Perspective™

by PPM

QUICK REFERENCE CARD

Incident Management From Every Angle.™

Quick Tips

Keyboard Shortcuts

- Use Tab to move between the fields on a data form.
- Press Alt + ↓ to display a lookup list's options.
- Use the up and down arrows to scroll through lookup lists, or narrow the list of values by typing letters.
- Press Ctrl + Shift + L to log off Perspective.

Logging on to Perspective

1. Navigate to your Perspective URL.

2. Click the Launch Perspective button.

3. In the Logon window, enter the User Name and Password assigned to you by your Administrator. (If your system uses Windows® authentication, these fields will not appear.)

4. Click the Logon button.

Navigating Perspective

Switch between Perspective's components by clicking the buttons in the Navigation pane.

Dashboard

The Dashboard is Perspective's opening screen. Use it to track ongoing projects in the Assignments section, and quickly review incident trends and statistics in the Charts area.

DispatchLog

Enter DispatchLog to document a request for service all the way from initiation, to deployment, to response. Track your officers and real-time activity status.

Data Forms

Enter, update and review your Incident, Case*, Item, Person, Organization or Vehicle records in Data Forms.

*Case management is only available in the ICM and EIM editions of Perspective.

Analyze and Report

Use Analysis Expert to query records for specific data, and then turn your results into a printed grid, spreadsheet, chart, or report. Choose from a number of pre-configured reports to generate statistics and analyze trends in your data. With Custom Reports, you have the ability to take queries that you've built in Analysis Expert and customize their layouts in the embedded Report Designer.

Gateway

The 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.
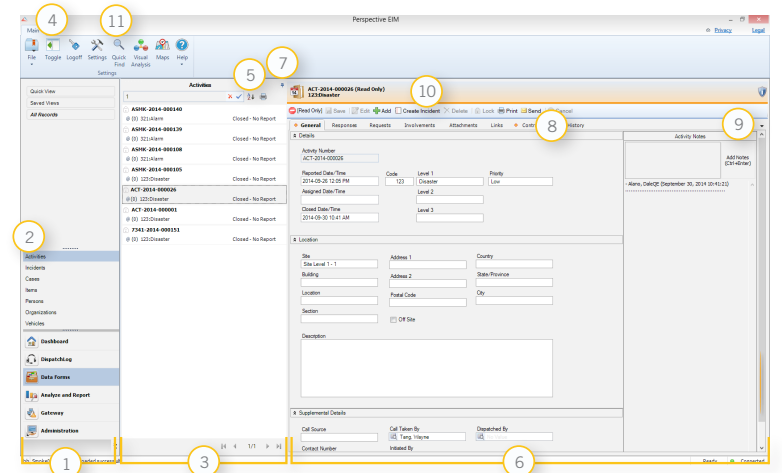
Quick Tips

Accessing Help

- Go to Perspective's Help menu, or click on the Help icon.
- Use the Contents tab to access relevant information, or find topics of interest with the Index or Search tabs.
- Look for words that are Hyperlink Blue. These link to other topics with related information.
- Find definitions of key terms in the Glossary.

Administration

Designated Administrators use this component to manage system settings, workgroups, roles, users, and more.

Data Forms

User Interface

Navigation Pane

The Navigation pane ① allows you to jump to other areas of Perspective (e.g., Dashboard, Analyze and Report, etc.) and to move between the various data form entities. By choosing a data form (e.g., Incidents) in the Navigation pane and setting your record view ②, a particular record subset is displayed in the middle Listing pane ③. To hide the Navigation pane, click the Navigation pane Toggle button ④. Click it again to make the pane re-appear.

Listing Pane

The Listing pane provides a list of records available to view. To help you manage your data, a number of toolbar options ⑤ are available for filtering, sorting, or printing the records list. Once you have selected a record in the Listing pane, the corresponding record information is displayed in the Viewing pane ⑥ on the right. To hide the Listing pane, click the Auto Hide (pin) icon ⑦. 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.

Viewing Pane

The Viewing pane displays a read-only view of the record selected in the Listing pane. Navigate between forms in the Viewing pane using the tabs ⑧ at the top, and access additional tabs by clicking the left/right navigation arrows ⑨ beside the row of tabs. To save record changes, edit a record, add a new record to the database, delete a record, lock a record from editing, unlock a locked record, print a record, email record details or exit a record without saving changes, use the available toolbar options ⑩.

Quick Find Tool

The Quick Find tool ⑪ searches text fields across your database (such as summaries, narratives, and text attachments) for the words or phrases that you specify, instantly tracking down the data you need.

Record Views

In order to view any records in the Listing or Viewing panes, you must first set a record view in the Navigation pane. To see all records with no filters applied, click All Records View. Or use Quick View to quickly display records matching only the criteria that you set. Access a previously stored record view, or create and save your own customized filtered record view, with Saved Views.

Create a quick record view for the Listing pane

1. Go to Data Forms and choose the record entity you wish to view (e.g., Incidents) in the Navigation pane.

2. Click Quick View. A window for specifying your record view parameters will open.

3. In the Field Name lookup list, select the field that you wish to set as the main criteria for narrowing your record view. Then choose an Operator for the field, such as Equal To, Greater Than, Begins With or Contains, and finally specify a Value. For example, if you are creating a Quick View of Incident records and your chosen Field Name is Class Rollup, you may select an Operator of Equal To (=) and a Value of Criminal to restrict your view to only those records classified as Criminal.

4. If you wish to include an additional field in your record view criteria, select one of the And/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.

5. 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.

6. Click the Preview button to generate a list of records meeting your set criteria in the order specified; then click Select to return to the Data Forms window and transfer your record view to the Listing pane.

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Report an Incident

Add the general incident details

1. Go to Data Forms and select Incidents in the Navigation pane.

2. Click the Add button on the Viewing pane toolbar.

3. Perspective will automatically assign an Incident Number when the record is saved.

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.

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

8. Specify where the incident occurred by making selections from the Site, Building, Location, and Section lookup lists.

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

10. Type a very 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.)

11. Click Save.

Identify persons, organizations, vehicles, or items involved in the incident

1. Select the Involvements tab, and then open the Persons, Organizations, Vehicles, or Items sub-tab.

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

3. Select the involved entity from the Linked Person, Linked Organization, Linked Vehicle, or Linked Item pick list, or if a record does not already exist for the entity, use the pick list's Quick Add function to create one.

4. Enter all the necessary details of the involvement.

5. Click OK, and then click Save.

Summarize the incident

1. Select the Narratives tab, and then click Add New. A pop-up window will open.

2. Choose the applicable description from the Narrative Type lookup list.

3. Type your narrative in the text box and use the available options to format the text.

4. Click Accept and Return, and then click Save.

Start an investigation into the incident

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

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

3. Enter the date the investigation was initiated under Investigation Start Date.

4. Input general notes in the Investigation Comments box.

5. Click Save.

Create an incident-related assignment

1. Select the Controls tab, open the Assignments sub-tab, and then click Add New. A pop-up window will open.

2. Choose the applicable option from the Assignment Type lookup list.

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

4. Select the user who must complete the assignment from the Assigned To Person pick list. (By default, your name will appear in the Assigned By Person field.)

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

6. Click OK, and then click Save. An Auto Notification pop-up window will appear.

7. To send an email notification of the assignment to the Assigned To Person, ensure the appropriate checkbox is selected and click Send.