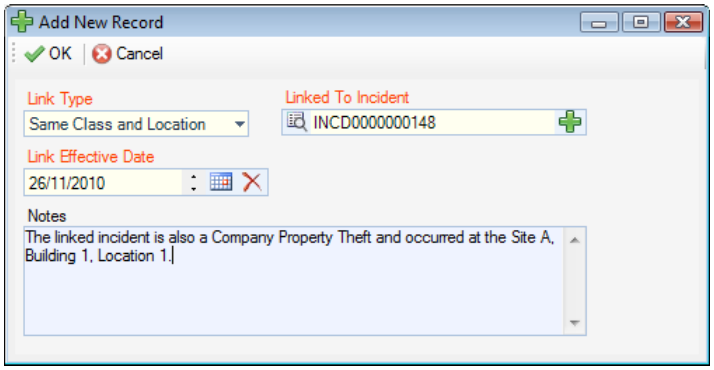


8. Click **Save**, after which this link will be automatically cross-referenced in the linked activity's record under the Links tab.

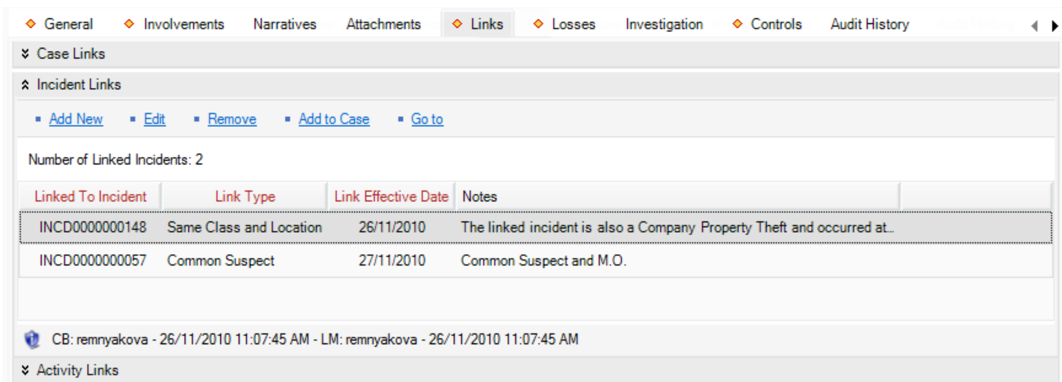


Link an incident to another incident

1. Select the **Links** tab.
2. In the **Incident Links** section, click **Add New**. A pop-up window will open.
3. Select the appropriate incident from the **Linked To Incident** pick list.
4. Specify how the two incidents are related in the **Link Type** field (e.g., Common Suspect, Similar Description).
5. Indicate the date that the two incidents became associated with each other in the **Link Effective Date** field.
6. Type any additional information about the link in the **Notes** field.
7. Click **OK**.



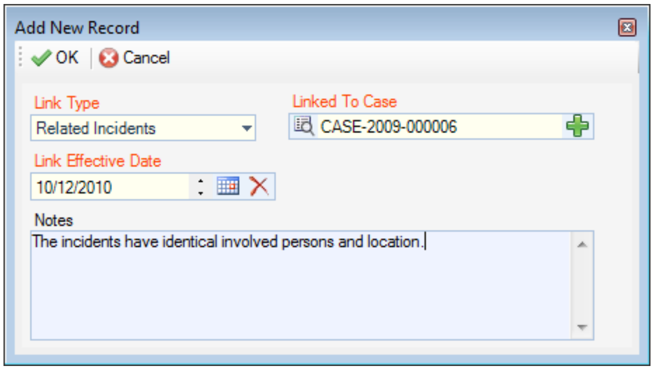
8. Click **Save**, after which this link will be automatically cross-referenced in *both* Incident records under the Links tab.



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

Note: The Case component is only available in the Premium Edition 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. Click **OK**.
6. A confirmation message will notify that links were created successfully. Click **OK**. Note that once you click Save, 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 Premium Edition of Perspective.

1. Select the **Links** tab.

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

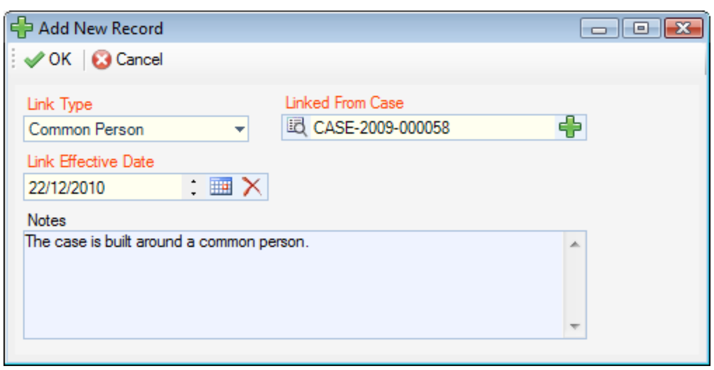
3. Specify how the incident and case are related in the **Link Type** field (e.g., Common Person, Related Incidents).

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

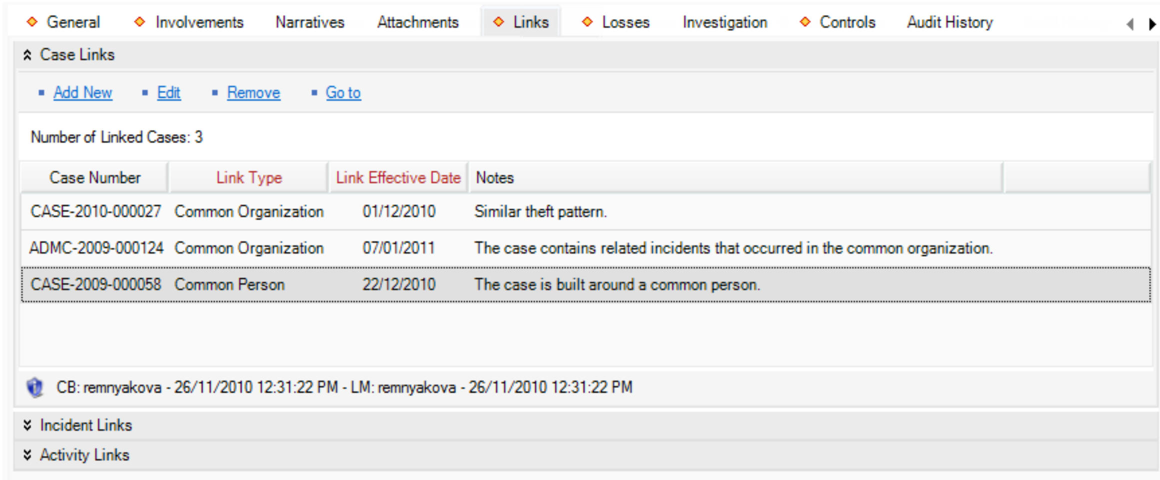
5. Indicate the date that the incident became associated with the case in the **Link Effective Date** field.

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

7. Click **OK**.



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



Record losses involved in an incident and view their summary

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

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

1. To add a loss, open the **Losses** tab and click on the **Add Loss**, **Add Recovery** or **Add No Impact** hyperlink considering the type of loss that you wish to record. Depending on the option you chose, a new screen will display a sub-form designed for the type of loss you selected. Note that 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 with which you wish to associate your loss entry, select one of the options from the **Associated Type** lookup.

   Note: If you wish 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" chapters.

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 that 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.

Note: 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" chapter.

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

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

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

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

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

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

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

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

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

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

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

    - **Total:**

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

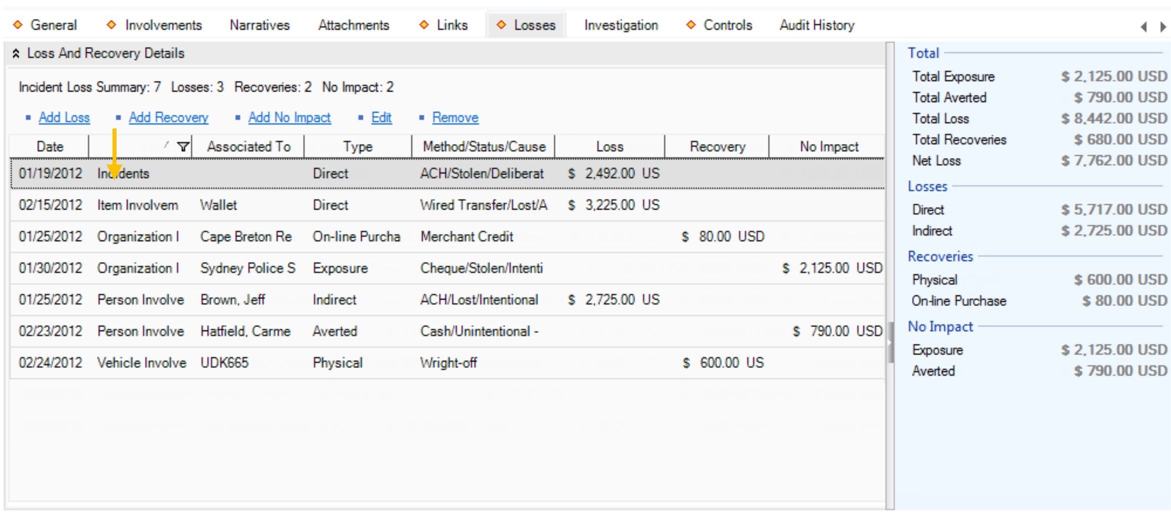
      Total Averted: The total value of the *Averted No Impact* loss associated with the incident and the involved entities.

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

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

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

- **Losses:** The total values of *Loss* amounts arranged by *Loss Type* (e.g., Direct or Indirect).
- **Recoveries:** The total values of *Recovery* amounts arranged by *Recovery Type* (e.g., Physical or On-line Purchase).
- **No Impact:** The total values of *Recovery* amounts arranged by *No Impact Type* (i.e., Averted or Exposure).



Record incident investigation data

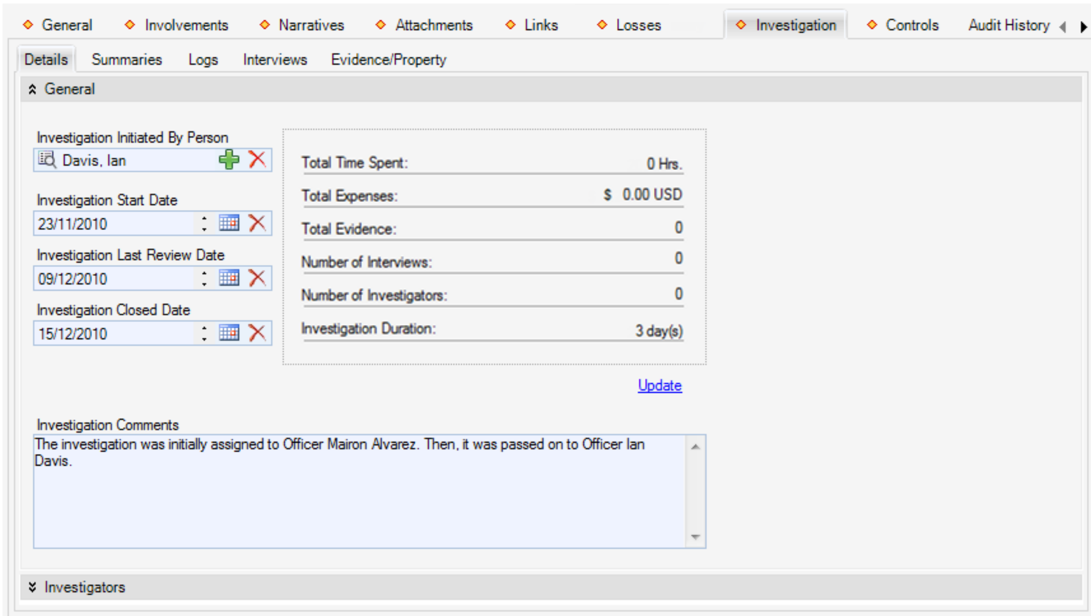
Note: The Investigation component is only available in the Premium Edition of Perspective.

Note general details of an investigation

1. Click on the **Investigation** tab, the **Details** sub-tab.
2. 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.
3. Enter the date the investigation was initiated under **Investigation Start Date**.
4. If the investigation has undergone a review, enter the applicable date in the **Investigation Last Review Date** field.

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

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



Assign an investigator to an incident's investigation

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

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

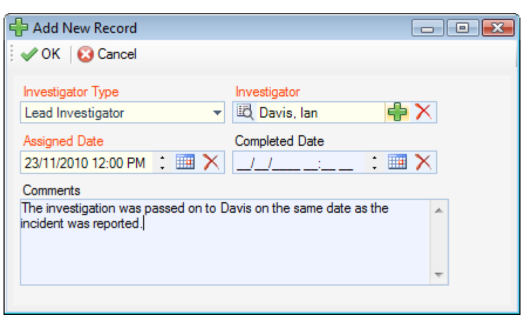
3. Select the record of the investigator from the **Investigator** pick list.

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

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

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

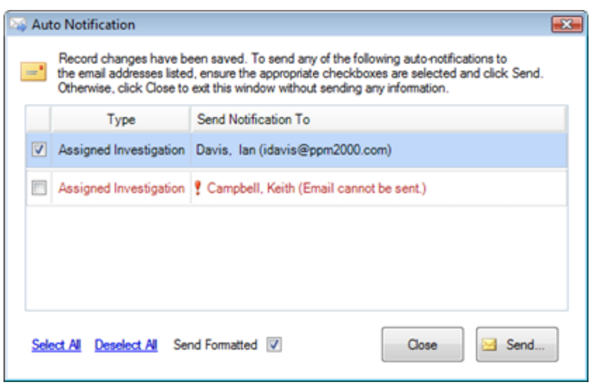
7. Click **OK**.



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

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

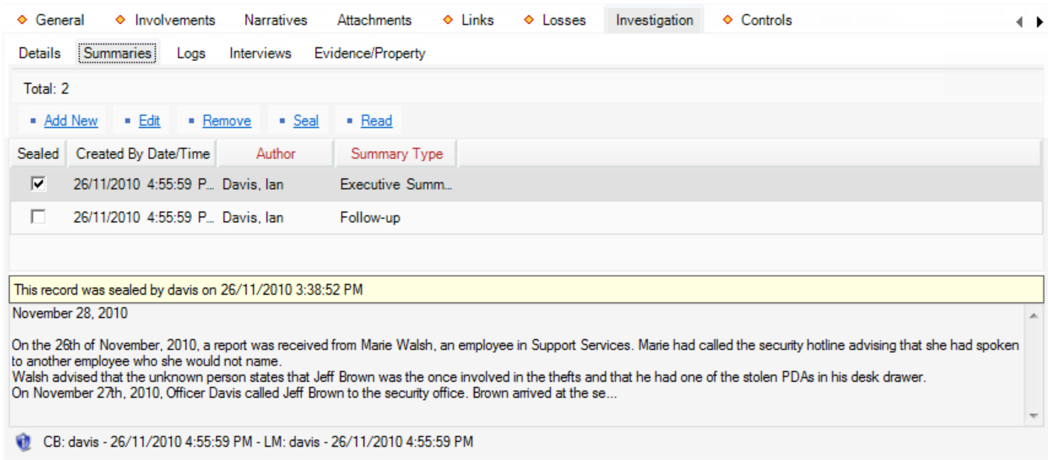
- To send an email notification of the assigned investigation to the investigator, ensure the appropriate checkbox is selected and click **Send**. Notifications are automatically sent in HTML. De-selecting the **Send Formatted** box, prior to clicking Send, will format the notification details in plain text rather than the default HTML table.
- If the investigator does not have a primary email address entered in the system, an error message appearing beside the investigator's name will indicate that an email cannot be sent. In this case, click **Close** to exit the window.



Summarize an incident's or a case's investigation

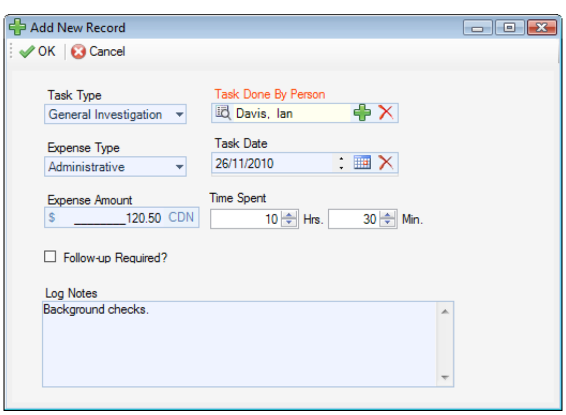
1. Select the **Investigation** tab, and then click the **Summaries** sub-tab.
2. Click the appropriate **Add** link. The Summary Editor window will open.
3. In the window, choose the applicable description from the **Summary Type** lookup list (e.g., Investigation Summary, Follow-up). By default, your 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 the guide.

5. When finished with your summary, click **Accept & Return**. The Summary Editor window will close, and the Summaries grid will populate with the new investigation summary.

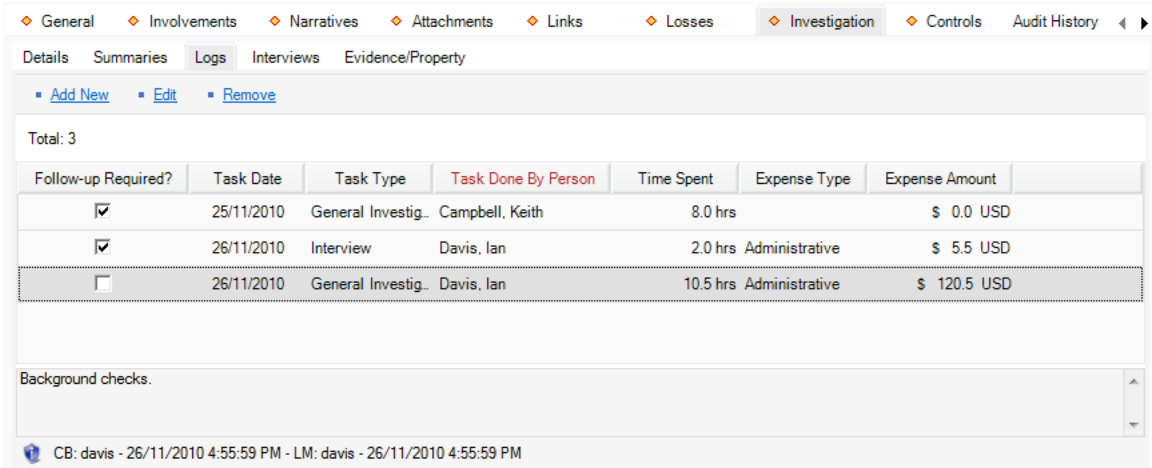


Log investigative tasks and expenses

1. Select the **Investigation** tab, and then click the **Logs** sub-tab.
2. Click the appropriate **Add** link. A pop-up window will open.
3. Specify the nature of the task in the **Task Type** field.
4. 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.
5. If applicable, specify the date the task was finished under **Task Date**, and the time it took to complete under **Time Spent**.
6. If there is an expense associated with the task, enter the **Expense Type** and the total **Expense Amount**.
7. Check the **"Follow-up Required?"** checkbox, if applicable.
8. Enter any additional information about the task under **Log Notes**.



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



Document investigation interviews

1. Select the **Investigation** tab, the **Interviews** sub-tab.

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

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

4. 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.

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

6. 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.

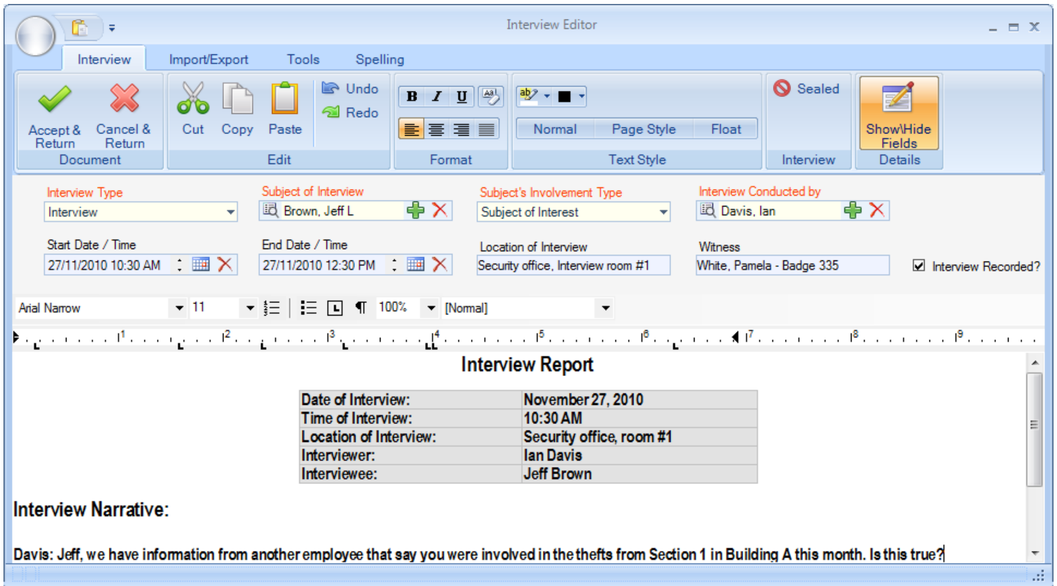
7. Specify the **Start Date/Time** and the **End Date/Time** of the interview.

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

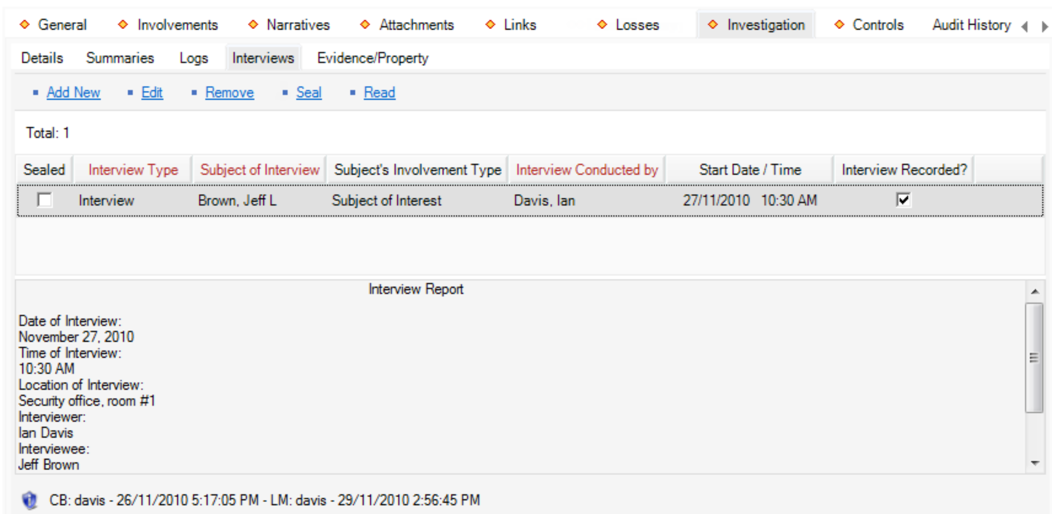
9. Identify the person who formally witnessed the interview in the **Witness** field.

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

11. 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 the guide.



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



Track investigation evidence

1. Select the **Investigation** tab, the **Evidence/Property** sub-tab.

2. Click the appropriate **Add** link. A pop-up window will open.

3. Input the item name under **Evidence/Property Name**.

4. Choose the applicable description from the **Evidence/Property Type** lookup list (e.g., Found, Recovered, Seized).

5. 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.

6. Specify the date and time the item was found/seized in the **Found/Seized Date/Time** field.

7. Describe where the item was found or seized in the **Found/Seized Location** field.

8. Select the person who seized the item from the **Seized By Person** pick list.

9. Indicate who the item was seized from by making a selection from the **Seized From Person** pick list.

10. Type any additional information about the item in the **Notes** textbox.

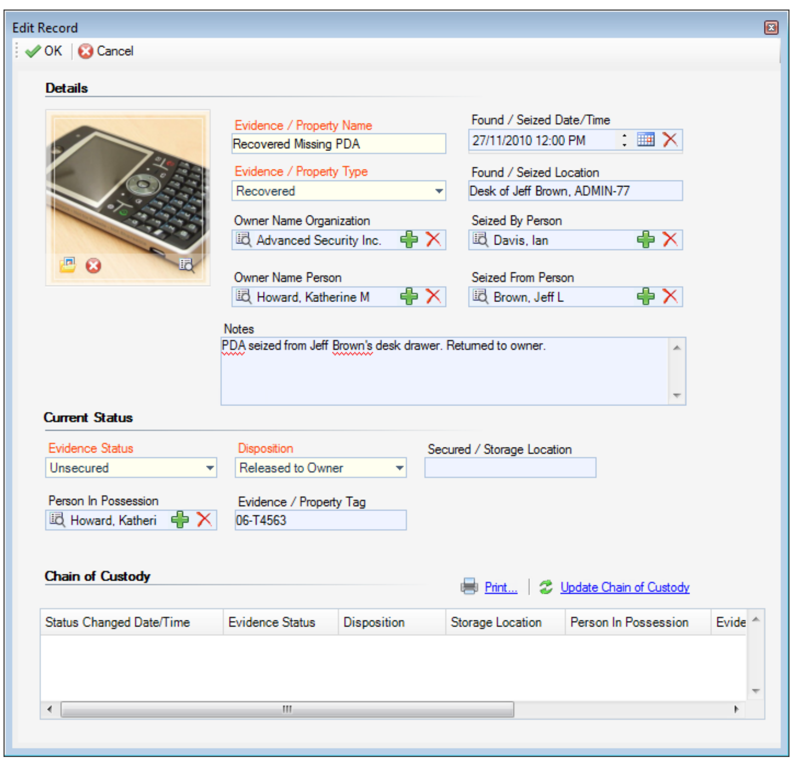
11. To add an image of the item to the record, click the Add icon in the image box. Locate the image file in the browser window and click Open.

12. In the Current Status section, choose the appropriate descriptors from the **Evidence Status** and **Disposition** lookup lists.

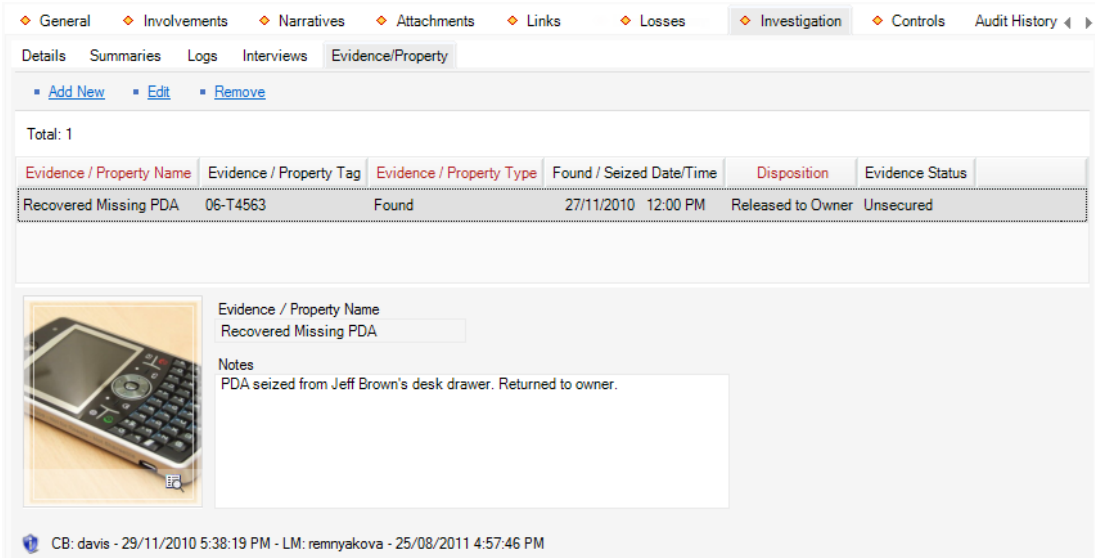
13. If the item is secured, enter the current location of the item in the **Secured/Storage Location** field.

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

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



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

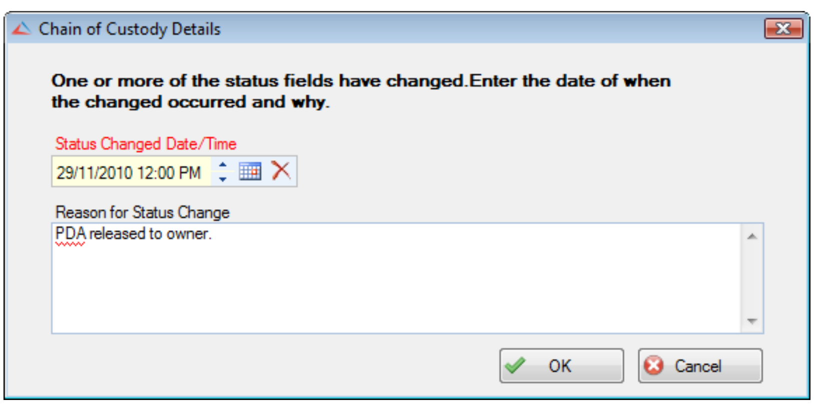


If you need to update the evidence's current standing, you have to open the relevant evidence entity in the "edit" mode, make the necessary changes to the fields listed under **Current Status** and follow the procedures described below:

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

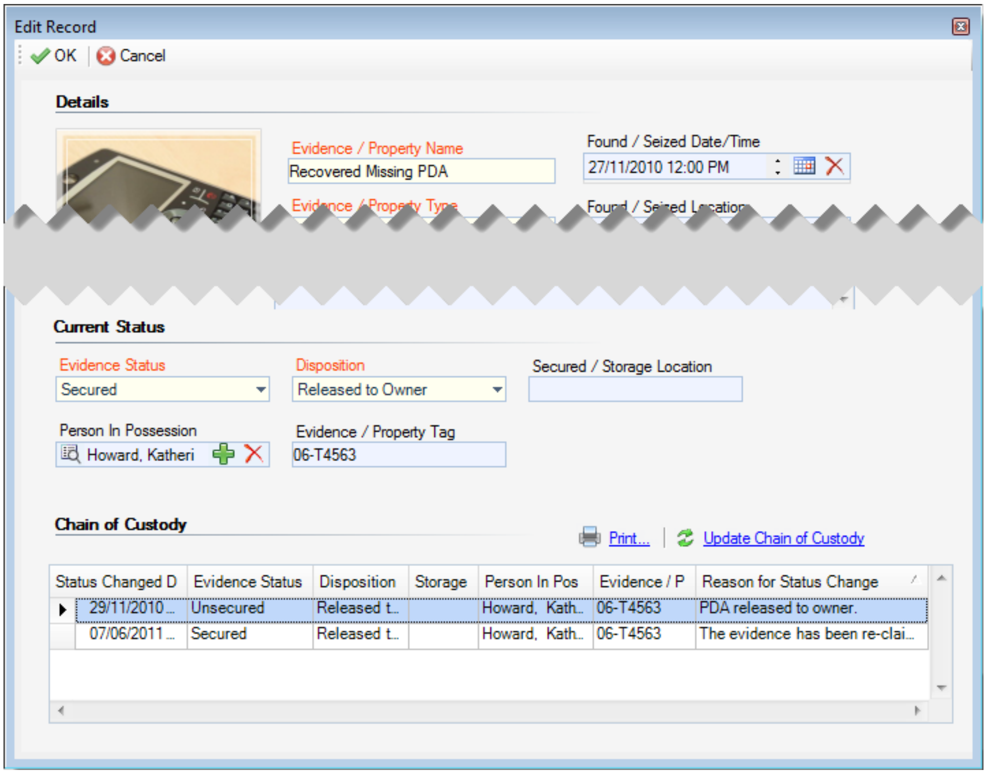
2. By default, the current date will appear in the **Status Changed Date/Time** field. Modify this if the item's status actually changed at an earlier date.

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



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

5. If you wish to print the Chain of Custody list, click the **Print** hyperlink. Note that the Chain of Custody is not included in the Investigation Report. Therefore, this printing option is only available via the Evidence/Property sub-tab.



View an incident's key investigative data summary

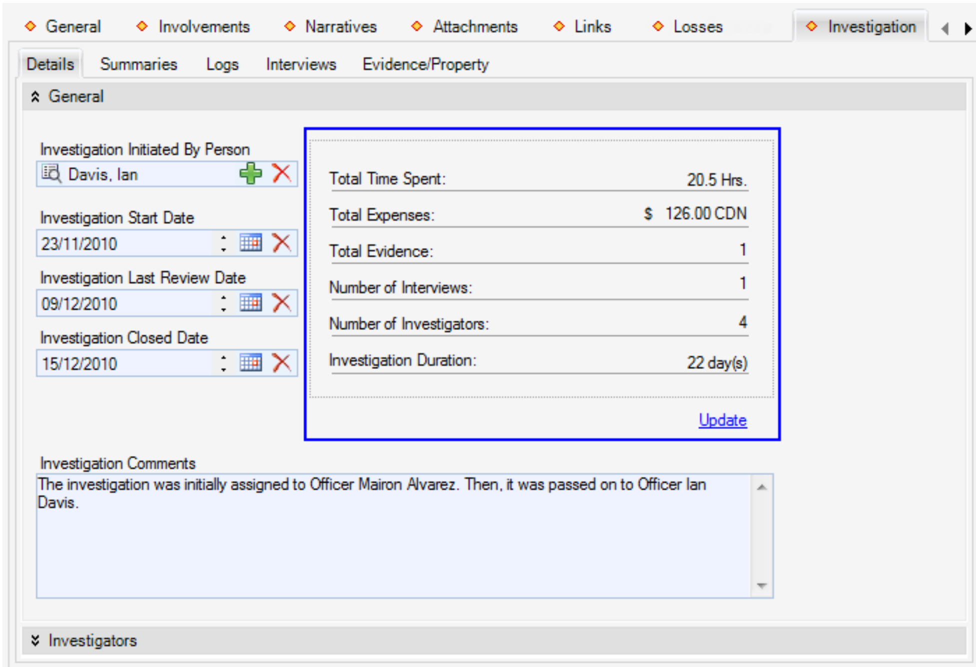
1. Access the **Investigation** tab, the **Details** sub-tab. The incident's key investigative data will be displayed in the form of a table next to the general details of the investigation:

    - ***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).

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

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

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



Control a record's processing options

Set the security controls and status of a record

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

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

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

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

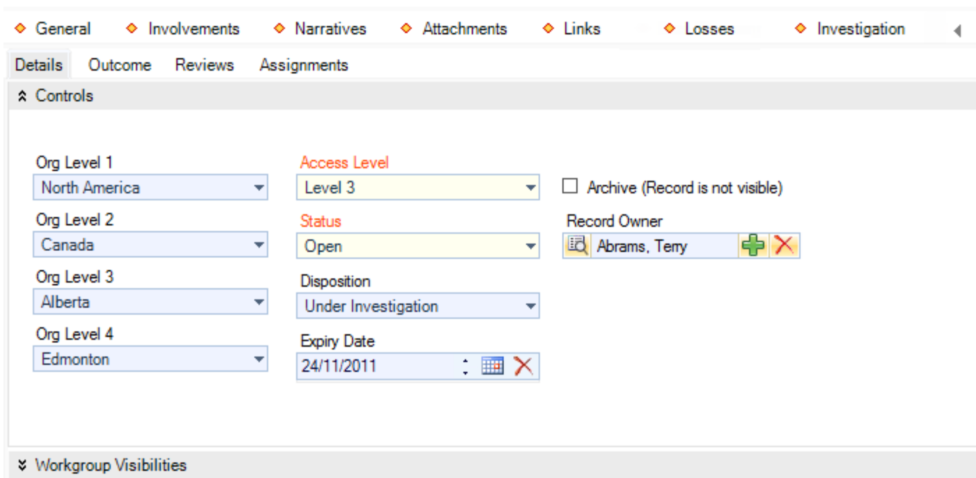
4. If you wish to archive the record making it unavailable for users to access, check the **"Archive (Record is not visible)"** box.

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 that 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.



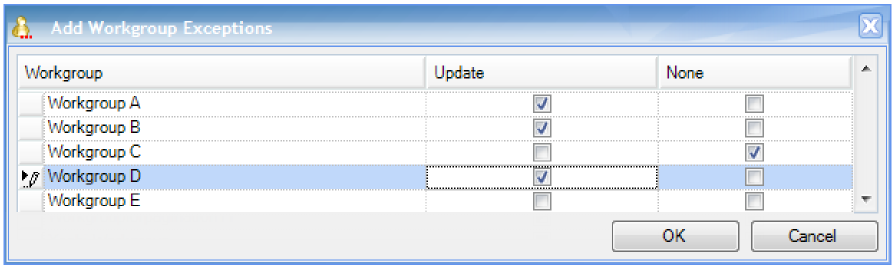
Define which workgroups can access a record

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. Click OK, if the change was intentional.

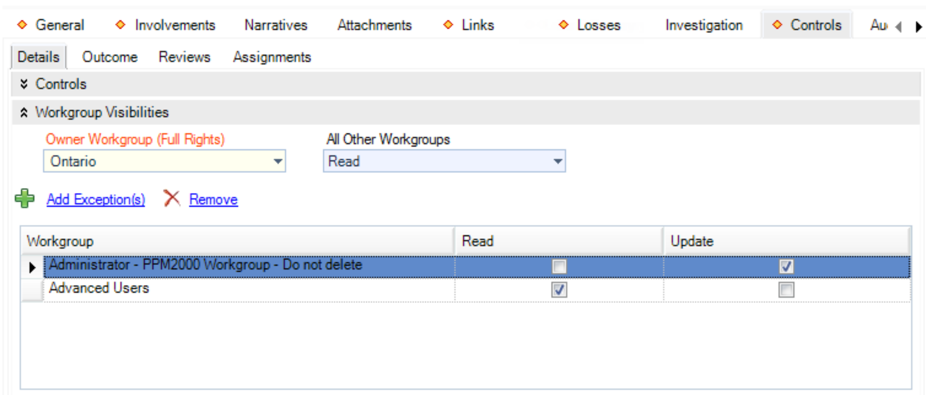
2. Determine the access right for **All Other Workgroups**, selecting from the *Read, Update* or *None* access right options.

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

4. 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 that workgroup visibility exceptions override the access settings assigned under All Other Workgroups.



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



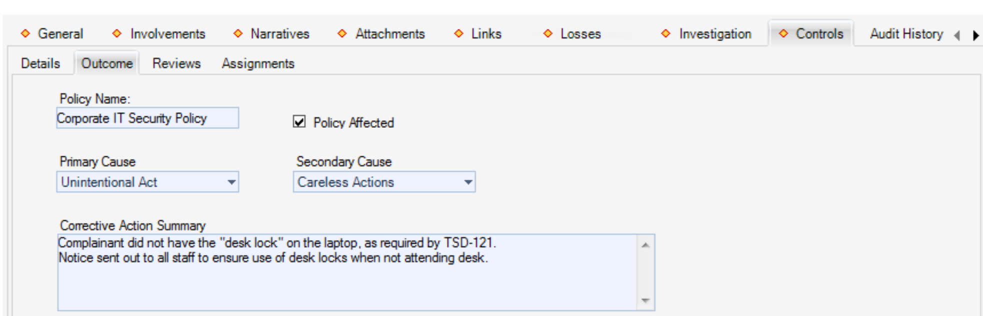
Describe the incident's causes and consequences

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

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

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

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



Document a record-related review

1. Open the **Reviews** sub-tab.

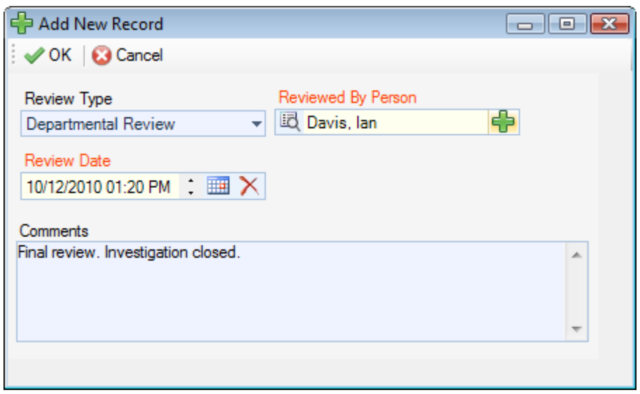
2. Click **Add New**. A pop-up window will open.

3. Choose the applicable description from the **Review Type** lookup list.

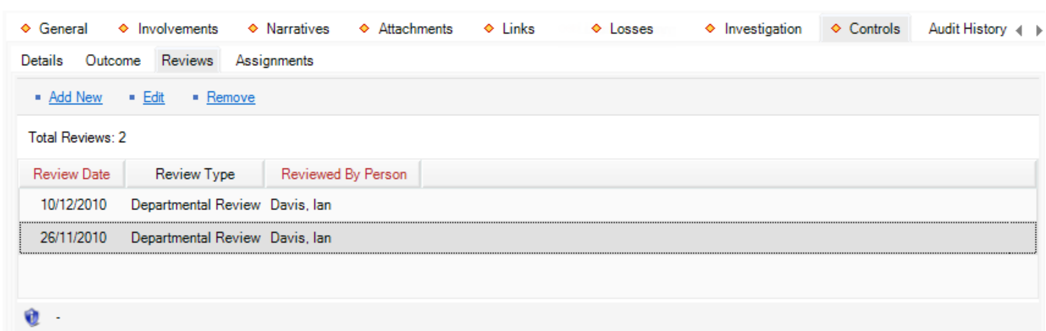
4. By default, your name will appear in the **Reviewed By Person** field. If you are not the person who conducted the review, select the applicable person from the pick list.

5. Enter the date and time that the review was completed in the **Review Date** field.

6. Enter observations, results, notes or other details pertaining to the review in the **Comments** box.



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



Give a record-related assignment to another user

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

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

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

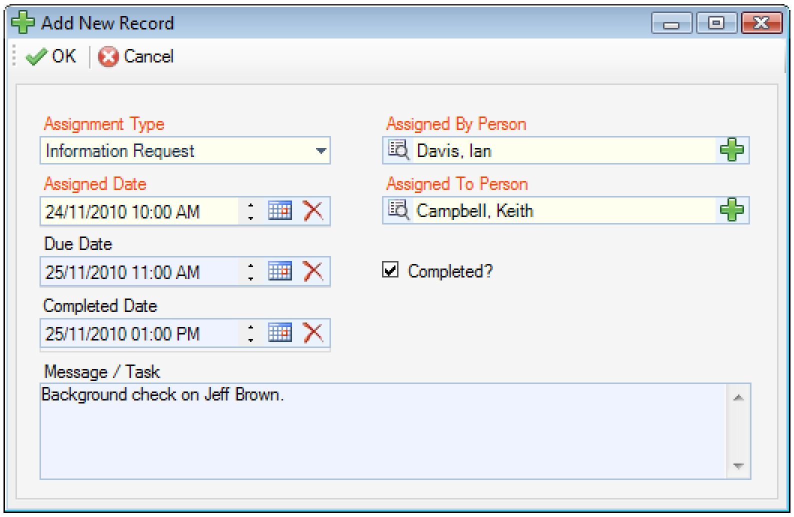
4. By default, your name will appear in the **Assigned By Person** field. If you are not the person who created the assignment, select the applicable person from the pick list.

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

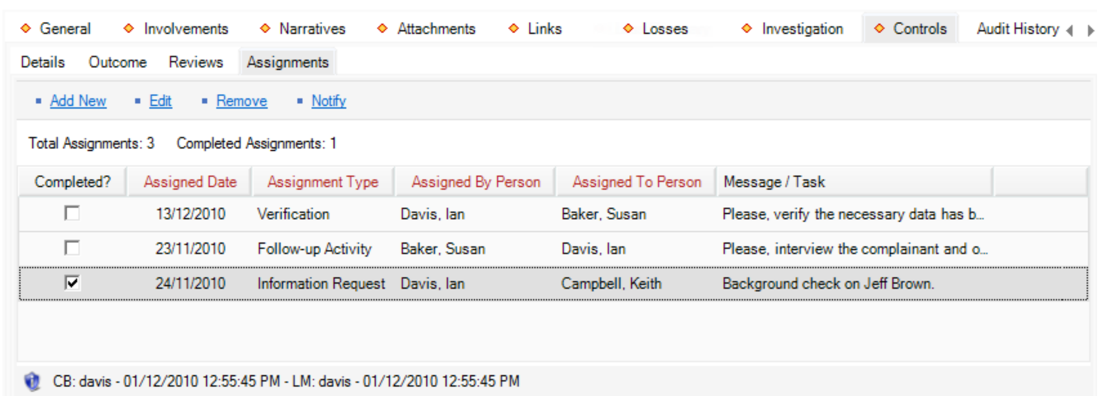
6. Complete the **Assigned Date**, and enter the date the assignment must be completed under **Due Date**.

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

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



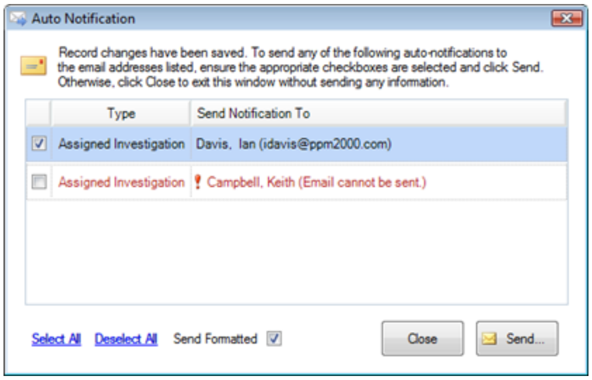
9. Click **OK**. The new assignment will be added to the Assignments grid.



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

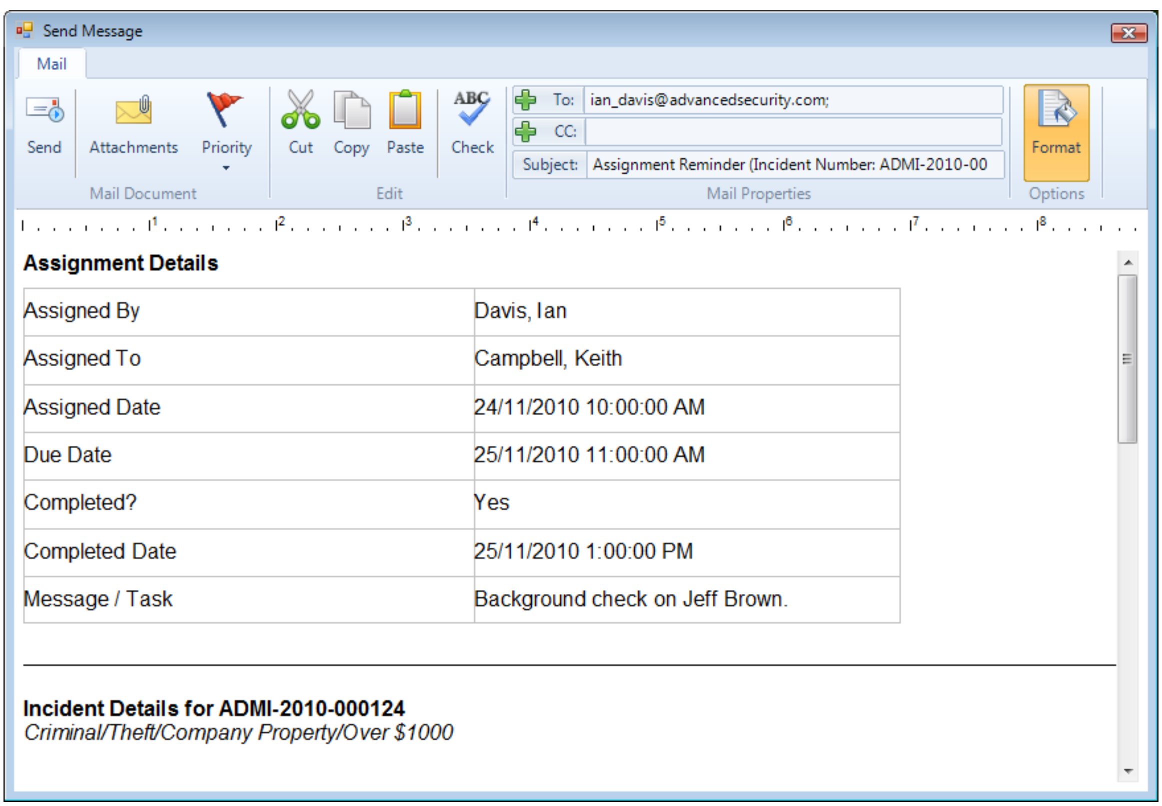
   - To send email notifications of the assignments to the Assigned To Persons and/or of the completed assignments to the Assigned By Persons, ensure the appropriate checkboxes are selected and click **Send**. Notifications are automatically sent in HTML. De-selecting the **Send Formatted** box, prior to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

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



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

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

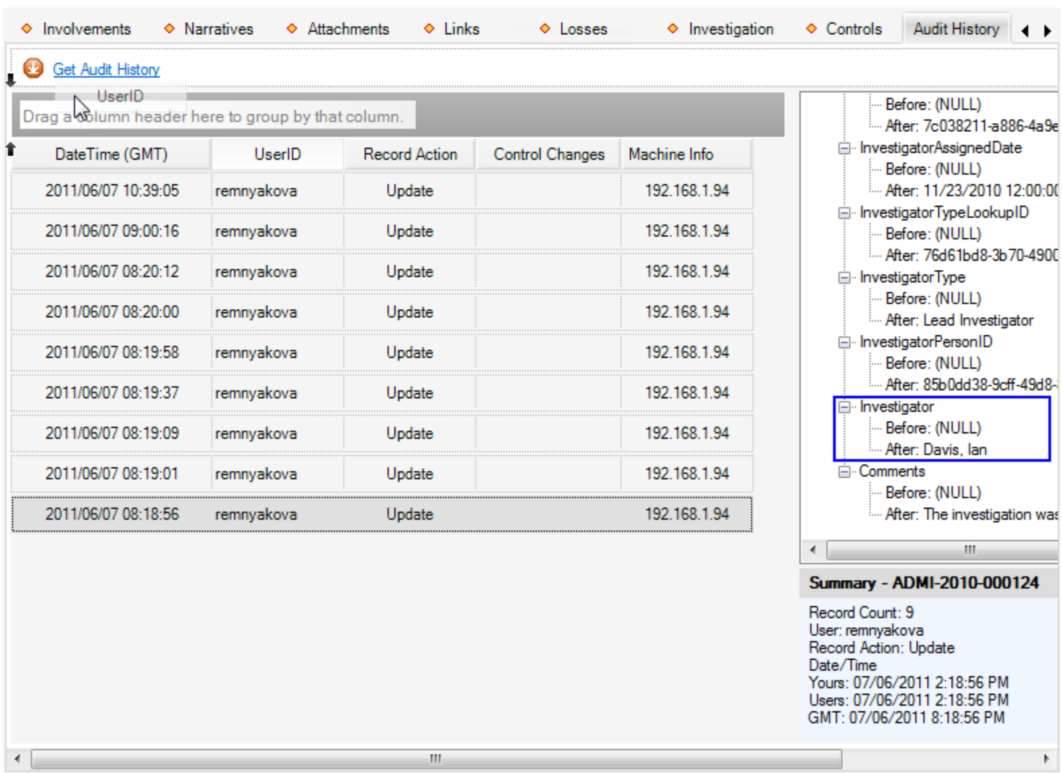


Track changes made to a record

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

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

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



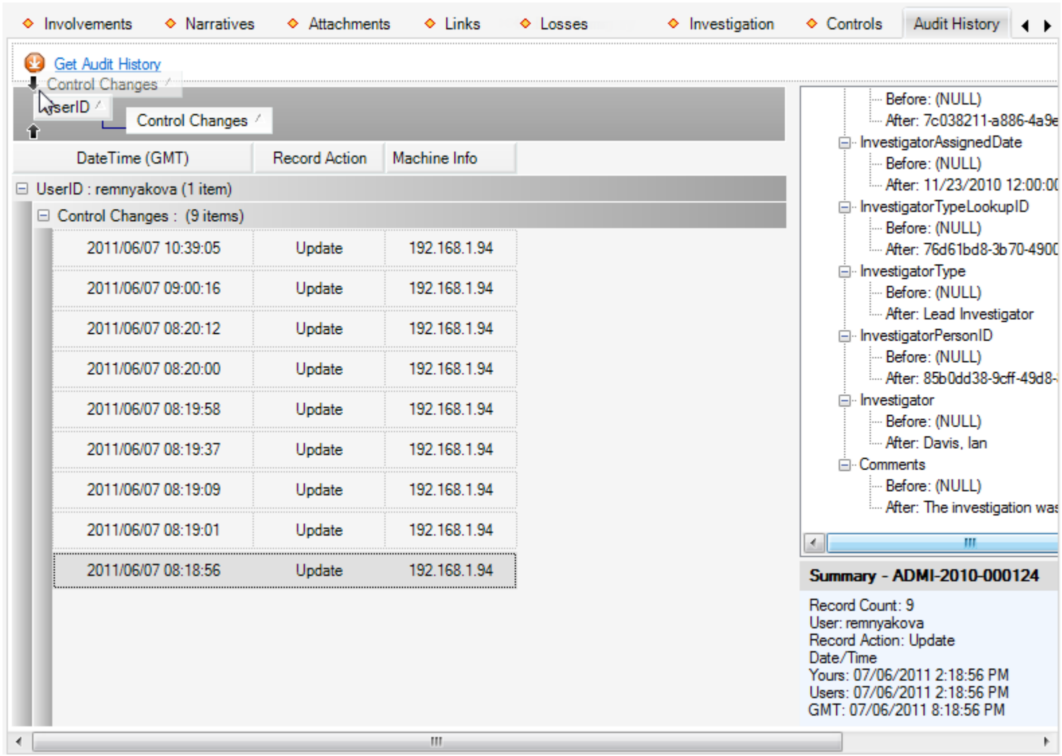
3. Select an entry to view *further details* in the Audit tree displayed on the right.

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

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

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

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



Cases

Note: The Case component is only available in the Premium Edition 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. Therefore, many operations implied in completing a Case data form require you to choose if you would like to add data to the currently open Case record, or to an Incident that is linked to the currently open Case record.

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

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

Create a new Case record

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

2. Give the case a descriptive **Case Name**.

3. Identify the general classification of the case under **Case Category**.

4. Indicate when the case was opened under **Case Start Date**.

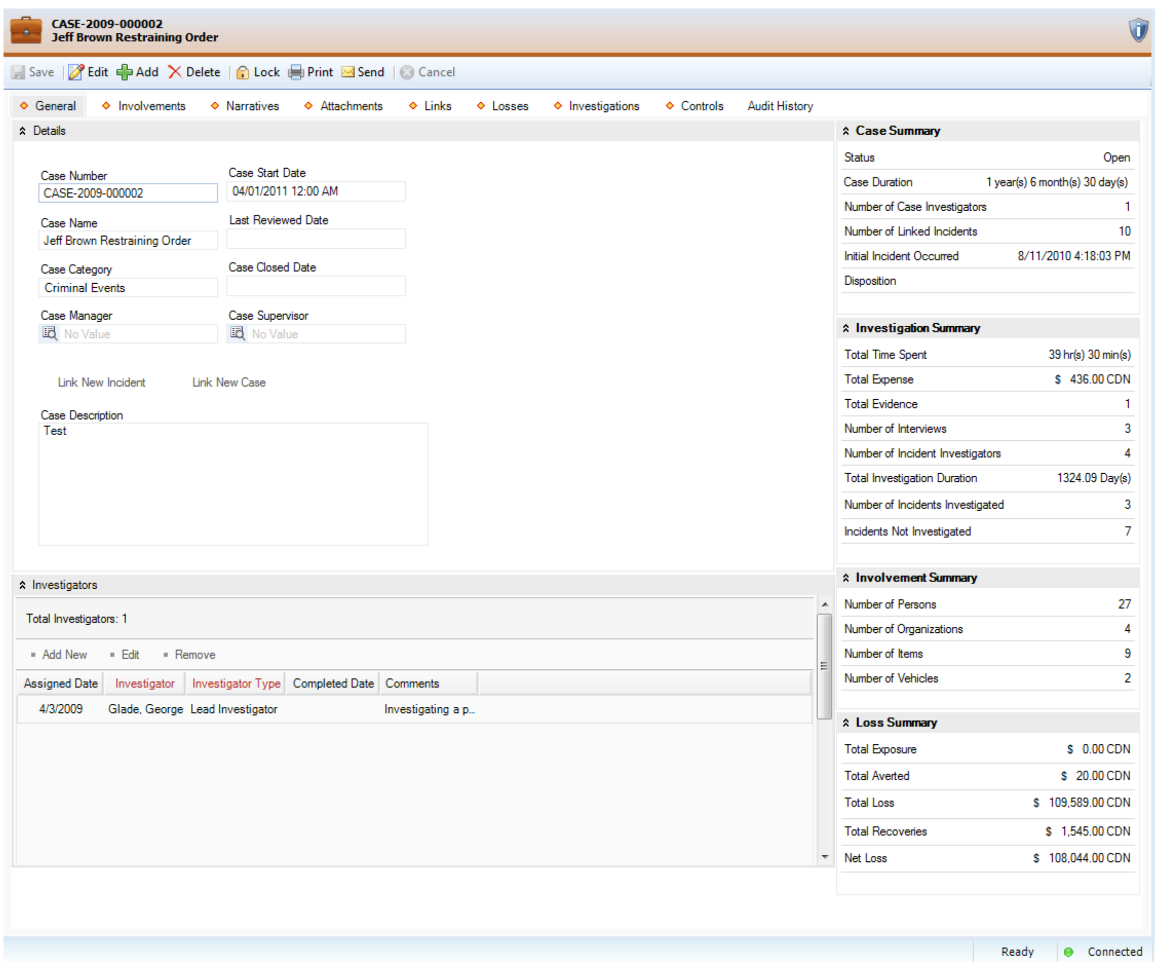
5. If the case has undergone a review, enter the applicable date in the **Last Reviewed Date** field.

6. When the case has been closed, enter this date in the **Case Closed Date** field.

7. Select the name of the **Case Manager**, as well as the **Case Supervisor**, from the applicable pick list fields.

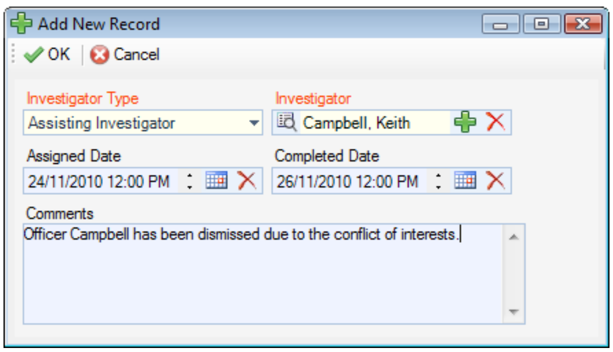
8. Type a very brief overview of the case in the **Case Description** box. To enter a more detailed description of the case, use the Narratives tab.

9. Perspective will automatically assign the case a **Case Number** when the record is saved.

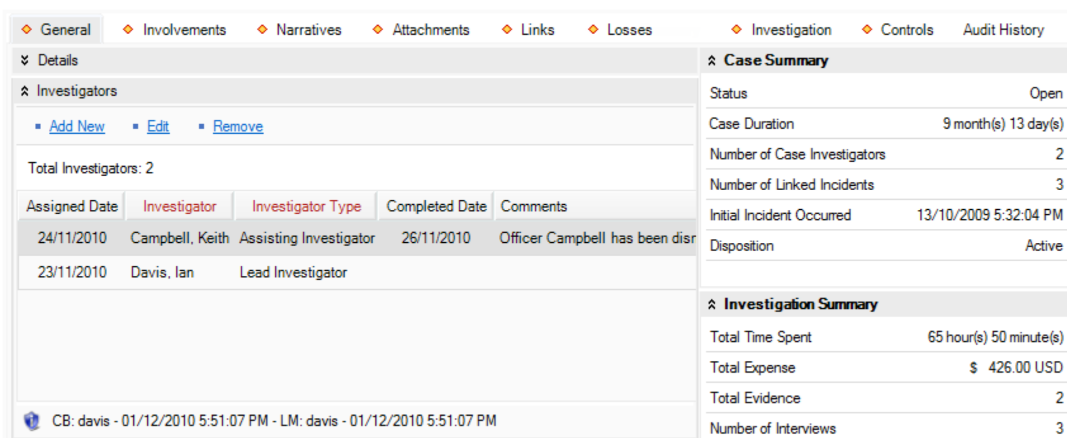


Assign an investigator to a case's investigation

1. In the **Investigators** section of the **General** tab, click **Add New**. A pop-up window will open.
2. Specify the applicable role of the investigator in the **Investigator Type** field (e.g., Lead Investigator, Assisting Investigator, Forensic Specialist, etc.).
3. Select the name of the investigator from the **Investigator** pick list.
4. In the **Assigned Date** field, enter the date and time the person was assigned to the investigation team.
5. If the investigator is removed from the investigation team at some point, you may enter the applicable date and time in the **Completed Date** field.
6. Enter any relevant notes in the **Comments** field.

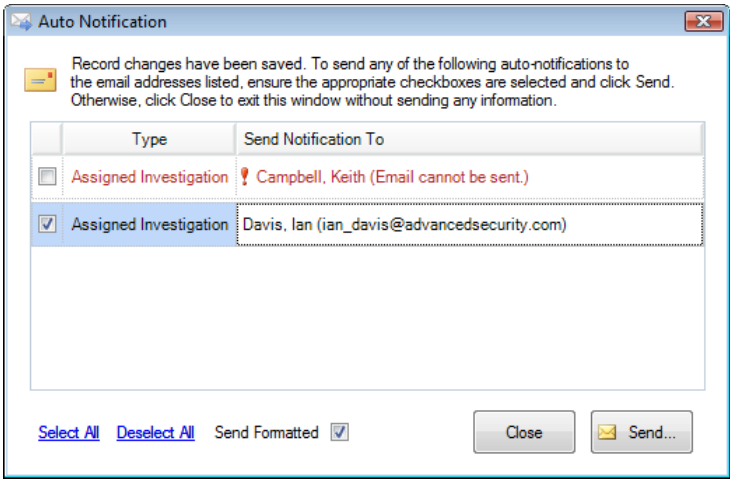


7. Click **OK** and proceed to enter as many investigators as necessary.



8. If you save the Case record changes at the time of entering a new Investigator, an Auto Notification pop-up window will appear.
   - To send an email notification of the assigned investigation to the investigators, ensure the appropriate checkboxes are selected and click **Send**. Notifications are automatically sent in HTML. De-selecting the **Send Formatted** box, prior to clicking Send, will format the notification details in plain text rather than the default HTML table.

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



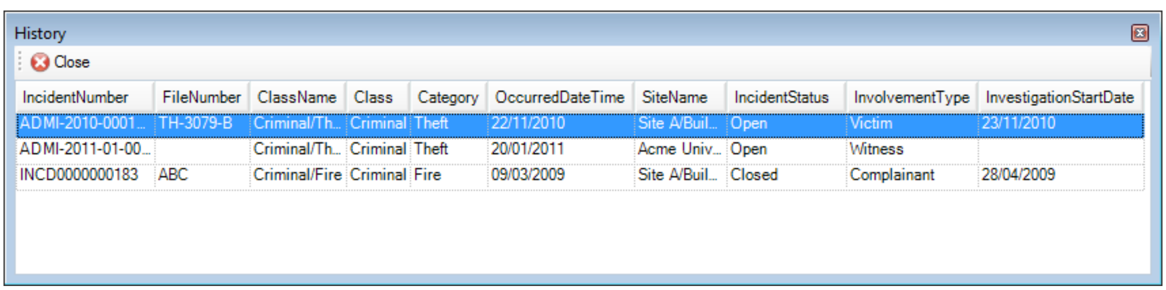
View all case's involvements

1. Open the **Involvements** tab.

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

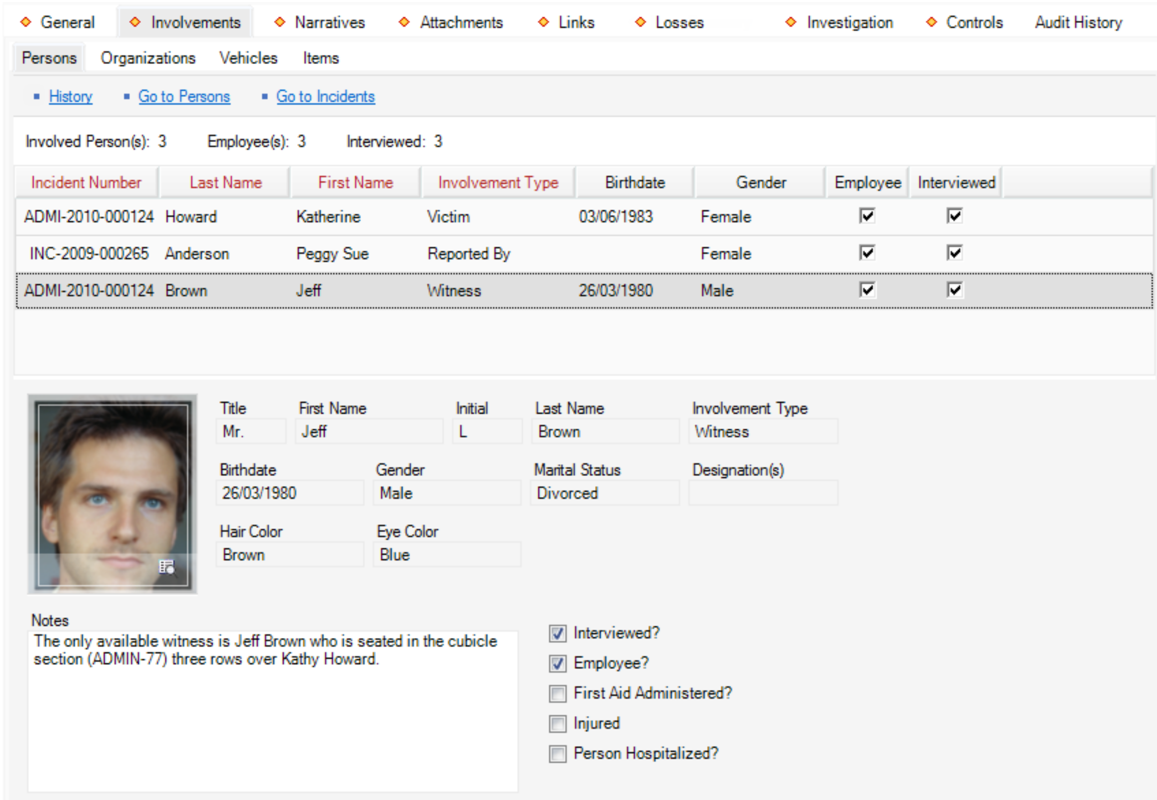
3. Select an entity in the grid to display its details in the form at the bottom of the window.

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



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

6. To transfer to an entity's Involvement sub-form 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.



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" chapter in the "Incidents" section.

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" chapter in the "Incidents" section.

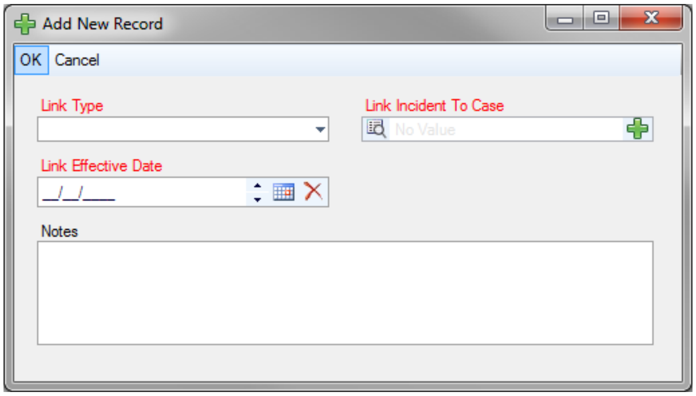
Link an incident to a case

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

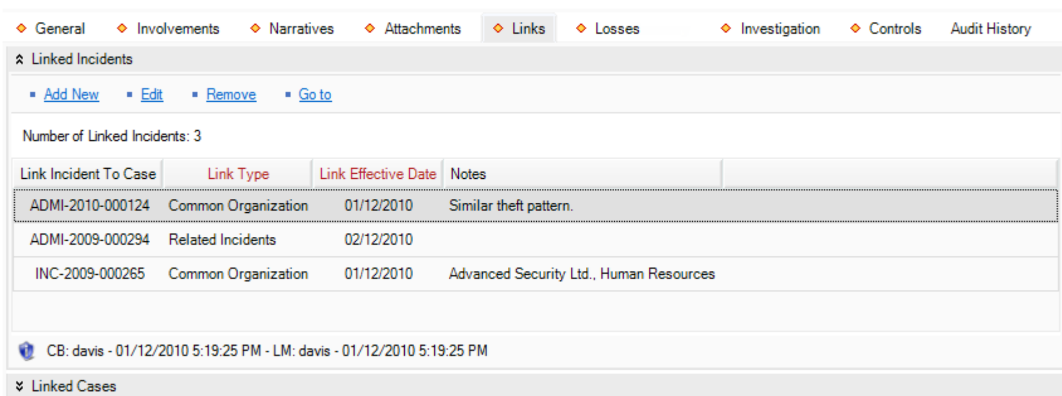
1. Select the **Links** tab.
2. In the **Linked Incidents** section, click **Add New**. A pop-up window will open.
3. Specify how the incident and the case are related in the **Link Type** field (e.g., Common Suspect, Similar M.O.).
4. Select the appropriate incident from the **Link Incident To Case** pick list.
5. Indicate the date that the incident became associated with the case in the **Link Effective Date** field.

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

7. Click **OK**.



8. After saving, the created link will be automatically cross-referenced in the linked Incident record under the Links tab. Note that the data contained in the linked Incident record (including Involvements, Narratives, Attachments, Investigation and Loss Summary) will be automatically imported into your Case record. This will be reflected in the Summary section on the right side of the Viewing pane under the General tab.



Link a case to another case

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

1. Select the **Links** tab.

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

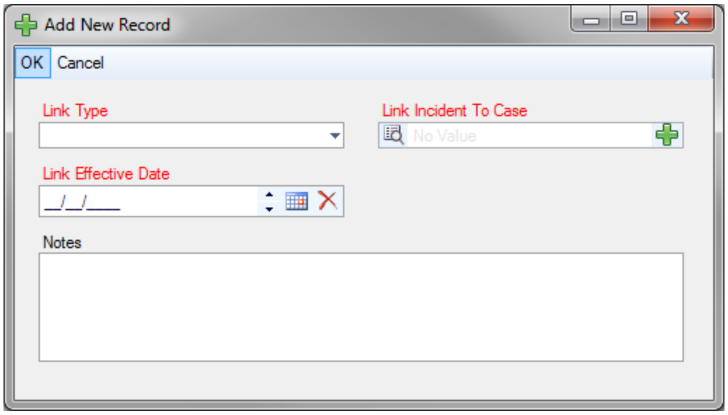
3. Specify how the two cases are related in the **Link Type** field (e.g., Common Suspect, Similar M.O.).

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

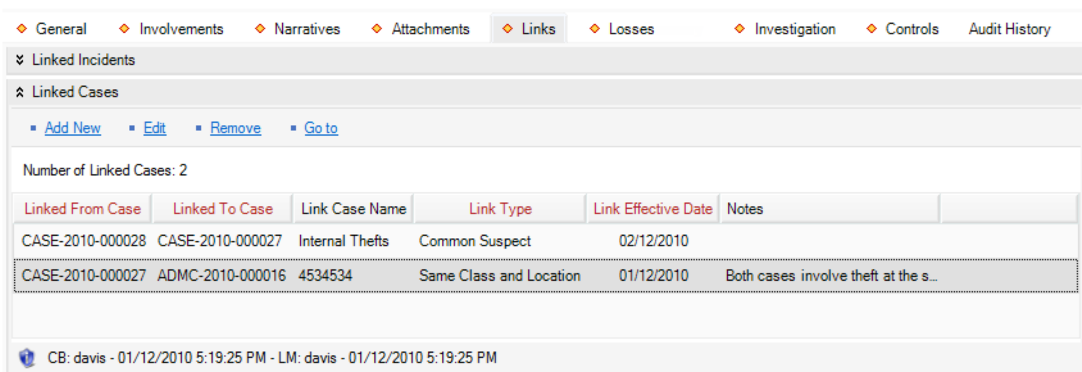
5. Indicate the date that the two cases became associated with each other in the **Link Effective Date** field.

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

7. Click **OK**.



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



View a summary of losses involved in a case

1. Select the **Losses** tab.

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

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

   - **Totals:**

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

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

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

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

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

- **Averages:**

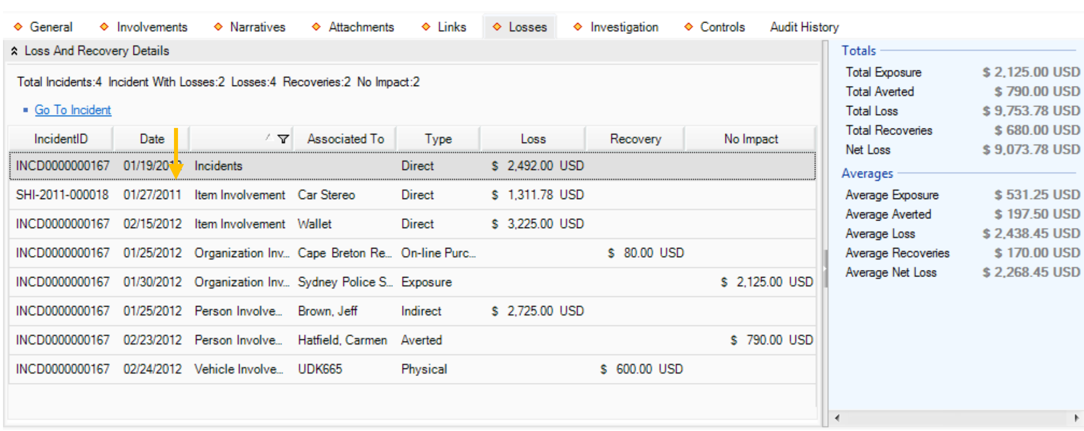
  Average Exposure: The average value of the *Exposure No Impact* loss across the Incident records linked to the case (i.e., *Total Exposure* divided by *Total Incidents*).

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

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

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

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



View and record case investigation data

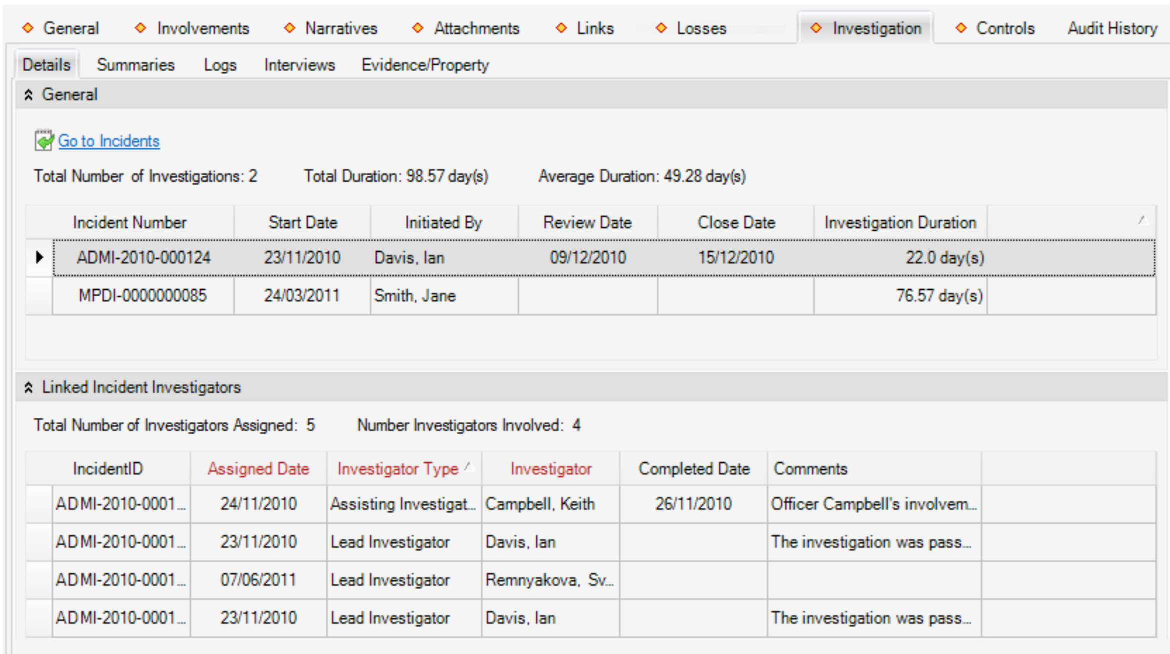
View key investigative data from a case's linked incidents

Access the **Investigation** tab and select the **Details** sub-tab.

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

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

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



Summarize a case's investigation or the investigation of an incident linked to a case

Open the **Investigation** tab, the **Summaries** sub-tab, and complete the operation, as described in the "Summarize an incident's or a case's investigation" chapter in the "Incidents" section.

Log investigative tasks and expenses for a case or an incident linked to a case

Open the **Investigation** tab, the **Logs** sub-tab, and complete the operation, as described in the "Log investigative tasks and expenses" chapter in the "Incidents" section. 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

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

Track investigation evidence for a case or an incident linked to a case

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

Control a Case record's processing options

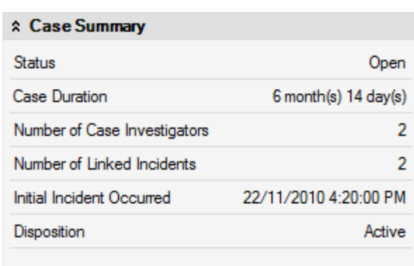
For control options available for Case records, refer to the "Control record's processing options" chapter. Note that the option to describe an occurrence's causes and consequences under the Outcome sub-tab is only available within the Incidents component, and is absent on a Case form.

View a quick summary of a case's key data

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

Case Summary

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



Investigation Summary

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

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

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

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

Involvement Summary

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

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

- ***Number of Vehicles***: The total number of involved vehicles from all the incidents linked to the case, drawn from the Vehicles sub-tab.

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" chapter in the "Incidents" section.

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, too.

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

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

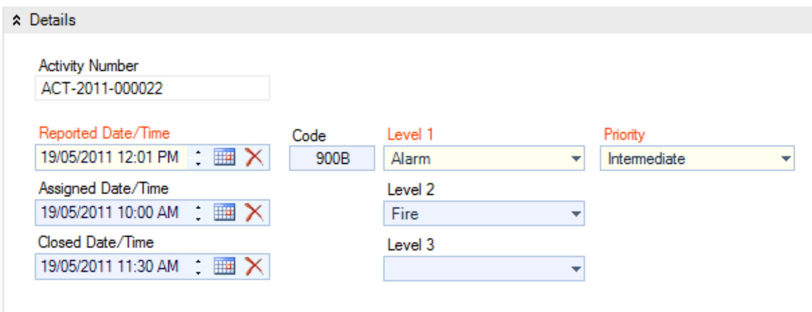
3. Indicate when the activity call was assigned to an officer or organization under **Assigned Date/Time**.

4. Select the activity category under the **Level 1**, **Level 2** and **Level 3** lookups. These fields are hierarchical, meaning that the option selected in the first field (i.e., Level 1) determines the options that are available in the second field (i.e., Level 2) and so on. The options that appear in these lists have been customized by your organization.

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

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

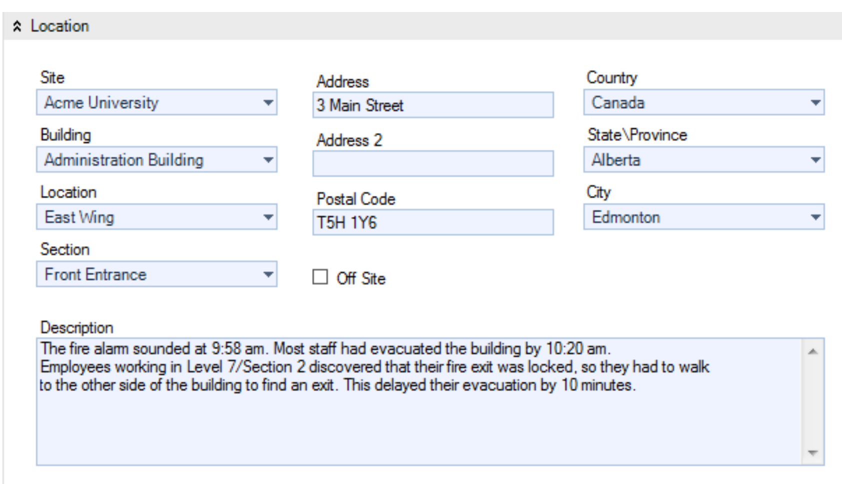
7. If the activity has been closed, enter the date of its closure in the **Closed Date/Time** field. For the Activity records that have previously been closed within the DispatchLog, this field will already contain the date of closure.



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

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

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



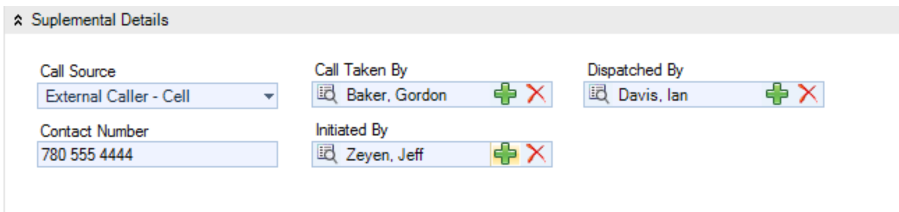
11. In the Supplemental Details section, select the **Call Source** for the activity (e.g., Alarm, External Caller – Cell, etc.).

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

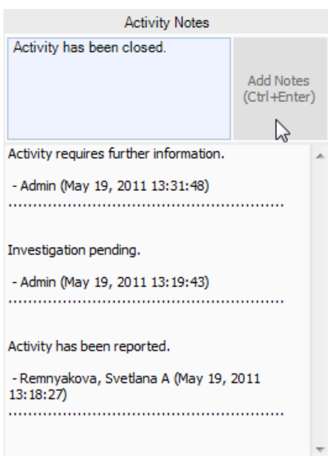
- **Call Taken By**—The user who is responsible for recording the call. Usually, the call taker is the person who creates the original Activity record.

- **Initiated By**—The user who initiated the call and provided basic information for creation of the activity. Enter the initiator's **Contact Number** in the field on the left.

- **Dispatched By**—The person who dispatches officers/organizations for the activity.



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



14. 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, **Officer Responses** sub-tab.

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

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

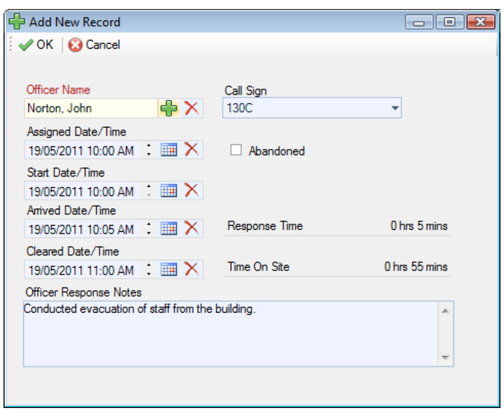
4. The **Call Sign** field will auto-populate with the selected officer's call sign abbreviation.

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

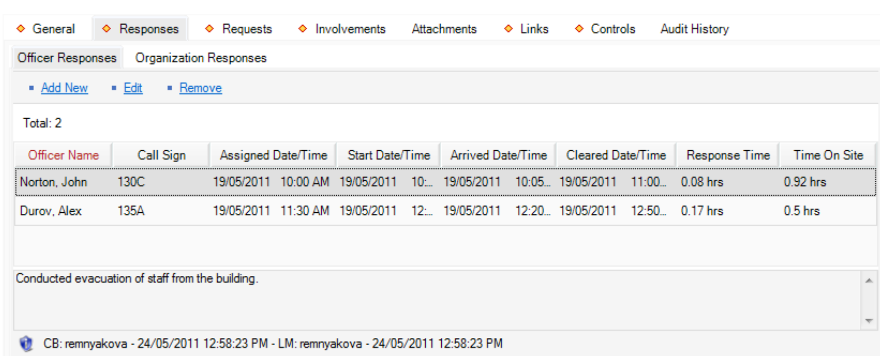
   - **Assigned Date/Time**—The date and time when the officer was dispatched for the activity.
   - Check the **Abandoned** box if the officer has been assigned to the activity, but did not manage to carry out the response tasks due to the re-assignment for another activity or the fact that they did not 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.

6. 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**).

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



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



Record an organization's response to an activity

1. Select the **Responses** tab, **Organization Responses** sub-tab.

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

3. 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.

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

6. 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.

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

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

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

10. 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.

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 Quick Add to create one.

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

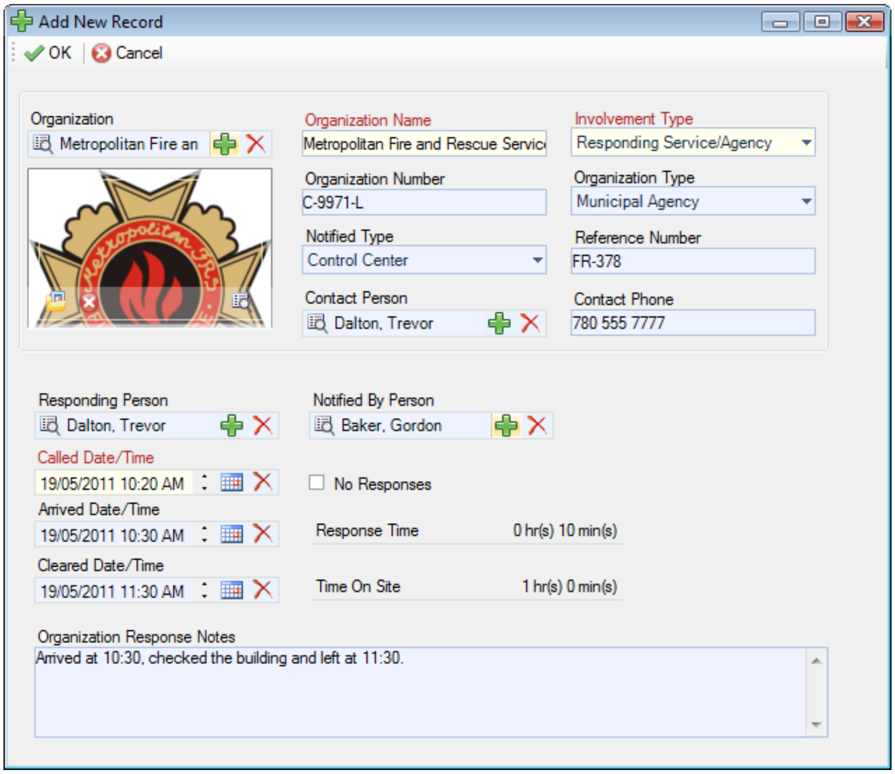
13. Select the record of the person in the organization who responded to the activity from the **Responding Person** pick list and the record of the person who called the organization from the **Notified By Person** pick list. If a Person record does not already exist for the individual, use the Quick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

14. Track the temporal progress of the organization's 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.

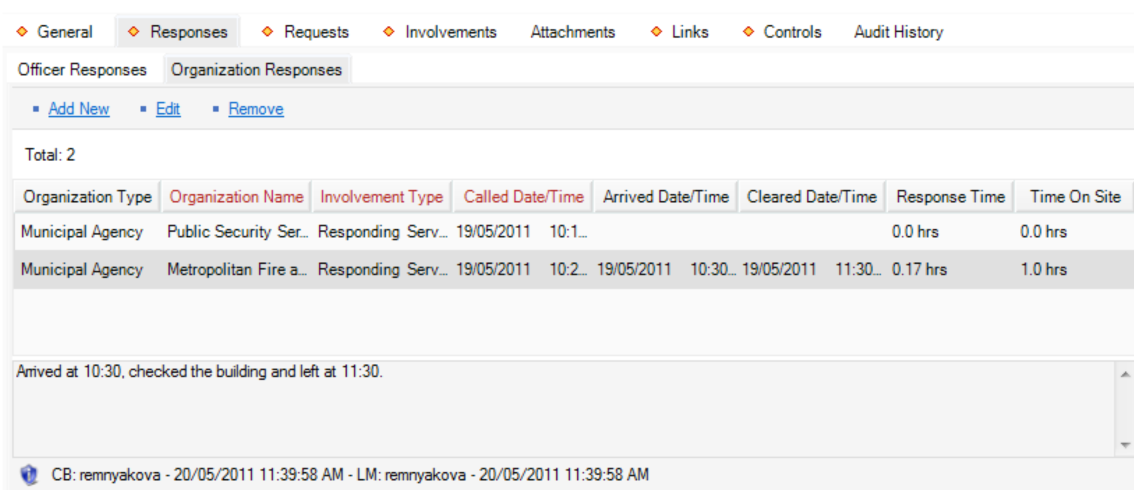
- **Cleared Date/Time**—The date and time when the responding organization vacated the site after having had completed the response.



15. 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**).

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

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



Note an action request for an activity

1. Select the **Requests** tab.

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

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

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

5. To add the organization’s **logo** to the record, click the Add icon in the image box. Locate the image file in the browser window and click Open.

6. Specify the type of services offered by the requested organization 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 the applicable **Organization Type** from the lookup list.

9. 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).

10. Note the organization’s associated **Reference Number**.

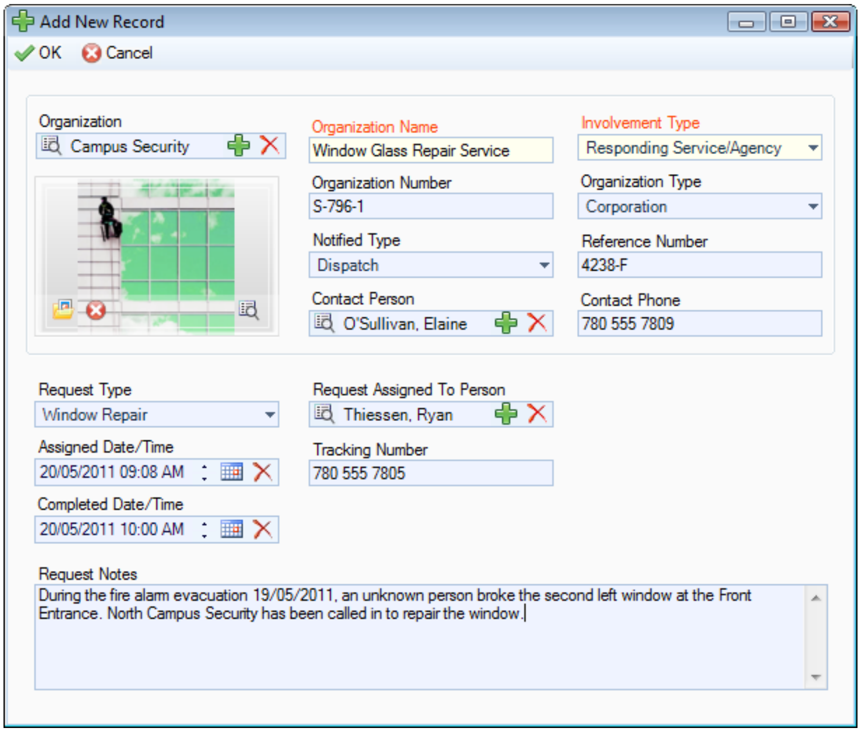
11. Select the name of the requested organization’s primary contact from the **Contact Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one. Enter the contact person’s phone number under **Contact Phone**.

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

13. 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.

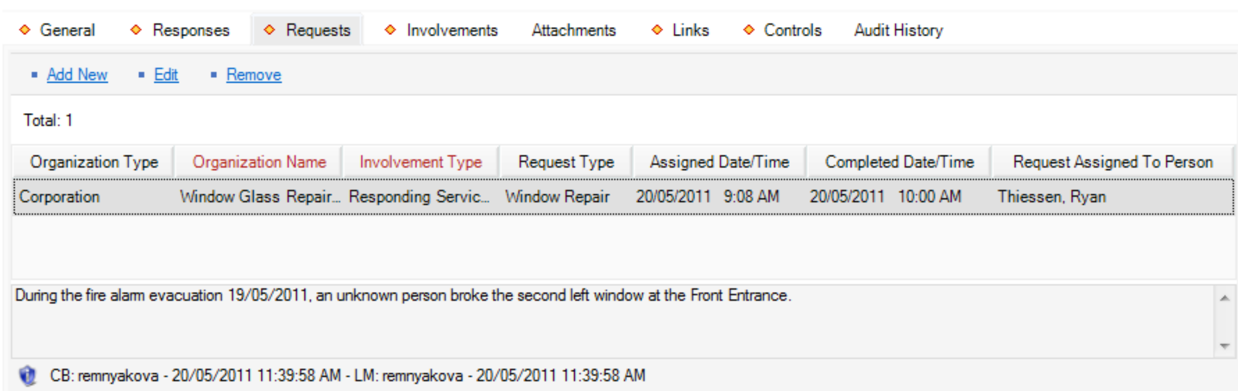
14. Enter the date and time the request was made in the **Assigned Date/Time** field. When the action is complete, input the **Completed Date/Time**.

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



16. Enter any additional **Request Notes**.

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



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" chapter.

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" chapter, the "Note general details of the organization" 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" chapter.

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" chapter.

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" chapter, the "Note general details of the vehicle" 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" chapter, the "Note general details of the item" section.

Attach a file to an Activity record

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

Link an activity to another activity

1. Select the **Links** tab, **Activity Links** sub-tab.

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

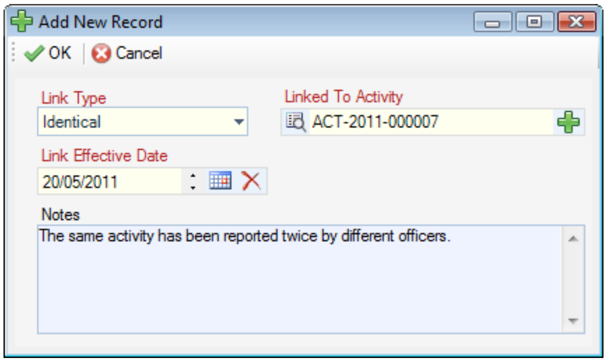
3. Specify how the two activities are related in the **Link Type** field (e.g., Identical, Common Location).

4. Select the activity that you wish to link to the open activity from the **Linked to Activity** pick list.

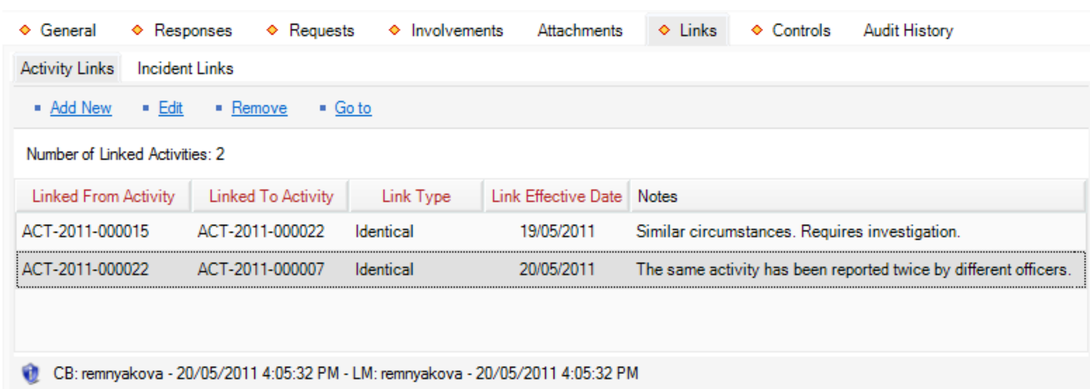
5. Indicate the date that the two activities became associated with each other in the **Link Effective Date** field.

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* Activity records under the Links tab. To review a complete record of an activity linked to the currently open activity, select the correct link from the list of Linked Activities and click **Go To**.



Link an activity to an incident

1. Select the **Links** tab, **Incident Links** sub-tab.

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

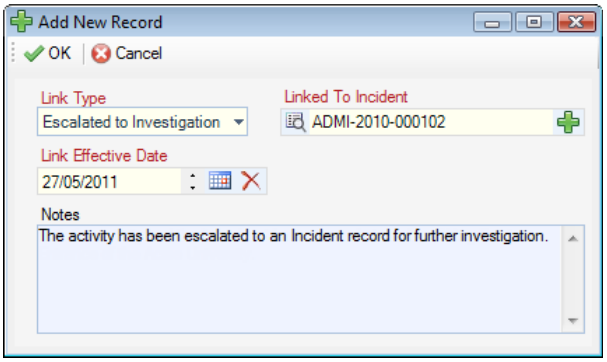
3. Specify how the activity and the incident are related in the **Link Type** field (e.g., Escalated to Investigation, Follow-up).

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

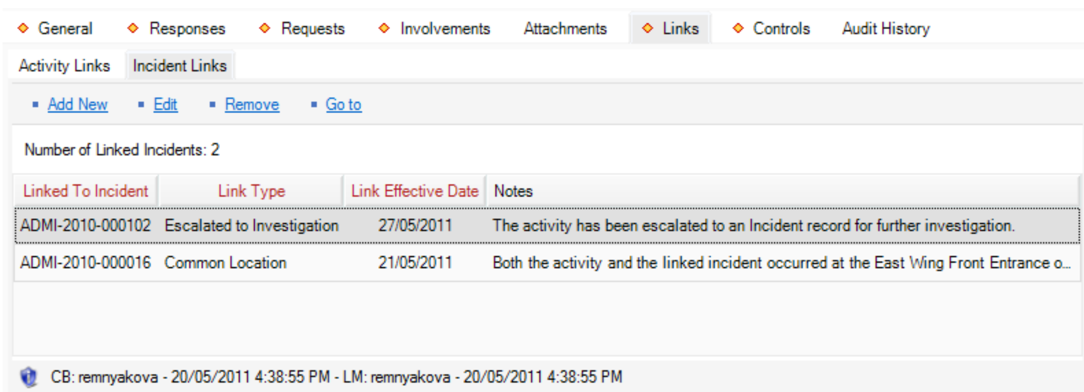
5. Indicate the date that the activity became associated with the incident in the **Link Effective Date** field.

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

7. Click **OK**.



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



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.

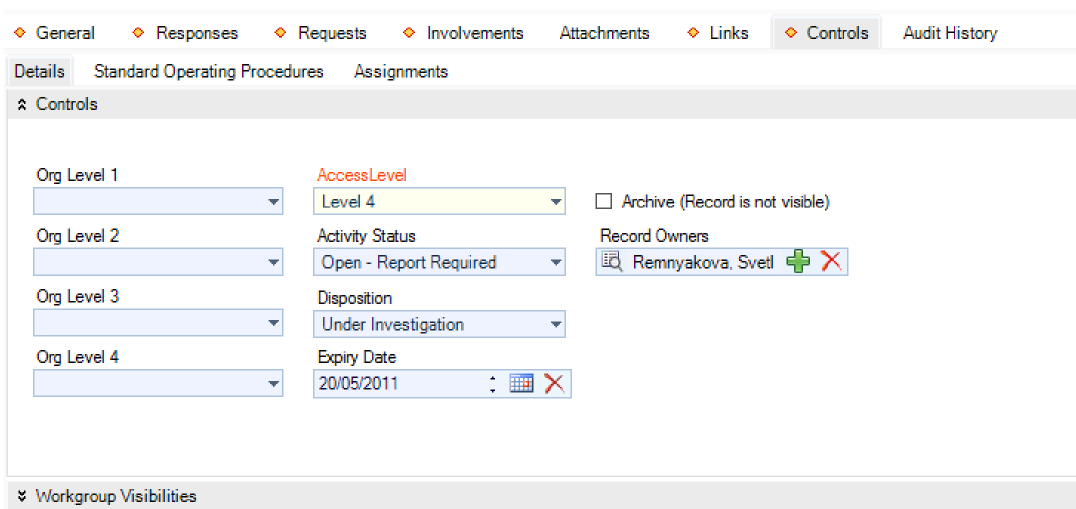
3. In the **Access Level** field, set the security level from 1 to 5. Each security level corresponds to a specific security description, such as "Classified". Only users with the same security Access Level as the one you select (or higher) will be able to view the record.

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 wish 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 that no information will automatically be deleted on this date; it is *for tracking purposes only*.



Define which workgroups can access the Activity record

In the **Workgroup Visibilities** section of the **Details** sub-tab, define access options for the record, as described in the "Incidents" section, the "Define which workgroups can access the record" chapter.

Review the Standard Operating Procedures for the Activity record's specifications

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

1. Select the **Controls** tab, the **Standard Operating Procedures** sub-tab.

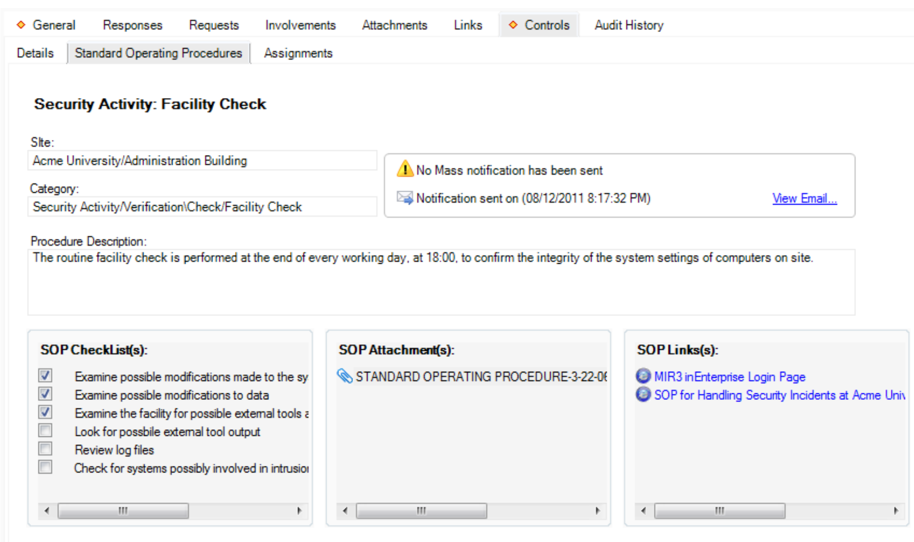
2. Review the **Procedure Description** of the Standard Operating Procedures (SOP) available for the activity's **Call Category**, **Site** and/or **Status**.

3. Check off the SOP procedures that have been completed under **SOP Checklist**, and click **Save**.

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

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

6. 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.



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 "Incidents" section, the "Give a record-related assignment to another user" chapter.

Track changes made to an Activity record

Open the **Audit History** tab and complete the operation, as described in the "Incidents" section, the "Track changes made to a record" 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.

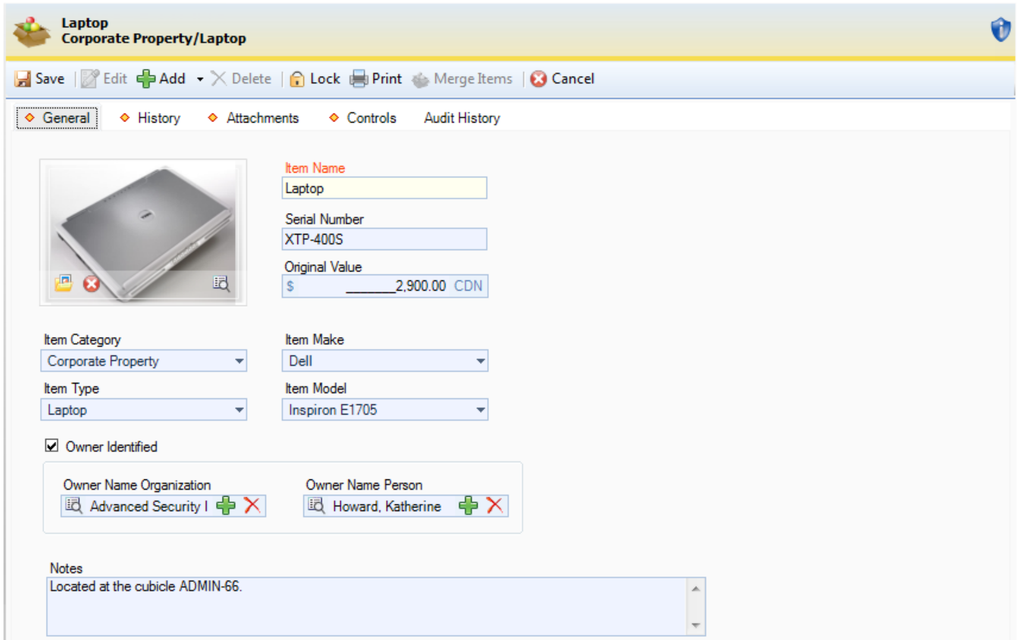
Click **Save** to assign the new Incident record an Incident Number and save it in the system. The fact of the new Incident record creation will be documented under the Audit History tab as a *New* record action. Note that the original Activity record will remain intact.

Items

Create a new Item record

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

1. Click the **Add** button on the Viewing pane toolbar.
2. Give the item a descriptive **Item Name**.
3. If known, type in the item's **Serial Number**.
4. Enter the item's exact or estimated value in the **Original Value** field.
5. Identify the general classification of the item by making selections from the **Item Category** and **Item Type** lookup lists. These fields are hierarchical.
6. Specify the **Item Make** and **Item Model**. These fields are hierarchical.
7. If the item's owner is known, check the **Owner Identified** box. 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.
8. Add comments about the item in the **Notes** field.
9. To add an **image** of the item to the record, click the Add icon in the image box. Locate the image file in the browser window and click Open.



To import a record from the Gateway, consult the "Import record's settings from the Gateway" chapter.

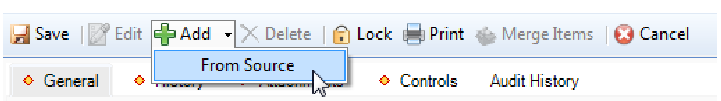
Import record's settings from the Gateway

Note: External record data can only be imported to the Gateway through the Import Manager.

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

1. Open the appropriate data form.

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



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

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

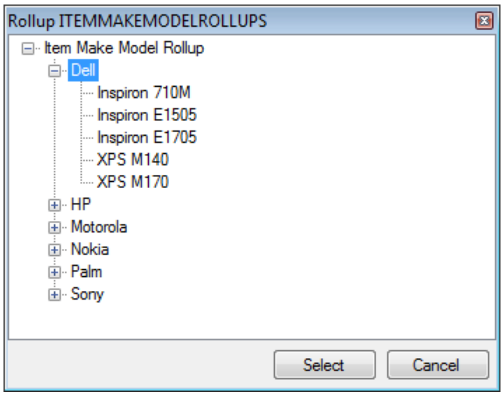
Note: Only items with the Available status in Gateway will be searched and displayed.

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

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

b. Choose an **Operator** for the field (e.g., =, <>, After, Begins With, Like, etc.).

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 that you may choose any node of the tree as the defining criterion, making your comparison value as narrow hierarchically as you wish.



d. If you wish 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 wish. To remove a field from your search criteria, click the Delete button.

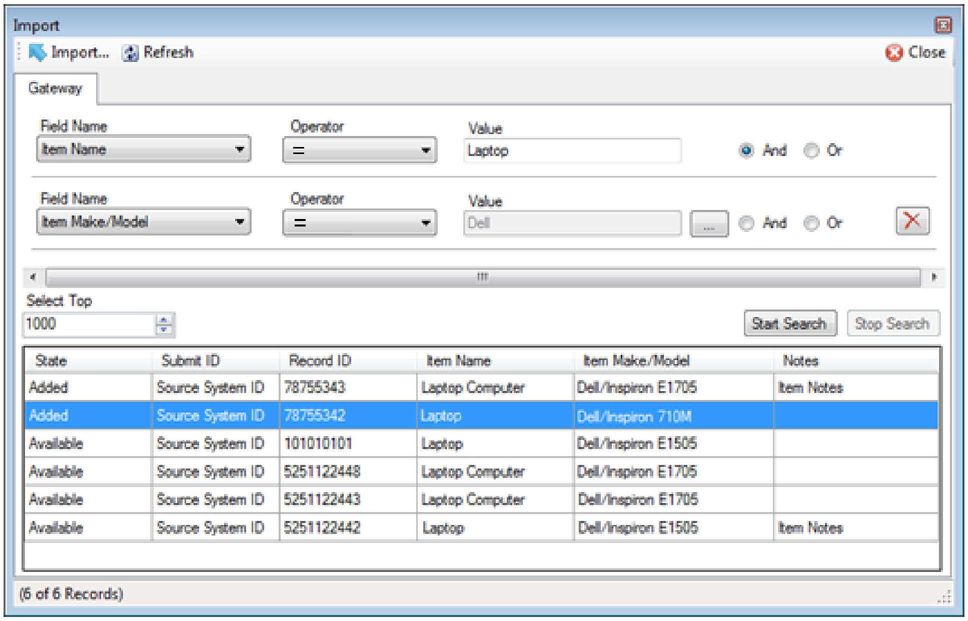
e. By default, your search will display the top 1000 imported records matching the criteria that you set. To display more or less than the top 1000 records, adjust the number in the **Select Top** field (from 1 to 2000).

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

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

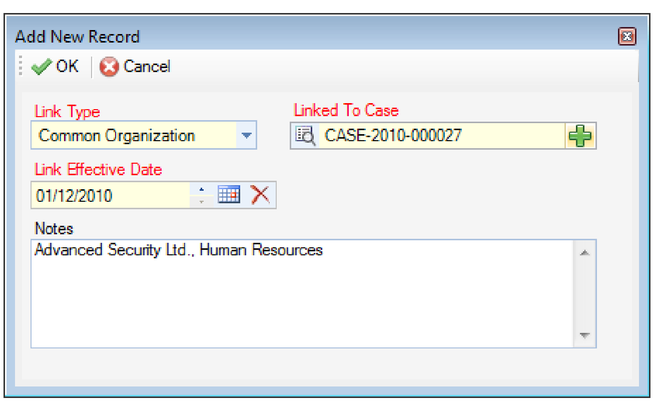
If you change your search criteria at some point, click **Refresh** to update the record list according to the changes made.

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

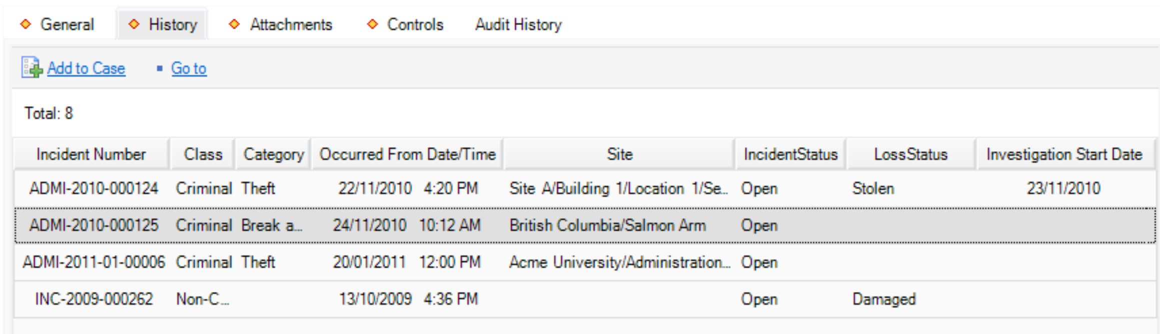


View record's incident involvements

1. Select the **History** tab. A list of all the incidents the record has been involved in will be displayed in the grid below.
2. To link all of an incident in the grid to a case (Perspective Premium 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 and Location, etc.).
4. Select the appropriate case from the **Linked to Case** pick list.
5. Indicate the date that the incidents became associated with the case in the **Link Effective Date** field.
6. Type any additional information about the link in the **Notes** field.
7. Click **OK.**



8. Click **Save**. Note that these links will automatically be cross-referenced in the linked case's record, as well as in each of the linked incidents' records, under the Links tab.



Attach a file to an Item record

Open the **Attachments** tab and complete the operation, as described in the "Incidents" section, the "Attach a file to a record" chapter of this guide.

Control record's processing options

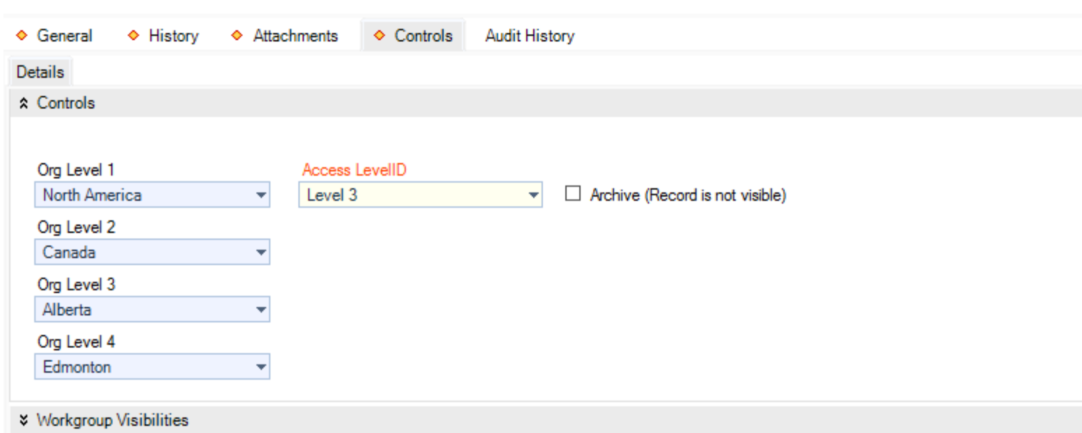
Set the security controls and status of the record

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

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

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

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



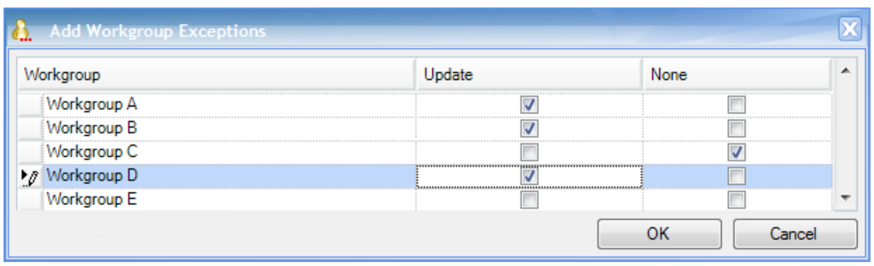
Define which workgroups can access the record

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

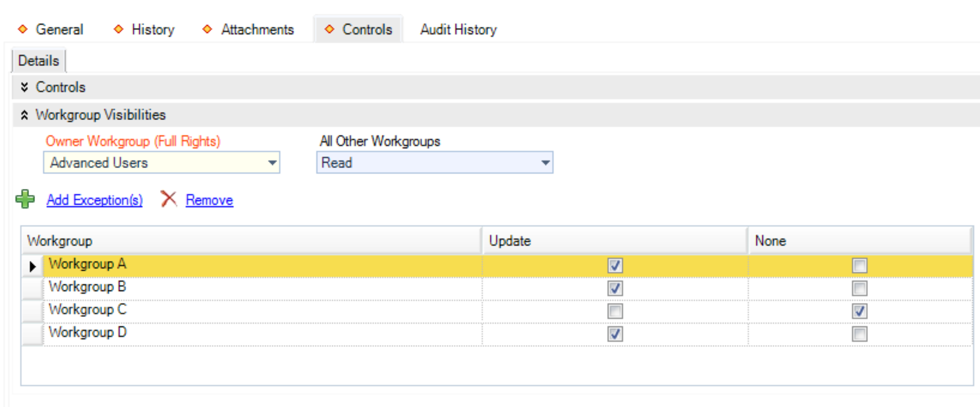
2. Determine the access right for **All Other Workgroups**, selecting from the *Read, Update* or *None* access right options.

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

   a. Select the workgroup and then select the workgroup's visibility for this record (*Read*, *Update* or *None*). Continue to customize workgroup visibility for as many workgroups as you like. Note that workgroup visibility exceptions override the access settings assigned under **All Other Workgroups**.



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



Track changes made to an Item record

Open the **Audit History** tab and complete the operation, as described in the "Incidents" section, the "Track changes made to a record" chapter of this guide.

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., Mrs., etc.) and **Designation** (e.g., B.Sc., Chartered Accountant, etc.).

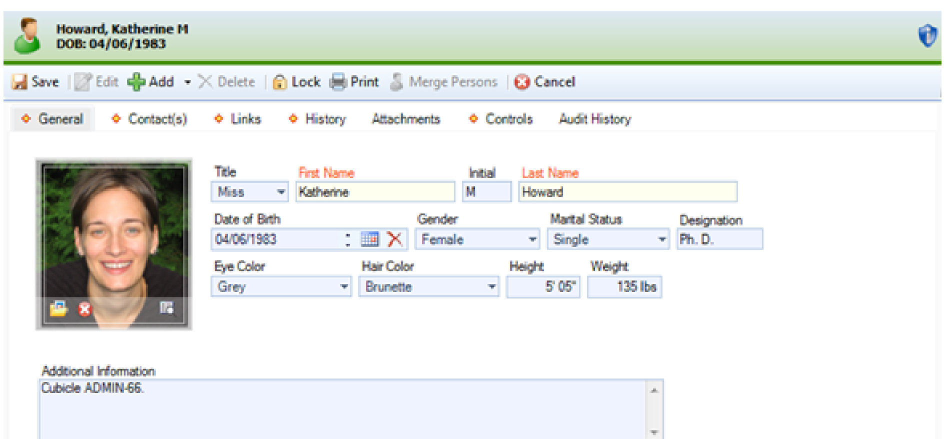
3. Type their **First Name**, **Last Name** and middle **Initial**.

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**.

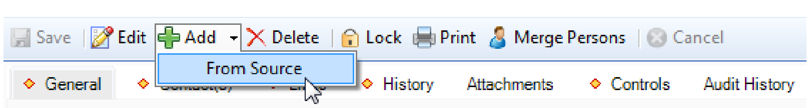
6. Add any other relevant personal information or notes in the **Additional Information** box.

7. To add a **photo** of the person to the record, click the Add icon in the image box. Locate the image file in the browser window and click Open.



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

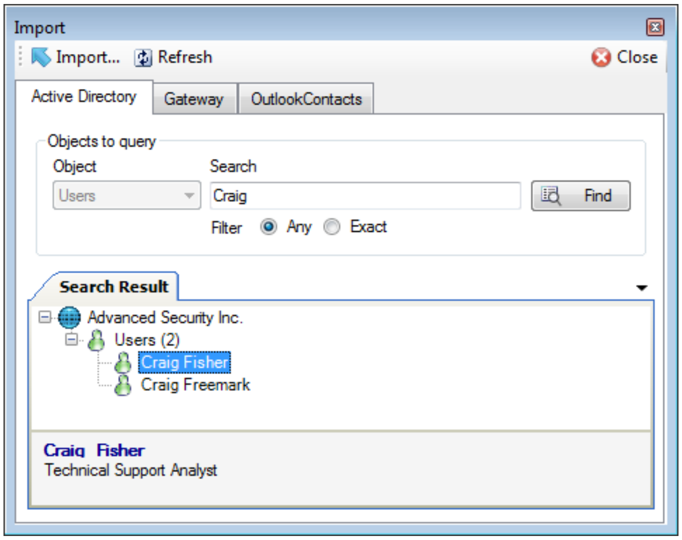
1. Click the down arrow to the right of the **Add** icon, and select **From Source**.



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

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

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



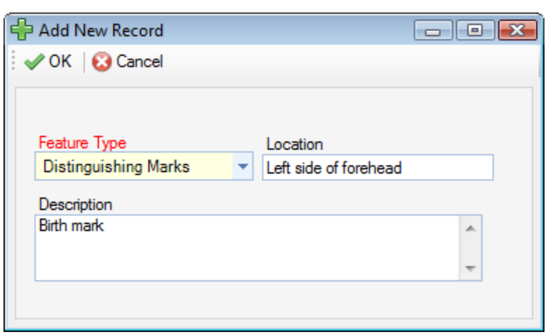
To import person's settings from the **Gateway**, perform the steps described in the "Items" section, the "Import record's settings from the Gateway" chapter.

Identify the person's unique features

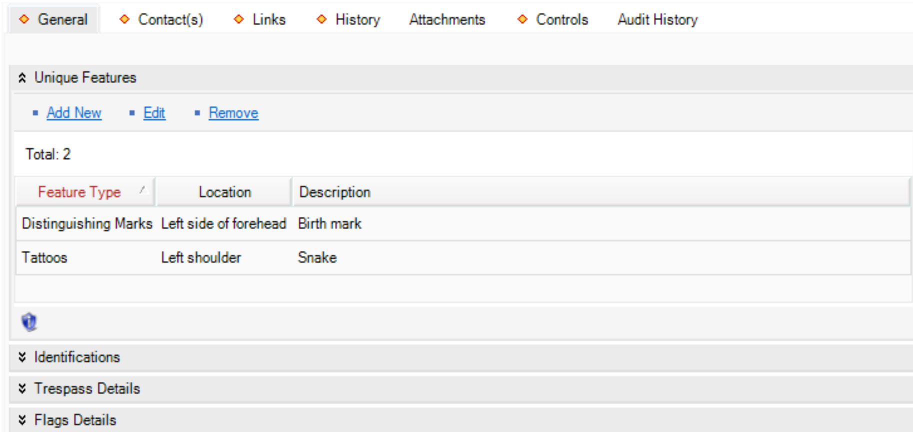
1. In the **Unique Features** section, click **Add New**. A pop-up window will open.

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, etc.).

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



4. Click **OK**.



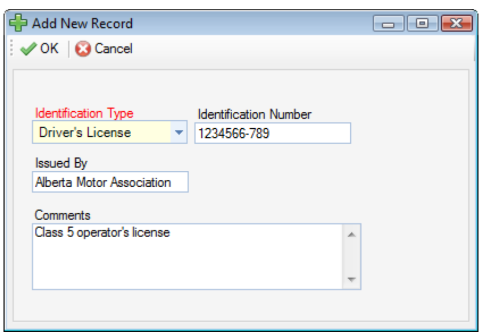
Record the person's pieces of ID

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

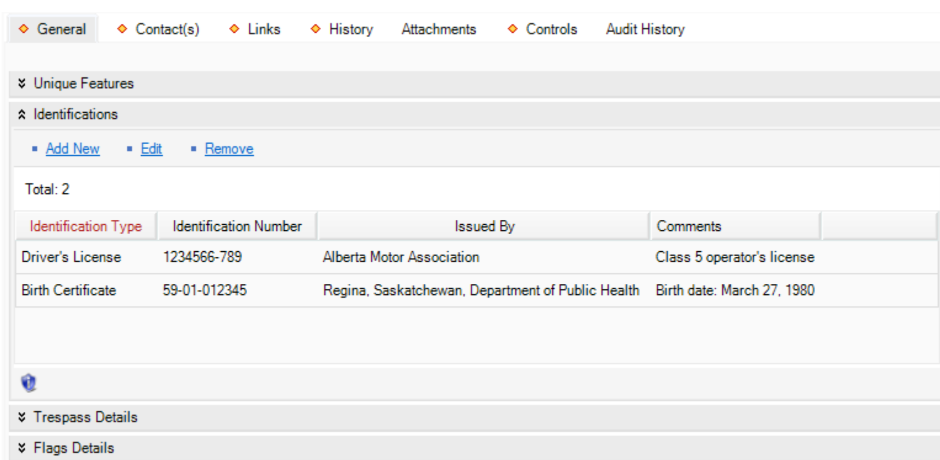
2. Specify the **Identification Type** (e.g., Driver's License, Birth Certificate, etc.) and the **Identification Number**.

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

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



5. Click **OK**.



Document the person's trespass details

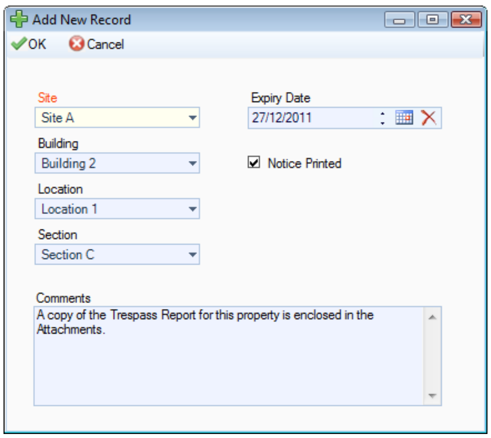
1. In the **Trespass Details** section, click **Add New** . A pop-up window will open.

2. Specify the **Site**, **Building**, **Location** and **Section** where the trespass occurred.

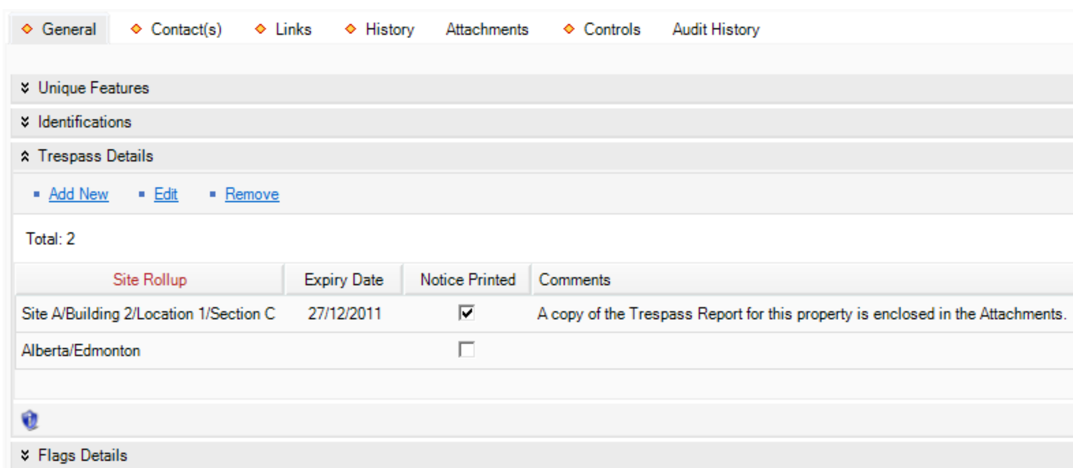
3. If a trespassing notice was created, check the **Notice Printed** box.

4. If there is an expiry date for the trespassing notice, or for the offence, enter this in the **Expiry Date** field.

5. Include any additional information about the trespass under **Comments**.



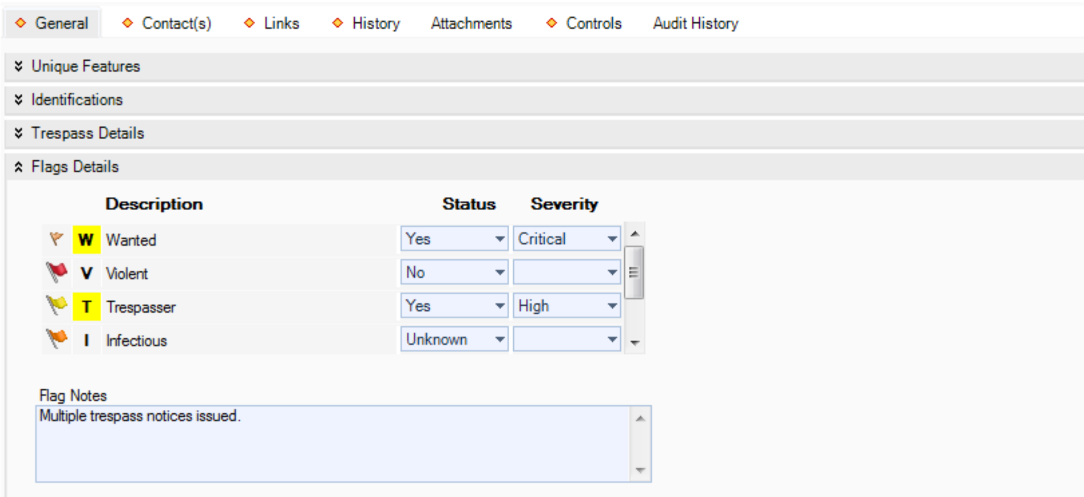
6. Click **OK**.



Flag the person

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

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



Record contact information

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

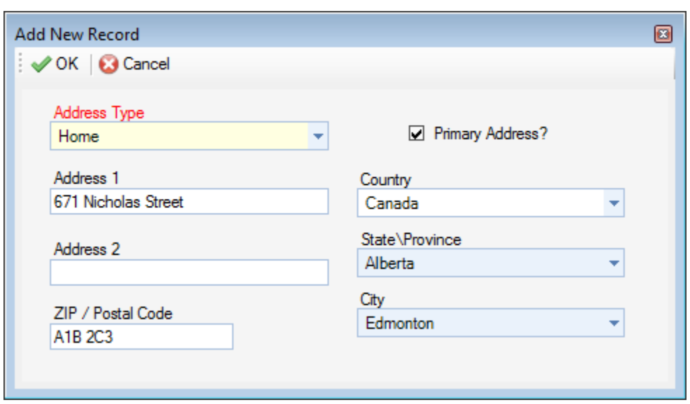
2. In the **Address** section, click **Add New**. A pop-up window will open.

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

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

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

    d. Click **OK**.



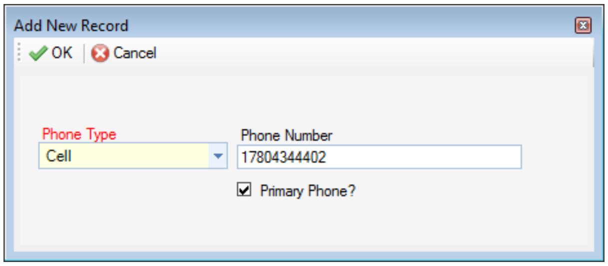
3. In the **Phone Numbers** section, click **Add New**. A pop-up window will open.

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

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

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

d. Click **OK.**



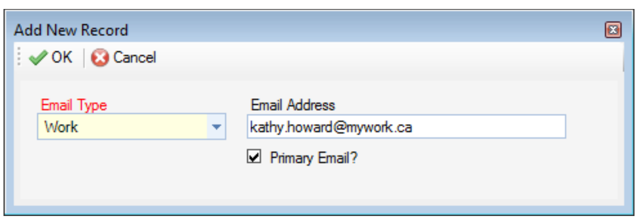
4. In the **Email Address** section, click **Add New**. A pop-up window will open.

a. Specify the **Email Type** (e.g., Home, Work, etc.).

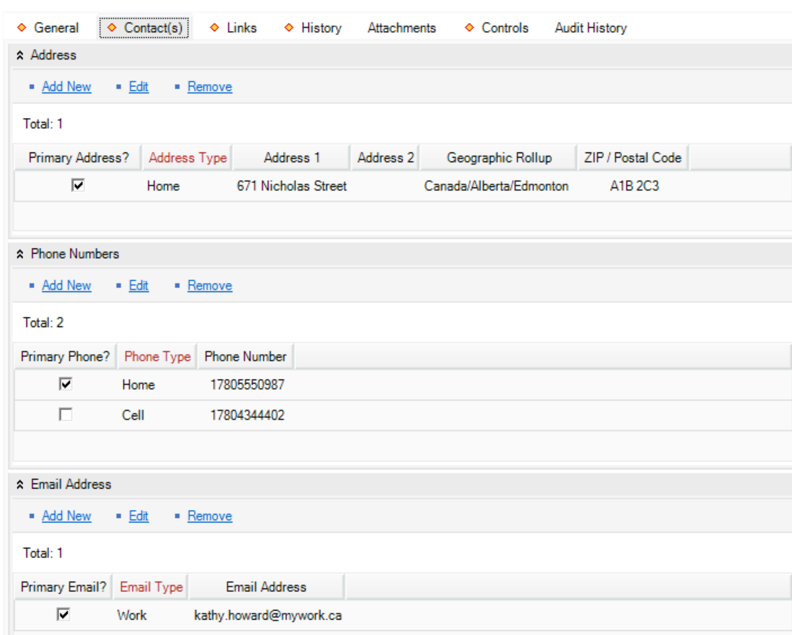
b. Enter the person's **Email Address**.

c. If the email address is the person's main email address, check the **Primary Email** box.

d. Click **OK**.



5. Add as many contact entries, as needed.



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.

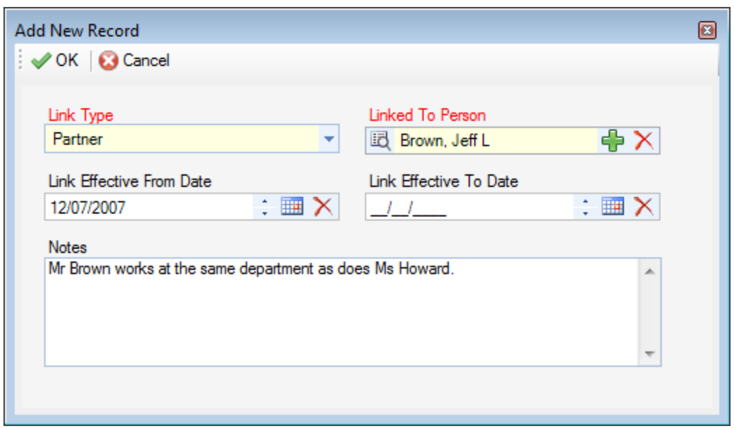
3. Indicate how the record is related to the person in the **Link Type** field (e.g., Partner, Employer, Driver, etc.).

4. Select the person you wish to link to the record from the **(Linked To) Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

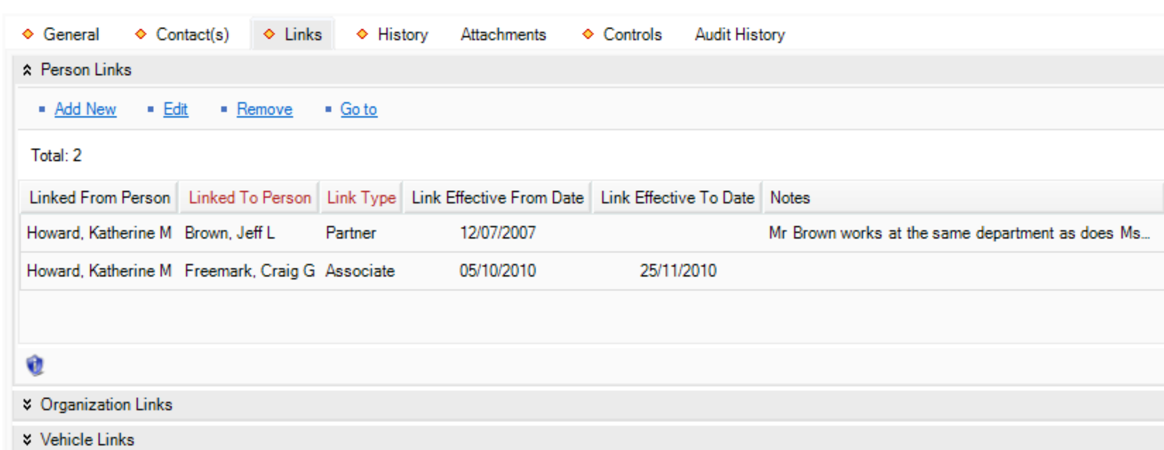
5. Enter the date that the person became associated with the record in the **Link Effective From Date** field. If this association no longer exists, indicate the date that it terminated in the **Link Effective To Date** field.

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

7. Click **OK**.



8. Once you click **Save** to save the changes made to the record, this link will automatically be cross-referenced in both the current record and linked Person record under the Links tab.



Link a record to an organization

1. Select the **Links** tab.

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

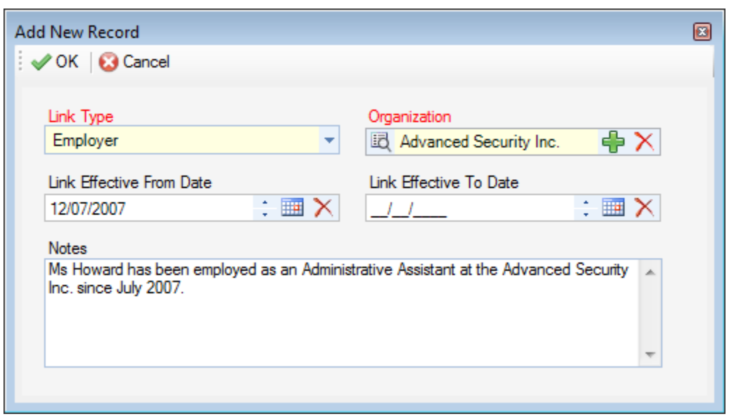
3. Specify how the record and the organization are related in the **Link Type** field (e.g., Employer, Parent Company, Owns/Owned By, etc.).

4. Select the organization you wish to link to the record from the **Organization** pick list. If an Organization record does not already exist, use the Quick Add function to create one.

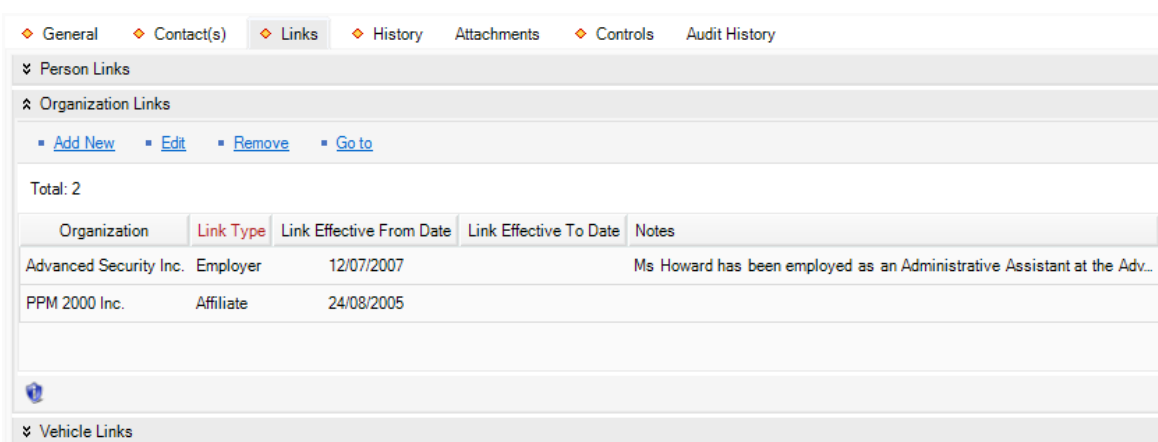
5. Enter the date that the record and the organization became associated with each other in the **Link Effective From Date** field. If this association no longer exists, indicate the date that it terminated in the **Link Effective To Date** field.

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

7. Click **OK**.

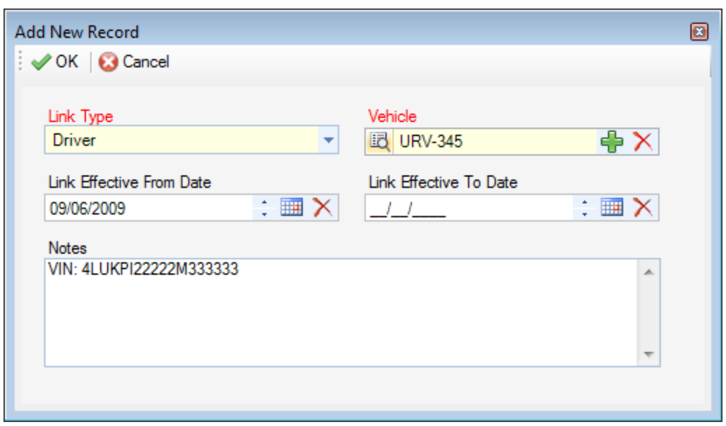


8. Once you click **Save** to save the changes made to the record, this link will automatically be cross-referenced in both the current record and the linked Organization record under the Links tab.

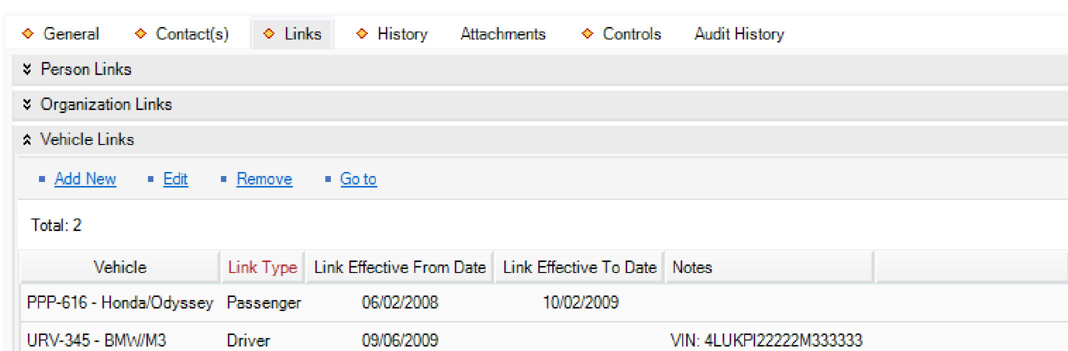


Link a record to a vehicle

1. Select the **Links** tab.
2. In the **Vehicle Links** section, click **Add New**. A pop-up window will open.
3. Specify how the record and the vehicle are related in the **Link Type** field (e.g., Registered Owner, Owns/Owned By, Same Fleet, etc.).
4. Select the vehicle you wish to link to the record from the **Vehicle** pick list. If a Vehicle record does not already exist, use the Quick Add function to create one.
5. Enter the date that the record and the vehicle became associated with each other in the **Link Effective From Date** field. If this association no longer exists, indicate the date that it terminated in the **Link Effective To Date** field.
6. Type any additional information about the link in the **Notes** text box.
7. Click **OK**.



8. Once you click **Save** to save the changes made to the record, this link will automatically be cross-referenced in both the current record and linked Vehicle record under the Links tab.



View person's incident involvements

Access the **History** tab and complete the operation, as described in the "Items" section, the "View record's incident involvements" chapter.

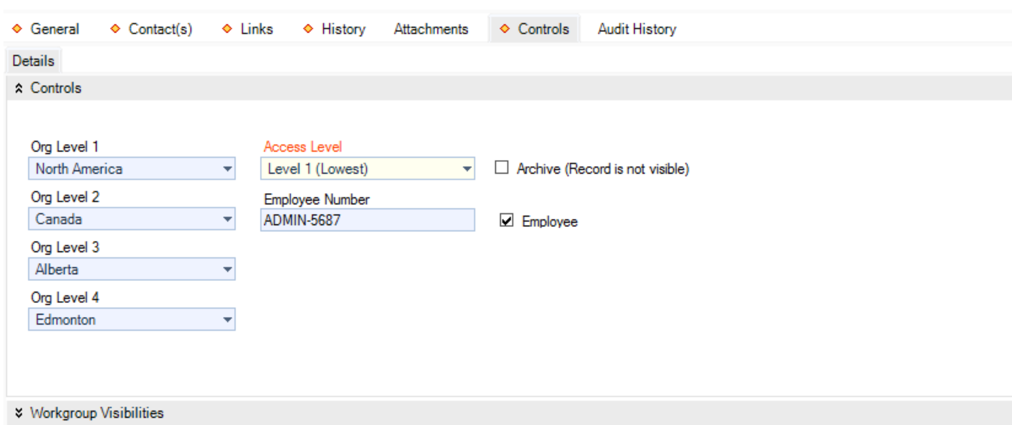
Attach a file to a Person record

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 wish to archive the record making it unavailable for users to access, check the **Archive (Record is not visible)** box.
5. Check the **Employee** box, if the person is employed by your organization, and then enter the person's **Employee Number**.



Define which workgroups can access the Person record

In the **Workgroup Visibilities** section, define access options for the record, as described in the "Incidents" section, the "Define which workgroups can access the record" chapter.

Track changes made to a Person record

Open the **Audit History** tab and complete the operation, as described in the "Incidents" section, the "Track changes made to a record" chapter.

Organizations

Create a new Organization record

Perspective provides two ways to create a new Organization record: with the help of the standard Add function, and by importing an Organization record from the Gateway.

To create an Organization record using the standard Add function:

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

2. Enter the **Organization Name**.

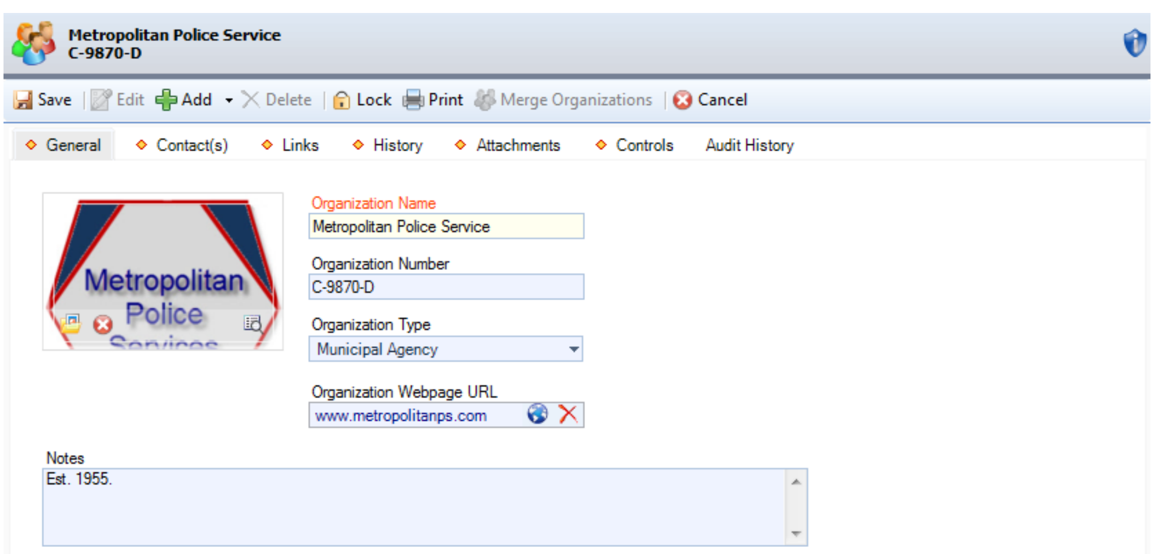
3. If known, input the organization's file, ID or other tracking number in the **Organization Number** field.

4. Choose the appropriate description from the **Organization Type** lookup list.

5. If the organization has a Web site, specify the Web address under **Organization Webpage URL**. Clicking the adjacent Microsoft Internet Explorer® icon will open the Web page in a separate browser window.

6. Enter any additional information about the organization in the **Notes** box.

7. To add an **image** to the Organization record, click the **Add** icon in the image box. Locate the image file in the browser window and click Open.



To import organization's settings from the Gateway, perform the steps described in the "Items" section, the "Import record's settings from the Gateway" chapter.

Record an organization's contact information

Open the **Contact(s)** tab and complete the operation, as described in the "Persons" section, the "Record contact information" chapter.

Link an organization to a person

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a record to a person" chapter.

Link an organization to another organization

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a record to an organization" chapter.

Link an organization to a vehicle

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a record to a vehicle" chapter.

View organization's incident involvements

Access the **History** tab and complete the operation, as described in the "Items" section, the "View record's incident involvements" chapter.

Attach a file to an Organization record

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

Control an Organization record's processing options

For control options available for Organization records, refer to the "Items" section, the "Control record's processing options" chapter.

Track changes made to an Organization record

Open the **Audit History** tab and complete the operation, as described in the "Incidents" section, the "Track changes made to a record" chapter.

Vehicles

Create a new Vehicle record

Perspective provides two ways to create a new Vehicle record: with the help of the standard Add function, and by importing a Vehicle record from the Gateway.

To create a Vehicle record using the standard Add function:

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

2. Enter the **License Plate** number. To avoid duplicate entries and to facilitate accurate searches, it is best to use a consistent format for entering license plate numbers (e.g., no spaces or special characters).

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

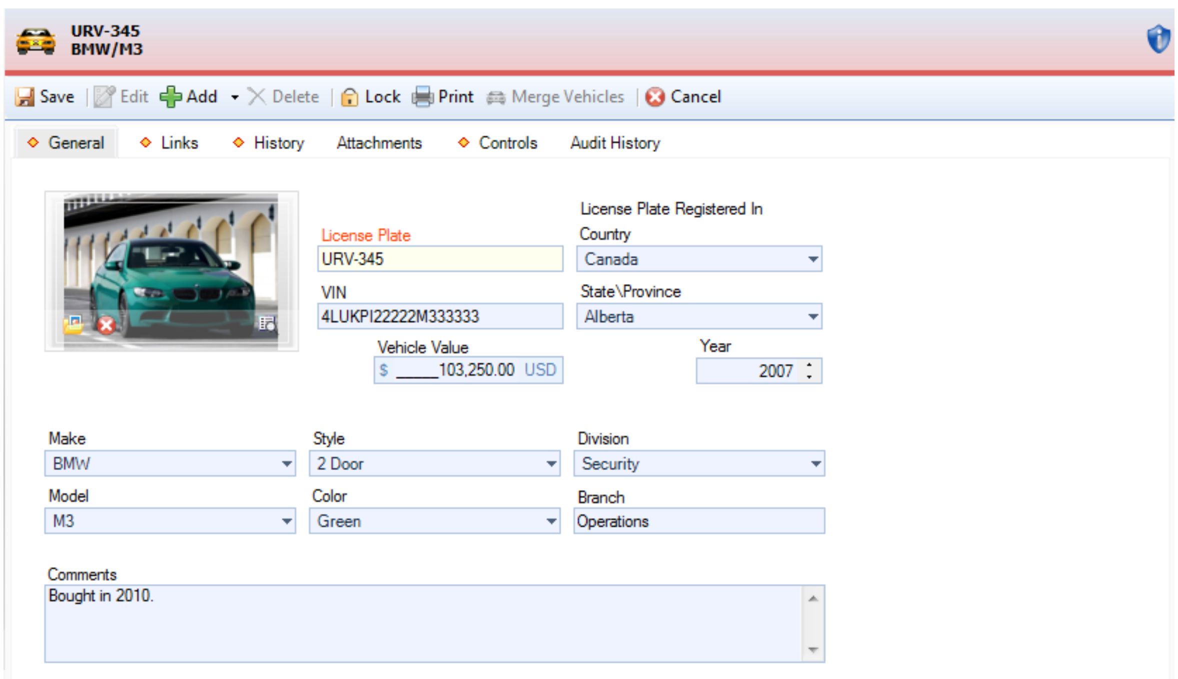
4. If known, enter the vehicle's **VIN**, **Vehicle Value** and **Year**.

5. Specify the vehicle's **Make**, **Model**, **Style** and **Color**.

6. If the vehicle is a company vehicle, specify the **Division** and **Branch** it belongs to.

7. Add any additional information in the **Comments** text box.

8. To add a **photo** of the vehicle to the record, click the **Add** icon in the image box. Locate the image file in the browser window and click Open.



To add a vehicle imported through the Gateway, perform the steps described in the "Items" section, the "Import record's settings from the Gateway" chapter.

Link a vehicle to a person

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a record to a person" chapter.

Link a vehicle to an organization

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a record to an organization" chapter.

Link a vehicle to another vehicle

Select the **Link** tab and complete the operation, as described in the "Persons" section, the "Link a record to a vehicle" chapter.

View vehicle's incident involvements

Access the **History** tab and complete the operation, as described in the "Items" section, the "View record's incident involvements" chapter.

Attach a file to a Vehicle record

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

Control a Vehicle record's processing options

Set the security controls and status of the Vehicle record

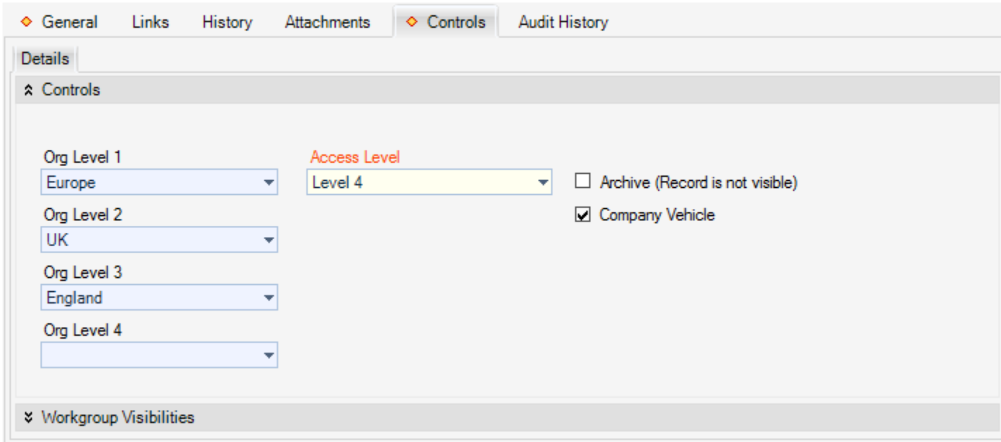
1. Select the **Controls** tab; the **Details** sub-tab will open by default.

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

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

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

5. Check the **Company Vehicle** box if the vehicle belongs to your organization.



Define which workgroups can access the Vehicle record

In the **Workgroup Visibilities** section, define access options for the record, as described in the "Incidents" section, the "Define which workgroups can access the record" chapter.

Track changes made to a Vehicle record

Open the **Audit History** tab and complete the operation, as described in the "Incidents" section, the "Track changes made to a record" chapter.

Merge Records

The **Merge** function is only available on four Perspective's data forms, i.e. Items, Persons, Organizations and Vehicles. It is a method of merging partially duplicate records that correspond to a single physical referent (e.g., an item, a person, an organization, or a vehicle). The function is represented by the **Merge** button on the Viewing pane toolbar.

Note: The Merge function is irreversible and cannot be undone. Be absolutely certain you want to merge records before proceeding!

1. Open a record that will function as the **primary record** of your merging process, typically, the one with the most accurate information and the most details.

2. Click the **Merge** button on the Viewing pane. A Quick Merge form will open with the general details of the selected record on the left, and an equivalent blank record form on the right.

3. Select the appropriate **Secondary Record** with which you would like to merge the primary record from the pick list at the top of the blank form.

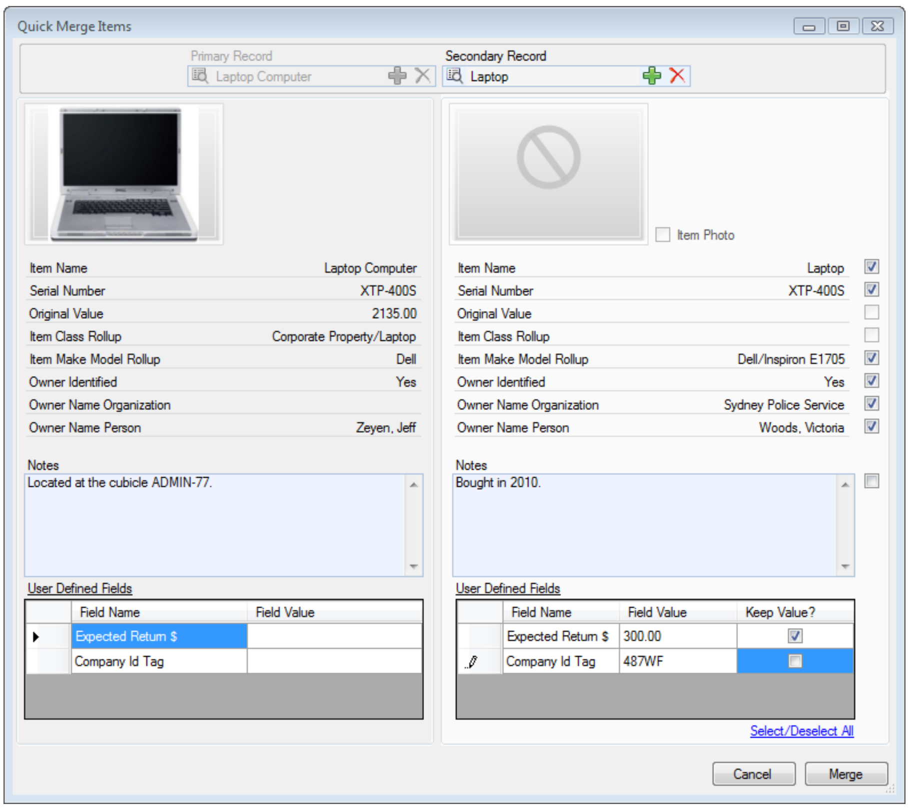
   The blank form will populate with the data contained in the General tab of the selected record. The checkmarks will mark the pieces of information that can be merged between the records. For the fields, where the secondary record contains no information, the checkmarks will be inactive. This means that the corresponding values in the primary record will remain unchanged.

4. Select (or deselect) the fields in the second form you wish 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 that **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, etc.)

5. Click **Merge**.



6. Once the merging of the selected records is complete, a confirmation dialog will be displayed. Click **OK**. The secondary record will disappear from the Listing pane, while the resulting merged record will display in the Viewing pane in editing mode.

The result of the merge will be a single record that contains the following components:

a. The values from the primary record data (including the image of the record's reference item, person, organization or vehicle, and the user defined fields) that were not selected for merging on the secondary record form;

b. The values of the secondary record data (including the image of the record's reference item, person, organization or vehicle, and the user defined fields) that were selected for merging on the secondary record form;

c. The *hidden* data entries pulled from *both* the primary and the secondary record that correspond to all or some of the following data types:

   The records' **Contacts**: Addresses, Phone Numbers, Email Addresses;

   The records' **Links**: Person, Organization and Vehicle Links;

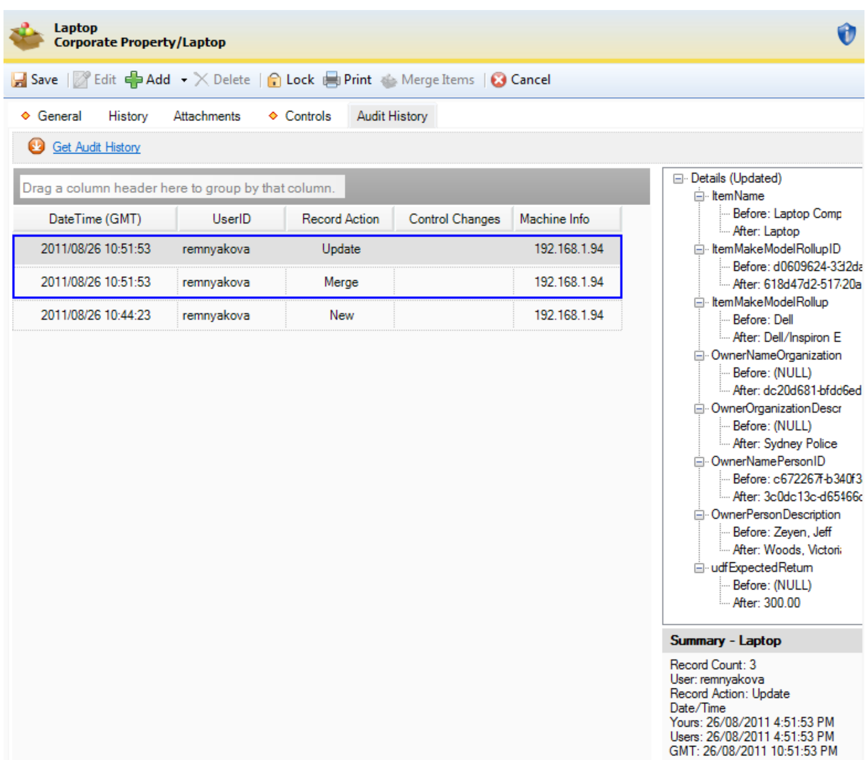
   The records' **Histories** of all incident involvements;

   The records' **Attachments**;

   If you were merging two Person records, the data will also be pulled from the **Unique Features**, **Identifications** and **Trespass Details** sections from both records.

The data that *never* gets merged (i.e., that is left unchanged, with the primary record's values) includes the settings of the **Controls** tab. If you were merging two Person records, the **Flags Details** contained in the primary record will be saved as the default settings for the resulting merged record, too.

Under the **Audit History** tab, the occurred merge is documented with the help of two Record Action entries: the Merge entry stands for the occurred merging of the records' general and hidden data, whereas the Update entry documents the merging of the specific fields in the primary and the secondary record forms.



7. Scan the final record for possible repetitions of data that were merged and resulted in unintentional duplication of the same information.

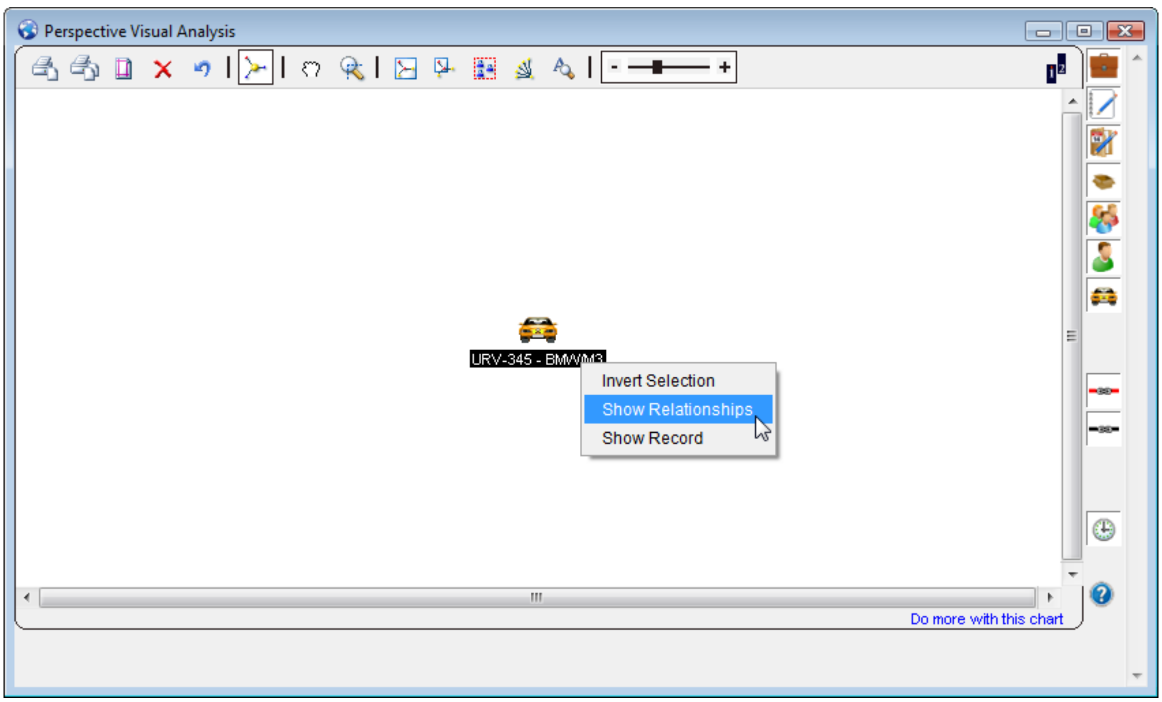
8. Click **Save** to save the changes made.

Construct a Visual Link Chart for a Record

The function to perform visual analysis of links that exist between various types of records in Data Forms is only available to organizations that have purchased Perspective Visual Analysis, an optional module for the Premium Edition of Perspective. If your system includes Perspective Visual Analysis, you can create a visual link chart representing the data relationships between the selected types of records.

To activate this function, select the main record of focus (e.g., a Person record) in the Viewing pane and click the **Visual Analysis** icon on the Ribbon. A separate Perspective Visual Analysis window will open with the selected record displayed as an icon in the centre.

See the *Perspective Visual Analysis* section for further information on building a link chart.



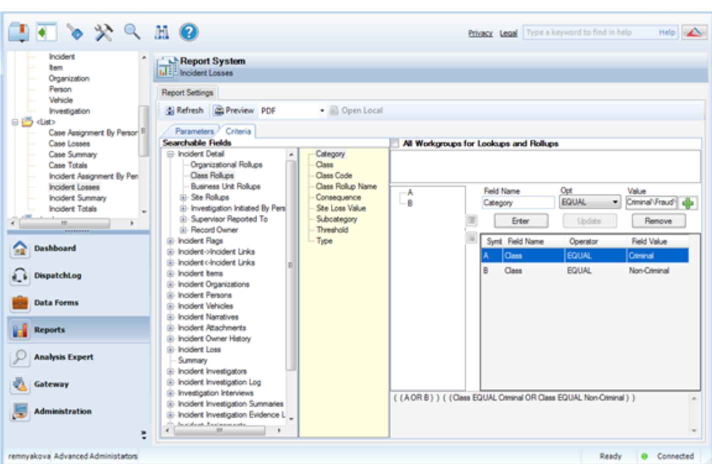
Reports

Perspective contains a number of pre-set 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 pre-set reports from five general categories. Once selected, the name of the report will appear at the top of the Report System pane.
   - ***Administrator Only:*** Reports that list groups of administrative hierarchies available in Perspective (e.g., Roles, Users, etc.).
   - ***Detail Reports:*** Condensed summaries of individual records stored in Perspective.
   - ***List:*** Reports that contain lists of records, assignments and losses.
   - ***Lookups:*** Reports that list values available in various Perspective's lookups.
   - ***Summary Reports:*** Reports with a summary of data analysis; results are summarized in assorted bar and pie charts.
2. **Report System pane:** Assists in filtering data for future reports and executes their creation.
3. **Report Settings toolbar:** The invariable part of the Report System pane that provides options for refreshing the report settings view, generating reports in PDF and opening previously run reports locally.
4. **Report Settings pane:** The variable part of the Report System pane that displays tabs, panes and tools for specifying parameters for the data used in your report.



Types of Reports

Administrator Only

- ***Role List***: Lists all system roles, along with their respective descriptions and organizational rollups.
- ***Test Report***: For testing purposes only; successfully running this report demonstrates that SQL Reporting Services is operating properly.
- ***User List***: Lists all system users, along with their assigned security controls (roles, workgroups, organizational rollups and access levels), and groups them by a security control of your choice.
- ***Workgroup List***: Lists all workgroups, along with their respective descriptions, organizations and Perspective e-Reporting access status.

Detail Reports

- ***Incident Executive Summary***: Displays the selected Incident record in brief detail, providing a short summary of the incident, its investigation and outcome, which is intended for managerial review.
- ***Activity Landscape***: Displays the selected Activity record in great detail in a landscape-format report.
- ***Activity Portrait***: Displays the selected Activity record in great detail in a portrait-format report.
- ***Case***: Displays the selected Case record.
- ***Incident Condensed Landscape***: Displays the selected Incident record in great detail in a landscape-format report.
- ***Incident Condensed Portrait***: Displays the selected Incident record in great detail in a portrait-format report.
- ***Incident***: Displays the selected Incident record, including some of its investigation data.
- ***Item***: Displays the selected Item record.
- ***Organization***: Displays the selected Organization record.
- ***Person***: Displays the selected Person record.
- ***Vehicle***: Displays the selected Vehicle record.
- ***Investigation***: Displays investigation data from the selected Incident record.

List

- ***Case Assignment By Person***: Lists all case-related assignments along with key assignment details, such as the particular case in which the assignment was created, the user who created the assignment and the user who was given the assignment.
- ***Case Losses***: Groups and totals case loss values by category, manager, supervisor, status or workgroup; results are displayed in list form and are summarized in a bar chart.
- ***Case Summary***: Groups and totals cases by category, manager, supervisor, status or workgroup; results are displayed as brief case summaries.
- ***Case Totals***: Groups and totals cases by category, manager, supervisor, status or workgroup; results are displayed in list form and are summarized in a bar chart.

Note: The above four Case reports are only available in the Premium Edition 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.

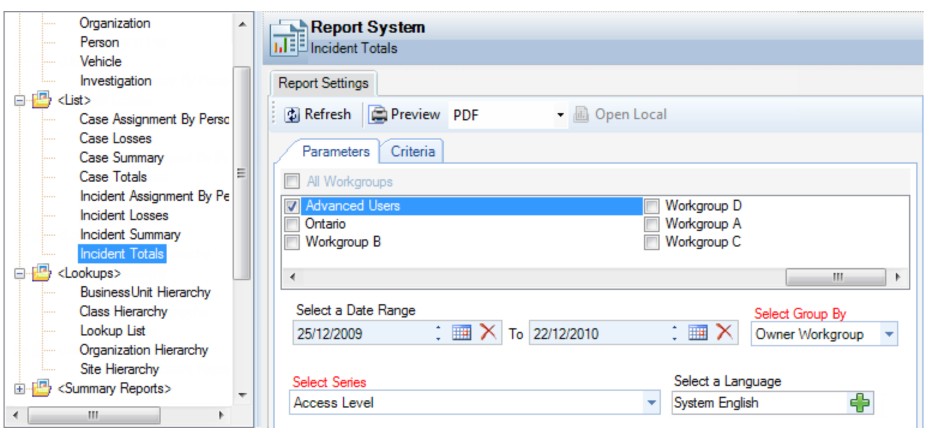
Summary Reports

- ***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, etc.).
    - ***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 Premium 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, etc.).
- ***Select Series*** *(only for Totals reports):* Specify the entity that your report's charts will be grouped or organized by, next to the selected Group By field (i.e., Status, Disposition, Access Level or Workgroups).
- ***Select Net Loss Over/Under*** *(only for the Yearly / Quarterly / Monthly Report):* Specify the Net Loss threshold value by which you would like to organize your report.
- ***Completed?*** *(only for Assignment reports)*: Indicate whether you would like completed, incomplete, or both completed and incomplete assignments to be included in your report.
- ***Include Locked?*** *(only for the Role List report):* Indicate whether or not you would like locked roles to be included in your report.

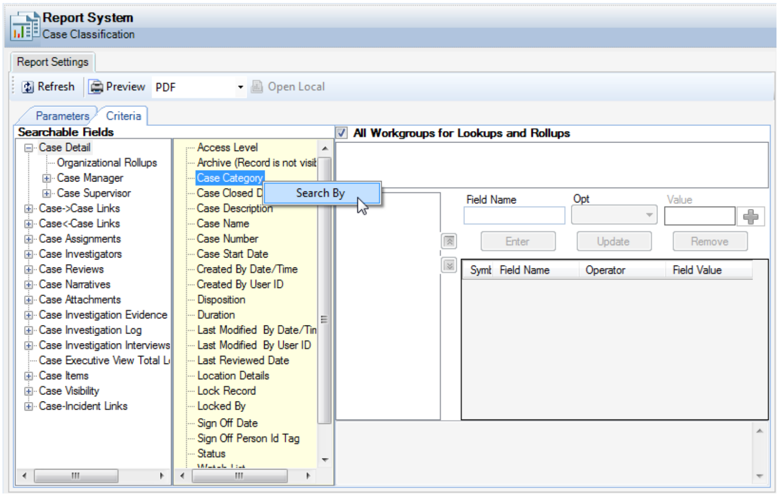


3. In addition to the Parameters tab, some **Summary Reports** have an option of filtering data that you would like to include in your report. To further qualify your report results, select the **Criteria** tab.

    a. Check the **All Workgroups for Lookups and Rollups** box to search across lookup lists and rollup values for all workgroups.

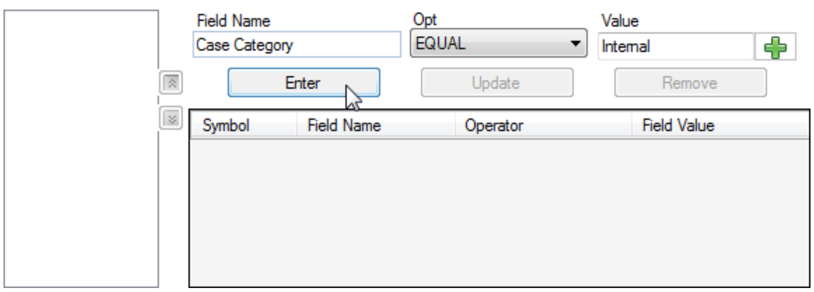
    b. In the **Searchable Fields** pane, select a form entity to display its available fields in the yellow pane to the right.

c. Highlight and right-click a field you would like to specify settings for, and select **Search By** to add the field to your search criteria. The chosen field will automatically populate the **Field Name** box in the search pane on the right half of the screen.



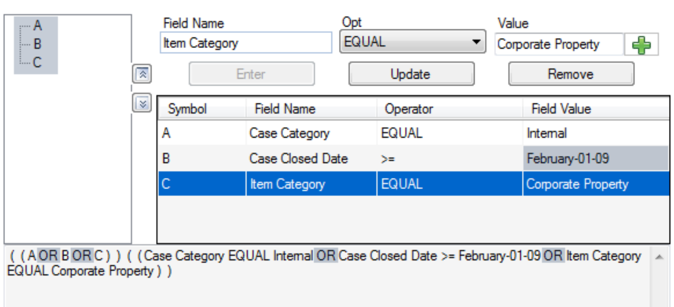
d. Select a field operator from the **Opt** lookup list (e.g., =, >, etc.).

e. Enter the comparative value in the **Value** field or select an option from the list by clicking on the plus icon .

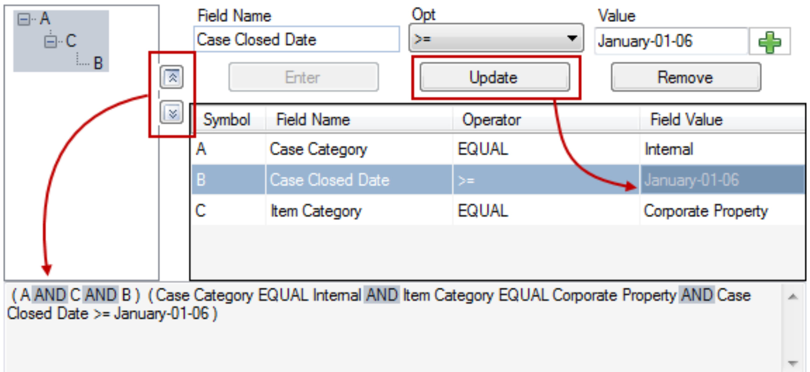


f. Click **Enter** to add the field specification to your report search criteria.

Every time you add a new field specification to the search criteria, the pane on the left will populate with **a new symbol** associated with the added criterion (e.g., A, B, C, etc.). The arrangement of the symbols in the pane defines the relationships between the criteria, which are also reflected in the **Boolean logic statement** outlined below. By default, every criterion added is in the **OR** relationship with the previous and next.



g. To **modify these relationships** (and the logic statement) creating an internal hierarchy within the criteria, select a symbol from the pane on the left and click the adjacent up or down arrows. Criteria that appear in separate nodes are in the OR relationship to each other, while criteria that appear in sub-nodes are in the AND relationship to the main criterion at the top of the node.

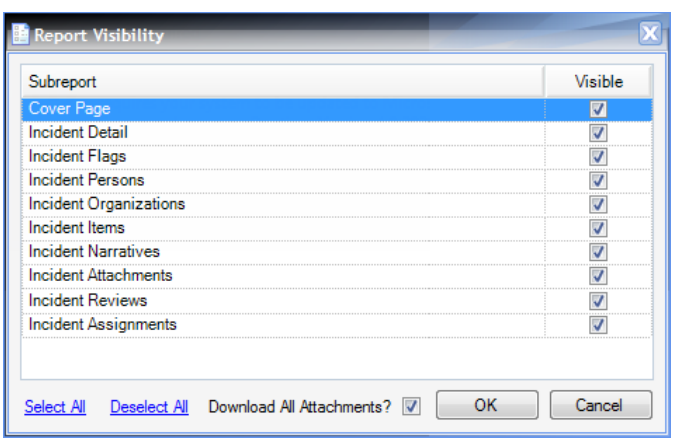


h. To **modify your search criteria**, select the criteria you want to modify, make changes in the Opt and Value fields and click **Update**. The changes will be applied to the criterion on both the level of the criteria list and the Boolean logic statement.

i. To **remove a field** from your search criteria list, select the field and click **Remove**.

4. Click **Preview** in the Report Settings toolbar to generate the report.

5. For some reports, you will have to select parts of the report that you wish 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 wish to appear in your report. Check the "Download All Attachments?" box if you wish to download the attachments included in the record for printing. Click **OK**.



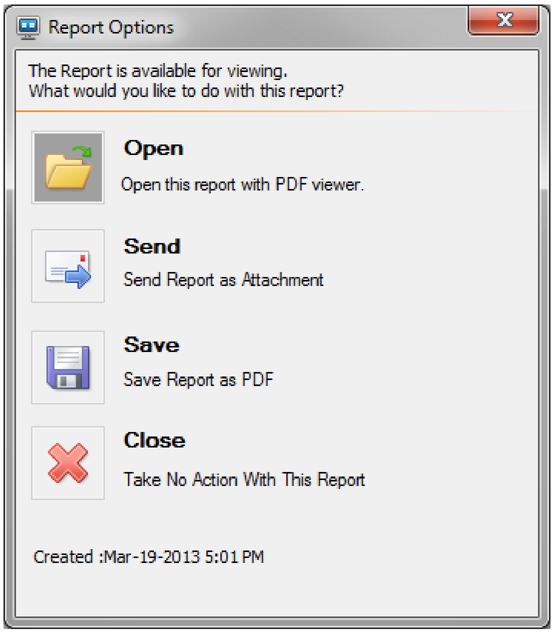
6. A **Report Options** window will open.

   a. Click the **Open** icon to instantly view a printable PDF copy of the report.

   b. Click the **Send** icon to send an email message with a PDF copy of the report attached.

   c. Click the **Save** icon to save a PDF copy of the report to the location of your choice.

   d. Click the **Close** icon to cancel the report.



7. To **access the most recently generated report**, click the **Open Local** button  in the Report Settings toolbar.

   Note that the Preview button should always be used to generate new reports with the most up-to-date data available in Perspective. The Open Local button should only be used to quickly reference recently run reports.

Analysis Expert

Analysis Expert is an internal search engine that scans the data in all Activity, Incident, Case (Perspective Premium only), Item, Person, Organization and Vehicle records and returns results that meet the defined search requirements. Only users with access to Analysis Expert can view and use this component, and their search results reflect their 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 six sections:

1. **Ribbon:** Contains an additional set of buttons that perform saving, adding, cloning, deletion, sharing and execution of queries. Note that 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.

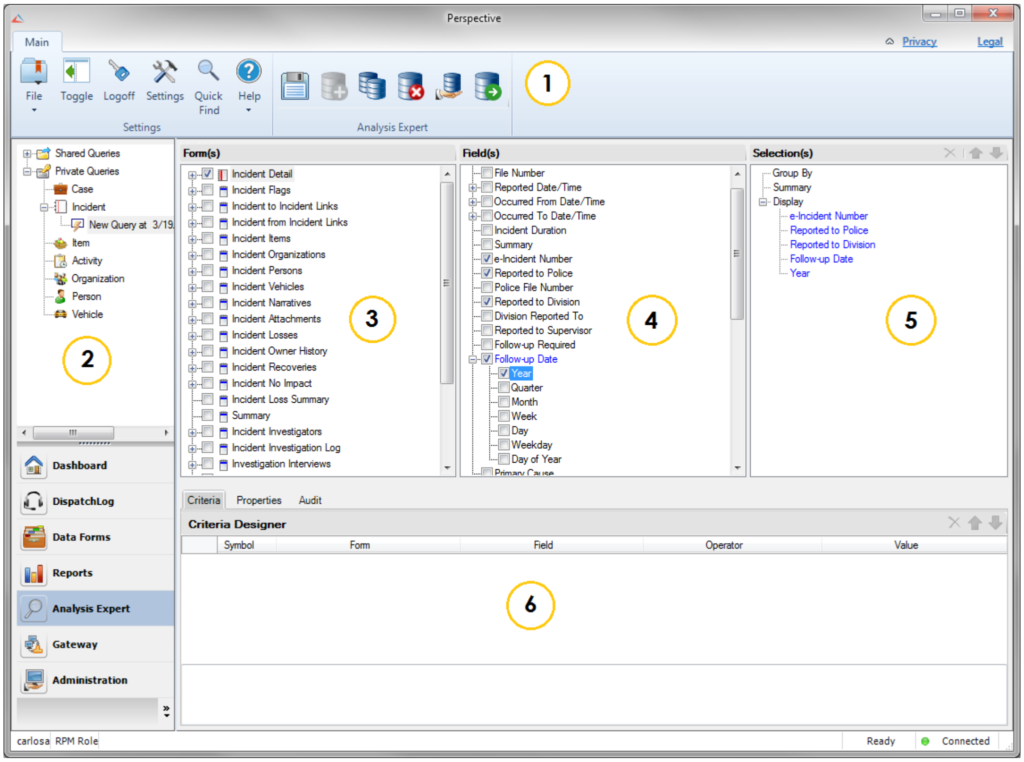
2. **Navigation pane:** Arranges queries that you create according to their access options (i.e., Shared Queries or Private Queries) and the various record entities (i.e., Case, Incident, Item, Activity, Organization, Person and Vehicle). By default, all new queries are Private Queries available only 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.

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.

6. **Criteria Designer:** Contains three tabs that control the process of query building. The Criteria tab displays the fields selected as search criteria from the Field(s) pane and enables setting 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.



Workflow 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 workflow 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:	Should be read as:	Explanation:
=	Equals	Will display records where the field's value is equal to the value specified. (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, dollar values, 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, such as dates, quantities, dollar values, etc.
>	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, such as dates, quantities, dollar values, etc.
<	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, such as dates, quantities, dollar values, etc.
<>	Is not equal to	Will display records where the field's value is not equal to the value specified.
Contains	Contains	Will display records where the value specified is contained somewhere in the selected field.
Begins With/Starts With	Begins with; Starts with	Will display records where the field's value begins with or starts with the value specified.
Ends With	Ends with	Will display records where the field's value ends with the value specified.
Combination of the Above		You may use any of Perspective's operators in combination to search for records matching multiple criteria.

Query Design Process

Create a query

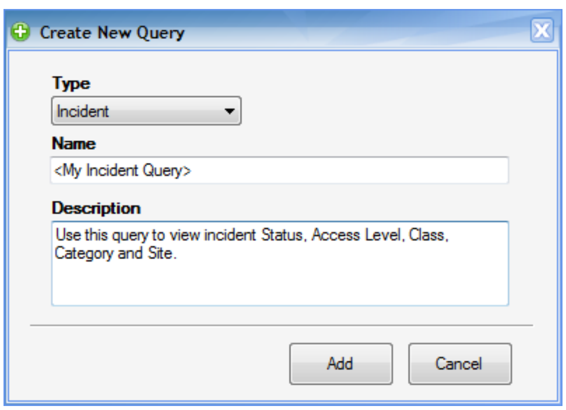
1. To start a new query, choose one of the three options:

    - Click **Add** on the Ribbon.
    - Right-click the **Private Queries** node in the Navigation pane and select **Add New Query**.
    - Expand Private Queries; right-click the record entity you wish to search in the Navigation pane (e.g., Case, Person, etc.) and select the appropriate **Add Query** option (e.g., Add Case Query, Add Person Query, etc.).

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, etc.).

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 or its purpose.



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.

Specify query criteria

Before specifying criteria for your query, take some time to think about the design of your query 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, etc.)?*

- *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, etc.)?*
- *How do you want to present your data? Do you want to summarize your results or see lists of actual data values?*

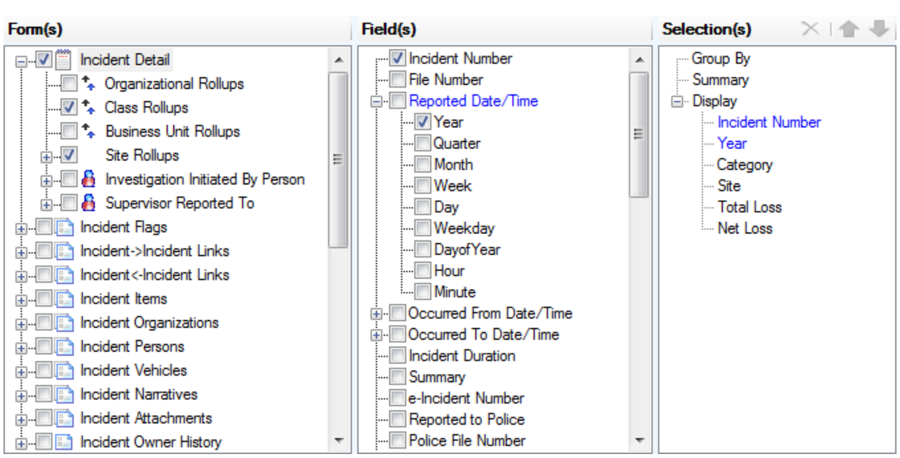
In the example below, we will be looking at a query design with the following specifications:

- ***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.***

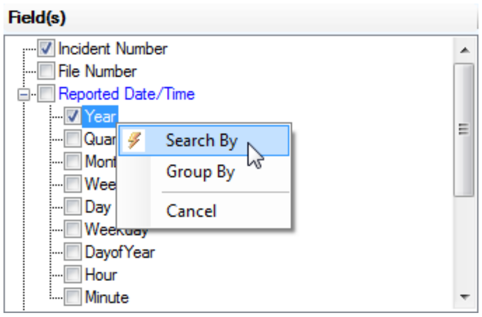
1. Expand the relevant form nodes in the **Form(s)** pane to see all constituent sub-forms.
2. To view fields available in a form in the Field(s) pane, click once on the name of the relevant form. To select all the fields in a particular form, check the form box.
3. In the **Field(s)** pane, check the boxes of the fields you wish 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 **re-order 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 re-arrange the field's position in the Display list.
- To **delete** a field from display in your query results, select the field name in the Selection(s) pane and click the **Remove** icon in the top right corner of the pane, or **uncheck** the field's checkbox in the Field(s) pane.

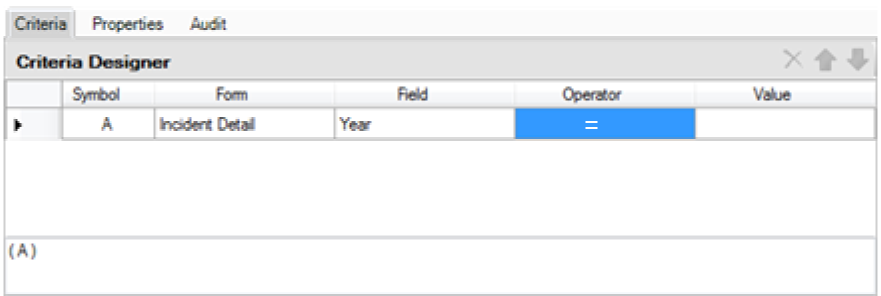


OPTION 1b: ***If you want to search a portion of data, set the parameters of your data sample.***

1. In the Field(s) pane, right-click a field that corresponds to the parameter of interest, and select the **Search By** option from the menu. If you do not want a parameter field to be displayed in the query results, unselect the checkbox beside the field's name in the Field(s) pane.

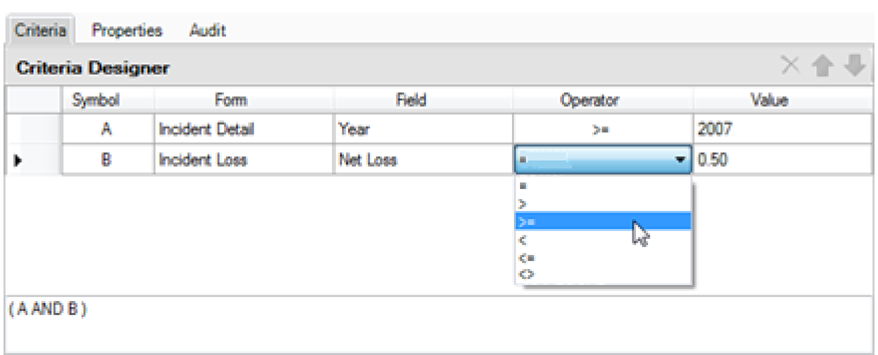


The selected field will now appear in the **Criteria Designer** pane below.



2. To **specify a comparison value** for the selected parameter, select the relevant **Operator** from the lookup list (e.g., =, <>, >, LIKE, CONTAINS, STARTS WITH, etc.). Depending on the type of parameter, you will have an option of either entering the comparison value in the **Value** field or selecting it from the lookup list.

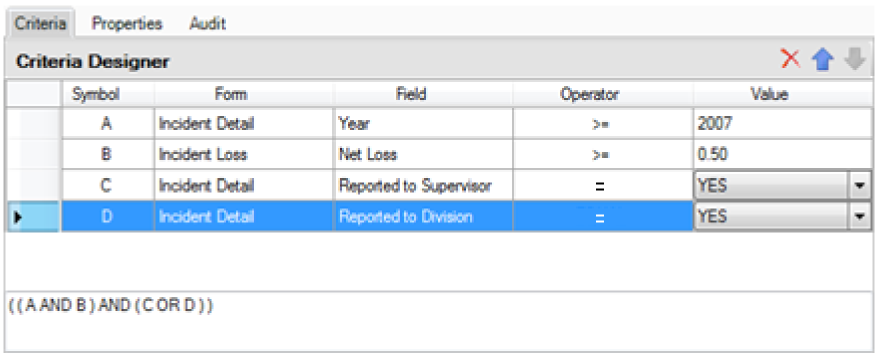
3. Add as many parameters for your data sample, as needed.



4. As you continue to specify the parameters, the system will edit the corresponding **Boolean logic statement** at the bottom of the Criteria Designer pane. By default, Perspective searches for data that meets both criterion A **AND** criterion B, and so on. If you wish 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.

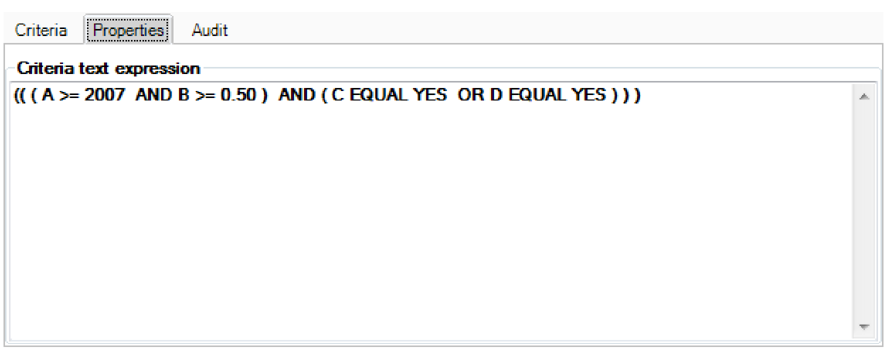
Note: Deleting a parameter symbol (e.g., A, B, C, etc.) from the statement will not remove the corresponding parameter from the list. This way, the Boolean logic statement contains the defining formula for your data sample, while the list above it provides parameters for free selection and serves as a reference point for the statement.



- To **re-order 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 re-arrange 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.

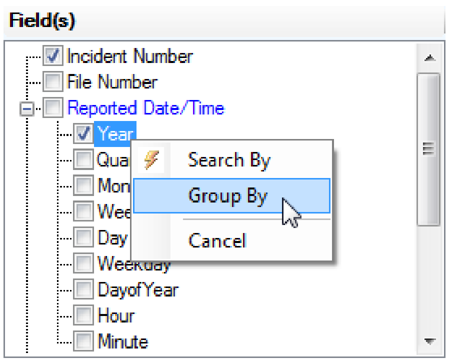


OPTION 2a: ***If you want to see lists of raw data values in your query results, proceed to execute your query.***

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).

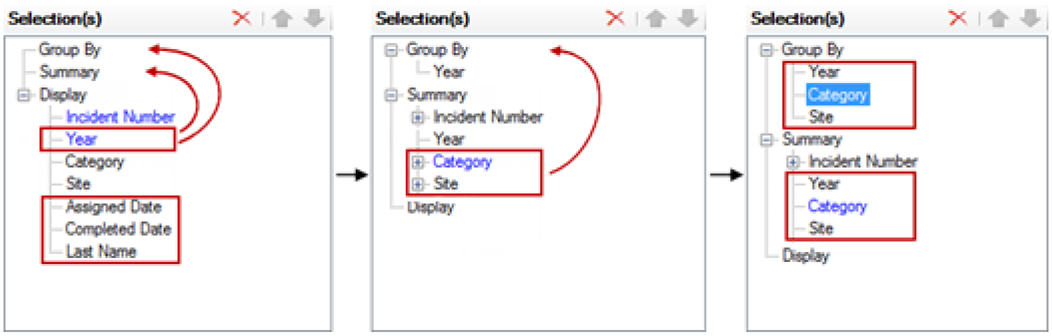
   The **Summary** function is activated when at least one Group By field is selected. This will reflect in the view of the Selection(s) pane: the selected field name will automatically populate the pane under *both* Group By and Summary, while the field names that were listed under Display, will all be 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, etc.), 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 wish 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, etc.). 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, etc.), 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

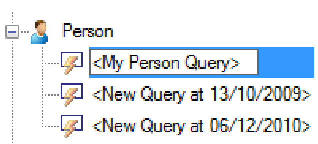
1. Complete the design of your query.

2. Store the query for access at a later date by clicking  **Save** on the Ribbon.

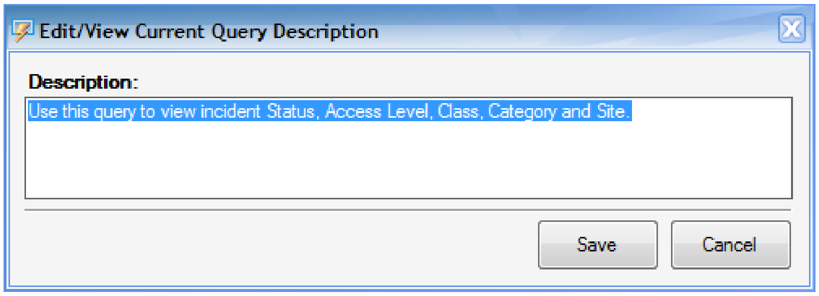
Edit a query

- 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**.

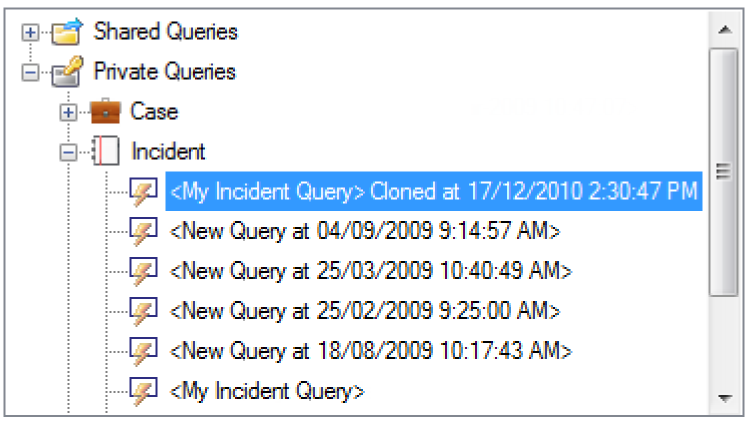


Clone a query

1. Select the name of the query you wish 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 wish 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 wish 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.

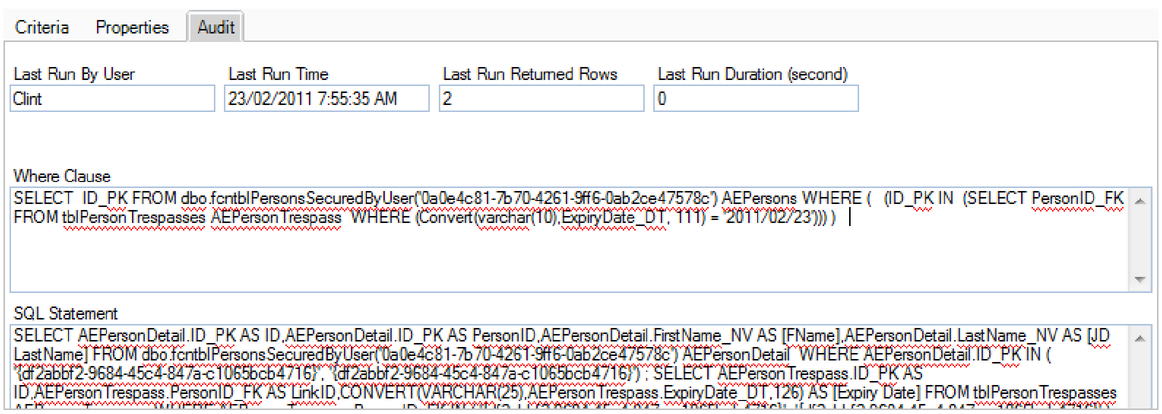
Execute a query

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 wish to run from the query list in the Navigation pane.

2. Click **Execute** on the Ribbon. A new window will pop up 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.

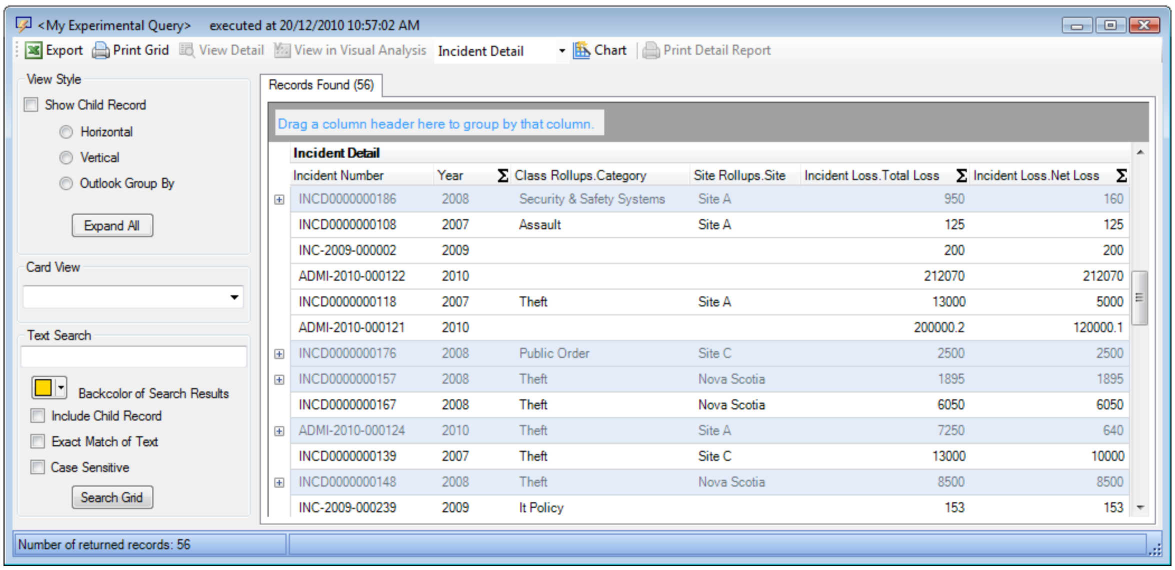


Working with Query Results

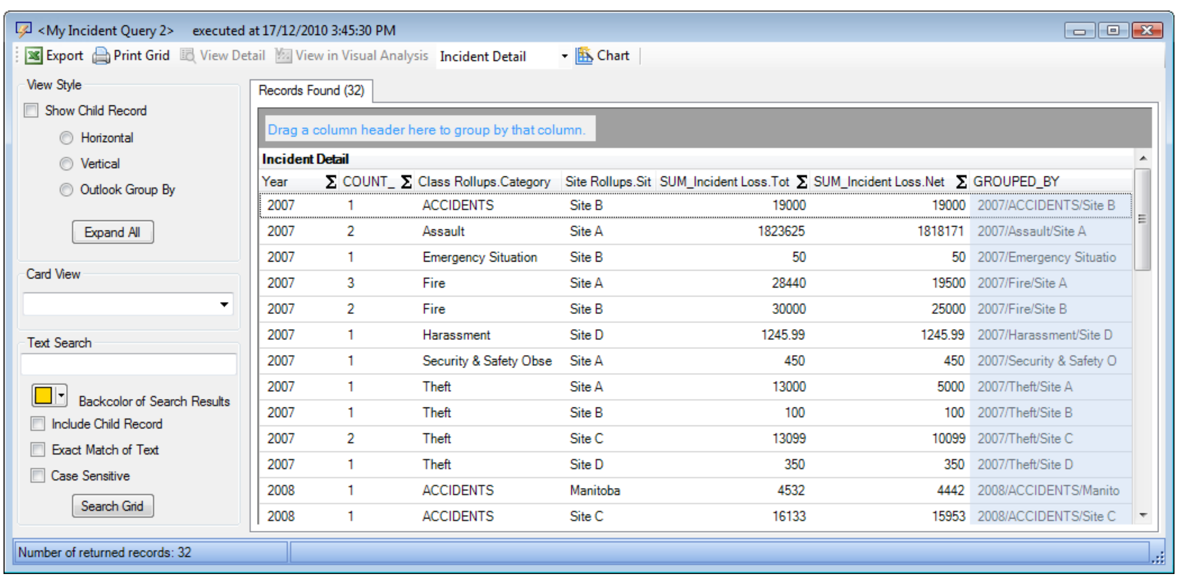
View query results

Once the query is “executed”, a new window will pop up 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.

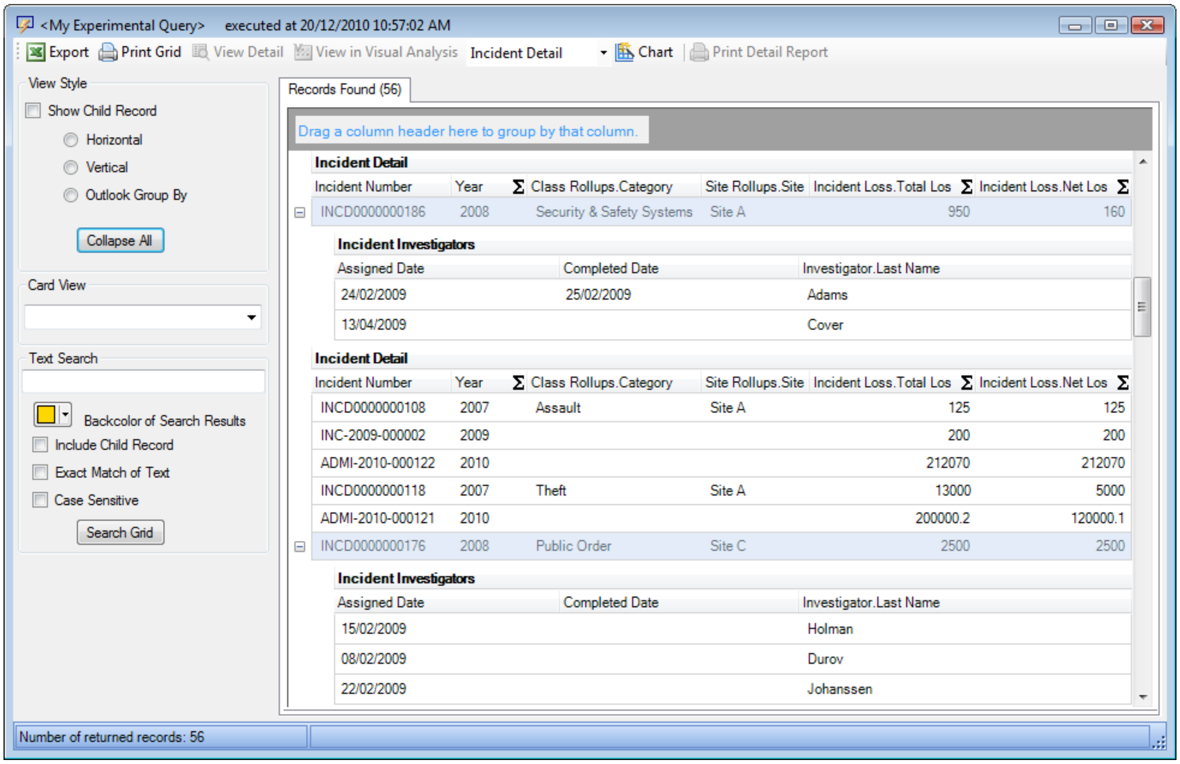
Depending on the type of the data fields (parent data with child data or without it) included in your query and whether you requested raw or grouped data during your query design, the grid will either **display the child record nodes**:



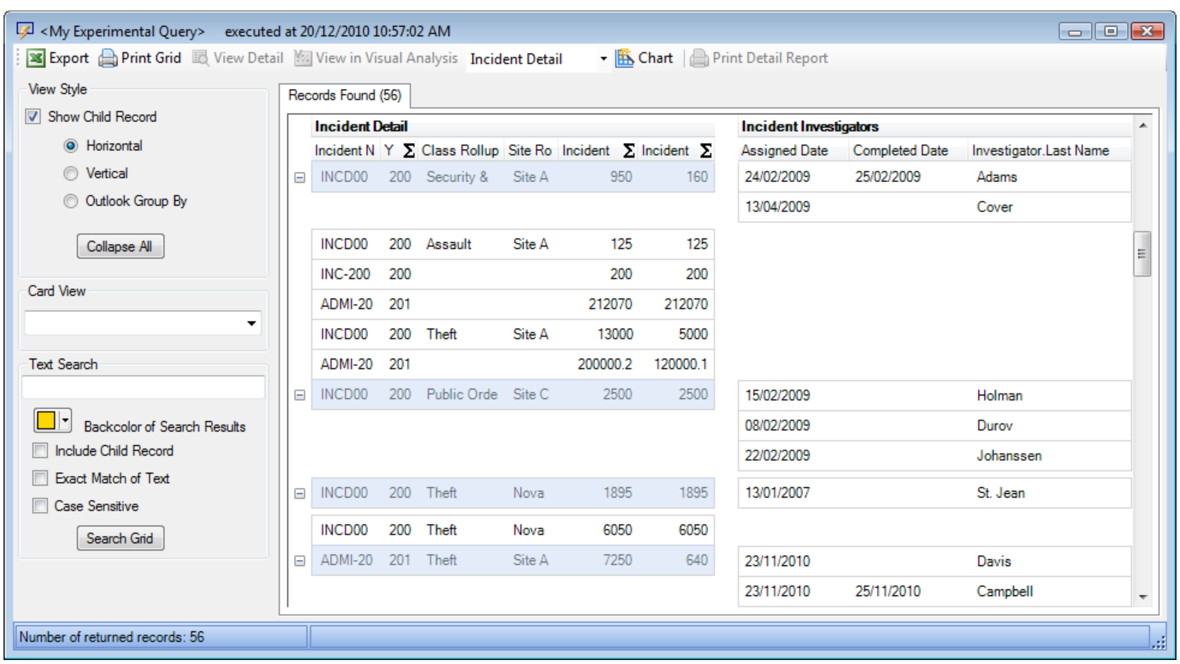
Or **not**:



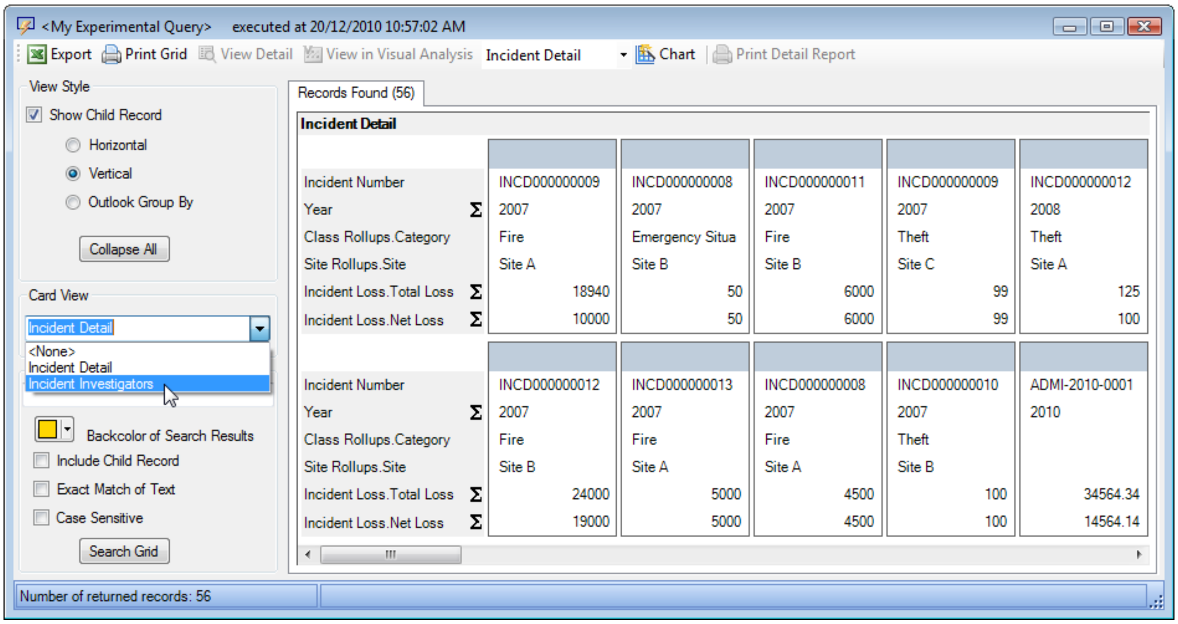
- If your query results contain child records, click **Expand All** to view all records contained under nodes. Once clicked, the name of this button will change to **Collapse All**. Click this to hide all child records again.



- By default, child records will be displayed below their respective parent records. To view child records to the right of parent records, check the **Show Child Record** box and select the **Horizontal** radio button. To restore the default view, select the **Vertical** radio button.



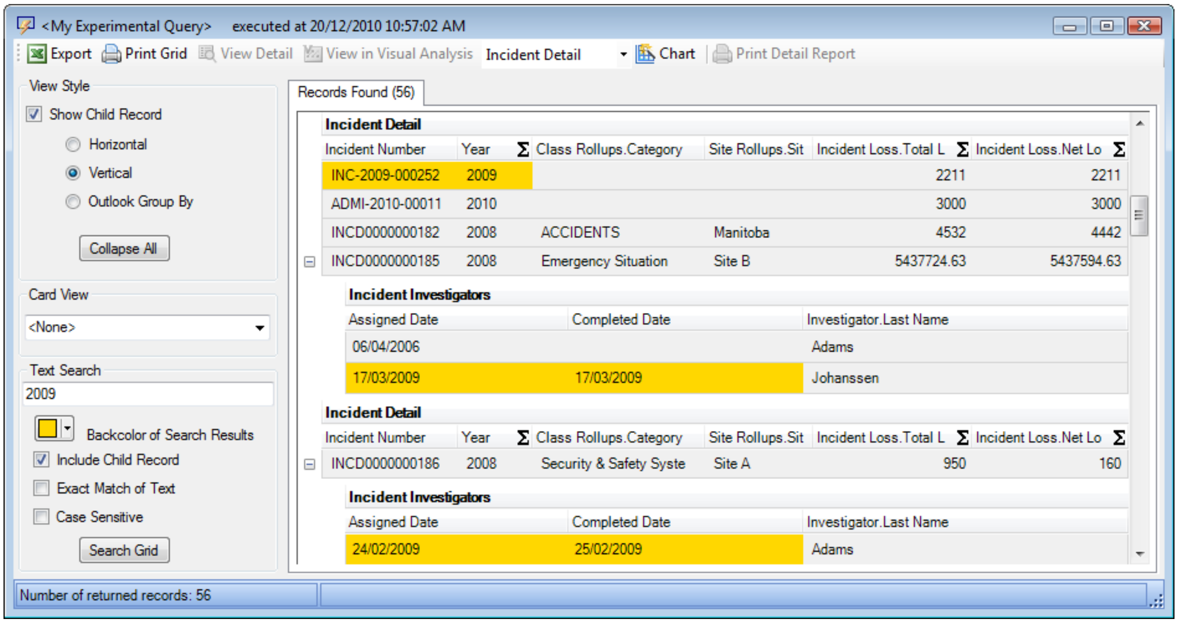
- Use the **Card View** option to invert the columns and rows in your query results for an alternative display option. If your query results contain child data, you may choose to display either parent records (e.g., Incident Detail) or child records (e.g., Incident Investigators) as cards by selecting the appropriate data label under the Card View lookup list. Select <None> to reset the view back to the list mode.



Search for specific data in query results

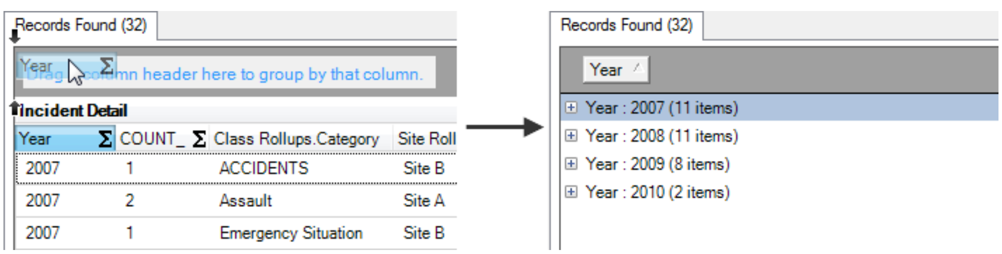
To search for specific data in your query results, use the **Text Search** function. Type a keyword in the Text Search field, and click **Search Grid**.

- The color of the highlighted search text can be modified using the **Backcolor of Search Results** lookup list.
- Check **Include Child Record** to search all records in the query results.
- Check **Exact Match of Text** to search only for text that corresponds exactly to the text entered in the Text Search field.
- Check **Case Sensitive** to only search for text containing the correct uppercase or lowercase characters specified in the search text.



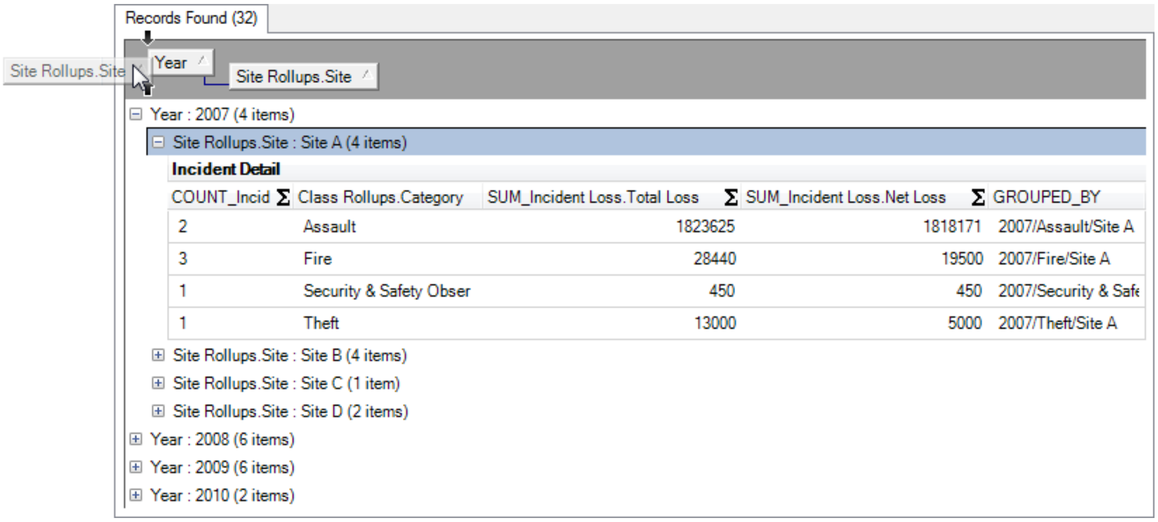
Group query results by a field

- To **group the results by a field**, drag the column heading to the grey box above the grid and drop it. All query results will automatically collapse, grouped by the column heading you just selected.



- 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 grey 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 **re-order the tiers** in your grouping, click and drag the column headings in the grey bar.



- To **remove a field** from your grouping, drag the column heading in the top grey bar and place it anywhere in the query results screen.

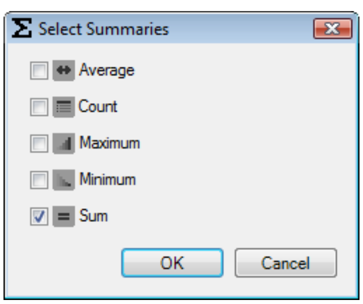
Perform calculations on query results

1. To perform calculations on data in query results that were created using the Group By option, select the **Outlook Group By** radio box in the View Style section. The **Sigma** symbol **Σ** will appear on all column headings. (If the Group By function was used to build the query, Sigma will automatically appear on column headings.)

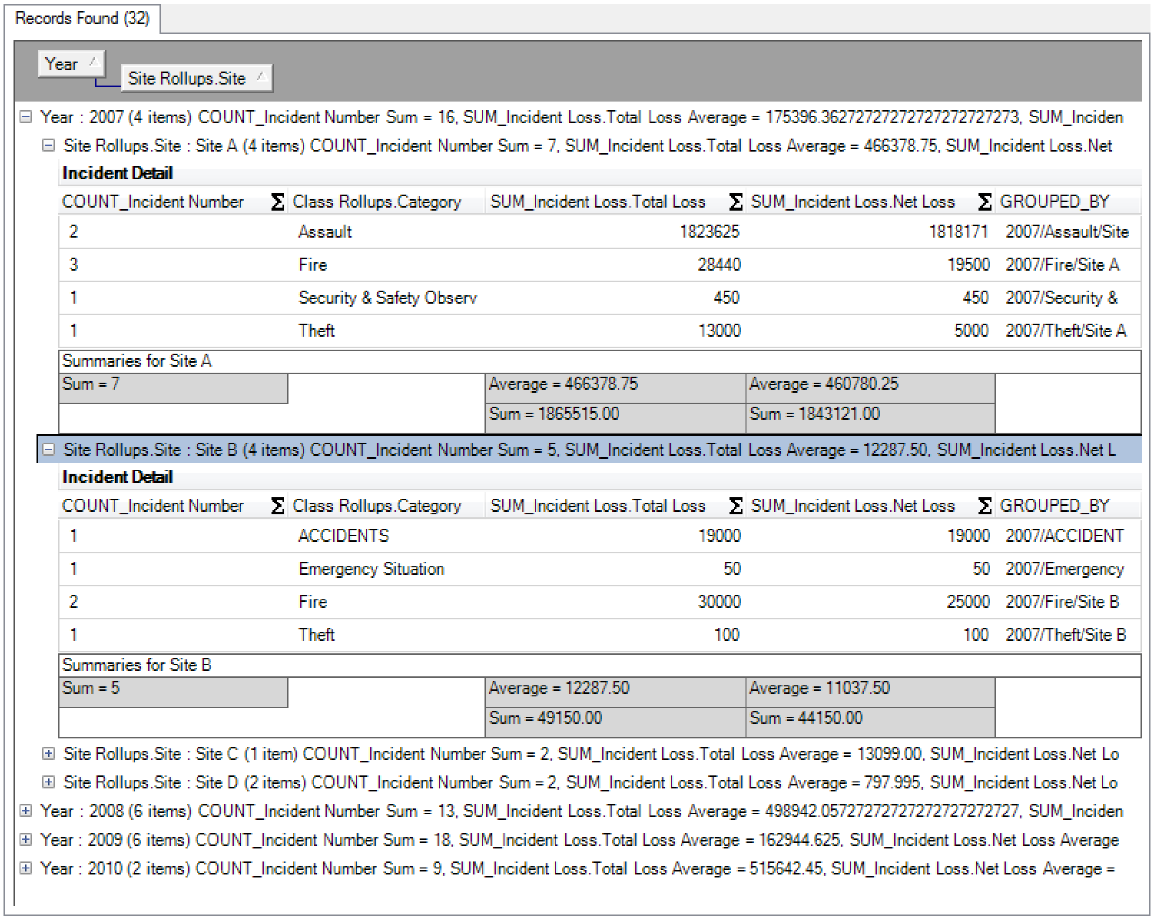
2. To perform data calculation on a column of data, click the **Σ** button at the top of the respective column. The Select Summaries dialog box will pop up.

3. Select the **type of calculation** that is required for the column (Average, Count, Maximum, Minimum and/or Sum). You can select more than one calculation option.

4. Click **OK**.



The calculation results will be displayed below the appropriate columns at the bottom of the query results. If your results were grouped by a field within the query results window, then the calculations will apply and be displayed for each group.



Export query results

1. To export query results, click **Export** on the top toolbar. A Windows Explorer window will pop up.

2. Choose the location for the new file and name the file and indicate the file type (e.g., Excel-Data (*.xls)). Click **Save**.

3. You will receive a confirmation message stating the export was successful. Click **OK**.

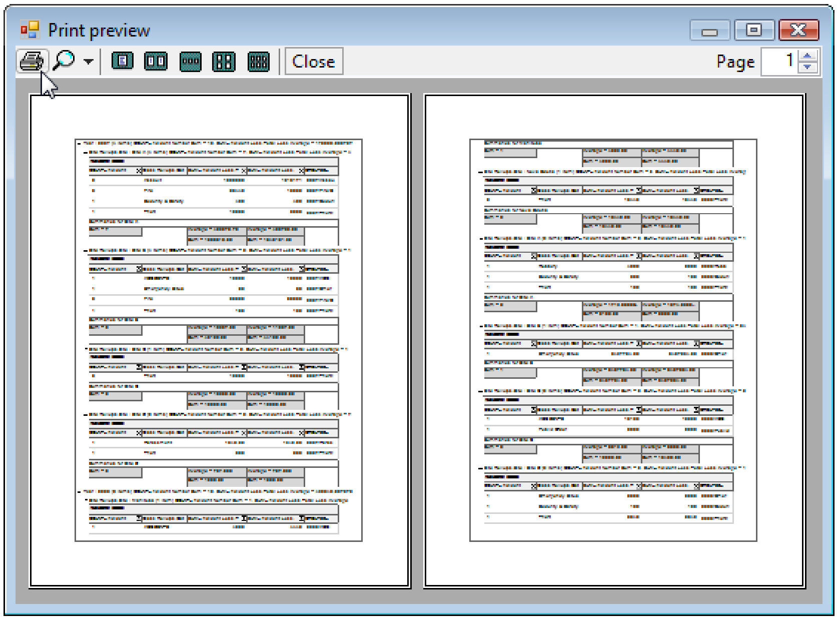
Print query results

1. To print the query results, first estimate the layout of your grid in relation to the **portrait layout**. If deemed necessary, scale the query results window to fit one portrait page.

2. Click **Print Grid** on the top toolbar. A Print Preview window will open.

3. Review the layout of the grid using the toolbar at the top of the screen.

4. Click the **Print** icon to print the grid.



Access records in query results and print reports

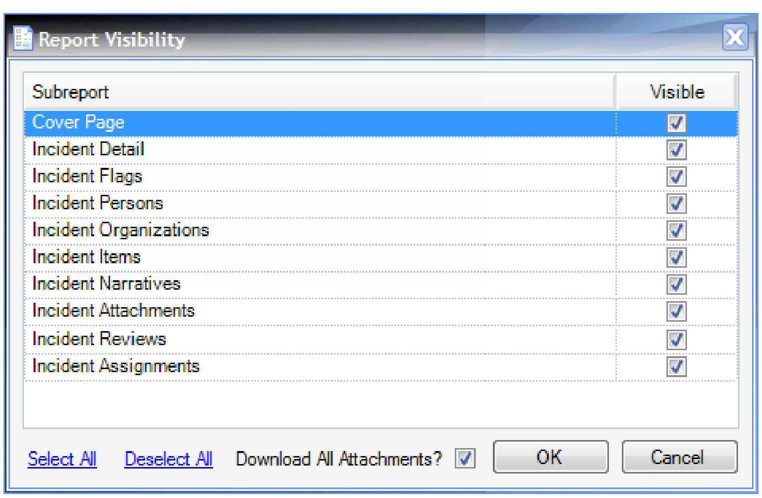
Note: These functions are not available if the Group By function was used to build the query.

To **view a record** from the list of records contained in your query results, select the record and click **View Detail**. The record will open in a separate window in the read-only mode.

To **print**, **email** or **save** one of the records listed in the query results, follow the steps below:

1. Select the record and click **Print Detail Report**.

2. A **Report Visibility** window will appear. This window contains checkboxes for all report sections containing data. By default, all boxes will be checked. Uncheck the boxes for any sections you do not wish to appear in your report. Check the "Download All Attachments?" box if you wish to download the attachments included in the record for printing. Then, click **OK**.



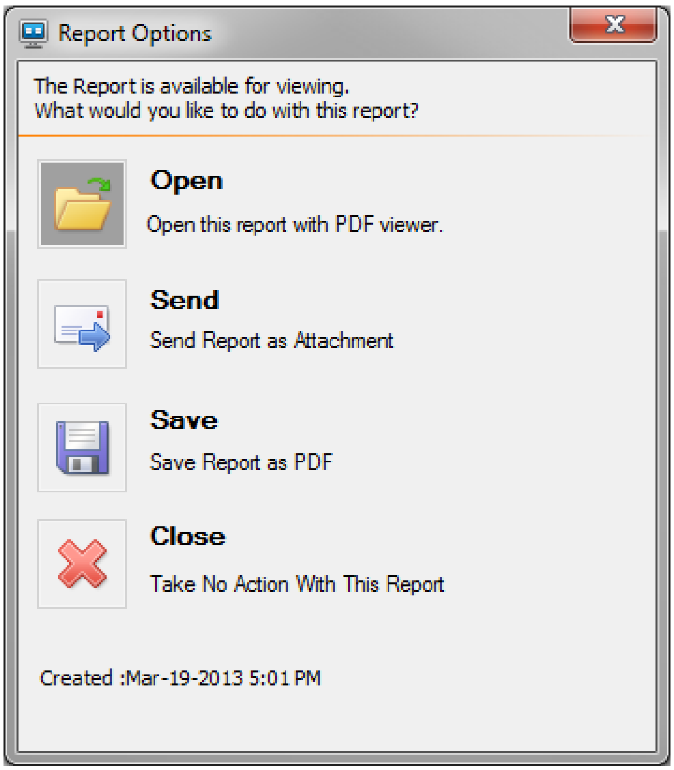
3. The **Report Options** window will open.

   a. Click the **Open** icon to instantly view a printable PDF copy of the report.

   b. Click the **Send** icon to send an email message with a PDF copy of the report attached.

   c. Click the **Save** icon to save a PDF copy of the report to the location of your choice.

   d. Click the **Close** icon to cancel the report.



Construct a visual link chart from query results

The function to perform visual analysis of query results is only available to organizations that have purchased Perspective Visual Analysis, an optional module for the Premium Edition of Perspective. If your system includes Perspective Visual Analysis, you can create a visual link chart representing the data relationships between records listed in the query results. Note that if the Group By function was used to build the query, this feature will be disabled.

Click anywhere in the query results and then select **View in Visual Analysis**. A separate Perspective Visual Analysis window will open with all the records listed in the query results contained within.

See the *Perspective Visual Analysis* section for further information on building a link chart, or click the Help icon in the Visual Analysis window.

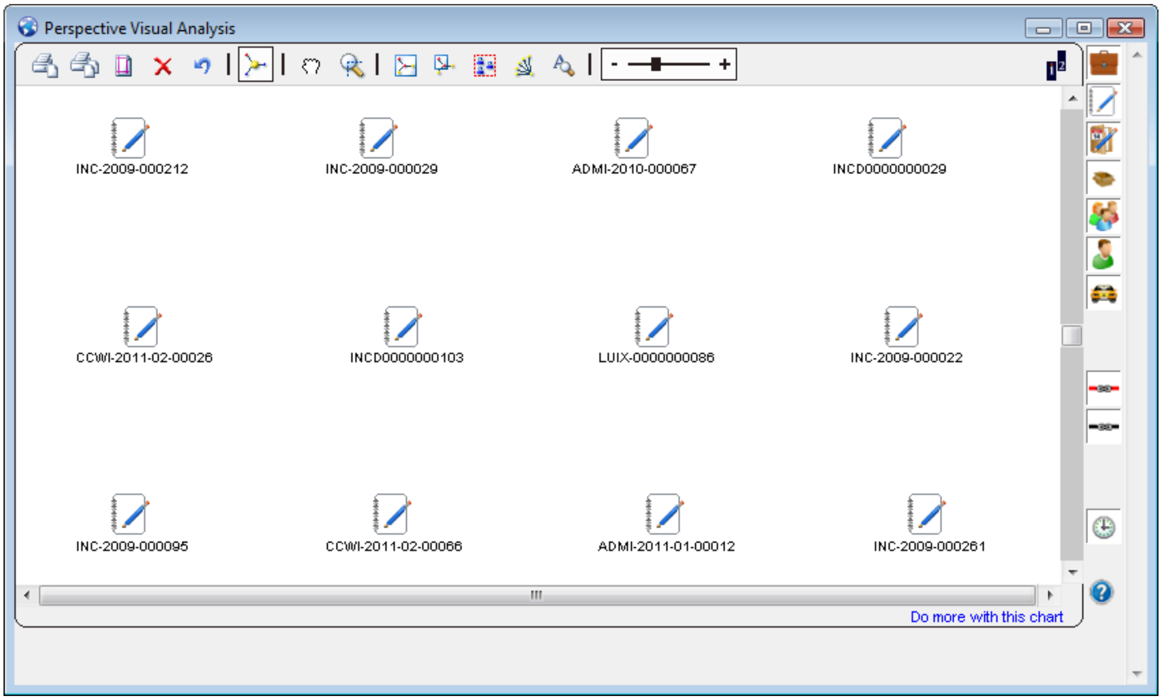


Chart query results

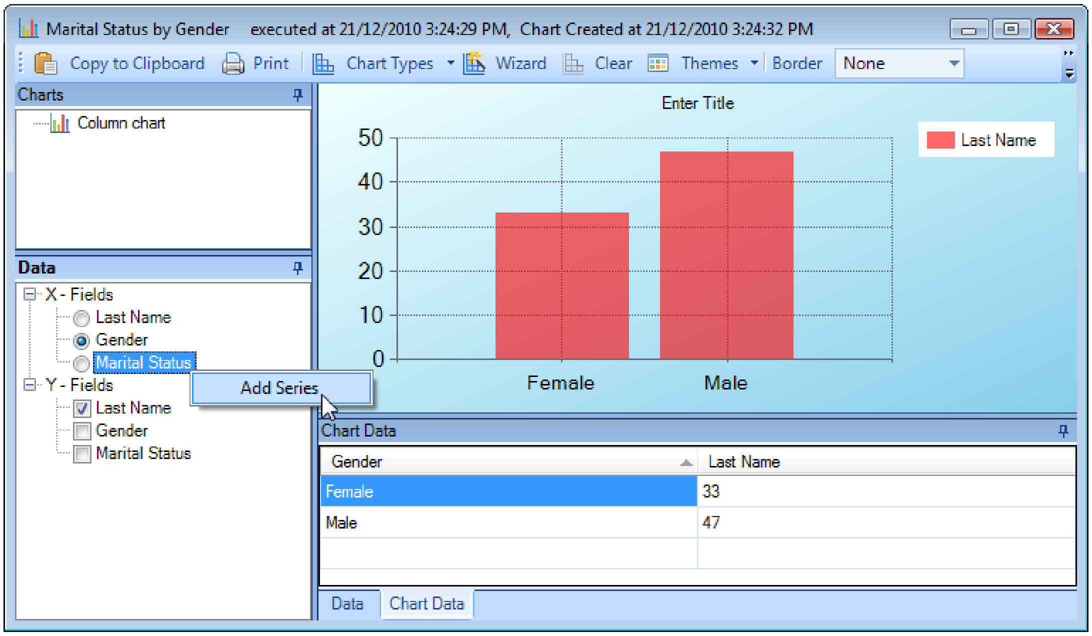
1. To begin charting your query results, click **Chart**. If your query results contain child data, you may choose to chart either parent records (e.g., Person Detail) or child records (e.g., Person Incidents Involvement) by selecting the appropriate data label under the attached lookup.

2. A charting window will open with a blank Viewing pane, a list of variables available for charting listed in the **Data pane** on the left, and a grid with raw chart data listed at the bottom **Data tab**. (In this section, we will be looking at the case of an organization that wants to know the proportions of marital statuses of their employees by gender.)

3. In the Data pane, select an **X-Field** (e.g., Gender) and a **Y-Field or multiple Y-Fields** (e.g., Last Name) for your chart from the available options. The X-Field data will appear on the horizontal x-axis of your chart. The Y-Field data will appear on the vertical y-axis of your chart. If you select more than one Y-Field, ensure that they have the same unit of value (e.g., dollars, items). Note that Y-Fields are always charted as numerical values. Generally, text fields are counted (e.g., quantity of Incident Numbers or Last Names), while numerical fields are summed (e.g., amounts of Incident Losses).

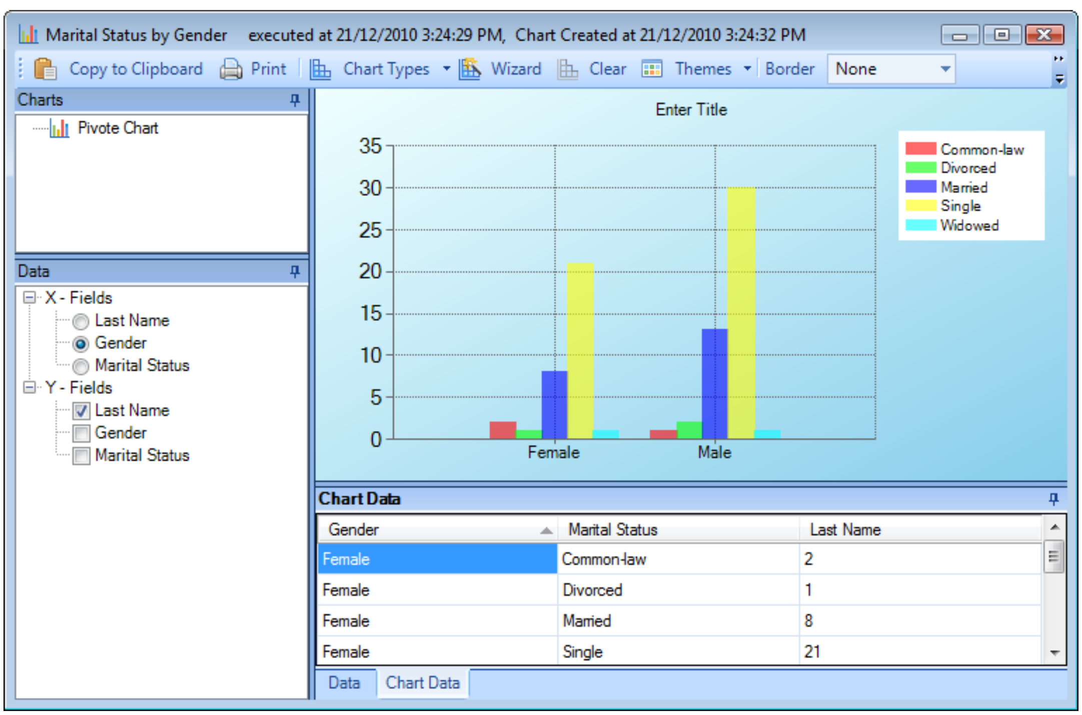
4. Your chart will appear in the Viewing pane. By default, your initial chart will be formatted as a Column chart. The bottom pane will display your selected **Chart Data**.

5. You may copy and paste data from the Data or Chart Data tabs into Excel by highlighting the data and then using the Ctrl+C and Ctrl+V keyboard commands.



6. If you wish 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".

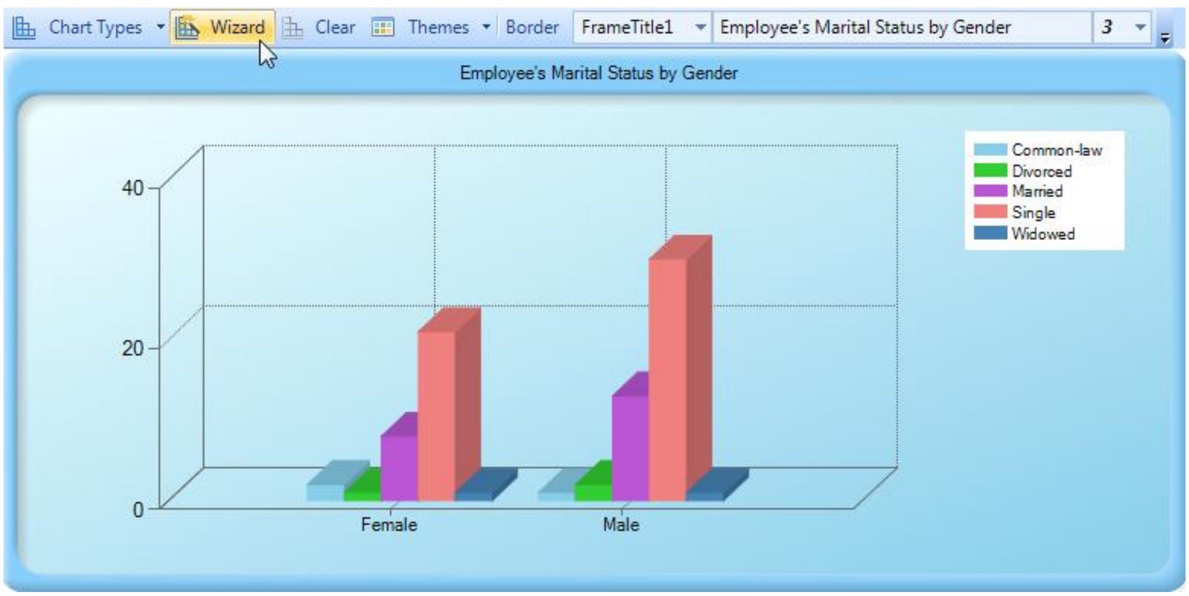
   a. To change the default Column chart to a different chart type, choose an option from the **Chart Types** lookup list (e.g., Pie, Bar, Area, etc.). The Charts pane will automatically populate with the name of the selected chart.

   b. To change the default **2D** (two-dimensional) chart to a **3D** (three-dimensional) chart, choose 3D in the drop-down menu on the toolbar. Click and drag the chart to rotate it and adjust its perspective.

   c. Enter a name for the chart in the **Title** text box.

   d. From the **Border** lookup list, select a border or frame style for the chart.

   e. In the **Themes** lookup list, select a color theme for your chart.



If the chart **does include a series field**, any customizing of the chart, including changing the chart type, must be done in the Chart Wizard.

8. To **copy your chart to clipboard** or **print it**, click the appropriate icon on the toolbar.

9. If you wish 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**, 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 re-assignment.
	Store e-Incidents in a Pending folder for review at a later date, if they contain insufficient information to accept or reject them.

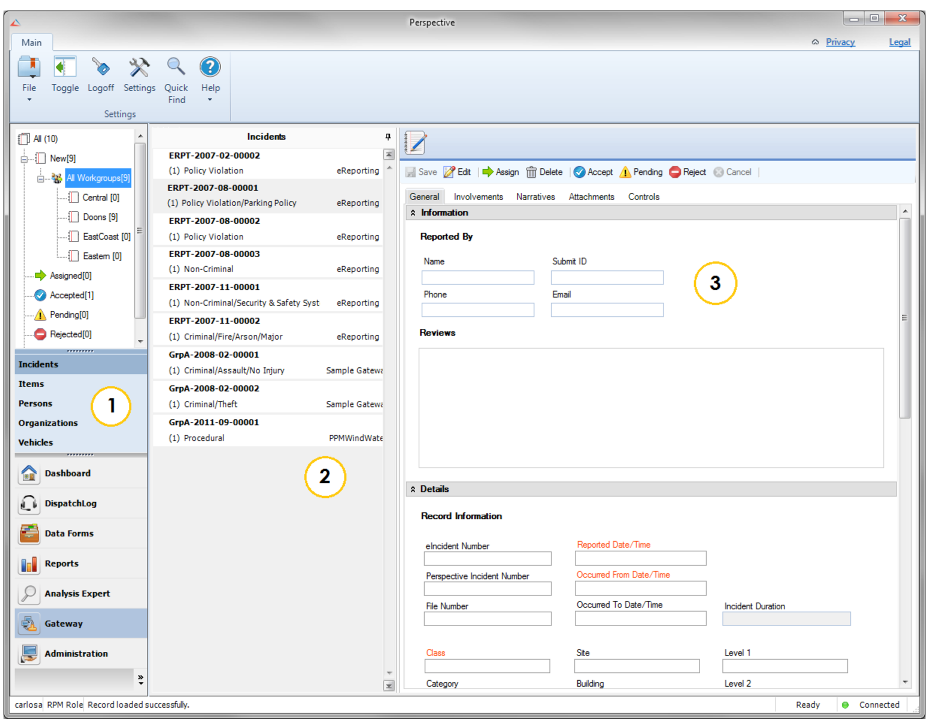
User Interface

The Gateway interface is divided into three sections:

1. **Navigation pane:** Allows you to move between various types of Gateway electronic reports corresponding to the major Data Forms (i.e., Incidents, Items, Persons, Organizations, and Vehicles). To display folders containing reports for a particular Gateway report type (i.e., New, Assigned, Accepted, Pending, Rejected and Deleted for Incidents; and New, Available, Added and Deleted for Items, Persons, Organizations and Vehicles), choose the required banner from the Navigation pane. Click on a folder in the Navigation pane to see all the reports contained within it listed in the Listing pane. If more than one workgroup's electronic reports are contained in the folder, subfolders for the appropriate workgroups will be listed beneath the folder name in the Navigation pane. Expand the **All Workgroups** subfolder and select a workgroup to see only its particular reports in the Listing pane.

2. **Listing pane:** Provides a list of electronic reports selected in the Navigation pane for viewing. On the right side of every report entry the system records a corresponding source of a report's import (e.g., e-Reporting). Once you select an e-Report in the Listing pane, the report's contents will be displayed in the Viewing pane on the right. (For Incident e-Reports, the submitted XML data is saved under the Attachments tab.)

3. **Viewing pane:** Displays the contents of an e-Report selected in the Listing pane and provides options for saving, editing, assigning, deleting, accepting, rejecting, and closing individual reports, as well as transferring them into Available or Pending modes and viewing their XML versions. Every Incident report consists of a set of tabs (i.e., General, Involvements, Narratives, Attachments, Controls and Audit History), while data for every Item, Person, Organization and Vehicle report is provided on one simple form.

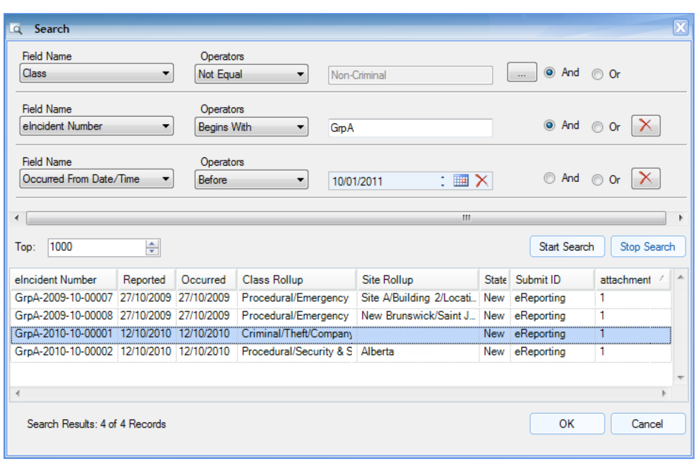


Note: If a folder in the Navigation pane contains more than 1000 e-Reports, you must first filter the report list before viewing it in the Listing pane. Once you click on the folder in the Navigation pane, a pop-up window will appear allowing you to filter the e-Incident list.

To display the top 1000 e-Reports (based on the reports' identification numbers), click **Start Search**. Click OK to transfer the list to the Listing pane.

To search for a particular e-Report or a set of e-Reports, set specific filtering criteria:

1. In the **Field Name** lookup list, select the field that you wish 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 wish.
4. If you wish 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 wish. To remove a field from your filtering criteria, click the **Delete** button .
5. By default, only the top 1000 reports matching the criteria that you set will be displayed. To display more or less, adjust the number in the **Top** field (from 1 to 2000).
6. Click **Start Search** to generate a list of reports matching your filtering criteria. A count of the number of e-Reports in the list, as well as the total number of e-Reports matching your filtering criteria, will be displayed at the bottom of the window.
7. To make changes to the ongoing search, click **Stop Search** first, and then make the necessary changes to the filtering criteria.
8. When you are satisfied with the list of e-Reports displayed, click **OK** to transfer the list to the Listing pane in the Gateway.



Incidents

Under the Incidents banner, the following folders will be displayed:

- ***New***: New e-Incidents that have not yet been assessed.
- ***Assigned***: e-Incidents assessed and assigned to a Gateway Approver for follow-up.
- ***Accepted***: e-Incidents that have been accepted into Perspective as valid Incident records by the Gateway Approver assigned to them (the only e-Incidents not available for editing).
- ***Pending***: e-Incidents that require further information before being assigned or deleted.
- ***Rejected***: e-Incidents that have been returned to the Gateway Administrator by the Gateway Approver.
- ***Deleted***: e-Incidents that have been marked for deletion upon purge. These can be re-assigned by the Gateway Administrator before the purge occurs.

Note: Not all folders will be visible to the Gateway Approver.

After selecting an e-Report in the Incidents Listing pane of the **New** folder, you can use the buttons available on the Viewing pane toolbar to perform a number of report functions.

Common functions available for both Gateway Administrator and Gateway Approver:

Save	Preserves the changes you made to an e-Report.
Edit	Transfers an editable e-Report into the editing mode. After clicking Edit, select the field you wish to edit and make the necessary change. Editing of e-Reports functions similarly to the data entry in Incidents data forms, including the use of a similar set of sub-tabbed toolbar functions, like **Edit**, **Add New**, **Remove** and **Read/View**. Remember to complete every report editing action with saving the changes applied to the report by clicking **Save** on the Viewing pane toolbar. *Note: For further details on the sections of the e-Incident report and functions performed by the toolbar functions that are available for certain sub-tabs (i.e., Involved Persons, Organizations, Vehicles, and Items), see the "Incidents" and "Common Record Functions" chapters.* *Note: The only editing function that is exclusively under the authority of the **Gateway Administrator** is setting of the e-Incident's security controls in the **Controls** tab (access level, organizational rollup and workgroup visibility). Although the e-Incident will have some default security controls, the Gateway Administrator may choose to re-set these in order to restrict both the Gateway Approver the e-Incident is assigned to (the Approver's access rights must match*

	those of the e-Incident in order to assess it), as well as users who have access to the record within Perspective if it is accepted as a valid Incident record.
Close	Exits the e-Report without saving changes.

Functions available for Gateway Administrator only:

Assign	Assigns the e-Incident to the Gateway Approver for further review by transferring the e-Incident to the **Assigned** folder. Once you click the Assign button, a pop-up confirmation window will appear. Make any necessary notes on the assignment of this e-Incident in the **Comments** text box. Your notes will appear in the Reviews section of the e-Incident under the General tab. Click **Assign** to confirm your choice. *Note: The **Gateway Approver's access rights** must match those designated under the e-Incident's Controls tab.*
Delete	Deletes an e-Incident as an invalid submission by transferring the e-Incident to the **Deleted** folder. Once you click the Delete button, a pop-up confirmation window will appear. Make any necessary notes on the deletion of this e-Incident in the **Comments** text box. Your notes will appear in the Reviews section of the e-Incident under the General tab. Click **Delete** to confirm your choice. *Note: e-Incident can be recovered anytime prior to the end of **Deleted Retention Period** specified for the e-Incident's workgroup by the System Administrator.*

Functions available for Gateway Approver only:

Accept	Accepts an e-Incident into Perspective as a valid Incident record, by transferring it to the **Accepted** folder. The accepted e-Incident will be available to users whose access rights match those designated under the e-Incident's Controls tab. Once you click the Accept button, a pop-up confirmation window will appear. Make any necessary notes on the acceptance of this e-Incident in the **Comments** text box. Your notes will appear in the Reviews section of the e-Incident under the General tab. Click **Accept** to confirm your choice. A dialog box will appear displaying the e-Incident's *new* **Perspective Incident Number**. For cross-referencing purposes, both the original **e-Incident Number** (e.g., INC-2010-000269) and the new **Incident Number** (e.g., EINC-2010-12-

	00001) will appear under the Record Information in the General tab of both the e-Incident record and the actual Incident data form. Click **OK**. *Note: The accepted e-Incident will be purged from the Gateway at the end of the **Accepted Retention Period** specified for the e-Incident's workgroup by the System Administrator. The original e-Incident form will remain in Perspective as an attachment to the newly created Perspective Incident record.*
Reject	Sends an e-Incident back to the Gateway Administrator for further review by transferring it to the **Rejected** folder, so that it could be re-assigned or deleted. Once you click the Reject button, a pop-up confirmation window will appear. Make any necessary notes on the rejection of this e-Incident in the **Comments** text box. Your notes will appear in the Reviews section of the e-Incident under the General tab. Click **Reject** to confirm your choice. To evaluate the reasons for the e-Incident's rejection by the Gateway Approver, edit the e-Incident, and/or delete or assign it again, the **Gateway Administrator** hat to access the rejected e-Incident from the Rejected folder.
Pending	Sets an e-Incident to Pending status, by storing it in the **Pending** folder. This function is used when there is insufficient information to accept or reject the e-Incident, and the Gateway Approver intends to make its review at a later date. Once you click the Pending button, a pop-up confirmation window will appear. Make any necessary notes on the pending of this e-Incident in the **Comments** text box. Your notes will appear in the Reviews section of the e-Incident under the General tab. Click **Pend** to confirm your choice.

Items, Persons, Organizations and Vehicles

Note: Item, Person, Organization and Vehicle reports can only be imported to the Gateway using the Import Manager.

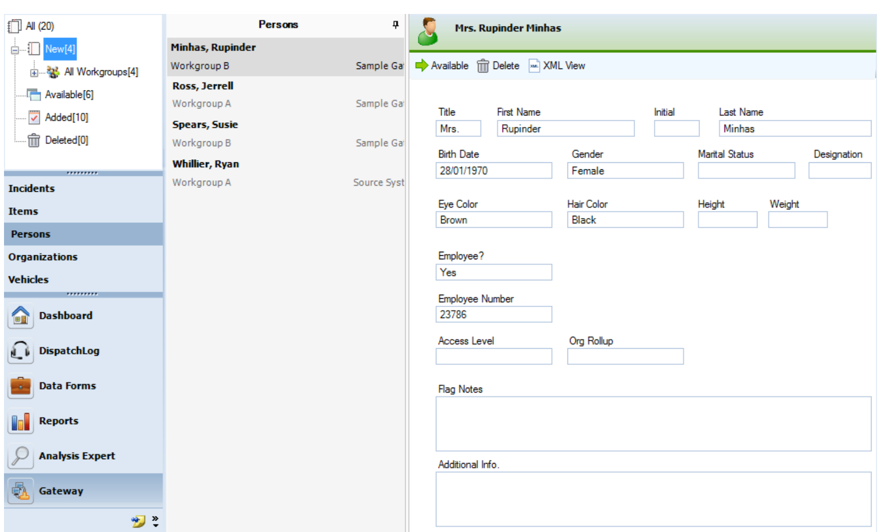
To view imported Item, Person, Organization or Vehicle reports, click on the appropriate banner in the Navigation pane. The following folders will be displayed:

- ***New***: New imported reports that have not yet been assessed.
- ***Available***: Imported reports that have been deemed valid, and made available for authorized users to add to the Perspective database.
- ***Added***: Imported reports that were first made available within Perspective, and then added by authorized users to the database as valid Item, Person, Organization or Vehicle records.

- ***Deleted***: Imported reports that have been marked for deletion upon purge. These can be made available for adding to the database before the purge occurs.

After selecting an e-Report in the appropriate Listing pane of the **New** folder, you can use the buttons available on the Viewing pane toolbar to perform the three basic report functions that are available for both the Gateway Administrator and the Gateway Approver.

Available	Makes a report available for authorized users to add to the Perspective database, while transferring it to the **Available** folder. If an authorized user chooses to add a new record to one of the Data Forms components, the data in the added report will be displayed as available for adding. Simultaneously, the report will be moved from the Available folder to the **Added** folder. At the end of the **Added Retention Period** specified for the report's workgroup by the System Administrator, the imported report will be purged from the Gateway. However, the **original XML report** will remain in Perspective as an attachment to the newly created Perspective Item, Person, Organization or Vehicle record.
Delete	Deletes a report from the Gateway as invalid. Once you click the Delete button, a pop-up confirmation window will appear. Choose the **Mark As Delete** radio button to store the imported report in the **Deleted** folder, where it can be recovered at any time prior to the end of the **Deleted Retention Period** specified for the report's workgroup by the System Administrator. Otherwise, choose the **Immediate Delete** radio button to permanently delete the report. Click **Delete** to confirm your choice.
XML View	Displays the imported report in its original XML format including hidden data, if available. Click the XML View button again to return to the standard view.



Perspective DispatchLog

Welcome to Perspective DispatchLog™, an optional module of Perspective by PPM 2000™ that 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 three functional 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 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.

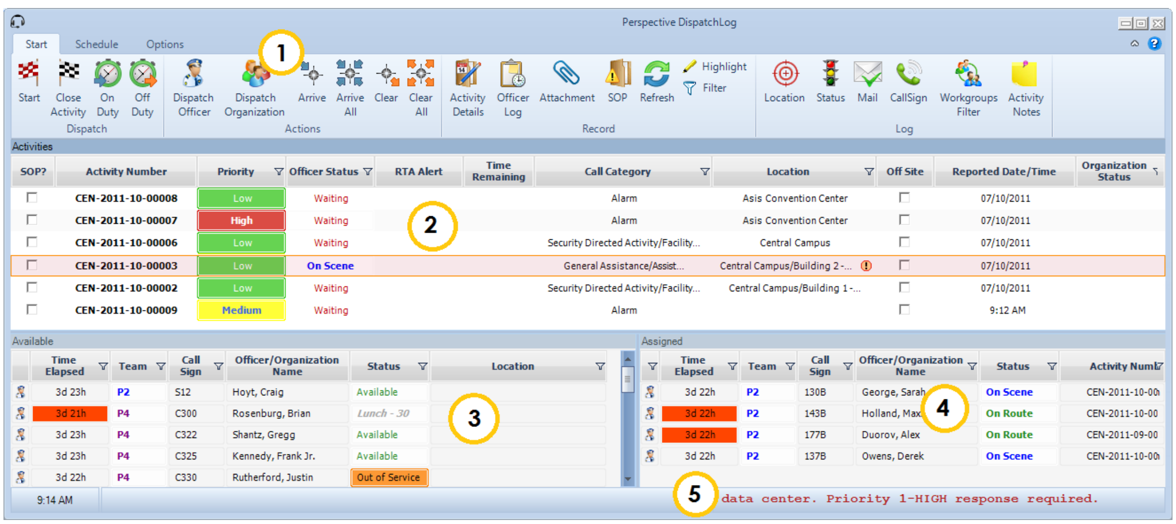
  ***Available pane* (3)**: Displays a list of officers and organizations on duty that are currently available to take on new activities. Along with the *Officer/Organization Name*, the pane displays the resource's current *Location*, *Call Sign* (only for officers), *Team* (only for officers)*, Status* 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 greyed 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 wish to concentrate on. If required, you may subsequently dock the resulting pane within the Options/Start tabs' interface and locate the referents of additional data contained in the pane on the other panes of DispatchLog.

At the bottom of the DispatchLog screen, you will notice the so-called **Status bar (5)** that contains the clock synchronized with the time set on your computer and that may display the running text note set for the *Site* of the Activity record that you selected in the Activities pane.



You can build the DispatchLog interface according to your preferences shifting the position of the panes on the screen, arranging them under tabs and dragging them out of the dock. To achieve the optimal arrangement of panes within or outside of the window, follow the simple procedures outlined below:

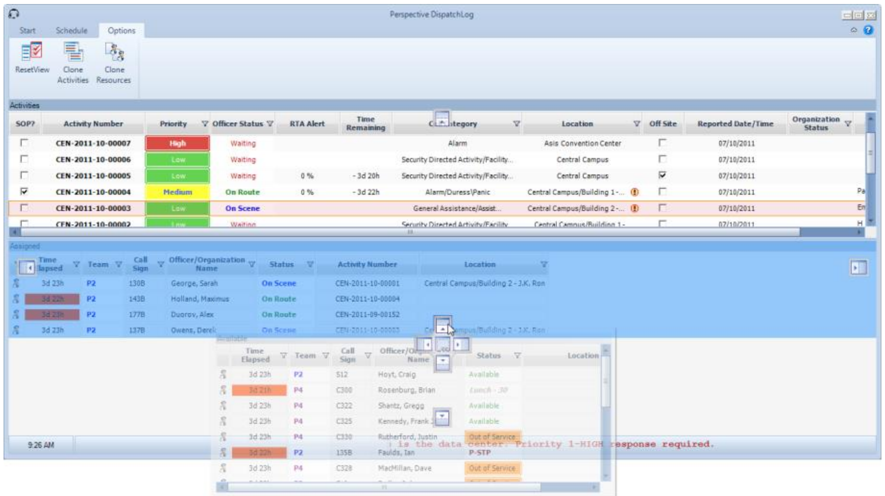
1. Drag the pane to its approximate desired location.

2. Select the exact positioning option from the set of position icons that appear on the screen. As you drag the pane to the icon, the system will mark the corresponding area where the pane will land if you drop it now.

3. If the blue area marks the position you wanted your pane to occupy, drop the pane. If not, drag the pane elsewhere.

4. To drag your pane out of the dock or dock it back into its previous location, double-click it.

5. To reset the arrangement of panes, open the **Options** tab and click the **Reset View** icon. Click **OK** on the pop-up window to confirm the operation.

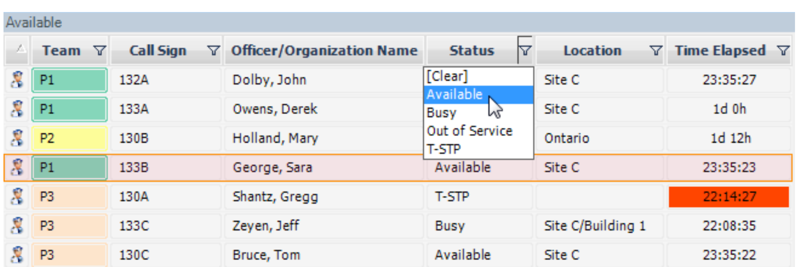


For your convenience, the panes are equipped with multiple filters that can be used to sort out a sub-group of entities that correspond to your desired criterion.

1. To display a sub-group 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.

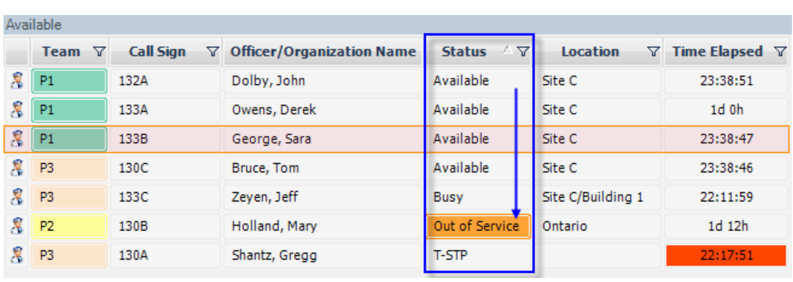
2. Select the specific value of interest for your criterion (e.g., Available). The grid will be automatically reduced to display just the entities that contain the value you selected (i.e., all officers and organizations that are available).

3. To remove the filter, click the corresponding filter icon again and select **[Clear]**.



Team	Call Sign	Officer/Organization Name	Status	Location	Time Elapsed
P1	132A	Dolby, John		Site C	23:35:27
P1	133A	Owens, Derek		Site C	1d 0h
P2	130B	Holland, Mary		Ontario	1d 12h
P1	133B	George, Sara	Available	Site C	23:35:23
P3	130A	Shantz, Gregg	T-STP		22:14:27
P3	133C	Zeyen, Jeff	Busy	Site C/Building 1	22:08:35
P3	130C	Bruce, Tom	Available	Site C	23:35:22

To sort the entities alphabetically based on one of the grid headers, simply click on the header. The arrow next to the header will indicate the sorting direction (i.e., ascending or descending).



Team	Call Sign	Officer/Organization Name	Status	Location	Time Elapsed
P1	132A	Dolby, John	Available	Site C	23:38:51
P1	133A	Owens, Derek	Available	Site C	1d 0h
P1	133B	George, Sara	Available	Site C	23:38:47
P3	130C	Bruce, Tom	Available	Site C	23:38:46
P3	133C	Zeyen, Jeff	Busy	Site C/Building 1	22:11:59
P2	130B	Holland, Mary	Out of Service	Ontario	1d 12h
P3	130A	Shantz, Gregg	T-STP		22:17:51

To update the contents of all the panes with the current state of the entire data set, click the **Refresh** icon located on the top toolbar. 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 either via icons or through keyboard shortcuts. If the function refers to a specific activity/officer/organization, you will first need to select the corresponding entity from one of the panes, and then click the icon or press the required combination of keys.

Icon	Program Command	Selected Entity	Shortcut Key(s)
	Start a new activity	Activity	<Ctrl> + <S>
	Email a basic Activity record	Activity	<Ctrl> + <M>
	Display activity details	Activity	<F6>
	Dispatch an organization	Activity	<Ctrl> + <B>
	Update all officers' and organizations' statuses to "On Scene" for the selected activity	Activity	<Ctrl> + <A>
	Add activity notes	Activity	<Ctrl> + <N>
	Add an attachment to the selected activity	Activity	<Ctrl> + <T>
	Display the associated Standard Operation Procedures	Activity	<Ctrl> + <P>
	Display assigned officers/organizations for the selected activity only	Activity	<Ctrl> + <F>
	Highlight assigned officers/organizations for the selected activity only	Activity	<Ctrl> + <H>
	Display activities filtered by specific workgroup(s)	—	<Ctrl> + <W>
	Clear all officers and organizations from the selected activity	Activity	<Ctrl> + <L>
	Close an activity	Activity	<Ctrl> + <O>

	Bring an officer on duty	—	<F8>
	Dispatch an officer	Available Officer	<Ctrl> + <D>
	Update an officer’s Call Sign	Officer	<Ctrl> + <E>
	Update an officer’s/organization’s Location	Officer/Organization	<Ctrl> + <I>
	Update an officer’s/organization’s Status	Officer/Organization	<Ctrl> + <K>
	Update an officer’s/organization’s Status to “On Scene”	“On Route” Officer/Organization	<F2>
	Clear an officer/organization from the selected activity	Officer/Organization	<F3>
	Bring an officer off duty	Available Officer	<F9>
	Display officer log	Officer/—	<F7>
	Refresh the screens	—	<F5>
—	Delete an activity	(Scheduled) Activity	<F11>
	Add a new scheduled activity	—	<Ctrl> + <1>
	Edit a scheduled activity	Scheduled Activity	<Ctrl> + <2>
	Delete a scheduled activity	Scheduled Activity	<F11> <Ctrl> + <3>
	Copy a scheduled activity	Scheduled Activity	<Ctrl> + <4>
	Transfer a scheduled activity to the current activities list under the Start tab	Scheduled Activity	<Ctrl> + <S>
	Reset the current panels’ layout to default	—	<Ctrl> + <R>
	Clone activities for a separate window display and filtering	—	<Ctrl> + <X>
	Clone resources for a separate window display and filtering	—	<Ctrl> + <U>

Create and Manage an Activity

Start a New Basic Activity Record

1. To start a new current activity, open the **Start** tab and click on the **Start** icon on the toolbar. The blank Activity Details form will pop up.

2. 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.

3. 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.

4. Using the **Priority** lookup, you may overwrite the default priority value set for the call category selected in the previous step.

5. 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.

6. If the activity took place off site, check the **Off Site** box.

7. In the **Description** text field, enter a detailed description of the activity.

8. Select the means of receiving the call from the **Call Source** lookup (e.g., Phone, Alarm).

9. 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.

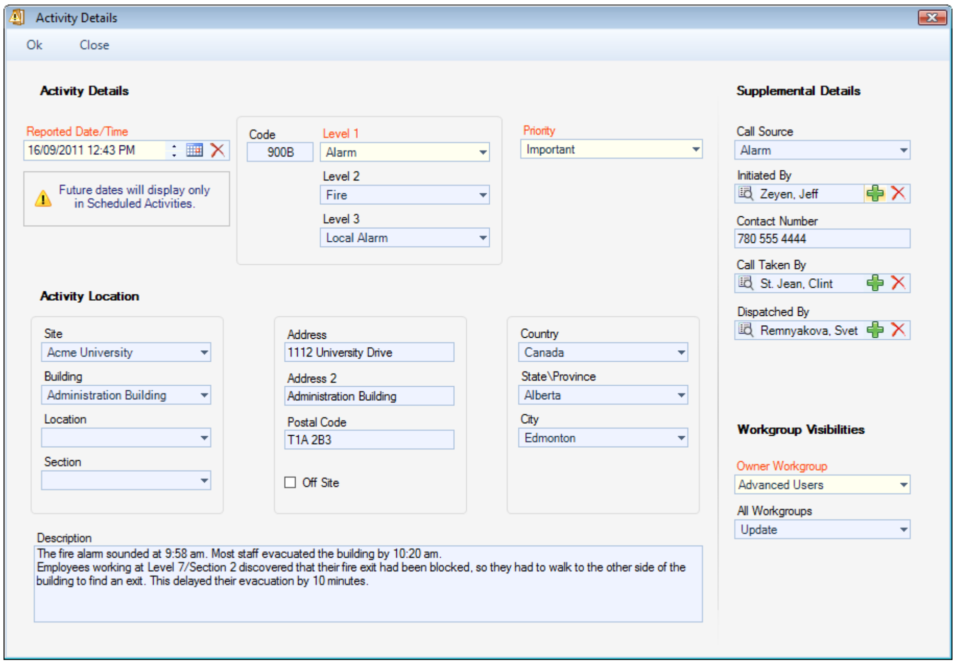
   - **Call Taken By**—The person who is responsible for recording the call. By default, the call taker is the person who creates the original Activity record.

   - **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.

10. Under Workgroup Visibilities, specify the name of the workgroup that is responsible for the activity in the **Owner Workgroup** field.

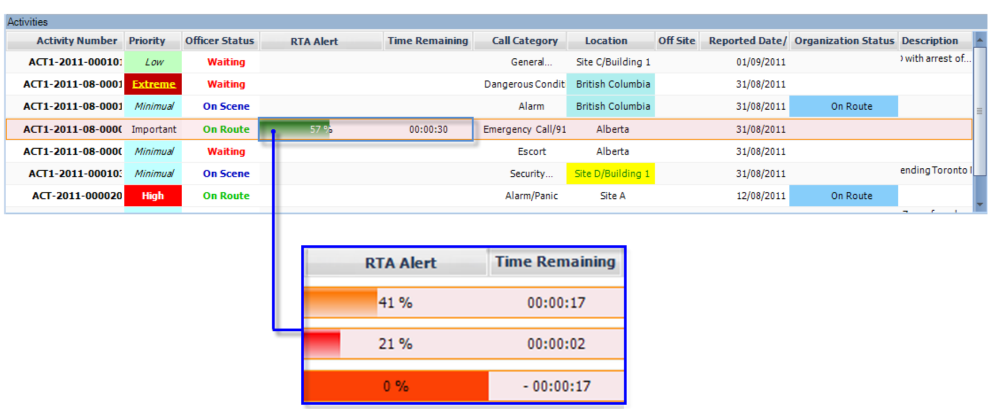
11. From the **All Workgroups** lookup, select the rights that are assigned to all other workgroups in relation to the created activity (e.g., None, Update or Read).

12. 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".



13. 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.

14. If your system's setup includes a Regulated Time to Act 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, 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.



15. To attach supplemental information to the basic Activity record, including the details of responses, requests, involvements, attachments and assignments, double-click the Activity record or select it on the Activities pane and click **Activity Details**. The Activity record will contain additional tabs that can be used to create a complete activity, which is comparable to the records created in Perspective's Activity component, within the DispatchLog module. For further details, please refer to the rest of the sections contained in the "Create and Manage an Activity" chapter.

Record an Officer's Response to an Activity

This section will introduce an additional method of documenting past officers' responses to an Activity record. On the surface, it is a concise way of recording the whole dispatch process of multiple officers for a single activity, as described throughout the "Dispatch an Officer for an Activity", "Update an Officer's/Organization's Status", "View or Update an Officer's/Organization's Location", "Update an Officer's Call Sign", "Abandon an Activity Record", and "Clear an Officer/Organization from an Activity" chapters.

1. Double-click the Activity record you wish to edit or select it on the Activities pane and click **Activity Details**.

2. Select the **Responses** tab. Then, open 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.

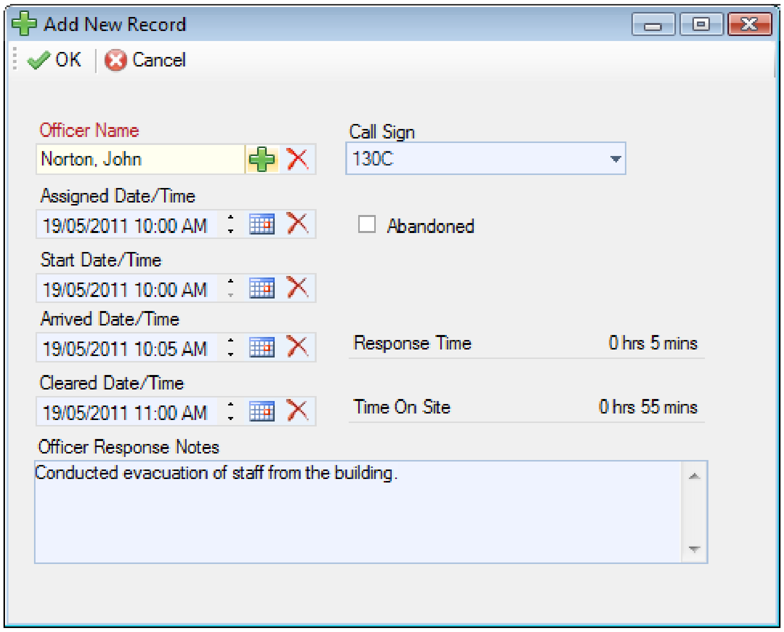
5. The **Call Sign** field will auto-populate with the selected officer's call sign abbreviation.

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

   - **Assigned Date/Time**—The date and time 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 the re-assignment 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.

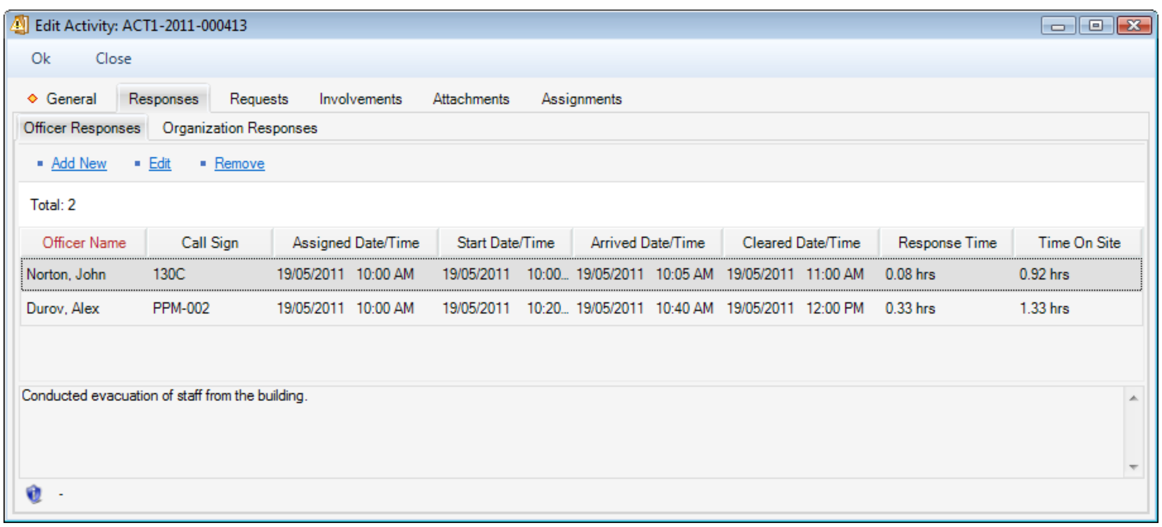
7. Once the appropriate dates and times have been entered, the system will calculate how long it took the officer to respond (**Response Time**) and how long they remained on site (**Time On Site**).

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



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

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



Record an Organization's Response to an Activity

This section will introduce an additional method of documenting past organizations' responses to an Activity record. On the surface, it is a concise way of recording the whole dispatch process of multiple organizations for a single activity, as described throughout the "Dispatch an Organization for an Activity", "Update an Officer's/Organization's Status", "View or Update an Officer's/Organization's Location", "Abandon an Activity Record", and "Clear an Officer/Organization from an Activity" chapters.

1. Double-click the Activity record you wish 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. Locate the image file in the browser window and click Open.

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

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 organization has been notified of the activity in the **Notified By** lookup list.

11. 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.

12. 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.

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

14. 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.

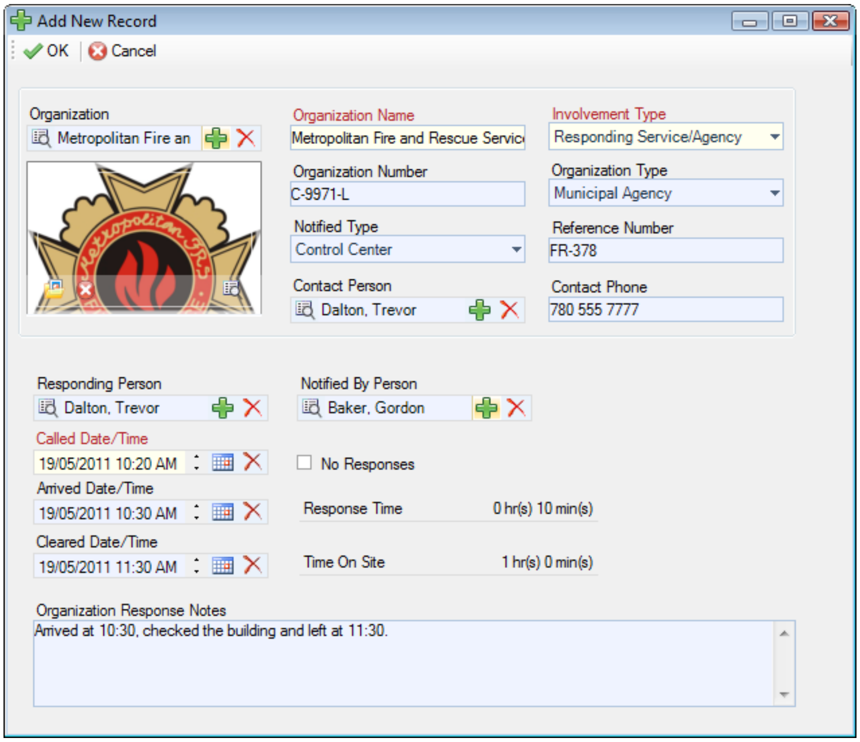
15. Track temporal progress of organization response by specifying the following time points:

    - **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.

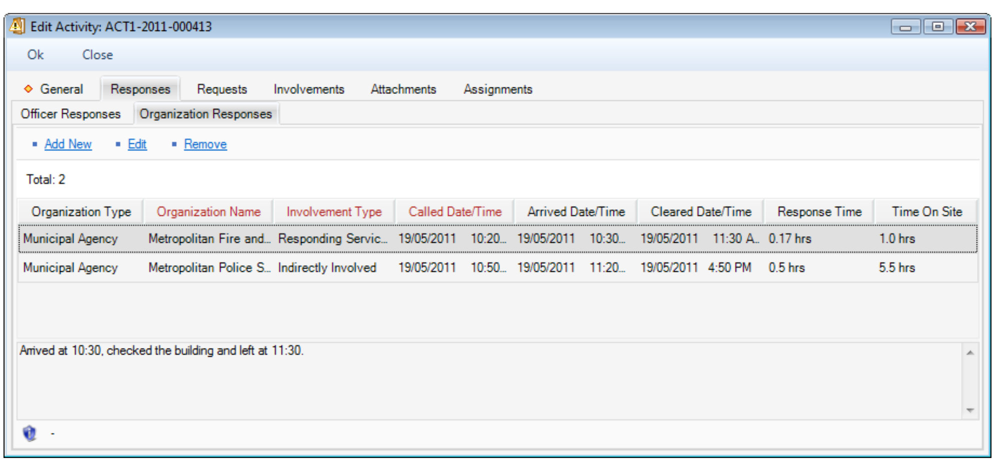
16. Once the appropriate dates and times are entered, the system calculates how long it took the organization to respond (**Response Time**) and they remained on site (**Time On Site**).

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



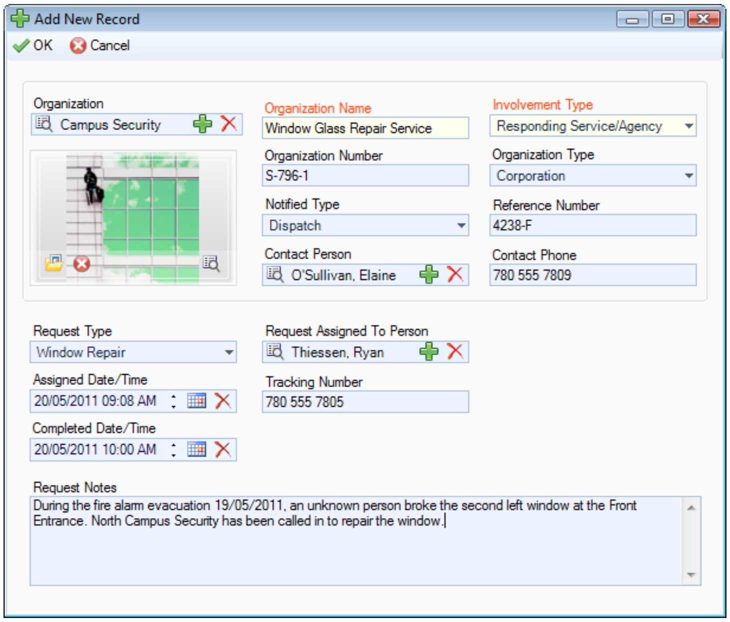
18. Click **OK**. The new organization's response entity will be saved as an entry in the Organization Responses table.

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



Note an Action Request for an Activity

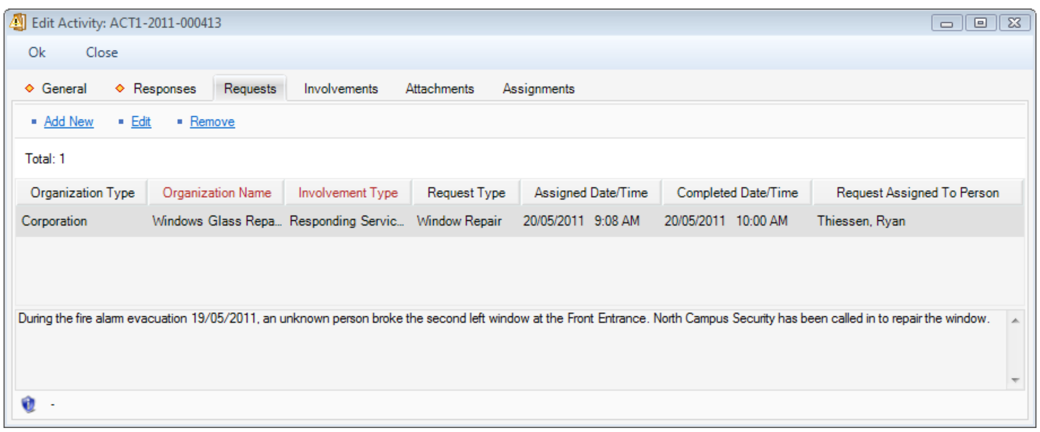
1. In order to document an action request for an activity, double-click the Activity record or select it on the Activities pane and click **Activity Details**.
2. Select the **Requests** tab.
3. Click **Add New**. A pop-up window will open.
4. Select the requested organization's record from the **Organization** pick list. If the corresponding Organization record does not already exist, use the Quick Add function to create one.
5. The **Organization Name** field will now automatically populate with the linked organization's name. Depending on the data available, some additional fields may also populate with information drawn from the linked Organization record.
6. To add the organization's **logo** to the record, click the Add icon in the image box. 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. Enter the contact person's phone number under **Contact Phone**.
13. Choose the appropriate description for the requested action (e.g., Maintenance, Escort, Window Repair) from the **Request Type** lookup list.
14. 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.
15. Enter the date and time the request was made in the **Assigned Date/Time** field. When the action is complete, input the **Completed Date/Time**.
16. If there is a tracking or other ID number assigned to the action request, enter it in the **Tracking Number** field.



17. Enter any additional **Request Notes**.

18. Click **OK**. The new action request entity will be saved in the Organization Responses table.

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



Add Persons Involved in an Activity

Note general details of an involved person

1. In order to add an involved person to an Activity record, double-click the record or select it on the Activities pane and click **Activity Details**.

2. Select the **Involvements** tab, 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.

5. 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.

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

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

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

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

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

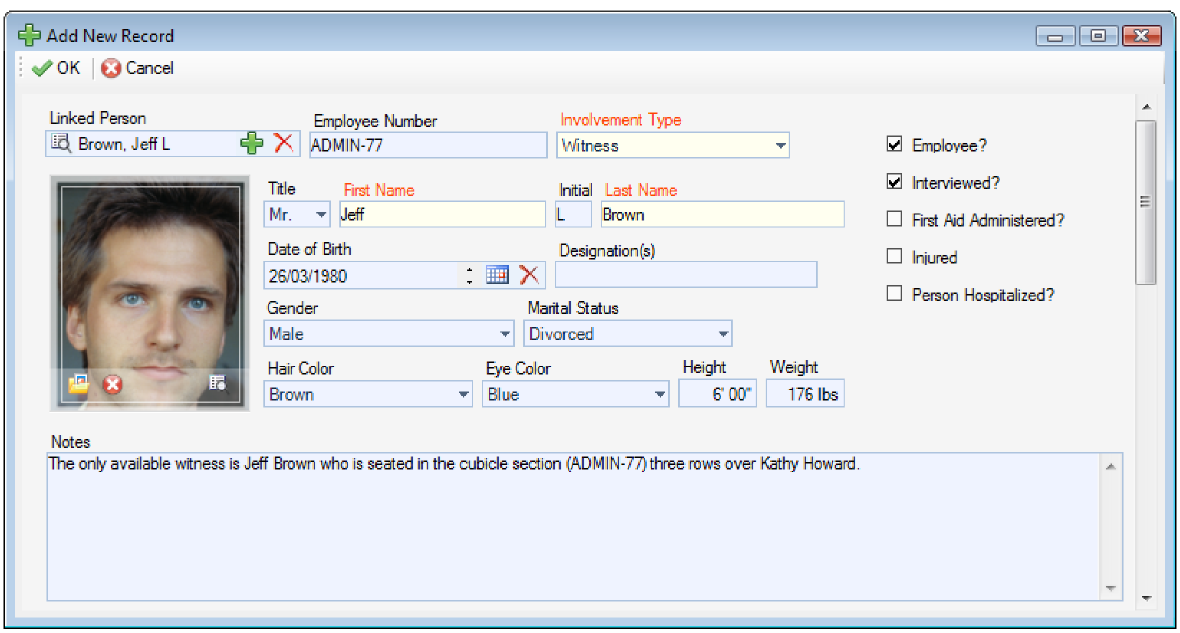
11. If the person was interviewed regarding the occurrence, check the **"Interviewed?"** box.

12. 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.

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

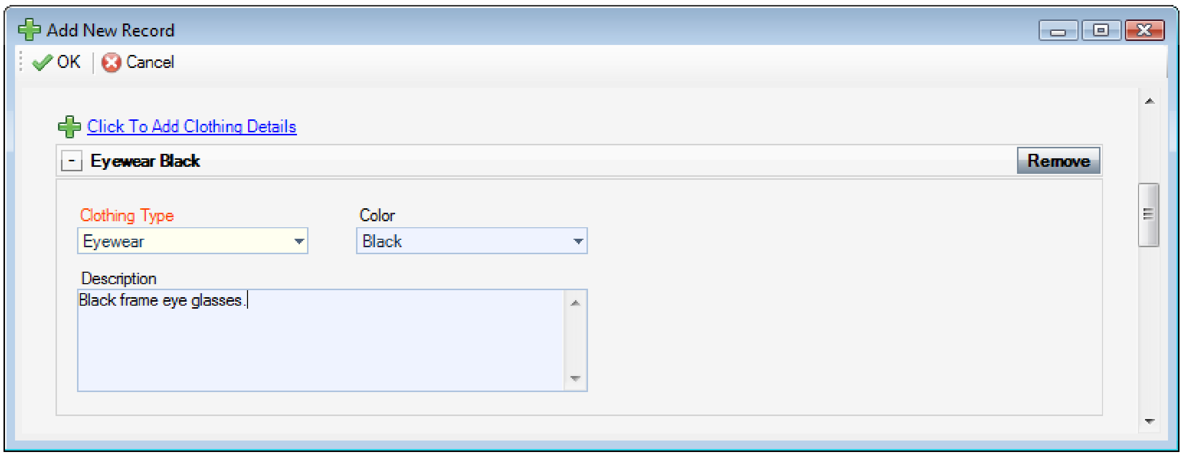
14. To add a photo of the involved person to the record, click the Add icon in the image box. Locate the image file in the browser window and click Open.

15. Click **OK** to save the involved person's sub-record.



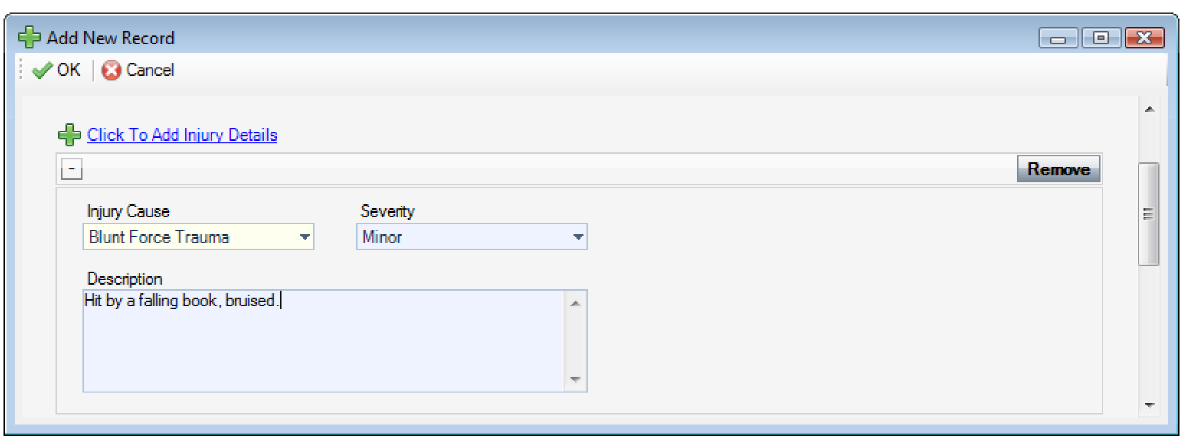
Add the involved person's clothing details

1. Open the saved involved person's sub-record.
2. Open the **"Click to Add Clothing Details"** link.
3. Choose the **Clothing Type** and **Color** from the lookup lists.
4. Enter a detailed description of the item in the **Description** box.
5. Click **OK**, and repeat for as many articles of clothing as necessary.



Record the involved person's sustained injuries

1. Open the saved involved person's sub-record.
2. Open the **"Click to Add Injury Details"** link.
3. Specify the **Injury Cause** and **Severity**.
4. Include a detailed description of the injury in the **Description** text box.
5. Click **OK**, and repeat for as many injury entities as necessary.



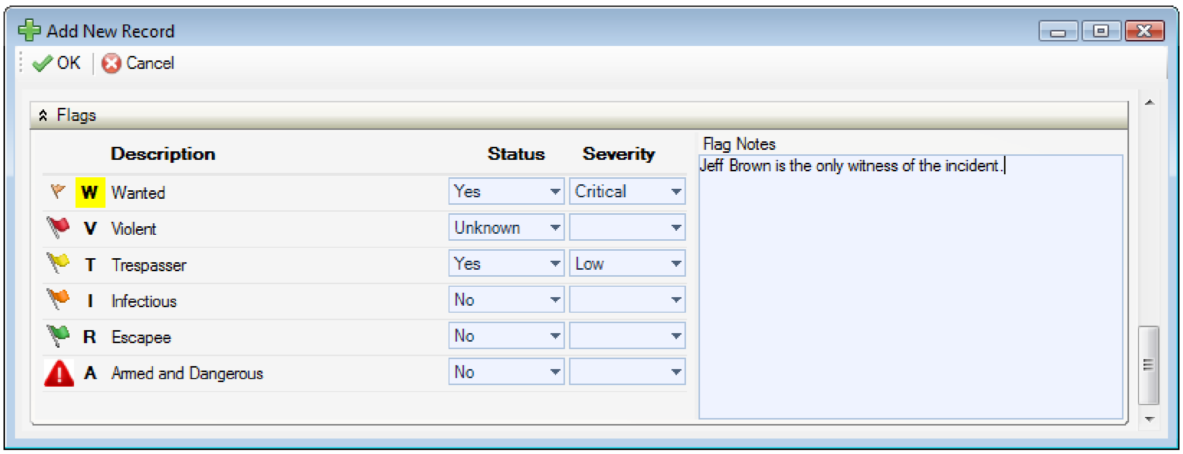
Flag the involved person

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

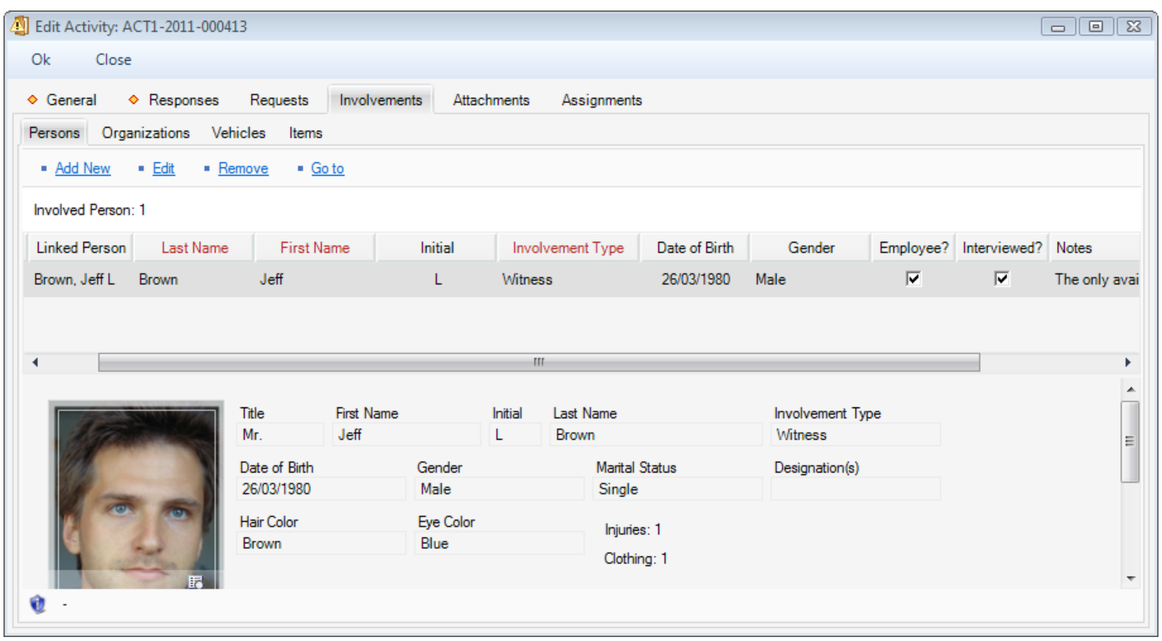
2. In the **Flags** section, specify the **Status** (i.e., Yes, No or Unknown) as well as the **Severity** of each flag (e.g., Critical, High, Low). Flags may include such descriptions, as Trespasser, Violent, Infectious, Escapee, Wanted, etc.

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

4. Click **OK**.

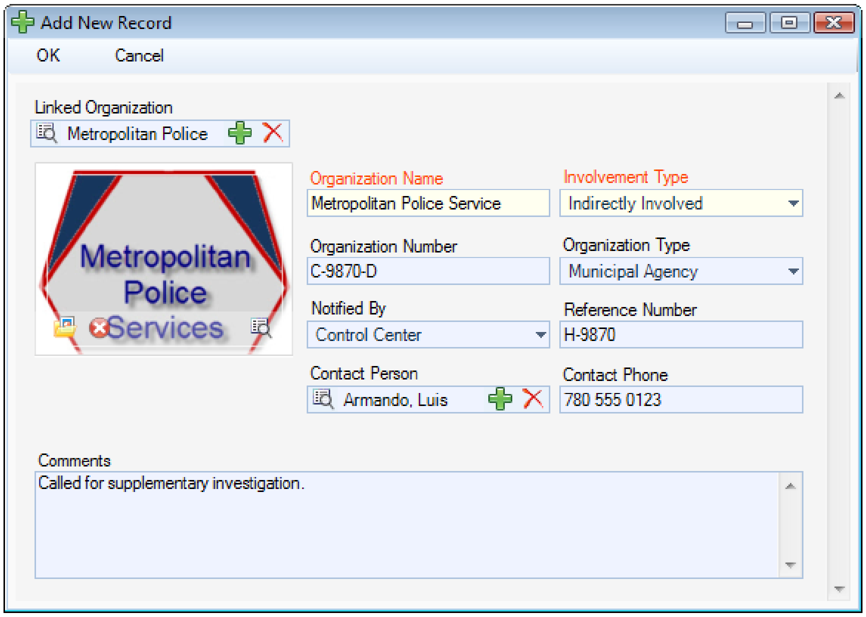


5. Click **OK** on the activity's form to save the changes made to the record.

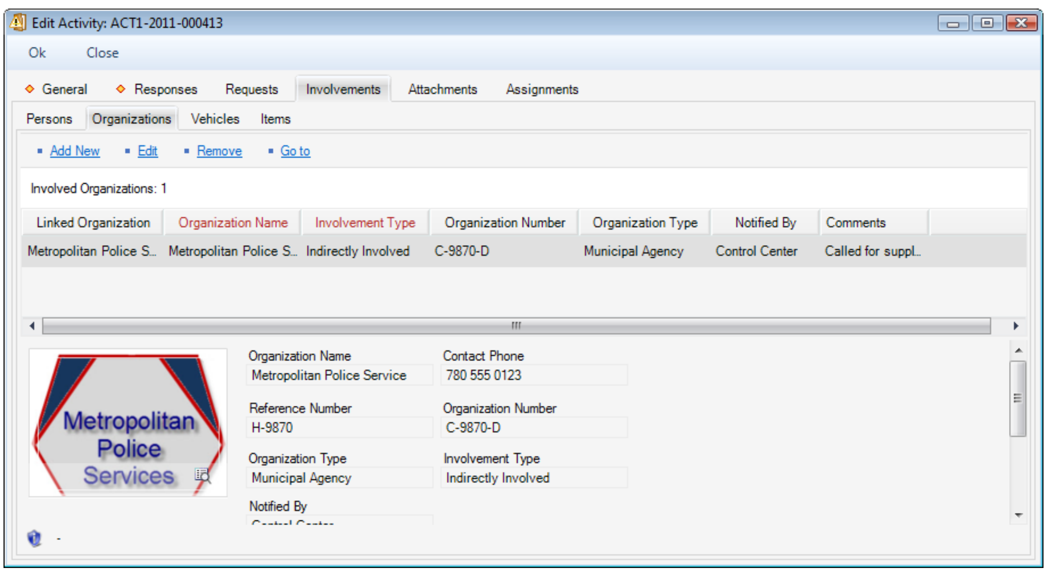


Add Organizations Involved in an Activity

1. In order to add an involved organization to an Activity record, double-click the record or select it on the Activities pane and click **Activity Details**.
2. Select the **Involvements** tab, 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.
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. 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. Locate the image file in the browser window and click Open.



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



Add Vehicles Involved in an Activity

1. In order to add an involved vehicle to an Activity record, double-click the record or select it on the Activities pane and click **Activity Details**.
2. Select the **Involvements** tab, 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.

5. 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.

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

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

8. 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.

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

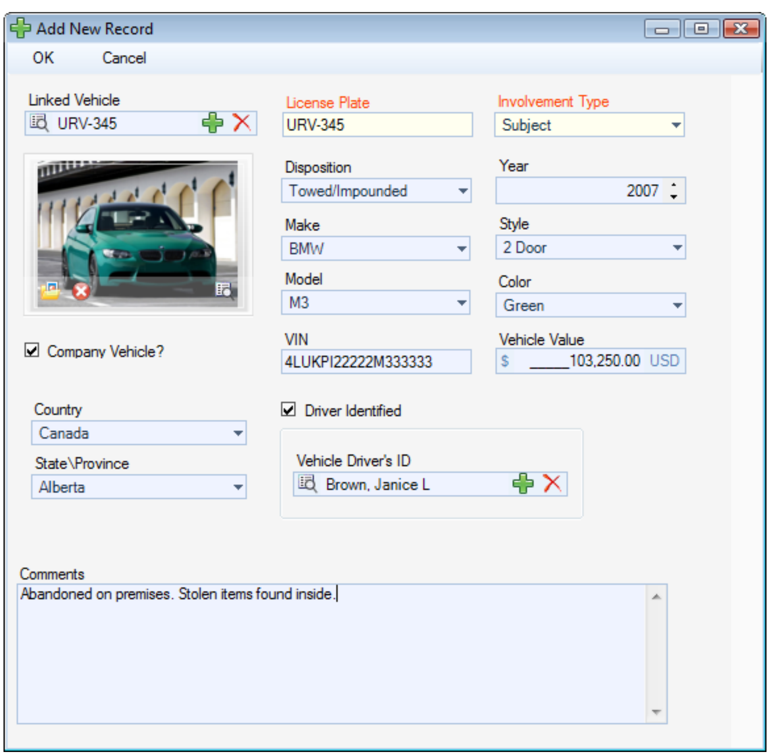
10. If the vehicle belongs to your organization, check the **"Company Vehicle?"** box.

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

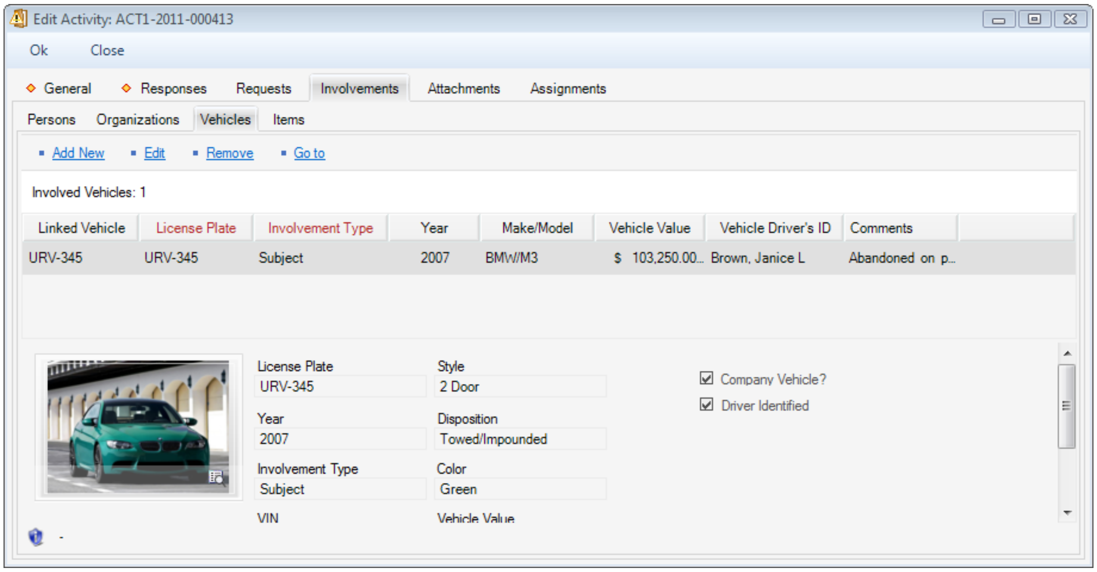
12. If the vehicle's driver was identified, check the **Driver Identified** box. Then, select the driver's name from the **Vehicle Driver** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.

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

14. To add a photo of the vehicle to the record, click the Add icon in the image box. Locate the image file in the browser window and click Open.



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



Add Items Involved in an Activity

1. In order to add an involved item to an Activity record, double-click the record or select it on the Activities pane and click **Activity Details**.

2. Select the **Involvements** tab, 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.

5. 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, etc.).

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

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

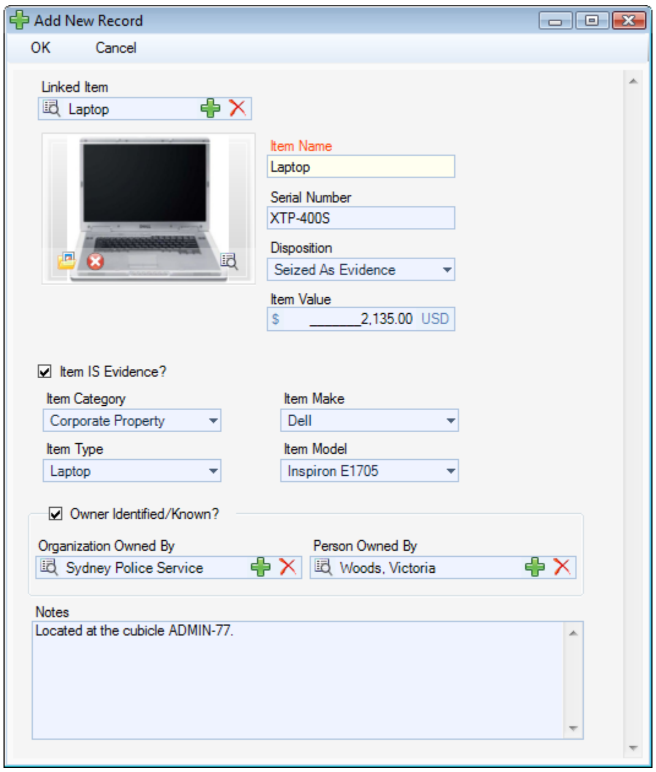
10. Identify the general classification of the item by making selections from the **Item Category** and **Item Type** lookup lists. These fields are hierarchical.

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

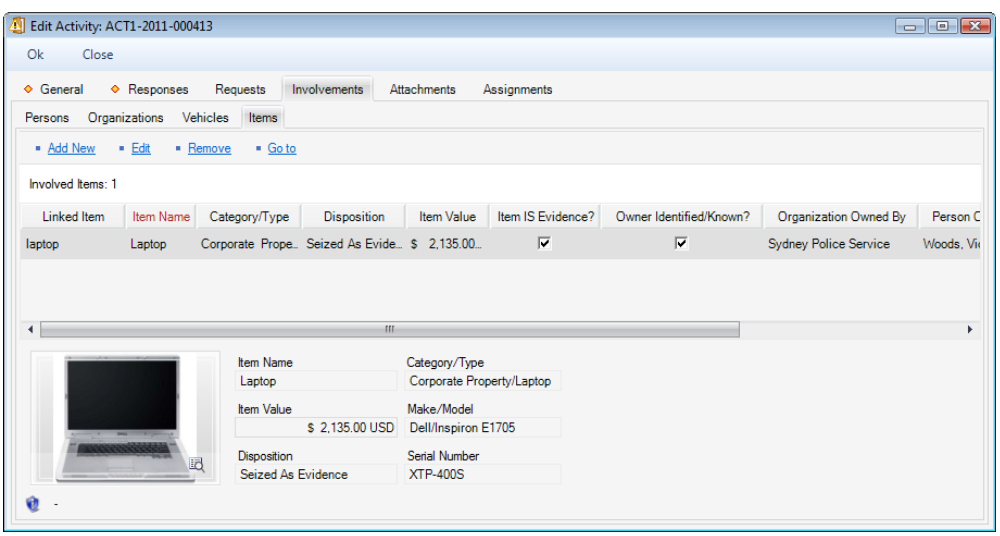
12. If the item's owner is known, check the **"Owner Identified/Known?"** box. Then, select the name of the organization or person that owns the item from either the **Organization Owned By** or **Person Owned By** pick lists. If an Organization or a Person record does not already exist, use the Quick Add function to create one.

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

14. To add a photo of the item to the record, click the Add icon in the image box. Locate the image file in the browser window and click Open



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



Add an Attachment to an Activity Record

There are three ways to add attachments to an activity – via the **Activity Details** option, via the **Attachment** option and simply by dragging a file you wish to attach with the mouse to the relevant Activity record. The former option provides an opportunity to view any of the attached files, if required. The latter option is the quickest option, as it immediately transfers you to the step 3, skipping the first two formal steps of the other options.

1. In order to add an image, media file or a document to an Activity record, select the record on the Activities pane and either click **Activity Details**, open the **Attachments** tab and click **Add New**, or click **Attachment**. *If you prefer a quicker option, drag the file you wish to attach to the Activity record on the Activities pane.* A pop-up window will open.

2. Add attachments by either dragging and dropping or clicking **Browse**.

3. For each attachment:

    a. The **Attachment Title** field will automatically populate with the name of the attached file. If necessary, modify the name.

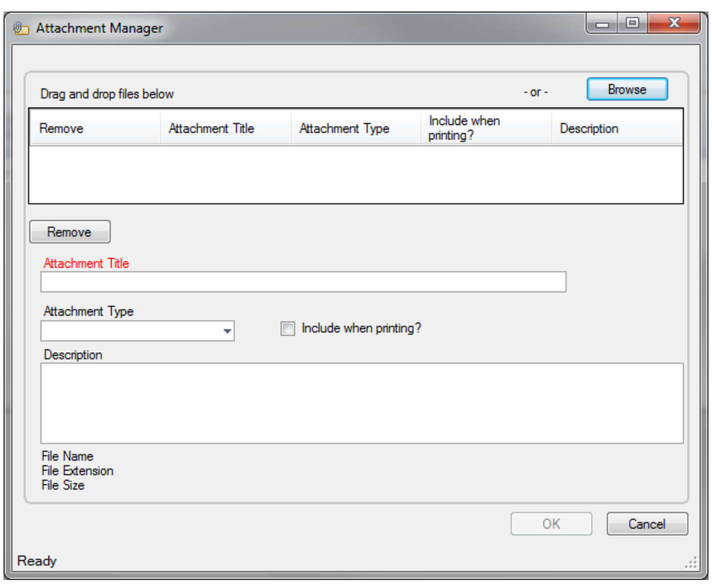
    b. From the **Attachment Type** lookup list, select the appropriate designator for the attachment (e.g., Document, Picture, Video, Voice Recording).

    c. Give an overview of the attachment in the **Description** text box.

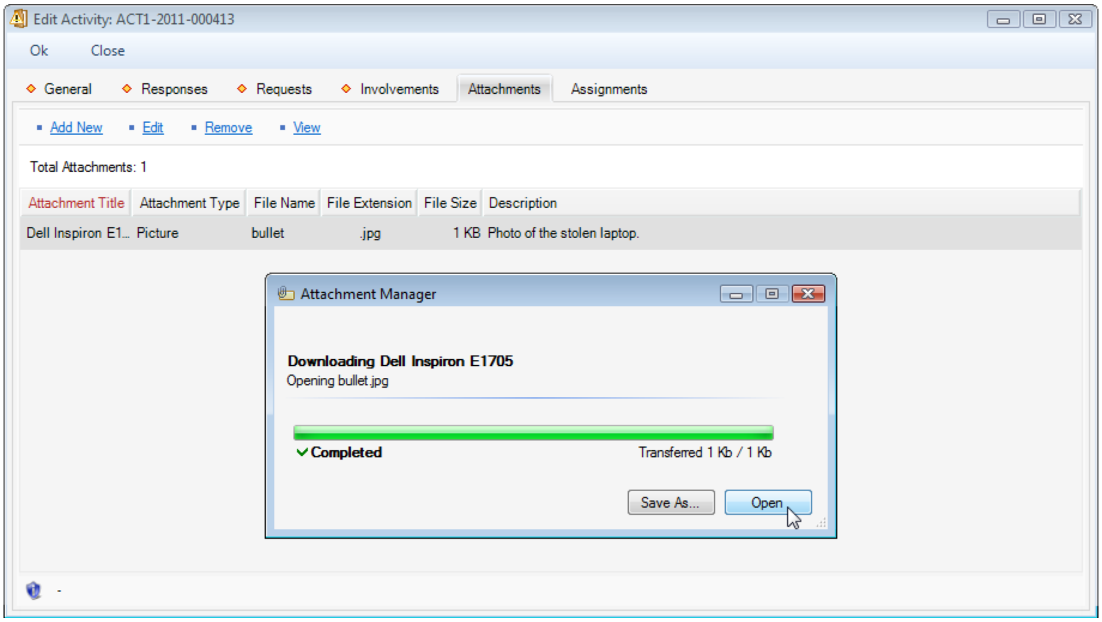
    d. For image files (e.g., .bmp, .gif, .jpg, .png), check the **"Include when Printing?"** box to have a copy of the image included with every print-out of the record.

    e. Click **Remove** to remove any unwanted attachments.

4. Once finished working with attachments, click **OK**.



5. To preview an attachment, ensure the attachment is highlighted in the grid and click **View**. Once the attachment is loaded, click **Open**. The attachment file will open in a separate window. Close the window to return to the record.



Give an Activity-Related Assignment

1. In order to give an activity-related assignment to another user, select the Activity record on the Activities pane and click **Activity Details**.

2. Open the **Assignments** tab and click **Add New**. A pop-up window will open.

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

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

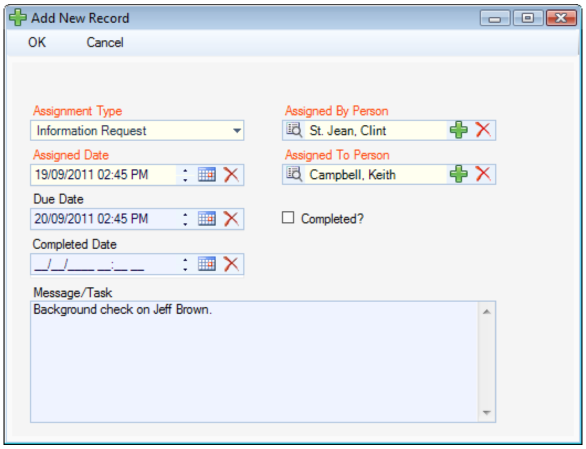
5. Select the user who must complete the assignment from the **Assigned To Person** pick list.

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

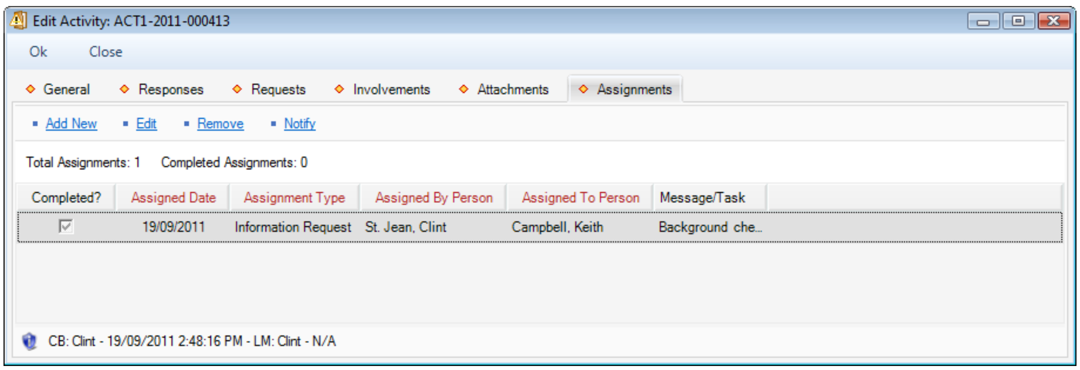
7. When the assignment is finished, check the **"Completed?"** box and enter the appropriate date in the **Completed Date** field.

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

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

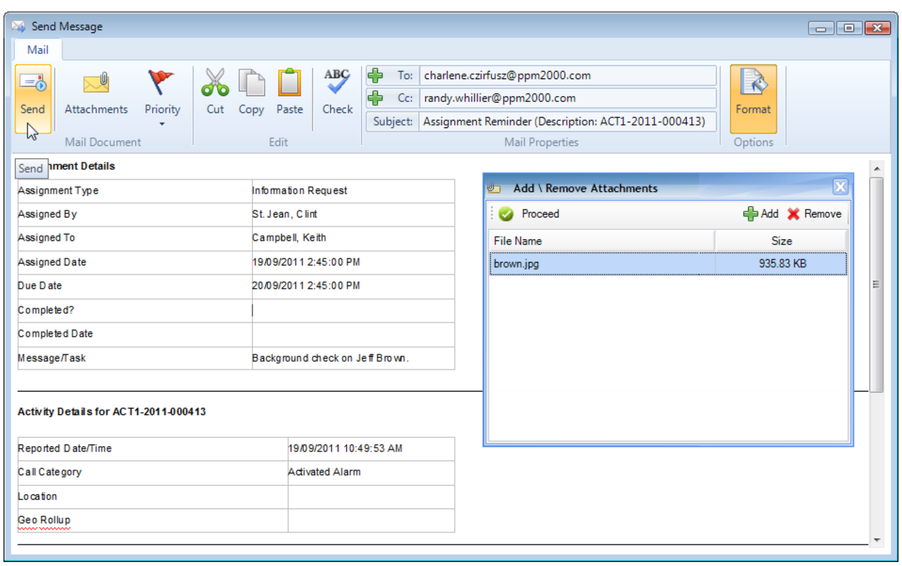


10. Click **OK** on the activity's form to save the changes made to the record.



11. 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.

12. Check the message details, specify the recipients of the message and add any other information that you think is necessary (e.g., attachments). Click **Send**.



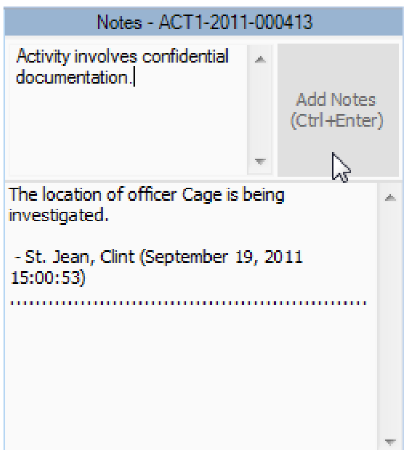
Add Activity Notes

1. Select the Activity record on the Activities pane and click **Activity Notes** on the toolbar. The **Notes** pane will expand to the left of the Activities pane.

2. To enter a brief update to the activity's disposition or status, type the notes in the **Notes** text box and click **Add Notes**.

3. Each note entered under the selected activity will be supplied with a date stamp and the user name of the reporting person.

4. To hide the Notes pane, de-select the Activity Notes icon.



Email a Basic Activity Record

1. To email the basic details of an Activity record, select the record on the Activities pane and click **Mail**. The Send Message screen will appear with the details of the record that have been specified under the General tab. (For details, see "Create a New Basic Activity Record").

2. If required, edit the subject and the text of the original message. If you want to format the message details in plain text rather than the default HTML table, *unclick* the **Format** button. By default, the formatting option is active.

3. Click **Check** to check the spelling of your message.

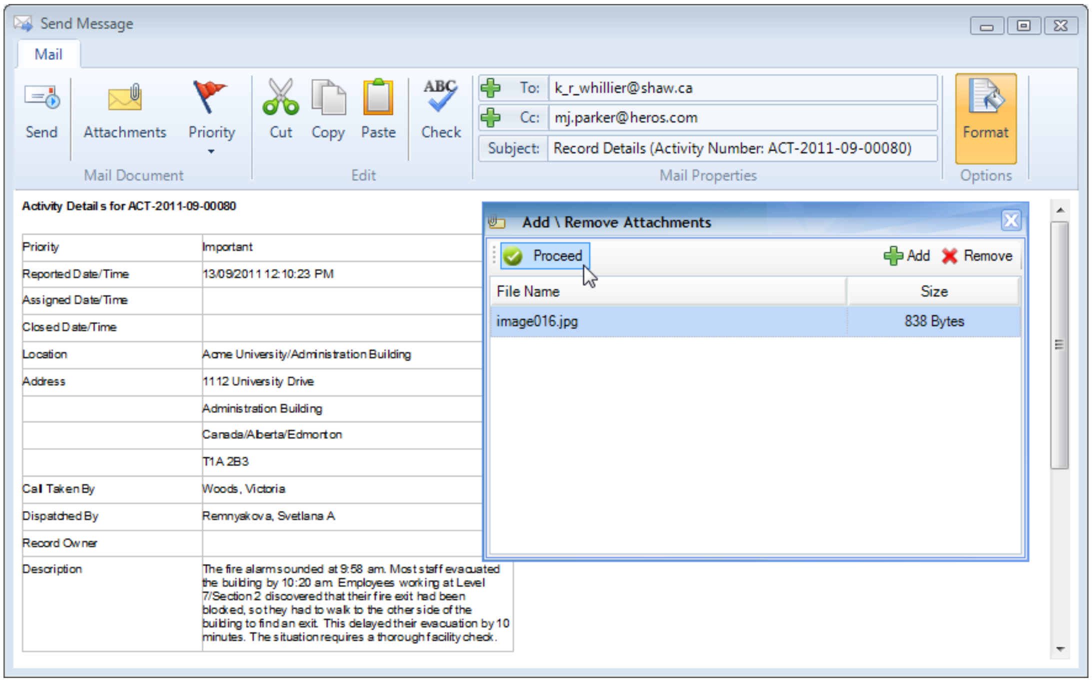
4. To add an attachment to your email, click **Attachments**. A window will appear where you can add attachments by clicking **Add**, selecting the file you need and clicking **Open**. Click **Proceed** to return to the main message screen.

5. Specify the recipients' email addresses. You may type in a recipient's email address directly into the **To** and/or **CC** fields, or import a contact from Perspective's database by clicking To and/or CC and selecting a person from the displayed Entity List. The Entity List will be

populated with user records that contain an email address with the **Primary Email** box checked.

6. To set a priority for the message you are sending, click **Priority** and select from *High*, *Normal* (default) and *Low* priority options.

7. When finished with editing of your email message, click **Send**.



Delete an Activity Record

1. To delete an Activity record from DispatchLog, select it in the Activities pane and press the **<Delete>** key.

2. Click **OK** when prompted to confirm to completely remove the record from the database.

Schedule an Activity

In order 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 in 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 then 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.

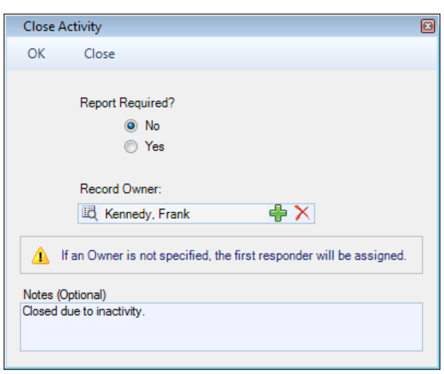
Close an Activity

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 pop up 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.



Activity Statuses and Officer Statuses

The **Activity Statuses** Lookup, used in Activity and DispatchLog tasks, warrants special mention, as it behaves differently than its name may suggest. In effect, these statuses apply to both activities and officers, as in DispatchLog an Activity's status is usually determine by the status of the Officer(s) currently assigned to it.

The relationship between Activity Statuses and Officer Statuses

Adding new values to the Activity Statuses Lookup list doesn't strictly add statuses to activities as the name may suggest; these statuses are also tied directly to Officer Statuses.

Refer to **System values** below for a list of Activity Statuses already in the Perspective system.

Note: System Values cannot be deleted, though they can be renamed on a per-language basis.

Additional values added to this Lookup, due to the nature of how Activity and Officer Statuses relate, become new Officer Statuses. For example, if the custom value "On Lunch Break" is added, this status applies only to Officers and not Activities.

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.
- **Waiting**: Applies to Activities and denotes a new Activity awaiting an Officer assignment.

Dispatch Activities

Bring an Officer On Duty

1. Click **On Duty** on the toolbar. A pop-up window will appear.

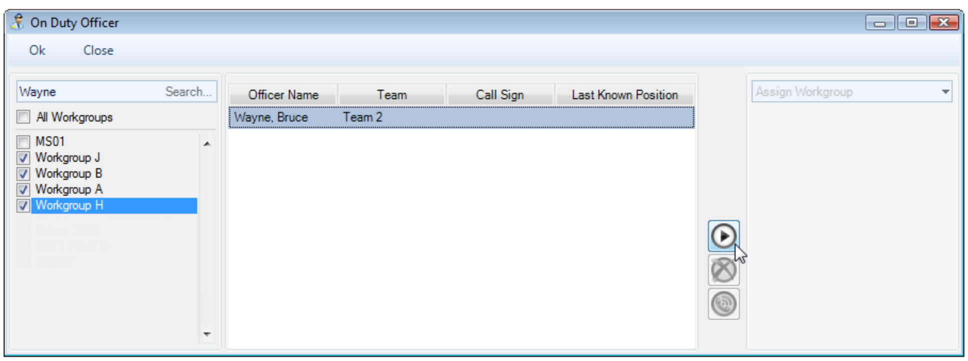
2. Enter the name of the officer you would like to bring on duty in the **Search** field. To display all available officers, leave the Search field blank.

3. Restrict your search by selecting the specific workgroup(s) the officer is associated with. Otherwise, check **All Workgroups** to search the whole database.

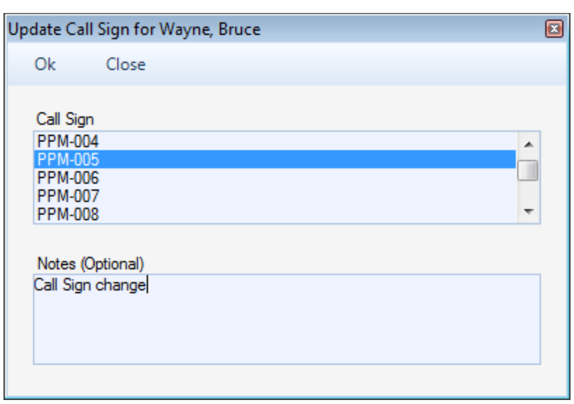
4. Click **Search**. The middle pane will display a list of officers that correspond to the criteria.

5. Select the officer you wish to bring on duty from the list in the middle pane.

6. Click the arrow button to transfer the selected Officer record to the on-duty list displayed on the right pane of the window. At the same time, the Available pane on the main DispatchLog window will update with the new Officer record, too. The status of the officer who has been newly brought on duty will be set to *Available*. A pop-up window will appear suggesting to update the officer's Call Sign.



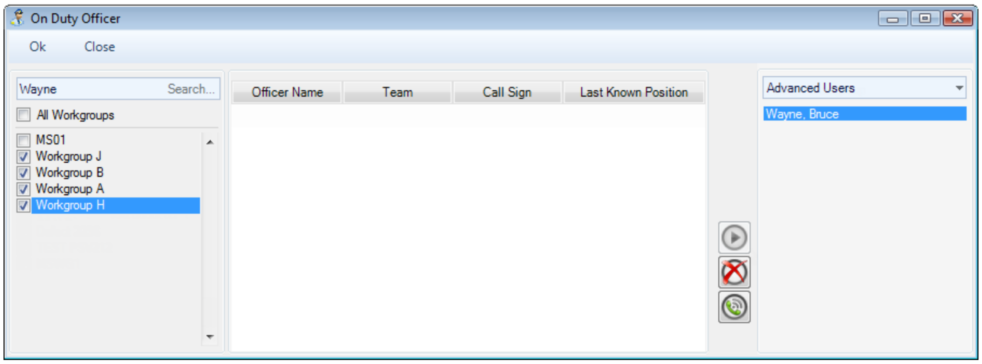
7. Select the required officer's **Call Sign** from the list and enter the appropriate **Notes**. Click **OK** to complete the operation.



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

9. 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.

10. Click **OK** to return to the main DispatchLog window.

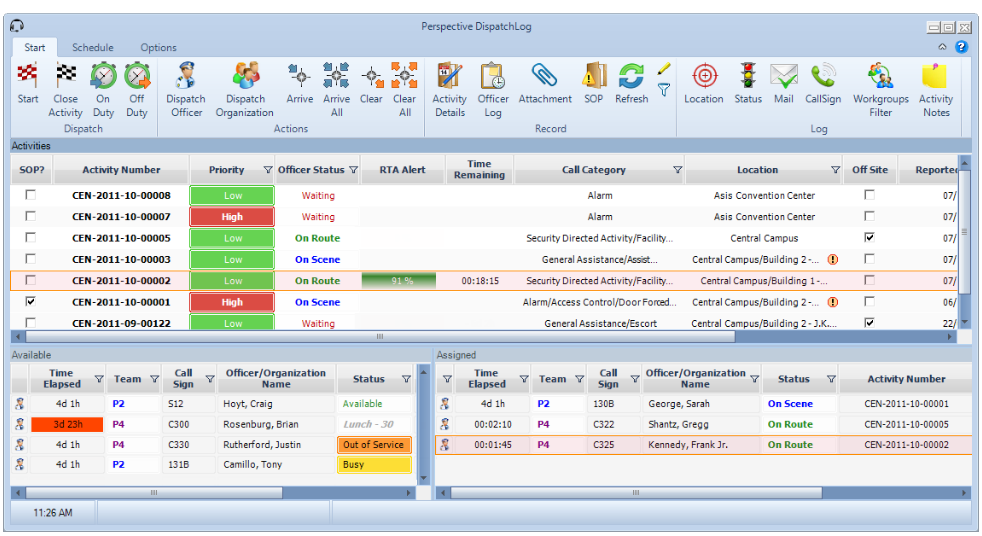


Dispatch an Officer for an Activity

1. Select an Activity record from the Activities pane.

2. On the Available pane, select an officer that you want to dispatch for the selected activity and click **Dispatch Officer** on the toolbar. Alternatively, drag the Officer record from the Available pane to the Activity record.

3. The Officer record will move from the Available pane to the Assigned pane and will be supplied with the relevant dispatch **Activity Number**. The **Time Elapsed** cell on the Assigned pane will start counting the time the officer has been registered in the *On Route* status. The Activity record will also be updated with the dispatched **Officer Status**.



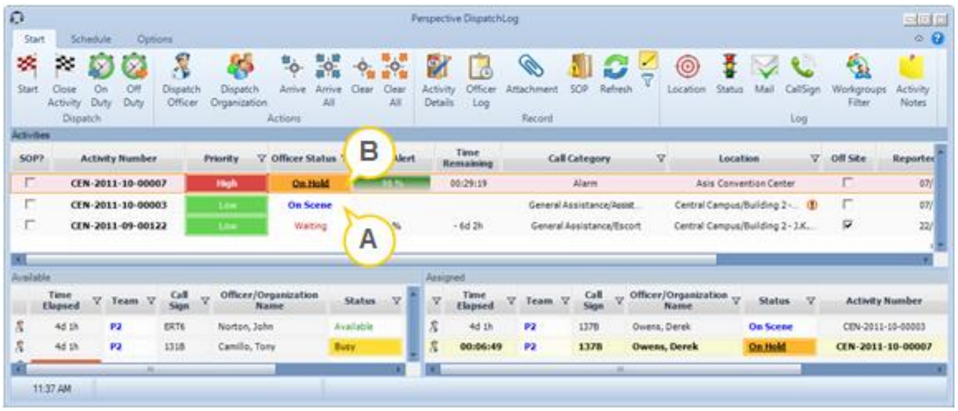
Dispatch an Officer for Multiple Activities

If you need to dispatch an officer that is currently involved in an activity (Activity A) for their next activity (Activity B), follow the steps described below:

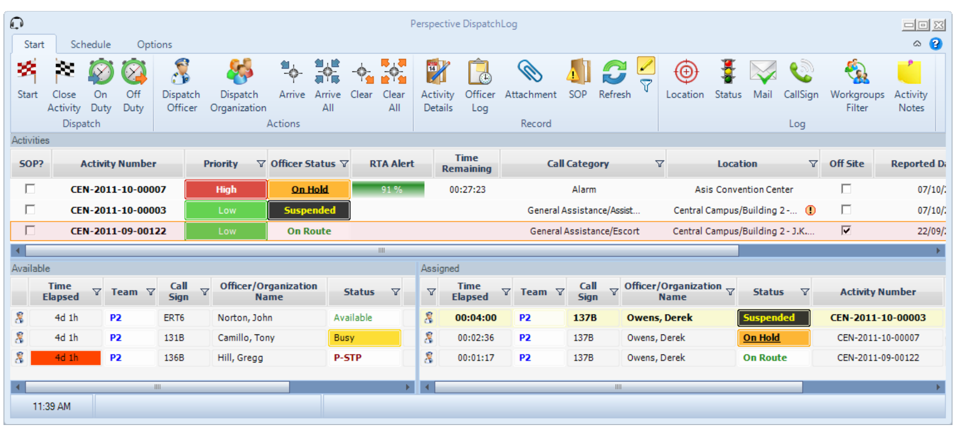
1. Drag the Officer record from the Assigned pane to the Activity B entry on the Activities pane.

2. If the officer is *On Route* or *On Scene* with Activity A, a dialog box will be displayed where you will have to decide between the following options:

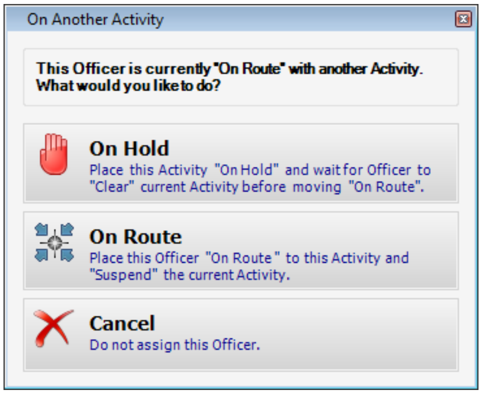
   - ***On Hold***: Wait for the officer to be cleared of Activity A before moving *On Route* with Activity B and temporarily place Activity B *On Hold*. In this case, a second record for the same officer will be created for Activity B in the Assigned pane with the *On Hold* status. When the officer is cleared from Activity A, the Officer record for Activity A will disappear from the Assigned pane and the Activity B Officer record will be automatically transferred to *On Route*.



   - ***On Route***: Suspend the officer's involvement with Activity A and place them *On Route* for Activity B. In this case, the Activity A Officer record will be transferred to the *Suspended* status and a double record for the same officer for Activity B will be created with the *On Route* status. When the officer is cleared from Activity B, the Officer record for Activity B will disappear from the Assigned pane and the Activity A Officer record will be automatically transferred to *On Route*.



- ***Cancel***: Cancel the dispatch action and leave the officer's involvements unchanged.



3. Following the patterns and status modification principles described above you may dispatch one officer for as many consecutive activities as necessary. Note that the Activity record only captures the status of the Organization record that was dispatched last.

Dispatch an Organization for an Activity

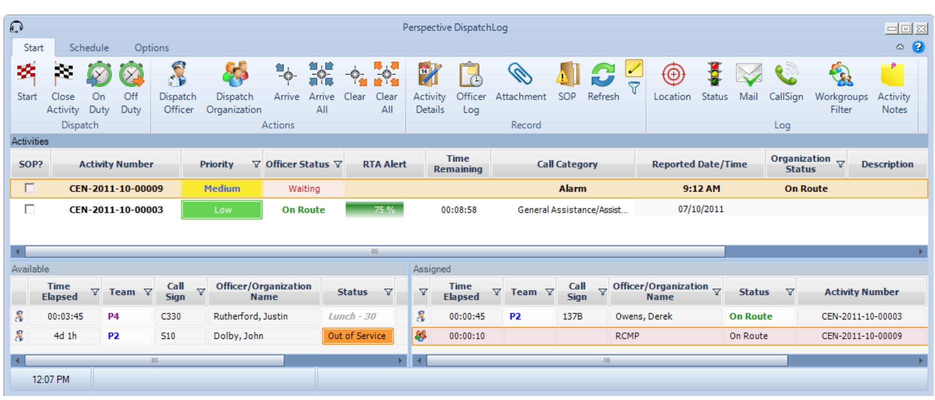
1. Select an Activity record from the Activities pane.

2. Click **Dispatch Organization** on the toolbar. An Entity List window will appear.

3. Click the green arrow icon to display all the Organization records available in Perspective's database, or enter the name of the organization in the search field and click the checkmark icon to display just the Organization records that correspond to the search word entered. Alternatively, if the entity you are looking for does not have an existing record, you may use the pick list's **Quick Add** function to create one.

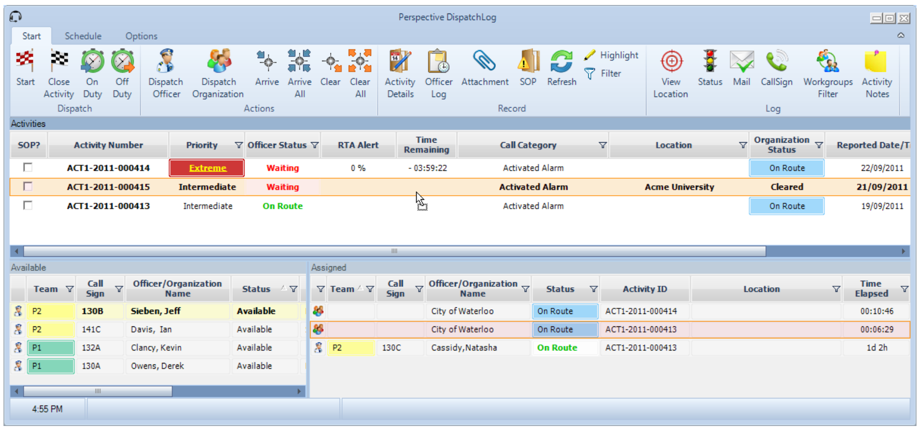
4. Select the Organization record you want to dispatch for the activity and click **Select**.

5. The dispatched Organization record will be added to the Assigned pane supplied with the relevant dispatch **Activity Number**. The **Time Elapsed** cell in the Assigned pane will start counting the time the organization has been registered in the *On Route* status. The Activity record will also be updated with the dispatched organization's status.



Dispatch an Organization for Multiple Activities

If you need to dispatch an organization that is currently involved in an activity (Activity A) for their next activity (Activity B), simply 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 that the Activity record only captures the status of the Organization that was dispatched last.



Update an Officer's/Organization's Status

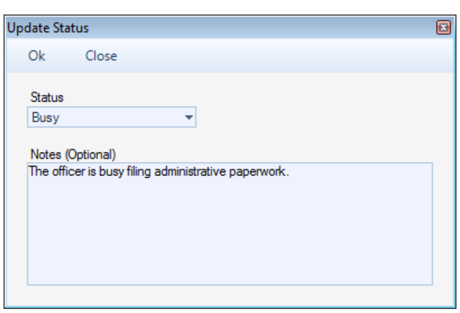
1. Select an Officer/Organization record from either the Available or the Assigned pane. Note that "Suspended" and "On Hold" records cannot undergo a status change.

2. Click the **Status** icon on the toolbar. An Update Status form will pop up.

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 reflect in the entity's entry on the Assigned pane.



You may allocate some statuses with the help of special toolbar icons. For instance, you may update an officer's/organization's status to **"On Scene"** by selecting their entry on the Assigned pane and clicking the **Arrive** icon on the toolbar. Note that you may only "arrive" officers/organizations if their current status is "On Route".

To "arrive" all "On Scene" officers and organizations dispatched for a specific activity, select the Activity record on the Activities pane and click the **Arrive All** icon on the toolbar.

View or Update an Officer's/Organization's Location

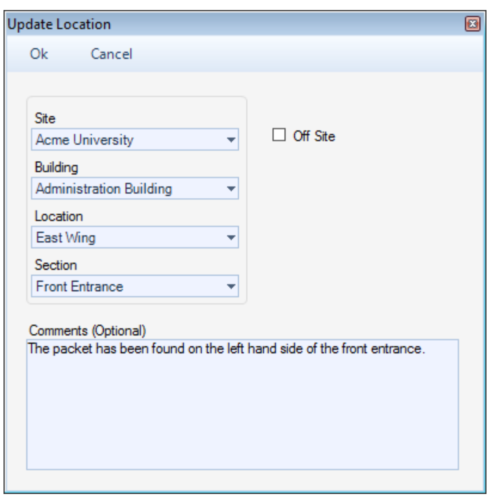
1. Select an Officer/Organization record from either the Available or the Assigned pane.

2. Click the **Location** icon on the toolbar. An Update Location form will pop up displaying the current officer's/organization's location.

3. Select the new location specifications from the **Site**, **Building**, **Location** and **Section** lookups. If the new location is off-site, check the **Off Site** box.

4. Optionally, enter a short explanation of the location change or a description of the particular location under **Notes**.

5. To confirm the change, click the **OK** button. The corresponding record will update with the new information.



Update an Officer's Call Sign

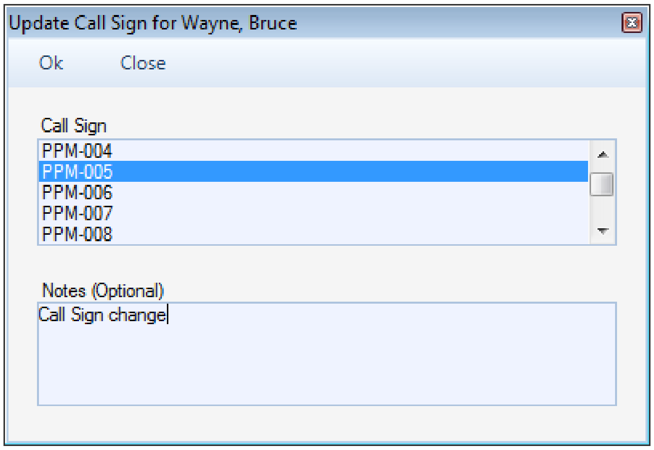
1. Select an Officer record from either the Available or the Assigned pane.

2. Click the **Call Sign** icon on the toolbar. An Update Call Sign form will pop up.

3. Select the new **Call Sign** for the selected officer from the list of the available abbreviations.

4. Optionally, enter a short explanation of the call sign change under **Notes**.

5. To confirm the change, click the **OK** button. The corresponding record will update with the new information.



Clear an Officer/Organization from an Activity

1. To clear an officer/organization from an activity when their involvement with the activity is complete, first, select the Officer/Organization record on the Assigned pane. Note that only "On Scene" records can be cleared.

2. Click the **Clear** icon on the toolbar. The cleared officer/organization will be placed back to the Available pane. The Activity record will update its corresponding officer/organization status to "Cleared" only if there are no other officers/organizations that have not been cleared from the activity yet.

3. To clear all "On Scene" officers and organizations dispatched for a specific activity, select the Activity record on the Activities pane and click the **Clear All** icon on the toolbar.

Bring an Officer Off Duty

1. Select an officer you wish to bring off duty on the Available pane.

2. Click **Off Duty** on the toolbar.

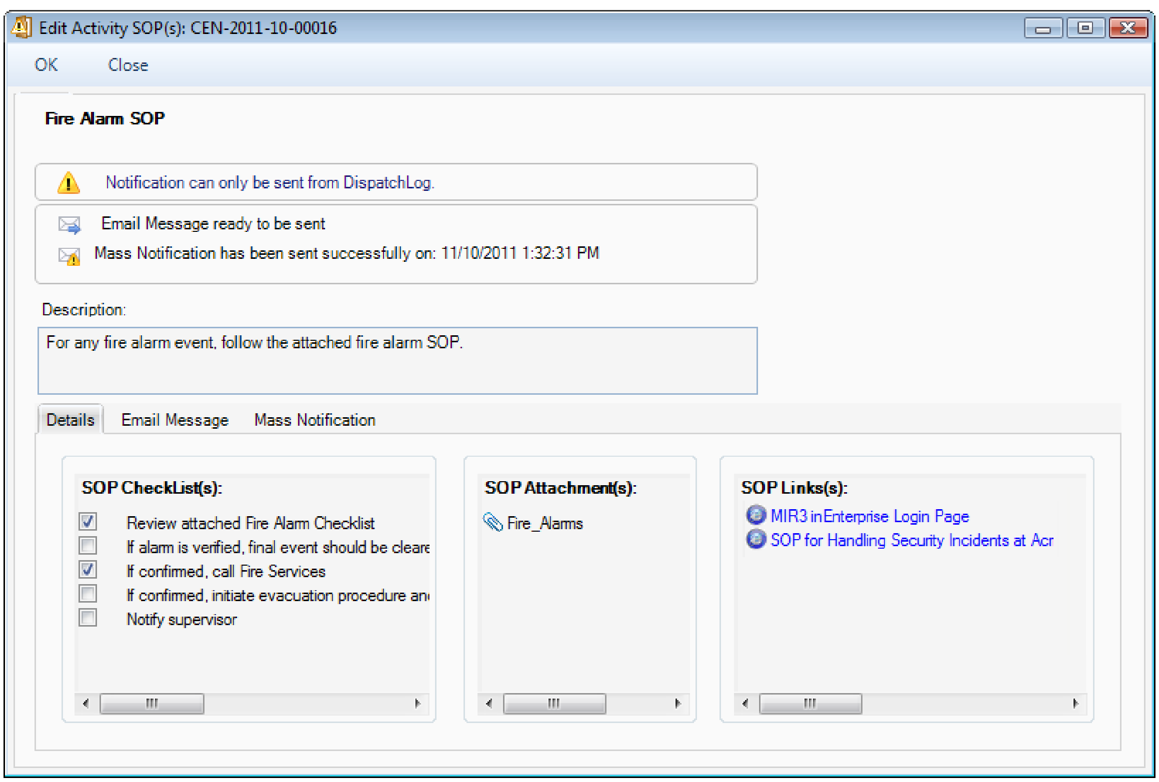
3. In the confirmation pop-up window, click **Yes**, if you are sure that you wish to take the selected officer off duty. The officer will be removed from the Available pane.

Additional Organizational Functions

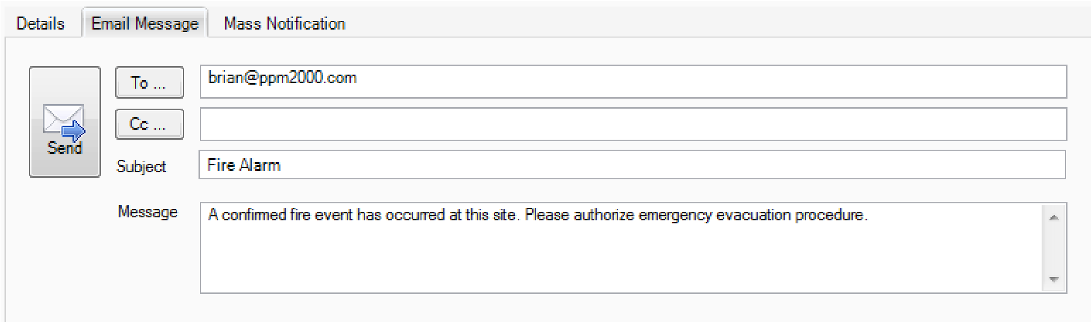
Review Activity's Standard Operating Procedures

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 pop up automatically for you to track or edit the completion of the procedures immediately. However, if you wish to review the procedures at any other time, you can do so manually. For the SOP option to be active for an activity, the **SOP** box for the Activity record must be checked on the Activities pane.

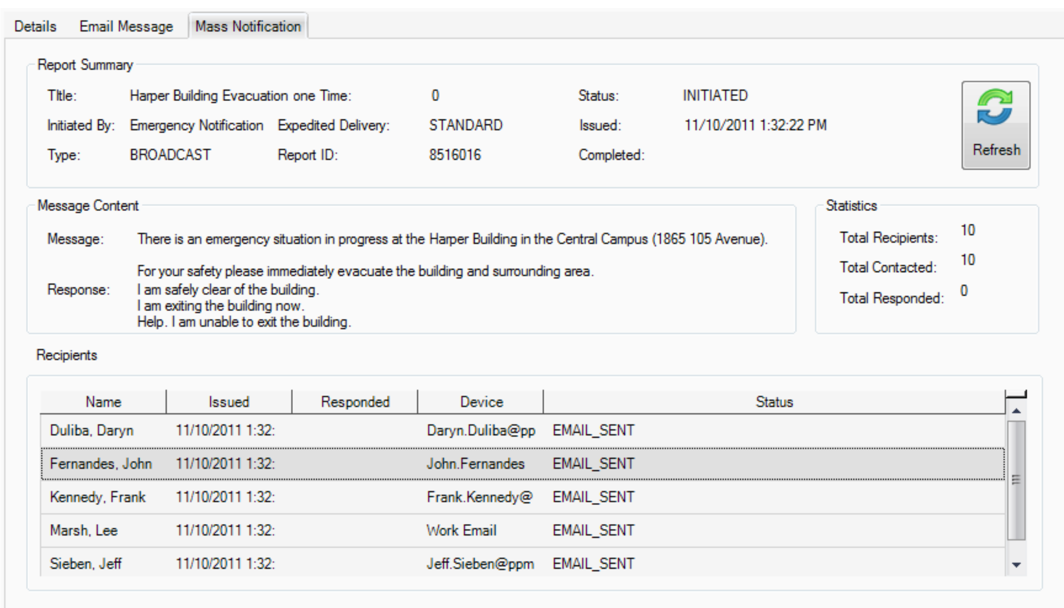
1. To review an activity's Standard Operating Procedures, edit the SOP Checklist and/or send out individual email or mass notifications containing the activity's details, click **SOP** on the toolbar. The Edit Activity SOP(s) window will pop up with the selected activity's Description. If notifications have been sent for the activity, the form will contain notes with the dates of the last activity notifications.
2. Check off the SOP procedures that have been completed under **SOP Checklist(s)**.
3. View the **SOP Attachment(s)** by double-clicking on the relevant attachment names.
4. Click on the individual **SOP Link(s)** to open the related network locations, files or Web links.



5. If no email notification has been sent yet, you can send individual email notifications from the **Email Message** tab. Specify **To** and/or **Cc** recipients of the notification, edit the **Subject** of the notification and the standard notification **Message**, and click **Send**. The form will capture the date and time the notification was sent.



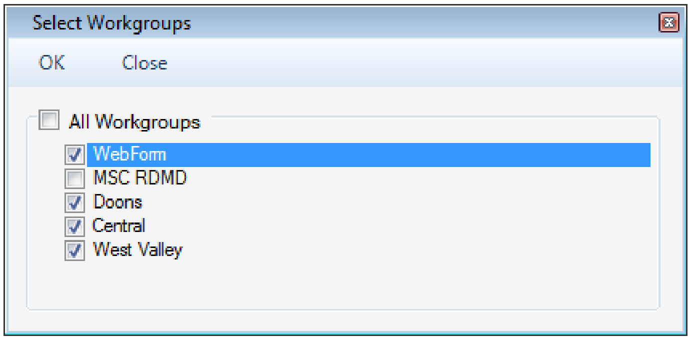
6. If no mass notification has been sent yet, you can send a mass notification from the **MIR3** tab using the MIR3℠ inEnterprise™ mass notification tool. Review the details of the mass notification and click **Send**. Each mass notification activity will be recorded under the **Recipients** table. The form will capture the date and time the mass notification was sent, as well as the total number of recipients and contacted and responded individuals. To refresh the common database of notifications for the selected activity, click **Refresh**.



7. To save the changes made to the SOP form, click **OK**.

Display Activities Filtered by a Workgroup

By default, the Activities pane displays Activity records for all workgroups. To filter the records for specific groups only, click the **Workgroups Filter** icon on the toolbar and select just the workgroups for which you wish to display the activities. Click **OK** to confirm your choice.

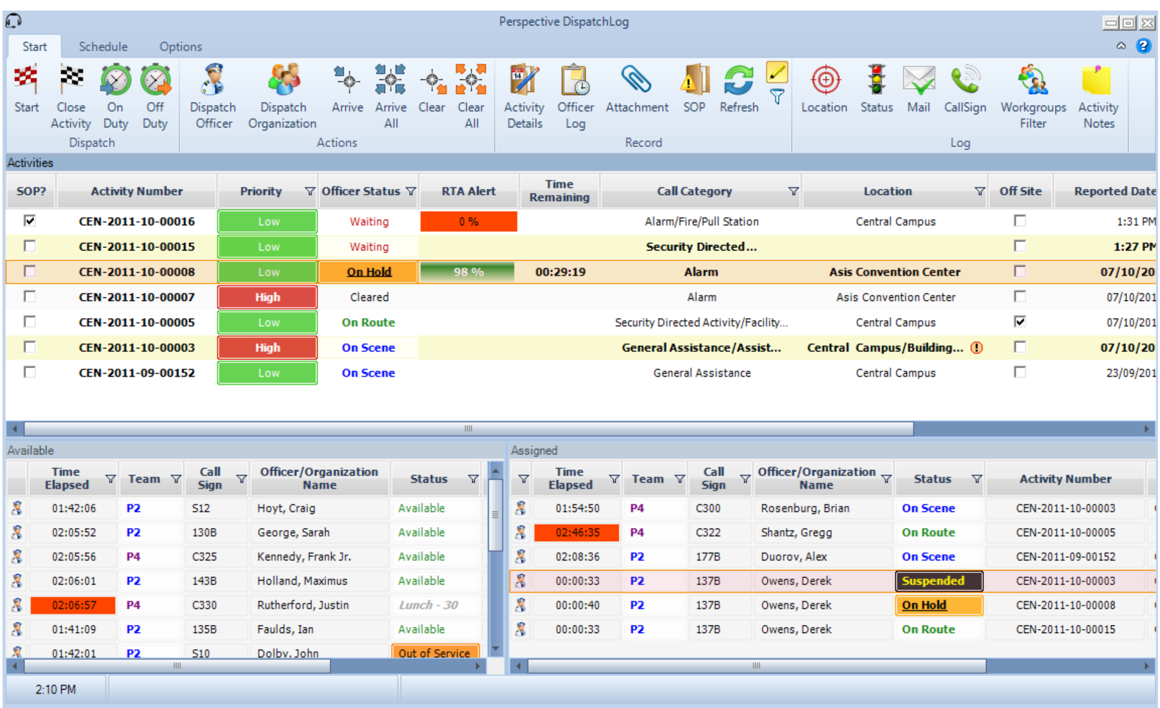


Highlight Dispatched Officers/Organizations for Activities and Vice Versa

1. To review the officers/organizations assigned to a specific activity, select the corresponding Activity record on the Activities pane and click the **Highlight** icon. All the dispatched officers/organizations that are related to the selected activity will be highlighted on the Assigned pane.

2. To review the activities assigned to a specific officer/organization, select the corresponding Officer/Organization record on the Assigned pane and click the **Highlight** icon. All the activities that are related to the selected officer/organization will be highlighted on the Activities pane.

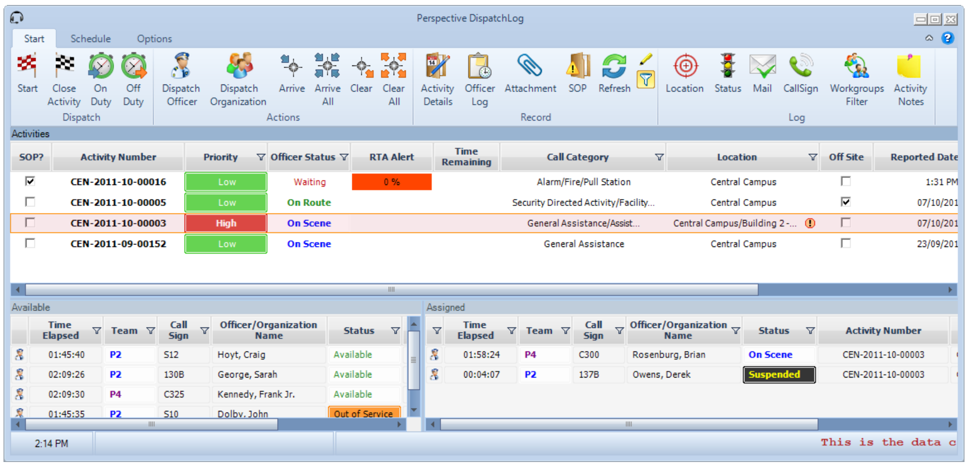
3. To cancel the highlight, de-select the Highlight icon.



Filter all Dispatched Officers/Organizations for One Activity

1. To display a list of officers/organizations assigned to a specific activity only, select the corresponding Activity record on the Activities pane and click the **Filter** icon. Only the dispatched officers/organizations that are related to the selected activity will be displayed in the Assigned pane.

2. To cancel the filter, de-select the Filter icon.



View a Complete Officer Log

1. To view a complete log of activities recorded for a specific officer in the DispatchLog database, select an officer from one of the DispatchLog panes and click the **Officer Log** icon on the toolbar.

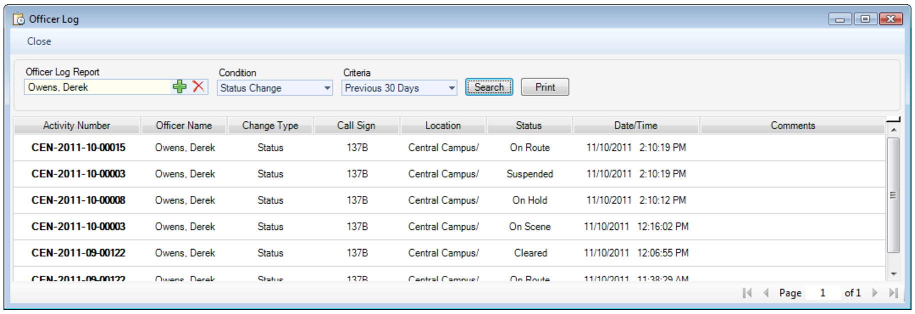
2. If you do not select a specific officer, you will have to specify the officer in the **Officer Log Report** field by clicking the Add icon. From the Entity List, select the officer for which you would like to view the activity log.

3. 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.

4. To view the log records that correspond to a particular time period, select the desired time label from the **Criteria** lookup.

5. Click **Search**. The viewing pane populates 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, etc.), call sign, location, status, time, and may/may not have a note that explains the record's change.

6. Click **Print** to print the displayed officer log.



Clone Activities and Resources

The functions of cloning activities and resources have been designed to help the dispatcher in viewing large volumes of data. “Cloning” in the case of a pane included in the DispatchLog interface means displaying the pane in a separate window for convenient filtering, highlighting and further manipulation. Note that cloning activities or resources means displaying both scheduled and current activities, and both assigned and available officers and organizations in the same list.

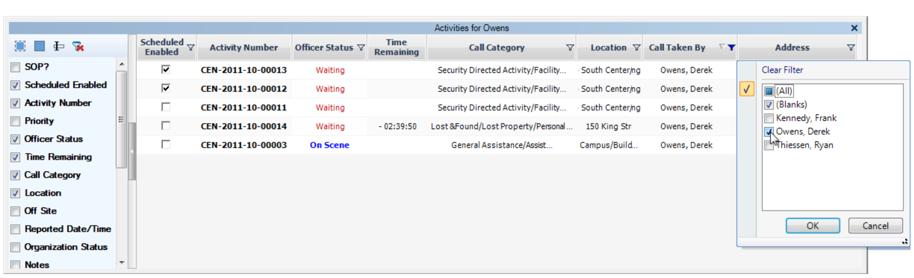
- To clone activities, click **Clone Activities** . The details of the Activity records cloned in the separate pane will include the following: the *SOP?*, *Off Site* and *Scheduled Enabled* (checked, if the activity is a scheduled activity) checkboxes, *Activity Number*, *Priority*, the last *Officer* and *Organization Statuses*, *Time Remaining*, *Call Category*, *Location*, *Reported Date/Time*, *Notes*, *Description*, *Call Taken By*, *Call Source*, *Address*, *Postal Code*, *Site Notes*, *Initiated By*, *Dispatched By*, and *Contact Number*.

- To clone resources, click **Clone Resources** . The details of the Officer and Organization records cloned in the separate pane will include the following: *Entity Type* (Officer/Organization), *Team*, *Call Sign*, *Officer/Organization Name*, *Status*, *Activity Number*, *Location*, *Start Date/Time*, *Arrived Date/Time*, *Assigned Date/Time*, and *Notes*.

- You may filter, sort and dock the cloned panes into the DispatchLog screen together with the rest of the panes under the Start or the Schedule tab.

- To display less of the details in a cloned pane, click the vertical grey arrow button located to the left of the pane. Here you may select specific columns for display, select or deselect all of them, rename the pane or cancel the filters previously applied to columns.

- To reset o the default view, click the **Reset View** icon  on the DispatchLog toolbar.



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 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.

Note that this document is only applicable to organizations that have purchased Perspective Visual Analysis. If you are not certain if your Perspective system includes Visual Analysis, please, contact Customer Service for verification.

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 either:

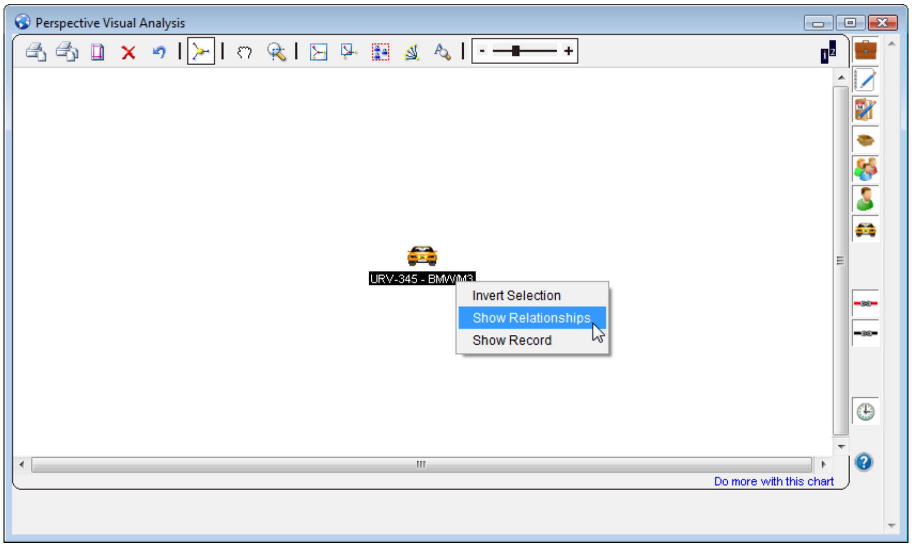
- Short link:
  http://ibm.co/W8rK1l.
- Long link:
  http://www14.software.ibm.com/webapp/download/nochargesearch.jsp?S_TACT=&S_CMP=&s=&k=ALL&pid=&q=Chart+Reader+&ibm-search=Search&pf=&b=&q0=.

Access Perspective Visual Analysis

1. Log on to Perspective.
2. In the Navigation pane, open the **Data Forms** component and choose the record entity that you wish to view (i.e., Activities, Incidents, Cases, Items, Persons, Organizations or Vehicles).
3. 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 wish to build your link chart from.
5. Click the **Visual Analysis** icon on the Ribbon. A separate window for Perspective Visual Analysis will open with the selected record displayed as an icon in the center.

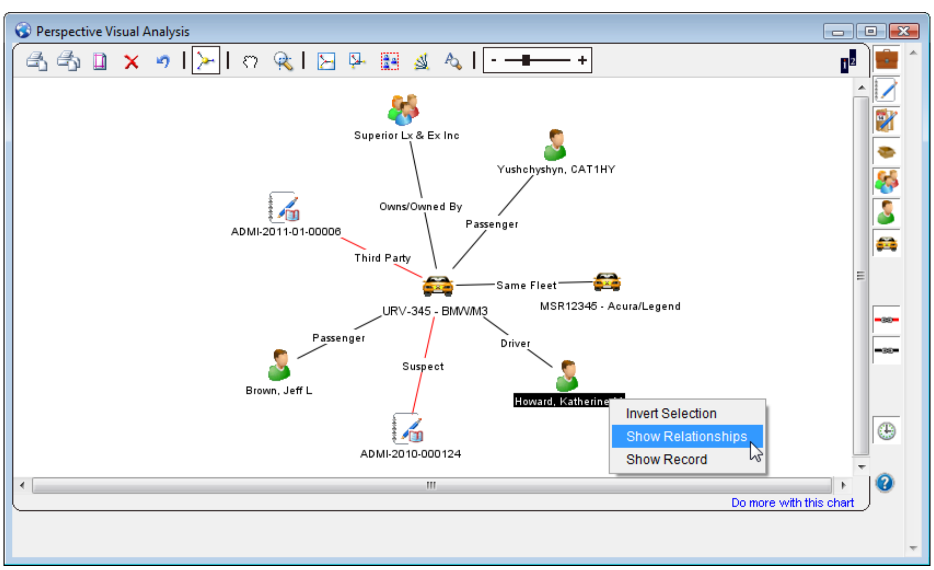
Create a Link Chart

1. Right-click the icon in the center of the Visual Analysis window, and select **Show Relationships**.



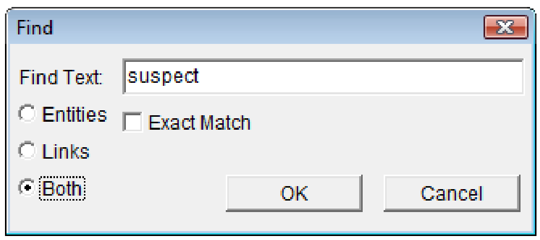
2. A link chart of related records will appear in the window, with the original record at the center. Right-click any icon in the link chart, and then select one of the options:

- **Invert Selection**: Selects all records except the current one.
- **Show Relationships**: Displays all Incident, Case, Item, Person, Organization or Vehicle records linked to the selected record.
- **Show Record**: Opens the selected record in Perspective. (The Visual Analysis window may still be open in the foreground; in this case, minimize the Visual Analysis window to view the record in Perspective.)



3. Click on the **top toolbar** options to customize the appearance of your chart for clear visual analysis, or to find, select or remove a particular record from your chart:

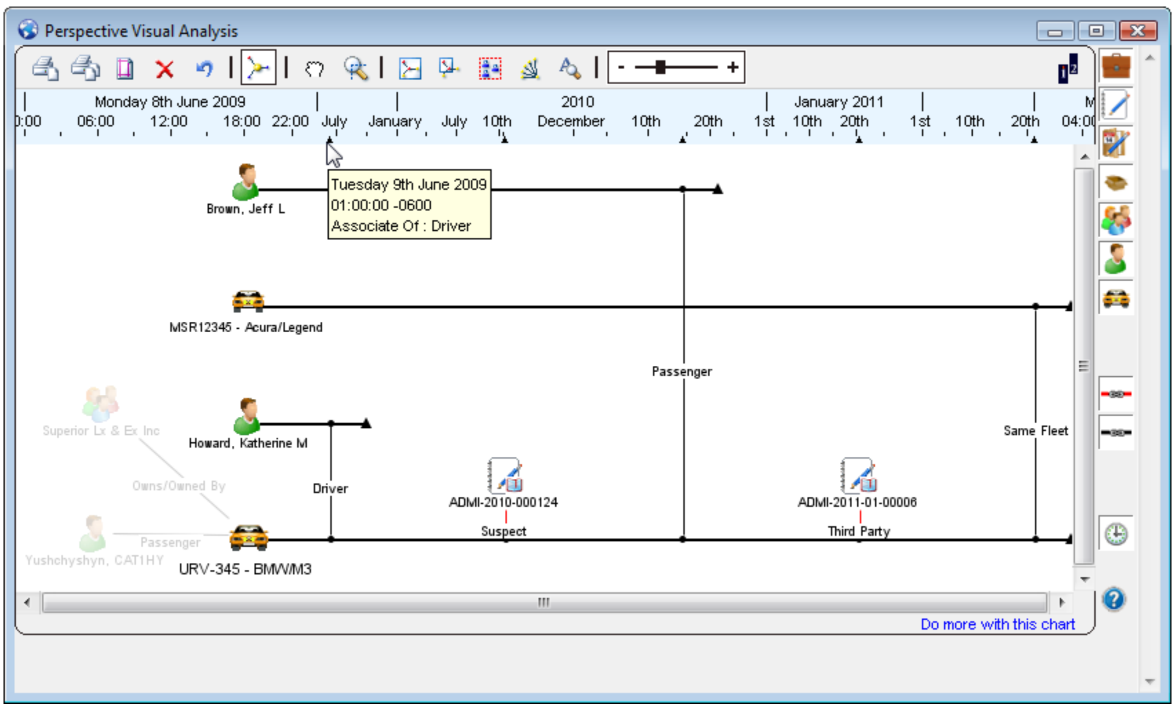
Print on Single Page	Prints all details of your chart on a single page.
Print at 100% Scale	Prints your chart at 100% scale, which would usually occupy more than one page.
Page Setup	Enables you to adjust margins and page setup settings before printing.
Delete Selection	Removes the highlighted record(s) from the chart.
Undo Delete	Brings back the record(s) that were just deleted.
Key Entity Emphasis	Enlarges the central records in your link chart placing focus back on them. Click again to restore the central records to regular size.
Panning Tool	Enables dragging of the entire link chart allowing you to quickly view different areas of the chart.
Zoom to Area	Click the Zoom to Area button, and then click and drag on the chart to select an area with the help of the mobile zoom box. The window will fill with an enlarged display of the selected area.
Fit to Window	Fits the entire link chart in the window, making it easier to see the overall shape and the number of connections in the chart.
Fit Selection to Window	Click and drag on the chart to select an area of interest with the help of a box. Alternatively, select multiple records holding down the Ctrl key while clicking the record icons. Then, click the Fit Selection to Window button. The window will fill with all records that are currently selected in the link chart.
Select All	Selects all the records in the link chart.
Reorganize	Changes the arrangement of the record icons restoring the link chart to its original layout.

Find	Searches for a chart entity and/or link that contains a particular string of text. The Find function only searches the text displayed in the window; it does not search actual records. Once you click the Find button, the Find dialog will pop up. a. Type the search text in the **Find Text** field. b. Choose to search **Entities** (e.g., incident numbers, person names, license plate numbers, etc.), **Links** (e.g., suspects, associates, subjects of interest, etc.) or **Both**. c. Select **Exact Match** to only search for text that matches the search string precisely. d. To execute your search, click **OK**. The window will select and zoom in on any entities and/or links matching your search criteria. 
Zoom	Click and drag the slider back and forth to zoom the window in and out.

4. Click the buttons on the **right toolbar** to hide particular entities from your link chart. By default, these entities are displayed in your link chart. Click again to restore the original link chart layout and/or to re-display the entities.

Case	Hides cases from your link chart.
Incident	Hides incidents from your link chart.
Activity	Hides activities from your link chart.
Item	Hides items from your link chart.
Organization	Hides organizations from your link chart.
Person	Hides persons from your link chart.
Vehicle	Hides vehicles from your link chart.
Involvements	Hides involvements from your link chart. Involvements, represented by red connecting lines, show that an item, organization, person or vehicle was involved in a particular incident (e.g., Suspect,

		Responding Service, Indirectly Involved, etc.).
	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., etc.).
	Timeline	Transfers your link chart into the timeline mode (see the image below). All entities and links will be reorganized sequentially, allowing for time series analysis.



Use IBM i2 ChartReader to Manipulate Your Link Chart

After using Perspective Visual Analysis to build and develop your link chart, customizing its appearance to suit your needs, you can use IBM i2 ChartReader to share your chart with other people in your organization, or at the very least, to save or print your chart for access at a later date.

If ChartReader is not already installed on your computer, you can download the product from the IBM i2 website:

- Short link:
  http://ibm.co/W8rK1l.
- Long link:
  http://www14.software.ibm.com/webapp/download/nochargesearch.jsp?S_TACT=&S_CMP=&s=&k=ALL&pid=&q=Chart+Reader+&ibm-search=Search&pf=&b=&q0=.

ChartReader offers many of the same navigation functions as Visual Analysis, allowing you to zoom in and out on particular areas of your chart, re-size 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 certainly cannot access any of your Perspective data to supplement your chart.

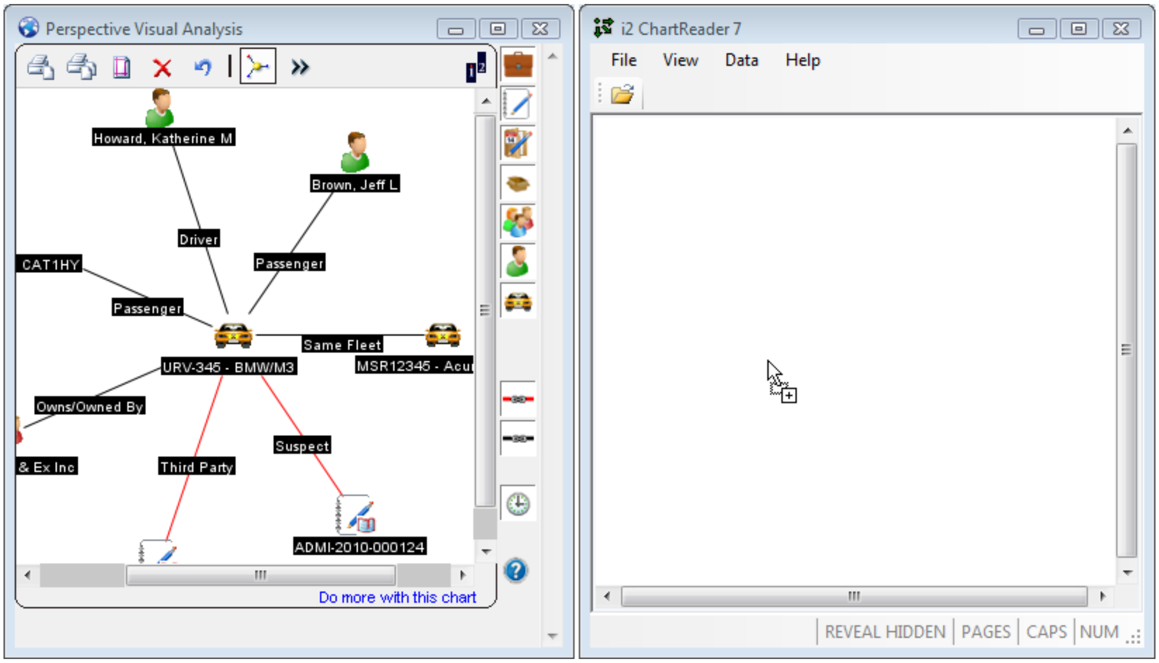
Ensure that your chart is complete when you transfer it into ChartReader, and then simply use ChartReader to:

- 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.

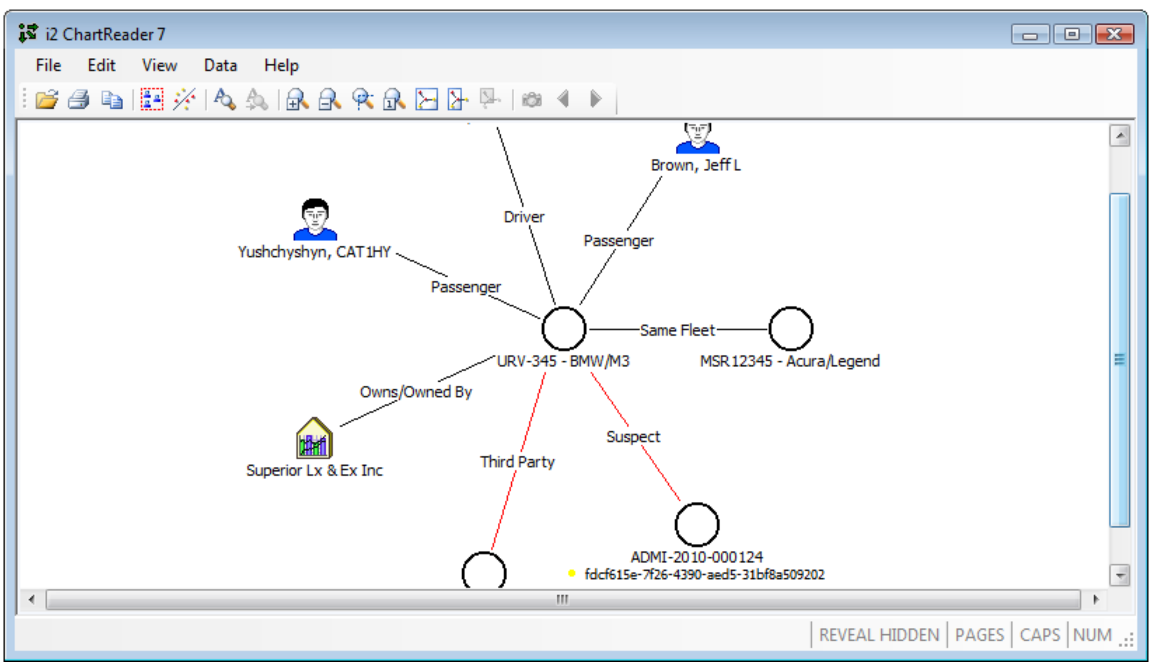
In other words, use Perspective Visual Analysis to create and develop your visual research, and then employ ChartReader to document it and distribute it to others.

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:

- Short link:
  http://ibm.co/W8rK1l.
- Long link:
  http://www14.software.ibm.com/webapp/download/nochargesearch.jsp?S_TACT=&S_CMP=&s=&k=ALL&pid=&q=Chart+Reader+&ibm-search=Search&pf=&b=&q0=.

Contact Information

Technical Support

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

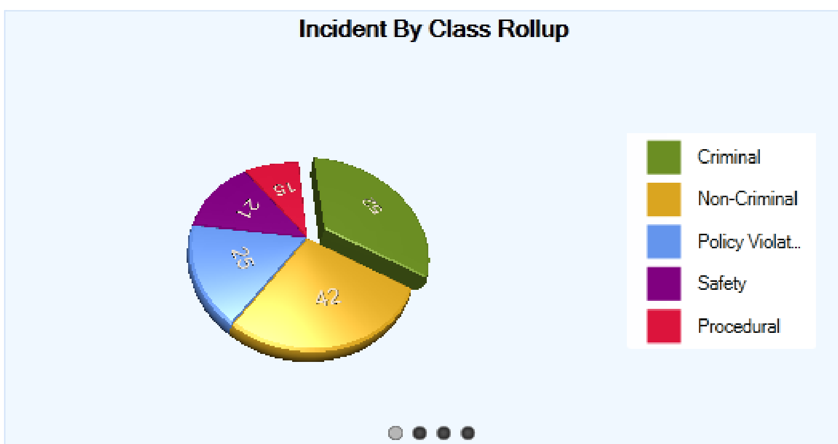
PPM 2000

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

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.

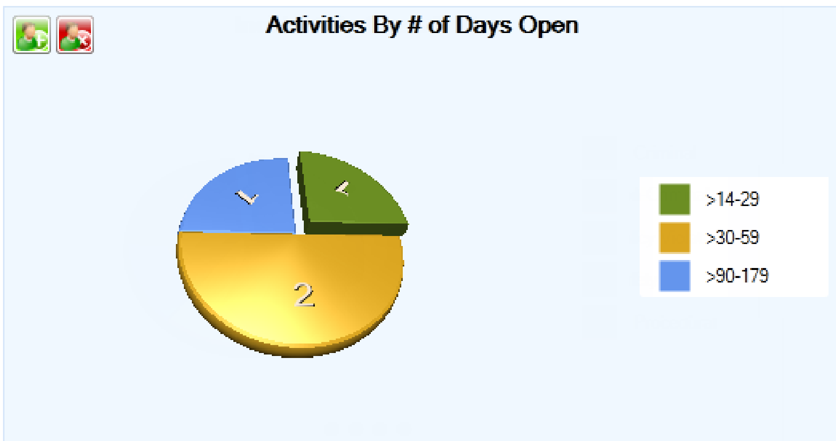
Incident by Class	Displays the number of incidents by the specified number of incident classes (e.g., Criminal, Procedural, Policy Violation, etc.) that have taken place during the specified period of time.
Incident by Business Unit	Displays the number of incidents by the specified number of business units (e.g., North America, Europe, Asia, etc.) 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, etc) 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, etc.) 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, etc.).
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.

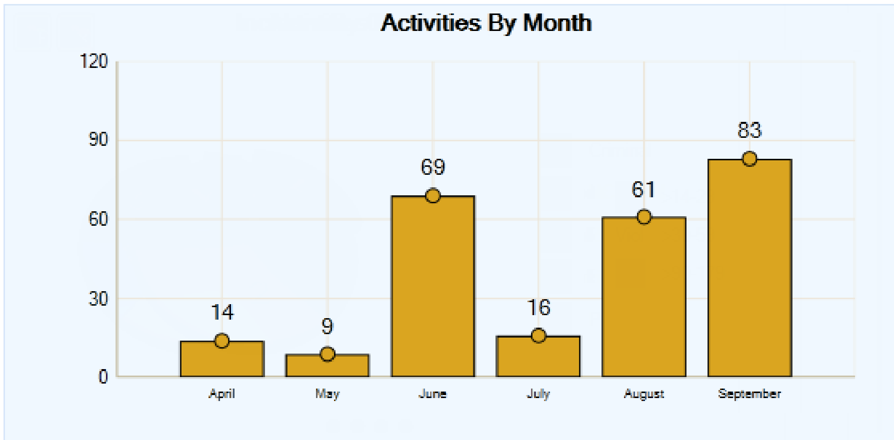
Incidents by Number of Days Open	Displays the number of incidents with an "Open" status arranged by the set periods of time for which the Incident records have been open.
Investigations by Number of Days Open	Displays the number of investigations without a Closed Date/Time arranged by the set periods 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 or Incident data for a Case Investigator/Case Manager/Case Supervisor, the Investigation data for an Investigator, click on the plus icon in the chart section and select the required user from the entity list. To reset the filter and show the data that applies to all users in the system, click the x icon.



Activities by Month	Displays the number of the specified portion of activities that have been recorded in each of the twelve months of the selected year. If no data has been recorded for a specific month, it will be absent from the chart.
Incidents by Month	Displays the number of the specified portion of incidents that have been recorded in each of the twelve months of the selected year. If no data has been recorded for a specific month, it will be absent from the chart.
Investigations by Month	Displays the number of the specified portion of investigations that have been recorded in each of the twelve months of the selected year. If no data has been recorded for a specific month, it will be absent from the chart.

Cases by Month	Displays the number of the specified portion of cases that have been recorded in each of the twelve months of the selected year. If no data has been recorded for a specific month, it will be absent from the chart.

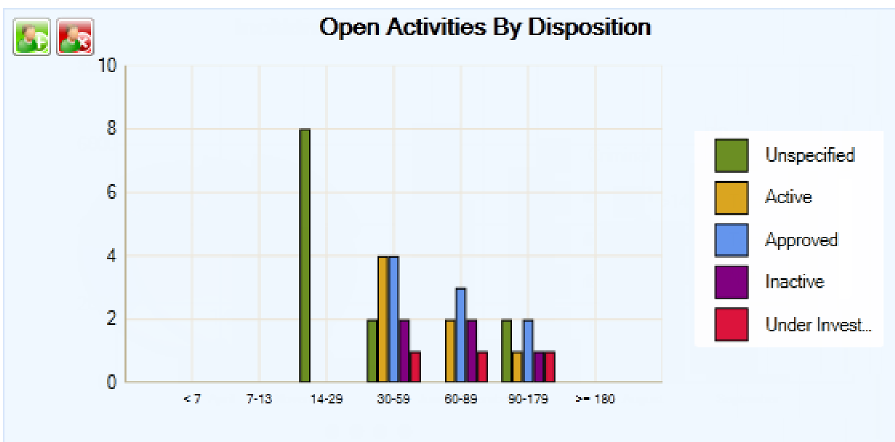


Loss by Month	Shows the monetary losses (Total Loss, Total Recovered and Net Loss), in dollars, resulting from the selected portion of incident activity in each of the past twelve months of the specified year. This chart is only available in the Bar chart form.

Open Activities by Disposition	This pre-set chart does not have any further chart settings and is only available in the Bar chart form. 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, etc.).

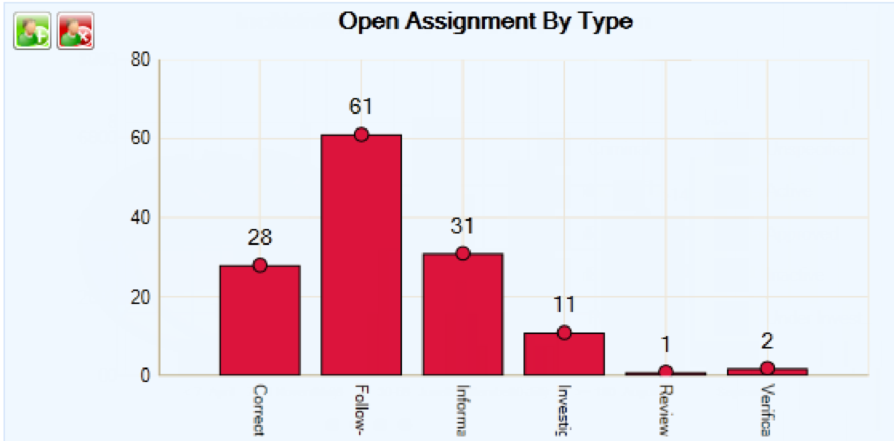
Open Incidents by Disposition	This pre-set chart does not have any further chart settings and is only available in the Bar chart form. Displays the number of incidents with an "Open" status colour-coded for specific Disposition (e.g., Unsolved) and arranged by the set periods of time for which the Incident records have been open.
Open Cases by Disposition	This pre-set chart does not have any further chart settings and is only available in the Bar chart form. Displays the number of cases without a Closed Date/Time colour-coded for specific Disposition (e.g., Active) and arranged by the set periods of time for which the Case records have been open.

When one of these charts is displayed on the Dashboard, you may choose to view the Activity/Case/Incident data filtered for a specific user. To filter the Activity data for a Record Owner, or the Case or Incident data for a Case Investigator/Case Manager/Case Supervisor, click on the plus icon in the chart section and select the required user from the entity list. To reset the filter and show the data that applies to all users in the system, click the x icon .



Open Assignments by Due Date	Displays the number of assignments that have not been checked off as "Completed" arranged by their closeness to the Due Date (e.g., Overdue, Tomorrow, Others).
Open Assignments by Type	Displays the number of assignments that have not been checked off as "Completed" arranged by specific assignment Type (e.g., Correction Notice, Information Request).

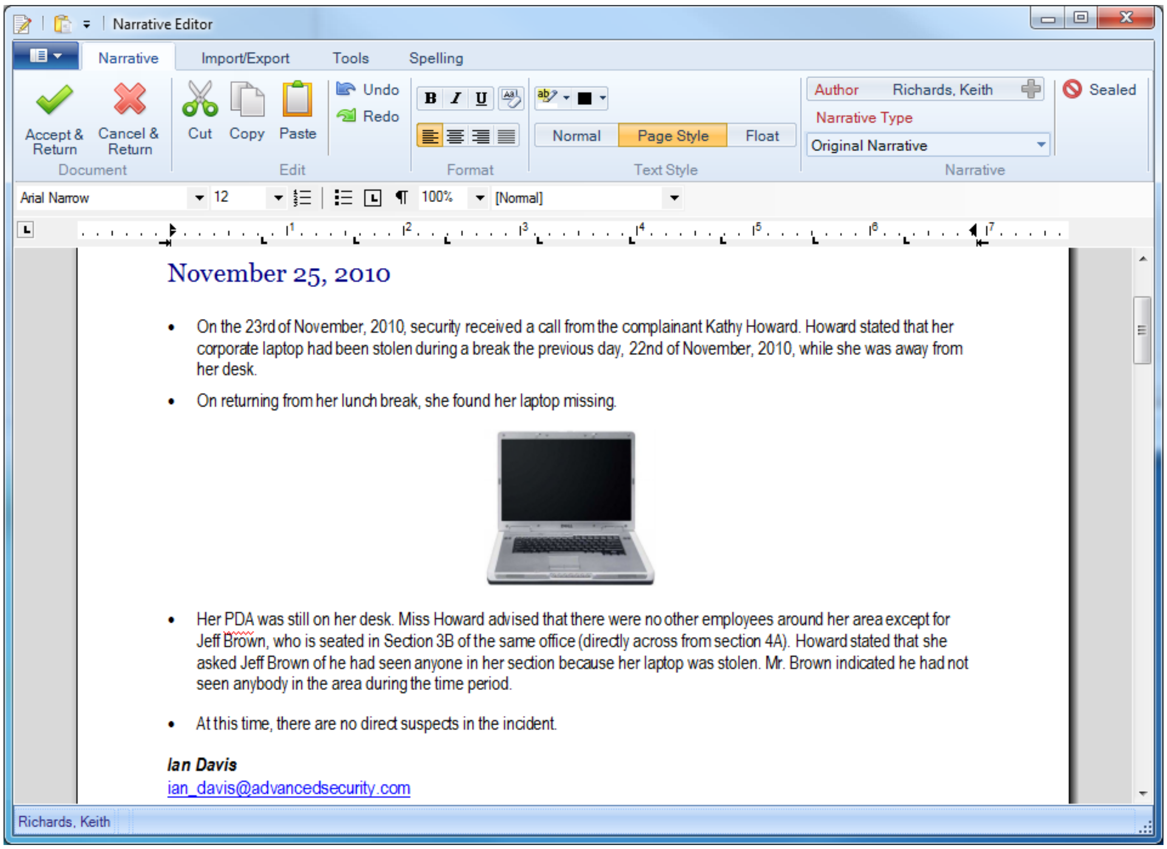
When one of these charts is displayed on the Dashboard, you may choose to view the Incident, Case and Activity assignment data that have been filtered for a specific recipient of assignments. To filter the data for a specific "Assigned To" user, click on the plus icon in the chart section and select the required user from the entity list. To reset the filter and show the data that applies to all users in the system, click the x icon .



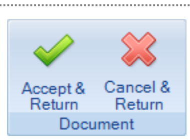
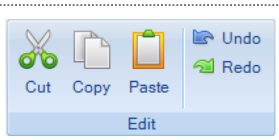
Perspective Gauge	Resembles an automobile speedometer gauge displaying the proportion of the number of incidents that has been recorded for the current year to the number of incidents that had been recorded in the year of your selection effectively comparing the two values. You can change the "compared to" year using the chart's attached lookup. The **Total Year** diagram compares the number of incidents for the total calendar years (e.g., the periods of January 1 to December 31). The **Year to Date** diagram compares the number of incidents for the years to the current date (e.g., if today's date is October 1, then it will compare the periods of January 1 to October 1 only). The **This Month** diagram compares the number of incidents for the current month (e.g., if today is October, then it will compare the months of October only).

Appendix B: Text Editor Navigation

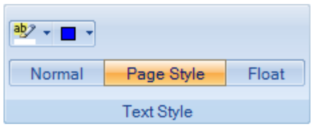
In Perspective, there are four types of text editor windows: **Narrative Editor**, **Summary Editor**, **Interview Editor** and **Send Message**. The corresponding editors enable entering and editing of (typically) large texts that convey incident or case narratives, investigation summaries and interviews, and descriptive email messages. Typing the content of a narrative, summary, interview or email, you can format your text with any of the options available under the editor's tabs (e.g., Narrative, Import/Export, Tools and Spelling).



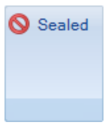
Narrative/Summary/Interview tab

	Click **Accept & Return** to save the changes made to the document and return to the main screen of the entry. If you wish to discard the changes made, click **Cancel & Return**.
	Edit position of parts of the entered text by selecting the portion of the text and applying the **Cut**, **Copy** or **Paste** options. The **Undo** and **Redo** buttons toggle the changes you have made to the document.

Format appearance of the text by making it **bold**, **italic**, or **underlined**. **Clear** the formatting, as needed. Apply the **centered**, **left**, **right** or **justified** text alignment.

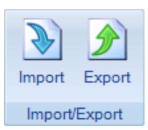


Choose the text **highlight** and **font color**. Toggle document views, choosing between the **Normal**, **Page Style** or **Float** (default) view.



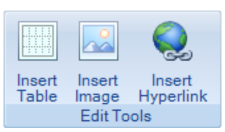
The **Sealed** option is available in the Narrative, Summary and Interview Editors only. It functions similarly to the Seal/Unseal button in the Viewing pane, by which clicking on it removes/assigns editing rights from/to the text. Note that once you seal the text, and then save and leave the corresponding record, it can never be unsealed.

Import/Export tab

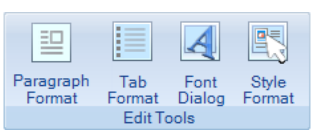


Alternatively to entering the text yourself, you may choose to **Import** an existing text document and its formatting into your text field. When finished with editing the text, you may also **Export** the text as an autonomous text document in multiple text formats.

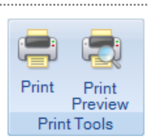
Tools tab



To enhance the content of your text, you can insert **tables**, **images** and **hyperlinks**. To display editing options of the default table frame, select the portion of the table you wish to edit and click the **Insert Table** button again.

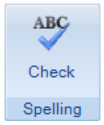


To edit the structure of your text, use the various **Paragraph** and **Tab Format** options. To format the font of your text and edit available text styles, use the **Font Dialog** and **Style Format** dialogs. Some of the most important text editing functions (e.g., text font, size, style, numbering, tabbing, visibility of formatting symbols, etc.) are also accessible directly from the autonomous toolbar that is located above the text field and that is not a part of any one particular tab.



If you wish to print your document, click the **Print** button. To preview the document before printing, click **Print Preview**.

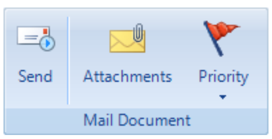
Spelling tab



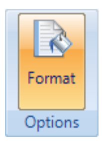
Although the spell check option is automatically applied to the text you enter (the incorrect text is underlined with a red wavy line), you can correct each spelling error one by one using the **Spelling** dialog box.

Additional Send Message options

The Send Message editor provides very basic options for editing a short email message that are all collected under one **Mail** tab. Typically, this message serves the purpose of providing some description to an automatically generated attachment that is sent out with the email (e.g., a record view or an assignment). In this case, the descriptive text will be provided by the system. If you wish, 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 High, Normal (default) and Low priority option. When finished with editing of your email message, click **Send**.



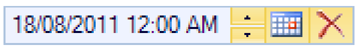
If you want to format the message details in plain text rather than the default HTML table, **unclick** the **Format** button. By default, the formatting option is active.

Appendix C: Data Field Types

Yes/No fields

Yes/No fields include both checkboxes and radio buttons. Simply click a checkbox or radio button to select it. Once selected, checkboxes will contain a checkmark and radio buttons will contain a dot.

Date/Time fields

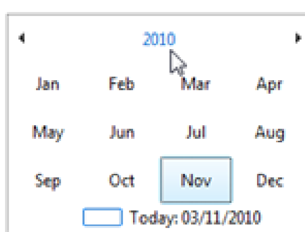


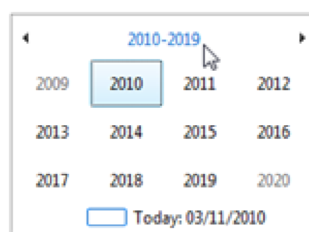
To enter a date in a Date/Time field, you have three options:

- Manually type the date in the field in MM/DD/YYYY format. Place your cursor in the month section and type two digits for the month, two for the day and four for the year, using leading zeros if necessary. Specify the time in TT:TT format adding AM or PM, if relevant.
- Place your cursor anywhere in the date or time field and click on the **up** and **down arrows** attached to the field to increase or decrease the time value accordingly.
- Choose the appropriate date from the field's built-in **calendar**.

To display the field's calendar, click the calendar icon to the right of the Date/Time field. The calendar will open on the current month and year with the current day highlighted. Use the adjacent scrolling arrows to adjust time, month or year.

If you are running Windows XP or Windows Vista, you may quickly advance the calendar to a different month or year. Click the appropriate time label to display a list of all the months in the year or years in a decade. Select the desired month or year to advance to the next level of time hierarchy (i.e., day or month).





After selecting a date, the calendar will close and the Date/Time field will automatically populate with the selected date, while the time portion will display 12:00 AM (or 00:00, depending on your machine's regional settings).

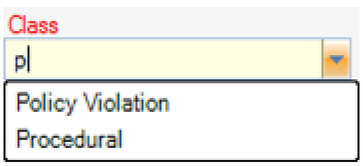
Note that at any time, you may select the current date by clicking the date marked Today at the bottom of the calendar, or by right-clicking the calendar and selecting "Go to today".

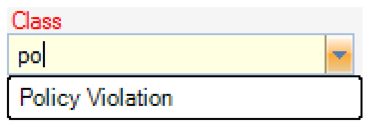
To clear the field of all values, click the Remove button to the right of the Calendar icon.

Lookup list fields

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

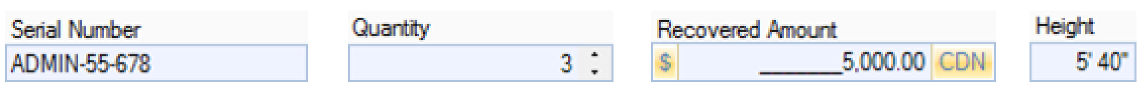
For more efficient data entry, you may automatically narrow focus in any lookup list to values beginning with the letters that you type. Simply start typing the value appropriate for the lookup field to display a lookup list containing only those values that **begin with** the letter(s) that you have typed.





If you are changing a lookup field value, you may hit the Esc key at any time to populate the field with the value that was saved previously. Note that if the lookup field is part of a hierarchy, any unsaved field values lower in the hierarchy may be erased.

Number fields



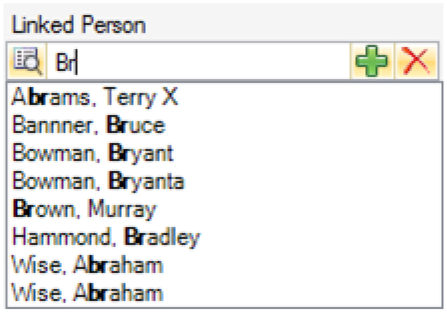
Perspective includes number fields for both whole numbers and numbers with up to two decimal places, as well as special fields configured for height, weight, value and year data.

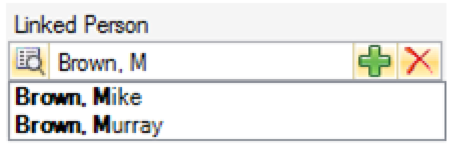
In any of these fields, you may type the desired value directly in the field. If up and down arrows are available, you may use them to adjust the value by increments of one.

Pick list fields

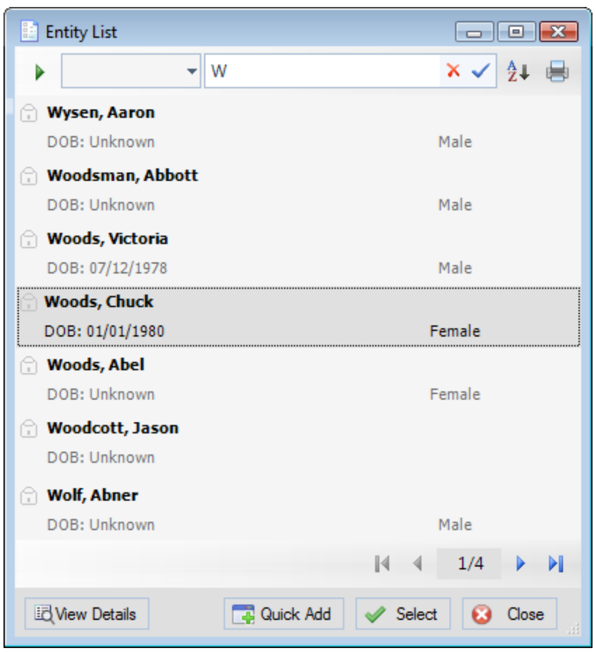
Pick list fields can be populated with values linked from the common database. There are two ways to link a pick list field to a value from the database.

First, you may **start typing an approximate value** directly in the pick list field to display a list of records showing only those values that **contain** the letter(s) that you have typed. Note that this option is not available if you are selecting an Investigator.





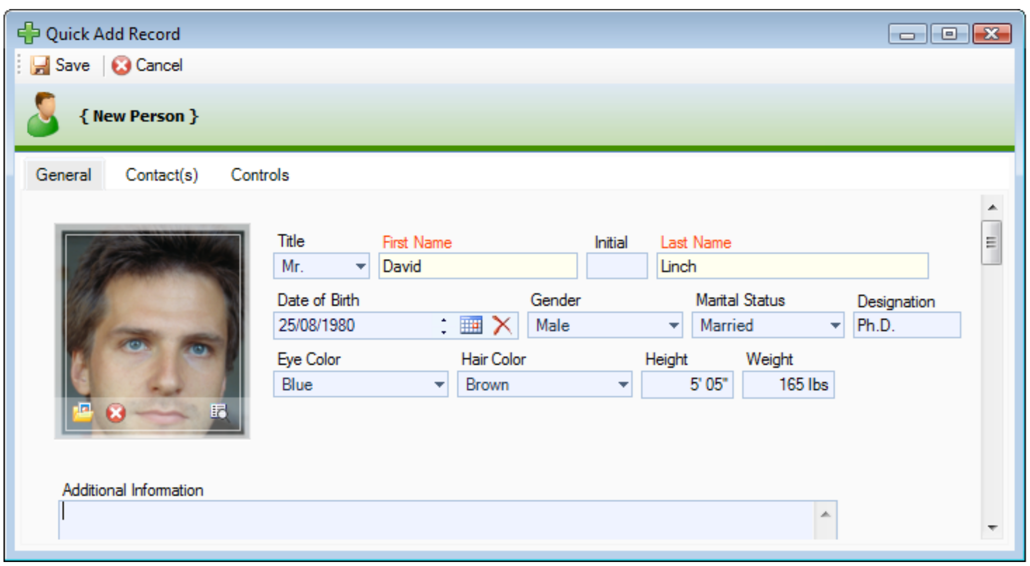
Second, you may **select the data entry from the appropriate Entity List** that opens when you click the Add icon to the right of the field. Note that some Person pick lists only allow persons designated as Perspective users, or Perspective users with specific privileges (e.g., Investigators) to be selected. In these pick lists, all persons available for selection will automatically be displayed in the window, and there will be no option to change the view.



- If you have a default view specified for the data entity, this view will be displayed in the pick list. If not, the window will be blank. You may select or change the view by choosing a pre-set view from the Entity List lookup. To reset the view to display all records, click the green arrow icon .
- To find a specific user in the list, start typing the name in the search field to automatically filter the user list by the letter(s) that you have typed. To apply the filter, click the checkmark icon . To remove the filter, click the clear icon and then the checkmark icon, to view the original list.
- To arrange the list alphabetically, click the A to Z icon .
- To print the list, click the Print icon .

- To quickly view a particular entity's record, select the entity in the pick list and click the **View Details** button located at the bottom of the dialog box. The record will open in read-only mode in a separate window. Close the window to return to the pick list. Note that if you do not have permission to view a particular entity's record, the View Details button will be greyed 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. Simply click the Quick Add button , and a blank data form will open in a separate window. Enter all known information, ensuring that all required fields (marked red) have been populated, and click Save when you are finished. The Quick Add form and the pick list window will close, and the field will populate with your entry. You can further edit your entity from there.

  Note: The Quick Add function is only available in Item, Person, Organization and Vehicle pick lists. Further, some Person pick lists only allow persons designated as Perspective users, or Perspective users with specific privileges, to be selected; these pick lists do not offer the Quick Add function.



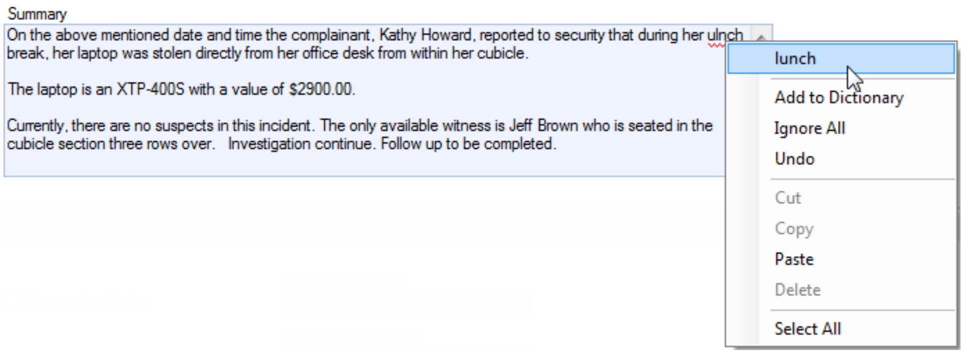
After populating a pick list field with a selected entity, you may click the **View Details** icon to the left of the field to quickly view the entity's record. The entity's record will open in read-only mode in a separate window. If you are not authorized to view the entity's record details, you will receive a message indicating this and the record will not open.

At any time, you may click the **Remove** button located next to the Add button to clear the field of the current selection.

Text fields

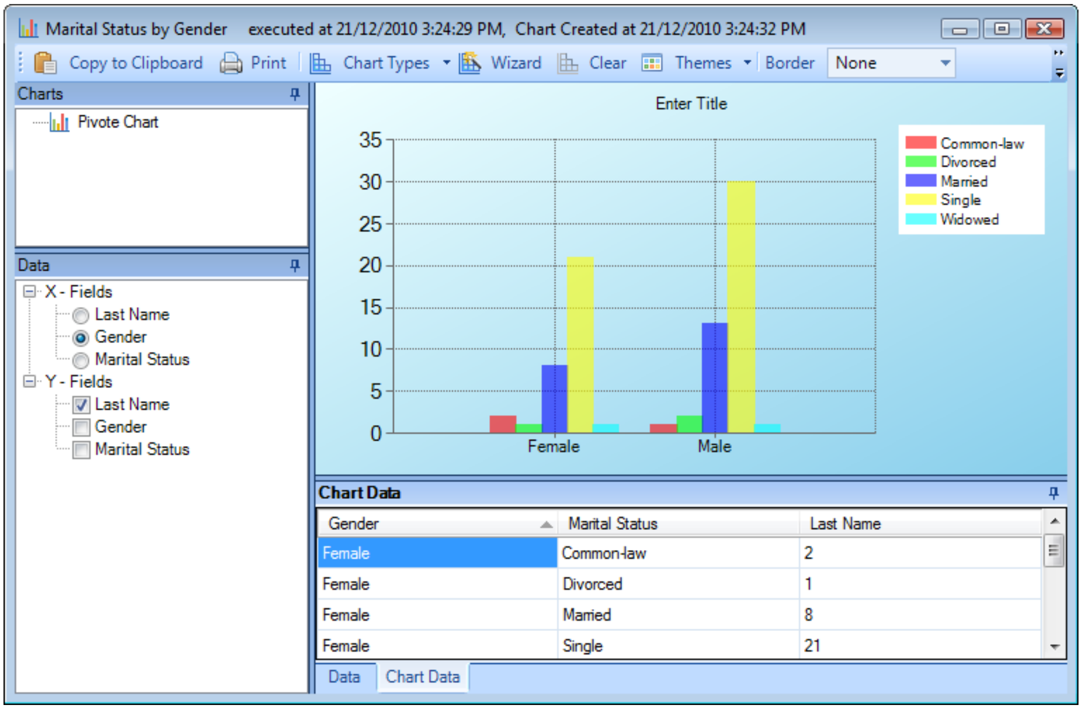
To enter a value in a text field, simply type inside the field. For additional options, including cut, copy and paste, highlight the applicable text, right-click and select the desired option from the menu.

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.



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.

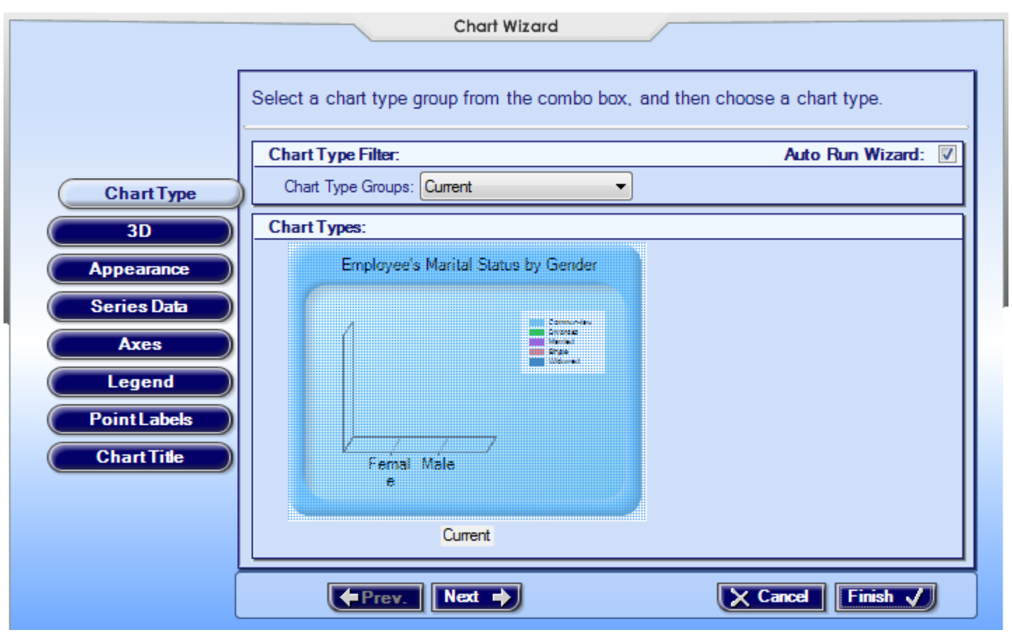
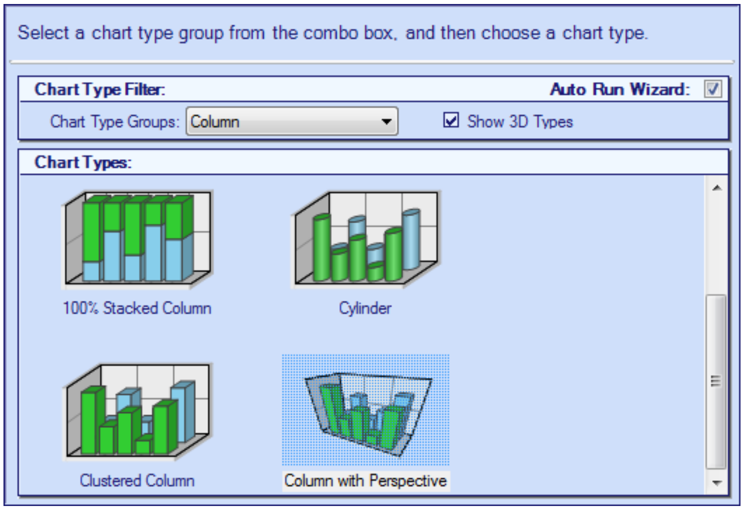


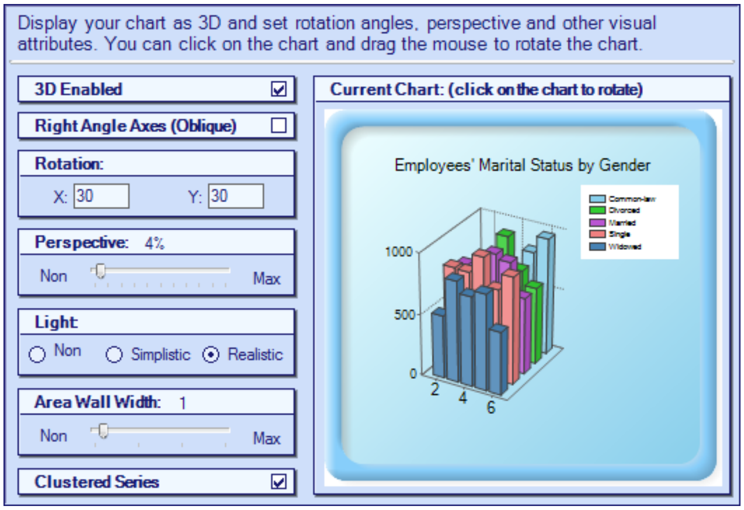
Chart Type

- 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.



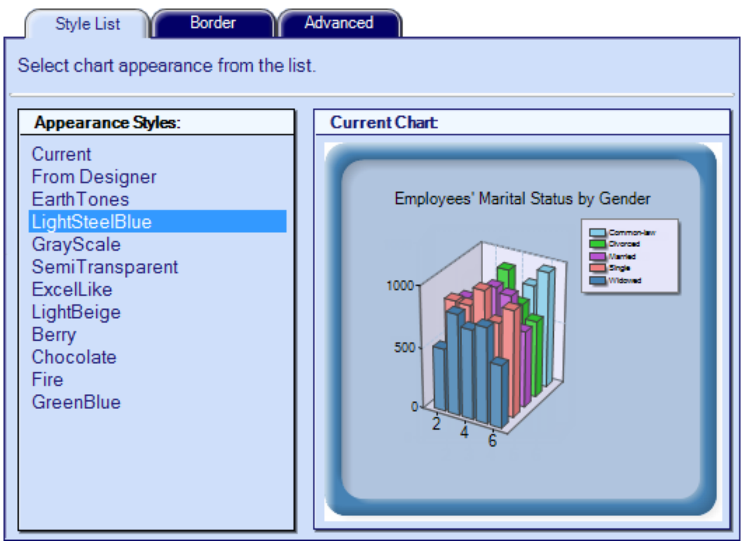
3D

- 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 wish to cluster the variables separately.

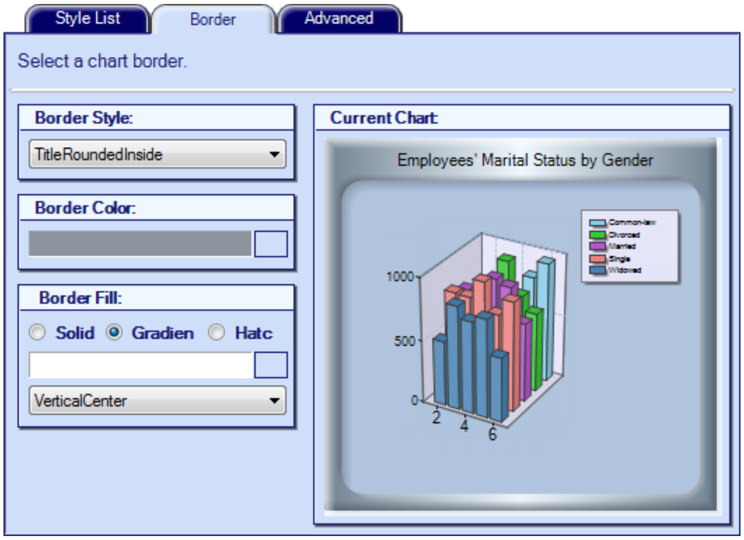


Appearance

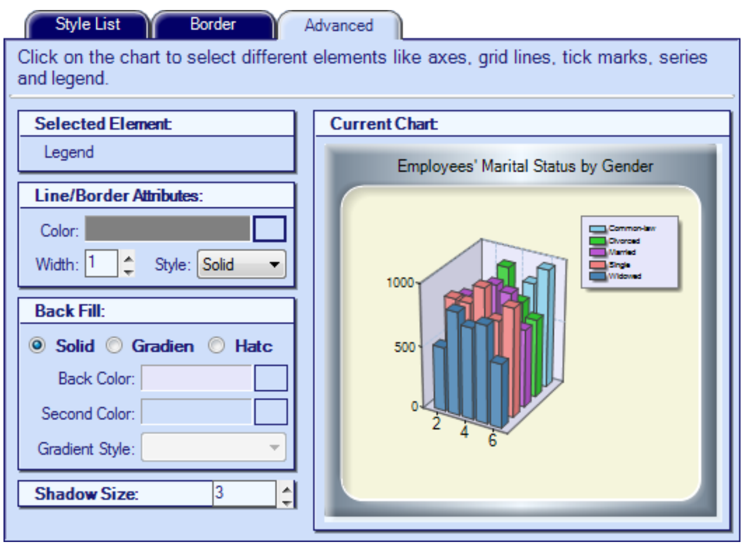
- Under the **Style List** tab, indicate what color scheme you would like to apply to your chart.



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

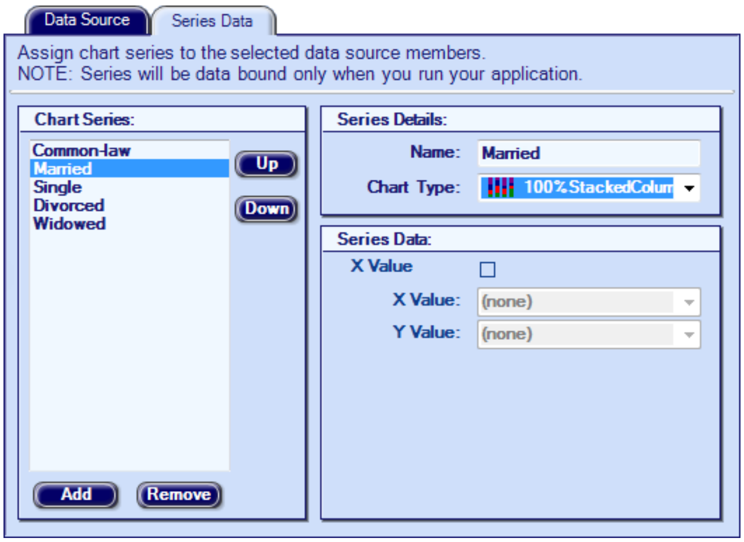


- Under the **Advanced** tab, select an element of the chart you would like to edit clicking on the chart image. In the **Line/Border Attributes** section, select the **Color**, **Width** and **Style** of the line border of the element. In the **Back Fill** section, adjust the chart elements' background colors and color schemes (Solid, Gradient or Hatch Background). In the **Shadow Size** section, set the depth of the shadow for the element.



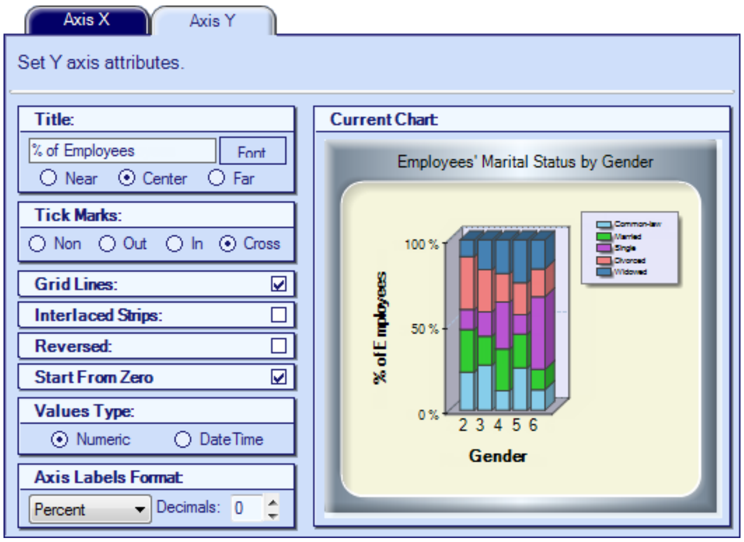
Series Data

- Under the **Series Data** tab, add, remove, move, rename and select Chart Types for the series variables included in your chart.



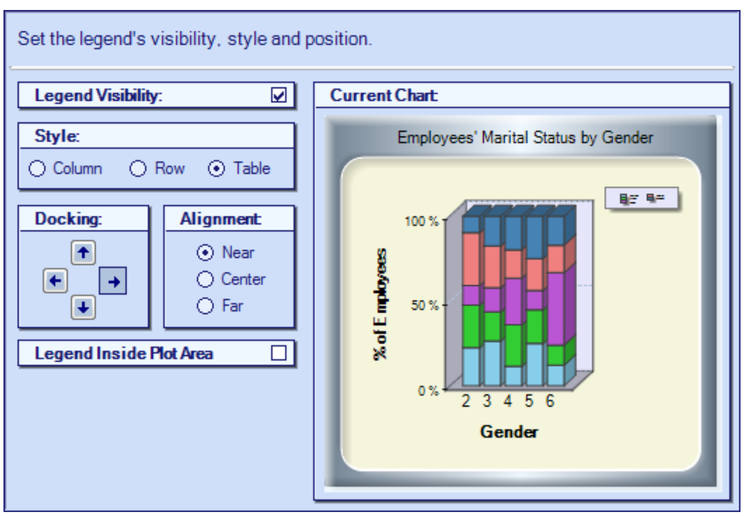
Axes

- Under the **Axis X** and **Axis Y** tabs, assign formatted axes **Titles**.
- Choose the placement of **Tick Marks** for axes values.
- Make **Grid Lines** visible or invisible.
- Apply **Interlacing Strips** of grey 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 wish 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.

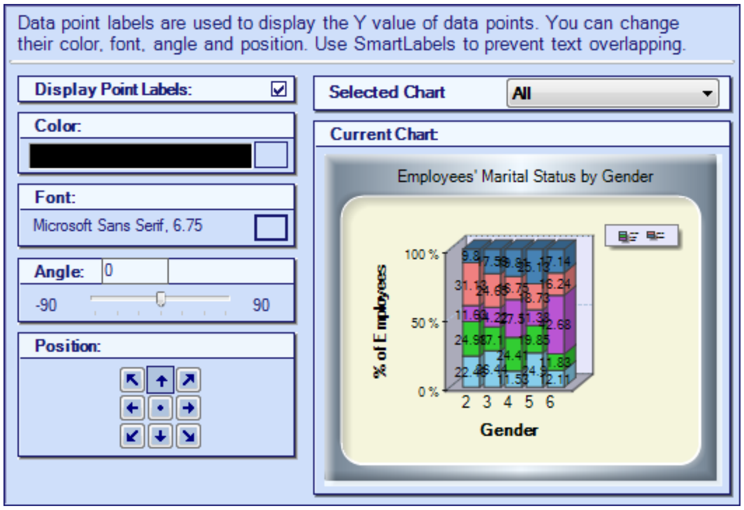
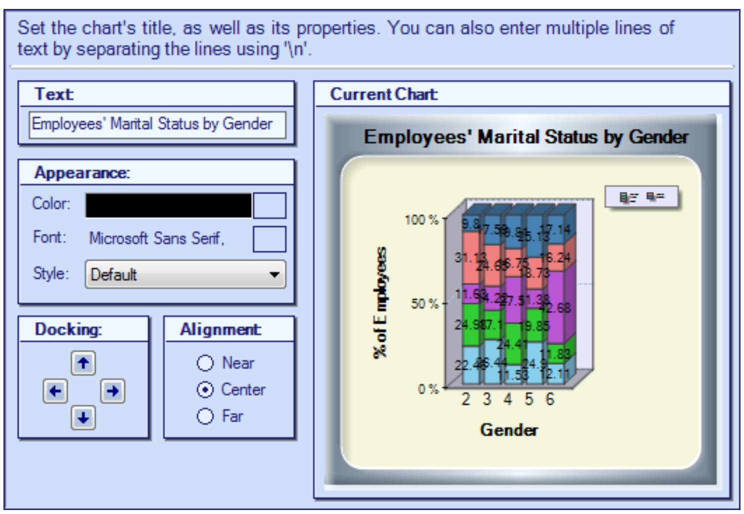


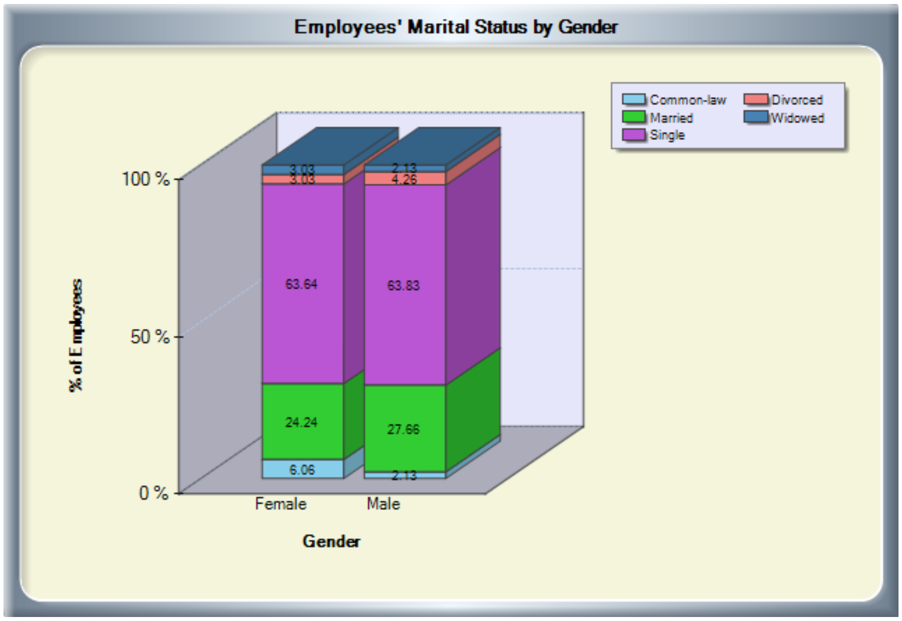
Chart Title

- 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.



Index

O

P

Software Solutions for Incident Management

www.ppm2000.com