

Incident management from every angle.™

User's Guide

Perspective by PPM 2000[™]

Version 3.3

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Contents

Welcome to Perspective by PPM 2000	8
Accessing Perspective	8
User Interface	11
Main System Components	12
User Privileges and Access Rights	13
Account Settings	14
Changing password	14
Dashboard settings	14
Email settings	15
Shortcut keys	16
Help Options	21
Contents Tab: Browse Help by topic	21
Index Tab: Browse Help via Index	22
Search Tab: Search Help	23
Quick Find Tool	23
Custom Search Feature	25
Exiting Perspective	25
Dashboard	26
Dashboard User Interface	
	26
User Interface	26 27
User Interface Charts	26 27 29
User Interface Charts Assignments	26 27 29 32
User Interface Charts Assignments Data Forms	
User Interface Charts Assignments Data Forms User Interface	
User Interface Charts Assignments Data Forms User Interface Workflow Overview	
User Interface Charts Assignments Data Forms User Interface Workflow Overview Select a data form	
User Interface Charts Assignments Data Forms User Interface Workflow Overview Select a data form Manage record views	
User Interface Charts Assignments Data Forms User Interface Workflow Overview Select a data form Manage record views Select a record from the list	
User Interface Charts Assignments Data Forms User Interface Workflow Overview Select a data form Manage record views Select a record from the list Enter and/or edit record data	
User Interface Charts Assignments Data Forms User Interface Workflow Overview Select a data form Manage record views Select a record from the list Enter and/or edit record data Incidents	
User Interface Charts Assignments Data Forms User Interface Workflow Overview Select a data form Manage record views Select a record from the list Enter and/or edit record data Incidents Create a new Incident record	

Identify all involved items	66
Summarize an incident or a case	68
Attach a file to a record	68
Link the incident to an activity	69
Link an incident to another incident	70
Link an incident to a case	72
Record losses involved in an incident and view their summary	73
Record incident investigation data	75
Control a record's processing options	84
Track changes made to a record	90
Cases	
Create a new Case record	
Assign an investigator to a case's investigation	
View all case's involvements	94
Summarize a case or an incident linked to a case	
Attach a file to a Case record	
Link an incident to a case	
Link a case to another case	
View a summary of losses involved in a case	
View and record case investigation data	
Control a Case record's processing options	100
View a quick summary of a case's key data	100
Track changes made to a Case record	102
Activities	102
Create a new Activity record	102
Record an officer's response to an activity	104
Record an organization's response to an activity	106
Note an action request for an activity	108
Identify all persons involved in an activity	109
Identify all organizations involved in an activity	110
Document all vehicles involved in an activity	110
Identify all items involved in an activity	110
Attach a file to an Activity record	110
Link an activity to another activity	110
Link an activity to an incident	111
Control an Activity record's processing options	112
Track changes made to an Activity record	114

Escalate an Activity record to an incident	115
Items	115
Create a new Item record	115
Import record's settings from the Gateway	116
View record's incident involvements	118
Attach a file to an Item record	119
Control record's processing options	119
Track changes made to an Item record	120
Persons	121
Create a new Person record	121
Record contact information	125
Link a record to a person	127
Link a record to an organization	128
Link a record to a vehicle	129
View person's incident involvements	130
Attach a file to a Person record	130
Control a Person record's processing options	130
Track changes made to a Person record	131
Organizations	131
Create a new Organization record	131
Record an organization's contact information	132
Link an organization to a person	132
Link an organization to another organization	132
Link an organization to a vehicle	132
View organization's incident involvements	132
Attach a file to an Organization record	132
Control an Organization record's processing options	132
Track changes made to an Organization record	132
Vehicles	133
Create a new Vehicle record	133
Link a vehicle to a person	134
Link a vehicle to an organization	134
Link a vehicle to another vehicle	134
View vehicle's incident involvements	134
Attach a file to a Vehicle record	134
Control a Vehicle record's processing options	134
Track changes made to a Vehicle record	135

Merge Records	135
Construct a Visual Link Chart for a Record	138
Reports	139
User Interface	139
Types of Reports	140
Administrator Only	140
Detail Reports	140
List	141
Lookups	141
Summary Reports	142
Creating a Report	142
Analysis Expert	147
User Interface	147
Workflow Overview	148
About Operators	149
Query Design Process	150
Create a query	150
Specify query criteria	150
Save a query	155
Edit a query	155
Clone a query	156
Share a query	156
Delete a query	156
Execute a query	157
Working with Query Results	158
View query results	158
Search for specific data in query results	160
Group query results by a field	161
Perform calculations on query results	162
Export query results	163
Print query results	163
Access records in query results and print reports	164
Construct a visual link chart from query results	165
Chart query results	166
Gateway	169
User Interface	170

Incidents	172
Items, Persons, Organizations and Vehicles	174
Perspective DispatchLog	176
Access Perspective DispatchLog	
User Interface	
Navigating the program commands	180
Create and Manage an Activity	
Start a New Basic Activity Record	
Record an Officer's Response to an Activity	
Record an Organization's Response to an Activity	
Note an Action Request for an Activity	
Add Persons Involved in an Activity	
Note general details of an involved person	
Add the involved person's clothing details	
Record the involved person's sustained injuries	
Flag the involved person	
Add Organizations Involved in an Activity	
Add Vehicles Involved in an Activity	
Add Items Involved in an Activity	
Add an Attachment to an Activity Record	
Give an Activity-Related Assignment	
Add Activity Notes	
Email a Basic Activity Record	
Delete an Activity Record	
Schedule an Activity	
Close an Activity	
Activity Statuses and Officer Statuses	
The relationship between Activity Statuses and Officer Stat	uses204
System values	
Dispatch Activities	
Bring an Officer On Duty	
Dispatch an Officer for an Activity	
Dispatch an Officer for Multiple Activities	
Dispatch an Organization for an Activity	
Dispatch an Organization for Multiple Activities	
Update an Officer's/Organization's Status	210

View or Update an Officer's/Organization's Location	211
Update an Officer's Call Sign	211
Clear an Officer/Organization from an Activity	212
Bring an Officer Off Duty	212
Additional Organizational Functions	213
Review Activity's Standard Operating Procedures	213
Display Activities Filtered by a Workgroup	214
Highlight Dispatched Officers/Organizations for Activities and Vice Versa	215
Filter all Dispatched Officers/Organizations for One Activity	216
View a Complete Officer Log	216
Clone Activities and Resources	217
Perspective Visual Analysis	218
Use Visual Analysis to Build a Link Chart	219
Access Perspective Visual Analysis	219
Create a Link Chart	220
Use IBM i2 ChartReader to Manipulate Your Link Chart	224
Transfer Your Link Chart into IBM i2 ChartReader	224
Additional IBM i2 ChartReader Resources	226
Contact Information	227
Technical Support	227
PPM 2000	227
Appendix A: Dashboard Chart Types	228
Appendix B: Text Editor Navigation	233
Appendix C: Data Field Types	236
Appendix D: Chart Wizard	241
Index	

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

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

 Perspective Version 3.3

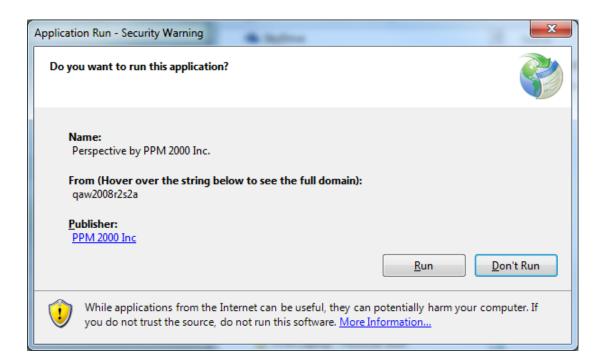
 Launch Perspective

 .vet Framework 4.0 needs to be installed to launch this application.

 If you do not have the .NET Framework:

 Click here to download .NET Framework 4.0 from Microsoft

- 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.



(63%) Dov	wnloading Perspective by PPM 2000 Inc.	
This	bading Perspective by PPM 2000 Inc. Is may take several minutes. You can use your computer to do other tasks ing the installation.	?
	Name: Perspective by PPM 2000 Inc.	
	From: qaw2008r2s2a	
	Downloading: 47.8 MB of 75.1 MB	
		<u>C</u> ancel

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.

	PPM 200
	Version 3.
Logon	Cancel

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").

▲			Perspective		
Main					© Privacy Legal
File Toggle Logoff Settin Settings		Analysis Exper			
🕀 📑 Shared Queries	Form(s)		Field(s)	Selection(s)	× (会事)
Private Queries				Group By	
				Display	
tem					
Vehicle					
			(3)		
2					
Dashboard					
DispatchLog	Criteria Properti				
Data Forms	Criteria Design		Field		Xalue
Reports	Symbol	Form	riela	Operator	value
Analysis Expert					
Gateway					
Administration	-				
×			(4	
carlosa RPM Role					Ready 😔 Connected

Main System Components

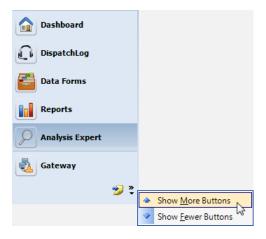
You can access all of Perspective's features and functionality from the Navigation pane. Just click on the buttons to switch between components, and then further explore each component by clicking on the options displayed.

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 <i>Perspective DispatchLog</i> 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 <i>Perspective Administrator's Guide</i> .

Customize visibility of the components by dragging the top border of the component section in the Navigation pane or clicking the configure arrow buttons. This will hide the bottom components one by one. Click on the pin icon $\overset{1}{\searrow}$ 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 in 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.

🤌 Change Password	×
Change Your Password	
Old Password	•••••
New Password	*****
Re-enter New Password	•••••
	OK Cancel

Dashboard settings

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

- 1. Click the **Settings** icon $\stackrel{>}{>}$ on the Ribbon. The Settings window will open with the General tab open by default.
- To modify how often your Dashboard refreshes, ensure the Automatically Refresh
 Dashboard Assignments box is checked, and in the field below, specify how frequently
 you would like the Dashboard to refresh (from once every minute to once every 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.

Settings 🛛
General Email Shortcut Keys
Automatically Refresh Dashboard Assignments
Refresh Every
1 minutes.
Changes require application restart. Reset Save Cancel

Email settings

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

- 1. Click the **Settings** icon $\overset{>}{>}$ on the Ribbon. The Settings window will open.
- 2. Select the **Email** tab.
- 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.

Settings	
General Email	Shortcut Keys
Do not use	mail options.
Outlook	A Notification works on 32-bit Outlook only.
 ◎ SMTP 	
Host	mail.example.com
Port	123456
Usemame	
Password	
	Use Default Credentials Vise Anonymous Access
	Enable SSL
Changes require app	olication restart. Reset Save Cancel

Shortcut keys

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

- 1. Click the **Settings** icon $\overset{>}{>}$ 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.

Settings	X
General Email Shortcut Keys	
Global	
Navigation Mode	Ctrl + N
Ribbon Menus *	Alt / F10
Navigation Keys	
Go to Data Forms	D
Go to Reports	R
Go to DispatchLog	L
Go to Dashboard	Н
Go to Analysis Expert	E
Go to Gateway	G
Go to Administration	M
	Reset Save Cancel

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	н
Go to Analysis Expert	E
Go to Gateway	G
Go to Administration	Μ
Go to Activities	Α

Go to Incidents	1
Go to Cases	C
Go to Items	S
Go to Persons	Р
Go to Organizations	0
Go to Vehicles	V
List All Records	W
Open Quick View	Q
Show Saved Views	к
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

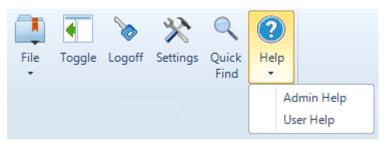
Last Page	Ctrl + Down Arrow
Previous Page	Ctrl + Left Arrow
First Page	Ctrl + Up Arrow
Jump to Page	Ctrl + 1
Focus on Selected Record	Ctrl + L
Add *	Ctrl + Plus
Edit *	Ctrl + E
Focus on Details Tabs *	Ctrl + F
Delete *	Ctrl + Minus
Controls	
Link Record: Open List	Ctrl + W
Link Record: Quick View	Ctrl + 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 1 to fill the Viewing pane with information on the selected subject.

🖞 Contents 📃 Index 🔽 Search				- Search -	
×	Selec	t dei	neral role rights		_
Welcome to Perspective by PPM 2000		. 9.			
Get Started				a a a a a a a a a a a a a a a a a a a	
Navigation Options	All Role	settings	are located under the Roles tab o	f the Administration section in the Administration component.	
? Security Laver Overview					
System Administration Components				ntain a list of general rights with two columns of Enable and Allow Override	
General Settings				xes will be checked allowing the corresponding role right or set of rights to be	
Workgroups	ove	rridden a	at the User level.		
System Privileges					
Roles	Save 👘	Add 🔮 Edi	t 🖳 Delete 😧 Cancel		
? Add a new role	General F	Role Defaults	Role Rights Privileges Reports		
Establish default security controls, lanc	2	M	View Audit History	*	
? Select general role rights					
Specify visibility and access privileges			Override		
View discrepancies between role right:	Enabl	e Allow	GeoRolup City Edit		
Set report visibility for a role			Metric measurement unit		
? View discrepancies between role and					
Users			Gateway Administrator		
Officers			Gateway Approver		
Auditing			Edt Exchange Rates		
Form Labels		2	Editing All Narratives/Summaries	-	
Lookups			Locking Records		
Flags			Unlocking Records		
Standard Operating Procedures			Sealing		
Visual Alerts			Visual Analysis Access		
Gateway Administration		2	Quick Find Access		
Administrative Reports			Focal Point Access		
Service Manager			Allow Merge Entities		
Additional Information					
			Allow Dispatchlog Access		
		rate on new re	ecords for:		

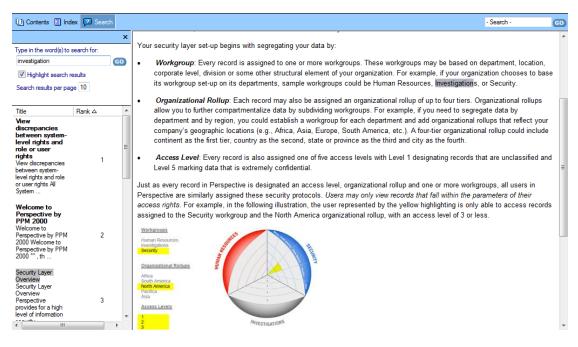
Index Tab: Browse Help via Index

- 1. Scroll through the listed keywords or type a keyword to reference.
- 2. Click a keyword from the list to display the associated topic.

) Contents 📃 Index 🜠 Search		- Search -	
×	Establish default security controls, language and currency for	a user	_
e in the keyword to find:			
er rights	All Users settings are located under the Users tab of the Administration section in the Administration com	ponent.	
Al -			
About Access for Roles	Note that any default settings specified for the user's role will automatically be assigned to the user. Verify	inat these settings are	
Access for Users	appropriate for the user and, if necessary, complete the following steps to modify them.		
Access Privileges			
Accessing Custom Search	 Open the General tab, the User Defaults sub-tab. 		
Accessing Focal Point			
Accessing Quick Find Accessing Visual Analysis	Select the workgroups you would like the user to have access to from the Workgroups list.		
Activity Prefixing			
Add Officer Alert	3. From the Default Workgroup lookup list, select the workgroup the user will be working in most often.	When the user creates a	а
Add RTA Alert	new record, it will be stored in the user's designated Default Workgroup, unless they assign it to one of	of their other workgroups	ι.
Adding		• •	
Assigning to Roles Assigning to Users	4. Assign an organizational rollup to the user in the Org Rollups section. Organizational rollups are hiera	rchical, so the option yo	JU
Audit Logs	select in the Org Level 1 field will determine what options are available in the Org Level 2 field and so o		
Case Prefixing	hierarchy, organizational rollups become more specific, naming groups within your organization that an		
Currency			
Define Visual Representation of Certair Discrepancies from Role Report Visibili	by company division or region. The user will only have access to records with organizational rollups the	the second se	
Discrepancies from Role Report Visibili Discrepancies from Role Rights	lower than, the organizational rollup you select for the user. For example, if a record's organizational ro	ollup is North	
Discrepancies from System Rights	America/Canada/Alberta and the user's organizational rollup is North America/Canada, the user will ha	we access to the record	I.
e-Reporting Access Options			
Gateway Administrators	5. Assign an Access Level to the user. The user will only be permitted to view data with the same or low	er access level as their	
Gateway Approvers General Rights	own.		
Importing Options			
ncident Prefixing	6. Assign a Default Language to the user. This determines the field labels that will appear on forms whe	on the user is logged on	
anguage	o. Fissign a benaut Lunguage to the assist this actemines the hold labels that will appear on forms whe	in the user is logged on.	
ookup List Visibility	7. Set the Default Currency for the user. All currency values entered in Perspective will now appear for the	ne user in this currency	
Report Cover Page Security Controls ==	7. Out the Delaute currency is the user. 7 in currency values entered in respective with how appear for a	ic user in this currency.	
Setting Report Visibility	8. Check the Metric measurement unit box to allow the user to see all measurement data in metric valu	100	
Setting System Visibility			
ser	9. To allow the user to assign an access level, organizational rollup and/or workgroup to a new record that	r is higher or different fro	m
ser Level 🔻			
4 III	their own, check the Allow elevate on new records for Access Level, Org Rollups and/or Workgroup	Checkboxes. For	

Search Tab: Search Help

- 1. Type a word or phrase and click the **Go** button. Perspective Help will list topics containing the word or phrase below.
- 2. Click the topic you want to display. The topic will appear in the Viewing pane.



Quick Find Tool

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

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

- 1. Click the **Quick Find** button \bigcirc 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.
- 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.)

		Enter Search Strin	5	
		laptop	Search 🥝	
	Hits	Record	Details	Туре
<u> </u>	6	INCD000000183	Occurred From Date/Time: 09/03/2009 0:20:00	Incident Narratives
****	3	INCD000000180	Occurred From Date/Time: 15/04/2009 12:55:00	Incident Narratives
	3	INCD000000180	Occurred From Date/Time: 15/04/2009 12:55:00	Incident Narratives
****	2	INCD000000183	Occurred From Date/Time: 09/03/2009 0:20:00	Incident Narratives
	2	INC-2006-000188	Occurred From Date/Time: 24/07/2008 10:31:40	Item Involvement
otop" aj t Area	•	e(s) within 5 area(s) of text.		
			mplainant Kathy Howard, who was reporting that during a lunch hour	
			npianani Kainy noward, who was reporting that during a functi nou	break and while she was away from her desk,
	a of March, 20 ate laptop was		inplanant Kathy Howard, who was reporting that during a functi nou	break and while she was away from her desk,
	ate laptop was		npiamani Katiy noward, who was reporting that during a funch nou	break and while she was away from her desk,

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 M 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 I 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 is 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

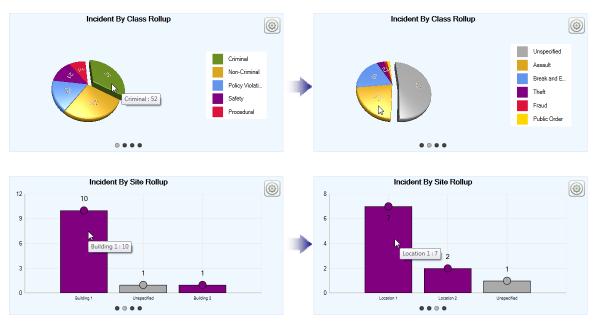
The four pre-set charts on the Dashboard give you a quick overview of trends found in the Perspective database records you have access to. To select the combination of up to four charts for display on the Dashboard, follow the simple steps described below.

- 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 preconfigured 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.

Chart Options	-		×
Chart 1	Select Chart Perspective Gauge Class ID Site	U.	•
Chart 2	Select Chart Incidents By Site From Last 365 Days Chart Type	Top 10 🔻	
Chart 3	Select Chart Incidents By Site From Last 365 Days Chart Type	Top 10 v	
Chart 4	Select Chart Incidents By Organizatio From Last 365 Days Chart Type	nal Rollup Top 10 ▼	•
		ок	Cancel

- 5. Click **OK** to see the results displayed on the Dashboard.
- 6. At any time, you may change the chart options for each individual chart displayed on the Dashboard by clicking the corresponding **Settings** icon ⁽²⁾. This will open the options window for the chart that you chose to modify.
- Examine one particular chart in detail by clicking the Maximize icon in the upper right corner of the relevant chart section. To dock it back together with the rest of the charts, click the equivalent Minimize icon a.
- 8. If the chart you selected is either a uni-coloured bar chart or a pie chart, you may be able to explore the information contained in the chart further. By clicking on a bar or a pie sector that corresponds to a specific category, class, organization or site, you may expand the data that is hierarchically subordinate to the data currently displayed on the screen. For example, if you are viewing the Incident By Class chart, you may click on the green pie sector that corresponds to the Criminal class of incidents to open a pie chart for all incidents contained under the Criminal class (e.g., Assault, Theft, Fraud, 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.

View All 📪 Export 🛛 🗑 Go To - PPMI-2009-000260 🛛 😂 Reset Layout 🛛 Clear Filter 📙								
	Completed?	Number	Assigned Date	Assigned By	Assigned To	Due Date	Assignment Type	Message / Task
	V	CCWI-2011-02-00057	24/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity	
	1	CCWI-2011-02-00057	24/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity	
	V	CCWI-2011-02-00057	22/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity	
		Mark Consultated	/2010	St. Jean, Clint	180, Deb F		Follow-up Activity	
		Mark Completed	/2010	St. Jean, Clint	180, Deb F		Follow-up Activity	
		Go to Record	/2010	Jabbar, Abdul	St. Jean, Clint		Follow-up Activity	
		INCD00000172	02/08/2007	Kemper, Dale	St. Jean, Clint	30/11/2007	Follow-up Activity	Attend court for th

• *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.

As	Assignments									
View All 🐺 Export 🛛 😨 Go To 😂 Reset Layout Clear Filter										
Completed? Assigned By										
-	Fals	se (3 items)								
		Completed?		Number	Assigned Date	Assigned By	Assigned To	Due Date	Assignment Type	Message / Task
				PPMI-2009-000260	01/10/2010	St. Jean, Clint	180, Deb F		Follow-up Activity	
				LACP-2010-000012	27/09/2010	Jabbar, Abdul	St. Jean, Clint		Follow-up Activity	
				INCD000000172	02/08/2007	Kemper, Dale	St. Jean, Clint	30/11/2007	Follow-up Activity	Attend court for th
True (4 items)										
		Completed?		Number	Assigned Date	Assigned By	Assigned To	Due Date	Assignment Type	Message / Task
		V		CCWI-2011-02-00057	24/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity	
		\checkmark		CCWI-2011-02-00057	24/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity	
		1		CCWI-2011-02-00057	22/02/2011	St. Jean, Clint	111, Admin		Follow-up Activity	
				PPMI-2009-000260	01/10/2010	St. Jean, Clint	180, Deb F		Follow-up Activity	

Data Forms

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

User Interface

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

Quick View	Incidents		DKCD000000183				
QUICK VIEW	Erter film Sect	× 🖌 24 📾	Criminal/Theft/Company I	Property/Over \$1000		13	
Saved Views	11NC-000000080	ш	Save Bedt & Add X Del	lete 👔 Lock 🗃 Print 🔂 Send	Cancel		
All Records	(0) Salety 12-2011-02-00036 (0) Criminal	Open UU Doen	General Involvements z Detais	Neratives Attachments	♦ Links ♦ Losses ♦ Inver	4	
Carrent Carl	1Z-2011-000112	ω.	Incident Number	a-Incident Number			
duilles	(0) Non-Oriminal	Open	INCC0000000183	e-rickert number			
cidents alies ens	 INCD-2011-02-00035 (0) Cremel/Assault/Prpury/No Wespon INCD-2011-02-00031 	Cpen CD	Reported Date/Time 09/02/2009 12:00 AM	File Number			
ma reore rganizations	(0) Criminal (0) INCD-2011-02-00022 (0) Nan-Criminal	Open Open	Occurred From Date/Time 09/03/2009 12:20 AM	Occurred To Date/Time 0903/2009 12:21 AM	Incident Duration 0 hour(s) 1 minute(s)		
hicles	1NCD-2011-02-00021	Ш.	Cass	Ste A	Level 1 North America		
Dashboard	(0) Non-Criminal (0) INCD000000187	Open E	Category Theft	Building 2	Level 2 United States		
DispatchLog	(1) Policy Violation	Closed	Subcategory Company Property	Location Location 1	Level 3 Subsidiary 3		
Data Foress	(1) Non-Criminal/Security & Safety Syst	Closed	Type	Section	Level 4		
Reports	(i) Procedural/Emergency Situation/Bie	Closed	Over \$1000	Section A	Research & Development		
Analysis Expert	(1) ProceduraUACCIDENTS/Chemical/In	Open	On the above mentioned date and time the complainant, Kathy Howard, reported to security that during her funch break, her laptop was stolen directly from her office deak from within her cubicle.				
Gateway	INCD000000183 E (2) Criminal/Theft/Company Property/O Close		The laptop is an XTP-6005 with a value of \$2900.00. Currently, there are no suspects in this incident. The only available witness is Jeff Drown who is seated in the				
Administration	INCD000000182	Ψ	cubicle section three rows over	te completed			
	t	6 6 1/8 P M					

- 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.	Enter filter text
To hide the Listing pane, click the Auto Hide pin icon. Once the pane is hidden, access it by clicking the pane's newly-created shortcut button on the left side of the screen and "unpin" it by clicking the pin icon again.	Incidents
If Perspective displays a list of entities (e.g., incidents, persons, 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.	I¶ ₹ 1/30
To print the record list as it appears in the Listing pane, click the Print button located at the top of the Listing pane.	Incidents

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.	♦ Involvements ♦ Narratives ♦ Attac
View more tabs. If these arrows appear next to a row of tabs in a form, there are more tabs available than are currently visible on-screen.	♦ Narratives ♦ Attachments ◀ ►
Expand or collapse a section to view or hide its contents.	Supplemental Details

To 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.	Last Name
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.	Last Name Unitia [‡] irst Name Initi Woodcott ¹ Jason
To sort the grid data by a particular column, click the column heading once. Click it again to sort the data in reverse order.	Last Name First Name Initi Woodcock Wendy L Parker Peter

Workflow Overview

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

- 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.
- 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.

ltems

- 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.

	neral
•	Create a new Organization record.
Con	ntact(s)
•	List the organization's known addresses, phone numbers and email addresses.
Link	(S

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

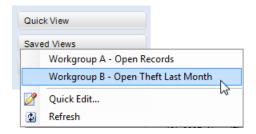
Display all records in the Listing pane

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

Quick View	
Saved Views	
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.

La, Record Views				X	
Workgroups Workgroup A Workgroup B Workgroup C Workgroup D All Workgroups		Saved Views Enter View Name Workgroups ABC V Set as default Add	Open Theft Last Month view Cancel Save	Export Via Email Save View As Import View	
Criteria Field Name Status	Operator =	Value • Open			
 None And Or Occurred From Date/Time None And Or 	▼	▼ 17/11/2010	: 💷 🗙 🔲 F	loating Date	
Occurred From Date/Time None And Or Class Rollup	• =	Previous 90 Days Criminal\Theft	• V F	loating Date	
Order By Incident Number	 Ascendi Descendi 	-	ed Records	Preview	
RowNumber Incident Number File Num	mber Occurred From Date S	itatus Class Rollup	Access Level Organization	Roll AttachmentCount	
1 INCD00000016 TP-220	06 2008/08/30 02:15:0 C	Open Criminal/Theft/P	Level 1 (Lowest)	4	
2 INCD00000015 TP-874	63 2008/04/01 10:05:0 C	Open Criminal/Theft/P	Level 1 (Lowest)	0	
3 INCD00000014	2008/07/03 09:00:0 C	Open Criminal/Theft/C	Level 1 (Lowest)	0	
4 INCD00000014 TP-771	2008/01/28 07:30:0 C	Open Criminal/Theft/P	Level 3	0	
5 INCD00000012 TC-117	7 2007/09/25 08:32:0 C	Open Criminal/Theft/C	Level 1 (Lowest)	0	
6 INCD00000010 TP-793	3 2007/06/02 06:00:0 C	Open Criminal/Theft/P	Level 5 (Highest	1	
7 INCD00000009 TH-713	33 2007/04/01 02:40:0 C	Open Criminal/Theft/P	Level 1 (Lowest)	• 0	
Page Results: 16 Records.					

- 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".

Rollup CLASSROLLUPS	E
Class Rollup Criminal Criminal Criminal Criminal Criminal Criminal Criminal Criminal Company Property Criminal Company Property Criminal Procedural Criminal Procedural Criminal Criminal Criminal Criminal Crimin	
L	Select Cancel

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.

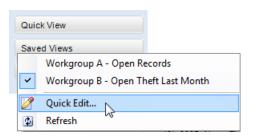
6. Choose a display order for your record view by selecting a field from the Order By lookup list (e.g., order records by Incident Number, Access Level, Status, etc.), then select either the Ascending or Descending radio button to further define the record order. Ascending lists the records according 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.
- 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).
- Expand the Saved Views menu and select Quick Edit. The Record Views window will pop up.
- 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.

🖳 Send Message				
Mail				
ABC To: perspectivetestuser	@gmail.com			
Send Attachments Priority Cut Copy Paste Check Check	ppm2000.com			
Subject: Emailing: Workgrou	ups ABC Open Theft Last Month.xml			
Mail Document Edit Mai	il Properties			
*	I ⁶ _ ⊀ I ⁷	1 ⁸		
This email was generated by Perspective Views Export with the follow	ving file or link attachments:			
Workgroups ABC Open Theft Last Month.xml				
Add \ Remove Attachments	X			
	🖶 Add 🗙 Remove			
File Name V	Size			
Workgroups ABC Open Theft Last Month.xml	1.1 KB	=		
		*		

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.
- 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".

Incidents	ą
INCD	× 💉 🛃 🖶
TINCD-2011-02-00021	ω ^δ
(0) Non-Criminal	Open
1NCD000000187	
(1) Policy Violation	Closed
F INCD000000186	
(3) Non-Criminal/Security & Safety Syste	Closed

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

Note 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.

P	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.
2	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.
î	Lock	Bars a record from editing.
F	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.
8	Cancel	Switches the record from the "edit" to the "read-only" mode without saving changes.
1	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.

Save	📝 Edit 🖶 Add	📉 Delete 🔒 Lo	ck 븜 Print 🖂 Sei	nd 🛛 😧 Cancel		
Gene	ral 🔷 Involvem	ents 🔷 Narrativ	es 🔶 Attachmer	nts 🔶 Links	Loss Summary	🔶 Investigat ∢
Persons	Organizations	Vehicles Items				
• <u>Add</u>	New = <u>Edit</u>	<u>Remove</u> <u>Go</u>	to			
Involve	d Person: 4					
		Last Name	First Name	Initial	Involvement Type	Date of Birth
1	Linked Person	Last Name	That Name	minutan	involvement Type	Date of Birth

To start editing details inside the record, you have to first put the record into the "edit" mode by clicking **Z 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.

Reported Date/Time	File Number
26/06/2008 08:00 AM 📫 🕅 🗙	
Occurred From Date/Time	Occurred To Date/Time
27/06/2008 08:00 AM 📫 🏢 🗙	_/_/: : 🎟 🗙
Class	Site
Criminal 👻	Nova Scotia 👻

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 rightarrow 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.
- 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.)

General Involvements	♦ Narratives ♦ Attach	ments <	Links 🔷 Losses	 Investigation 	
Details					
Incident Number ADMI-2010-000124	e-Incident Number				
Reported Date/Time 23/11/2010 09:30 AM	File Number TH-3079-B				
Occurred From Date/Time	Occurred To Date/Time		Incident Duration		
22/11/2010 04:20 PM 📫 🏢	× 22/11/2010 05:00 PM	: 💷 🗙	0 hour(s) 40 minute(s)		
Class	Site		Level 1		
Criminal	▼ Site A	-	North America	-	
Category	Building		Level 2		
Theft	▼ Building 1	-	Canada	-	
Subcategory	Location		Level 3		
Company Property	▼ Location 1	-	Subsidiary 1	-	
Туре	Section		Level 4		
Over \$1000	▼ Section A	-	Administration	-	
Summary					
On the above mentioned date an break, her laptop was stolen direc The laptop is an XTP-400S with a	tly from her office desk from with a value of \$2900.00.	in her cubicle	ə.		
Currently, there are no suspects ir	n this incident. The only available nvestigation continues. Follow-up				

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.
- 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 Followup Date.

♦ General ♦ Involvements	♦ Narratives ♦ Attachments ♦ Links ♦ Losses ♦ Investigation	••
¥ Details		
Supplemental Details		
 Reported to Police Reported to Division Reported to Supervisor Follow-up Required 	Police File Number OCC-131-05 Division Reported To Investigations Supervisor Reported To IIIQ Durov, Alex Follow-up Date 30/11/2010 : IIII X	
¥ Flags		

Flag the incident

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

Flags		ntal Details		
		Description	Status	
1	۷	Workplace Violence	No	
۴	κ	Suspect Known to Victim	Unknown 👻	
1	н	Hate Crime	No 🔻	
1	D	Drugs/Alcohol Involved	No 🔻	
8	N	DHS	No 👻	

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.
- 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 New Record			- C X
OK Cancel			
Linked Person C Brown, Jeff	Mr. 🔻 Jeff	 Associated Losses Exposure Averted Loss Total Loss Total Recovered Net Loss View Losses And Recoveries	\$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00
Employee? First Aid Administered? Injured Person Hospitalized?	Notes The only available witness is Jeff Brown who (ADMIN-77) three rows over Kathy Howard.		

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.

Elick to Add Clothing Details	
	>
Clothing Type Color Description	

Record the involved person's sustained injuries

- 1. Open the "Click to Add Injury Details" link.
- 2. Specify the Injury Cause and Severity.
- 3. Include a detailed description of the injury in the **Description** text box.
- 4. Repeat for as many injury entities as necessary.

🖶 <u>Click to Add Injury Details</u>	
	×
Injury Cause Severity	
Description	

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.

	😧 Cancel						
Flags	Description	Statu	s	Severity		Flag Notes Jeff Brown is the only witness of the incident.	_
۳ ₩	Wanted	Yes	Ŧ	Critical	-		
💛 V	Violent	Unknown	Ŧ		•		
🂛 т	Trespasser	Yes	Ŧ	Low	-		
1	Infectious	No	Ŧ		-		
🌪 в	Escapee	No	Ŧ		-		
A A	Armed and Dangerous	No	Ŧ		-		

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.

ersons		Vehicles Item											
tvolved	Person: 2												
• <u>Add</u>	New • Edit	• <u>Remove</u> • 9	<u>So to</u>										
٣	Linked Person	Last Name	First Name	Initia	al I	Involvement Type	Date of Birth	Gender	Employee?	Interviewed?	Person Loss?	Notes	
	Brown, Jeff	Brown	Jeff	L		Witness	03/27/1980	Male	2	7	Г	The only availab	
	Hatfield, Carmen	Hatfield	Carmen			Complainant	04/20/1981	Female				Reported servic	
						11							
15 Million		Title	First Name	Intia	Last	Name	Involve	ment Type					
		Mr.	Jeff	L	Bro	wn	Witner	15					
		Date of Birth		nder		Martal Status	Design	ation(s)					
5	2-	3/27/1980		ale		Divorced			- L				
	00	Hair Color Brown		e Color ue		Injuries: 0							
	2					Clothing: 0							
	available witness 77) three rows ove		is seated in the cu	bicle section		Employee?							
4201119	(1) shee rows ove	r Natry Howard.				Interviewed?							
						First Aid Administe	sred?						
						Injured Person Hospitalize	rd?						

Add losses and recoveries associated with an involved entity

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

Cancel					
inked Person	Employee Number		Involvement Type	Associated Losses	
🗟 Brown, Jeff 🛛 📫 🔀	ADMIN-77		Witness	Exposure	\$ 0.00
	Title First Name	Initial	Last Name	Averted Loss	\$ 1,400.00
	Mr. 🕶 Jeff	L	Brown	Total Loss	\$ 170.00
	Date of Birth		gnation(s)	Total Recovered	\$ 80.00
	03/27/1980 : III Gender	Marital Sta	1	Net Loss	\$ 90.00
4 2 4	Male -	Divorced		A second	And Recoveries
A state of		Color	Height Weig		And Recoveries
8 5	Brown V Blue			6 lbs	
Employee?	Notes				
Interviewed?	The only available witness is Jeff Br (ADMIN-77) three rows over Kathy I		seated in the cubicle section	*	
First Aid Administered?	(in the second s				
🗆 Injured					

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.

OK	Close	Add Loss	Add Recovery	Add No Impact	Edit	Remove		
Date Type		Туре	Method/Status/Cause			Loss	Recovery	No Impact
01/23/2012 Direct		ect	Method1/Lost/Accident			\$ 90.00 USD		
01/23/20	12 Red	coveryType1	RecoveryMethod2/Reco	overyType1			\$ 80.00 USD	
01/23/20	12 Dire	ect	Method1/Stolen/Accider	ıt		\$ 80.00 USD		
01/25/20	12 Ave	erted	Method1/					\$ 1,400.00 US

- 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.
- 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.

OK Ch	ose Add Loss	Add Reco	very Add N	o Impact Edi	it Remove		
Date	Type	N	lethod/Status/Cause		Loss	Recovery	No Impact
01/23/2012	Direct	Method1/Lost/A	ccident		\$ 90.00 USD		
01/23/2012	RecoveryType1	RecoveryMethy	d2/RecoveryType1	Ú.		\$ 80.00 USD	
01/23/2012	Direct	Method1/Stoler	Accident		\$ 80.00 USD		
01/25/2012	Averted	Method1/					\$ 1,400.00 U
							• • • • •
c da	Employee Number		Involvement	Type	Associated Losses		_ i
.	ADMIN-77		Witness	Tirpe	Associated Losses Exposure		5 0.00
	ADMIN-77 Title First Norm		Initial Last Name	Type		5	_ i
•>	ADMIN-77 Title First Norm Mr Jeff		Initial Last Name L Brown	Type	Exposure	s 5 1,	s 0.00
•?	ADMIN-77 Tele Finit Name Mr Jeff Date of Bith	•	Initial Last Name	Type	Exposure Averted Loss	5 5 1) 5	s 0.00
•>	ADMIN-77 Tele Finit Norm Mr. + Jeff Date of Birth 03/27/1980	: • ×	Witness Initial Last Name L Brown Designation(s)	Type	Exposure Averted Loss Total Loss	5 5 1, 5 5 5	5 0.00 400.00 170.00
•>	C ADMIN-77 Title First Norm Mr. + Jeft Date of Birth 03/27/1980 Gender	• : ••• × Ma	Initial Last Name L Brown Designation(s)	Type	Exposure Averted Loss Total Loss Total Recovered Net Loss	5 5 1, 5 5 5 5	\$ 0.00 400.00 170.00 80.00
•>	ADMIN-77 Tele Finit Norm Mr. + Jeff Date of Birth 03/27/1980	• : ••• × Ma	Initial Last Name L Brown Designation(s) attal Status verced	Type	Exposure Averted Loss Total Loss Total Recovered Net Loss	5 5 1, 5 5 5	\$ 0.00 400.00 170.00 80.00

- 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.

Gener	al 🔷 Involven	nents Narrative	s Attachments	♦ Links	Losses Investigation	on 🔷 Controls	Audit History					4
Persons	Organizations	Vehicles Items	\$									
Involved	Person: 2											
• <u>Add I</u>	<u>New</u> = <u>Edit</u>	• <u>Remove</u> • <u>G</u>	io to									
۴	Linked Person	Last Name	First Name	Initial	Involvement Type	Date of Birth	Gender	Employee?	Interviewed?	Person Loss?	Notes	
	Brown, Jeff	Brown	Jeff	L	Witness	03/27/1980	Male	V			The only availab	
	Hatfield, Carmen	Hatfield	Carmen		Complainant	04/20/1981	Female	Π		Π	Reported servic	
	Hatricia, Carmon	Hamola	Currien		Complandin	04/20/1001	remaie				ricpontou	301110

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

🖶 Add New Record				x
OK Cancel				
Linked Organization Metropolitan Police Metropolitan Police Services	Organization Name Metropolitan Police Service Organization Number C-9870-D Notified By Control Center Contact Person Image: Armando, Luis	Involvement Type Responding Service/Agency ▼ Organization Type Municipal Agency ▼ Reference Number H-9870 Contact Phone 780 555 0123	Associated Losses Exposure Averted Loss Total Loss Total Recovered Net Loss View Losses And Recoveries	
Comments Responding Officer: James T. Dole, B	adge #445.			•

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.
- Select the record of the person who has been administered the request from the "Request Assigned To Person" pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.
- 6. When the action is complete, input the **Completed Date**.
- 7. Add any necessary **Notes**.

		Û
Request Type	Tracking Number	
Request Assigned To Person		
Notes		

Log the involved organization's response to the incident

- 1. Open the "Click to Add Response Details" link.
- 2. Select the record of the person in the organization who responded to the incident from the **Responding Person** pick list. If a Person record does not already exist for the individual, use the Quick Add function to create one.
- 3. Select the record of the person who called the organization from **Notified By Person**.
- 4. Enter the date and time the organization was contacted in the Called Date/Time field.
- 5. Enter the date and time the organization arrived on site in the **Arrived Date/Time** field.
- 6. When the organization's response is complete and they have vacated the site, enter the completion date and time in the **Cleared Date/Time** field.
- 7. Click the **Calculate Time** link to determine how long it took the organization to respond (Response Time) and how long they remained on site (Time On Site).

- 8. Add any useful **Response Notes**.
- 9. Click OK.



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

General A Involvements	larratives Attachments 🔶	Links 🔶 Losses Inve	stigation 🔶 Control	Audit History			••
Persons Organizations Vehicles	Items						
Involved Organizations: 2							
Add New Edit Remove	= <u>Go to</u>						
Linked Organization Organ	nization Name Involvement Ty	pe Organization Number	Organization Type	Notified By	Comments	Organization Loss?	
Cape Breton Regional Police Cape B	reton Regiona Responding Serv	ic	Municipal Agency	Investigator		~	
Metropolitan Police Service Metropo	litan Police S Responding Serv	ic C-9870-D	Municipal Agency	Control Center	Responding Offi	Π	
Metropolitan Police Services	Organization Name Metropolitan Police Service Reference Number H-9870 Organization Type Municipal Agency Notified By Control Center	Contact Phone 780 555 0123 Organization Number C-9870-D Involvement Type Responding Service/Agency Contact Peson Armando, Luis	Responses: Request: 0	0			

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.
- 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.

🖶 Add New Record			
OK Cancel			
Linked Vehicle	License Plate	Involvement Type	Associated Losses
🗓 UDK665 🛛 🖶 🗙	UDK665	Suspect ·	Exposure
	Disposition	Year	Averted Loss
	Towed/Impounded *	2008 🗘	Averted Loss
	Make	Style	Total Loss
	Honda 👻	4 Door Sedan 👻	Total Recovered
	Model	Color	Net Loss
💁 😵 📥 💼 👘	Ridgeline 💌	Red 💌	View Losses And Recoveries
	VIN	Vehicle Value	View Losses And Recoveries
Company Vehicle?	4LUKPI22222M33333	\$40,000.00 USD	
Country Canada v State\Province Alberta v	Driver Identified Vehicle Driver Icd Brown, Rosie	₽ X	
Comments Abandoned on premises. Stolen items f	ound inside.	•	-

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.

Involved Vehicles: 1					
Add New Edit Remo	ve Go to				
Linked Vehicle Licens	e Plate Involvement Type	Year Make / Model	Vehicle Loss?	Comments	
JDK665 - Honda/Ridgeline UDK66	5 Indirectly Involved	2007 Honda/Ridgeline		Abandoned on premises. Stolen items.	
	License Plate UDK665	Style 4 Door Wagon			
	UDK665 Year 2007 Involvement Type	4 Door Wagon Disposition Towed/Impounded Color			
	UDK665 Year 2007	4 Door Wagon Disposition Towed/Impounded			

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.
- 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.

Add New Record			x
OK Cancel			
Linked Item	item Name	Associated Losses	*
🗷 Laptop Computer 🛛 📫 🗙	Laptop Computer	Exposure	
	Serial Number	Averted Loss	
	XTP-400S	Total Loss	
	Disposition		
Aurora 2 100 1 (process)	Seized As Evidence 👻	Total Recovered	Ε
" magazonnikisistia "	Item Value	Net Loss	
🖳 🔕 👘 🖳 🖳	\$2,135.00 USD	View Losses And Recoveries	
Item is Evidence?		View Losses And Recoveries	
Item Category	Item Make		
Corporate Property	Dell -		
Item Type	item Model		
Laptop v	Inspiron E1705		
Owner Identified/Known? Organization Owned By C TML Inc	Person Owned By		
lotes ocated at the cubicle ADMIN-78.	*		
	Ŧ		-

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.

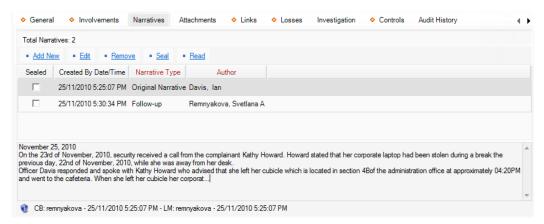
♦ General ♦	Involvements	Narratives Attachments	Links Loss	es Investigation	♦ Controls	Audit History	+ +
Persons Organia	zations Vehicles	Items					
Involved Items: 1							
= Add New =	Edit Remove	e Goto					
Linked Item	Item Name	Category / Type	Disposition	Item is Evidence?	Item Loss?	Notes	
Laptop Computer	Laptop Computer	Corporate Property/Laptop	Seized As Eviden	ce 🔽	Γ	Located at the cubicle	
1.000		Item Name	Category / Ty				
		Laptop Computer	Corporate Pr	operty/Laptop			
100		Item Value	Make / Mode	4			
		2,135	5.00 Dell/Inspiror	E1705			
·	-	Disposition	Serial Numbe	r			
	Ę	Seized As Evidence	XTP-400S				
ŵ ·							
v							

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**.

Drag and drop file	s below			- or -	Browse
Remove	Attachment Title	Attachment Type	Include when printing?	(Description
Remove Attachment Title					1
Attachment Type	•	Include when printing	?		
File Name File Extension File Size					

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.

♦ General ♦ I	nvolvements 🔷	Narratives 🔶 Att	achments <	Links	 Losses 	Investigation	 Controls 	Audit History	4
• <u>Add New</u> • <u>B</u>	Edit Remove	• <u>View</u>							
Total Attachments: 2									
Attachment Title	Attachment Type	File Name	File Extension	File Size	Description				
Original narrative	Document	orig_narrative	.txt	1 KB	Original narra	ative of the incide	nt (by Kathy Hov	vard).	
Dell Inspiron E1705	Picture	dell_inspiron_e1705	jpg	28 KB	Photo of the s	tolen laptop.			
o CB: remnyakova	- 26/11/2010 10:48	3:06 AM - LM: remnyako	ova - 26/11/2010	11:07:45 A	М				

Link the incident to an activity

- 1. Select the Links tab.
- 2. In the Activity Links section, click Add New. A pop-up window will open.
- 3. Specify how the incident and activity are related in the **Link Type** field (e.g., Common Call Source, Common Location).
- 4. Select the appropriate activity from the Linked From Activity pick list.
- 5. Indicate the date that the incident became associated with the activity in the Link Effective **Date** field.
- 6. Type any additional information about the link in the **Notes** field.
- 7. Click OK.

🖶 Add New Record		_ • •
OK Cancel		
Link Type Common Call Source Link Effective Date 24/08/2011 : IIII X	Linked From Activity	÷
Notes Common Call Source: Phone 780 555 66	677 (Officer D. Clark)	*
		Ŧ

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

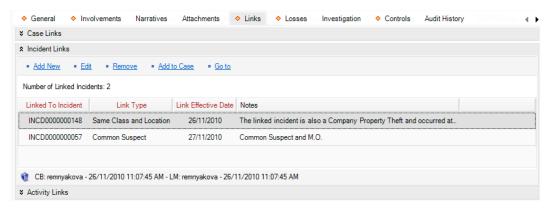
♦ General ♦ I	nvolvements	Narratives	Attachments 🔷	Links 🔷 Los	ses Investigation	 Controls 	Audit History	
¥ Case Links								
Incident Links								
☆ Activity Links								
Add New	Edit Remo	ove <u>Go to</u>						
Number of Linked Ac	tivities: 2							
Linked From Activi	ty Li	nk Type	Link Effective Date	Notes				
ACT-2011-000015	Escalated	to Investigation	18/05/2011					
ACT-2011-000129	Common	Call Source	24/08/2011	Common Call S.	-			
@ -								

Link an incident to another incident

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

🖶 Add New Record	
🛛 🛷 OK 🛛 🙆 Cancel	
Link Effective Date 26/11/2010	+
Notes The linked incident is also a Company Property Theft and occurred at the Site A, Building 1, Location 1.	▲ ▼

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**.
- 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.

Add New Record		×
🛛 🛷 OK 🛛 🔀 Cancel		
Link Type Related Incidents	Linked To Case	
Link Effective Date		
Notes		
The incidents have identical involved	persons and location.	

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.

🕂 Add New Record	- • •
V OK S Cancel	
Link Type Linked From Case Common Person Link Effective Date 22/12/2010 : IIII X	+
The case is built around a common person.	A

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

Perspective User's Guide

= <u>Add New</u> = <u>E</u>	dit = <u>Remove</u> = (<u>Go to</u>	
Number of Linked Ca	ses: 3		
Case Number	Link Type	Link Effective Date	Notes
CASE-2010-000027	Common Organization	01/12/2010	Similar theft pattern.
ADMC-2009-000124	Common Organization	07/01/2011	The case contains related incidents that occurred in the common organization.
CASE-2009-000058	Common Person	22/12/2010	The case is built around a common person.
CB: remnyakova	- 26/11/2010 12:31:22 Pi	M - LM: remnyakova -	26/11/2010 12:31:22 PM
Incident Links	- 26/11/2010 12:31:22 PI	M - LM: remnyakova -	26/11/2010 12:31:22 PM

Record losses involved in an incident and view their summary

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

- Loss: A monetary loss that occurred in the course of the incident.
- **Recovery**: A loss amount associated with an incident that has been restored or regained as a result of an action that had been implemented after the incident took place.
- **No Impact Loss**: A loss that has been associated with an incident that has either been prevented or remains a potential loss and, hence, does not impact the Net Loss amount.
- To add a loss, open the Losses tab and click on the Add Loss, Add Recovery or Add No Impact hyperlink 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.
- Identify the nature of the loss under Loss Type (e.g., Direct or Indirect, Averted or Exposure).
- 7. If applicable, specify the reason for the actual or the potential loss you are recording under **Loss Cause** (e.g., Accident, Deliberate or Unintentional Act).
- 8. If you are recording a loss that has actually occurred, determine the current state of the lost unit(s) under **Loss Status** (e.g., Compromised, Lost, Stolen or Damaged).
- 9. Under **Method**, select a descriptor that best defines the way in which the loss occurred or can potentially occur (e.g., Wired Transfer or Cash).
- 10. For actual and no impact losses, select the name of the person who recovered the loss or defined the incident as incurring potential loss from the **Recovered/Determined By Person** pick list. By default, the field will contain the name of the person recording the loss.
- 11. If you are recording a recovery, also complete the **Recovered From Person** and the **Recovered From Organization** fields, as applicable.
- 12. Enter any additional comments under **Notes**.
- 13. Click **OK**. Once the changes are saved, the recorded loss data will populate the relevant columns of the **Losses** grid. For optimal analysis, you may arrange the loss entries by a column header (e.g., Associated To, Date or Type) and change the position of the columns in the grid.
- 14. Click **Save** to synchronize the recorded data within the relevant involvement records and update the summary calculations displayed to the right of the grid.
 - Total:

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

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

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

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

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

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

 General 	Involvemen	ts Narratives	Attachments	Links	♦ Losses	Investigation	 Controls 	Audit History		
Loss And F	Recovery Details								Total	
Incident Loss		ses:3 Recoveries: ery = Add Nolr		Remove					Total Exposure Total Averted Total Loss	\$ 2,125.00 USD \$ 790.00 USD \$ 8,442.00 USD
Date	/ v	Associated To	Туре	Method/Sta	atus/Cause	Loss	Recovery	No Impact	Total Recoveries	\$ 680.00 USD
01/19/2012	Inc.dents		Direct	ACH/Stoler	n/Deliberat	\$ 2,492.00 US			Net Loss	\$ 7,762.00 USD
02/15/2012	Item Involvem	Wallet	Direct	Wired Tran	sfer/Lost/A	\$ 3,225.00 US			Losses Direct	\$ 5,717.00 USD
01/25/2012	Organization I	Cape Breton Re	On-line Purcha	Merchant C	Credit		\$ 80.00 USD		Indirect	\$ 2,725.00 USD
01/30/2012	Organization I	Sydney Police S	Exposure	Cheque/Sto	olen/Intenti			\$ 2,125.00 USD	Recoveries Physical	\$ 600.00 USD
01/25/2012	Person Involve	Brown, Jeff	Indirect	ACH/Lost/I	ntentional	\$ 2,725.00 US			On-line Purchase	\$ 80.00 USD
02/23/2012	Person Involve	Hatfield, Carme	Averted	Cash/Unint	tentional -			\$ 790.00 USD	No Impact	
02/24/2012	Vehicle Involve	UDK665	Physical	Wright-off			\$ 600.00 US	former law	Exposure Averted	\$ 2,125.00 USD \$ 790.00 USD
								1		

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.

General					
nvestigation Initiated					
💐 Davis, lan	🖶 🗡	Total Time Spent:	0 Hrs.		
nvestigation Start Da	ate	Total Expenses:	\$ 0.00 USD		
23/11/2010	: 🔳 🗙	Total Evidence:	0		
nvestigation Last Re	view Date	Number of Interviews:	0		
09/12/2010	: 💷 🗙				
nvestigation Closed I	Date	Number of Investigators:	0		
15/12/2010	: 💷 🗙	Investigation Duration:	3 day(s)		
			<u>Update</u>		
nvestigation Commer	eta				
		Officer Mairon Alvarez. Then, it was pass	sed on to Officer lan		
Davis.					
			*		

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.

nvestigator Type		Investigator		
Lead Investigator	•	🖾 Davis, lan	÷	×
Assigned Date		Completed Date		
23/11/2010 12:00 PM	: 🔳 🗙	_/_/::	_ : 🎟	×
Comments				
he investigation was p ncident was reported.	assed on to [)avis on the same dat	e as the	*

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

General	naries Logs Inter	views Evidenc	e/Property					
Investigators								
 Add New 	 Edit Remove 							
Total Investigato	ors: 3							
Assigned Date	Investigator Type	Investigator	Completed Date	Comments				
23/11/2010	Lead Investigator	Davis, Ian		The investigat	ion was passed on	to Davis on the sam	e dat	
	Assisting Investigator	Adams, Abbott						
16/08/2011			26/11/2010	Officer Campb	ell's involvement in	the investigation wa	as ter	
16/08/2011 24/11/2010	Assisting Investigator	Campbell, Keith						

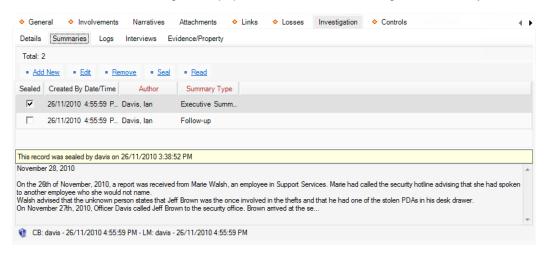
- 9. Click Save. An Auto Notification pop-up window will appear.
 - To send an email notification of the assigned investigation to the investigator, ensure the appropriate checkbox is selected and click Send. Notifications are automatically sent in HTML. De-selecting the Send Formatted box, prior to 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.

1		d, ensure the appropriate checkboxes are selected and click Send. exit this window without sending any information.
	Туре	Send Notification To
V	Assigned Investigation	Davis, Ian (idavis@ppm2000.com)
	Assigned Investigation	? Campbell, Keith (Email cannot be sent.)

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.
- 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.

🖶 Add New Record	_	
V OK 🛛 🔞 Cancel		
Task Type Task Done By Person General Investigation ▼ ICQ Davis, Ian Expense Type Task Date	• • X	
Administrative v 26/11/2010	: 💷 🗙	
Expense Amount Time Spent S120.50 CDN 10 Hrs. Follow-up Required?	. 30 💭 Min.	
Log Notes		
Background checks.	*	
	-	

Add New Edit	Remove						
otal: 3	Task Date	Task Type	Task Done By Person	Time Spent	Expense Type	Expense Amount	
	25/11/2010	General Investig	-	8.0 hrs	Expense Type	\$ 0.0 USD	
V	26/11/2010	Interview	Davis, Ian	2.0 hrs	Administrative	\$ 5.5 USD	
Γ	26/11/2010	General Investig	Davis, Ian	10.5 hrs	Administrative	\$ 120.5 USD	

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.
- 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.

				Interview Editor		_ = ×
Interview I	mport/Export	Tools Spelli	ing			
Accept & Cancel & Return Return Document		□ Image: Constraint of the second	B I U ♥	Normal Page Style Text Style		ow/Hide Fields
Interview Type Interview		Subject of Interview		ject's Involvement Type oject of Interest	Interview Conducted by	
Start Date / Time 27/11/2010 10:30 AM		End Date / Time 27/11/2010 12:30 PM		ation of Interview urity office, Interview room #1	Witness White, Pamela - Badge 335	✓ Interview Recorded
		i≡ i ≡ ⊡ ¶ 10		•		
	L · · · F · · · L	P		view Report	. ı 4 l ⁷ ı l ⁸	P
		Date of Intervi Time of Interv Location of In Interviewer: Interviewee:	iew:	November 27, 2010 10:30 AM Security office, room #1 Ian Davis Jeff Brown		
nterview Narrative:					ion 1 in Building A this month. Is	this true?

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.

Details	Summaries Lo	ogs Interviews E	vidence/Property				
		-)					
 Add Ne 	<u>ew</u> = <u>Edit</u>	<u>Remove</u> <u>Seal</u>	Read				
Total: 1							
ealed	Interview Type	Subject of Interview	Subject's Involvement Type	Interview Conducted by	Start Date / Time	Interview Recorded?	
🗌 Ir	nterview	Brown, Jeff L	Subject of Interest	Davis, Ian	27/11/2010 10:30 AM	V	
ate of Inte	rview:		Interview Report				
	27, 2010 rview: Interview: ce, room #1		Interview Report				

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).

- 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.
- 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.

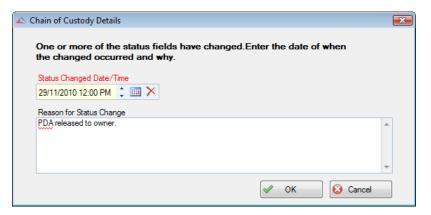
Record				
OK 🔯 Cancel				
Details				
	Owner Name Person	27/11/2010 1 Found / Seize	ed Location Rrown, ADMIN-77 rison an E Person	x
	Noton			
	Notes PDA seized from Jeff Brown's desk d	rawer. Returned to owne	r.	*
Current Status	PDA seized from Jeff Brown's desk d			4
Current Status Evidence Status Unsecured		rawer. Returned to owner		A T
Evidence Status	PDA seized from Jeff Brown's desk of Disposition Released to Owner Evidence / Property Tag			× v
Evidence Status Unsecured Person In Possession	PDA seized from Jeff Brown's desk of Disposition Released to Owner Evidence / Property Tag	Secured / Storage Lo		ustody.
Evidence Status Unsecured Person In Possession IC Howard, Katheri	PDA seized from Jeff Brown's desk of Disposition Released to Owner Evidence / Property Tag	Secured / Storage Lo	Cation	
Evidence Status Unsecured Person In Possession I Howard, Katheri	PDA seized from Jeff Brown's desk of Disposition Released to Owner Vidence / Property Tag 06-T4563	Secured / Storage Lo	Cation	

♦ General ♦ Involven	nents 🔶 Narratives	♦ Attachments ♦ Lir	nks 🔶 Losses	 Investigation 	 Controls 	Audit History ∢
Details Summaries Lo	ogs Interviews Evide	nce/Property				
• Add New • Edit	<u>Remove</u>					
Total: 1						
Evidence / Property Name	Evidence / Property Tag	Evidence / Property Type	Found / Seized Date/Time	Disposition	Evidence Status	
Recovered Missing PDA	06-T4563	Found	27/11/2010 12:00 PM	Released to Owner	Unsecured	
	Evidence / Property Nam Recovered Missing PD Notes	A				
	PDA seized from Jeff B	rown's desk drawer. Return	ed to owner.			

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.

Evidence / Property Name Found / Seized Date/Time Recovered Missing PDA 27/11/2010 12:00 PM Evidence / Property Type Found / Seited Location	
Recovered Missing PDA 27/11/2010 12:00 PM :	
Current Status	.
Evidence Status Disposition Secured / Storage Location	
Secured Released to Owner	
Person In Possession Evidence / Property Tag B Howard, Katheri + X 06-T4563	
Chain of Custody 🛛 🖶 Print 🥏 Update Chain	of Custody
Status Changed D Evidence Status Disposition Storage Person In Pos Evidence / P Reason for S	tatus Change 🛛 /
29/11/2010 Unsecured Released t Howard, Kath 06-T4563 PDA released	to owner.
07/06/2011 Secured Released t Howard, Kath 06-T4563 The evidence	has been re-clai

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.

 ♦ General ♦ Involvements ♦ M Details Summaries Logs Intervie 	larratives Attachments ews Evidence/Property 	♦ Links ♦ Losses	 Investigation 	••
* General				
Investigation Initiated By Person	Total Time Spent:	20.5 Hrs.		
Investigation Start Date	Total Expenses:	\$ 126.00 CDN		
23/11/2010	Total Evidence:	1		
Investigation Last Review Date	Number of Interviews:	1		
09/12/2010 : III X	Number of Investigators:	4		
15/12/2010	Investigation Duration:	22 day(s)		
		<u>Update</u>		
Investigation Comments The investigation was initially assigned to Davis	Officer Mairon Alvarez. Then, it was p	bassed on to Officer lan		
Dovis.				
		-		
✤ Investigators				

Control a record's processing options

Set the security controls and status of a record

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

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

- 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.

♦ General ♦ Involvements	♦ Narratives ♦ Attachments	◆ Links ◆ Losses ◆ Investigation ◀ ●
Details Outcome Reviews	Assignments	
☆ Controls		
Org Level 1	Access Level	
North America	Level 3	 Archive (Record is not visible)
Org Level 2	Status	Record Owner
Canada	▼ Open	🛛 🖾 Abrams, Terry
Org Level 3	Disposition	
Alberta	 Under Investigation 	
Org Level 4	Expiry Date	
Edmonton	24/11/2011 : 💷 🔀	
¥ Workgroup Visibilities		

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.

Workgroup	Update	None	-
Workgroup A			
Workgroup B			
Workgroup C		V	
▶Ø Workgroup D	V		
Workgroup E			-

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

♦ General ♦ Involvements Na	arratives	Attachments	Links	♦ Losses	Investigation	 Controls 	Au 🔹 🕨
Details Outcome Reviews Assi	ignments						
* Controls							
☆ Workgroup Visibilities							
Owner Workgroup (Full Rights)		All Other Workgro	ups				
Ontario	-	Read		-			
Add Exception(s) X Remove							
Workgroup			Read		Update		
	up - Do not	delete	Read		Update		
Workgroup	up - Do not	: delete	Read		Update		

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**.
- 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.

ails Outcome Reviews Assignm	nents	
Policy Name:		
Corporate IT Security Policy	✓ Policy Affected	
Primary Cause	Secondary Cause	
Unintentional Act 👻	Careless Actions 🔹	
Corrective Action Summary		
	sk" on the lanton, as required by TSD-121	A
Complainant did not have the "desk loo		
Complainant did not have the "desk loo	e of desk locks when not attending desk.	

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.

🕂 Add New Record		
🛛 🛷 OK 🛛 😧 Cancel		
Review Type Departmental Review	Reviewed By Person	+
Review Date		
10/12/2010 01:20 PM 📫 🧮 🗙		
Comments		
Final review. Investigation closed.		*
		-

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

♦ General ♦	Involvements	Narratives 🔷 Attack	ments 🔷 A Links	♦ Losses	 Investigation 	 Controls 	Audit History 🔌 🕽
Details Outco	me Reviews Assi	gnments					
<u>Add New</u>	Edit Remove						
Total Reviews: 2	2						
Review Date	Review Type	Reviewed By Person					
10/12/2010	Departmental Review	Davis, Ian					
26/11/2010	Departmental Review	Davis, lan					
•							
1 - 1							

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.
- Complete the Assigned Date, and enter the date the assignment must be completed under Due Date.
- 7. When the assignment is finished, check the "**Completed?**" box and enter the appropriate date in the **Completed Date** field.
- 8. Enter notes or instructions in the Message/Task text box.

🖶 Add New Record		- • •
🖌 🛷 OK 🛛 😥 Cancel		
Assignment Type	Assigned By Person	
Information Request 💌	🖾 Davis, lan	+
Assigned Date	Assigned To Person	
24/11/2010 10:00 AM : 🎹 🗙	🖾 Campbell, Keith	+
Due Date		
25/11/2010 11:00 AM 门 🧮 🗙	Completed?	
Completed Date		
25/11/2010 01:00 PM 📫 🕅 🗙		
Message / Task		
Background check on Jeff Brown.		*
		-
		~

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

Add New	= <u>Edit</u> = <u>Rem</u>	ove Notify				
Total Assignmer	nts: 3 Completed	Assignments: 1				
Completed?	Assigned Date	Assignment Type	Assigned By Person	Assigned To Person	Message / Task	
	13/12/2010	Verification	Davis, Ian	Baker, Susan	Please, verify the necessary data has b.	
	23/11/2010	Follow-up Activity	Baker, Susan	Davis, Ian	Please, interview the complainant and o	
	24/11/2010	Information Request	Davis, Ian	Campbell, Keith	Background check on Jeff Brown.	

- 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.

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

- 11. Every time you add a new assignment to the Assignments list or edit the old one and click Save, the system will automatically prompt you to send an email notification about the changes made. However, if you 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**.

Send Attachments Priority Cut Copy Paste	ABC Check Ubject: Assignment Reminder (Incident Number: ADMI-2010-00
Mail Document Edit	Mail Properties Options ۱۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰۰
Assignment Details	
Assigned By	Davis, Ian
Assigned To	Campbell, Keith
Assigned Date	24/11/2010 10:00:00 AM
Due Date	25/11/2010 11:00:00 AM
Completed?	Yes
Completed Date	25/11/2010 1:00:00 PM
Message / Task	Background check on Jeff Brown.
Incident Details for ADMI-2010-000124	
Criminal/Theft/Company Property/Over \$100	0

Track changes made to a record

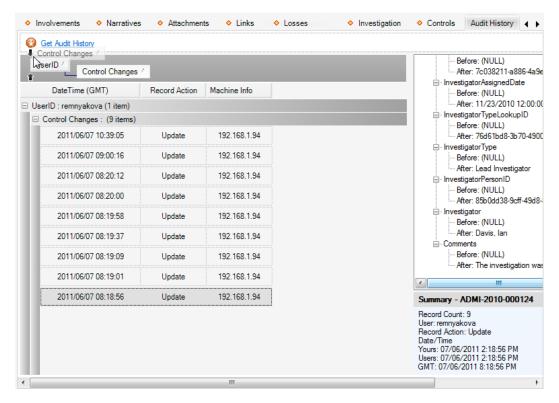
- 1. Select the Audit History tab.
- 2. Click **Get Audit History** to view all modifications made to the record since its creation. The Viewing pane will display entries for each change made to the record. Among the available data categories are the following:
 - DateTime indicates the time when the 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;

ag a blumn header l	nere to group by the	at column.			Before: (NULL)
DateTime (GMT)	UserID	Record Action	Control Changes	Machine Info	⊡ InvestigatorAssignedDate
2011/06/07 10:39:05	remnyakova	Update		192.168.1.94	After: 11/23/2010 12:0
2011/06/07 09:00:16	remnyakova	Update		192.168.1.94	⊡ InvestigatorTypeLookupID
2011/06/07 08:20:12	remnyakova	Update		192.168.1.94	After: 76d61bd8-3b70-4
2011/06/07 08:20:00	remnyakova	Update		192.168.1.94	Before: (NULL)
2011/06/07 08:19:58	remnyakova	Update		192.168.1.94	···· InvestigatorPersonID
2011/06/07 08:19:37	remnyakova	Update		192.168.1.94	After: 85b0dd38-9cff-49
2011/06/07 08:19:09	remnyakova	Update		192.168.1.94	Before: (NULL)
2011/06/07 08:19:01	remnyakova	Update		192.168.1.94	Comments
2011/06/07 08:18:56	remnyakova	Update		192.168.1.94	Before: (NULL) After: The investigation
					<
					Summary - ADMI-2010-000124
					Record Count: 9 User: remnyakova Record Action: Update Date/Time Yours: 07/06/2011 2:18:56 PM Users: 07/06/2011 2:18:56 PM GMT: 07/06/2011 8:18:56 PM

• *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 \blacksquare 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.

General 🔷 🔶	-	e 🔒 Lock 🖶 Print								
	Involvements	 Narratives Atta 	achments	 Links 	 Losses 	 Investigations 	 Controls 	Audit History		
etails									☆ Case Summary	
Case Number		Case Start Date							Status	Ор
CASE-2009-00	00002	04/01/2011 12:00 AM	1							ar(s) 6 month(s) 30 day
Case Name		Last Reviewed Date							Number of Case Investigators	
	estraining Order								Number of Linked Incidents	
Case Category		Case Closed Date							Initial Incident Occurred	8/11/2010 4:18:03 F
Criminal Event	nts								Disposition	
Case Manager		Case Supervisor								
Ko Value		R No Value							Investigation Summary	
									Total Time Spent	39 hr(s) 30 mir
Link New Inc	ncident Link	New Case							Total Expense	\$ 436.00 C
Case Description	on								Total Evidence	
Test									Number of Interviews	
									Number of Incident Investigators	
									Total Investigation Duration	1324.09 Day
									Number of Incidents Investigated	
									Incidents Not Investigated	
									_	
vestigators									* Involvement Summary	
ivestigators tal Investigators:	s: 1								Involvement Summary Number of Persons	
tal Investigators:								^	* Involvement Summary Number of Persons Number of Organizations	
tal Investigators: Add New =	Edit Remove							E	Involvement Summary Number of Persons Number of Organizations Number of Items	
tal Investigators: Add New = signed Date	Edit = Remove	stigator Type Complete						E	* Involvement Summary Number of Persons Number of Organizations	
tal Investigators: Add New = signed Date	Edit Remove	stigator Type Complete		ments tigating a p					Involvement Summary Number of Persons Number of Organizations Number of Items	
tal Investigators: Add New = signed Date	Edit = Remove	stigator Type Complete							Involvement Summary Number of Persons Number of Organizations Number of Items Number of Vehicles	
tal Investigators: Add New = signed Date	Edit = Remove	stigator Type Complete							Involvement Summary Number of Persons Number of Organizations Number of Items Number of Vehicles Loss Summary	\$ 0.00C
tal Investigators: Add New = signed Date	Edit = Remove	stigator Type Complete							Involvement Summary Number of Persons Number of Organizations Number of Items Number of Vehicles Loss Summary Total Exposure	\$ 0.00 C \$ 20.00 C
tal Investigators: Add New = signed Date	Edit = Remove	stigator Type Complete							Involvement Summary Number of Persons Number of Organizations Number of Items Number of Vehicles Loss Summary Total Exposure Total Averted Total Loss	\$ 0.00 C \$ 20.00 C \$ 109.589.00 C
tal Investigators: Add New = signed Date	Edit = Remove	stigator Type Complete							Involvement Summary Number of Persons Number of Organizations Number of Items Number of Vehicles Loss Summary Total Exposure Total Averted	

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.

_				
Ę	Add New Record			- • •
ł	🗸 OK 🛛 🙆 Cancel			
	Investigator Type	Investigator		
	Assisting Investigator 👻	🖾 Campbell, Keith	÷	×
	Assigned Date	Completed Date		
	24/11/2010 12:00 PM 🚺 🧾 🗙	26/11/2010 12:00 PM 🕻		×
	Comments			
	Officer Campbell has been dismissed of	due to the conflict of interest	ts.	*
				-

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

General	Involvements	 Narratives 	 Attachments 	 Links 	 Losses 	 Investigation 	 Controls 	Audit History
¥ Details						☆ Case Summary		
☆ Investigators						Status		Oper
Add New	= <u>Edit</u> = <u>Rer</u>	nove				Case Duration	1	9 month(s) 13 day(s
Total Investigato	uns: 2					Number of Case Invest	tigators	2
rotal investigate	no. 2		1	(Number of Linked Incid	dents	3
Assigned Date	Investigator	Investigator Type	Completed Date	Comments		Initial Incident Occurre	d 13/1	0/2009 5:32:04 PM
24/11/2010	Campbell, Keith	Assisting Investigate	or 26/11/2010	Officer Can	npbell has been disr	Disposition		Active
23/11/2010	Davis, Ian	Lead Investigator						
						* Investigation Sum	mary	
						Total Time Spent	65	hour(s) 50 minute(s
						Total Expense		\$ 426.00 USE
						Total Evidence		2
🍿 CB: davis - (01/12/2010 5:51:0	07 PM - LM: davis - 01.	/12/2010 5:51:07 P	M		Number of Interviews		3

- 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.

🖾 Aut	o Notification		×
-	the email addresses listed	een saved. To send any of the following auto-notifications to d, ensure the appropriate checkboxes are selected and click Send. exit this window without sending any information.	
	Туре	Send Notification To	
	Assigned Investigation	P Campbell, Keith (Email cannot be sent.)	
	Assigned Investigation	Davis, Ian (ian_davis@advancedsecurity.com)	
Sele	e <u>ct All</u> <u>Deselect All</u> Ser	nd Formatted 🔽 Close Send	

View all case's involvements

- 1. Open the **Involvements** tab.
- Depending on the type of involvement data required, select the Persons, Organizations, Vehicles or Items sub-tab. A list of all corresponding entities contained in the case's linked incidents, as well as their essential details, will appear in form of a grid.
- 3. Select an entity in the grid to display its details in the form at the bottom of the window.
- 4. To view the history of the entity's involvements, select the entity in the grid, and click **History**. All incidents the entity has been involved in will be displayed in a pop-up window.

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

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

<u>History</u> <u>Go to Pe</u>	rsons •	Go to Incider	<u>nts</u>						
nvolved Person(s): 3	Employee(s):3 In	terviewed:	3					
Incident Number	ast Name	First N	Name	Involvement	t Type Birthdate	Gender	Employee	Interviewed	
ADMI-2010-000124 How	ard	Katherine	e V	lictim	03/06/1983	Female	$\overline{\mathbf{v}}$		
INC-2009-000265 And	erson	Peggy Su	Je R	Reported By		Female		\checkmark	
ADMI-2010-000124 Brov	vn	Jeff	M	Vitness	26/03/1980	Male	V	V	
1	Title Mr. Birthdate	First Nam Jeff	e Gender	Initial L	Last Name Brown Marital Status	Involvement Type Witness Designation(s)			
100	Mr.	Jeff	-		Brown				
	Mr. Birthdate	Jeff 980	Gender	L	Brown Marital Status	Witness			
Notes	Mr. Birthdate 26/03/19 Hair Cold	Jeff 980	Gender Male Eye Color	L	Brown Marital Status Divorced	Witness			
Notes The only available with section (ADMIN-77) three	Mr. Birthdate 26/03/19 Hair Colo Brown	Jeff 980 or rown who is	Gender Male Eye Color Blue seated in th	r	Brown Marital Status	Witness			
Notes The only available with	Mr. Birthdate 26/03/19 Hair Colo Brown	Jeff 980 or rown who is	Gender Male Eye Color Blue	r	Brown Marital Status Divorced	Witness Designation(s)			

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.

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

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

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

Link a case to another case

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

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

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

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

♦ General ♦	Involvements	♦ Narratives ♦ A	ttachments 🔶 Links	♦ Losses	 Investigation 	 Controls 	Audit History			
* Linked Inciden	is									
Linked Cases	Linked Cases									
Add New	= Add New = Edit = Remove = Go to									
Number of Linke	d Cases: 2									
Linked From Ca	se Linked To C	ase Link Case Name	e Link Type	Link Effective Date	Notes					
CASE-2010-000	028 CASE-2010-00	0027 Internal Thefts	Common Suspect	02/12/2010						
CASE-2010-000	027 ADMC-2010-00	00016 4534534	Same Class and Location	01/12/2010	Both cases involve th	eft at the s				
🔞 CB: davis - 0	1/12/2010 5-19-25 6	PM - LM: davis - 01/12/2	010 5-19-25 PM							
UCD. udvis - u	1/12/2010 3.13.231	M - LM, 04VIS - 01/12/2	010 J.13.231 M							

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.

Loss And Recove										* * **** ***
Total Incidents:4 In	cident With L	osses:2 Losses:4 R	ecoveries:2 No Imp	act:2					Total Exposure	\$ 2,125.00 US
									Total Averted	\$ 790.00 US
 Go To Incident 									Total Loss	\$ 9,753.78 US
IncidentID	Date	T	Associated To	Туре		Loss	Recovery	No Impact	Total Recoveries	\$ 680.00 US
									Net Loss	\$ 9,073.78 US
INCD000000167	01/19/201	Incidents		Direct	\$	2,492.00 USD			Averages	
SHI-2011-000018	01/27/2011	Item Involvement	Car Stereo	Direct	\$	1,311.78 USD			Average Exposure	\$ 531.25 USI
INCD000000167	02/15/2012	Item Involvement	Wallet	Direct	s	3.225.00 USD			Average Averted	\$ 197.50 US
									Average Loss	\$ 2,438.45 US
INCD000000167	01/25/2012	Organization Inv	Cape Breton Re	On-line Purc			\$ 80.00 USD		Average Recoveries	\$ 170.00 US
INCD000000167	01/30/2012	Organization Inv	Sydney Police S	Exposure				\$ 2,125.00 USD	Average Net Loss	\$ 2,268.45 US
INCD000000167	01/25/2012	Person Involve	Brown, Jeff	Indirect	\$	2,725.00 USD				
INCD000000167	02/23/2012	Person Involve	Hatfield, Carmen	Averted				\$ 790.00 USD		
INCD000000167	02/24/2012	Vehicle Involve	UDK665	Physical			\$ 600.00 USD			

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.

a	ils Summaries	Logs Intervie	ws Ev	idence/Propert	у						
Ge	eneral										
3	Go to Incidents										
	al Number of Investig	gations: 2 To	tal Durati	ion: 98.57 day(s) Average Dur	ration:	49.28 day(s)				
	Incident Number	Start D	ate	Initiated By	Review Dat	te	Close Da	te	Investigation Duratio		
ľ									-		
	ADMI-2010-0001	24 23/11/20	J10 L	Davis, lan	09/12/2010	0	15/12/201	0	22.0 day	(s)	
	MPDI-000000085 24/03/20		011 S	Smith, Jane					76.57 day	(s)	
	nked Incident Invest	-									
	nked Incident Invest al Number of Investig	-	Nur	nber Investigato	ors Involved: 4						
		-		nber Investigato	ors Involved: 4 Investigator	Cor	npleted Date	Comr	nents		
oti	al Number of Investig	ators Assigned: 5	Invest	igator Type △			mpleted Date 26/11/2010		nents rr Campbell's involvem	L.	
ota	al Number of Investig IncidentID	ators Assigned: 5 Assigned Date	Invest Assisti	igator Type △	Investigator			Office			
ota	al Number of Investig IncidentID ADMI-2010-0001	ators Assigned: 5 Assigned Date 24/11/2010	Invest Assistin Lead In	igator Type ∕ ng Investigat	Investigator Campbell, Keith			Office	r Campbell's involvem		

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.

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

Investigation Summary

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

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

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

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

Involvement Summary

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

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

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

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

Loss Summary

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

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

Track changes made to a Case record

Open the **Audit History** tab and complete the operation, as described in the "Track changes made to a record" 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.
- 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.
- Depending on the category specifications selected for the activity, the system will build the appropriate activity Code. Alternatively, you may quickly enter the code to auto-populate the activity category Levels.
- 6. Specify the **Priority** for the activity selecting from the lookup options. The default value in the Priority field is determined by the category specifications/code selected for the activity.
- If the activity has been closed, enter the date of its closure in the Closed Date/Time field. For the Activity records that have previously been closed within the DispatchLog, this field will already contain the date of closure.

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

- 8. Specify the location of the activity by making selections from the **Site**, **Building**, **Location** and **Section** lookup lists.
- 9. The address fields (i.e., Address, Address 2, Postal Code, Country, State/Province and City) will automatically populate according to the site specifications entered. Alternatively, you may enter/edit the address manually. If the activity took place off site, mark the corresponding checkbox and enter the exact address of the off-site activity location.
- 10. In the **Description** text field, type in a detailed description of the activity.

Site		Address	Country	
Acme University	-	3 Main Street	Canada	
Building		Address 2	State\Province	
Administration Building	-		Alberta	
Location		Postal Code	City	
East Wing	-	T5H 1Y6	Edmonton	
Section				
Front Entrance	-	Off Site		
Employees working in Level	7/Section	ost staff had evacuated the buildin 12 discovered that their fire exit w an exit. This delayed their evacua	as locked, so they had to walk	

- 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.

Call Source		Call Taken By		Dispatched By	
External Caller - Cell	-	Baker, Gordon	🖶 🗙	Davis, Ian	🖶 🗙
External Caller - Cell	•	SQ Baker, Gordon			
Contact Number		Initiated By			
780 555 4444		🖾 Zeyen, Jeff			

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

Activity Notes	
Activity has been closed.	
	Add Notes (Ctrl+Enter)
	2
Activity requires further information.	*
- Admin (May 19, 2011 13:31:48)	
Investigation pending.	
- Admin (May 19, 2011 13:19:43)	
Activity has been reported.	
- Remnyakova, Svetlana A (May 19, 13:18:27)	2011
	-

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

/ OK 🛛 😧 Cancel		
Officer Name	Call Sign	
Norton, John 🛛 🖶 🗙	130C	Ŧ
Assigned Date/Time		
19/05/2011 10:00 AM : 🏢 🗙	Abandoned	
Start Date/Time		
19/05/2011 10:00 AM : 🏢 🗙		
Arrived Date/Time		
19/05/2011 10:05 AM : 🏢 🗙	Response Time	0 hrs 5 mins
Cleared Date/Time		
19/05/2011 11:00 AM : 🏢 🗙	Time On Site	0 hrs 55 mins
Officer Response Notes		
Conducted evacuation of staff from the	e building.	*
		-

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

♦ General	Responses	Requests	♦ Inve	olvements	Attac	hments	Links	 Control 	ols Au	idit History	
Officer Response	s Organization	Responses									
<u>Add New</u>	Edit Rem	iove									
Total: 2											
Officer Name	Call Sign	Assigned [Date/Time	Start Date/	Time	Arrived Da	te/Time	Cleared Da	ate/Time	Response Time	Time On Site
Norton, John	130C	19/05/2011	10:00 AM	19/05/2011	10:	19/05/2011	10:05	19/05/2011	11:00	0.08 hrs	0.92 hrs
Durov, Alex	135A	19/05/2011	11:30 AM	19/05/2011	12:	19/05/2011	12:20	19/05/2011	12:50	0.17 hrs	0.5 hrs
Conducted evacua	ation of staff from t	he building.									

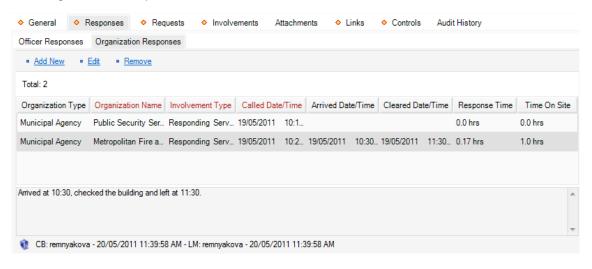
Record an organization's response to an activity

- 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.
- 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.

🖉 OK 🛛 😧 Cancel		-
Organization	Organization Name	Involvement Type
🗟 Metropolitan Fire an 🖶 🗙	Metropolitan Fire and Rescue Service	Responding Service/Agency -
	Organization Number	Organization Type
m	C-9971-L	Municipal Agency 👻
S STOLLER	Notified Type	Reference Number
	Control Center 👻	FR-378
	Contact Person	Contact Phone
	🗓 Dalton, Trevor 🛛 🖶 🗙	
Responding Person	Notified By Person	
Dalton, Trevor Image: Called Date/Time 19/05/2011 10:20 AM Arrived Date/Time	 ☑ Baker, Gordon ☑ No Responses 	
Dalton, Trevor X Called Date/Time 19/05/2011 10:20 AM X Anrived Date/Time 19/05/2011 10:30 AM X X	 Baker, Gordon Baker, Gordon No Responses 	s) 10 min(s)
Dalton, Trevor Image: Called Date/Time 19/05/2011 10:20 AM Arrived Date/Time	Baker, Gordon Baker, Gordon Age X No Responses Response Time O hr(s	

- 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.

Add New Record		
🖉 OK 🛛 🔞 Cancel		
Organization	Organization Name	Involvement Type
🖳 Campus Security 🛛 🖶 🗙	Window Glass Repair Service	Responding Service/Agency -
	Organization Number	Organization Type
	S-796-1	Corporation 👻
	Notified Type	Reference Number
	Dispatch -	4238-F
	Contact Person	Contact Phone
🖉 😣 🔤 🔤	🗟 O'Sullivan, Elaine 🛛 🖶 🗙	780 555 7809
Request Type	Request Assigned To Person	
Window Repair 👻	🖾 Thiessen, Ryan 🛛 🜵 🗙	
Assigned Date/Time	Tracking Number	
20/05/2011 09:08 AM 📫 🥅 🗙	780 555 7805	
Completed Date/Time		
20/05/2011 10:00 AM 🚦 🥅 🗙		
Request Notes		
During the fire alarm evacuation 19/05 Entrance. North Campus Security has t	/2011, an unknown person broke the se	cond left window at the Front
Entrance, North Campus Security has t	been called in to repair the window.	
		-

- 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.

<u>Add New</u> = <u>E</u> Total: 1	<u>idit</u> = <u>Remove</u>					
Organization Type	Organization Name	Involvement Type	Request Type	Assigned Date/Time	Completed Date/Time	Request Assigned To Person
Corporation	Window Glass Repair	Responding Servic	Window Repair	20/05/2011 9:08 AM	20/05/2011 10:00 AM	Thiessen, Ryan
Corporation	Window Glass Repair	. Kesponding Servic	Window Repair	20/05/2011 9:08 AM	20/05/2011 10:00 AM	Thiessen, Kyan
	10 (05 (2011	unknaum naman hmika ti	he second left wind	ow at the Front Entrance.		

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.

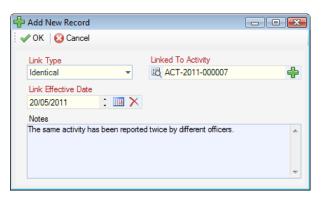
Attach a file to an Activity record

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**.

Activity Links Inciden	LINKS			
Add New Edit	Remove G	io to		
Number of Linked Activit	ies: 2			
Linked From Activity	Linked To Activity	Link Type	Link Effective Date	Notes
ACT-2011-000015	ACT-2011-000022	Identical	19/05/2011	Similar circumstances. Requires investigation.
ACT-2011-000022	ACT-2011-000007	Identical	20/05/2011	The same activity has been reported twice by different officers

Link an activity to an incident

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

♦ General ♦ Responses ♦ F	Requests 🔶 Involvements Att	achments 🔶 Links 🔶 Controls Audit H	listory
Details Standard Operating Procedur	es Assignments		
☆ Controls			
Org Level 1	AccessLevel	Archive (Record is not visible)	
Org Level 2	Activity Status Open - Report Required	Record Owners	
Org Level 3	Disposition Under Investigation -		
Org Level 4	Expiry Date 20/05/2011 : III ×		
♥ Workgroup Visibilities			

Define which workgroups can access the Activity record

In the **Workgroup Visibilities** section of the **Details** sub-tab, define access options for the record, as described in the "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.

General Responses Requests Involvem	ents Attachments	Links	Audit History	
ails Standard Operating Procedures Assignme	ents			
Security Activity: Facility Check				
Site:				
Acme University/Administration Building	A No. 1	Mass notification has bee		
Category:		viass nounication has bee	nsent	
Security Activity/Verification\Check/Facility Check	🖂 Noti	fication sent on (08/12/20	11 8:17:32 PM)	View Email
Security Activity/Vernicationicneck/Facility Check				
	very working day, at 18	:00, to confirm the integr	ty of the system settin	gs of computers on site.
The routine facility check is performed at the end of e SOP CheckList(s):	SOPAttachment	(s):	SOPLin	ks(s):
Procedure Description: The routine facility check is performed at the end of e SOP CheckList(s): Examine possible modifications made to the sy Examine possible modifications to data Examine the facility for possible external tools a Look for possible external tool output Review log files Check for systems possibly involved in intrusion	SOPAttachment	-	3-22-0(@ MIR31	

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 $\stackrel{\text{def}}{=}$ 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.

Laptop Corporate Property/Laptop		Ø
📕 Save 📝 Edit 📲 Add 👻 Delet	te 🔓 Lock 🖶 Print 🐵 Merge Items 😧 Cancel	
♦ General ♦ History ♦ Attach	nments 🔶 Controls Audit History	
	Item Name Laptop Serial Number XTP-400S Original Value \$2,900.00 CDN	
Item Category Corporate Property	tem Make	
Item Type	Item Model	
Laptop -	Inspiron E1705	
Owner Identified		
Owner Name Organization	Owner Name Person	
Notes Located at the cubicle ADMIN-66.	*	
	v	

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



- 3. Select the Gateway sub-tab, if it is not displayed by default.
- 4. To display the top 1000 imported records that have been added to Perspective or are available to be added, click **Search**.

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

- 5. To search for a particular imported record, set specific search criteria:
 - a. In the **Field Name** lookup list, select the field that you 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.

Rollup ITEMMAKEMODELROLLUPS
Rollup ITEMMAREMODELROLLOPS (E)
Select Cancel

- 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 Simport. 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.

K Import	🔹 Refresh				😧 Cle
Gateway					
Field Name		Operator	Value		
Item Name	•	=	 Laptop 	6	le And 💿 Or
Field Name		Operator	Value		
Item Make/N	fodel 👻	=	▼ Dell		🖯 And 🔘 Or 🛛 🔀
<					
Select Top					
1000	A.				Que Cauch Que Cauch
1000	×				Start Search Stop Search
1000 State	Submit ID	Record ID	Item Name	item Make/Model	Start Search Stop Search Notes
State		Record ID 78755343	Item Name Laptop Computer	Item Make/Model Dell/Inspiron E1705	
State Added	Submit ID				Notes
State Added Added	Submit ID Source System ID	78755343	Laptop Computer	Dell/Inspiron E1705	Notes
State Added Added Available	Submit ID Source System ID Source System ID	78755343 78755342	Laptop Computer Laptop	Dell/Inspiron E1705 Dell/Inspiron 710M	Notes
State Added Added Available Available	Submit ID Source System ID Source System ID Source System ID	78755343 78755342 101010101	Laptop Computer Laptop Laptop	Dell/Inspiron E1705 Dell/Inspiron 710M Dell/Inspiron E1505	Notes
	Submit ID Source System ID Source System ID Source System ID Source System ID	78755343 78755342 101010101 5251122448	Laptop Computer Laptop Laptop Laptop Computer	Dell/Inspiron E1705 Dell/Inspiron 710M Dell/Inspiron E1505 Dell/Inspiron E1705	Notes

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.

Add New Record	×
Link Type Linked To Case Common Organization Link Effective Date 01/12/2010 Link Effective Totate	
Notes Advanced Security Ltd., Human Resources	

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.

Add to Case	<u>Go to</u>						
Total: 8							
Incident Number	Class	Category	Occurred From Date/Time	Site	IncidentStatus	LossStatus	Investigation Start Date
ADMI-2010-000124	Criminal	Theft	22/11/2010 4:20 PM	Site A/Building 1/Location 1/Se	Open	Stolen	23/11/2010
ADMI-2010-000125	Criminal	Break a	24/11/2010 10:12 AM	British Columbia/Salmon Arm	Open		
ADMI-2011-01-00006	Criminal	Theft	20/01/2011 12:00 PM	Acme University/Administration	Open		
INC-2009-000262	Non-C		13/10/2009 4:36 PM		Open	Damaged	

Attach a file to an Item record

Open the **Attachments** tab and complete the operation, as described in the "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.

♦ General ♦ History	 Attachments 	♦ Controls	Audit History
Details			
☆ Controls			
Org Level 1	Access	LevelID	
North America	Level 3	3	 Archive (Record is not visible)
Org Level 2			
Canada	-		
Org Level 3			
Alberta	-		
Org Level 4			
Edmonton	-		
Workgroup Visibilities			

Define which workgroups can access the record

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

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

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

etai	- L					
C	Controls					
: W	Vorkgroup Visibilities					
. (Owner Workgroup (Full Rights)	All Other We	orkgroups			
- [Advanced Users 👻	Read		•		
	Add Exception(s) X Remove					
} Wo	orkgroup			Update	None	
⊫ Wor	orkgroup Workgroup A			Update	None	
⊫ Wor	orkgroup				None	
₩oi	orkgroup Workgroup A				None	

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.

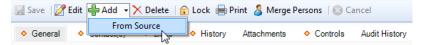
To create a Person record using the standard **Add** function, follow the steps described below:

- 1. Click the **Add** button rightarrow 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.

Howard, Katherine M DOB: 04/06/1983											Ø
🛃 Save 📝 Edit 🖶 Add 🔹 🔀	Delete 🔒	Lock 🖶 P	rint 🌡	Merge P	ersons	😧 C	ancel				
General Contact(s)	Links	History	Attachr	nents	 Con 	trols	Audi	History			
Additional Information Cubicle ADMIN-56	Title Miss v Date of Bith 04/06/1983 Eye Color Grey		Hair Colo Brunette	r	e	How	Marital Single	Status Weight 135 lbs	Designation Ph. D.]	
CUDICIE ADMIN-66.								÷			

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 right righ



- 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.

Import									
🕴 Ķ Import 👩 Refres	h	😢 Close							
Active Directory Gatew	ay OutlookContacts								
Objects to query Object Search Users v Craig E Find									
Search Result	Filter Any Exact Search Result								
Advanced Securit - & Users (2) - & Craig Fre	her								
Craiq Fisher Technical Support Analy	st								

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**.

+	Add New Record				×
	🖉 OK 🛛 😧 Cancel				
	Feature Type		Location		
	Distinguishing Marks	•	Left side of forehead		
	Description				
	Birth mark				
				Ψ.	

4. Click **OK**.

 General 	 Contact(s) 	♦ Links	♦ History	Attachments	♦ Controls	Audit History
☆ Unique Featu	ITAR					
 Add New 		emove				
 Add New 		emove				
Total: 2						
Feature Typ	e 🛆 Loc	ation	Description			
Distinguishing	Marks Left side (of forehead	Birth mark			
Tattoos	Left shoul	der	Snake			
Q						
* Identification	S					
¥ Trespass De	tails					
Flags Details						

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.

🖶 Add New Record	- • ×
V OK S Cancel	
Identification Type Identification Number	
Driver's License T234566-789	
Issued By	
Alberta Motor Association	
Comments	
Class 5 operator's license	
-	

5. Click **OK**.

♦ General ♦ Co	ontact(s) 🔶 Links	♦ History A	Attachments	 Controls 	Audit H	History	
¥ Unique Features							
Identifications							
• <u>Add New</u> • <u>E</u>	<u>dit</u> = <u>Remove</u>						
Total: 2							
Identification Type	Identification Number		Issued	Ву		Comments	
Driver's License	1234566-789	Alberta Motor	Association			Class 5 operator's license	
Birth Certificate	59-01-012345	Regina, Saska	atchewan, Depa	rtment of Public	: Health	Birth date: March 27, 1980	
Q							
¥ Trespass Details							
¥ Flags Details							

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**.

OK 🙆 Cancel			
on odnoor			
Site		Expiry Date	
Site A	-	27/12/2011	: 💷 🗙
Building			
Building 2	-	Notice Printed	
Location			
Location 1	-		
Section			
Section C	-		
Comments A copy of the Trespass Attachments.	Report for th	nis property is enclosed ir	n the

6. Click OK.

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

Flag the person

- In the Flag Details section, select each flag's Status (i.e., Yes, No or Unknown), depending on whether or not the flag applies to the person. Also, select the Severity of the flag. Examples of flags include Violent, Trespasser, Wanted, etc.
- 2. Type any other comments under Flag Notes.

General	 Contact(s) 	 Links 	♦ History	Attachm	nents	♦ Co	ontrols	
Unique Fe	atures							
Identificat	ions							
Trespass	Details							
Flags Det	ails							
	Description			Statu	JS	Severi	ty	
۳ 🛛	Wanted		[Yes	Ŧ	Critical	-	•
۷ 🦋	Violent			No	Ŧ		Ŧ	Е
🌾 т	Trespasser		[Yes	Ŧ	High	-	
1 🤟	Infectious			Unknown	-		-	-

Record contact information

- 1. Select the **Contact(s)** tab.
- 2. In the Address section, click Add New. A pop-up window will open.
 - a. Specify the Address Type (e.g., Business, Head Office).
 - b. Enter the person's full address in the fields provided.
 - c. If the address entered is the person's main address, check the **Primary Address** box.
 - d. Click OK.

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

- 3. In the **Phone Numbers** section, click **Add New**. A pop-up window will open.
 - a. Select the Phone Type (e.g., Main, Work).
 - b. Enter the person's **Phone Number**. To avoid duplicate entries and to facilitate accurate searches, it is best to use a consistent format when entering phone numbers (e.g., hyphens in place of spaces, no parentheses, etc.).

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

Add New Record		
V OK 🛛 😮 Cancel		
Phone Type	Phone Number	
Cell	17804344402	
	Primary Phone?	

- 4. In the Email Address section, click Add New. A pop-up window will open.
 - a. Specify the **Email Type** (e.g., Home, Work, etc.).
 - b. Enter the person's Email Address.
 - c. If the email address is the person's main email address, check the **Primary Email** box.
 - d. Click OK.

Add New Record			
🕴 🛷 OK 🛛 🙆 Cancel			
Email Type Work	¥	Email Address kathy howard@mywork.ca IZ Primary Email?	

5. Add as many contact entries, as needed.

Address						
Add New	= <u>Edit</u> = <u>Re</u>	move				
Total: 1						
Primary Addres	s? Address T	ype Address 1	Address 2	Geographic Rollup	ZIP / Postal Code	
\mathbf{V}	Home	671 Nicholas Street	С	anada/Alberta/Edmonton	A1B 2C3	
* Phone Number	5					
Add New	= <u>Edit</u> = <u>Re</u>	move				
Total: 2						
Primary Phone?	Director	Phone Number				
Frimary Phone?	Home	17805550987				
	Cell	17804344402				
	Cell	17804344402				
Email Address						
Add New	• <u>Edit</u> • <u>Re</u>	move				
Total: 1						
Primary Email?	Email Type	Email Address				

Link a record to a person

- 1. Select the Links tab.
- 2. In the Person Links section, click Add New. A pop-up window will open.
- 3. Indicate how the record is related to the person in the **Link Type** field (e.g., Partner, Employer, Driver, etc.).
- 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.
- 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.

Add New Record		×
🛛 🛷 OK 🛛 🙆 Cancel		
Link Type	Linked To Person	
Partner	🗟 Brown, Jeff L 🛛 🖶 🗙	
Link Effective From Date	Link Effective To Date	
12/07/2007 📫 📉 🗙	÷ 💷 🗙	
Notes		
Mr Brown works at the same department as do	es Ms Howard.	
	-	

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

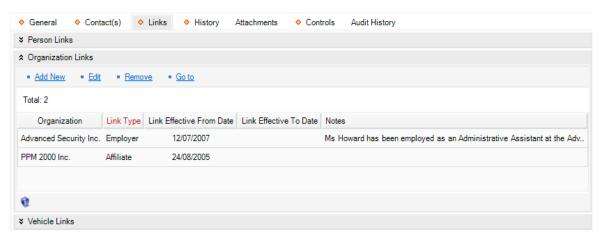
♦ General ♦ Co	ntact(s) 🔶 Links	s 🔷 His	tory Attachments <	Controls Audit Hist	lory		
☆ Person Links							
• Add New • Ed	= Add New = Edit = Remove = Go to						
Total: 2							
Linked From Person	Linked To Person	Link Type	Link Effective From Date	Link Effective To Date	Notes		
Howard, Katherine M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

Link a record to an organization

- 1. Select the **Links** tab.
- 2. In the **Organization Links** section, click **Add New**. A pop-up window will open.
- 3. Specify how the record and the organization are related in the **Link Type** field (e.g., Employer, Parent Company, Owns/Owned By, 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.

d New Record				
/ OK 🛛 😧 Cancel				
Link Type Employer	-	Organization	₽ ×	
Link Effective From Date 12/07/2007	: 🔳 🗙	Link Effective To Date	: X	
Notes				
Ms Howard has been employed Inc. since July 2007.	as an Administ	rative Assistant at the Advance	ed Security 🔺	

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



Link a record to a vehicle

- 1. Select the Links tab.
- 2. In the Vehicle Links section, click Add New. A pop-up window will open.
- 3. Specify how the record and the vehicle are related in the **Link Type** field (e.g., Registered Owner, Owns/Owned By, Same Fleet, 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.

Add New Record				
🛛 🛷 OK 🛛 🙆 Cancel				
Link Type		Vehicle		
Driver	-	🖸 URV-345	🖶 🗙	
Link Effective From Date		Link Effective To Date		
		DIR Diective to Date		
09/06/2009	÷ 🎟 🗙		÷ 🎟 🗙	
Notes				
VIN: 4LUKPI22222M333333			*	
			-	

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

♦ General ♦ Contact(s)	s) 🔷 Links	♦ History A	ttachments	◆ Controls	Audit History		
¥ Person Links							
Vorganization Links							
☆ Vehicle Links							
= <u>Add New</u> = <u>Edit</u>	= <u>Add New</u> = <u>Edit</u> = <u>Remove</u> = <u>Go to</u>						
Total: 2							
Vehicle	Link Type Li	nk Effective From Da	ate Link Effect	tive To Date	Notes		
PPP-616 - Honda/Odyssey	Passenger	06/02/2008	10/0	2/2009			
URV-345 - BMW/M3	Driver	09/06/2009			VIN: 4LUKPI22222M333333		

View person's incident involvements

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

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.
- 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**.

♦ General ♦	Contact(s)	Links	s 🔶 History	Attachments	♦ Controls	Audit History
Details						
☆ Controls						
Org Level 1		ļ	Access Level			
North America	1	•	Level 1 (Lowest)	•	Archive (Red	ecord is not visible)
Org Level 2		E	Employee Number			
Canada		▼	ADMIN-5687		Employee	
Org Level 3						
Alberta		-				
Org Level 4						
Edmonton		-				
✤ Workgroup Vis	ibilities					

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.
- If the organization has a Web site, specify the Web address under Organization Webpage URL. Clicking the adjacent Microsoft Internet Explorer[®] icon S will open the Web page in a separate browser window.
- 6. Enter any additional information about the organization in the **Notes** box.
- 7. To add an **image** to the Organization record, click the **Add** icon 🕒 in the image box. Locate the image file in the browser window and click Open.

Metropolitan Police Service C-9870-D		Ø
🛃 Save 📝 Edit 🔮 Add 👻 Delet	te 😭 Lock 🖶 Print 🦓 Merge Organizations 😧 Cancel	
♦ General ♦ Contact(s) ♦ Lin	nks 🔶 History 🔶 Attachments 🔶 Controls Audit History	
Metropolitan	Organization Name Metropolitan Police Service Organization Number C-9870-D Organization Type Municipal Agency Organization Webpage URL www.metropolitanps.com Image: Comparization Comparizat	
Notes		
Est. 1955.	A V	

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.

URV-345 BMW/M3			0
Save 📝 Edit 🖶 Add 👻 🛛	Delete 🔒 Lock 🖶 Print 🚓 Me	rge Vehicles 😵 Cancel	
♦ General ♦ Links ♦ His	tory Attachments	s Audit History	
	License Plate URV-345	License Plate Registered In Country	
	VIN	State\Province	
	4LUKPI22222M333333	Alberta	
	Vehicle Value \$103,250.00	SD Year 2007 :	
Make	Style	Division	
BMW	▼ 2 Door	▼ Security ▼	
Model	Color	Branch	
M3	▼ Green	✓ Operations	
Comments Bought in 2010.		*	

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

Link a vehicle to a person

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

Link a vehicle to an organization

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

Link a vehicle to another vehicle

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

View vehicle's incident involvements

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

Attach a file to a Vehicle record

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

Control a Vehicle record's processing options

Set the security controls and status of the Vehicle record

- 1. Select the **Controls** tab; the **Details** sub-tab will open by default.
- In the Controls section, fill out the Org Level fields to set the record visibility settings for the various hierarchically organized groups within your organization. Only users with organizational rollups corresponding to or higher than the organizational rollup you select for the record will have access to it.
- In the Access Level field, set the security level from 1 to 5. Each security level corresponds to a specific security description, such as "Classified". Only users with the same security Access Level as the one you select (or higher) will be able to view the record.
- 4. If you 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.

Details ✿ Controls	History		Audit History
Org Level 1 Europe Org Level 2 UK	•	Access Level Level 4	 Archive (Record is not visible) Company Vehicle
Org Level 3 England Org Level 4	▼ ▼		

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.

Quick Merge Items				
Primary R	ecord	Secondary Record		
Lapt	op Computer 🛛 🖶 🗙	Laptop	🖶 🗙	
		\bigcirc	tem Phote	3
Item Name	Laptop Computer	Item Name		Laptop 📝
Serial Number	XTP-400S	Serial Number		XTP-400S
Original Value	2135.00	Original Value		
Item Class Rollup	Corporate Property/Laptop	Item Class Rollup		
Item Make Model Rollup	Dell	Item Make Model Rollup		Dell/Inspiron E1705
Owner Identified	Yes	Owner Identified		Yes 🗸
Owner Name Organization		Owner Name Organization	S	ydney Police Service 🛛 🗸
Owner Name Person	Zeyen, Jeff	Owner Name Person		Woods, Victoria 🔽
Notes Located at the cubicle ADMIN-77.		Notes Bought in 2010.		
User Defined Fields		User Defined Fields		
Field Name	Field Value	Field Name	Field Value	Keep Value?
Expected Return \$		Expected Return \$	300.00	
Company Id Tag		Company Id Tag	487WF	
				Select/Deselect All
				Cancel 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.

🔂 Laptop Computer			
(0) Corporate Property/Laptop	Dell	 🔒 Laptop	
🔒 Laptop		 (0) Corporate Property/Laptop	Dell/Inspiron E1705
(0)	Dell/Inspiron E1705		

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

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

- 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;

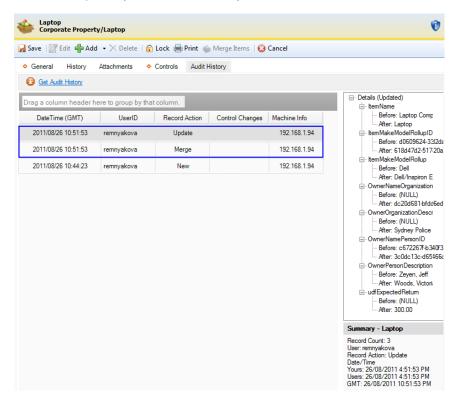
The records' Histories of all incident involvements;

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.

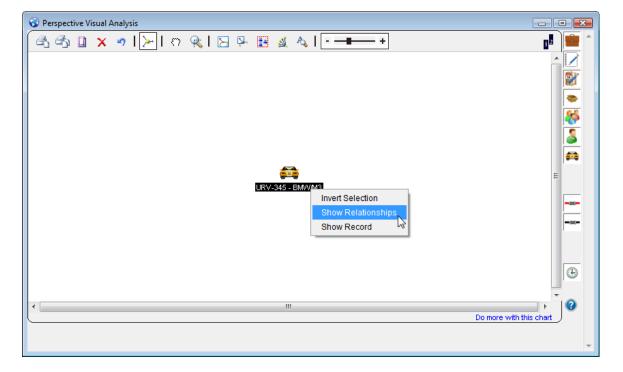


- 7. Scan the final record for possible repetitions of data that were merged and resulted in unintentional duplication of the same information.
- 8. Click **Save** to save the changes made.

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.

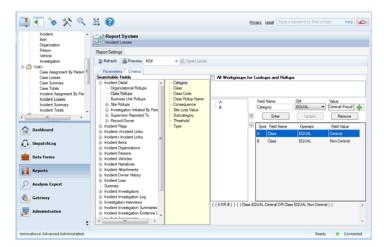
Reports

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 landscapeformat report.
- **Activity Portrait**: Displays the selected Activity record in great detail in a portrait-format report.
- **Case**: Displays the selected Case record.
- **Incident Condensed Landscape**: Displays the selected Incident record in great detail in a landscape-format report.
- **Incident Condensed Portrait**. Displays the selected Incident record in great detail in a portrait-format report.
- *Incident*: Displays the selected Incident record, including some of its investigation data.
- *Item*: Displays the selected Item record.
- **Organization**: Displays the selected Organization record.
- **Person**: Displays the selected Person record.
- **Vehicle**: Displays the selected Vehicle record.
- *Investigation*: Displays investigation data from the selected Incident record.

List

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

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

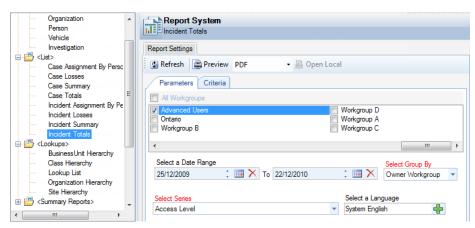
Summary Reports

- **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

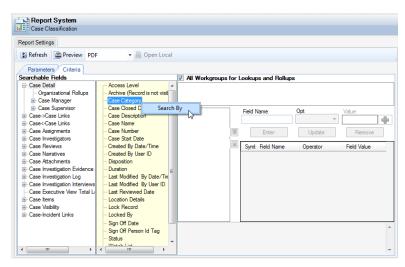
- 1. Select a report from the list in the Navigation pane.
- 2. The **Parameters** tab will open by default. Each report has a unique set of one or more parameters that can be specified before running your report. As in all other Perspective forms, red parameter fields are required and all others are 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 \clubsuit .

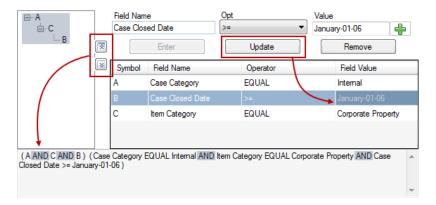
		Field Name Case Categ		Opt EQUAL	-	Valu	ue :mal	4
i i i i i i i i i i i i i i i i i i i	\approx		Enter		Update		Remove	
[×	Symbol	Field Name	(Operator		Field Value	

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

Every time you add a new field specification to the search criteria, the pane on the left will populate with **a new symbol** associated with the added criterion (e.g., A, B, C, 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.

B C		Field Name Item Category		Opt EQUAL -	Value Corporate Property
C		E	inter	Update	Remove
	×	Symbol	Field Name	Operator	Field Value
		A	Case Category	EQUAL	Internal
		в	Case Closed Date	e >=	February-01-09
		С	Item Category	EQUAL	Corporate Property
((AORBORC)) EQUAL Corporate Pro			UAL Internal OR 0	Case Closed Date >= Februa	ary-01-09 OR Item Category

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.
- 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**.

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

- 6. A **Report Options** window will open.
 - a. Click the **Open** icon to instantly view a printable PDF copy of the report.
 - b. Click the Send icon to send an email message with a PDF copy of the report attached.
 - c. Click the **Save** icon to save a PDF copy of the report to the location of your choice.
 - d. Click the Close icon to cancel the report.

🛄 Report	Options 💌
	t is available for viewing. d you like to do with this report?
	Open Open this report with PDF viewer.
	Send Send Report as Attachment
	Save Save Report as PDF
	Close
	Take No Action With This Report
Created :	4ar-19-2013 5:01 PM

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.

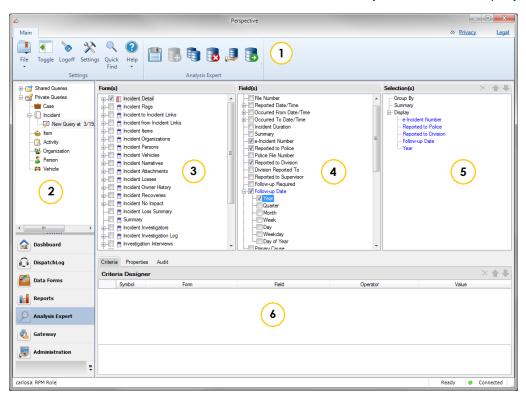
User Interface

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:

- 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 rightclicking 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 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.

Create New Query	X
Туре	
Incident 🔻	
Name	
<my incident="" query=""></my>	
Description	
Use this query to view incident Status, Access Level, Class, Category and Site.	
Add Cancel	

- 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.)?

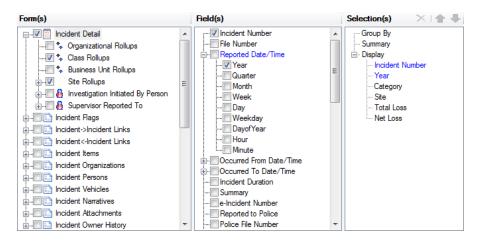
- If you want to search a portion of data, what parameters do you want in your search?
- What type of data do you want to see in your query results (e.g., incident time, place, losses, etc.)?
- How do you want to present your data? Do you want to summarize your results or see lists of actual data values?

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.
- 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 \times in the top right corner of the pane, or **uncheck** the field's checkbox in the Field(s) pane.



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

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

Field(s)			
····· Incident Numb	er		
File Number			
Reported Date	e/Time		
- Vear		_	
🔲 Quar 🔗	Search By		E
Mont	Group By		
🗖 Day	Cancel		
Weekuay		-	
Dayof Yea	r		
🔳 Hour			
Minute			Ŧ

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

	9 4			
lool	Form	Field	Operator	Value
A k				
-	_			Incident Detail Year =

- 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.

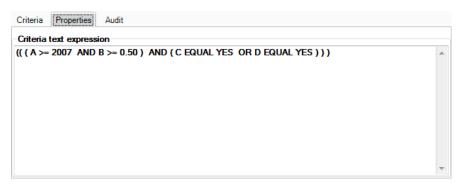
Crite	ria Proper	ties Audit			
Crit	eria Desig	ner			× 🛧 🗸
	Symbol	Form	Field	Operator	Value
	A	Incident Detail	Year	>=	2007
•	В	Incident Loss	Net Loss	·	• 0.50
				>	
				>= < ↓g <=	
				0	
(A A)	ND B)				

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

Symbol	Form	Field	Operator	Value	
A	Incident Detail	Year	>=	2007	
B	Incident Loss	Net Loss	>=	0.50	
С	Incident Detail	Reported to Supervisor	=	YES	
D	Incident Detail	Reported to Division		YES	

- 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 X 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.

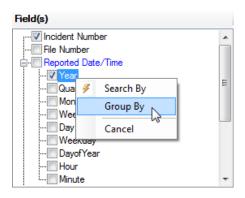


OPTION 2a: If you want to see lists of raw data values in your query results, proceed to execute your query.

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).



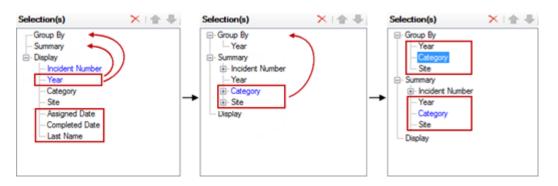
The **Summary** function is activated when at least one Group By field is selected. This will reflect in the view of the Selection(s) pane: the selected field name will automatically populate the pane under *both* Group By and Summary, while the field names that were listed under Display, will all be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

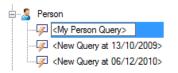
3. Proceed to save or execute the query.

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.

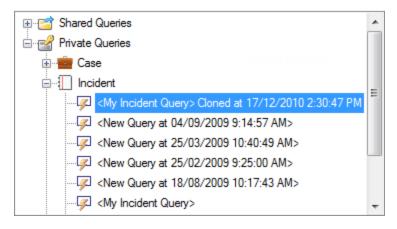


• To edit the text of a query's description, right-click the query entry and select **Edit Description**. A pop-up window will open that contains the text of the current description. Make the necessary changes and click **Save**.

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

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.

Criteria Properties Au	dit				
Last Run By User Clint	Last Run Time 23/02/2011 7:55:35 AM	Last Run Returned Rows 2	Last Run Duration (second)		
Where Clause SELECT ID_PK FROM dbo f FROM tblPerson Trespasses	ontblPersonsSecuredByUser(10 EPersonTrespass WHERE (Co	a0e4c81-7b70-4261-9ff6-0ab2c onvert(varchar(10), <u>ExpiryDate</u>	e47578c) AEPersons WHERE 01, 111) = '2011/02/23)))	((ID_PK IN (SELECT PersonID_FK >	
LastName] FROM dbo.fcntblF (df2abbf2-9684-45c4-847a-c	ersonsSecuredByUser('0a0e4c 1065bcb4716)', '{df2abbf2-968	81-7b70-4261-9ff6-0ab2ce475 4-45c4-847a-c1065bcb4716})	78c') AEPerson Detail WHERE SELECT AEPerson Trespass.IL		

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**:

iew Style							
Show Child Record	Rec	cords Found (56)					
	D	rag a column header l	nere to ara	up by that column.			
Horizontal	125	Incident Detail					
Vertical		Incident Number	Year	∑ Class Rollups.Category	Site Rollune Site	Incident Loss.Total Loss	S Incident Loss Nat Loss 5
Outlook Group By		INCD000000186	2008	Security & Safety Systems	Site A	95	
Expand All		INCD000000108	2007	Assault	Site A	12	
Expanditur		INC-2009-000002	2009	, bodan	U.LO T	20	
ard View		ADMI-2010-000122	2010			21207	
		INCD000000118	2007	Theft	Site A	1300	
		ADMI-2010-000121	2010	mon	Chorr	200000	
xt Search		INCD000000176	2008	Public Order	Site C	250	
	l i	INCD000000157	2008	Theft	Nova Scotia	189	
 Backcolor of Search Results 		INCD000000167	2008	Theft	Nova Scotia	605	
Include Child Record		ADMI-2010-000124	2000	Theft	Site A	725	
Exact Match of Text		INCD000000139	2010	Theft	Site C	1300	
Case Sensitive							
	+	INCD000000148	2008	Theft	Nova Scotia	850	0 8500

Or not:

ew Style	Deserted	Found (32)						
Show Child Record	Records							-
 Horizontal 	Drag a	column head	er here to group by that col	umn.				
 Vertical 	Inciden	t Detail						1
Outlook Group By	Year	∑ COUNT_	∑ Class Rollups.Category	Site Rollups.Sit SU	IM_Incident Loss.Tot 🗴 SUM_Inc	ident Loss.Net 🔉	GROUPED_BY	
0	2007	1	ACCIDENTS	Site B	19000	19000	2007/ACCIDENTS/Site B	
Expand All	2007	2	Assault	Site A	1823625	1818171	2007/Assault/Site A	
	2007	1	Emergency Situation	Site B	50	50	2007/Emergency Situatio	
rd View	2007	3	Fire	Site A	28440	19500	2007/Fire/Site A	
▼	2007	2	Fire	Site B	30000	25000	2007/Fire/Site B	
ext Search	2007	1	Harassment	Site D	1245.99	1245.99	2007/Harassment/Site D	
AL JEBICH	2007	1	Security & Safety Obse	Site A	450	450	2007/Security & Safety O	
	2007	1	Theft	Site A	13000	5000	2007/Theft/Site A	
Backcolor of Search Results	2007	1	Theft	Site B	100	100	2007/Theft/Site B	
Include Child Record	2007	2	Theft	Site C	13099	10099	2007/Theft/Site C	
Exact Match of Text	2007	1	Theft	Site D	350	350	2007/Theft/Site D	
Case Sensitive	2008	1	ACCIDENTS	Manitoba	4532	4442	2008/ACCIDENTS/Manito	
Search Grid	2008	1	ACCIDENTS	Site C	16133	15052	2008/ACCIDENTS/Site C	

• 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.

View Style	Rec	cords Found (56)					
Show Child Record	l e			_			
Horizontal	D	Irag a column heade	r here to	group by that column.			
Vertical		Incident Detail					
Outlook Group By		Incident Number	Year	Class Rollups.Category	Site Rollups.Site	Incident Loss.Total Los D	Incident Loss.Net Los Σ
		INCD000000186	2008	Security & Safety Systems	Site A	950	160
Collapse All		Incident Investig	gators				
• • • •		Assigned Date		Completed Date		Investigator.Last Name	
Card View		24/02/2009		25/02/2009		Adams	
-		13/04/2009				Cover	
Text Search	- 11	Incident Detail					
		Incident Number	Year	∑ Class Rollups.Category	Site Rollups.Site	Incident Loss.Total Los D	Incident Loss.Net Los D
Backcolor of Search Besults		INCD000000108	2007	Assault	Site A	125	125
Backcolor of Search Results Include Child Record		INC-2009-000002	2009			200	200
Exact Match of Text		ADMI-2010-000122	2010			212070	212070
Case Sensitive		INCD000000118	2007	Theft	Site A	13000	5000
		ADMI-2010-000121	2010			200000.2	120000.1
Search Grid		INCD000000176	2008	Public Order	Site C	2500	2500
		Incident Investig	ators				
		Assigned Date	,	Completed Date		Investigator.Last Name	
		15/02/2009				Holman	
						Durov	
		08/02/2009					

• 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.

/iew Style	Rec	ords Found	(56)									
Show Child Record		Incident [)etail					_	Incident Investi	gators		-
Horizontal		Incident N	YΣ	Class Rollup	Site Ro	Incident	Σ Incident	Σ	Assigned Date	Completed Date	Investigator.Last Name	
Vertical		INCD00	200	Security &	Site A	95	0 16	0	24/02/2009	25/02/2009	Adams	
Outlook Group By									13/04/2009		Cover	
Collapse All		INCD00	200	Assault	Site A	12	5 12	5				
		INC-200	200			20	0 20	0				
ard View		ADMI-20	201			21207	0 21207	0				
*		INCD00	200	Theft	Site A	1300	0 500	0				
ext Search	a ll	ADMI-20	201			200000	2 120000	1				
		INCD00	200	Public Orde	Site C	250	0 250	0	15/02/2009		Holman	
Backcolor of Search Results									08/02/2009		Durov	
Include Child Record									22/02/2009		Johanssen	
Exact Match of Text Case Sensitive		INCD00	200	Theft	Nova	189	5 189	5	13/01/2007		St. Jean	
Search Grid		INCD00	200	Theft	Nova	605	0 605	0				
		ADMI-20	201	Theft	Site A	725	0 64	0	23/11/2010		Davis	
									23/11/2010	25/11/2010	Campbell	

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.

iew Style						
	Records Found (56)					
Show Child Record	Incident Detail					
Horizontal						
Vertical	Incident Number	INCD00000009	INCD00000008	INCD00000011	INCD00000009	INCD00000012
Outlook Group By	Year Σ	2007	2007	2007	2007	2008
Collapse All	Class Rollups.Category	Fire	Emergency Situa	Fire	Theft	Theft
Collapse All	Site Rollups.Site	Site A	Site B	Site B	Site C	Site A
ard View	Incident Loss.Total Loss 2	18940	50	6000	99	12
cident Detail	Incident Loss.Net Loss 2	10000	50	6000	99	10
None> cident Detail						
cident Investigators	Incident Number	INCD00000012	INCD00000013	INCD00000008	INCD00000010	ADMI-2010-0001
- V	Year Σ	2007	2007	2007	2007	2010
Backcolor of Search Results	Class Rollups.Category	Fire	Fire	Fire	Theft	
Include Child Record	Site Rollups.Site	Site B	Site A	Site A	Site B	
Exact Match of Text	Incident Loss.Total Loss 🗴	24000	5000	4500	100	34564.3
Case Sensitive	Incident Loss.Net Loss 2	19000	5000	4500	100	14564.1
Search Grid	•					

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.

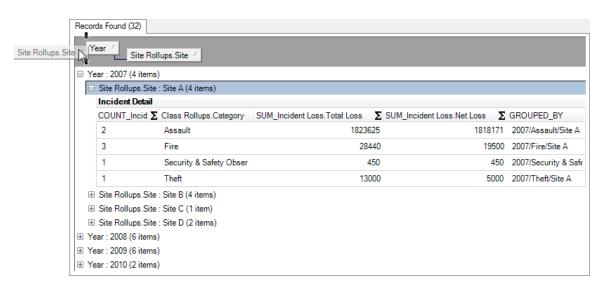
ew Style	Rec	ords Found (56)						
Show Child Record		Incident Detail						-
Horizontal		Incident Number	Year	∑ Class Rollups.Category	Site Rollups.Sit	Incident Loss.Total L	Σ Incident Loss.Net Lo Σ	Σ
Vertical		INC-2009-000252	2009			2211	1 2211	ī
Outlook Group By		ADMI-2010-00011	2010			3000	0 3000	ז נ
		INCD000000182	2008	ACCIDENTS	Manitoba	4532	2 4442	2
Collapse All		INCD000000185	2008	Emergency Situation	Site B	5437724.63	3 5437594.63	3
ard View	- 11 - 1	Incident Investi	gators					
lone> 👻		Assigned Date		Completed Date		Investigator.Last Name		
		06/04/2006				Adams		
ext Search		17/03/2009		17/03/2009		Johanssen		
09		Incident Detail						
Backcolor of Search Results		Incident Number	Year	∑ Class Rollups.Category	Site Rollups.Sit	Incident Loss.Total L	Σ Incident Loss.Net Lo Σ	ε
Include Child Record		INCD000000186	2008	Security & Safety Syste	Site A	950	0 160)
Exact Match of Text		Incident Investi	gators					
Case Sensitive		Assigned Date	-	Completed Date		Investigator.Last Name		
Search Grid		24/02/2009		25/02/2009		Adams		

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.

Records Fo	ound (32)			Records Found (32)
Year _g 😞	ο <mark>Σ</mark> mn head	er here to group by that col	umn.	Year /
incident	Detail			
Year	S COUNT	∑ Class Rollups.Category	Site Roll	
2007	1	ACCIDENTS	Site B	
2007	2	Assault	Site A	
2007	1	Emergency Situation	Site B	

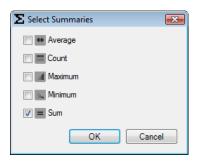
- To **add another tier** to the grouping, first expand one of the nodes to view its data in grid format. Then, click and drag a different column heading to the grey box. The query results will once again collapse, grouped first by your initial selection, and then by your second selection. You may continue 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

- 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.)
- 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.

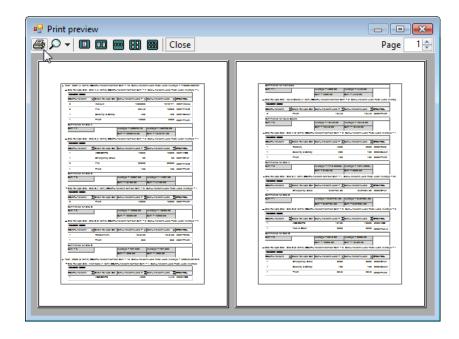
COUNT_Incident Number	Class Rollups.Category	SUM_Incident Loss.Total Loss 2	SUM_Incident Loss.Net Loss 2	GROUPED_BY
2	Assault	1823625	1818171	2007/Assault/S
3	Fire	28440	19500	2007/Fire/Site
1	Security & Safety Observ	450	450	2007/Security 8
1	Theft	13000	5000	2007/Theft/Site
Summaries for Site A				
Sum = 7		Average = 466378.75 Sum = 1865515.00	Average = 460780.25 Sum = 1843121.00	
	nems) COONT_Incident Numb	er Sum = 5, SUM_Incident Loss. I otal	Loss Average = 12287.50, SUM_In	cident Loss.Net I
Incident Detail COUNT_Incident Number	∑ Class Rollups.Category	SUM_Incident Loss.Total Loss		cident Loss.Net l GROUPED_BY
Incident Detail			SUM_Incident Loss.Net Loss ∑	
Incident Detail COUNT_Incident Number	∑ Class Rollups.Category	SUM_Incident Loss.Total Loss 2	SUM_Incident Loss.Net Loss 2 19000	GROUPED_BY 2007/ACCIDEN
Incident Detail COUNT_Incident Number 1	∑ Class Rollups.Category ACCIDENTS	SUM_Incident Loss.Total Loss 2 19000	SUM_Incident Loss Net Loss 19000 50	GROUPED_BY
Incident Detail COUNT_Incident Number 1 1	Class Rollups.Category ACCIDENTS Emergency Situation	SUM_Incident Loss.Total Loss 2 19000 50	SUM_Incident Loss Net Loss 19000 50 25000	GROUPED_BY 2007/ACCIDEN 2007/Emergeno
Incident Detail COUNT_Incident Number 1 2 1 Summaries for Site B	∑ Class Rollups.Category ACCIDENTS Emergency Situation Fire	SUM_Incident Loss.Total Loss 2 19000 50 30000 100	SUM_Incident Loss .Net Loss 19000 50 25000 100	GROUPED_BY 2007/ACCIDEN 2007/Emergenc 2007/Fire/Site
Incident Detail COUNT_Incident Number 1 1 2 1	∑ Class Rollups.Category ACCIDENTS Emergency Situation Fire	SUM_Incident Loss.Total Loss 2 19000 50 30000	SUM_Incident Loss Net Loss 19000 50 25000	GROUPED_BY 2007/ACCIDEN 2007/Emergenc 2007/Fire/Site

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.

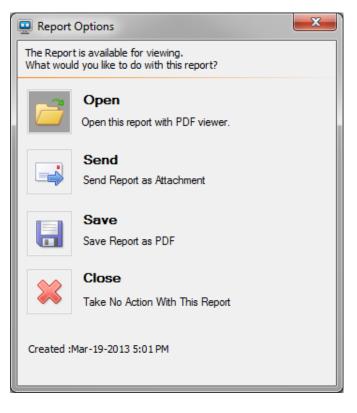
To **view a record** from the list of records contained in your query results, select the record and click **View Detail**. The record will open in a separate window in the read-only mode.

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

- 1. Select the record and click Derint Detail Report.
- A Report Visibility window will appear. This window contains checkboxes for all report sections containing data. By default, all boxes will be checked. Uncheck the boxes for any sections you do not 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.

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

- 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.

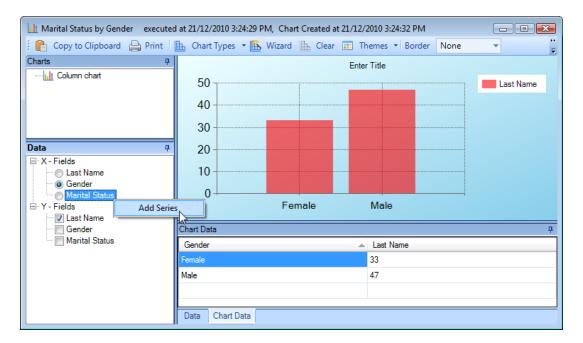
Click anywhere in the query results and then select **Wiew in Visual Analysis**. A separate Perspective Visual Analysis window will open with all the records listed in the query results contained within.

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

🚱 Perspective Visual Analysis				- • •
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INC-2009-000212	INC-2009-000029	ADMI-2010-000067		 N N
CCWI-2011-02-00026	INCD0000000103	LUIX-000000086	INC-2009-000022	
INC-2009-000095	CCWI-2011-02-00066	ADMI-2011-01-00012	INC-2009-000281	is chart
				-

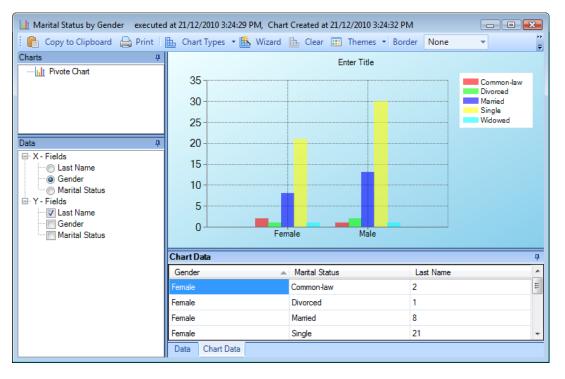
Chart query results

- To begin charting your query results, click Chart. If your query results contain child data, you may choose to chart either parent records (e.g., Person Detail) or child records (e.g., Person Incidents Involvement) by selecting the appropriate data label under the attached lookup.
- 2. A charting window will open with a blank Viewing pane, a list of variables available for charting listed in the **Data pane** on the left, and a grid with raw chart data listed at the bottom **Data tab**. (In this section, we will be looking at the case of an organization that wants to know the proportions of marital statuses of their employees by gender.)
- 3. In the Data pane, select an X-Field (e.g., Gender) and a Y-Field or multiple Y-Fields (e.g., Last Name) for your chart from the available options. The X-Field data will appear on the horizontal x-axis of your chart. The Y-Field data will appear on the vertical y-axis of your chart. If you select more than one Y-Field, ensure that they have the same unit of value (e.g., dollars, items). Note that Y-Fields are always charted as numerical values. Generally, text fields are counted (e.g., quantity of Incident Numbers or Last Names), while numerical fields are summed (e.g., amounts of Incident Losses).
- 4. Your chart will appear in the Viewing pane. By default, your initial chart will be formatted as a Column chart. The bottom pane will display your selected **Chart Data**.
- 5. You may copy and paste data from the Data or Chart Data tabs into Excel by highlighting the data and then using the Ctrl+C and Ctrl+V keyboard commands.



6. If you 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.

- Chart Types Vizare Clear Themes Border FrameTitel Penployee's Marital Status by Gender 3 Common-law Employee's Marital Status by Gender
- e. In the **III** Themes lookup list, select a color theme for your chart.

From the **Border** lookup list, select a border or frame style for the 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** in 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 to **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.
- 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.

A			Perspective	
Main				
File Toggle Logoff Setting Settings	S Quick Help Find			
🗍 All (10)	Incidents	ą		
	ERPT-2007-02-00002	×		
All Workgroups[9]	(1) Policy Violation	eReporting ^	🖳 Save 📝 Edit 📥 Assign 🌐 Delete 🥝 Accept 🛕 Pending 🤤 Reject 💿 Cancel	
Central [0]	ERPT-2007-08-00001		General Involvements Narratives Attachments Controls	
	(1) Policy Violation/Parking Policy	eReporting	Information	
Doons [9]	ERPT-2007-08-00002			
EastCoast [0]	(1) Policy Violation ERPT-2007-08-00003	eReporting	Reported By	
[] Eastern [0]	(1) Non-Criminal	eReporting	Name Submit ID	
	ERPT-2007-11-00001 (1) Non-Criminal/Security & Safety Syst	eReporting	Phone Email	
Pending[0]	ERPT-2007-11-00002	erepereng		=
C Rejected [0]	(1) Criminal/Fire/Arson/Major	eReporting	Reviews	
Incidents	GrpA-2008-02-00001			
	(1) Criminal/Assault/No Injury	Sample Gatewa		
Items	GrpA-2008-02-00002			
Persons (1)		Sample Gatewa		
Organizations	GrpA-2011-09-00001 (1) Procedural	PPMWindWate		
Vehicles	(1) Procedular	PPPIvvillavate		
Dashboard	<i>.</i>	2		
		9	* Details	
DispatchLog			Record Information	
ata Forms			eIncident Number Reported Date/Time	
Reports				
			Perspective Incident Number Occurred From Date/Time	
Analysis Expert			File Number Occurred To Date/Time Incident Duration	
Gateway			File Number Occurred To Date/Time Incident Duration	
Administration			Class Ste Level 1	
*		*	Category Building Level 2	-
carlosa RPM Role Record loaded s	iccessfully.			Ready \varTheta Connected

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

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

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

- 1. In the **Field Name** lookup list, select the field that you 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.

Class	•	Operato Not Equ		Criminal		(@) And	Or	
Field Name		Operato	rs					
elncident Number	•	Begins V	Vith 🔻 Grp.A	ι.		And	🔿 Or 🗙	
Field Name Occurred From Date	/Time ▼	Operato Before		1/2011 : 🎟 :	×	And	⊙ Or 🔀	
Гор: 1000	×					Start Sear	ch Stop Searc	
Incident Number	Reported	Occurred	Class Rollup	Site Rollup	State	Submit ID	attachment /	
arpA-2009-10-00007	27/10/2009	27/10/2009	Procedural/Emergency	Site A/Building 2/Locati.	New	eReporting	1	
	27/10/2009	27/10/2009	Procedural/Emergency	New Brunswick/Saint J	New	eReporting	1	
10-0008	12/10/2010	12/10/2010	Criminal/Theft/Company		New	eReporting	1	
		12/10/2010	Procedural/Security & S	Alberta	New	eReporting	1	
irpA-2010-10-00001	12/10/2010							
SrpA-2010-10-00008 SrpA-2010-10-00001 SrpA-2010-10-00002	12/10/2010							

Incidents

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

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

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

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

Common functions available for both Gateway Administrator and Gateway Approver:

🛃 Save	Preserves the changes you made to an e-Report.
📝 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.
m 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:

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

		00001) will appear under the Record Information in the General tab of both the e-Incident record and the actual Incident data form. Click OK . Note: The accepted e-Incident will be purged from the Gateway at the end of the Accepted Retention Period specified for the e-Incident's workgroup by the System Administrator. The original e-Incident form will remain in Perspective as 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.
1	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.
â Delete	Deletes a report from the Gateway as invalid. Once you click the Delete button, a pop-up confirmation window will appear. Choose the Mark As Delete radio button to store the imported report in the Deleted folder, where it can be recovered at any time prior to the end of the Deleted Retention Period specified for the report's workgroup by the System Administrator. Otherwise, choose the Immediate Delete radio button to permanently delete the report. Click Delete to confirm your choice.
XML View	Displays the imported report in its original XML format including hidden data, if available. Click the XML View button again to return to the standard view.

[]] All (20)	Persons	ņ	🧏 Mrs. Rupinder Minhas
	Minhas, Rupinder		
. Al Workgroups[4]	Workgroup B	Sample Ga	Available 📺 Delete 📼 XML View
Available[6]	Ross, Jerrell		
	Workgroup A	Sample Ga	Title First Name Initial Last Name
Added[10]	Spears, Susie		Mrs. Rupinder Minhas
Deleted[0]	Workgroup B	Sample Ga	Bith Date Gender Marital Status Designation
	Whillier, Ryan		Bith Date Gender Marital Status Designation 28/01/1970 Female
Incidents	Workgroup A	Source Syst	
Items			Eye Color Hair Color Height Weight
Persons			Brown Black
Organizations			Employee?
-			Yes
Vehicles			
	1		Employee Number 23786
Dashboard			
			Access Level Org Rollup
Data Forms			Flag Notes
Reports			
Analysis Expert			Additional Info.
Gateway			
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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.

C Start	Schedule	e Optic	ons	G					Persp	ective	DispatchL	.og						<u> </u>
Start	Close On Activity Duty Dispatch) 🙆 Off	Dispatch Officer	r Organization	Arrive Arriv All Actions	e Clear Clear All	Activity Details	Attachment S Record		G efresh	✓ High ♥ Filte	- tu		s Mail	CallSign Log	Workgroups Filter Not		
Activities SOP?	1	ty Number		Priority 🗸	Officer Status	থ RTA Aler	Time Remaining	Call C	ategor	y	V	Loca	tion	V	Off Site	Reported Date	Time	Organization Status
	CEN-20	11-10-0000	8	Low	Waiting	· ·			Alarm			Asis Conv	ention Cente	er		07/10/2011	1	
	CEN-201	11-10-0000	7	High	Waiting	2			Alarm			Asis Conv	ention Cente	er		07/10/2011		
	CEN-201	11-10-0000	6	Low	Waiting			Security Direct	ted Activ	ity/Fa	cility	Centra	Campus			07/10/2011		
	CEN-201	11-10-0000	3	Low	On Scene			General As	sistance	e/Assis	t C	Central Campus	/Building 2 ·	🕕		07/10/2011		
	CEN-20:	11-10-0000	2	Low	Waiting			Security Direct	ted Activ	ity/Fa	cility	Central Camp	us/Building	1		07/10/2011		
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8	3d 21h	P4	C300	Rosenburg,	Brian	Lunch - 30	(3)			8	3d 22h	P2	143B	Holla	and, Max	4 On Route	e	CEN-2011-10-00
8	3d 23h	P4	C322	Shantz, Greg	, ee	Available	\mathbf{U}			8	3d 22h	P2	177B	Duor	rov, Alex	On Route	e	CEN-2011-09-00
8	3d 23h	P4	C325	Kennedy, Fra	ank Jr. 🧳	Available				8	3d 22h	P2	137B	Ower	ns, Derek	On Scen	e	CEN-2011-10-00
8	3d 22h	P4	C330	Rutherford,	Justin	Dut of Service			-									
9:14	4 AM										5	data cen	ter. Pr	iorit	у 1-ніс	GH response :	requir	ed.

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

- 1. Drag the pane to its approximate desired location.
- 2. Select the exact positioning option from the set of position icons that appear on the screen. As you drag the pane to the icon, the system will mark the corresponding area where the pane will land if you drop it now.
- 3. If the blue area marks the position you wanted your pane to occupy, drop the pane. If not, drag the pane elsewhere.
- 4. To drag your pane out of the dock or dock it back into its previous location, double-click it.

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

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tivities													
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	tivity Numb	er	Priority V	Officer 5	Status V	RTA Alert	Remaining	CLEditegory	♥ Location	V		Reported Date/Time	Organization V Status
CEN-	-2011-10-00	0007	High	Wa	iting			Alarm	Asis Convention Center		E	07/10/2011	
	-2011-10-00	0006		Wa	iting			Security Directed Activity/Facility.	Central Campus		E	07/10/2011	
CEN-	-2011-10-00	0005	Low-	Wa	iting	0 %	- 3d 20h	Security Directed Activity/Facility.	Central Campus		V	07/10/2011	
CEN-	-2011-10-00	0004	Medium	On R	loute	0 %	- 3d 22h	Alarm/Duress\Panic	Central Campus/Building 1-		E	07/10/2011	
CEN-	-2011-10-00	1003	Low	On S	icene			General Assistance/Assist	Central Campus/Building 2		E	07/10/2011	
asigned	-2011-10-00	1002	Triw V Officer/Ori	We	itinó	ntus V	Activity Num	Security Directed Activity/Facility II	Central Campus/Buildion 1		r	07/10/2011	
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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].

Avai	lable					
	Team V	Call Sign 🛛	Officer/Organization Name	Status 🗸	Location V	Time Elapsed ♥
8	P1	132A	Dolby, John	[Clear] Available	Site C	23:35:27
8	P1	133A	Owens, Derek	Busy 🗟	Site C	1d 0h
8	P2	130B	Holland, Mary	Out of Service T-STP	Ontario	1d 12h
8	P1	133B	George, Sara	Available	Site C	23:35:23
8	P3	130A	Shantz, Gregg	T-STP		22:14:27
8	P3	133C	Zeyen, Jeff	Busy	Site C/Building 1	22:08:35
8	P3	130C	Bruce, Tom	Available	Site C	23:35:22

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

zation Name Status $ rianglerightarrow au$ Location $ au$ Time Elapsed $ au$
Available Site C 23:38:51
Available Site C 1d 0h
Available Site C 23:38:47
Available Site C 23:38:46
Busy Site C/Building 1 22:11:59
Out of Service Ontario 1d 12h
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 C 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.

lcon	Program Command	Selected Entity	Shortcut Key(s)
*	Start a new activity	Activity	<ctrl> + <s></s></ctrl>
V	Email a basic Activity record	Activity	<ctrl> + <m></m></ctrl>
?	Display activity details	Activity	<f6></f6>
8	Dispatch an organization	Activity	<ctrl> + </ctrl>
11.12 878	Update all officers' and organizations' statuses to "On Scene" for the selected activity	Activity	<ctrl> + <a></ctrl>
_	Add activity notes	Activity	<ctrl> + <n></n></ctrl>
Ø	Add an attachment to the selected activity	Activity	<ctrl> + <t></t></ctrl>
	Display the associated Standard Operation Procedures	Activity	<ctrl> + <p></p></ctrl>
T	Display assigned officers/organizations for the selected activity only	Activity	<ctrl> + <f></f></ctrl>
1	Highlight assigned officers/organizations for the selected activity only	Activity	<ctrl> + <h></h></ctrl>
%	Display activities filtered by specific workgroup(s)		<ctrl> + <w></w></ctrl>
	Clear all officers and organizations from the selected activity	Activity	<ctrl> + <l></l></ctrl>
*	Close an activity	Activity	<ctrl> + <o></o></ctrl>

Ø	Bring an officer on duty	_	<f8></f8>
8	Dispatch an officer	Available Officer	<ctrl> + <d></d></ctrl>
٩	Update an officer's Call Sign	Officer	<ctrl> + <e></e></ctrl>
0	Update an officer's/organization's Location	Officer/Organization	<ctrl> + <l></l></ctrl>
	Update an officer's/organization's Status	Officer/Organization	<ctrl> + <k></k></ctrl>
≞ ∳-	Update an officer's/organization's Status to "On Scene"	"On Route" Officer/Organization	<f2></f2>
-\$ <u>-</u>	Clear an officer/organization from the selected activity	Officer/Organization	<f3></f3>
8	Bring an officer off duty	Available Officer	<f9></f9>
<u>i</u>	Display officer log	Officer/—	<f7></f7>
Ø	Refresh the screens	_	<f5></f5>
_	Delete an activity	(Scheduled) Activity	<f11></f11>
÷	Add a new scheduled activity	_	<ctrl> + <1></ctrl>
7	Edit a scheduled activity	Scheduled Activity	<ctrl> + <2></ctrl>
	Delete a scheduled activity	Scheduled Activity	<f11> <ctrl> + <3></ctrl></f11>
	Copy a scheduled activity	Scheduled Activity	<ctrl> + <4></ctrl>
	Transfer a scheduled activity to the current activities list under the Start tab	Scheduled Activity	<ctrl> + <s></s></ctrl>
	Reset the current panels' layout to default	_	<ctrl> + <r></r></ctrl>
Ē	Clone activities for a separate window display and filtering	—	<ctrl> + <x></x></ctrl>
8.8	Clone resources for a separate window display and filtering	_	<ctrl> + <u></u></ctrl>
	•		

Create and Manage an Activity

Start a New Basic Activity Record

- 1. To start a new current activity, open the **Start** tab and click on the **Start** icon ³⁴ 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".

Close			
Activity Details			Supplemental Details
	Code Level 1	Priority	Call Source
09/2011 12:43 PM 🕴 🧰 🗙	900B Alarm	✓ Important	▼ Alarm ▼
	Level 2		Initiated By
Future dates will display only in Scheduled Activities.	Fire	v	🖾 Zeyen, Jeff 🛛 🖶 🗙
 In Scheduled Activities. 	Level 3		Contact Number
	Local Alarm	-	780 555 4444
			Call Taken By
			Ed. St. Jean, Clint
Activity Location			
			Dispatched By
Site	Address	Country	🖾 Remnyakova, Svet 🜵 🔀
Acme University 💌	1112 University Drive	Canada	-
Building	Address 2	State\Province	
Administration Building 👻	Administration Building	Alberta	-
Location	Postal Code	City	
•	T1A 2B3	Edmonton	Workgroup Visibilities
Section			Owner Workaroup
· ·	Off Site		Advanced Users
			All Workgroups
Description			Update
The fire alarm sounded at 9:58 am. Most st	aff evacuated the building by 10:20 am. iscovered that their fire exit had been blocke	d so they had to walk to the other side of th	
uilding to find an exit. This delayed their e	vacuation by 10 minutes.	a, as any find to wait to the other side of th	

- 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 <u>"Review the Activity's Standard Operating Procedures"</u> 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.

Activities											
Activity Number	Priority	Officer Status	RTA Aler	t Time Remaining	Call Category	Location	Off Site	Reported Date/	Organization Status	Description	-
ACT1-2011-00010:	Low	Waiting			General	Site C/Building	L	01/09/2011) with arrest of	
ACT1-2011-08-0001	Extreme	Waiting			Dangerous Condit	British Columbia	1	31/08/2011			
ACT1-2011-08-0001	Minimual	On Scene			Alarm	British Columbia	2	31/08/2011	On Route		=
ACT1-2011-08-0000	Important	On Route	57 %	00:00:30	Emergency Call/91	Alberta		31/08/2011			
ACT1-2011-08-0000	Minimual	Waiting	-		Escort	Alberta		31/08/2011			
ACT1-2011-00010	Minimual	On Scene			Security	Site D/Building 1		31/08/2011		ending Toronto I	
ACT-2011-000020	High	On Route			Alarm/Panic	Site A		12/08/2011	On Route		-
				RTA Alert	Time Ren	aining					
				41 %	00:00	17					
				21 %	00:00	02					
				0.04	00-04	17					
				0 %	- 00:00	:17					

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 <u>"Dispatch an Officer for an Activity"</u>, <u>"Update an Officer's/Organization's Status"</u>, <u>"View or Update an Officer's/Organization's Location"</u>, <u>"Update an Officer's Call Sign"</u>, <u>"Abandon an Activity Record"</u>, and <u>"Clear an Officer/Organization from an Activity"</u> chapters.

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

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

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

- 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.

Edit Activity: AC	T1-2011-000413						- • •
Ok Close							
♦ General Re	sponses Reque	ests Involvements	Attachments Assig	gnments			
Officer Responses	Organization Re	sponses					
Add New	Edit Remove						
Total: 2							
Officer Name	Call Sign	Assigned Date/Time	Start Date/Time	Arrived Date/Time	Cleared Date/Time	Response Time	Time On Site
Norton, John	130C	19/05/2011 10:00 AM	19/05/2011 10:00	19/05/2011 10:05 AM	19/05/2011 11:00 AM	0.08 hrs	0.92 hrs
Durov, Alex	PPM-002	19/05/2011 10:00 AM	19/05/2011 10:20	19/05/2011 10:40 AM	19/05/2011 12:00 PM	0.33 hrs	1.33 hrs
Conducted evacuation	on of staff from the b	uilding.					
ŵ -							

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 <u>"Dispatch an Organization</u>"

for an Activity", "Update an Officer's/Organization's Status", "View or Update an Officer's/Organization's Location", "Abandon an Activity Record", and "Clear an Officer/Organization from an Activity" chapters.

- Double-click the Activity record you 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**.

	One starting Name	hundungent Time
rganization	Organization Name Metropolitan Fire and Rescue Se	Involvement Type rvice Responding Service/Agency
👌 Metropolitan Fire an 🛛 📫 🗙	Metropolitan Fire and Rescue Se	
	Organization Number	Organization Type
m	C-9971-L	Municipal Agency 👻
DIPOLITICS 2	Notified Type	Reference Number
	Control Center	▼ FR-378
	Contact Person	Contact Phone
	Contact Person	
Responding Person	Dalton, Trevor 🖶	
Icd Dalton, Trevor Image: A state of the s	Dalton, Trevor 🖶	▶ 780 555 7777
Dalton, Trevor Image: Called Date/Time 19/05/2011 10:20 AM Arrived Date/Time	Image: Constraint of the second se	× 780 555 7777 ×
Dalton, Trevor	Image: Constraint of the second se	780 555 7777
Dalton, Trevor Image: Called Date/Time 19/05/2011 10:20 AM Arrived Date/Time	Image: Dalton, Trevor Image: Dalton, Trevor Notified By Person Image: Dalton, Gordon Image: Dalton, Trevor Image: Dalton, Trevor	× 780 555 7777

- 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.

Edit Activity: ACT	1-2011-000413									
Ok Close										
♦ General Res	ponses Requests	Involvements Atta	chments As	signme	ents					
Officer Responses	Organization Responses									
= Add New = I	Edit • <u>Remove</u>									
Total: 2										
Organization Type	Organization Name	Involvement Type	Called Date/	Time	Arrived Da	ate/Time	Cleared D	ate/Time	Response Time	Time On Site
Municipal Agency	Metropolitan Fire and	Responding Servic	19/05/2011 1	0:20	19/05/2011	10:30	19/05/2011	11:30 A	0.17 hrs	1.0 hrs
Municipal Agency	Metropolitan Police S	Indirectly Involved	19/05/2011 1	0:50	19/05/2011	11:20	19/05/2011	4:50 PM	0.5 hrs	5.5 hrs
Arrived at 10:30, chec	ked the building and left at	11:30.								*
										~
Q -										

Note an Action Request for an Activity

- In order to document an action request for an activity, double-click the Activity record or select it on the Activities pane and click Activity Details.
- 2. Select the **Requests** tab.
- 3. Click Add New. A pop-up window will open.
- Select the requested organization's record from the Organization pick list. If the corresponding Organization record does not already exist, use the Quick Add function to create one.
- 5. The **Organization Name** field will now automatically populate with the linked organization's name. Depending on the data available, some additional fields may also populate with information drawn from the linked Organization record.
- 6. To add the organization's **logo** to the record, click the Add icon G 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**.
- 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.

Organization	Organization Name	Involvement Type
🗟 Campus Security 🔰 🕂 🧎	Window Glass Repair Service	Responding Service/Agency -
	Organization Number	Organization Type
•	S-796-1	Corporation -
	Notified Type	Reference Number
	Dispatch 💌	4238-F
	Contact Person	Contact Phone
🔁 🔕 🔜 🔤	🗟 O'Sullivan, Elaine 🛛 📫 🗙	780 555 7809
Window Repair 💌	🗟 Thiessen, Ryan 🛛 🖶 🗙	
Assigned Date/Time	Tracking Number	
20/05/2011 09:08 AM 🚦 🏢 🗙	780 555 7805	
Completed Date/Time		
20/05/2011 10:00 AM 📫 🏢 🗙		
Request Notes		

- 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.

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

Add Persons Involved in an Activity

Note general details of an involved person

- 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 New Record				
🖌 🗸 OK 🛛 😧 Cancel				
Linked Person Rown, Jeff L		Involvement Type Witness	 Employee? Interviewed? First Aid Administered? Injured Person Hospitalized? 	*
Notes The only available witness is Je	off Brown who is seated in the cubicle section	on (ADMIN-77) three rows over Kathy Howard.		A T

Add the involved person's clothing details

- 1. Open the saved involved person's sub-record.
- 2. Open the "Click to Add Clothing Details" link.
- 3. Choose the **Clothing Type** and **Color** from the lookup lists.
- 4. Enter a detailed description of the item in the **Description** box.
- 5. Click **OK**, and repeat for as many articles of clothing as necessary.

🕂 Add New Record		
🕴 🛷 OK 🛛 🙆 Cancel		
Click To Add Clothing Details Eyewear Black		Remove
Clothing Type Eyewear	Color Black 👻	E
Description Black frame eye glasses.		

Record the involved person's sustained injuries

- 1. Open the saved involved person's sub-record.
- 2. Open the "Click to Add Injury Details" link.
- 3. Specify the **Injury Cause** and **Severity**.
- 4. Include a detailed description of the injury in the **Description** text box.
- 5. Click **OK**, and repeat for as many injury entities as necessary.

🖶 Add New Record		
🛛 🛷 OK 🛛 😧 Cancel		
Click To Add Injury Details		
-		Remove
Injury Cause	Severity	Ξ
Blunt Force Trauma 💌	Minor 👻	
Description		
Hit by a falling book, bruised.	×	
	-	
		v

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.

4	■ Ado	l Ne	w Record						x
1	V OF	()	😢 Cancel						
	* Fla	ags							
ĺ		-	Description	Status		Severity		Flag Notes Jeff Brown is the only witness of the incident.	
	٣	w	Wanted	Yes	•	Critical	Ŧ		
	1	۷	Violent	Unknown	-		-		
	1	т	Trespasser	Yes	-	Low	Ŧ		
	1	I.	Infectious	No	-		-		
	٣	R	Escapee	No	-		-		
	A	A	Armed and Dangerous	No	•		-		Ξ

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

Ok Close	 Responses 	Requests	Involvemen	nto Attac	hments	Assignments					
Persons Orga			mvolvemer	nis Allac	nments	Assignmenta	5				
 Add New 		move Go	to								
		<u> </u>									
Involved Person	n: 1										
Linked Person	Last Name	First Na	ame	Initial	Invol	lvement Type	Date of Birth	Gender	Employee?	Interviewed?	Notes
									_	_	
	Brown	Jeff		L	Witnes		26/03/1980	Male	V	V	The only a
	Brown	Jeff Title	First Name	L			26/03/1980	Male		V	The only a
	Brown		First Name Jeff		II	1	26/03/1980			V	The only a
Brown, Jeff L	Brown	Title		Gender	rr	r Last Name		Involvement T	ype		
	Brown	Title Mr.			rr	r Last Name Brown	Status	Involvement Ty Witness	ype		
	Brown	Title Mr. Date of Birth		Gender	rr	t Last Name Brown Marital	Status	Involvement Ty Witness	ype		

Add Organizations Involved in an Activity

- In order to add an involved organization to an Activity record, double-click the record or select it on the Activities pane and click Activity Details.
- 2. Select the Involvements tab, 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.

OK Cancel				*
	Organization Name Metropolitan Police Service	Involvement Type Indirectly Involved	•	
	Organization Number C-9870-D	Organization Type Municipal Agency		
Police	Notified By	Reference Number		
Coervices of	Control Center 💌	H-9870		
	Contact Person	Contact Phone		
	🖾 Armando, Luis 🛛 📫 🗙	780 555 0123		
Comments Called for supplementary investigation.			*	

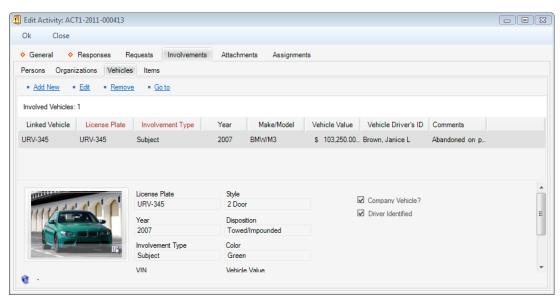
Edit Activity: ACT1-2011-000413						
Ok Close						
♦ General ♦ Responses Re	equests Involvements Att	achments Assignments	3			
Persons Organizations Vehicles	Items					
Add New Edit Remove	e Goto					
Involved Organizations: 1						
Linked Organization Organizati	on Name Involvement Type	Organization Number	Organization Type	Notified By	Comments	
Metropolitan Police S Metropolitan	Police S Indirectly Involved	C-9870-D	Municipal Agency	Control Center	Called for suppl	
4		m				•
	Organization Name	Contact Phone				Â
	Metropolitan Police Service	780 555 0123				
Matronalitan	Reference Number	Organization Number				E
Metropolitan	H-9870	C-9870-D				
Police	Organization Type	Involvement Type				
Services 🛒	Municipal Agency	Indirectly Involved				
	Notified By					-
e -	C C					

Add Vehicles Involved in an Activity

- In order to add an involved vehicle to an Activity record, double-click the record or select it on the Activities pane and click Activity Details.
- 2. Select the **Involvements** tab, 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.

Add New Record		
OK Cancel		
Linked Vehicle	License Plate	Involvement Type
🗓 URV-345 🖷	X URV-345	Subject 👻
THUL .	Disposition	Year
1111111111111	Towed/Impounded -	2007 🗘
LEER.	Make	Style
and the state	BMW 👻	2 Door 🔻
	Model	Color
	M3 👻	Green 👻
	VIN	Vehicle Value
Company Vehicle?	4LUKPI22222M333333	\$103,250.00 USD
Country Canada	Driver Identified	
State\Province	Vehicle Driver's ID	
Alberta	➡ Brown, Janice L	₽ ×
Comments Abandoned on premises. Stolen it	ems found inside.	
		*
		*



Add Items Involved in an Activity

- In order to add an involved item to an Activity record, double-click the record or select it on the Activities pane and click Activity Details.
- 2. Select the **Involvements** tab, the **Items** sub-tab.
- 3. Click Add New. A pop-up window will open.
- 4. Select the involved item's name from the **Linked Item** pick list. If an Item record does not already exist, use the Quick Add function to create one.
- The Item Name field will now automatically populate with the linked item's name. Depending on the data available, some additional fields may also populate with information drawn from the linked item's record.
- 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

Add New Record		- • ×
OK Cancel		
Linked Item		*
	tem Name Laptop Serial Number XTP-400S Disposition Seized As Evidence ▼	
☑ Item IS Evidence?	Item Value \$2,135.00 USD	
Item Category	Item Make	
Corporate Property 💌	Dell	
Item Type Laptop	Item Model Inspiron E1705	
Laptop	Inspiron E1705	
Owner Identified/Known? Organization Owned By IG Sydney Police Service	Person Owned By	♣ X
Notes		
Located at the cubicle ADMIN-77.		*

4	Edit Activity: A	CT1-2011-000	413							
	Ok Close									
	General Responses Requests Involvements Attachments Assignments									
	Persons Organ	Persons Organizations Vehicles Items								
	Add New	• <u>Edit</u> • <u>F</u>	Remove Go	to						
	Involved Items: 1									
	Linked Item	Item Name	Category/Typ	e Dispositio	n Item Value	Item IS Evidence?	Owner Identified/Known?	Organization Owned By	Person C	
	laptop	Laptop	Corporate Prop	e Seized As Ev	ide \$ 2,135.00	V		Sydney Police Service	Woods, Vie	
	4				111				•	
			Item Nan		с. т					
			Laptop	1e	Category/Type Corporate Prop	perty/Lanton				
						or yr captop				
			Item Valu	s 2.135.00 U	Make/Model SD Dell/Inspiron E	1705				
		-		\$ 2,135.00 0	SD Dell/Inspiron E	1705				
		Contraction of the local division of the loc	Dispositio		Serial Number					
			Seized /	As Evidence	XTP-400S					
	0.									
	-									

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.

- 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**.

e l	Attachment Manag	er				- • ×
	Drag and drop files b	elow			- or -	Browse
	Remove	Attachment Title	Attachment Type	Include when printing?	De	scription
	Remove					
	Attachment Title					
	Attachment Type	-	Include when printing	1?		
	Description					
	File Name File Extension File Size					
					OK	Cancel
R	eady					.::

 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.

Ok Close General Responses Requests Involvements Attachments Add New Edt Remove View Total Attachment Title Attachment Type File Name File Extension File Size Description Dell Inspiron E1. Picture bullet jpg 1 KB Photo of the stolen laptop. 	🖉 Edit Activity: ACT1-2011-000413		
Add New • Edit • Remove • View Total Attachments: 1 Attachment Title Attachment Type File Name File Extension File Size Description Dell Inspiron E1_ Picture bullet jpg 1 KB Photo of the stolen laptop.	Ok Close		
Total Attachments: 1 Attachment Title Attachment Type File Name File Extension File Size Description Dell Inspiron E1_ Picture bullet .jpg 1 KB Photo of the stolen laptop. Owrnloading Dell Inspiron E1705 Opening bullet .jpg Transferred 1 Kb / 1 Kb Save Ae Open	♦ General ♦ Responses ♦	Requests Involvements Attachments Assignments	
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e .	0 .	Downloading Dell Inspiron E1705 Opening bullet jpg Completed Transferred 1 Kb / 1 Kb Save As Open	

Give an Activity-Related Assignment

- 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.

🖶 Add New Record		
OK Cancel		
Assignment Type Information Request Assigned Date 19/09/2011 02:45 PM Due Date 20/09/2011 02:45 PM Completed Date	Assigned By Person	₽ X ₽ X
Message/Task Background check on Jeff Brown.		× v

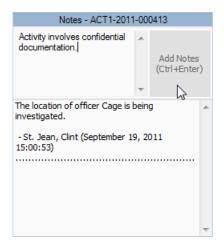
🕘 Edit Activity: /	ACT1-2011-000413	3				
Ok Clos	2					
General	 Responses 	♦ Requests ♦ I	nvolvements 🔷 Attac	chments 🔷 Assignm	ents	
Add New	= Edit = Remo	ove Notify				
Total Assignmen	ts: 1 Completed /	Assignments: 0				
Completed?	Assigned Date	Assignment Type	Assigned By Person	Assigned To Person	Message/Task	
	19/09/2011	Information Request	St. Jean, Clint	Campbell, Keith	Background che	
Vinimi						
	0/09/2011 2:49:16	PM - LM: Clint - N/A				
Unit - Is	// 03/ 2011 2.40.101	FINE LINE CHELL IN A				

- 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**.

🙀 Send Message				
Mail				
	ABC	🜓 To: ch	narlene.czirfusz@ppm2000.com	
Send Attachments Priority Cut Cop		🖶 Cc: rar	ndy.whillier@ppm2000.com	Format
	·	Subject: As	ssignment Reminder (Description: ACT1-2011-000413)	
Mail Document	Edit		Mail Properties	Options
Send ment Details				^
Assignment Type II	nformation Request		Add \ Remove Attachments	×
Assigned By S	St. Jean , Clint		Proceed	🖶 Add 💢 Remove
Assigned To C	Campbell, Keith		File Name	Size
Assigned Date 1	19/09/2011 2:45:00 PM		brown.jpg	935.83 KB
Due Date 2	20/09/2011 2:45:00 PM			E
C o mple te d?				
Completed Date				
Message/Task E	Background check on J	e ff Brown.		
Activity Details for ACT1-2011-000413				
Reported Date/Time	19/09/2011 10:4	9:53 AM	L	
Call Category	Activated Alarm			
Location				
Geo Rollup				
				Ψ

Add Activity Notes

- 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

- 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 <u>"Create a New Basic Activity Record"</u>).
- If required, edit the subject and the text of the original message. If you want to format the message details in plain text rather than the default HTML table, *unclick* the Format button. By default, the formatting option is active.
- 3. Click **Check** to check the spelling of your message.
- To add an attachment to your email, click Attachments. A window will appear where you can add attachments by clicking Add, selecting the file you need and clicking Open. Click Proceed to return to the main message screen.
- 5. Specify the recipients' email addresses. You may type in a recipient's email address directly into the **To** and/or **CC** fields, or import a contact from Perspective's database by clicking To and/or CC and selecting a person from the displayed Entity List. The Entity List will be

populated with user records that contain an email address with the **Primary Email** box checked.

- 6. To set a priority for the message you are sending, click **Priority** and select from *High*, *Normal* (default) and *Low* priority options.
 - 🚳 Send Message Mail 🖶 To: k_r_whillier@shaw.ca ABC -R ന്റ 4 + Cc: mj.parker@heros.com Send Attachments Priority Cut Copy Paste Check Format Subject: Record Details (Activity Number: ACT-2011-09-00080) Mail Properties Mail Document Activity Details for ACT-2011-09-00080 🔄 🛛 🗛 🖉 🕹 🕹 🛃 🛃 🛃 Priority Important 📫 Add 💥 Remove Proceed Reported Date/Time 13/09/2011 12:10:23 PM File Name Size Assigned Date/Time image016.jpg 838 Bytes Closed Date/Time Location ome University/Administration Building Address 1112 University Drive Administration Building Canada/Aberta/Edmonton T1A 2B3 Cal Taken By Woods, Victoria Remnyakova, Svetlana A Dispatched By Record Owner Description The fire alarm sounded at 9:58 am. Most staff evaou Ine the alarmisounced at x0x am invost same valuated the building by 10:20 am Employees working at Level 7/Section 2 discovered that their fire exit had been blocked, so they had to wak to the dthers ide of the building to find an exit. This deleyed their execusion by 10 minutes. The situation requires a thorough facility check.
- 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 <u>"Create and Manage an Activity"</u> 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 <u>"Dispatch Activities"</u> 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.

Close A	Activity	
ОК	Close	
	Report Required? No Yes Record Owner: Record Owner:	
	f an Owner is not specified, the first responder will be assigned. Dotional)	
	due to inactivity.	

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 <u>Officer</u> Statuses. For example, if the custom value "On Lunch Break" is added, this status applies only to Officers and <u>not</u> 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.

On Duty Officer Ok Close								
Wayne	Search	Officer Name	Team	Call Sign	Last Known Position]	Assign Workgroup	-
All Workgroups		Wayne, Bruce 1	Team 2					
MS01 Vorkgroup J Vorkgroup B Vorkgroup A Vorkgroup H	*							
							}	
	-					6		

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

Update Call	Sign for Wayne, Bruc	e (×
Ok	Close		
Call Sign PPM-004 PPM-005 PPM-006 PPM-007 PPM-008	5	▲ 	
Notes (O Call Sign (

- 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.

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

Dispatch an Officer for an Activity

- 1. Select an Activity record from the Activities pane.
- 2. On the Available pane, select an officer that you want to dispatch for the selected activity and click ³ **Dispatch Officer** on the toolbar. Alternatively, drag the Officer record from the Available pane to the Activity record.
- 3. The Officer record will move from the Available pane to the Assigned pane and will be supplied with the relevant dispatch **Activity Number**. The **Time Elapsed** cell on the Assigned pane will start counting the time the officer has been registered in the *On Route* status. The Activity record will also be updated with the dispatched **Officer Status**.

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Start	Sche	dule Op	tions															~ (
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Start /	Close Activity I Dispate	On Off Duty Duty	Dispatch Officer	Dispatch Organization				Activity Details	Officer Log	Attachment Record	SOP Refr	esh V	Location	Status		allSign	Workgroup Filter	s Activity Notes
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SOP?	Ac	tivity Numbe		Priority 🖓	Officer Sta	atus 🗸 🛛 RTA	Alert		Fime naining	Call	Category		Y	Locatio	n	V	Off Site	Reporte
	CEN	2011-10-00	008	Low	Waiti	ıg					Alarm		Asis	Convent	ion Cente	r		07/
	CEN	2011-10-00	007	High	Waiti	ng					Alarm		Asis	Convent	ion Cente	r		07
	CEN	2011-10-00	005		On Ro	ute				Security Direc	ted Activity/	/Facility	c	entral Ci	ampus			07
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1	Time	Team 7	Call Sign		rganization Ime	Status	√ 1	Assigne	Time Elapsed	∀ Team ∀	Call Sign	7 Office	r/Organizati Name	on A	Status	V	Activity	Number
	4d 1h	P2	512	Hoyt, Craig		Available		8	4d 1h	P2	130B	Georg	ie, Sarah	C	On Scene		CEN-2011	-10-00001
	3d 23h	P4	C300	Rosenburg,	Brian	Lunch - 30		8	00:02:10	P4	C322	Shant	z, Gregg	C	On Route		CEN-2011	-10-00005
	4d 1h	P4	C330	Rutherford,	Justin	Out of Service		8	00:01:45	P4	C325	Kenne	dy, Frank Jr.	C	On Route		CEN-2011	-10-00002
	4d 1h	P2	131B	Camillo, To	ny	Busy												
			1				•	•			1						_	
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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.

5									Perspe	ctive Dispatchl	log									
Start	Sch	edule	Opti	ons																۵ 🗯
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Start	Close Activity	On Duty	Off Duty	Dispatch Officer	Dispatch Organization	Arrive	Arrive C	ear Clear All	Activ		Attachment	SOP	Refre	sh V	Location	Status	Mail	CallSign	Workgroup Filter	s Activity Notes
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50P?	A	ctivity	Number		Priority 🗸	Officer St	atus 🗸	RTA Aler	t	Time Remaining	Cal	l Cate	jory		V	Locat	ion	V	Off Site	Reported
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8	4d 1h	Р	2	131B	Camillo, Ton	Y	Busy		8	00:02:36	P2	137	з	Owens	, Derek		<u>On Hold</u>		CEN-2011-	10-00007
8	4d 1h	P	2	136B	Hill, Gregg		P-ST	·	8	00:01:17	P2	137	3	Owens	, Derek		On Rout	e	CEN-2011-	09-00122
(•	•											
114	39 AM																			

• **Cancel**: Cancel the dispatch action and leave the officer's involvements unchanged.



3. Following the patterns and status modification principles described above you may dispatch one officer for as many consecutive activities as necessary. Note 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** *I*.
- 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.

							Pe	erspectiv	e Dispatch	Log									
Start	Sched	lule Op	tions																۵ (
Start		Dn Off Juty Duty	Dispatch Officer	Dispatch Organization		rive Clear Cle	ear All	Activity Details		Attachment Record	SOP	Refres		Location	Status	Mail	CallSign Log	Workgn Filte	oups Activity
tivitie	5																		
SOP?	Act	ivity Numbe	r I	Priority 7 O	fficer Stat	us 🛛 RTA /	Alert	Re	Time maining	G	II Cate	gory		Reported D	ate/Ti	me	Organiz Stat	ation ₇	Description
	CEN-2	2011-10-00	009	Medium	Waiting						Alar	m		9:12	AM		On R	oute	
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vailable	e					ш		Assiane	d									_	_
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E	Time "	7 Team S		7 Officer/Orga Name Rutherford, Jus	e			-	Time	Ƴ Team ₽2		gn "	Officer, Owens,	Name		Status On Rout			ity Number 011-10-00003
E	Time Elapsed		Sign	Name	e	Status 🔨	V	V	Time Elapsed		V Sig	gn " B		Name			e	CEN-2	

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.

Start Scl	hedule (Options						spective Di	spateneog								
Start Close Activity Disp	On Off Duty Dut	Dispatch	Dispatch Organization	Arrive Arri Arctions	ve C	¢- ¢ Clear Clear All	Activit Details		Attachment Record	SOP Refresh	🖌 Highligh 🍸 Filter	t Overw View Location	Status	Mail	CallSign	Workgro Filter	ups Activity
ctivities																	
SOP?	Activity Num	ber	Priority V	Officer Statu	s V	RTA Ale	ert R	Time maining	Call	Category	V	Location		V	Organizati Status	on v	Reported Date
	CT1-2011-00	0414	Extreme	Waiting		0 %	-	03:59:22	Activ	vated Alarm					On Rout	te	22/09/20
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ailable Team V P2	Call Sign 1308	0413 I Officer/Orga Name Sieben, Jeff	nization e	On Route Status ✓ 文 vailable	Ass V	Team 🛆	, Call	✓ Office City o City o	Activ r/Organization Name f Waterloo	▼ Status On Route	ACT1-20	11-000414		Lo	On Rout		19/09/20 Time Elapsed

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 ^{2/4} 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.

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

You may allocate some statuses with the help of special toolbar icons. For instance, you may update an officer's/organization's status to **"On Scene"** by selecting their entry on the Assigned pane and clicking the **Arrive** icon ^{tool} 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 so 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 ⁽¹⁾ 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.

Up	date Location			
	Ok Cancel			
	Site			
	Acme University	Ŧ	Off Site	
	Building			
	Administration Building	Ŧ		
	Location			
	East Wing	-		
	Section			
	Front Entrance	Ŧ		
	Comments (Optional) The packet has been found on th	ie left	hand side of the front entrance.	

Update an Officer's Call Sign

- 1. Select an Officer record from either the Available or the Assigned pane.
- 2. Click the **Call Sign** icon 😳 on the toolbar. An Update Call Sign form will 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.

Up	date Call S	Sign for Wayne, Bruce	
	Ok	Close	
	Call Sign PPM-004 PPM-005 PPM-006 PPM-007 PPM-008		
	Notes (Op Call Sign c		

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.

- 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.

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

5. If no email notification has been sent yet, you can send individual email notifications from the Email Message tab. Specify To and/or Cc recipients of the notification, edit the Subject of the notification and the standard notification Message, and click Send. The form will capture the date and time the notification was sent.

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

6. If no mass notification has been sent yet, you can send a mass notification from the MIR3 tab using the MIR3SM inEnterpriseTM mass notification tool. Review the details of the mass notification and click Send. Each mass notification activity will be recorded under the Recipients 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.

Report Summa	ary							
Title:	Harper Building Evacua	tion one Time:	0	Status:	INITIATED			
Initiated By:	Emergency Notification	Expedited Delivery:	STANDARD	Issued:	11/10/2011 1:32:22 PI	м		
Туре:	BROADCAST	Report ID:	8516016	Completed:			Refresh	
Message Conte	ent					Statistics		
Message:	There is an emergency	situation in progress at t	the Harper Building in the	e Central Campus (1	865 105 Avenue).	Total Recipients:	10	
		10						
	For your safety please i	immediately evacuate the	e building and surroundi	ng area.		Total Contacted:	10	
Response:	I am safely clear of the		e building and surroundi	ng area.		Total Contacted: Total Responded:	0	
Response:		building. 1 now.	e building and surroundi	ng area.			0	
Response: Recipients	I am safely clear of the I am exiting the building	building. 1 now.	e building and surroundi	ng area.			0	
	I am safely clear of the I am exiting the building Help. I am unable to ex	building. 1 now.	e building and surroundii Device	ng area.	Status		0	
Recipients	I am safely clear of the I am exiting the building Help. I am unable to ex	building. g now. at the building. Responded	-	ng area. EMAIL_SENT	Status		0	
Recipients Name	I am safely clear of the I am exiting the building Help. I am unable to ex Issued yn 11/10/2011 1:32	building. now. at the building. Responded	Device	_	Status		0	
Recipients Name Duliba, Dary	I am safely clear of the I am exiting the building Help. I am unable to ex I ssued yn 11/10/2011 1:32 John 11/10/2011 1:32	building. now. it the building. Responded 2:	Device Daryn.Duliba@pp	EMAIL_SENT	Status			
lecipients Name Duliba, Dary Fernandes,	I am safely clear of the I am exiting the building Help. I am unable to ex I ssued yn 11/10/2011 1:32 John 11/10/2011 1:32	building. now. it the building. Responded 2: 2: 2:	Device Daryn.Duliba@pp John.Fernandes	EMAIL_SENT EMAIL_SENT	Status		0	

7. To save the changes made to the SOP form, click **OK**.

Display Activities Filtered by a Workgroup

By default, the Activities pane displays Activity records for all workgroups. To filter the records for specific groups only, click the **Workgroups Filter** icon ⁴/₃ on the toolbar and select just the workgroups for which you wish to display the activities. Click **OK** to confirm your choice.

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

Highlight Dispatched Officers/Organizations for Activities and Vice Versa

- 1. To review the officers/organizations assigned to a specific activity, select the corresponding Activity record on the Activities pane and click the **Highlight** icon <a>. All the dispatched officers/organizations that are related to the selected activity will be highlighted on the Assigned pane.
- 2. To review the activities assigned to a specific officer/organization, select the corresponding Officer/Organization record on the Assigned pane and click the **Highlight** icon <a>.. All the activities that are related to the selected officer/organization will be highlighted on the Activities pane.

C Sta	t Schedu	ile Or	otions					l	Perspec	tive Dispato	:hLog								<u>د د د</u>
Start	Close O Activity Du	n Off	Dispatch Officer	Dispatch Organization	Arrive	Arrive O All		Clear All	Activit Detail	y Officer	Attachment	SOP	Refresh	V Location	Status	Mail	CallSign	Workgroups Filter	Activity Notes
	Dispatch				Actions						Record						Log		
Activit			1							Time									
SOP	? Activ	ity Numb	er	Priority V	Officer S	itatus 🗸	RT	A Alert	R	emaining	Cal	l Catego	ry	Y	Locat	ion	7	Off Site	Reported Da
V	CEN-20	011-10-00	016	Low	Wai	ting		0 %			Alarm	/Fire/Pull	Station		Central	Campus			1:31
	CEN-20	011-10-00	015	Low	Wai	ting					Secu	rity Dire	cted						1:27
	CEN-20	011-10-00	008	Low	On	<u>Hold</u>	9	98 %		00:29:19		Alarm		Asi	s Conver	ntion Cen	ter		07/10/2
	CEN-20	011-10-00	007	High	Clea	ared						Alarm		As	sis Conve	ntion Cent	er		07/10/2
Γ				On R	On Route					Security Directed Activity/Facility Centra								07/10/2	
				On Scene					General Assistance/Assist					Central Campus/Building 🕕				07/10/3	
	CEN-20	011-09-00	152	Low	On S	cene					Gen	eral Assis	stance		Central	Campus			23/09/2
/aila	ble								Assig	ined									
	Time Elapsed ♡	Team	Call Sign	v Officer/0 Na	rganizatio ame	on St	tatus	▽ ^	V	Time Elapsed	∀ Team	⊽ Cal Sig	n v of	fficer/Organiz Name	ation _V	Statu	is V	Activity	Number
]	01:42:06	P2	512	Hoyt, Craig		Available		=	8	01:54:50	P4	C300	R	osenburg, Bria	1	On Sce	ne	CEN-2011	-10-00003
	02:05:52	P2	130B	George, Sa	rah	ilable		8	02:46:35	P4	C322	Sł	Shantz, Gregg		On Route	te	CEN-2011-	1-10-00005	
	02:05:56	02:06:01 P2 143B Holland, Ma		Kennedy, F	rank Jr. Available			lable		02:08:36	P2			Duorov, Alex Owens, Derek		On Scene Suspended		CEN-2011	-09-00152
	02:06:01							8	00:00:33	P2	CEN-2011							10-00003	
8	02:06:57							8	00:00:40	P2 137B Owe		Owens, Derek		<u>On Hold</u>		CEN-2011	-10-00008		
8	01:41:09	P2	135B	Faulds, Ian			lable		8	00:00:33	P2	137B	0	wens, Derek		On Rou	te	CEN-2011	-10-00015
	01:42:01	P2	S10	Dolby, Johr	n	Out	of Servi	ce 🗡	4									_	_
2	:10 PM																		

3. To cancel the highlight, de-select the Highlight icon.

Filter all Dispatched Officers/Organizations for One Activity

- To display a list of officers/organizations assigned to a specific activity only, select the corresponding Activity record on the Activities pane and click the **Filter** icon ♥. Only the dispatched officers/organizations that are related to the selected activity will be displayed in the Assigned pane.
- 2. To cancel the filter, de-select the Filter icon.

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Start	Schee	lule (Options																	۵	3
29	2 4	8	8	8 5	≞ ∳-	-	¢ <u>,</u> <mark>-</mark> ¢		1	Ê	Ø				۲	1	\bigvee	٩	-	-	
Start		On Off Auty Dut	Dispate Officer		Arrive	Arrive C All	lear Cle Al		Activity Details		Attachmer	t SOP	Refres	ih 🛄	Location	Status	Mail	CallSign	Workgroup Filter	s Activity Notes	
	Dispate	h			Actions						Record							Log			
Activitie	is .																				
SOP?	Act	ivity Num	ber	Priority V	Officer S	tatus 🗸	RTA A	lert	R	Time maining	(all Cate	gory	7	7	Locat	ion	V	Off Site	Reported D	ate
~	CEN-	2011-10-0	0016	Low	Wait	ting	0 9	6			Ala	m/Fire/F	Pull Statio	n		Central	Campus			1:31	. PM
	CEN-2011-10-00005		On Re	oute				Security Directed Activity/Facility Central			al Campus			07/10/	201						
	CEN-	2011-10-0	00003	High	On Se	cene					Gener	al Assist	tance/Assi	ist	Central C	ampus/i	Building 2	2 🕕		07/10/	201
	CEN-	2011-09-0	0152	Low	On Se	cene					G	eneral As	ssistance		(Central	Campus			23/09/	201
			_																		
•																					•
Availab	e								Assig	ned											
	Time , Elapsed	7 Team	⊽ Call Sign	⊽ Officer/Or Na	ganizatio me	n Sta	itus 7	7	V	Time Elapsed	∀ Team		Call 🛛 🖓	Office	r/Organizat Name	ion _V	State	15 V	Activity	Number	
8	01:45:40	P2	512	Hoyt, Craig		Availa	able	-	8	01:58:24	P4	C	300	Rosen	burg, Brian		On Sce	ne	CEN-201	-10-00003	Ĩ
8	02:09:26	P2	130B	George, Sar	e, Sarah Avai		able		8	00:04:07	P2	13	37B	Owens, Derek			Suspended		CEN-201	CEN-2011-10-00003	
8	02:09:30	P4	C325	Kennedy, Fr	ank Jr.	Availa	able	1	1												
2	01:45:35	P2	510	Dolby, John		Out o	f Service														
4								•	4			_	_			_	_	_			•
2:	14 PM																		This is	the data	C

View a Complete Officer Log

- 1. To view a complete log of activities recorded for a specific officer in the DispatchLog database, select an officer from one of the DispatchLog panes and click the **Officer Log** icon the toolbar.
- If you do not select a specific officer, you will have to specify the officer in the Officer Log Report field by clicking the Add icon . 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.

Close								
Wicer Log Report Dwens, Derek		ndition atus Change	Criteria Previous 30	Days 💌 Sea	ch Print]		
Activity Number	Officer Name	Change Type	Call Sign	Location	Status	Date/Time	Comments	
CEN-2011-10-00015	Owens, Derek	Status	137B	Central Campus/	On Route	11/10/2011 2:10:19 PM		
CEN-2011-10-00003	Owens, Derek	Status	137B	Central Campus/	Suspended	11/10/2011 2:10:19 PM		
CEN-2011-10-00008	Owens, Derek	Status	137B	Central Campus/	On Hold	11/10/2011 2:10:12 PM		
CEN-2011-10-00003	Owens, Derek	Status	137B	Central Campus/	On Scene	11/10/2011 12:16:02 PM		
CEN-2011-09-00122	Owens, Derek	Status	137B	Central Campus/	Cleared	11/10/2011 12:06:55 PM		
CEN-2011-09-00122	Owens Derek	Statue	137B	Central Campus/	On Route	11/10/2011 11:38:29 AM		

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 \mathbb{E} on the DispatchLog toolbar.

					Activities for Owens					×
🕷 🔳 🖶 🕱	Scheduled Enabled	Activity Number	Officer Status V	Time Remaining	Call Category 7	Z Location ♥	Call Taken By	ν 🕇	Address	V
SOP?	~	CEN-2011-10-00013	Waiting		Security Directed Activity/Facility	South Center/hg	Owens, Derek		Clear Filter	
✓ Scheduled Enabled	V	CEN-2011-10-00012	Waiting		Security Directed Activity/Facility	South Centering	Owens, Derek	5	/ (All)	
Activity Number		CEN-2011-10-00011	Walting		Security Directed Activity/Facility	South Center/hg	Owens, Derek		🔽 (Blanks)	
Priority E		CEN-2011-10-00014	Waiting	- 02:39:50	Lost &Found/Lost Property/Personal	150 King Str	Owens, Derek		Kennedy, Frank	
Øfficer Status	E	CEN-2011-10-00003	On Scene		General Assistance/Assist	Campus/Build	Owens, Derek		Whiessen, Ryan	
Time Remaining										
Z Call Category										
Z Location										
Off Site										_
Reported Date/Time									OK	Ca
Organization Status										_
Notes										

Perspective Visual Analysis

Welcome to Perspective Visual Analysis[™], an optional module of Perspective by PPM 2000[™]— the industry leader in Incident Reporting and Investigation Management software. Perspective not only records and tracks incident data, but assesses and analyzes it to chart trends and report statistics. Visual Analysis complements Perspective 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:

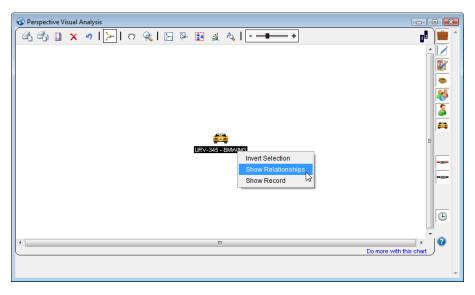
- Short link: <u>http://ibm.co/W8rK1l</u>.
- Long link: <u>http://www14.software.ibm.com/webapp/download/nochargesearch.jsp?S_TACT=&S_CMP=</u> <u>&s=&k=ALL&pid=&q=Chart+Reader+&ibm-search=Search&pf=&b=&q0=</u>.

Access Perspective Visual Analysis

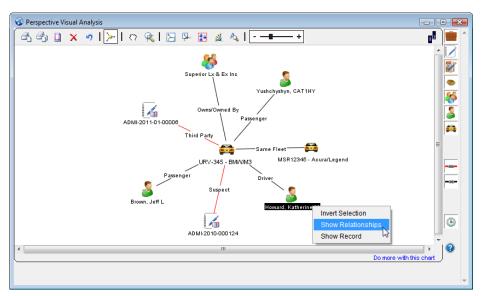
- 1. Log on to Perspective.
- 2. In the Navigation pane, open the **Data Forms** component and choose the record entity that you wish to view (i.e., Activities, Incidents, Cases, Items, Persons, Organizations or Vehicles).
- Set your record view for the Listing pane using the Quick View, Saved Views 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 a on the Ribbon. A separate window for Perspective Visual Analysis will open with the selected record displayed as an icon in the center.

Create a Link Chart

1. Right-click the icon in the center of the Visual Analysis window, and select **Show Relationships**.



- 2. A link chart of related records will appear in the window, with the original record at the center. Right-click any icon in the link chart, and then select one of the 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:

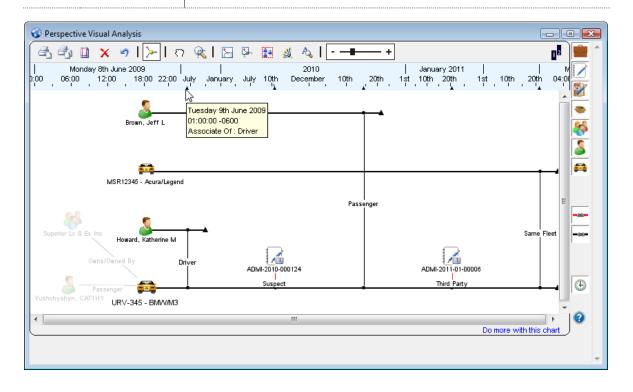
4	Print on Single Page	Prints all details of your chart on a single page.
ħ	Print at 100% Scale	Prints your chart at 100% scale, which would usually occupy more than one page.
D	Page Setup	Enables you to adjust margins and page setup settings before printing.
×	Delete Selection	Removes the highlighted record(s) from the chart.
2	Undo Delete	Brings back the record(s) that were just deleted.
۶	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.
n	Panning Tool	Enables dragging of the entire link chart allowing you to quickly view different areas of the chart.
R	Zoom to Area	Click the Zoom to Area button, and then click and drag on the chart to select an area with the help of the mobile zoom box. The window will fill with an enlarged display of the selected area.
۲	Fit to Window	Fits the entire link chart in the window, making it easier to see the overall shape and the number of connections in the chart.
<u>Þ</u> .	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.
2	Select All	Selects all the records in the link chart.
<u>s</u>	Reorganize	Changes the arrangement of the record icons restoring the link chart to its original layout.

Ą	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.
		Find Ext Suspect
		C Entities □ Exact Match C Links C Both OK Cancel
=- +	Zoom	Click and drag the slider back and forth to zoom the window in and out.

4. Click the buttons on the **right toolbar** to hide particular entities from your link chart. By default, these entities are displayed in your link chart. Click again to restore the original link chart layout and/or to re-display the entities.

	Case	Hides cases from your link chart.
	Incident	Hides incidents from your link chart.
?	Activity	Hides activities from your link chart.
	ltem	Hides items from your link chart.
<mark>85</mark>	Organization	Hides organizations from your link chart.
2	Person	Hides persons from your link chart.
	Vehicle	Hides vehicles from your link chart.
-30-	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.).
-35	Associations	Hides associations from your link chart. Associations, represented by black connecting lines, show that particular incidents, cases, items, organizations, persons or vehicles are associated with each other by relationship or ownership (e.g., Alias, Contracted To/By, Similar M.O., etc.).
٢	Timeline	Transfers your link chart into the timeline mode (see the image below). All entities and links will be reorganized sequentially, allowing for time series analysis.



Use IBM i2 ChartReader to Manipulate Your Link Chart

After using Perspective Visual Analysis to build and develop your link chart, customizing its appearance to suit your needs, you can use IBM i2 ChartReader to share your chart with other people in your organization, or at the very least, to save or print your chart for access at a later date.

If ChartReader is not already installed on your computer, you can download the product from the IBM i2 website:

- Short link: <u>http://ibm.co/W8rK1I</u>.
- Long link: <u>http://www14.software.ibm.com/webapp/download/nochargesearch.jsp?S_TACT=&S_CMP=</u> &s=&k=ALL&pid=&g=Chart+Reader+&ibm-search=Search&pf=&b=&g0=.

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.

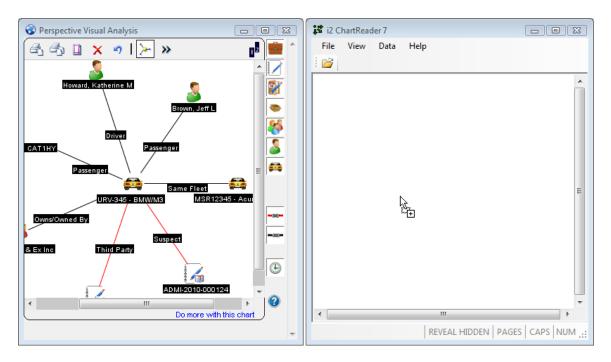
Ensure that your chart is complete when you transfer it into ChartReader, and then simply use ChartReader to:

- 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.

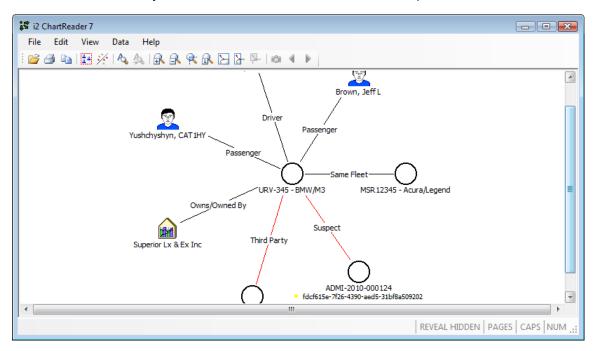
In other words, use Perspective Visual Analysis to create and develop your visual research, and then employ ChartReader to document it and distribute it to others.

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: <u>http://ibm.co/W8rK1I</u>.
- 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

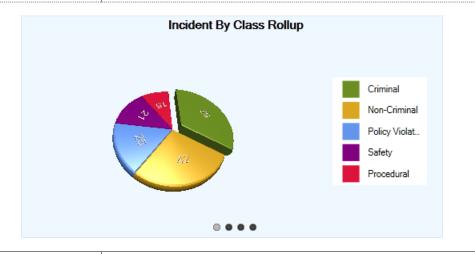
PPM 2000

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.

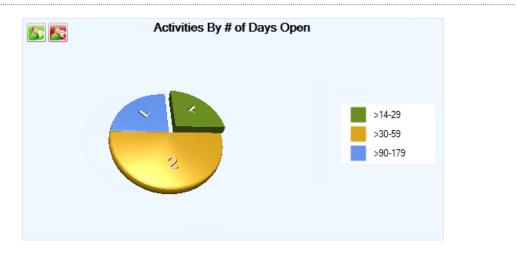
Incident by Class	Displays the number of incidents by the specified number of incident classes (e.g., Criminal, Procedural, Policy Violation, etc.) that have taken place during the specified period of time.
Incident by Business Unit	Displays the number of incidents by the specified number of business 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.

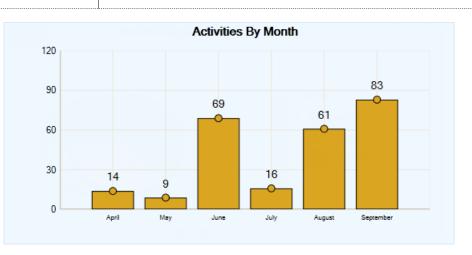
When one of these charts is displayed on the Dashboard, you may choose to view the Activity/Case/Incident/Investigation data filtered for a specific user. To filter the Activity data for a Record Owner, the Case or Incident data for a Case Investigator/Case Manager/Case Supervisor, the Investigation 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 is a constructed of the system.



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



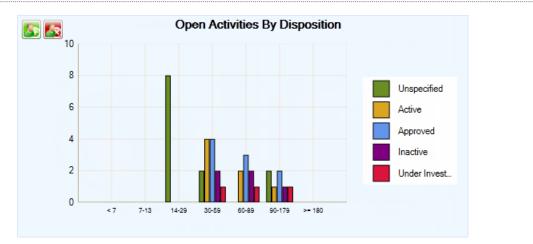
Shows the monetary losses (Total Loss, Total Recovered and Net Loss), in dollars, resulting from the selected portion of incident activity in each of the past twelve months of the specified year. This chart is only available in the Bar chart form.



Open Activities by
DispositionThis 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.).

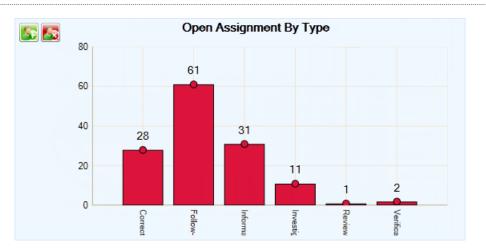
Open Incidents by Disposition	This pre-set chart does not have any further chart settings and is only available in the Bar chart form. Displays the number of incidents with an "Open" status colour-coded for specific Disposition (e.g., Unsolved) and arranged by the set periods of time for which the Incident 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 sin the chart section and select the required user from the entity list. To reset the filter and show the data that applies to all users in the system, click the x icon set.



Open Assignments by Due Date	Displays the number of assignments that have not been checked off as "Completed" arranged by their closeness to the Due Date (e.g., Overdue, Tomorrow, Others).				
Open Assignments by Type	Displays the number of assignments that have not been checked off as "Completed" arranged by specific assignment Type (e.g., Correction Notice, Information Request).				

When one of these charts is displayed on the Dashboard, you may choose to view the Incident, Case and Activity assignment data that have been filtered for a specific recipient of assignments. To filter the data for a specific "Assigned To" user, click on the plus icon sin the chart section and select the required user from the entity list. To reset the filter and show the data that applies to all users in the system, click the x icon set.

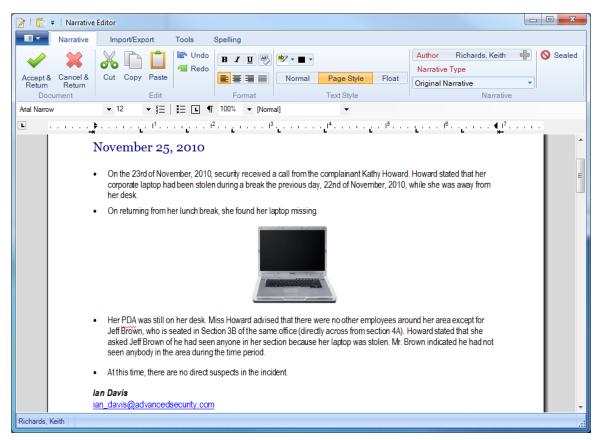


Resembles an automobile speedometer gauge displaying the
proportion of the number of incidents that has been recorded for the
current year to the number of incidents that had been recorded in the
year of your selection effectively comparing the two values. You can
change the "compared to" year using the chart's attached lookup.Perspective GaugeThe Total Year diagram compares the number of incidents for the
total calendar years (e.g., the periods of January 1 to December 31).The Year to Date diagram compares the number of incidents for the
years to the current date (e.g., if today's date is October 1, then it will
compare the periods of January 1 to October 1 only).The This Month diagram compares the number of incidents for the
current month (e.g., if today is October, then it will compare the
months of October only).



Appendix B: Text Editor Navigation

In Perspective, there are four types of text editor windows: **Narrative Editor**, **Summary Editor**, **Interview Editor** and **Send Message**. The corresponding editors enable entering and editing of (typically) large texts that convey incident or case narratives, investigation summaries and interviews, and descriptive email messages. Typing the content of a narrative, summary, interview or email, you can format your text with any of the options available under the editor's tabs (e.g., Narrative, Import/Export, Tools and Spelling).



Narrative/Summary/Interview tab



Click **Accept & Return** to save the changes made to the document and return to the main screen of the entry. If you 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.





Sealed

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

ABC	Although the spell check option is automatically applied to the text you
Check	enter (the incorrect text is underlined with a red wavy line), you can
Spelling	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 \blacksquare and radio buttons \odot . 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

18/08/2011 12:00 AM 📫 🏢 🗙

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).

1		Nove	mber,	2010		•	4	20	010	•	4	2010	-2019	
Sun 31	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Jan	Feb	Mar	Apr	2009	2010	2011	1
7 14	8 15	9 16	10 17	11 18	12 19	13 20	May	Jun	Jul	Aug	2013	2014	2015	
21 28	22 29	23 30	24 1	25 2	26 3	27 4	Sep	Oct	Nov	Dec	2017	2018	2019	
5	6	7	8 oday: I	9 03/11/	10 /2010	11	-4		lay: 03/11/2	2010		Tod	ay: 03/11/2	

After selecting a date, the calendar will close and the Date/Time field will automatically populate with the selected date, while the time portion will display 12:00 AM (or 00:00, depending on your machine's regional settings).

Note that at any time, you may select the current date by clicking the date marked Today at the bottom of the calendar, or by right-clicking the calendar and selecting "Go to today".

To clear the field of all values, click the Remove button imes to the right of the Calendar icon.

Lookup list fields

Security & Safety Systems

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

For more efficient data entry, you may automatically narrow focus in any lookup list to values beginning with the letters that you type. Simply start typing the value appropriate for the lookup field to display a lookup list containing only those values that **begin with** the letter(s) that you have typed.

Class		Class	
p	-	po	-
Policy Violation		Policy Violation	
Procedural			

Ŧ

If you are changing a lookup field value, you may hit the Esc key at any time to populate the field with the value that was saved previously. Note that if the lookup field is part of a hierarchy, any unsaved field values lower in the hierarchy may be erased.

Number fields

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

Perspective includes number fields for both whole numbers and numbers with up to two decimal places, as well as special fields configured for height, weight, value and year data.

In any of these fields, you may type the desired value directly in the field. If up and down arrows are available, you may use them to adjust the value by increments of one.

Pick list fields



Pick list fields can be populated with values linked from the common database. There are two ways to link a pick list field to a value from the database.

First, you may **start typing an approximate value** directly in the pick list field to display a list of records showing only those values that **contain** the letter(s) that you have typed. Note that this option is not available if you are selecting an Investigator.

Linked Person	Linked Person
🗓 Br 🧧	🖹 🔀 Brown, M
Abrams, Terry X	Brown, Mike
Bannner, Bruce	Brown, Murray
Bowman, Bryant	
Bowman, Bryanta	
Brown, Murray	
Hammond, Bradley	
Wise, Abraham	
Wise, Abraham	

Linked Person	
Brown, M	🖶 🗡
Brown, Mike	
Brown, Murray	

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.

🔝 Entity List		
•	▼ W	× 🗸 👌 🖶
🔒 Wysen, Aaron		
DOB: Unknown		Male
🕆 Woodsman, A	bbott	
DOB: Unknown		Male
🕆 Woods, Victor	ia	
DOB: 07/12/19	78	Male
🕆 Woods, Chuck		
DOB: 01/01/198	0	Female
🕆 Woods, Abel		
DOB: Unknown		Female
🕆 Woodcott, Jas		
DOB: Unknown		
🕆 Wolf, Abner		
DOB: Unknown		Male
		4 4 1/4 ▶ ▶
CView Details	Quick .	Add 🖌 Select 😧 Close

- If you have a default view specified for the data entity, this view will be displayed in the pick list. If not, the window will be blank. You may select or change the view by choosing a preset view from the Entity List lookup. To reset the view to display all records, click the green arrow icon
- To find a specific user in the list, start typing the name in the search field to automatically filter the user list by the letter(s) that you have typed. To apply the filter, click the checkmark icon
 To remove the filter, click the clear icon
 and then the checkmark icon, to view the original list.
- To arrange the list alphabetically, click the A to Z icon ³
- To print the list, click the Print icon

- To quickly view a particular entity's record, select the entity in the pick list and click the **View Details** button located at the bottom of the dialog box. The record will open in read-only mode in a separate window. Close the window to return to the pick list. Note 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 a blank data form will open in a separate window. Enter all known information, ensuring that all required fields (marked red) have been populated, and click Save when you are finished. The Quick Add form and the pick list window will close, and the field will populate with your entry. You can further edit your entity from there.

Note: The Quick Add function is only available in Item, Person, Organization and Vehicle pick lists. Further, some Person pick lists only allow persons designated as Perspective users, or Perspective users with specific privileges, to be selected; these pick lists do not offer the Quick Add function.

🕂 Quick Add Record								
🛛 🛃 Save 🛛 🐼 Cancel								
{ New Person }								
General Contact(s) Contro	ols							
	Title Mr. ▼ Date of Bith 25/08/1980 Eye Color Blue	H	Gender Male Hair Color Brown	Initial	Last Name Linch Marital V Marrie Height 5' 05"	Status ed ▼ Weight 165 lbs	Designation Ph.D.	
Additional Information								
						*		-

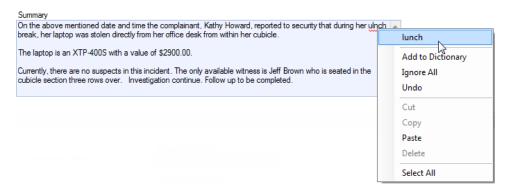
After populating a pick list field with a selected entity, you may click the **View Details** icon it to the left of the field to quickly view the entity's record. The entity's record will open in read-only mode in a separate window. If you are not authorized to view the entity's record details, you will receive a message indicating this and the record will not open.

At any time, you may click the **Remove** button \times located next to the Add button to clear the field of the current selection.

Text fields

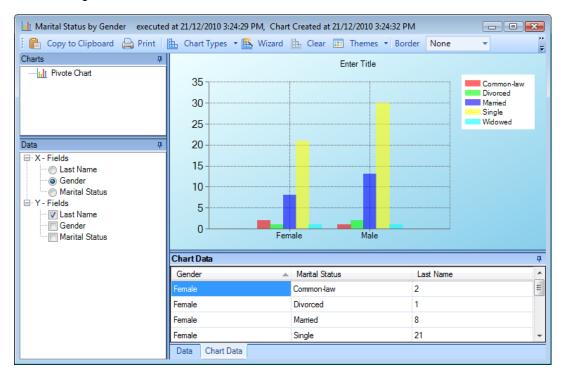
To enter a value in a text field, simply type inside the field. For additional options, including cut, copy and paste, highlight the applicable text, right-click and select the desired option from the menu.

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.

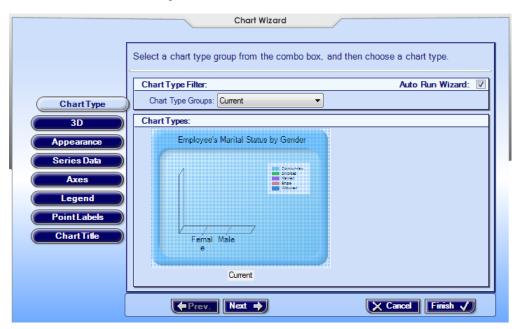
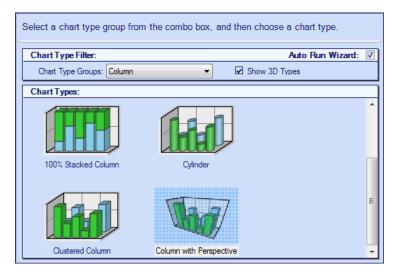


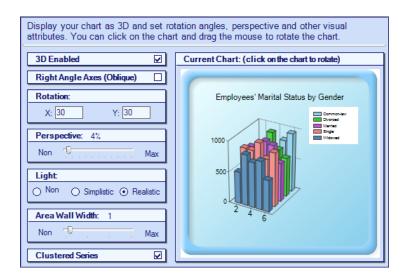
Chart Type

- 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

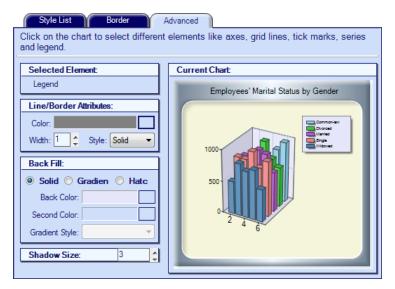
• Under the Style List tab, indicate what color scheme you would like to apply to your chart.

Style List Border Advanced Select chart appearance from the list.								
Appearance Styles: Current From Designer Earth Tones LightSteelBlue GrayScale SemiTransparent ExcelLike LightBeige Berry Chocolate Fire GreenBlue	Current Chart:							

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

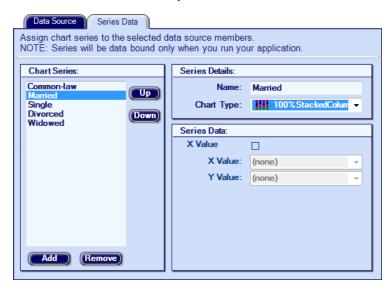


 Under the Advanced tab, select an element of the chart you would like to edit clicking on the chart image. In the Line/Border Attributes section, select the Color, Width and Style of the line border of the element. In the Back Fill section, adjust the chart elements' background colors and color schemes (Solid, Gradient or Hatch Background). In the Shadow Size section, set the depth of the shadow for the element.



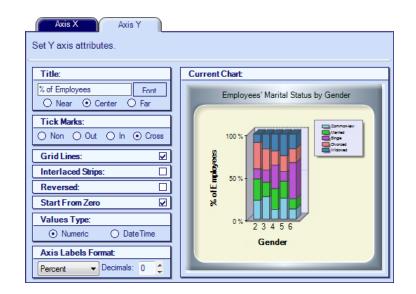
Series Data

• Under the **Series Data** tab, add, remove, move, rename and select Chart Types for the series variables included in your chart.



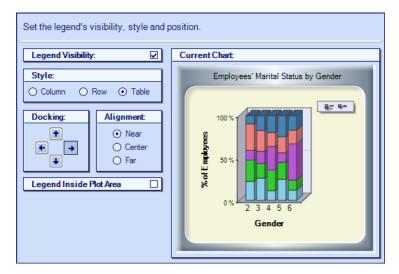
Axes

- 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.

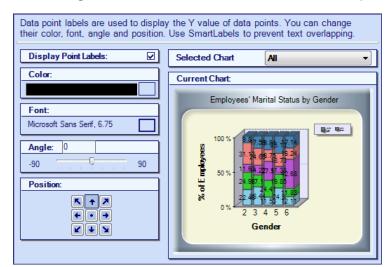
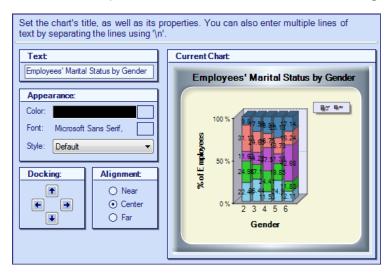
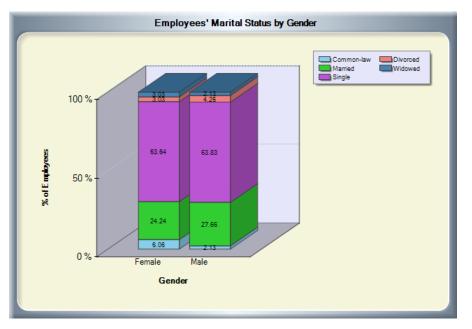


Chart Title

- 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

Α

Access Level84	1
Accessing DispatchLog177	7
Accessing Perspective	3
Action Toolbar	
Analysis Expert147	7
Perspective12	1
Activities	
About34	1
Add an Action Request108	3
Add an Officer's Response104	1
Add an Organization's Response106	3
Adding Attachments	3
Adding Involved Items196	3
Adding Involved Organizations193	
Adding Involved Persons See also	
Involved Persons	
Adding Involved Vehicles194	1
Adding Notes20 ²	
Adding Officers' Responses	
Adding Organizations' Responses 188	
Arriving Officers/Organizations21	
Assignments87	
Audit History90	
Building Visual Analysis Link Charts	
	3
Clearing212	
Cloning217	
Closing	
Creating	
Creating a Basic Record182	
Data Forms176	
Deleting202	
Dispatching206	
Displaying by Workgroups214	
Editing	
Emailing a Basic Record	
Escalating to an Incident record 115	
Filtering Dispatched	
Officers/Organizations	3
Giving a Related Assignment 199	
	-

Highlighting Dispatched
Officers/Organizations215
Involved ItemsSee also Involved Items
Involved Organizations See also
Involved Organizations
Involved Persons See also Involved
Persons
Involved Vehicles See also Involved
Vehicles
Linking to Incidents111
Linking to Other Activities110
Noting Action Requests188
Scheduling202
Security Controls112
Standard Operating Procedures114,
213
Viewing184
Viewing Log for an Officer216
Workgroup Access85
Activities Pane177
Activity Notes201
Adding from Source116
Administration13
All Records View44
Analysis Expert
About13, 147
Chart Wizard See also Chart Wizard
Criteria Designer 148, 152
Field(s)147
Form(s)147
Interface147
Query Design. See also Query Design
Query Results See also Query Results
Selections147
Tracking Query Runs157
Workflow Overview148
Archiving85
Arrive211
Arrive All211
Assigned Pane 177
Assignments
Emailing Notifications89

Exporting to an External Calendar	.30
Filtering and Grouping	.30
Mark Completed	.30
Attachment	198
Attachments	
Adding	.68
Printing	198
Audit History	137
Available Pane	177
Averted Loss	
Under Case	.97
Under Incident	.74
Under Involved Entity	.60

В

Boolean Logic Statement	144 ,	152
-------------------------	--------------	-----

С

Calendars236 Call Sign211 Cases
About
Adding Attachments68
Adding Data to Cases91
Adding Data to Incidents91
Assignments87
Audit History90
Building Visual Analysis Link Charts
Case Details Summary100
Closing92
Creating92
Data Summary100
Investigation Summary100
Investigations. See also Investigations
Involvement Summary101
Linking to Incidents
Linking to Other Cases96
Loss Summary102
Losses97
Narratives68
Reviews87
Security Controls84
Summaries68
Viewing Entities' Involvements53
Viewing Involvements94

Workgroup Access	85
Chain of Custody	
Chart Wizard	
3D	242
Appearance	
Axes	
Chart Title	247
Chart Type	
Finalizing	
Legend	
Point Labels	
Series Data	
Charts	
Analysis Expert Query Resu	ults166
Chart Wizard See also Ch	nart Wizard
Dashboard	
	27
Checkboxes	
	236
Checkboxes Child Data	236 154
Checkboxes	236 154 158, 160
Checkboxes Child Data Child Records	236 154 158, 160
Checkboxes Child Data Child Records Clear All Contact Information	236 154 158, 160 212
Checkboxes <i>Child Data</i> Child Records Clear All	236 154 158, 160 212 125
Checkboxes Child Data Child Records Clear All Contact Information Organizations Persons	
Checkboxes Child Data Child Records Clear All Contact Information Organizations Persons PPM 2000	
Checkboxes Child Data Child Records Clear All Contact Information Organizations Persons PPM 2000 Technical Support	
Checkboxes Child Data Child Records Clear All Contact Information Organizations Persons PPM 2000	

D

Dashboard	
About	12, 26
Assignments	
Chart Types	228
Charts	
Interface	26
Refresh Settings	14
Data Fields	
Date/Time	236
Lookup Lists	237
Number Fields	
Pick Lists	237
Text Fields	240
Types	236
Yes/No	
Data Forms	
About	12, 32

Activities
Cases
Common Record Functions43
Data Editing51
Data Entry
Incidents
Interface
Items40, 102
Organizations42, 131
Persons41, 120
Vehicles
Viewing Pane Main Toolbar51
Viewing Pane Sub-Tab Toolbar52
Workflow Overview
Dispatching
Officers See also Officers
Organizations. See also Organizations
DispatchLog
About176
Disposition85

Ε

e-Incidents	
Accepting	173
Assigning to Gateway Approver	173
Deleting	173
Editing	172
Exiting	
Folders	172
Pending for Later Review	174
Re-evaluation by Gateway	
Administrator	174
Rejecting	174
Saving	
Email Notifications	
Email Settings	15, 16
Entity List	
Evidence	
Case Investigations	80
Incident Investigations	80
Exiting Perspective	
Exit option	
Log off option	
Exposure	
Under Case	97
Under Incident	

Under Involved Entity60

F

. .

53
54
216
56
58
124
116

G

Η

Help	
Contents	21
Help files	12
Index	22
Search	23
Highlight	215
History	53, 118

I

Imported Reports	
Deleting	175
Displaying in XML	175
Folders	174
Making Available for Adding to	
Perspective	175
Incidents	
About	36

Adding Attachments	68
Assignments	87
Audit History	90
Building Visual Analysis Link Charts	
1	38
Causes	86
Corrective Actions	86
Creating	54
Creating from an Activity record1	
Flags	
Investigations. See also Investigation	ns
Involved ItemsSee also Involved Iter	ms
Involved OrganizationsSee al	so
Involved Organizations	
Involved Persons See also Involv	ed
Persons	
Involved Vehicles See also Involv	ed
Vehicles	
Linking to Activities	69
Linking to Cases	
Linking to Other Incidents	
Losses	
Narratives	
Noting General Details	
Noting Notified Authorities	
Outcomes	
Policies Affected	
Reviews	
Security Controls	84
Summaries	
Workgroup Access	
Infoglide Identity Resolution Engine	
(IRE)See also Custom Sear	ch
Interview Editor79, 2	
Interviews	
Case Investigations	79
Incident Investigations	
Investigations	
Assigning Investigators to Cases	93
Assigning Investigators to Incidents	
Case Evidence	
Case Interviews	
Case Investigation Summary1	
Case Investigative Data Summary	
Case Statements	
Case Summaries	

Closing	76
Incident Evidence	
Incident Interviews	
Incident Investigative Data Summa	arv
Incident Statements	
Incident Summaries	
Logging Case Tasks and Expense	
Logging Incident Tasks and Expense	
Noting Incident General Details	
Recording to Cases	
Recording to Incidents	
Investigators	
Assigning to Cases	02
Assigning to Incidents	
Involved Items	
Adding to Activities	
Adding to Incidents	
Incident Losses	
Loss Summary	
Viewing in Cases	
Involved Organizations	
Adding to Activities	
Adding to Incidents	
Incident Action Requests	
Incident Losses59	, 73
Incident Response	63
Loss Summary	59
Noting General Details	61
Viewing in Cases	94
Involved Persons	
Adding to Activities	56
Adding to Incidents	56
Clothing57,	191
Flags	
Incident Losses	
Injuries58,	
Loss Summary	
Noting General Details	
Viewing in Cases	
Involved Vehicles	
Adding to Activities	
Adding to Incidents	
Incident Losses	
Loss Summary	
L035 Summary	

Noting General Details	64
Viewing in Cases	94
Items	
About	40
Adding	115
Adding Attachments	
Adding from Gateway	
Audit History	
Building Visual Analysis Link Cha	
	138
Merging	135
Security Controls	
Viewing Involvements	118
Viewing Involvements in a Case	
record	94
Workgroup Access	120

Κ

Keyboard Shortcuts18	3()
----------------------	----	---

L

Legal Notice	.11
License Agreement	.11
Linking	
Activities to Activities	110
Activities to Incidents	111
Cases to Cases	.96
Cases to Incidents	.95
Incidents to Activities	.69
Incidents to Cases	.72
Incidents to Incidents	.70
Organizations to Organizations	128
Organizations to Persons	127
Organizations to Vehicles	129
Persons to Organizations	128
Persons to Persons	127
Persons to Vehicles	129
Vehicles to Organizations	128
Vehicles to Persons	127
Vehicles to Vehicles	129
Listing Pane	
Accessing Saved Views	.44
Creating Views	.45
Data Forms	.32
Deleting Views	.50
Displaying All Records	.44

Editing Views	47
Emailing Views	49
Filtering Record List	50
Gateway	170
Importing Views	48
Saving New Views	47
Lookup Lists	237
Loss	73
Losses	
Case Summary	.97, 102
Case's Average Averted	98
Case's Average Exposure	98
Case's Average Loss	98
Case's Average Net Loss	98
Case's Average Recovered	98
Incidents	73
Involved Item Summary	59
Involved Items	59, 73
Involved Organization Summa	ıry59
Involved Organizations	59, 73
Involved Person Summary	59
Involved Persons	59, 73
Involved Vehicle Summary	59
Involved Vehicles	59, 73

М

Main Screen1	1
MIR3 Mass Notifications213	3

Ν

Narrative Editor	68, 233
Narratives	
Cases	68
Incidents	68
Navigation Pane	
Analysis Expert	147
Data Forms	32
Gateway	170
Perspective	11
Reports	139
Net Loss	
Under Case	97
Under Incident	74
Under Involved Entity	60
No Impact Loss	73
Number Fields	

0

Officer Log	.216
Officers	
Bringing Off Duty	.212
Bringing On Duty	.206
Bringing On Scene	.211
Clearing From Activities	
Cloning	
Dispatching for Multiple Activities.	.208
Dispatching For One Activity	
Highlighting Assigned Activities	
Updating Call Sign	
Updating Status	
Viewing Officer Log	
Viewing/Updating Location	
Options Tab	
Order By	
Org Level	
Organizational Rollups	84
Organizations	
About	
Adding	
Adding Attachments	
Adding from Gateway	
Audit History	
Bringing On Scene	
Building Visual Analysis Link Char	
o	
Clearing From Activities	
Cloning	
Contact Information	
Dispatching	
Dispatching For Multiple Activities	
Highlighting Assigned Activities	
Linking to Organizations	
Linking to Persons	
Linking to Vehicles	
Merging	
Security Controls	
Updating Status	
Viewing Involvements	.118
Viewing Involvements in a Case	~ -
record	
Viewing/Updating Location	
Workgroup Access	.120

Outlook Sort By		162
Owner Workgroup	85,	182

Ρ

Password	
Changing	14
Persons	
About	41
Adding1	21
Adding Attachments	68
Adding from Gateway1	16
Audit History	
Building Visual Analysis Link Charts	
1	
Contact Information1	25
Employees1	30
Flags1	
Identification Documents1	23
Importing through Microsoft Active	
Directory1	21
Importing through Microsoft Outlook	
Contacts1	21
Linking to Organizations1	28
Linking to Persons1	
Linking to Vehicles1	29
Merging1	35
Security Controls1	30
Trespass Details1	24
Unique Features1	22
Viewing Involvements1	18
Viewing Involvements in a Case	
record	94
Workgroup Access	85
Perspective Components	12
Perspective Services URL	8
Pick Lists2	
Plus2	37
Policies or Procedures Affected	86
Printing	
Analysis Expert Query Results Char	ts
1	68
Attachments69, 1	
Query Results1	63
Record Lists	
Records	
Records from Analysis Expert1	64

Privacy Statement	11
Product Information	11

Q

Query Design	
Cloning	156
Creating	150
Deleting	156
Displaying Calculated Data	153
Displaying Raw Data	153
Editing Queries	
Editing Query Descriptions.	155
Grouping Results	153
Questions	150
Renaming Queries	155
Saving	155
Searching the Whole Datab	ase151
Searching within a Data Sar	mple 152
Setting Criteria	150
Sharing	156
Specifying Types of Data for	r Query
	151
Query Results	
Building Visual Analysis Linl	
	165
Calculating	
Charting	
Executing	
Exporting	163
Grouping	
Printing	
Printing Charts	
Printing Records	
Searching within Results	
Viewing	
Viewing Records	
Quick Add	
Quick Find	
Quick View	. 45, 48, 49

R

.236
85
44
53

Auditing Changes		
Creating		
Creating Views		45
Deleting		
Deleting Views		50
Displaying All		44
Editing Views		47
Emailing Views		49
Entity Edit Mode		52
Exiting		
Filtering on Listing Pane		50
Importing Views		
Locking from Editing		
Merging		
Opening Entity's Record		53
Printing		51
Record Edit Mode		51
Removing Entities		53
Saving		51
Saving Modified Views		48
Saving New Views		47
Sealing Entities		53
Searching	23, 2	5, 45
Sending		51
Unlocking		51
Unsealing Entities		53
Viewing/Reading Entities		53
Recovery		73
Refresh		. 180
Regulated Time to Act (RTA) .		. 183
Reports		
About	13	, 139
Administrator Only		
Criteria		143
Designing		142
Detail Reports		140
Emailing		146
Generating		. 145
Interface		.139
List		141
Lookups		. 141
Open Local		
Parameters		
Saving		.146
Summary Reports		
Types		

Reset V	/iew	179
---------	------	-----

S

Saved Views	
Schedule Tab	
Seal	53
Send Message	. 89, 233, 235
SOP (Standard Operating	Procedures)
Spell-check	
Start Tab	
Statements	
Case Investigations	79
Incident Investigations	79
Status	85
Status Bar	11, 178
Sub-tabs	52
Summaries	
Case Investigations	77
Cases	68
Incident Investigations	77
Incidents	68
Summary Editor	55, 77, 233

T

Technical Support	227
Text Editors	233
Text Fields	240
Total Loss	
Under Case	97
Under Incident	74
Under Involved Entity	60
Total Recovered	
Under Case	97
Under Incident	74
Under Involved Entity	60
Trespass Details	124

U

Unseal	53
User Defined Fields (UDF)	54
User Interface	

Analysis Expert147
Arranging Panes178
Dashboard26
Data Forms32
Description177
Filtering Entities179
Gateway170–69
Perspective11–10
Reports139
Sorting Entities179
User Privileges and Access Rights 13

V

Vehicles	
About	43
Adding	133
Adding Attachments	
Adding through Gateway	
Audit History	
Building Visual Analysis Link Charl	
	138
Company Property	134
Linking to Organizations	128
Linking to Persons	
Linking to Vehicles	
Merging	
Security Controls	
Viewing Involvements	
Viewing Involvements in a Case	
record	94
Workgroup Access	85
Viewing Pane	
Data Forms	33
Gateway	
Viewing Pane Toolbar	
Main	51
Sub-Tabbed	
Visual Analysis 138,	
W	

Workgroup Visibilities85



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