:RESOLVER

PERSPECTIVE FOCAL POINT USER'S TRAINING GUIDE

Version 1.2

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Welcome to Perspective Focal Point*

Welcome to Perspective Focal Point™, an optional add-on to 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. With Focal Point, Perspective also has the ability to track advanced metrics for actionable business intelligence.

Using data drawn directly from your Perspective system, Focal Point's metrics charts allow you to quickly visualize the full scope of incident activity at your organization, so that you can pinpoint critical areas and determine where to focus your efforts. You can dynamically analyze your data to see the big picture, or drill down to see the minute details. Either way, Focal Point enables you to strategically mine your data for the business intelligence you need for effective, knowledge-based decision making.

Perspective Focal Point was developed in partnership with QlikTech™, the world's fastest growing business intelligence software company. It is powered by their flagship product, QlikView™. QlikView, an award-winning business intelligence solution, delivers powerful and intuitive business analysis, dashboards and reports based on patented association technology. QlikTech has more than 11,400 customers in 94 countries and over 800 partners worldwide.

For additional information on the features and functionality available in Perspective Focal Point, please consult the **Perspective Focal Point User's Guide**.

Logon to Get Started

1. Open Internet Explorer®.
2. Type the URL for your Focal Point logon page in the Address bar. Your Perspective Focal Point logon page will open.
3. Enter the User Name and Password assigned to you by your Administrator.
4. Click the Logon button.

* This document is only applicable to organizations that have purchased Perspective Focal Point, an optional add-on to Perspective by PPM 2000. If you are not certain that your Perspective system includes Focal Point, please contact Customer Service for verification.

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Explore Your Options

Each of the tabs in Perspective Focal Point contains a number of different chart types that have been configured to deliver a variety of essential metrics. In turn, each of these chart types can be customized to display particular subsets of data.

Depending on the tab and chart type selected, you may set a number of unique parameters for your chart's data, including the particular fields charted on the x-axis and y-axis, date filters, classification filters and more. Note that your selections will be applied globally, meaning they will affect all tabs and charts in Focal Point. For example, if you build a chart under the Frequency tab that is restricted to data from the year 2009, in turn, all charts throughout all of Focal Point's tabs will be restricted to data from the year 2009. You would need to clear this filter, or select additional years, to broaden the data displayed.

To navigate through Perspective Focal Point's features and functionality, just click on the tab corresponding to the data you want to chart, select a chart type and then use the available options to tailor the data displayed.

The following sections provide step-by-step training scenarios for working through each of Focal Point's tabs using the sample data that ships with the application.

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Dashboard

Perspective Focal Point's Dashboard enables you to monitor key metrics for increases or decreases in incident activity and loss.

Each of the three gauges allows you to compare a particular metric (e.g., Incident Count) over two separate time periods. The percentage change in this metric is calculated and then charted in the gauge's green or red zones, depending on whether the change is viewed as positive or negative. If the needle falls in the green zone, a positive change has taken place between the two time periods (e.g., Incident Count has decreased), and if the needle falls in the red zone, a negative change has taken place between the two time periods (e.g., Incident Count has increased). In all cases, the use of green or red to indicate positive or negative change depends on the data being compared. For example, increases in Total Loss are viewed as negative (red), while increases in Recovered Loss are viewed as positive (green).

For all three gauges, you can choose the data you would like charted (by changing the fields listed under Gauge 1, Gauge 2 and Gauge 3); you can specify the two time periods you want to compare (by setting the Measure Change By field to Year or Quarter, for example, and by choosing particular dates); and you can even modify the range of variance between your gauges' red and green zones (by adjusting the percentage value in the Change Warning Threshold field).

Let's practice...

1. Select the Dashboard tab.
2. Set Gauge 1 to Incident Count.
3. Set Gauge 2 to Total Loss.
4. Set Gauge 3 to Direct Loss.
5. Set the Change Warning Threshold to 30%.
6. By default, the Measure Change By field should be set to Year.
7. While holding down the Ctrl key, select 2008 and 2009 from the date filter area located above the gauges. (The Ctrl key allows you to select multiple options simultaneously.)

   Your gauges will now be comparing the changes in Incident Count, Total Loss and Direct Loss between the year 2008 and the year 2009.

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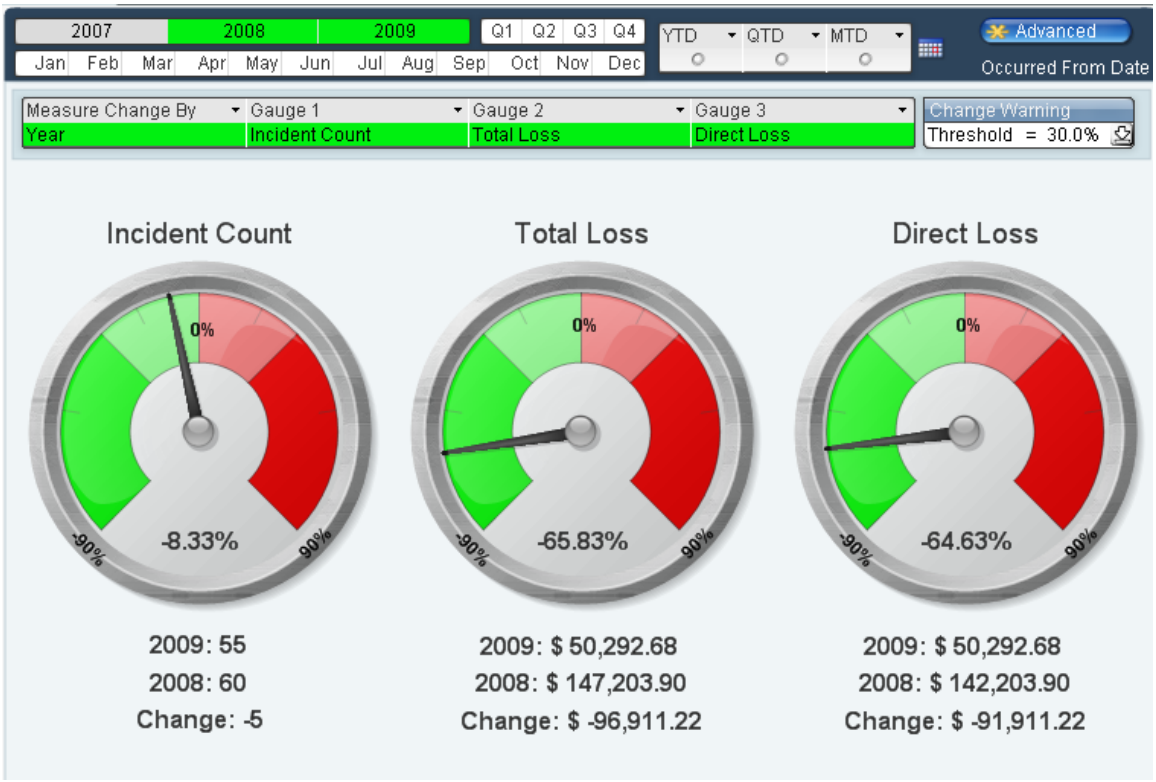
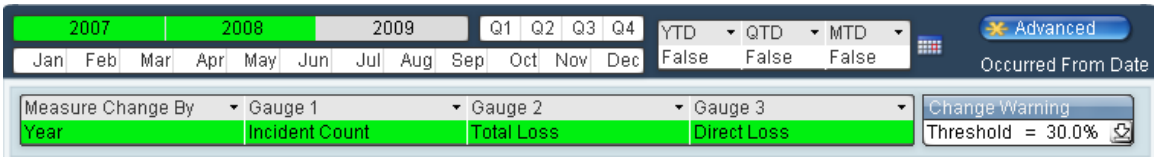


8. To modify the time periods being compared, select 2007; then, hold down the Ctrl key while selecting 2008. The 2007 and 2008 options should now be highlighted in green, indicating that they have been successfully selected.



9. Select Q3 from the date filter area above the gauges. All of your date selections will be highlighted in green, and your gauges will dynamically change to reflect your selections. (The gauges will now be comparing changes in Incident Count, Total Loss and Direct Loss between the third quarter of 2007 and the third quarter of 2008.)

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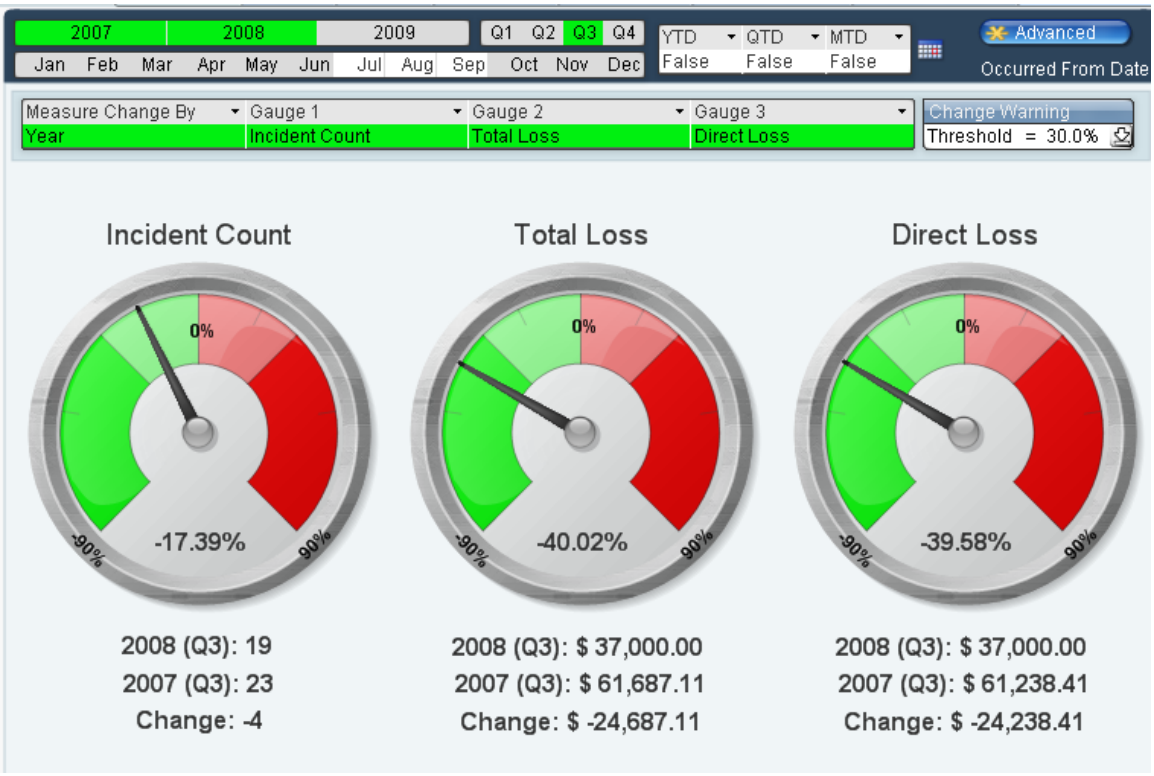

10. Return to your previous 2008–2009 comparison. To do so, click once on Q3 to de-select it, select 2009, and then hold down the Ctrl key while selecting 2008.

11. In the Classification filter box to the left of the gauges, select Criminal from the Class lookup list, and then select Theft from the Category lookup list. Your gauges will now be comparing Incident Count, Total Loss and Direct Loss between the year 2008 and the year 2009 for incidents classified as Criminal/Theft only.

12. Switch the value in the Measure Change By field to Quarter, and observe the changes in your gauges. Rather than comparing data from the year 2008 to the year 2009, the gauges will now compare data from the last quarter (Q4) in both 2008 and 2009, to the first quarter (Q1) in both 2008 and 2009.

13. Change the value in the Measure Change By field back to Year.

14. Select Q3 from the filter area above the gauges to compare data from the third quarter in 2008 to the third quarter in 2009.

15. Remove the Q3 filter.

16. Select Site C from the Site lookup list in the filter area on the left. The gauges are currently comparing data between the year 2008 and the year 2009 for Criminal/Theft incidents at Site C only.

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Question

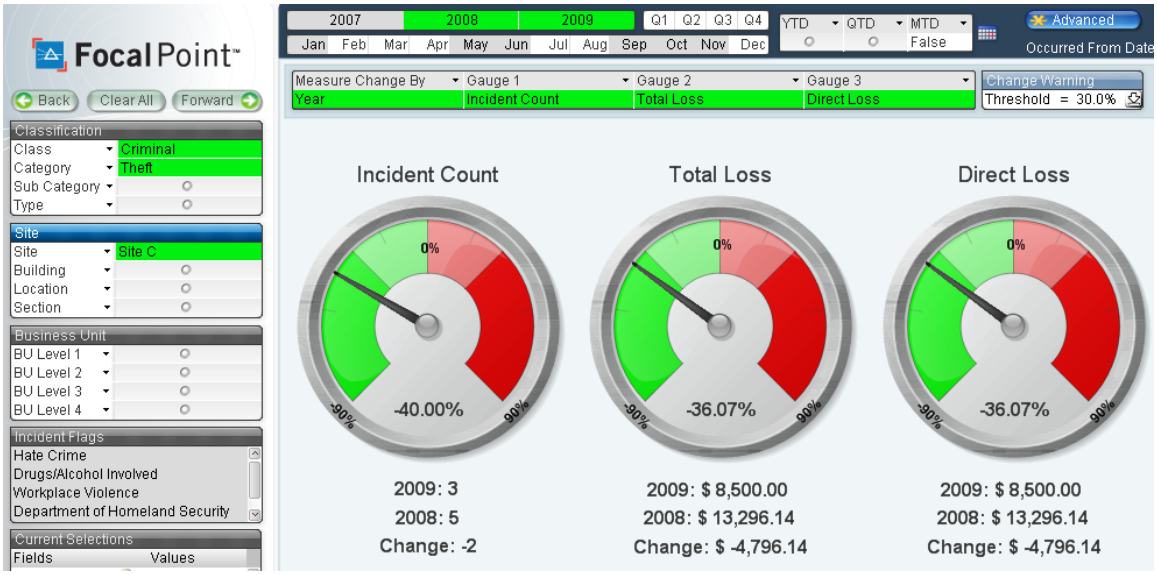
What percentage change is indicated on each of the gauges?

Answer

Incident Count: -40%

Total Loss: -36.07%

Direct Loss: -36.07%

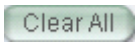


Trends

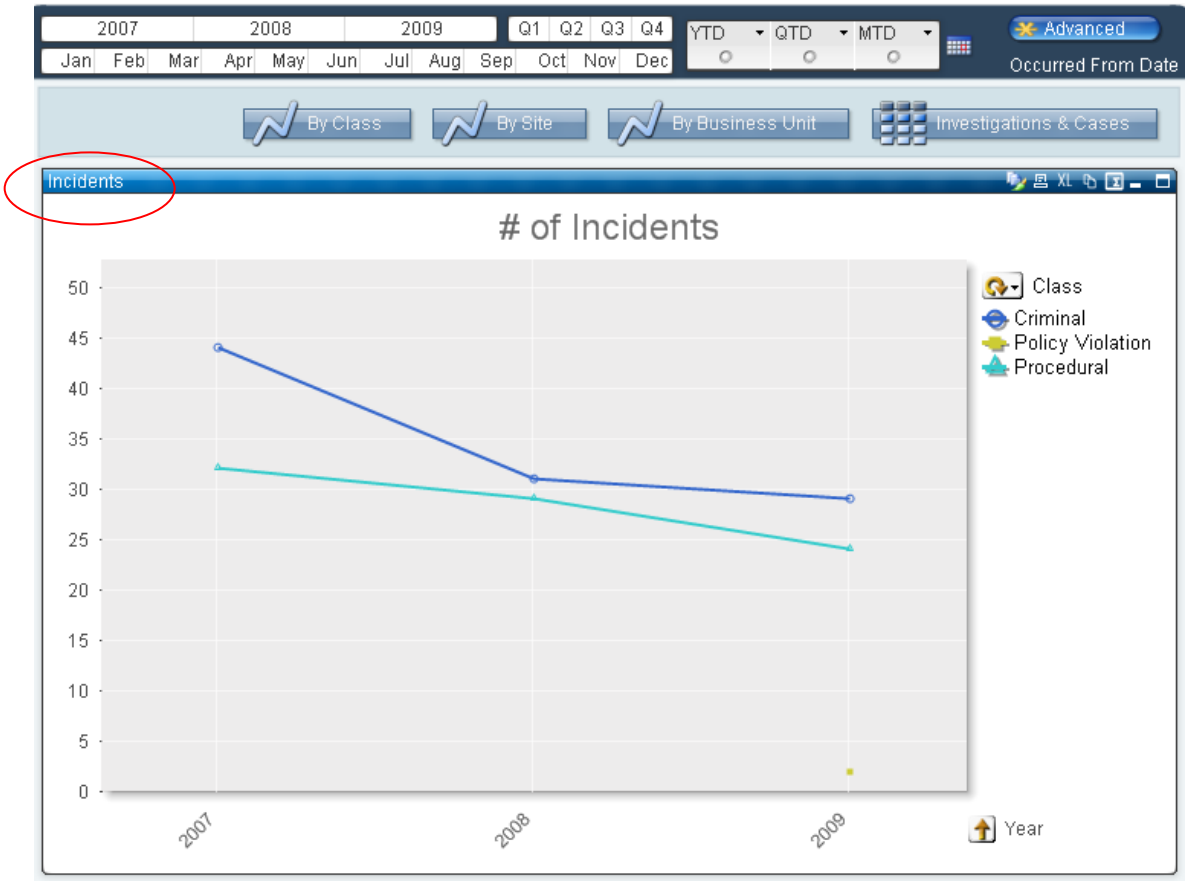
The charts available under the Trends tab provide a quick overview of general incident trends and statistics. There are five chart types in this section: Incidents, By Class, By Site, By Business Unit and Investigations & Cases.

Note that all the filters applied in the Dashboard have carried over to the Trends tab as well. All filter selections made in Perspective Focal Point are applied globally, meaning they affect all tabs and charts; keep this in mind as you move through the application.

Let's practice…

1. Select the Trends tab.
2. Click the Clear All button 

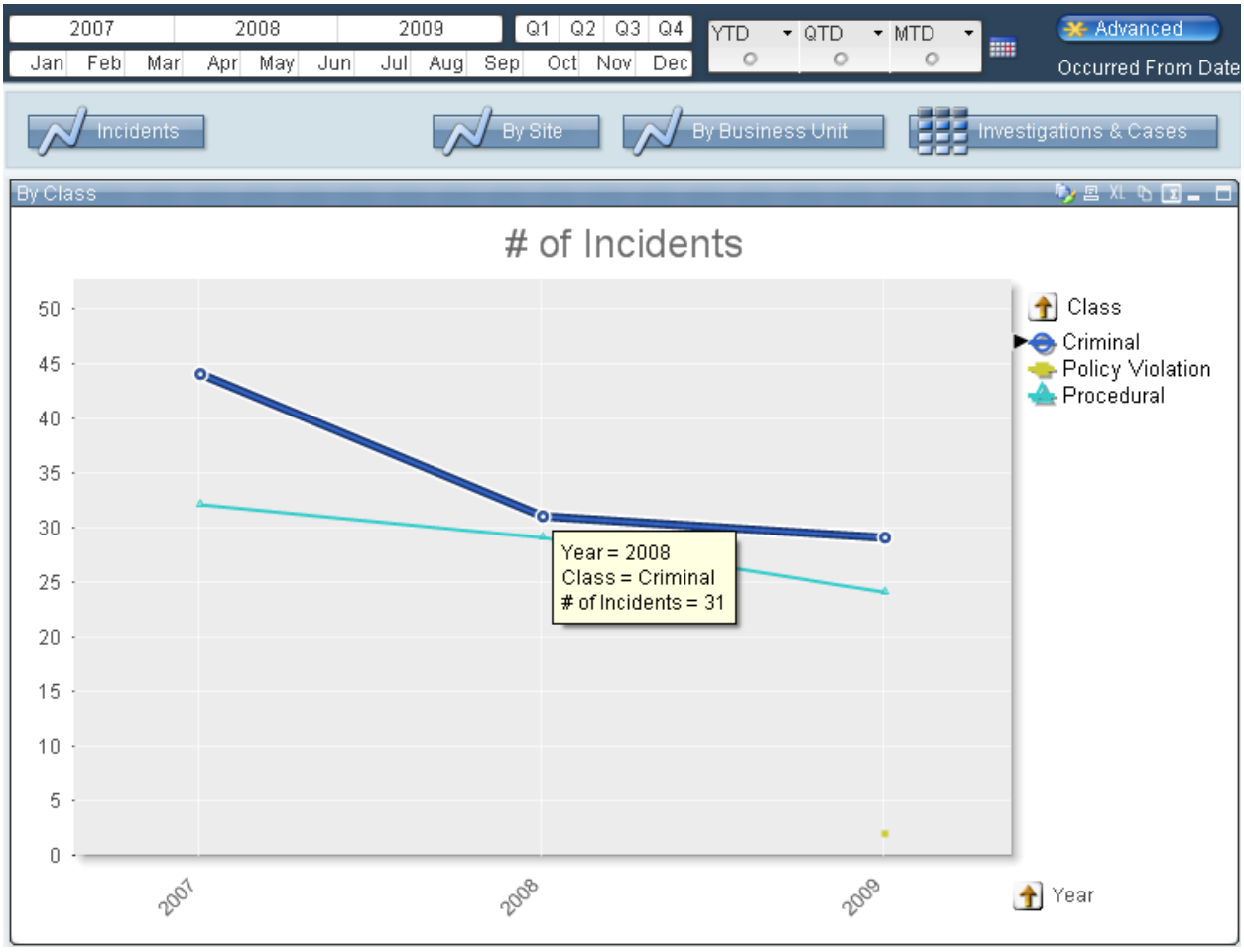
to remove all your filters and start fresh.
3. Double-click the Incidents button to select that particular chart type. Note that the Incidents button will disappear once it has been selected, and the name of the chart type (i.e., Incidents) will appear in the blue title bar above the chart.



4. Double-click the By Class button. Note that the Incidents button will re-appear, the By Class button will disappear and By Class will now be displayed in the blue title bar above the chart.

5. Return to the Incidents chart type. This line chart is illustrating the number of incidents that have taken place at the organization by class and by year.

6. Hover your mouse over the data point on the dark blue line intersecting 2008. A pop-up box containing the values charted by the data point will appear (Year=2008, Class=Criminal, # of Incidents=31). In addition, the blue line will highlight in bold, and an arrow will appear in the legend, pointing to the class represented by the blue line (i.e., Criminal).



7. Click on the data point you are hovering over. The chart will now zero in on the Criminal classification only, filtering out all other classifications previously appearing in the chart. Note that the only classification appearing in the legend will now be Criminal, as it is the only line on the chart, and the Criminal filter will be selected in the Class lookup list on the left.

8. Click once more on the data point intersecting 2008. The chart will now drill down into the year 2008, displaying data from that year only, broken down by quarter. Note the labels on the x-axis

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now read Q1, Q2, Q3 and Q4, and the 2008 filter option is highlighted in green in the date area above the chart.

9. Click on the data point intersecting Q3. The chart will now drill down into the third quarter of 2008, displaying data from that quarter only, broken down by month. Note the labels on the x-axis now read Jul, Aug and Sep, and the Q3 filter option is highlighted in green in the date area above the chart. (The Jul, Aug and Sep options are not highlighted in green in the date area because these options were not actively selected. However, as the months that comprise Q3, they will be included in the chart and, as such, they are highlighted in white. All data excluded from the chart, such as Q1, Q2 and Q4, and all the months that comprise these quarters, are highlighted in grey.)

Question
Q1, Q2, Q3 and Q4 are currently based on the calendar year. Can these be set up for an organization's fiscal year instead?

Answer
Yes. Under the Config tab (available only to Focal Point Administrators), the first month of the fiscal year can be selected, and under the Advanced tab, the DateMode field can be set to Fiscal.

Question
How many criminal incidents occurred in September 2008?

Answer
Six. (Hover your mouse over the point intersecting Sep to display the underlying data.)

10. Click on the data point intersecting September 2008. The chart will now drill down into September 2008, displaying data from that month only, broken down by day. Note the labels on the x-axis now indicate the precise date that each incident occurred (between September 2nd and September 25th).

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11. To find out more about each of the incidents in September 2008, including their Incident Numbers, open the Incident Details tab. (The Incident Details tab allows you to explore specific record details in-depth.)

Question

What are the Incident Numbers for each of the incidents in September 2008?

Answer

INCD0000000112, INCD…120, INCD…122, INCD…123, INCD…124 and INCD…129. (The six Incident Numbers are highlighted in white on the left side of the screen. Remember, in Focal Point, all selections are global, meaning that all the filters you applied under the Trends tab have carried over to the Incident Details tab. So, the six incidents that appeared on your previous Trends chart are the same six incidents highlighted in white under Incident Details.)

12. Click on INCD0000000112 in the Incident # list. It will now be highlighted in green, and all other Incident Numbers in the list will appear in grey, as their data has been excluded. The selected incident's details will be displayed on the right. Note that Involved Persons, Involved Organizations, Involved Vehicles, Involved Items and Loss Summary charts are also available on the right for further information.

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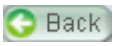
13. Return to the Trends tab. Note that the there is only one incident appearing on the chart now, the incident that took place on September 14th, 2008.

> Question
> Why is only one incident now visible on the chart?
>
> Answer
> When you selected INCD0000000112 in the Incident Details section, your selection was applied across all of Focal Point's tabs and charts. The only incident now charted under the Trends tab is INCD0000000112, which happened to occur on September 14th, 2008.

14. To return to your last data set (before you filtered down to INCD0000000112 only), hit the Back button. 

Once again, all criminal incidents occurring in September 2008 will be visible on the chart.

15. Open the Dashboard tab. The six criminal incidents that occurred in September 2008 will be charted on the three gauges; however, to see something meaningful, you will need to specify a second time period for the gauges to use as a basis for comparison.

16. Hold down the Ctrl key and select the 2007 option from the date area. The gauges will now be comparing Incident Count, Direct Loss and Recovered Loss between September 2007 and September 2008 for Criminal incidents only.

17. Return to the Trends tab.

Cycle Groups and Drill Down Groups

Throughout Perspective Focal Point, you will see cycle icons and drill down icons on various chart axes. These icons denote cycle groups (groups of fields that you can quickly cycle through to change the data appearing on your chart) and drill down groups (groups of hierarchical fields that you can drill down to quickly narrow your chart data and then drill back up to broaden your chart data).

Let's practice…

1. Double-click the Incidents button under the Trends tab.

2. Click Clear All.

3. Right-click the cycle icon located in the top right corner of the chart, and select Category from the list that appears. (Alternatively, you can left-click cycle icons to quickly cycle through all available field options.) A number of colored lines, one for each category, will appear on your chart.

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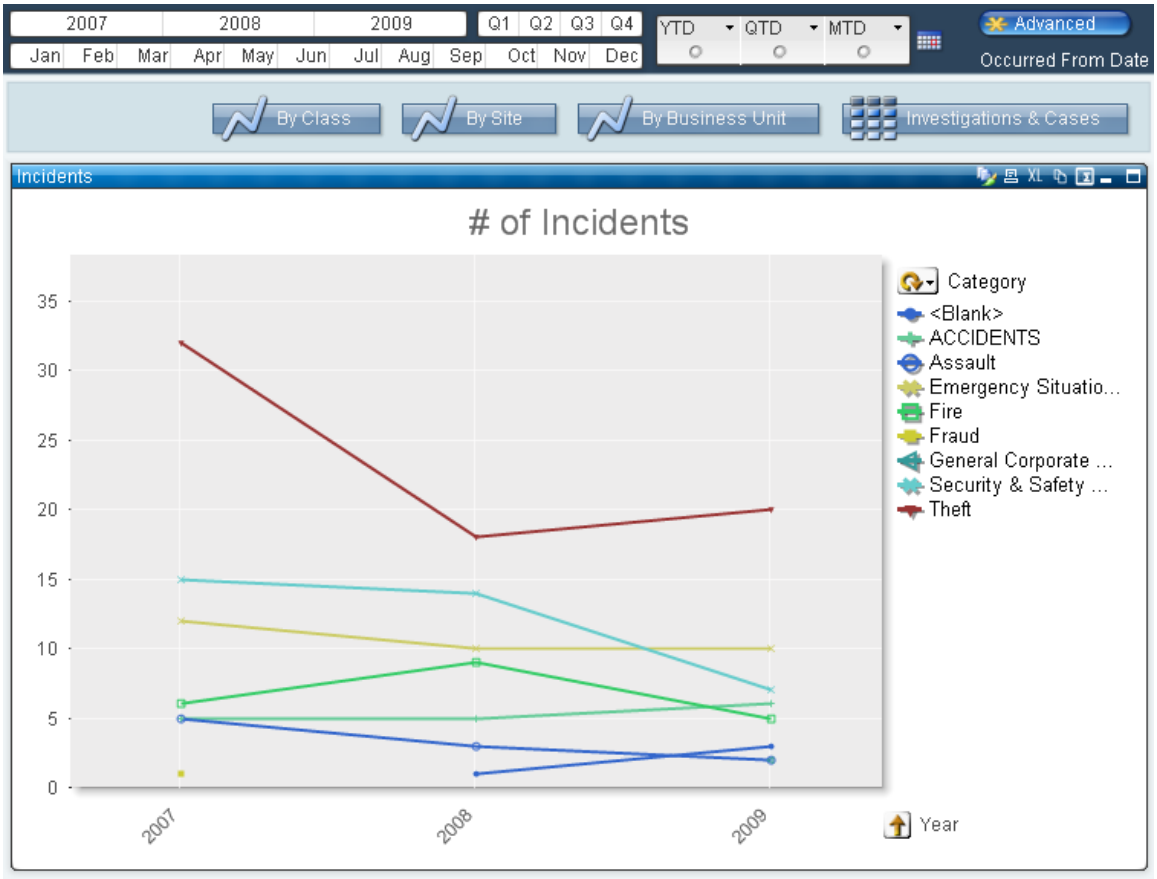

4. Since there are numerous intersecting lines on this chart representing a number of different categories, it may be difficult, even with the help of the legend, to pinpoint which line represents which category. To pinpoint a particular category, you can either hover your mouse over the appropriate line and look for the arrow in the legend, or you can hover your mouse over the category name in the legend and look for the bold chart line.

5. Hover your mouse over the Fire category in the legend, and look for the bold highlighted line on the chart.

6. Click on the Fire category in the legend (or click on a data point on the Fire chart line) to zero in on Criminal/Fire incidents only.

7. To determine where these fires have occurred, select the Site option from the cycle group.

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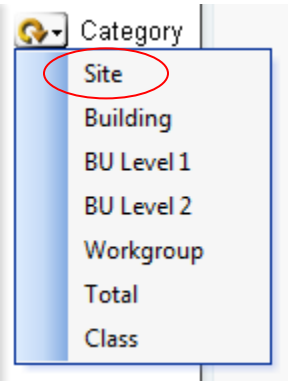
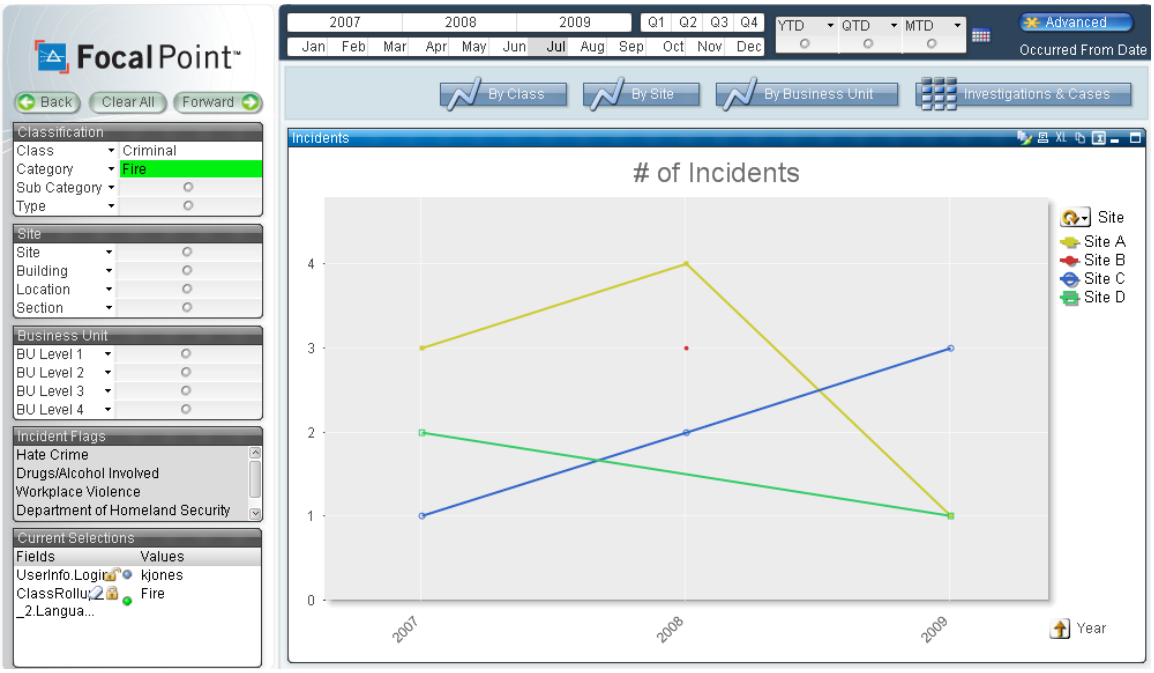
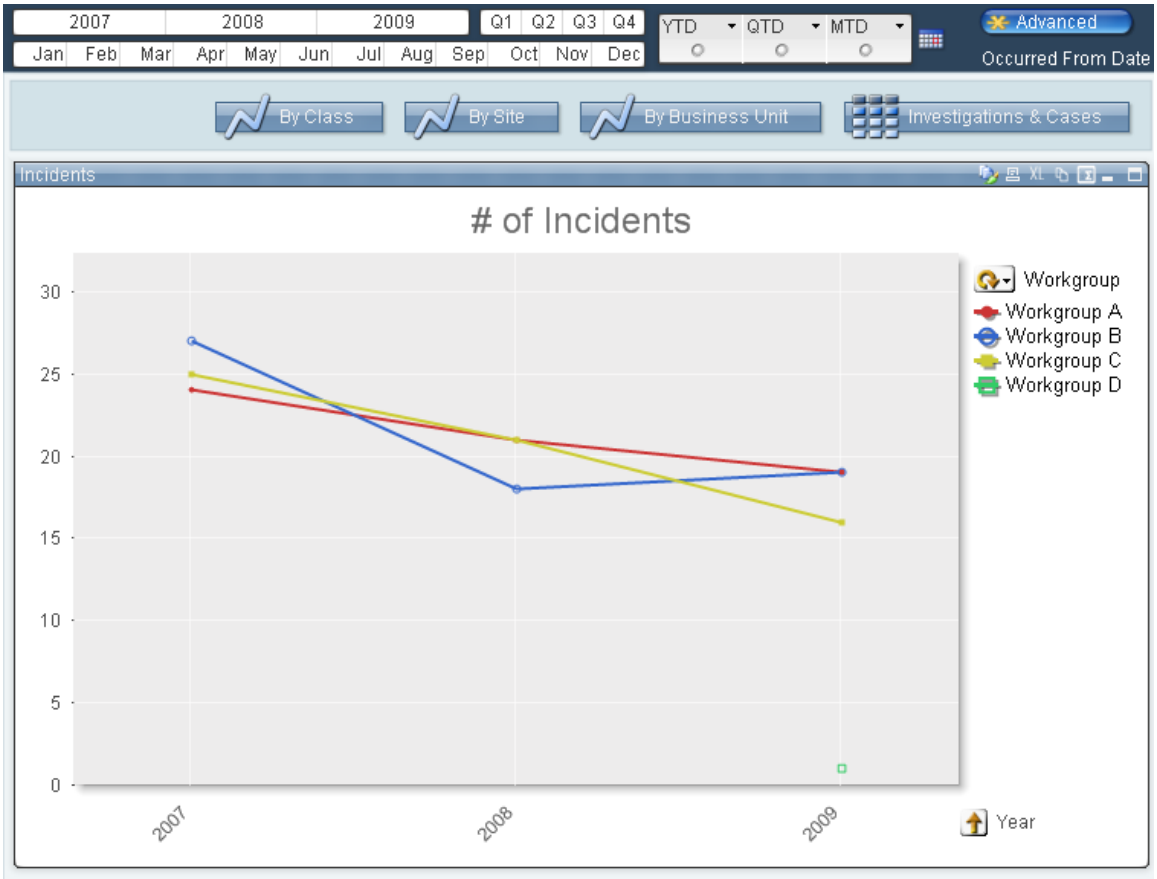


8. Your chart will now show the number of Criminal/Fire incidents that have occurred each year by site.



9. To see fires broken down by workgroup, select the Workgroup option from the cycle group.

10. To see the number of incidents that have occurred each year by workgroup, regardless of class, category or any other parameter, click Clear All.



11. Double-click the By Site chart button. (Note the Incidents button will re-appear, the By Site button will disappear and By Site will be listed in the blue title bar as the chart's title.)

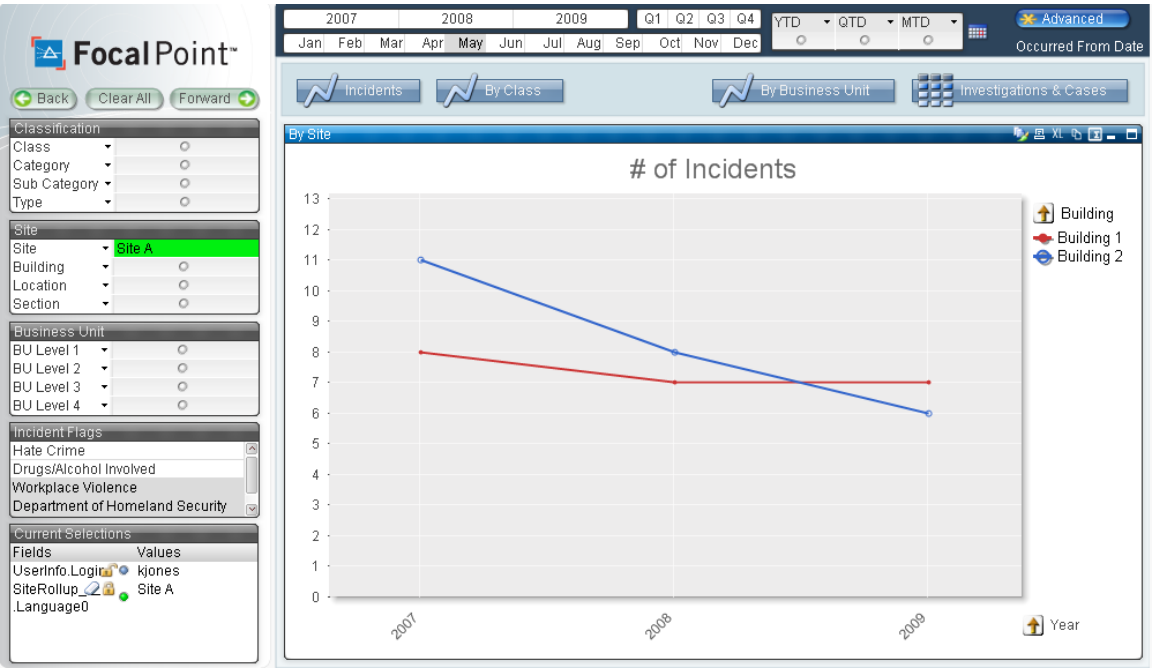
Question

How do you know which line on the chart represents Site A?

Answer

Hover your mouse over Site A in the legend and look for the line highlighted in bold.

12. Click on Site A in the legend or click on a data point on the line representing Site A to drill down to Site A's Buildings. (Note the drill down icon, indicating these fields are part of a drill down group. Any time you click on one of the values in the legend, the chart will drill down and display the next level in the hierarchy—in this case, Site A's Buildings.)



Question

How many incidents did Building 1 have in 2008?

Answer

Seven.

Question

How could you quickly determine what classes and categories of incidents have occurred at Site A?

Answer

Double-click the Incidents chart button; then, cycle to Class and Category. (Note that the Site A filter option will be selected on the left side of the screen.)

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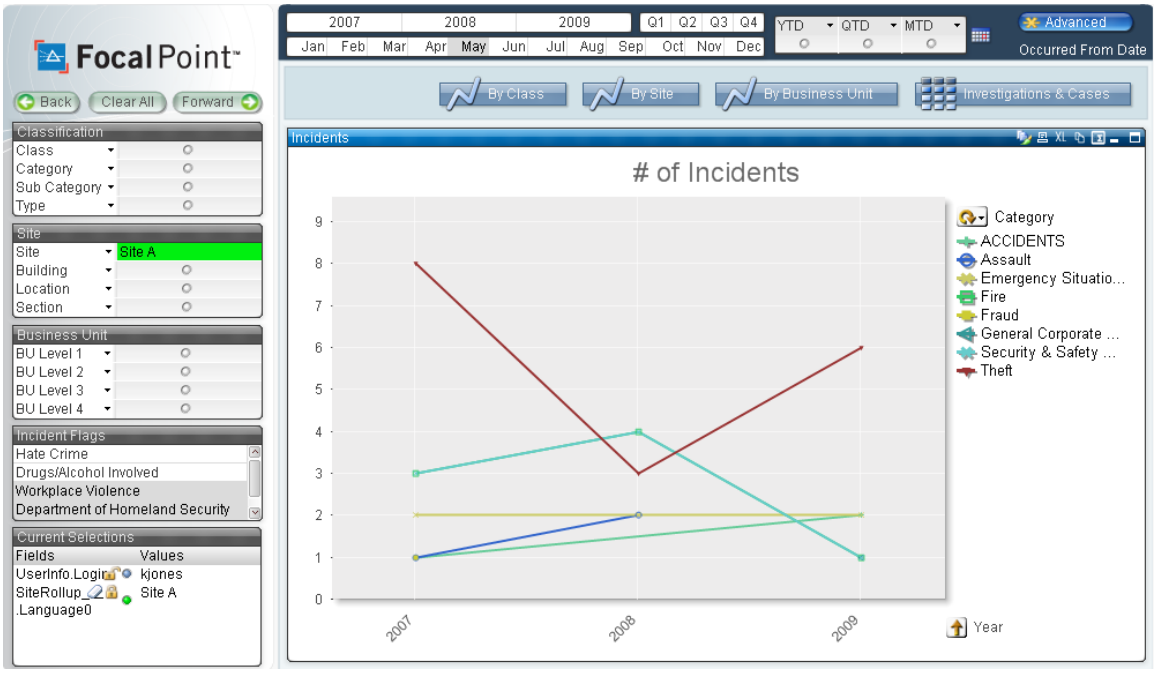
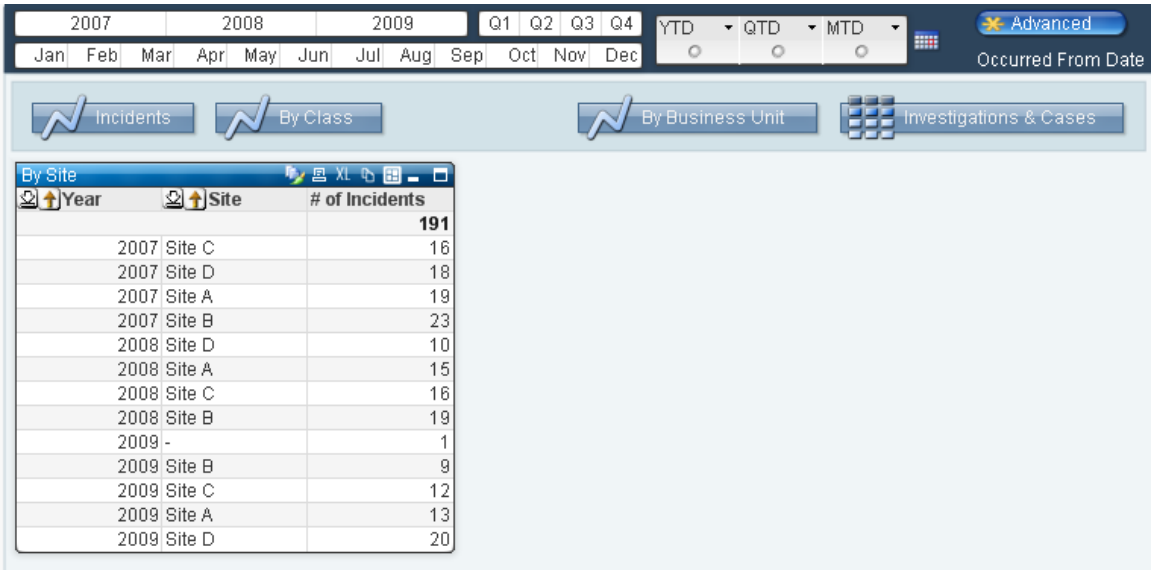


The Fast Change Button

1. Double-click the By Site button under the Trends tab.

2. Click Clear All.

3. Click the Fast Change button to quickly change your chart's style to the next available style in the Fast Change cycle. In this case, your chart will change from a line chart to a data table. (Note that the icon for the Fast Change button varies, depending on the next available chart style in the Fast Change cycle.)



Year	Site	# of Incidents
		191
2007	Site C	16
2007	Site D	18
2007	Site A	19
2007	Site B	23
2008	Site D	10
2008	Site A	15
2008	Site C	16
2008	Site B	19
2009	-	1
2009	Site B	9
2009	Site C	12
2009	Site A	13
2009	Site D	20

4. Note the other buttons located next to the Fast Change button. Using these buttons, you can copy your chart image to your Microsoft® Office clipboard; print your chart image; copy your chart's raw data to your Microsoft Office clipboard or, more specifically, to a Microsoft Excel® spreadsheet; and minimize or maximize your chart window.

5. Click the down arrow next to the Year drill down group, and select 2008 from the list. The chart will now drill down to Q1, Q2, Q3 and Q4 in 2008, displaying data from all sites. (Note that 2008 is highlighted in green in the date area above the chart.)

By Site

Quarter	Site	# of Incidents
		60
Q1	Site A	3
Q1	Site D	3
Q1	Site B	6
Q1	Site C	6
Q2	Site D	1
Q2	Site C	3
Q2	Site B	4
Q2	Site A	7
Q3	Site D	3
Q3	Site A	4
Q3	Site B	6
Q3	Site C	6
Q4	Site A	1
Q4	Site C	1
Q4	Site B	3
Q4	Site D	3

6. Click the Fast Change button once again to quickly change your chart's style to the next available chart style in the Fast Change cycle. Your chart will now change from a data table to a block chart.

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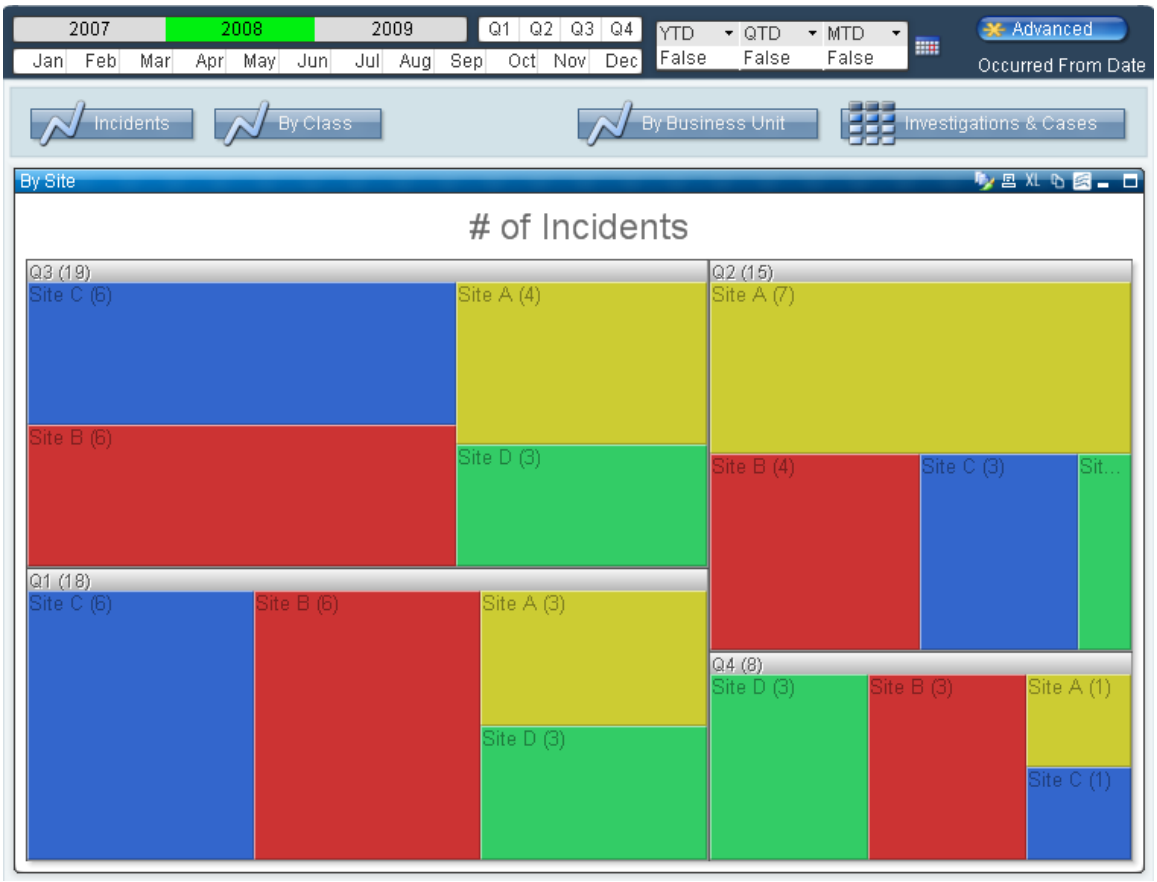
Q3 of 2008 has the largest number of incidents, so it has the largest amount of chart space allocated to it. Within Q3, six incidents occurred at Site C and another six at Site B, more incidents than at either of the other two sites; therefore, Site C and Site B within Q3 are represented by larger blocks than Q3's Site A and Site D.



7. Click the Fast Change button again. Your chart will now change from a block chart back to a line chart displaying the number of incidents for each quarter in 2008 by site. (Note that you can advance directly to a particular chart style by right-clicking the Fast Change button and choosing the appropriate chart style from the options displayed.)

Question

How many incidents from 2009 were assigned to the North America business unit?

Answer

26. (Double-click the By Business Unit chart button, select North America from the BU Level 1 drill down group on the right side of the chart, select 2009 from the date area above the chart, click the Fast Change button to change your chart to a data table, and read the total number of incidents displayed at the top of the table in bold.)

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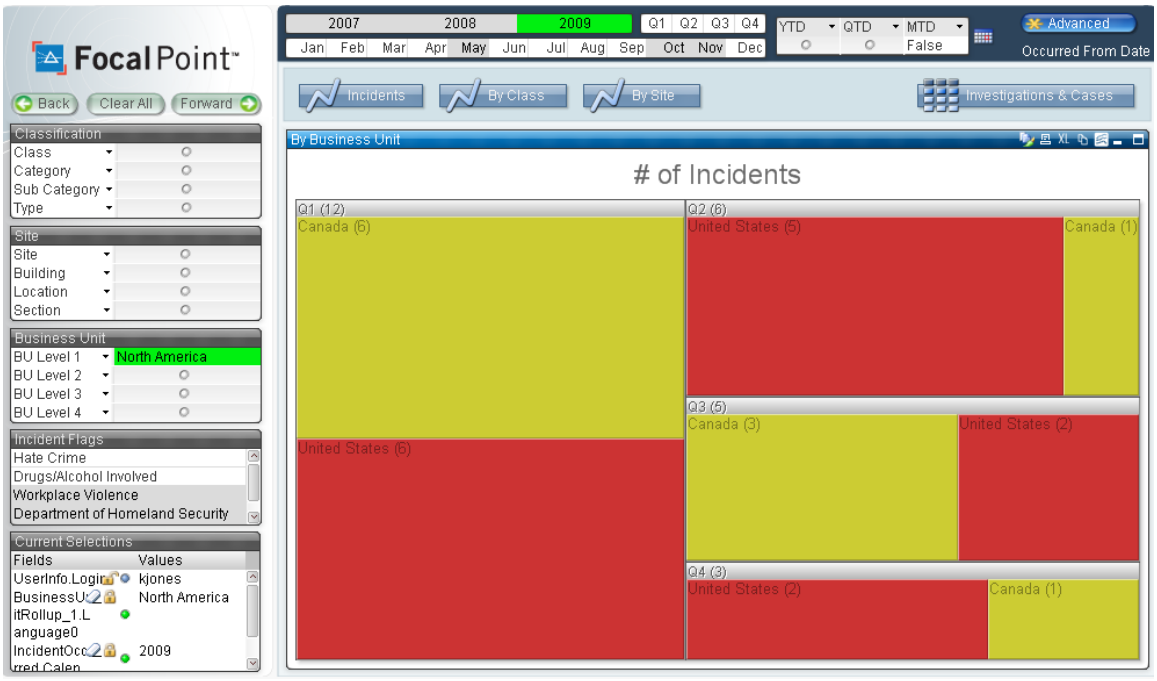
Question

Which quarter in 2009 had the highest number of incidents and which business unit (Level 2) was affected the most?

Answer

Q1 had the highest number of incidents in 2009. Both Canada and the United States were affected equally, with each having 6 incidents. (Click the Fast Change button to change your data table to a block chart. Q1 has the largest number of incidents, and both Canada and the United States have equal-sized blocks.)



8. Click the Fast Change button to change your block chart back to a line chart.

The Advanced Tab

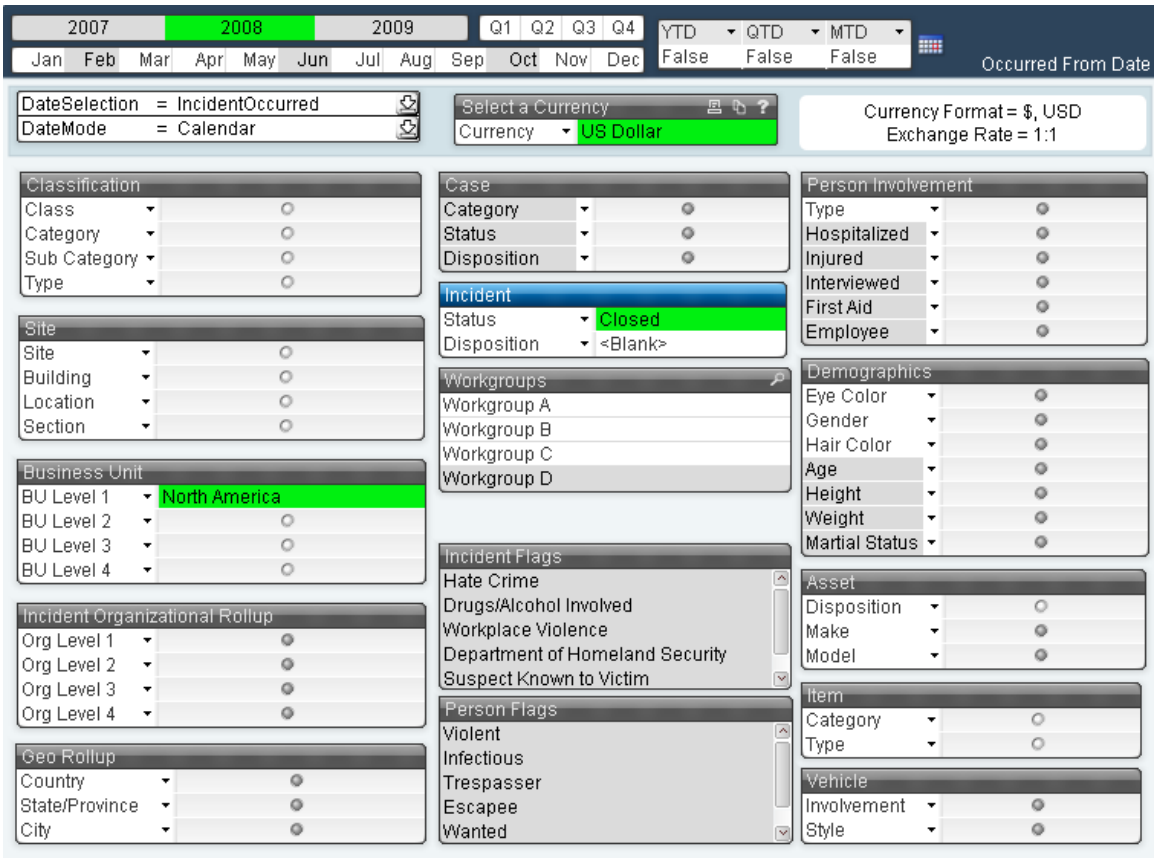
The Advanced tab allows you to apply additional data filters that are not available anywhere else in Focal Point.

1. Select the By Business Unit chart under the Trends tab.
2. Click Clear All.
3. Select 2008 from the date filter area above the chart.

4. Click on the North America option in the drill down group on the right side of the chart.

5. Select the Advanced tab.

6. In the Incident section, set the Status field to Closed.



Question

Of the incidents assigned to the North America business unit that took place in 2008, how many have an incident status of Closed?

Answer

Fourteen. (Return to the Trends tab, click the Fast Change button to change your chart to a data table, and read the total number of incidents at the top of the table in bold.)

Question

Determine how many incidents in total (for all years and all business units) had drugs or alcohol involved.

Answer

One. (Click Clear All to erase all your previous parameters, return to the Advanced tab, select Drugs/Alcohol Involved under Incident Flags, return to the Trends tab, and read the total number of incidents indicated in bold at the top of the data table.)

Question

In what year and quarter did that particular incident occur?

Answer

Q2 of 2009. (There are a couple different ways to arrive at this answer. You can find the date the incident occurred on the data table or by looking at the Incident Details tab; this will give you the year the incident occurred and you can determine the quarter by looking at the month. Or, you can simply note the year and quarter that are highlighted in white in the date filter area above the chart.)

Question

What is the Incident Number for the incident and what are the names of the Involved Persons?

Answer

INCD0000000187 and Jason Smith. (Go to the Incident Details tab, note the Incident Number, double-click the Involved Persons button, and expand the node under Involvement Type to display the involved person's name.)

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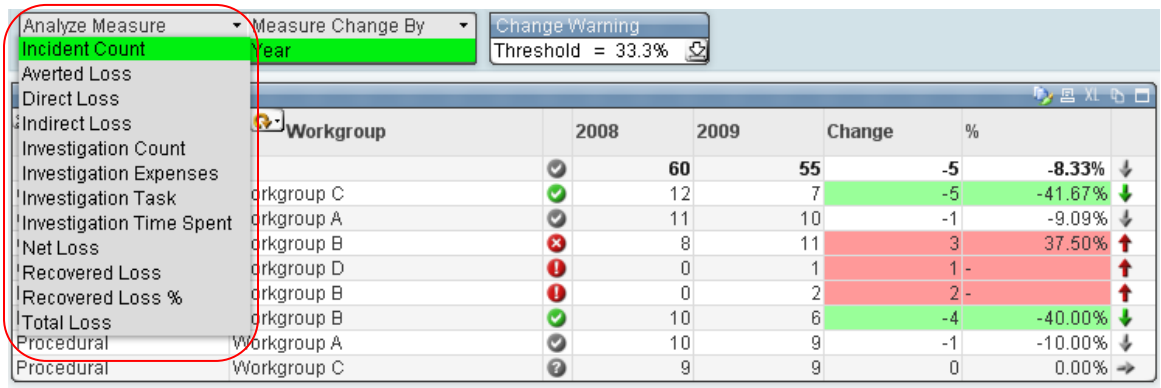
Score Card

With the Score Card, you can compare performance using standard performance management measures and indicators in relation to risk types, locations, etc.

In Focal Point, performance management involves four main components: measures, metrics, comparatives and indicators.

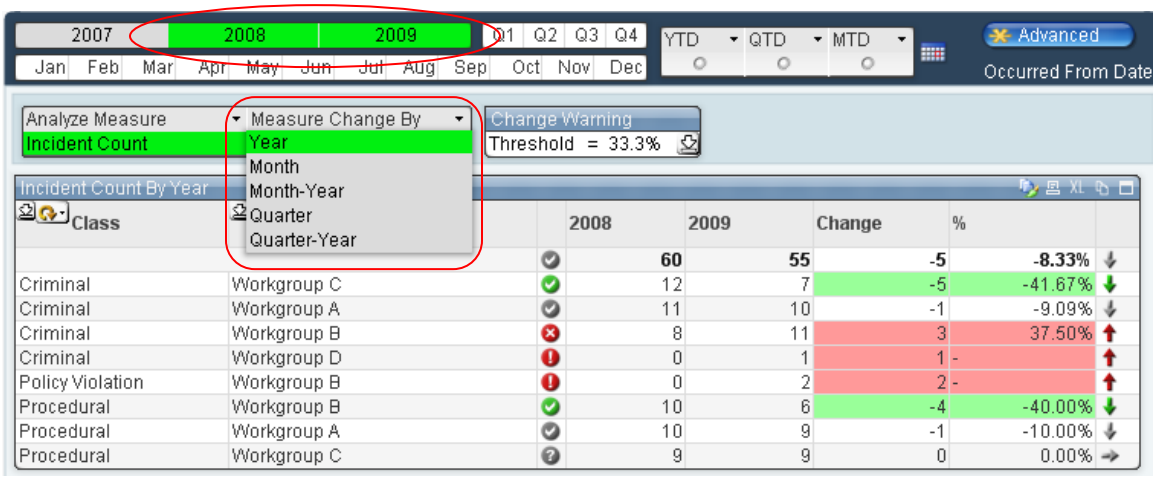
Measures: A measure is the particular element that is actually being measured. For example, you might want to measure your organization's internal thefts. You might even want to measure more than one element at once, such as internal thefts at Site A. Using the cycle groups on the Score Card, you can select from a variety of measures.

Metrics: A metric defines how a measure will be quantified. For instance, there are a number of ways that internal thefts could be quantified, such as by number of incidents or by total dollars lost. Again, the Score Card offers various metric options for selection.



Comparatives: For a measurement to be meaningful in a performance management context, it must be compared against some kind of target or benchmark, known as a comparative. Time periods are often used as comparatives. For example, you might be interested in comparing the number of internal thefts

that took place in 2009 with the number that took place in 2008. Using the Score Card's Measure Change By field and the date filter options, you can compare data over a number of different time periods.



Indicators: An indicator characterizes performance as positive or negative, or signifies a trend observed in the data under comparison. In Focal Point, two sets of icons are used as indicators.

Color-coded status icons indicate whether changes are good ( ) or bad ( ), or whether there has been no change at all ( ). (The exclamation mark [ ] indicates that one of the data sets being compared either went up from zero or down to zero.)

Further, color-coded trend icons indicate the direction of change as going up ( ), down ( ) or remaining constant ( ).

Positive changes in data are color-coded in green, while negative changes are color-coded in red. (Grey is used when there has been no change, or when the increase or decrease is within the acceptable range of variance set in the Change Warning Threshold field.)

In all cases, the use of green or red to indicate positive or negative change depends on the data being compared. For example, when comparing recovered losses, increases are positive and colored green; however, in the case of thefts, increases are negative and colored red.

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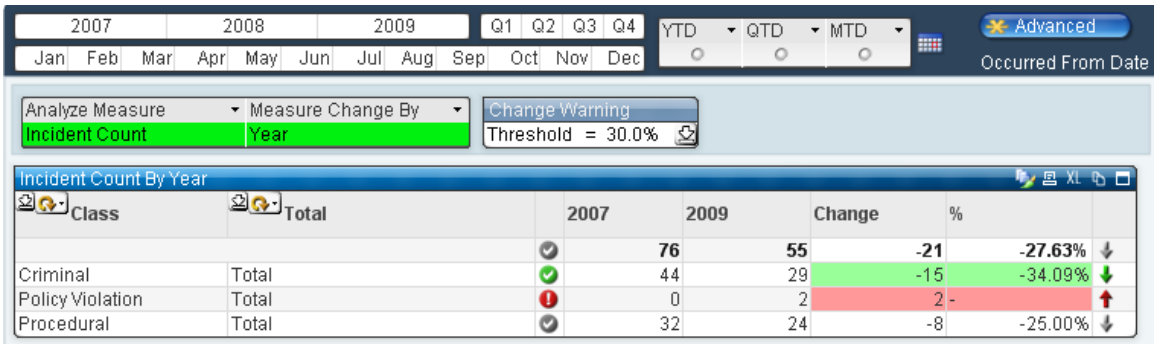
Let's practice…

1. Select the Score Card tab.
2. Click Clear All.
3. Select Incident Count from the Analyze Measure lookup list.
4. Select Year from the Measure Change By lookup list.
5. Set the Change Warning Threshold to 30.0%.
6. Set the first cycle group on the left to Class.
7. Set the second cycle group to Total.



8. Note that your chart is comparing incident counts from the year 2007 with the year 2009. Since you chose Year for the Measure Change By field but did not specify any particular dates, Focal Point will automatically compare data from the first year (or earliest year) in the database (i.e., 2007) with the last year in the database (i.e., 2009). If you chose Month, rather than Year, for the Measure Change By field, Focal Point would automatically compare data from the first month of every year, January, with the last month of every year, December.

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9. Review the status icons (in the third column) to see which incident classes have improved between the two time periods, and which have not. Note there are three checkmarks (indicating improvement): one for the overall number of incidents across all classes, one for Criminal incidents and one for Procedural incidents. The status icon for the Policy Violation line item is an exclamation mark, indicating that one of the time periods (2007) had zero incidents.

10. Examine the data in the 2007 and 2009 columns, and note that the trend icons (in the final column) correspond to increases and decreases between the two time periods.

11. Look at the figures in the % column. Note that any line with a % figure higher than 30.0% (plus or minus) is colored green or red (depending on whether the change is considered positive or negative), while any line with a % figure lower than 30.0% (plus or minus) is left uncolored. This color-coding is driven exclusively by the percentage specified in the Change Warning Threshold field (30.0%, in this case).

    For example, the line for Criminal incidents is colored green because the change percentage between the two time periods is -34.09%; meaning there were 34.09% fewer incidents in 2009 than in 2007 (a positive change that is above the Change Warning Threshold of 30.0%). Meanwhile, the line for Procedural incidents is neither green nor red because the change percentage between the two time periods (-25.00%) is below the Change Warning Threshold of 30.0%.

12. Lower the Change Warning Threshold to 20.0%.

13. Note that the status and trend icons for the Procedural line have not changed, but the line items are now colored green. This is because the change percentage between the two time periods (-25.00%) is now above the new Change Warning Threshold of 20.0%. And, of course, the line is green, rather than red, because the change is viewed positively (decreasing incident counts are good).

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Question

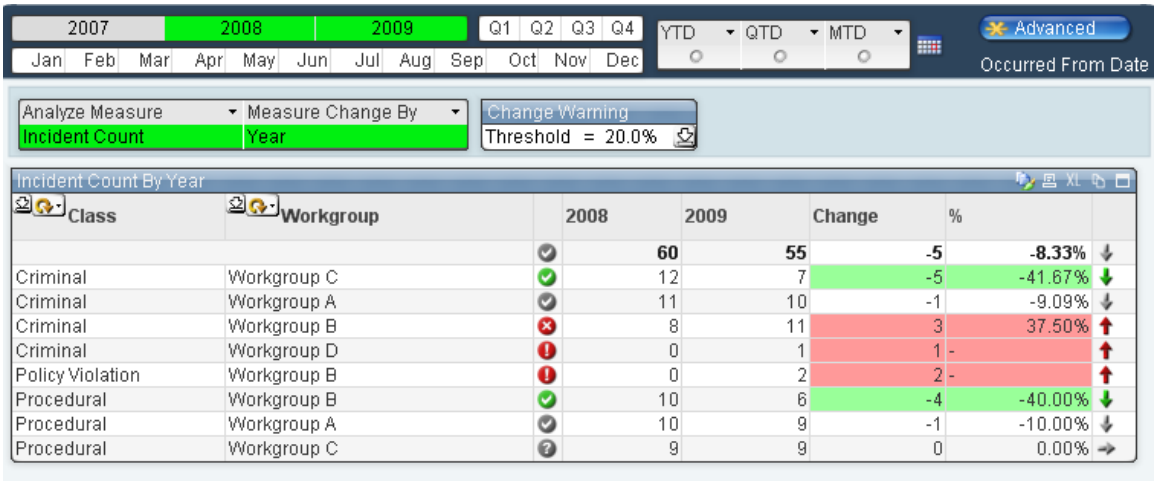
Why is the Policy Violation line red when there is no change percentage indicated?

Answer

The number of Policy Violation incidents increased from zero in 2007 to two in 2009. While it is impossible to calculate a change percentage from zero to another value, the change is most certainly a negative one (increasing incident counts are bad); so, the line is colored red. Note that increases from zero values, or decreases to zero values, are always colored in green or red (depending on whether the change is viewed positively or negatively); they are never left uncolored.

14. Change the second cycle group to Workgroup.

15. Select 2008 and 2009 from the date filter area above the chart. Rather than comparing the year 2007 with the year 2009, your chart will now be comparing the year 2008 with the year 2009.



Class	Workgroup		2008	2009	Change	%	
		✓	60	55	-5	-8.33%	↓
Criminal	Workgroup C	✓	12	7	-5	-41.67%	↓
Criminal	Workgroup A	✓	11	10	-1	-9.09%	↓
Criminal	Workgroup B	✗	8	11	3	37.50%	↑
Criminal	Workgroup D	!	0	1	1	-	↑
Policy Violation	Workgroup B	!	0	2	2	-	↑
Procedural	Workgroup B	✓	10	6	-4	-40.00%	↓
Procedural	Workgroup A	✓	10	9	-1	-10.00%	↓
Procedural	Workgroup C	?	9	9	0	0.00%	→

16. Review the status icons (in the third column) to see which line items have improved between 2008 and 2009, and which have not. Note there is one X on this score card (indicating poor performance); it is on the Criminal/Workgroup B line, where incidents have increased between the two time periods. There is also one question mark on this score card (indicating no change between the two time periods); it is on the Procedural/Workgroup C line.

17. Select Q1 from the date filter area above the chart. Your chart will now be comparing data from Q1 of 2008 with Q1 of 2009.

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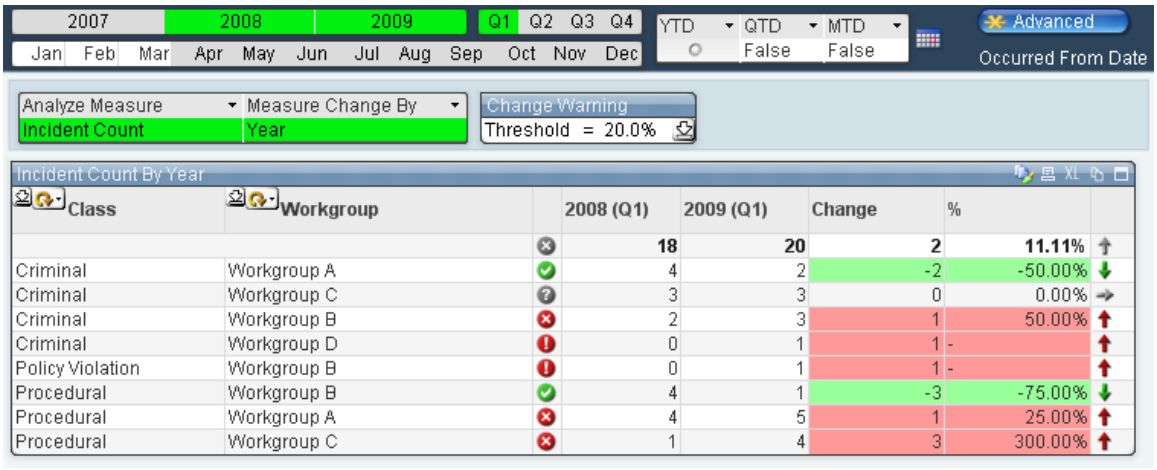
Question

Overall, what is the total change (and change %) in incident count between Q1 of 2008 and Q1 of 2009? Is this good or bad?

Answer

There were two more incidents in Q1 of 2009 than in Q1 of 2008, with a change percentage of 11.11%. Although this is below the Change Warning Threshold (thereby not flagged as red), an increase in incidents is still bad.



Class	Workgroup		2008 (Q1)	2009 (Q1)	Change	%	
			18	20	2	11.11%	
Criminal	Workgroup A		4	2	-2	-50.00%	
Criminal	Workgroup C		3	3	0	0.00%	
Criminal	Workgroup B		2	3	1	50.00%	
Criminal	Workgroup D		0	1	1	-	
Policy Violation	Workgroup B		0	1	1	-	
Procedural	Workgroup B		4	1	-3	-75.00%	
Procedural	Workgroup A		4	5	1	25.00%	
Procedural	Workgroup C		1	4	3	300.00%	

18. Select Site B from the filter area on the left.

Question

Overall, what is the total change (and change %) in incident count at Site B between Q1 of 2008 and Q1 of 2009? Is this good or bad?

Answer

There were two fewer incidents at Site B in Q1 of 2009 than in Q1 of 2008, with a change percentage of -33.33%. This change is above the Change Warning Threshold, and it is flagged in green as a result. This is a good change.

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Focal Point
Back
Clear All
Forward
Classification
Class
Category
Sub Category
Type
Site
Site
Site B
Building
Location
Section
2007
2008
2009
Q1 Q2 Q3 Q4
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
YTD QTD MTD
False False
Advanced
Occurred From Date
Analyze Measure
Incident Count
Measure Change By
Year
Change Warning
Threshold = 20.0%
Incident Count By Year
Class
Workgroup
2008 (Q1)
2009 (Q1)
Change
%
6 4 -2 -33.33%
Criminal Workgroup A 1 0 -1 -100.00%
Criminal Workgroup C 1 1 0 0.00%
Policy Violation Workgroup B 0 1 1 -
Procedural Workgroup A 2 1 -1 -50.00%
Procedural Workgroup B 2 1 -1 -50.00%

Losses

The charts available under the Losses tab allow you to view loss values and statistics, including data for risk reporting. Loss values, loss statuses (e.g., Stolen, Lost, Damaged or Compromised) and loss types (e.g., Direct, Indirect or Averted) are all tracked within Perspective in the Involved Items and Involved Vehicles sections of Incident records.

There are four chart types available in this section: Loss Summary, Loss by Rollup, Loss Detail Breakdown and Loss Quadrant.

Let's practice…

1. Double-click the Loss Summary button under the Losses tab.
2. Click Clear All.
3. Set the y-axis cycle group in the top left corner of the chart to Total Loss.
4. Click on Stolen in the legend. Your chart will now display the total loss value per year for all stolen items and vehicles.

Question
What year had the highest total loss for stolen items and vehicles?

Answer
2008.

Question
What was the value of this loss?

Answer
$88,091.84. (Hover your mouse over the 2008 column and read the Total Loss value.

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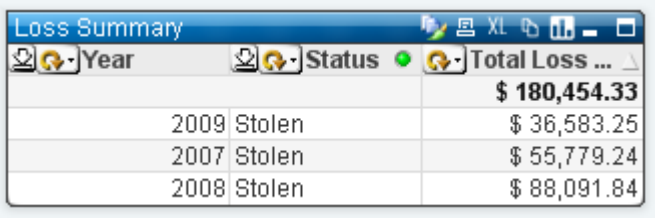
Question

What is the total loss for stolen items and vehicles for 2007, 2008 and 2009?

Answer

$180,454.33. (Use the Fast Change button to change your column chart to a data table. Read the Total Loss value in bold at the top of the table.)



Loss Summary

Year	Status	Total Loss ...
		$ 180,454.33
2009	Stolen	$ 36,583.25
2007	Stolen	$ 55,779.24
2008	Stolen	$ 88,091.84

5. Use the Fast Change button to change the data table back to a column chart.

6. Click the Back button to re-display all loss statuses on the chart, rather than just items and vehicles that were stolen.

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Question

What is the Total Loss for Criminal incidents for 2009?

Answer

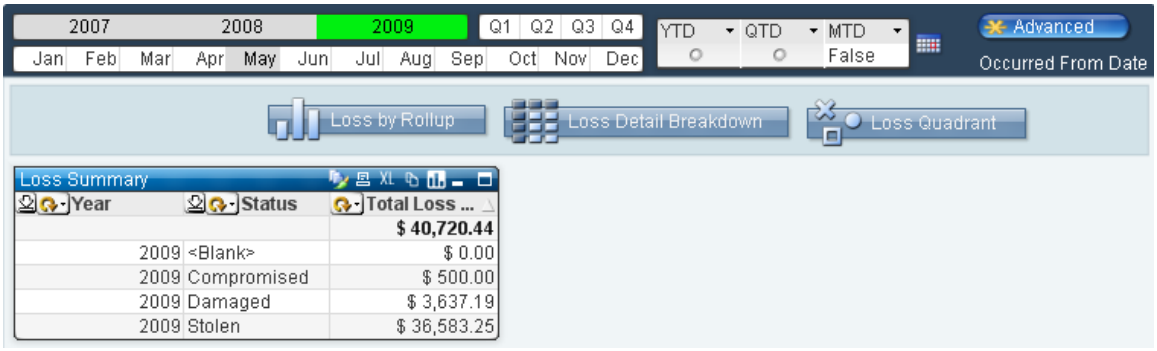
$40,720.44. (Select Criminal from the Class lookup list in the filter area on the left side of the chart, select 2009 from the date filter area above the chart, click the Fast Change button to change the chart to a data table, and read the Total Loss value in bold at the top of the table.)

Question

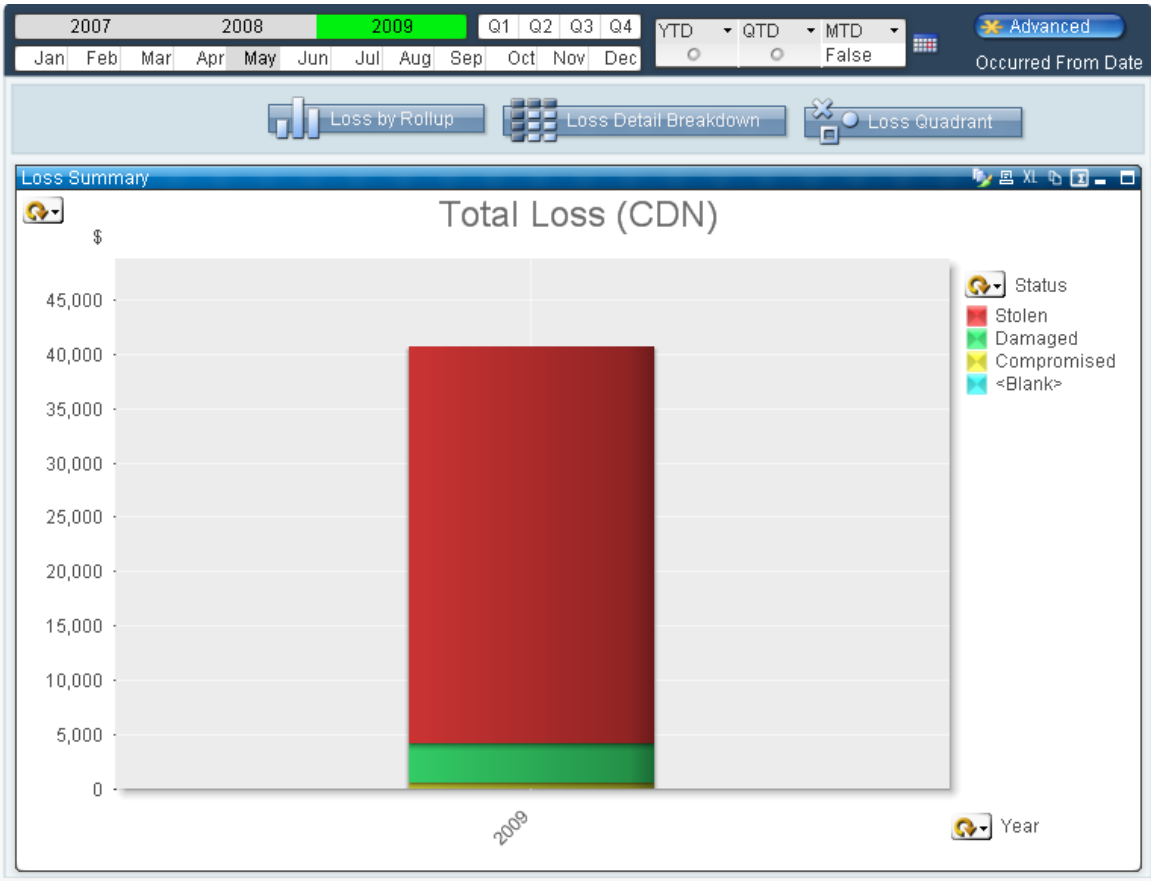
Of the Total Loss value for Criminal incidents for 2009, how much was assigned a Loss Status of Stolen?

Answer

$36,583.25. (Read the Total Loss value for the Stolen line item in the data table.)



7. Click the Fast Change button to change your data table back to a column chart.



Loss by Rollup Charts

In this particular chart section, we will examine loss values by rollup (i.e., class rollup, site rollup and business unit rollup).

Let's practice…

1. Double-click the Loss by Rollup button under the Losses tab.

2. Click Clear All.

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3. Set the cycle group on the top right side of the chart to Site.

Question

Which site had the highest Criminal losses in 2009 and what was the loss amount?

Answer

Site A, $13,984.46. (Select Criminal from the Class lookup list in the filter area on the left side of the chart, hover your mouse over the largest section of the 2009 column, and read the Site and Total Loss values.)

Question

Which workgroup had the highest losses in 2009?

Answer

Workgroup B. (Click the Back button to remove the Criminal filter, set the cycle group on the top right side of the chart to Workgroup, hover your mouse over the largest section of the 2009 column, and read the Workgroup value.)

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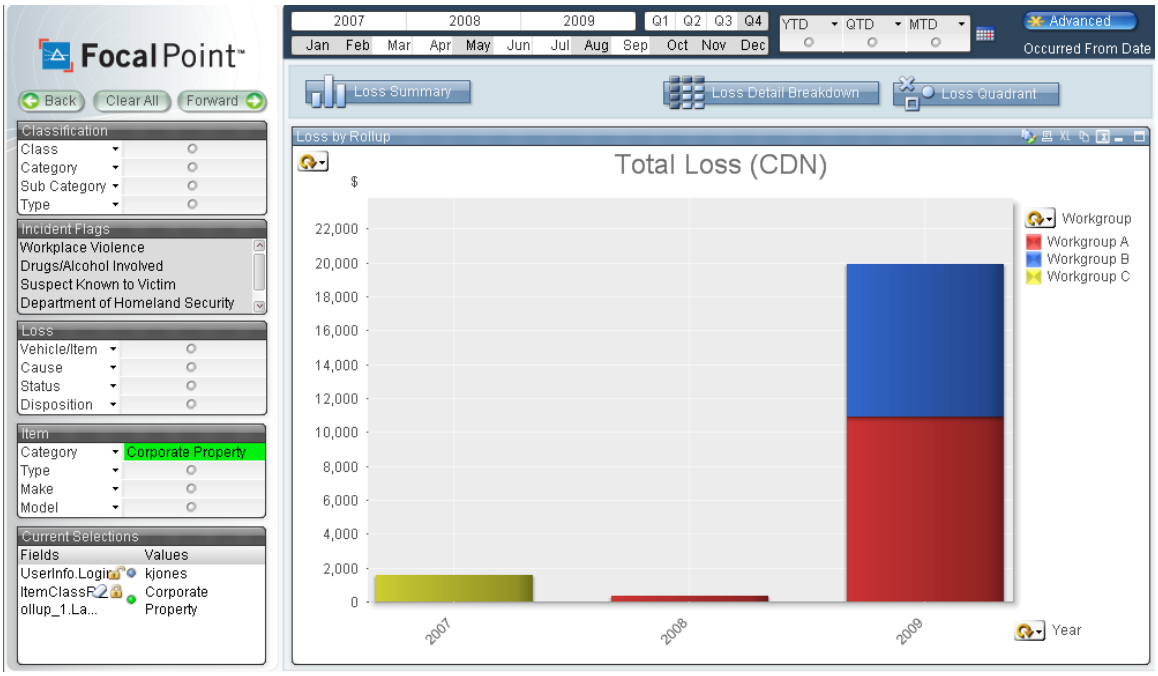
Question

In 2009, which workgroup had the highest total losses related to Corporate Property?

Answer

Workgroup A. (Under the Advanced tab, select Corporate Property from the Category lookup list in the Item section. Return to the Losses tab, hover your mouse over the largest section of the 2009 column, and read the Workgroup value. Note that an Item section has been added to the filter area to the left of the chart, with the Corporate Property filter indicated.)



Loss Detail Breakdown Charts

The Loss Detail Breakdown section allows you to view detailed loss information for any of the charts that you have created, anywhere in Focal Point. The section is similar to the Incident Details tab, in that you can jump to it at any time, from anywhere, to view in-depth information; however, the data provided is loss-specific.

Let's practice...

1. Double-click the Loss Detail Breakdown button under the Losses tab.
2. Click Clear All.
3. Set the cycle group in the top left corner of the data table to Site.

4. Expand the nodes for all sites to view additional data.

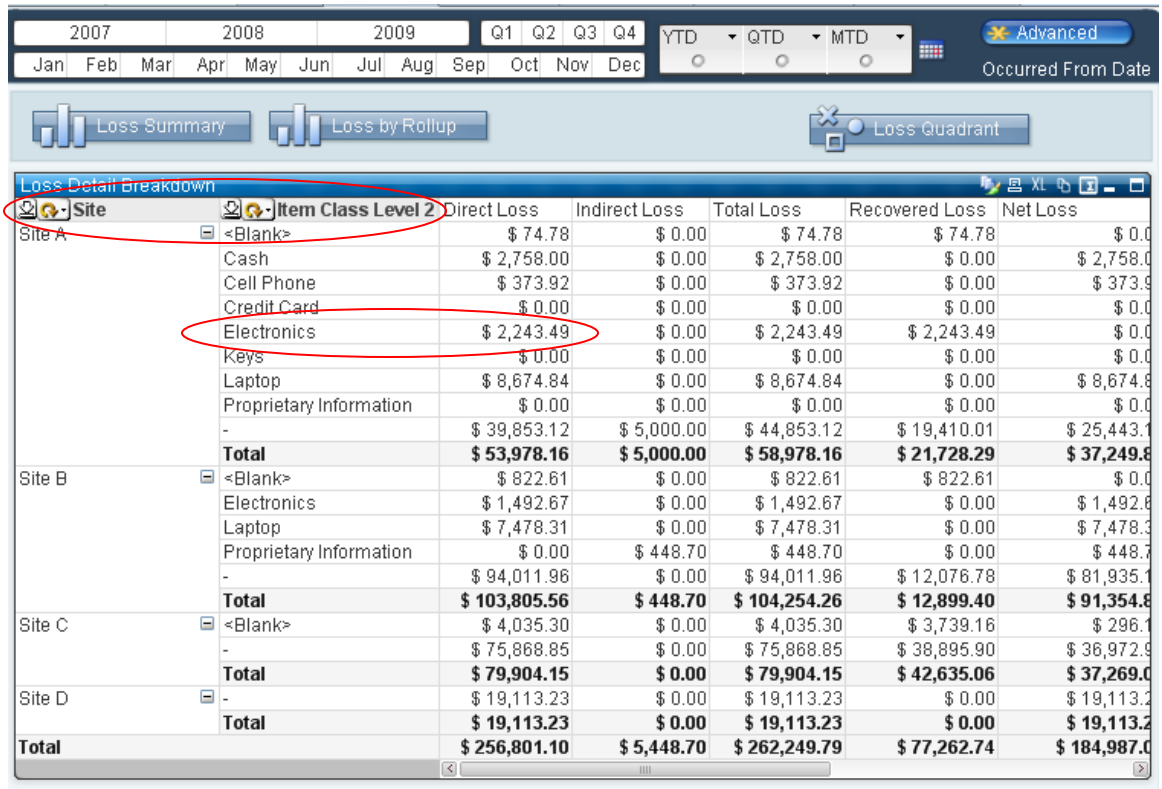
5. Set the cycle group in the second column to Item Class Level 2.

Question

Which Item Type (listed under the Item Class Level 2 column) had a Direct Loss of $2,243.49 at Site A?

Answer

Electronics.



Site	Item Class Level 2	Direct Loss	Indirect Loss	Total Loss	Recovered Loss	Net Loss
Site A	<Blank>	$ 74.78	$ 0.00	$ 74.78	$ 74.78	$ 0.0
	Cash	$ 2,758.00	$ 0.00	$ 2,758.00	$ 0.00	$ 2,758.0
	Cell Phone	$ 373.92	$ 0.00	$ 373.92	$ 0.00	$ 373.9
	Credit Card	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.0
	Electronics	$ 2,243.49	$ 0.00	$ 2,243.49	$ 2,243.49	$ 0.0
	Keys	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.0
	Laptop	$ 8,674.84	$ 0.00	$ 8,674.84	$ 0.00	$ 8,674.8
	Proprietary Information	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.0
	-	$ 39,853.12	$ 5,000.00	$ 44,853.12	$ 19,410.01	$ 25,443.1
	Total	**$ 53,978.16**	**$ 5,000.00**	**$ 58,978.16**	**$ 21,728.29**	**$ 37,249.8**
Site B	<Blank>	$ 822.61	$ 0.00	$ 822.61	$ 822.61	$ 0.0
	Electronics	$ 1,492.67	$ 0.00	$ 1,492.67	$ 0.00	$ 1,492.6
	Laptop	$ 7,478.31	$ 0.00	$ 7,478.31	$ 0.00	$ 7,478.3
	Proprietary Information	$ 0.00	$ 448.70	$ 448.70	$ 0.00	$ 448.7
	-	$ 94,011.96	$ 0.00	$ 94,011.96	$ 12,076.78	$ 81,935.1
	Total	**$ 103,805.56**	**$ 448.70**	**$ 104,254.26**	**$ 12,899.40**	**$ 91,354.8**
Site C	<Blank>	$ 4,035.30	$ 0.00	$ 4,035.30	$ 3,739.16	$ 296.1
	-	$ 75,868.85	$ 0.00	$ 75,868.85	$ 38,895.90	$ 36,972.9
	Total	**$ 79,904.15**	**$ 0.00**	**$ 79,904.15**	**$ 42,635.06**	**$ 37,269.0**
Site D	-	$ 19,113.23	$ 0.00	$ 19,113.23	$ 0.00	$ 19,113.2
	Total	**$ 19,113.23**	**$ 0.00**	**$ 19,113.23**	**$ 0.00**	**$ 19,113.2**
Total		**$ 256,801.10**	**$ 5,448.70**	**$ 262,249.79**	**$ 77,262.74**	**$ 184,987.0**

Question

What is the name of the particular item(s) identified in the previous question? Which incident(s) is this data tracked in?

Answer

PDA (Palm Treo 650), INCD0000000183. (Click on the Direct Loss value of $2,243.49 to filter your chart down to this line item, then click Incident Details tab to see which incidents this line item relates to. One incident is identified in white in the left column. Click on this incident (INCD0000000183) to display its details on the right, double-click on the Involved Items button and expand all nodes to read the complete entry.)

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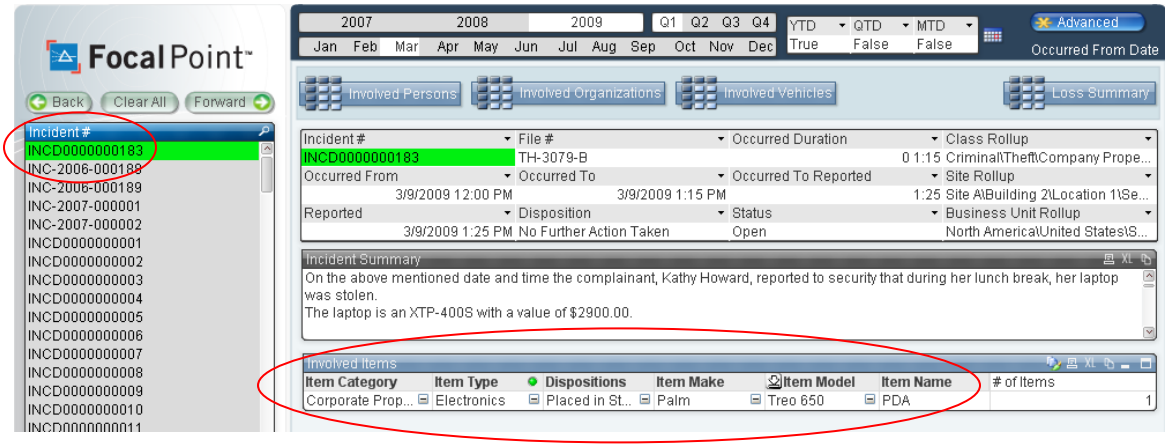

6. Return to the Losses tab. Note that a number of item details identified under the Incident Details tab are also displayed in the filter area on the left side of the screen.

7. Proceed to the next section. PLEASE DO NOT CLICK CLEAR ALL.

The Investigation Details Tab

Like the Incident Details tab, the Investigation Details tab allows you to view specific record details in-depth; however, the data displayed is exclusive to the Investigation section of Incident records. In addition to basic investigative information, the Investigation Details tab also contains Evidence Log, Investigation Log, Interview and Investigator data.

Let's practice…

1. Select the Investigation Details tab.

2. INCD0000000183 will appear in white in the column on the left side of the screen, and its investigative details will be displayed on the form on the right. (If you accidentally clicked the Clear All button after completing the last section, then you must find and select INCD0000000183 from the list of incidents in the left column. Alternatively, you can click the magnifying glass icon at the top of the column, type 183 in the text box that appears, and press Enter to select the INCD0000000183 option.)

Question

What is the investigation's disposition, and what are the names of the assigned investigators?

Answer

No Further Action Taken is listed in the Disposition field. The assigned investigators are Ian Davis, Derek Owens and Pamela White. (Double-click on the Investigators tab to view investigator details.)

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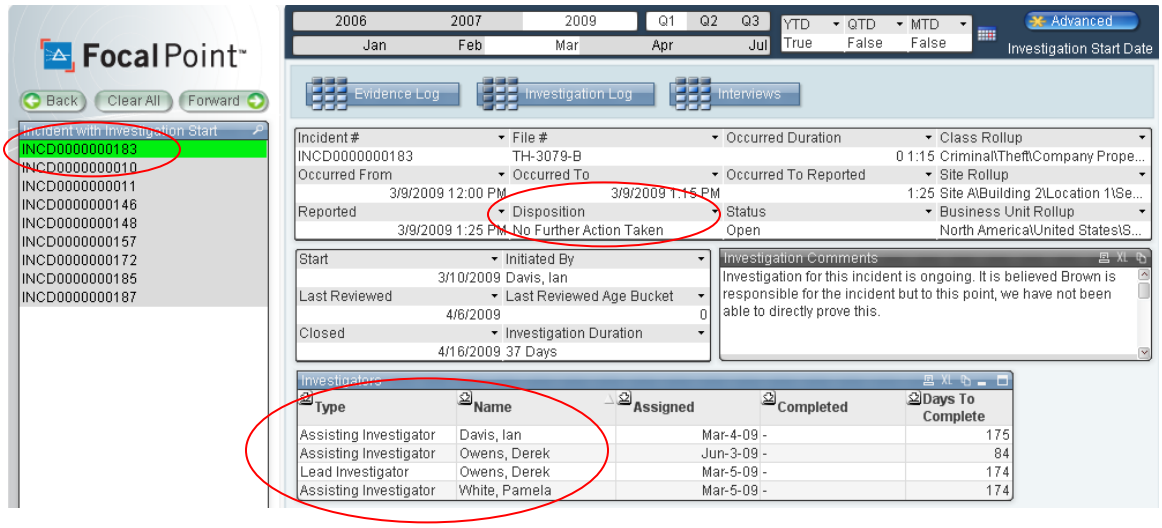
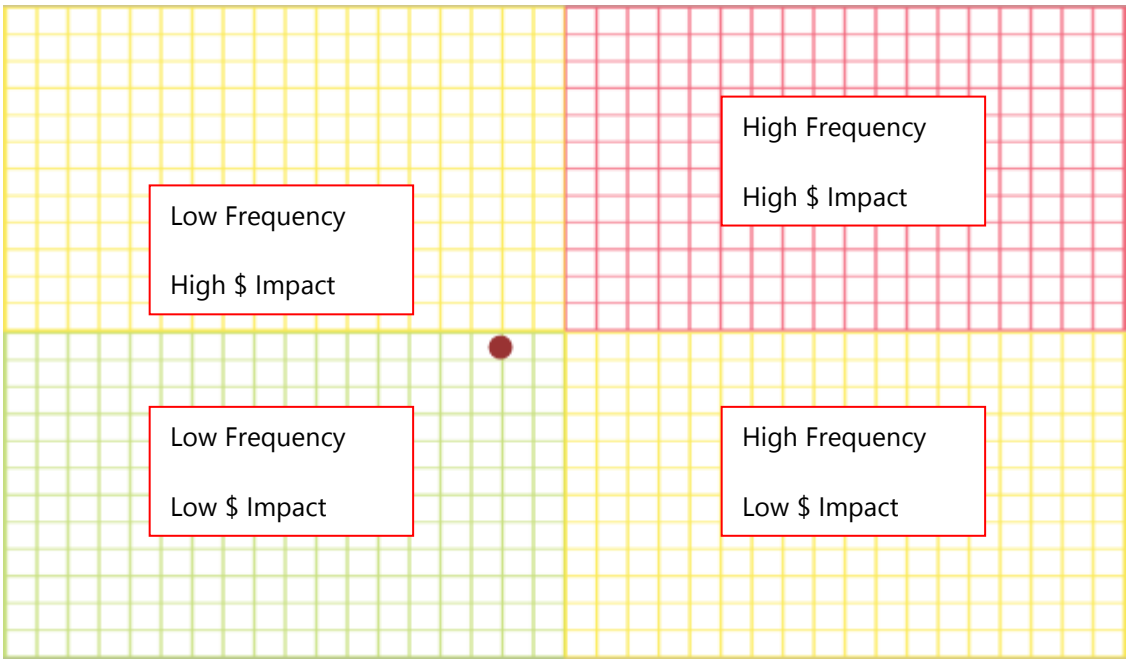


Loss Quadrant Charts

In the Loss Quadrant section, values are charted in one of four quadrants based on their impact and frequency. (Loss values are charted on the y-axis, and incident counts are charted on the x-axis.)



Let's practice…

1. Double-click the Loss Quadrant button under the Losses tab.

2. Click Clear All.

3. Set the cycle group on the right side of the chart to Site.

4. Hover your mouse over Site A in the legend and note the position of the Site A bubble. As compared to all other sites overall, Site A appears in a low frequency/low impact quadrant.

5. Click on Site A. Note that the Site A bubble has moved closer to the centre of the loss quadrant chart. This is because the scales for the x- and y-axis values have changed. Be aware of this as you work with Loss Quadrant charts. The scales on the axes do not remain constant; they change, relative to the data charted, each time a new chart is generated.

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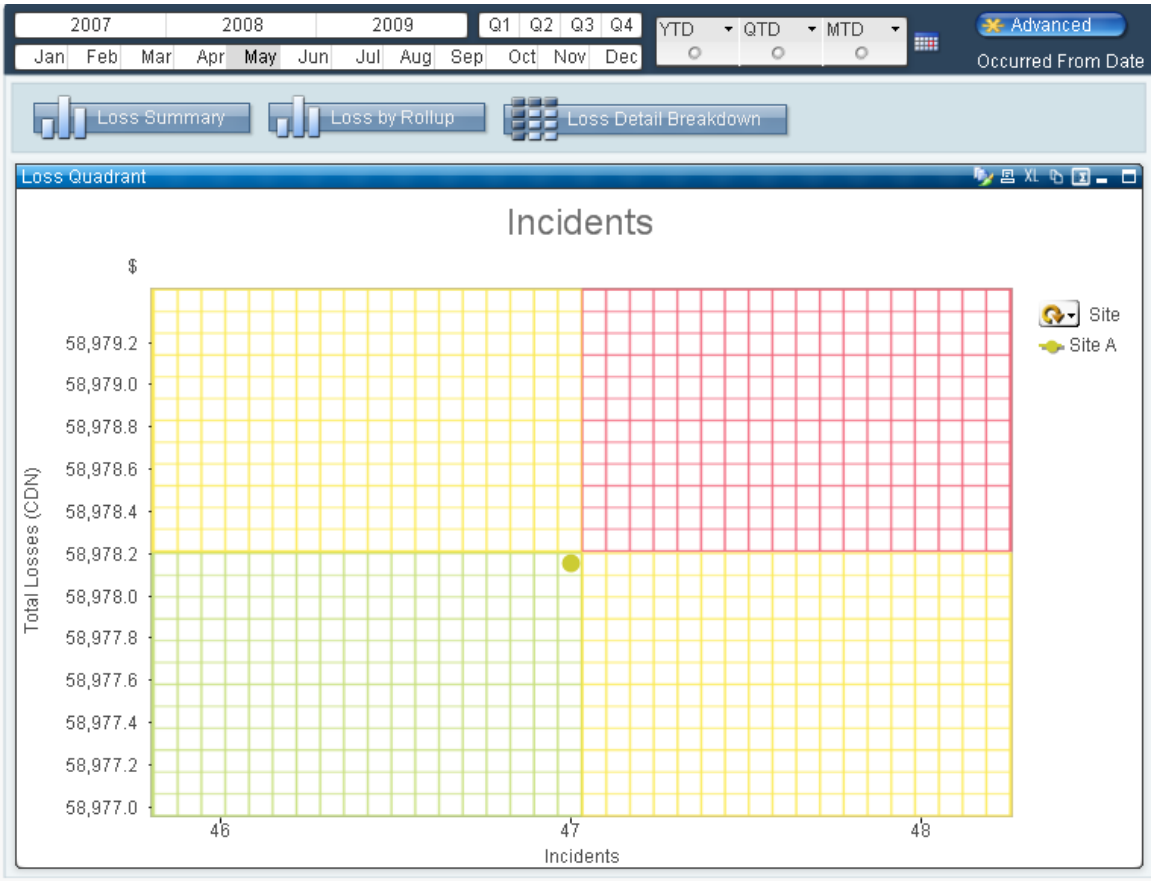


6. Click Clear All.

7. Set the cycle group on the right side of the chart to Class.

Question

Which class has the highest impact versus frequency rating?

Answer

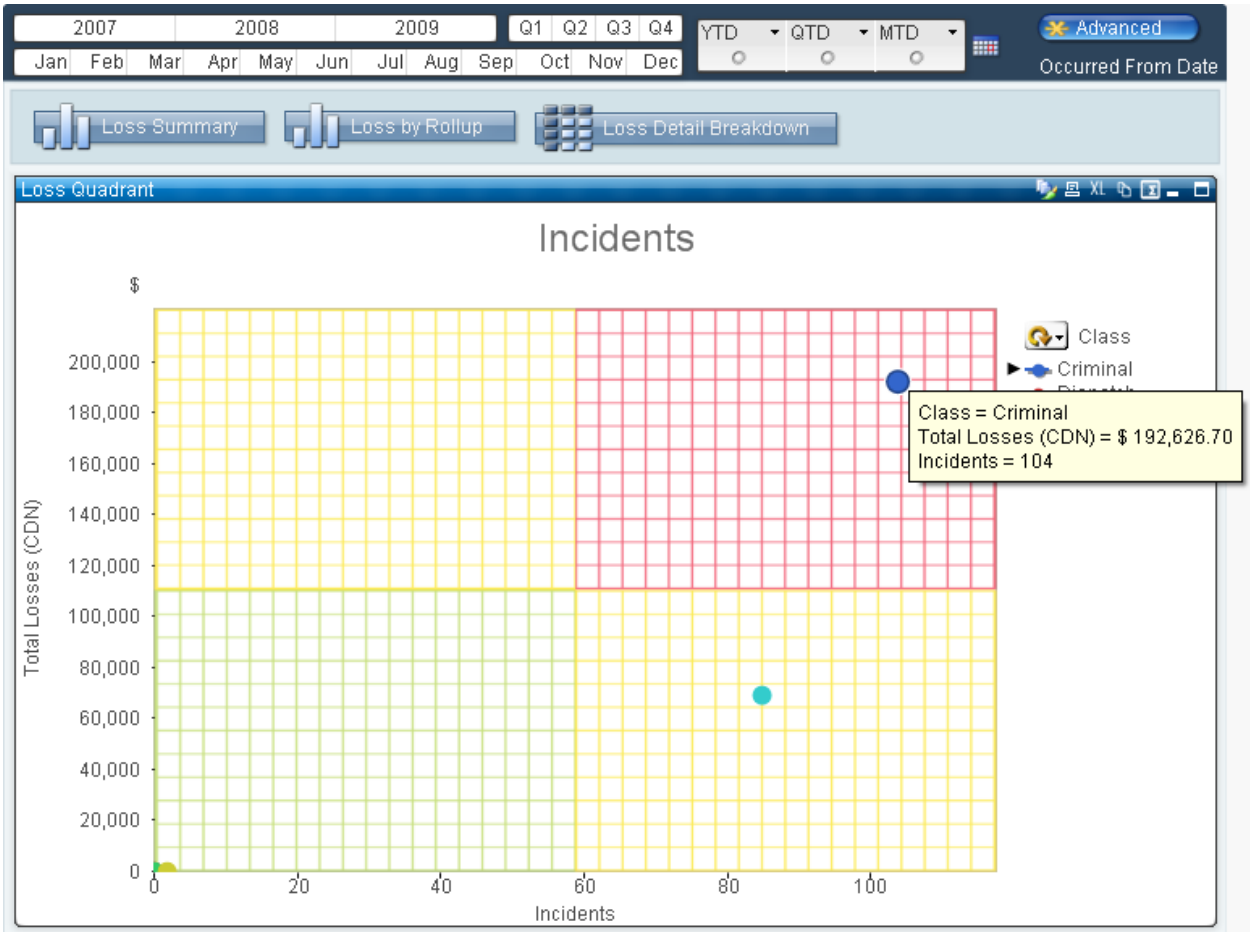
Criminal.

Question

What is the Total Loss value and the total number of incidents for this class?

Answer

$192,626.70, 104 incidents.



Question

Of the Criminal incidents, which category has the highest impact versus frequency rating?

Answer

Theft. (Click on the Criminal bubble to filter your chart by this particular class, set the cycle group on the right to category, hover over the bubble in the high frequency/high impact quadrant, and read the Category value.)

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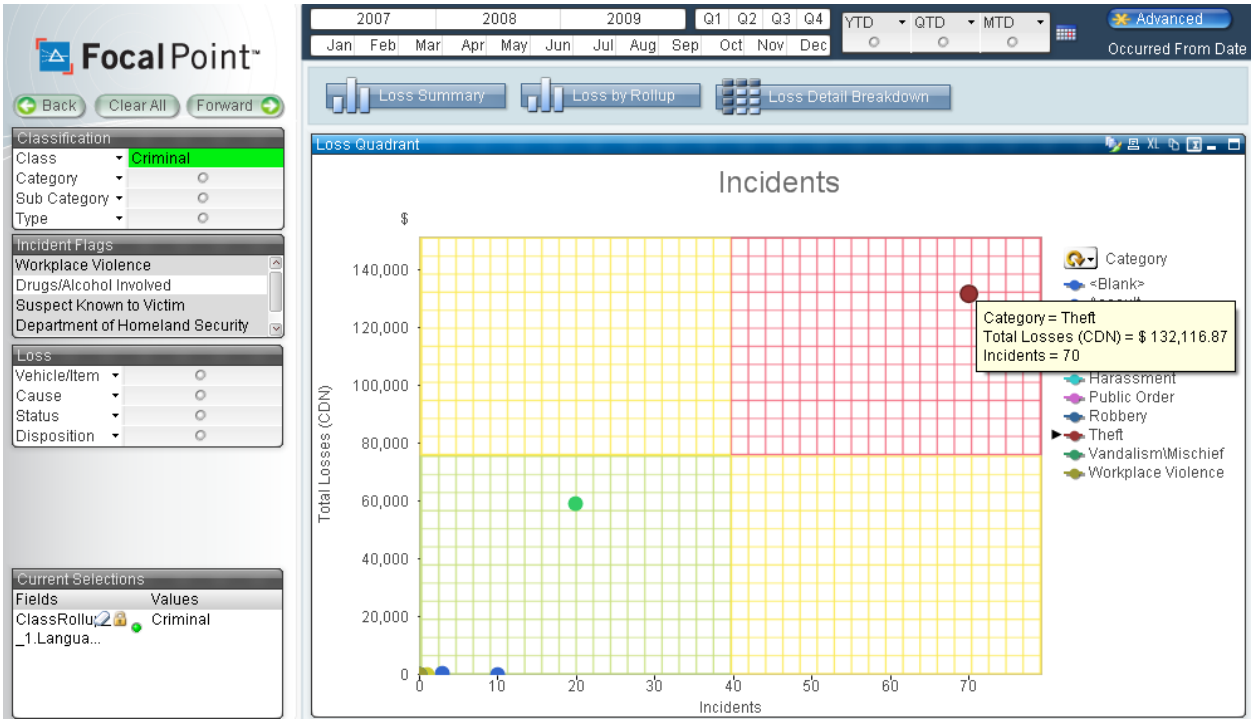

Question

Which category, overall, has the highest impact versus frequency rating?

Answer

Theft. (Click Clear All to erase all parameters or click the eraser icon beside Criminal in the Current Selections box on the left side of the screen. Hover over the bubble in the high frequency/high impact quadrant, and read the Category value.)

Question

Which North American business unit has the highest impact versus frequency rating?

Answer

United States. (Set the cycle group to BU Level 1 and select North America, or choose North America from the BU Level 1 lookup list under the Advanced tab, to filter your chart to North American incidents only. Set the cycle group to BU Level 2, hover your mouse over the dot in the high impact/high frequency quadrant, and read the BU Level 2 value.)

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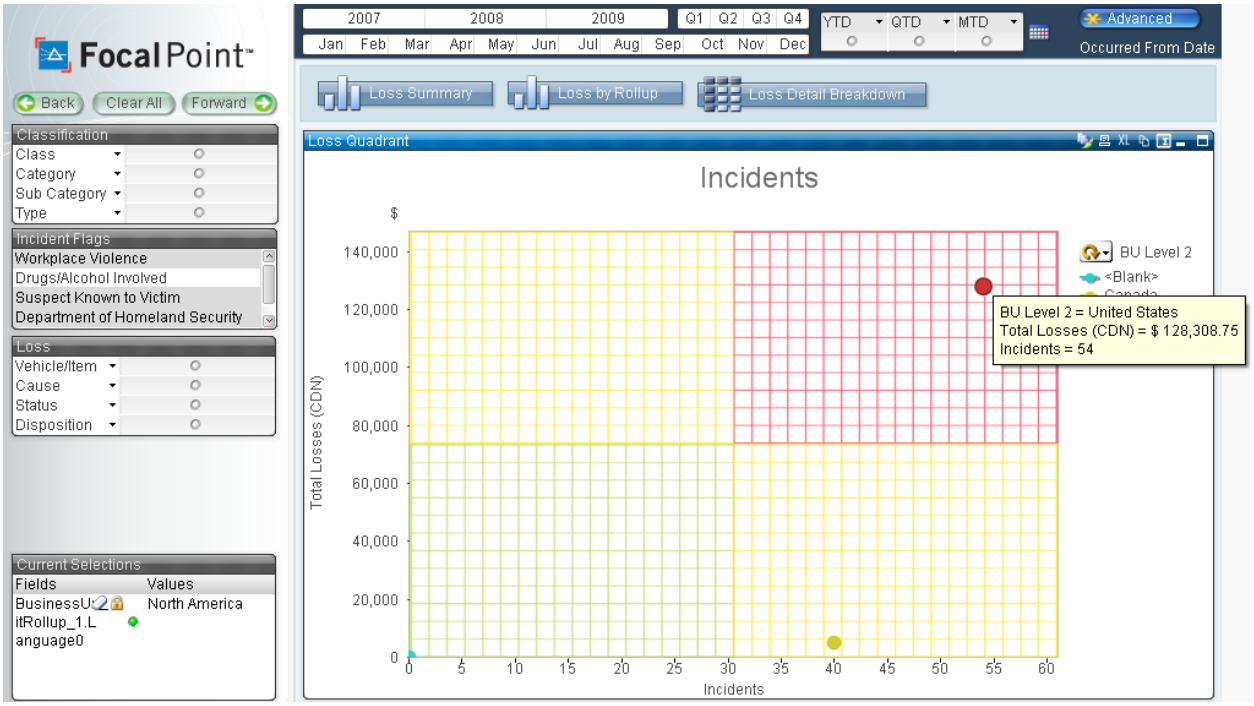

Question

Do any sites have a high impact/high frequency rating for 2009?

Answer

Yes, Site D. (Click Clear All, set the cycle group to Site, select 2009 from the date filter area above the chart, hover your mouse over the bubble in the red quadrant, and read the Site value.)

Question

Were most of Site D's losses in 2009 assigned a status of Lost, Stolen, Damaged or Compromised?

Answer

Damaged. (Click on the Site D bubble, double-click the Loss Summary button to change your chart type, hover your mouse over the largest section of the column, and read the Status value.)

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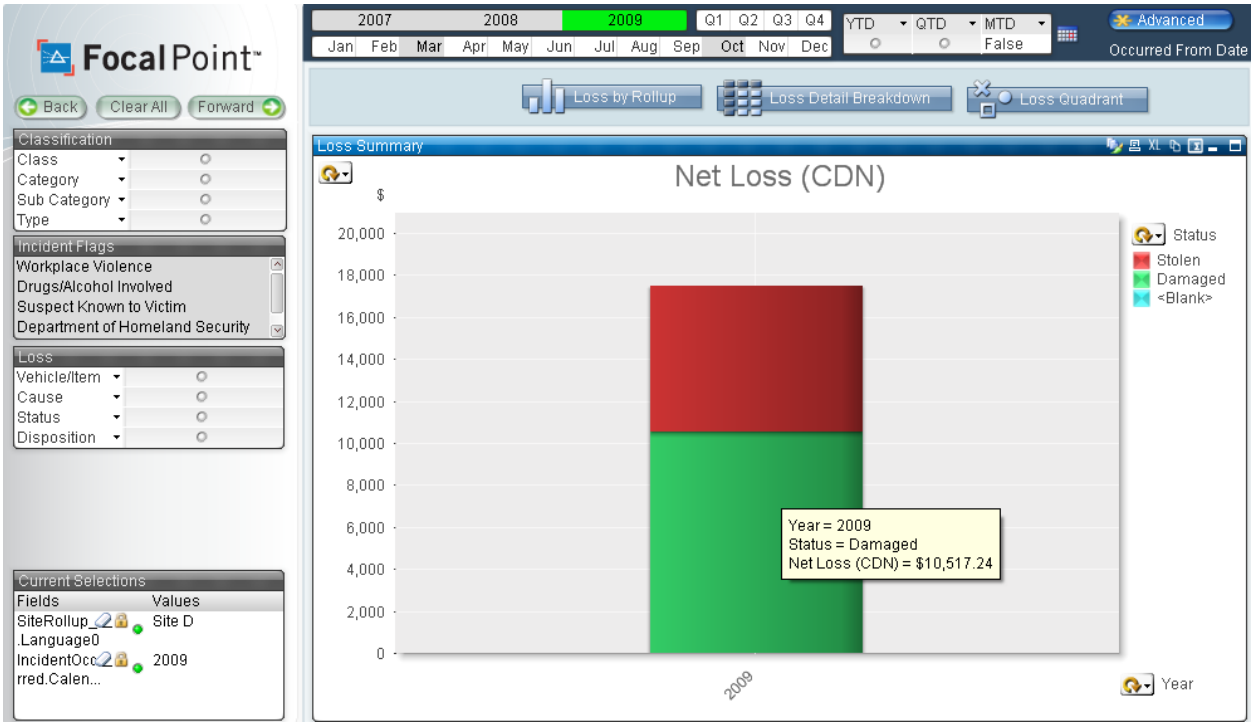
Focal Point
Back
Clear All
Forward
Classification
Class
Category
Sub Category
Type
Incident Flags
Workplace Violence
Drugs/Alcohol Involved
Suspect Known to Victim
Department of Homeland Security
Loss
Vehicle/Item
Cause
Status
Disposition
Current Selections
Fields
Values
SiteRollup_Language0
Site D
IncidentOccurred.Calen...
2009
2007
2008
2009
Q1
Q2
Q3
Q4
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
YTD
QTD
MTD
False
Advanced
Occurred From Date
Loss by Rollup
Loss Detail Breakdown
Loss Quadrant
Loss Summary
Net Loss (CDN)
$
20,000
18,000
16,000
14,000
12,000
10,000
8,000
6,000
4,000
2,000
0
Year = 2009
Status = Damaged
Net Loss (CDN) = $10,517.24
2009
Year
Status
Stolen
Damaged
<Blank>

Frequency

The Frequency charting section contains four different types of charts that allow you to compare incident activity in two or more time periods (Incident Date & Time Distribution, Incident Status Summary, Incident Summary and Incident Type). Generally, the x- and y-axes chart two different time period cycle groups, and a third cycle group can be set to chart some other data component (such as class, site, status or loss information).

Let's practice…

1. Double-click the Incident Date & Time Distribution button under the Frequency tab.
2. Click Clear All.
3. Note there are three cycle groups on this chart. The x- and y-axis cycle groups are both timeline related, and the third cycle group in the bottom left corner offers a number of options. Currently, Year is charted on the y-axis, Hour on the x-axis and the third cycle group is set to # of Incidents.

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Question

Which month(s) had the highest number of incidents in 2007, 2008 and 2009?

Answer

2007: February and September

2008: September

2009: February

(Set the x-axis cycle group to Month, and observe which months have the largest bubbles for each year. If you are uncertain exactly which bubbles are the largest, hover your mouse over the bubbles and compare their supporting data.)

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4. As you know, if you want to filter your chart data down to the years 2008 and 2009 only, you can select the 2008 and 2009 options from the date filter area above the chart. However, as an alternative, try highlighting all the bubbles for 2008 and 2009 on your chart.

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5. Your chart will automatically adjust to display the bubbles from the highlighted area only. Also, the 2008 and 2009 options in the date area above your chart (along with all the month buttons) will be highlighted in green, indicating that they have been actively selected as filters.

Question

Which quarter had the highest number of incidents in 2008 and in 2009?

Answer

2008: Q3

2009: Q1

(Set the x-axis cycle group to Quarter, and observe which quarters have the largest bubbles for each year.)

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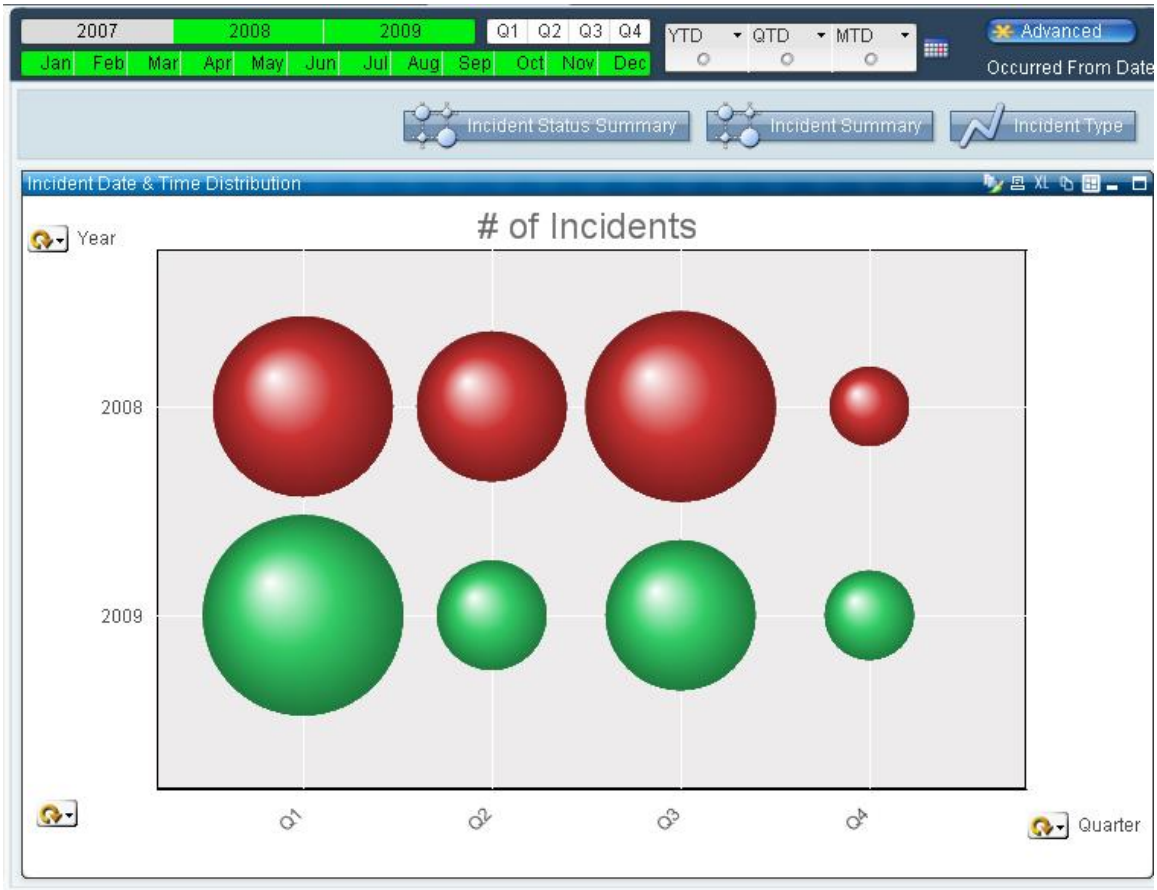

Question

In 2009, which month(s) had the highest number of incidents in each quarter?

Answer

Q1: February

Q2: April

Q3: July and September

Q4: December

(Highlight all the bubbles for 2009, set the y-axis cycle group to Quarter, set the x-axis cycle group to Month, and observe which months have the largest bubbles for each quarter.)

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Question

In 2007 and 2008 combined, which quarter and month had the highest total losses?

Answer

Q3, September. (Clear the 2009 filter, select 2007 and 2008, and set the cycle group in the bottom left corner of the chart to Total Loss. Your chart will now display the combined total losses for both 2007 and 2008, broken down by quarter and month. Observe which quarter and month have the largest bubble on the chart.)

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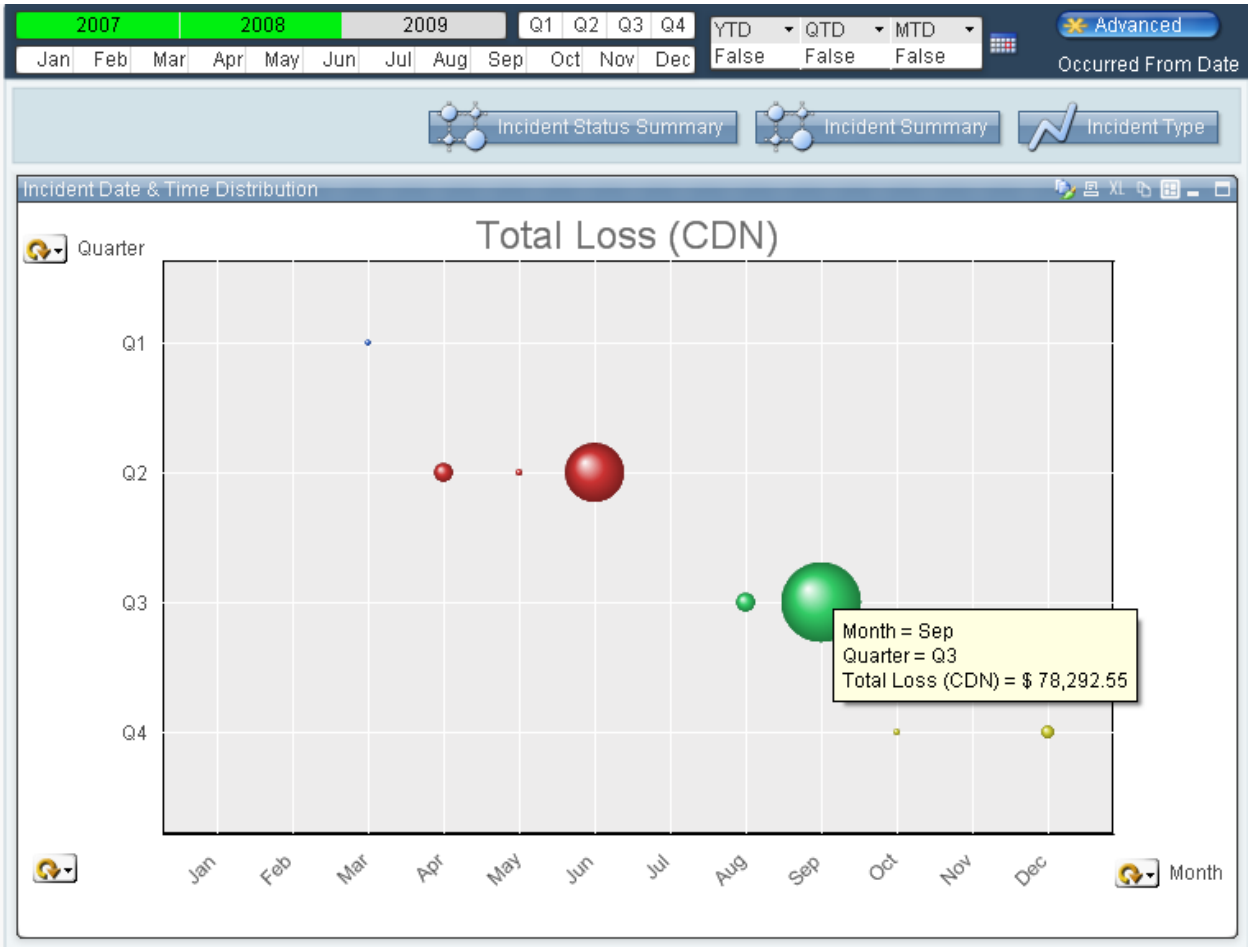

Incident Summary Charts

Like the other chart types in the Frequency section, Incident Summary charts compare losses, number of incidents, or some other cycle group dimension over two separate time periods. However, Incident Summary charts also add a fourth cycle group to the mix. For example, rather than just looking at the number of incidents per quarter and month (as you did in the last exercise), you could use an Incident Summary chart to look at the number of incidents per quarter and month by class (see the following screenshot).

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Let's practice...

1. Double-click the Incident Summary button under the Frequency tab.
2. Click Clear All.
3. Set the cycle group in the uppermost left corner to # of Incidents.
4. Set both the y-axis and x-axis cycle groups to Year.
5. Set the cycle group in the upper right corner to Site.
6. Select 2008 and 2009 in the date filter area above the chart. Your chart is now displaying the number of incidents per site in 2008 and in 2009.

Question

In which year did Site B have more incidents?

Answer

2008. (Hover your mouse over the pie sections representing Site B and compare the number of incidents.)

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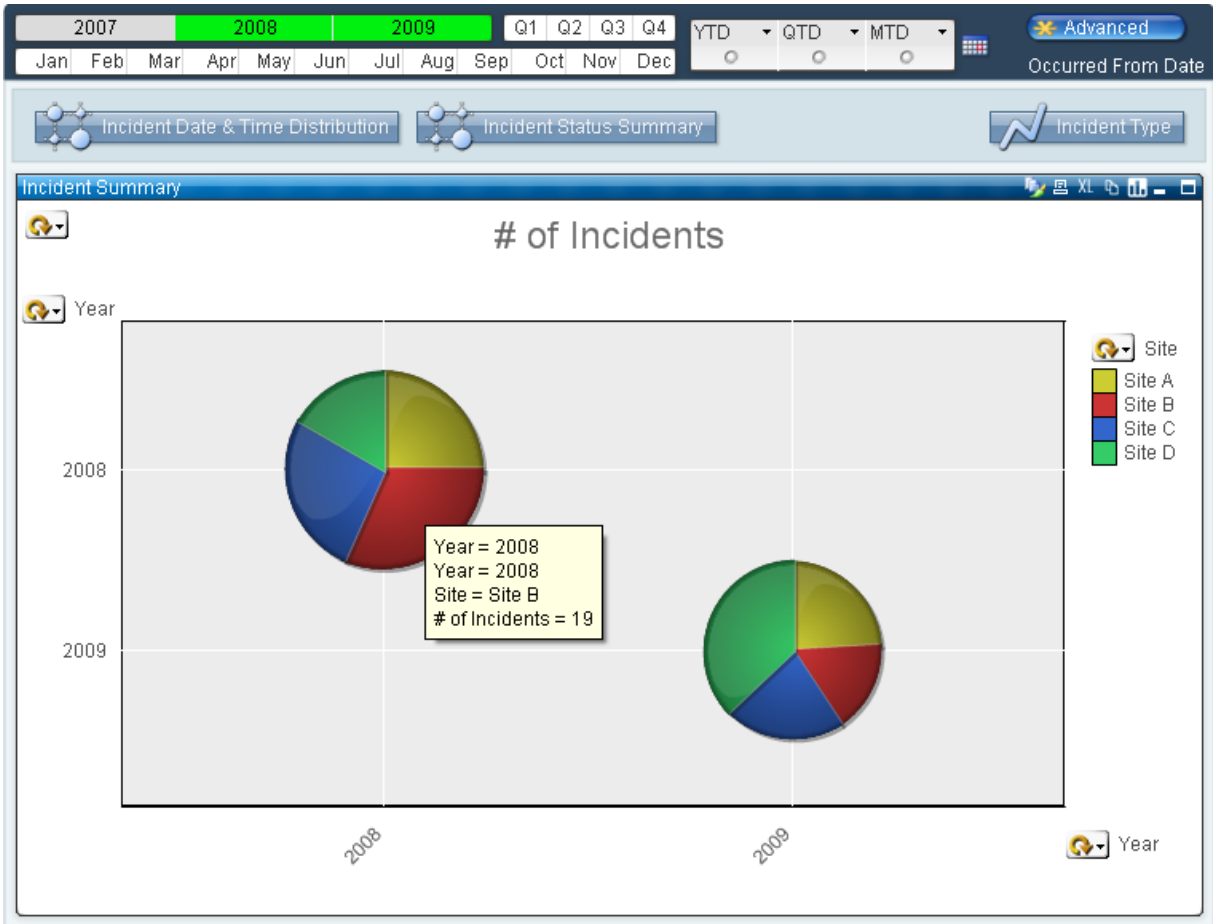

Question

Which site(s) suffered the highest total loss in 2008 and in 2009?

Answer

2008: Site B

2009: Site D

(Set the cycle group in the uppermost left corner to Total Loss, and observe which sites have the largest sections in the 2008 and 2009 pie charts.)

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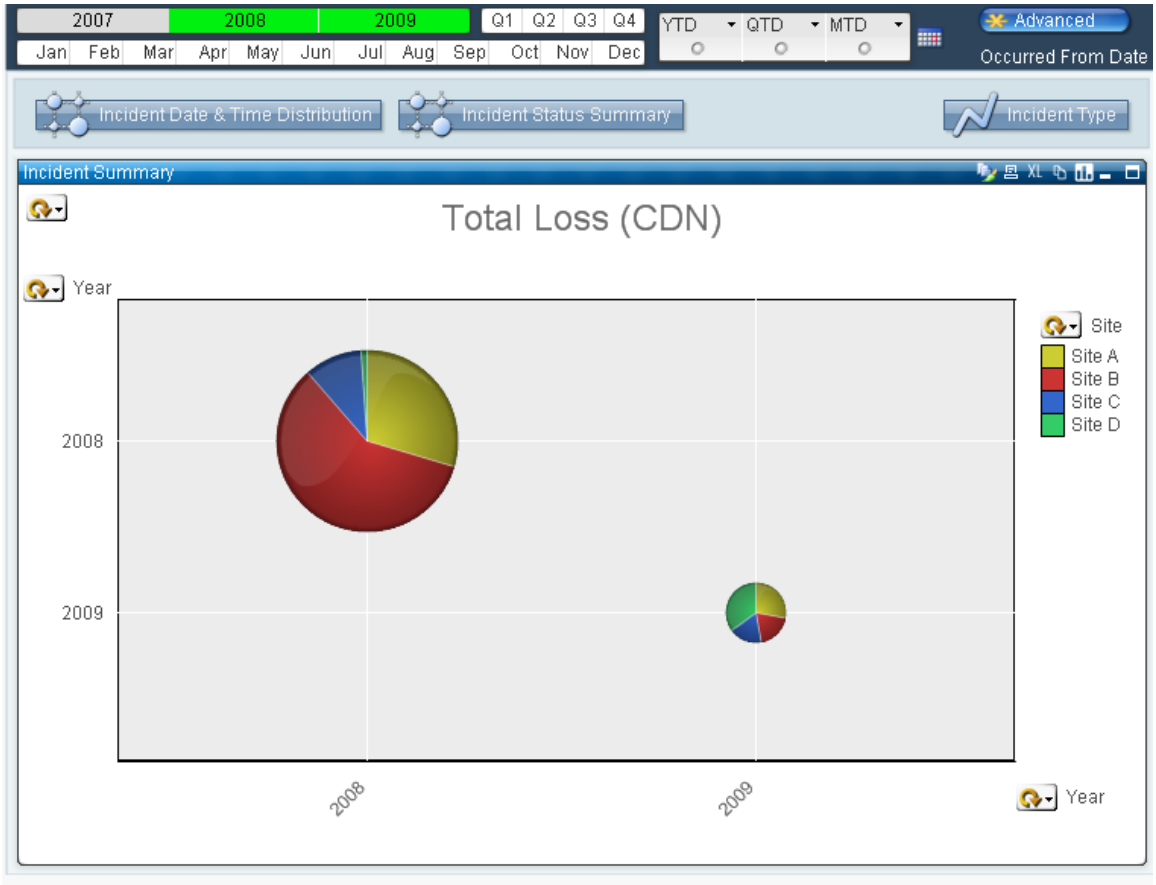

Question

In 2009, which category had the highest total losses?

Answer

Theft. (Set the cycle group in the top right corner to Category, and observe which category has the largest section of the 2009 pie chart. If the 2009 pie chart is difficult to see, highlight it to filter by this data only; the 2009 pie chart will now enlarge, filling the entire chart space.)

Question

In 2008, which two categories had the highest total losses?

Answer

Accidents and Fire. (If you filtered out your 2008 data for the previous question, then select 2008 in the date filter area above your chart to see the 2008 pie chart. Observe which categories have the two largest sections of the 2008 pie chart.)

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Question

How many fires occurred in 2008 and in 2009?

Answer

2008: Nine.

2009: Five.

(Ensure that both 2008 and 2009 are selected in the date area above your chart. Set the cycle group in the uppermost left corner to # of Incidents. Hover your mouse over the fire sections of the 2008 and 2009 pie charts, and note the number of incidents indicated in the pop-up boxes. Or, to make it easier to view fire data, click on the Fire category in the legend first; all the other categories will be filtered out, and only fire data will be charted.)

Question

Which month in 2009 had the highest number of incidents, and which workgroup had the most incidents during this month?

Answer

February, Workgroup C. (Clear all filters, except for the 2009 filter; set your x-axis cycle group to Month; and set the cycle group in the top right corner to Workgroup. Observe which month has the largest pie, and which workgroup has the largest section of that month's pie.)

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Question

In 2009, which month had the highest Direct Loss for Workgroup A?

Answer

March. (Set the cycle group in the uppermost left corner to Direct Loss; click on Workgroup A in the legend to filter out all the other workgroups, making the chart easier to read; and observe which month has the largest pie.)

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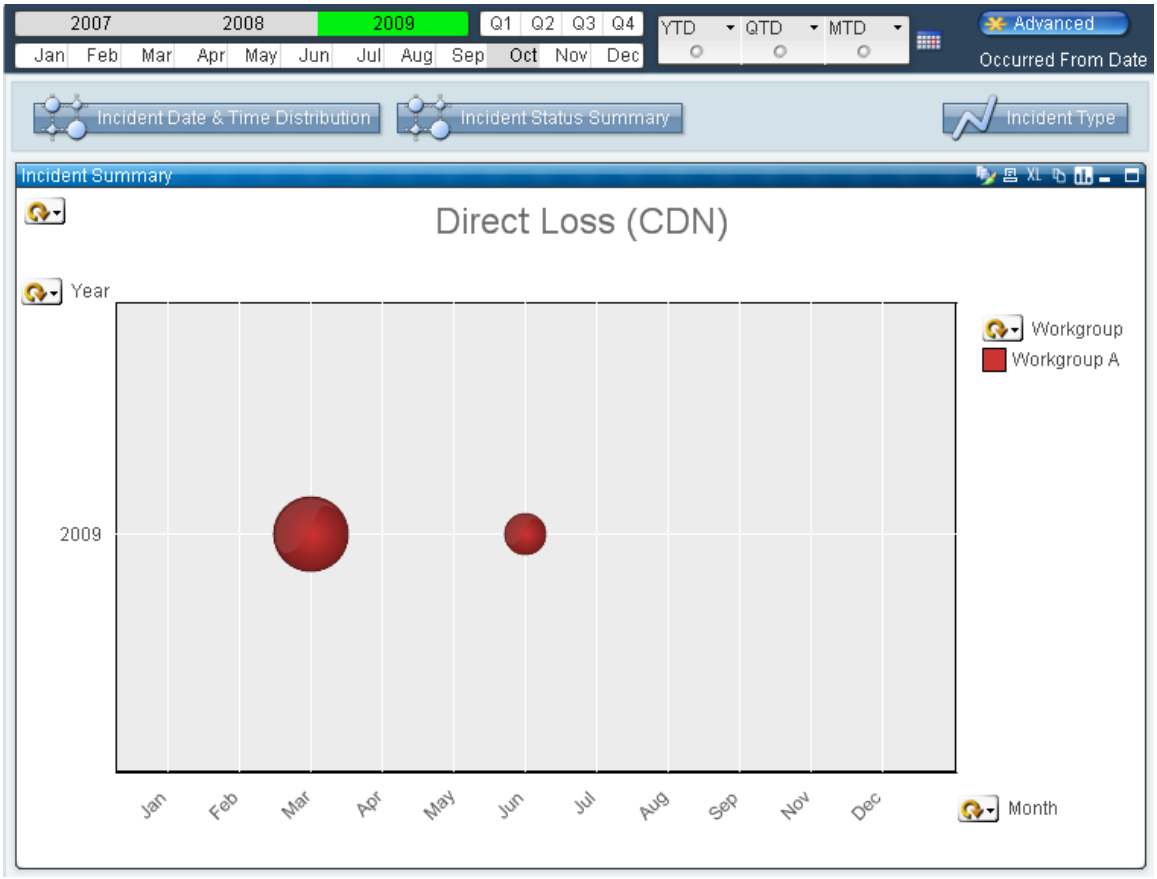

2007
2008
2009
Q1 Q2 Q3 Q4
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
YTD QTD MTD
Advanced
Occurred From Date
Incident Date & Time Distribution
Incident Status Summary
Incident Type
Incident Summary
Direct Loss (CDN)
Year
2009
Workgroup
Workgroup A
Jan Feb Mar Apr May Jun Jul Aug Sep Nov Dec
Month

Locations

The charts under the By Location tab allow you to analyze incident activity by site, business unit and workgroup. There are three chart types available in this section: Site Analysis, Business Unit Analysis and Workgroup Analysis.

Let's practice…

1. Double-click the Site Analysis button under the By Location tab.
2. Click Clear All.
3. Use the Fast Change button to change your chart to a bubble chart.

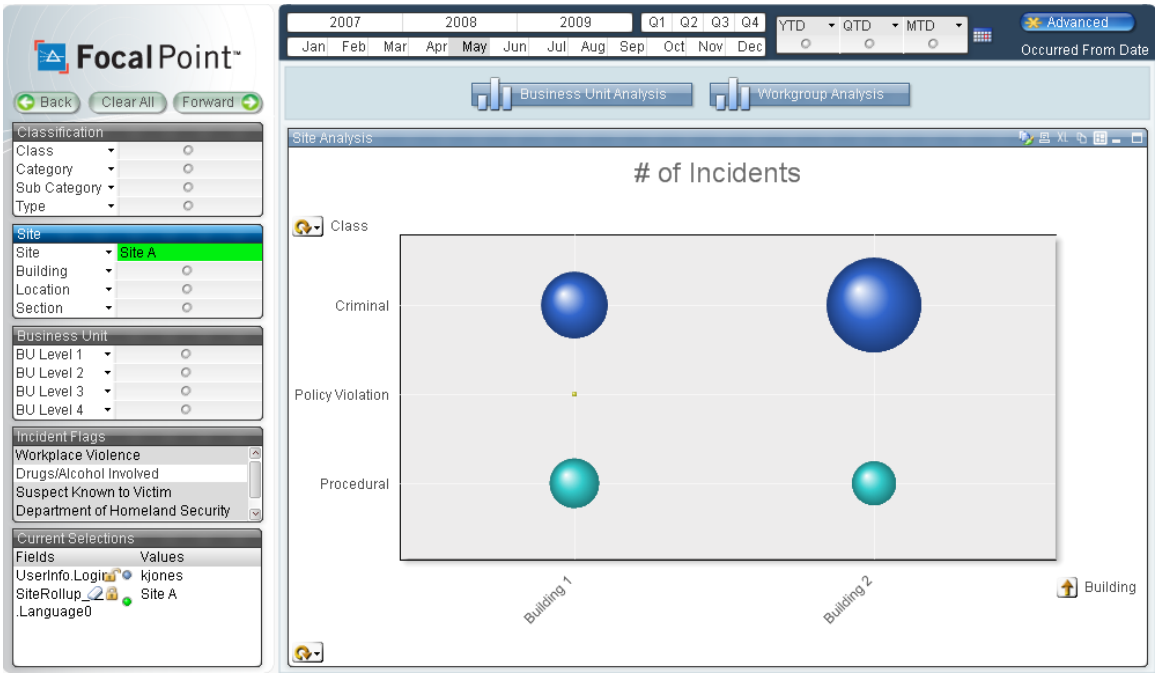
4. Select Site A from the filter area on the left.

Question

Which building at Site A had the most Criminal incidents?

Answer

Building 2. (The bubble where Building 2 intersects Criminal is the largest.)



5. Set the y-axis cycle group in the top left corner to Category.

Question

Which category is occurring most frequently at Site A, and in which building is it occurring the most?

Answer

Theft, Building 1. (The two Theft bubbles are the largest bubbles on the chart, and the Building 1 Theft bubble is the larger of the two. If you are uncertain exactly which bubbles are largest, hover your mouse over the bubbles and compare their supporting data.)

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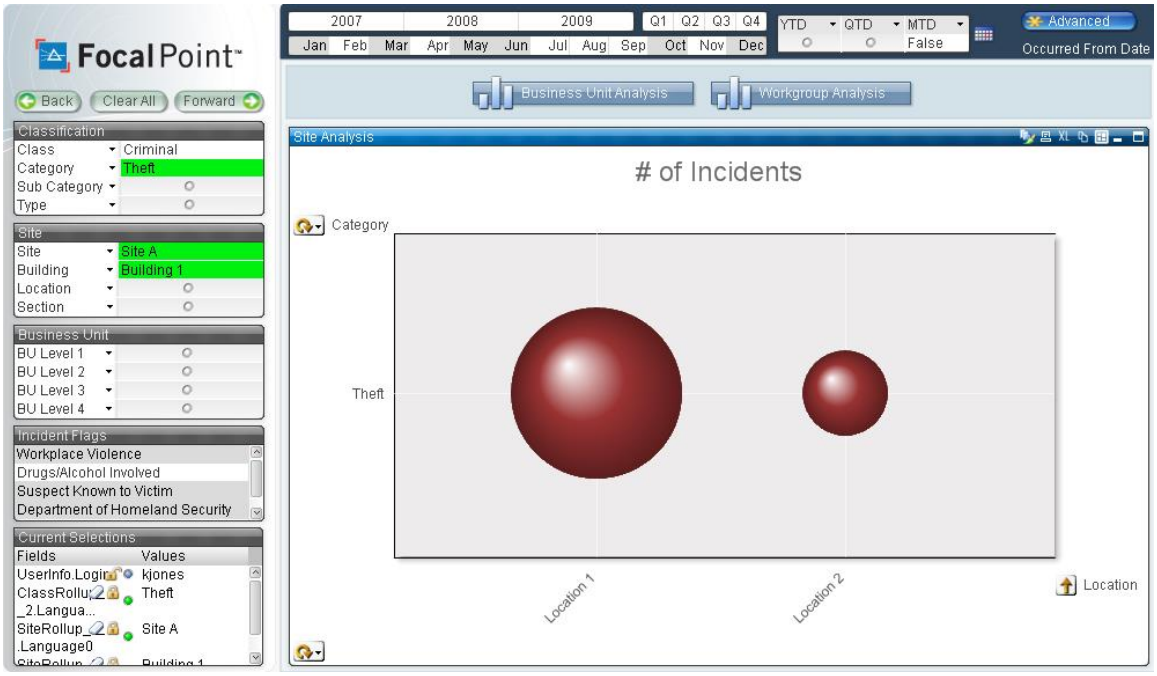
Question

Which location within Building 1 had the most thefts?

Answer

Location 1. (Click on the Building 1 Theft bubble to drill down into thefts at Building 1's locations; the Location 1 bubble is the largest.)



Question

What is the Total Loss value of the six thefts that occurred at Location 1?

Answer

$13,345.00. (Click on the Location 1 bubble to filter your chart down to thefts at Site A/Building 1/Location 1 only. Go to the Losses tab, double-click the Loss Detail Breakdown button, and read the complete Total Loss value in bold at the bottom of the table.)

6. Return to the By Location tab.

7. Double-click the Workgroup Analysis button.

8. Click Clear All.

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Question
Which workgroup had the most criminal incidents in 2009?

Answer
Workgroup B. (Select 2009 from the date filter area above the chart, set the cycle group in the top right corner to Class, and look for the highest Criminal column on the chart.)

Question
What are the two most commonly occurring categories for Workgroup B in 2009?

Answer
Theft and Emergency Situations. (Set the cycle group in the top right corner to Category, hover your mouse over the two highest columns charted for Workgroup B, and read the Category values in the pop-up boxes that appear.)

Question
Does this change for Q2 of 2009?

Answer
Yes. Theft is still the most common category for Workgroup B's incidents; however, Emergency Situations and Accidents are tied for the second most common category in Q2 of 2009. (Select Q2 from the date filter area above the chart. There are now only three columns charted for Workgroup B, two columns that are of equal height and one column that is higher; hover your mouse over the columns and read the Category values in the pop-up boxes that appear.)

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Demographics

The Demographics tab allows you to examine person data through a variety of statistical charts. There are four chart types available: Demographic Stats, Demographic Stats by Rollups, Involvement Timeline and Person Details.

Let's practice…

1. Double-click the Demographic Stats button under the Demographics tab.
2. Click Clear All.
3. Set the y-axis cycle group (in the top left corner of the chart) to Gender.
4. Set the cycle group in the bottom left corner of the chart to Net Loss by Demographics.
5. Set the cycle group in the top right corner of the chart to Involvement Type.
6. Set the x-axis cycle group (in the bottom right corner of the chart) to Age Range.
7. Highlight all y-axis labels, except <Blank>.

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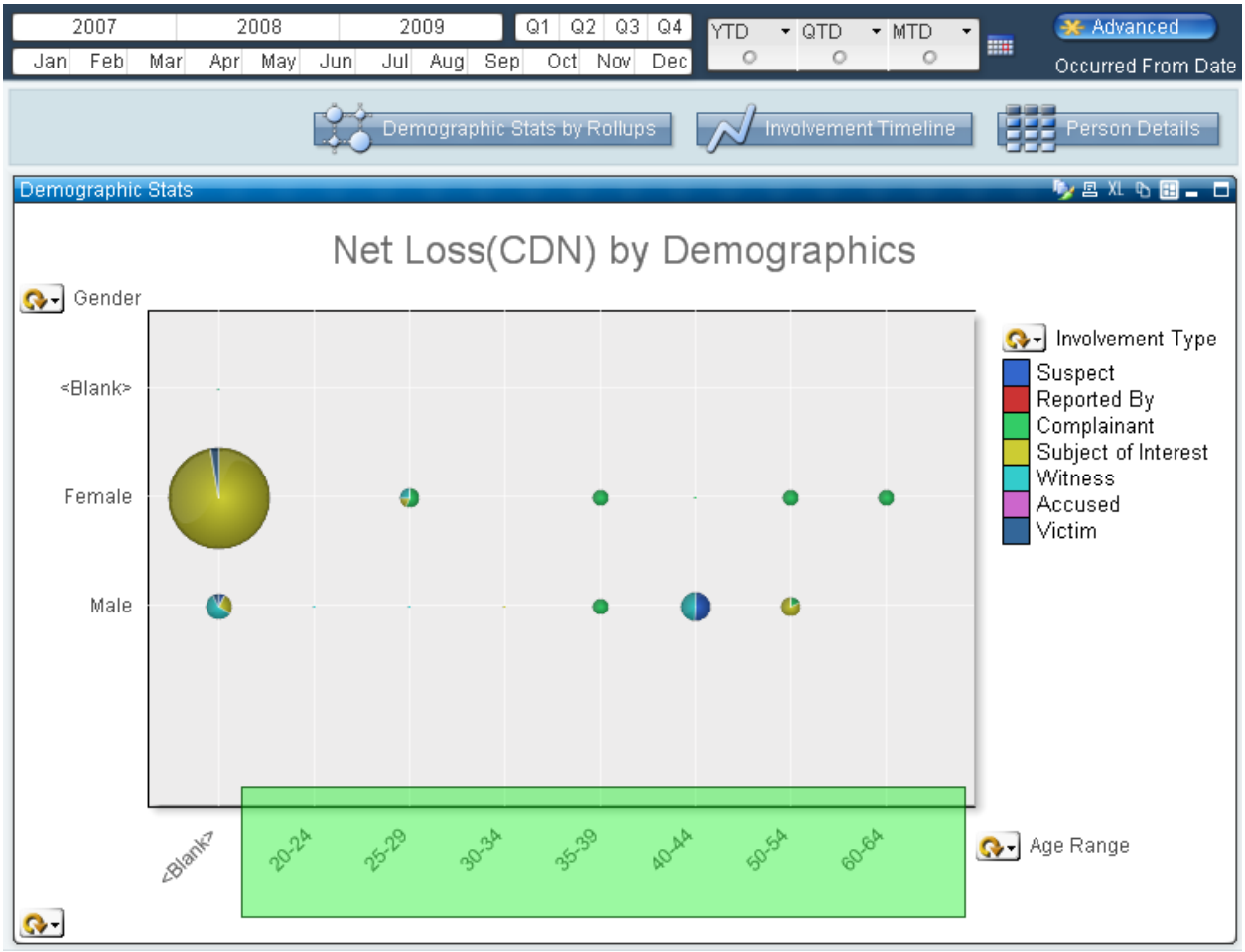
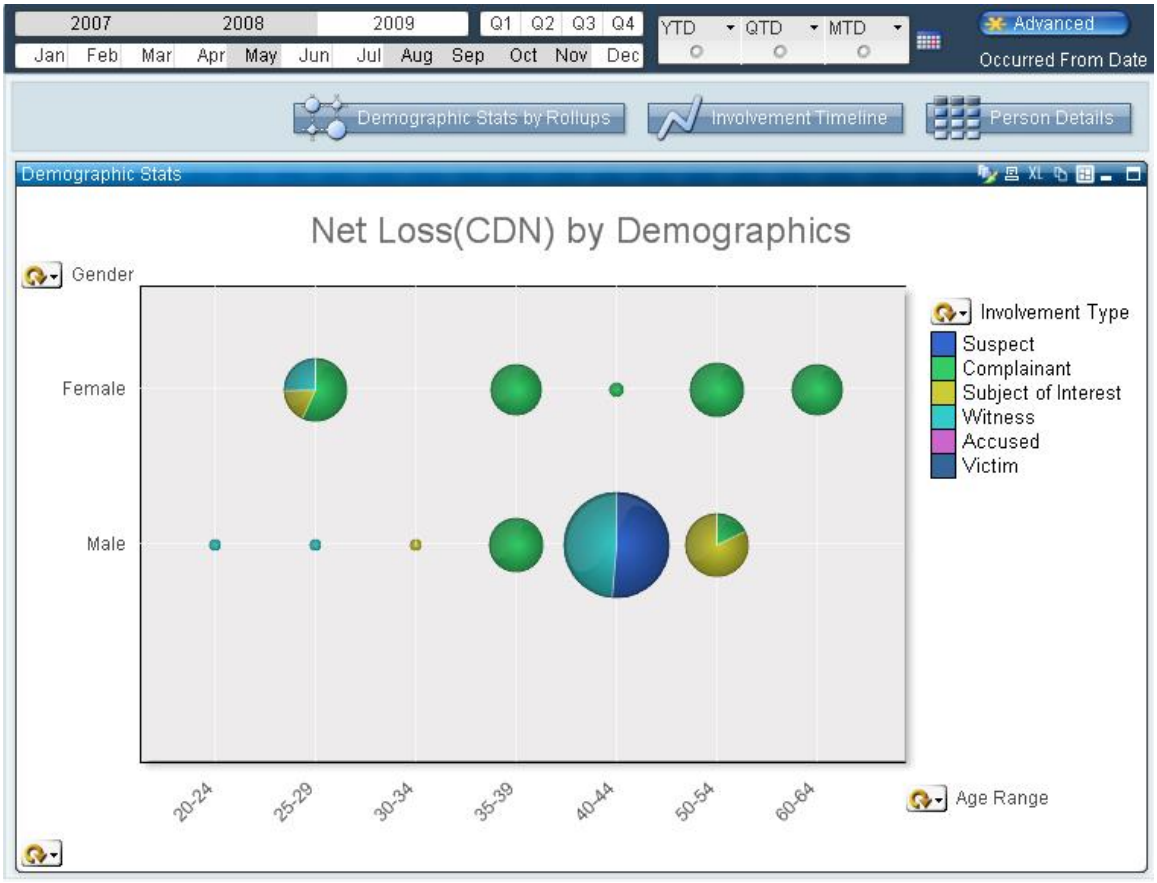


8. Your chart is now displaying incident Net Loss broken down by involved persons' Gender, Age Range (ages 20–64 only) and Involvement Type.



9. Set the cycle group in the bottle left corner of the chart to # of Involvements.

10. Set the y-axis cycle group (in the top left corner of the chart) to Age Range.

11. Click on the Suspect value in the Involvement Type legend.

Question

How many involved persons between the ages of 40 and 44 are suspects?

Answer

Three. (Hover your mouse over the pie chart and read the # of Involvements value.)

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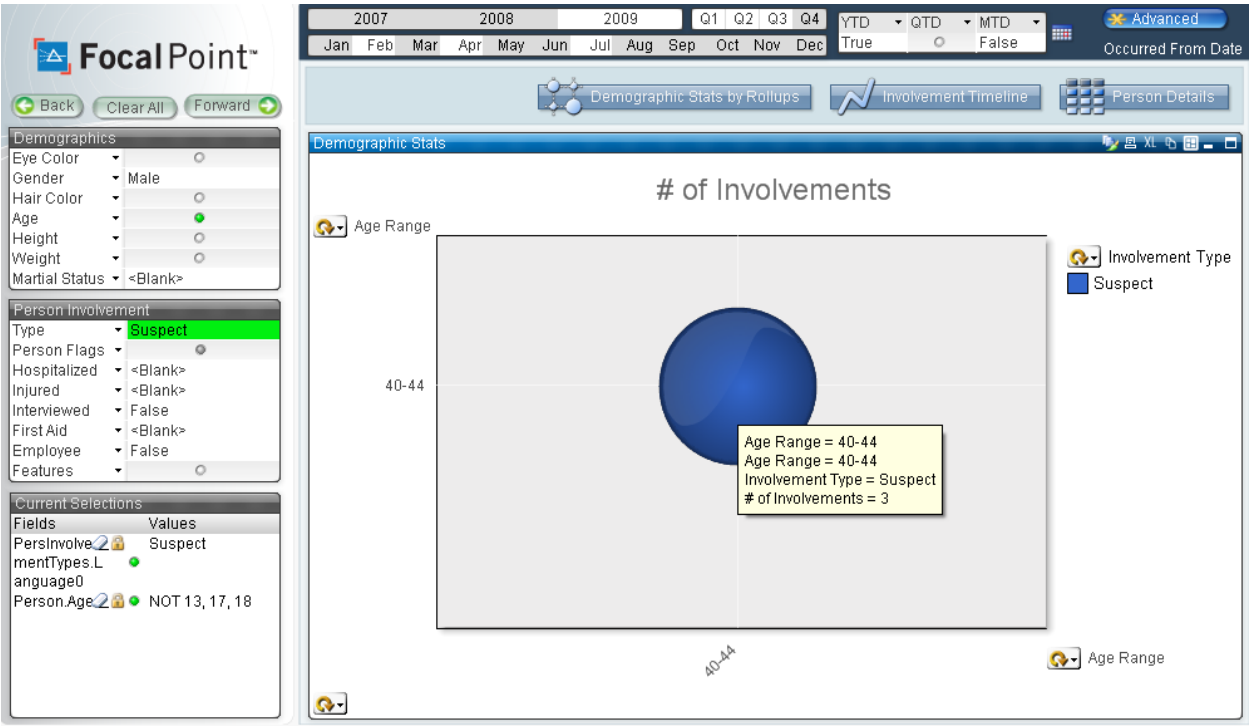


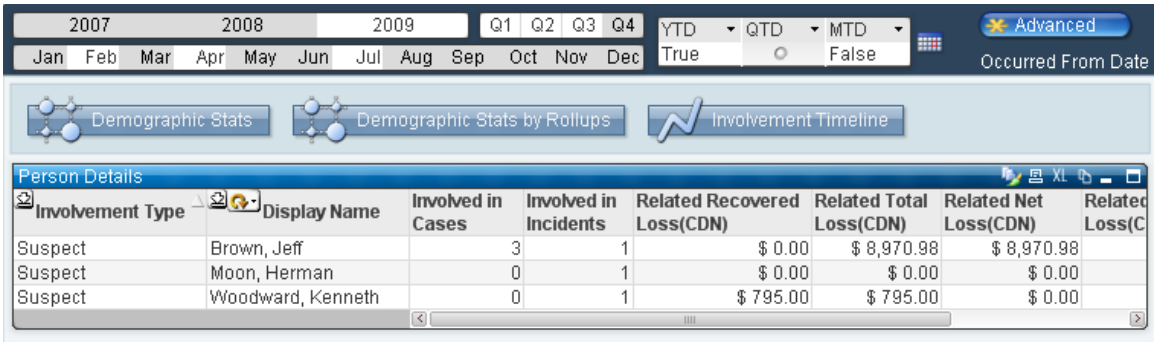
12. To find out more about the three involved persons appearing on your chart, double-click the Person Details button. (The Person Details tab allows you to explore specific record details in-depth.)

Question

What are the names of the three suspects between the ages of 40 and 44?

Answer

Jeff Brown, Herman Moon and Kenneth Woodward.



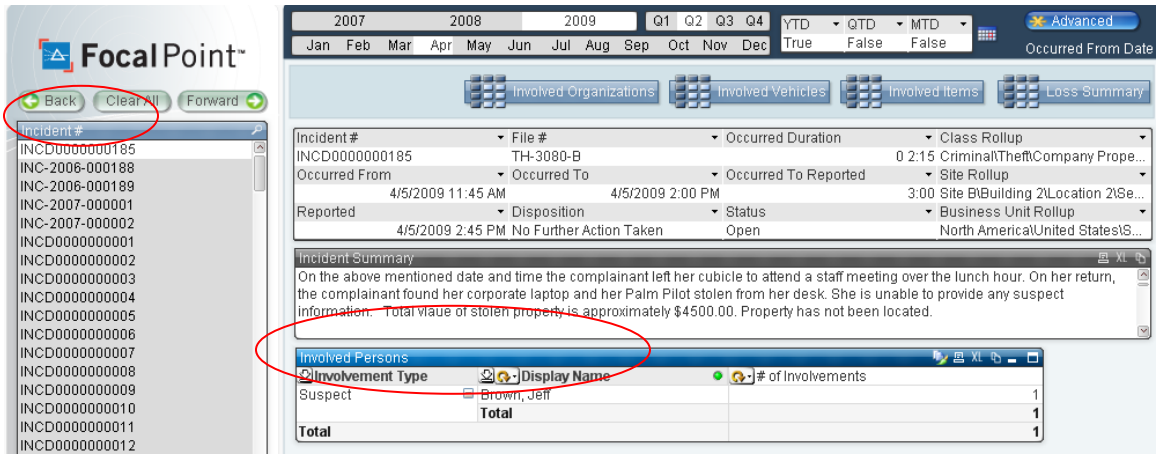
13. Click on Jeff Brown. This will reduce the table to this one particular line item, and filter out data from the other two involved person records. Note that Jeff Brown is a suspect in three cases and in one incident.

Question

What is the Incident Number for the incident that Jeff Brown is involved in as a suspect?

Answer

INCD0000000185. (Click on the Incident Details tab. The one incident that Jeff Brown is involved in as a suspect is highlighted in white in the column on the left, and its record details are displayed on the right. Note that Jeff Brown appears in the Involved Persons section below the main record details, and he is listed as a Suspect.)



Question

Was an investigation opened for this incident? If so, when was the investigation started, what is its disposition and who are the investigators?

Answer

Yes, an investigation was opened on April 5, 2009. It is assigned a disposition of No Further Action Taken. Ian Davis is the sole investigator. (Click on the Investigation Details tab. INCD0000000185 is highlighted in white in the column on the left, and its investigation details are displayed on the right. Read the Disposition and Start values, and double-click the Investigators button to find the investigator's Name.)

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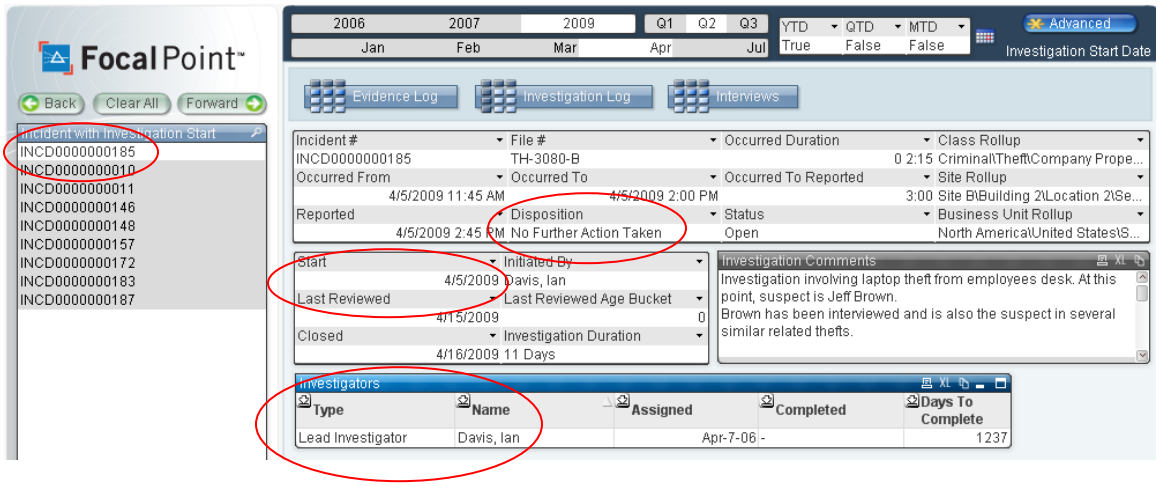
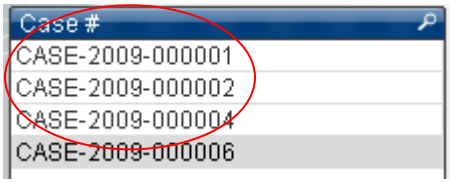


Question

What are the Case Numbers for the three cases that Jeff Brown is involved in as a suspect?

Answer

CASE-2009-000001, CASE-2009-000002 and CASE-2009-000004. (Click on the Case Details tab, and read the three Case Numbers highlighted in white in the column on the left.)



Question

What is the name of CASE-2009-000004, who is the Case Manager, and what is the case's Total Loss value?

Answer

Brown Laptop Thefts is the Case Name, Derek Owens is the Case Manager and $8,970.98 is the Total Loss value attributed to the case. (Select CASE-2009-000004 from the column on the left; the record details will appear on the right. Read the Case Name and Manager values. Double-click the Loss Summary button to find the case's Total Loss value.)

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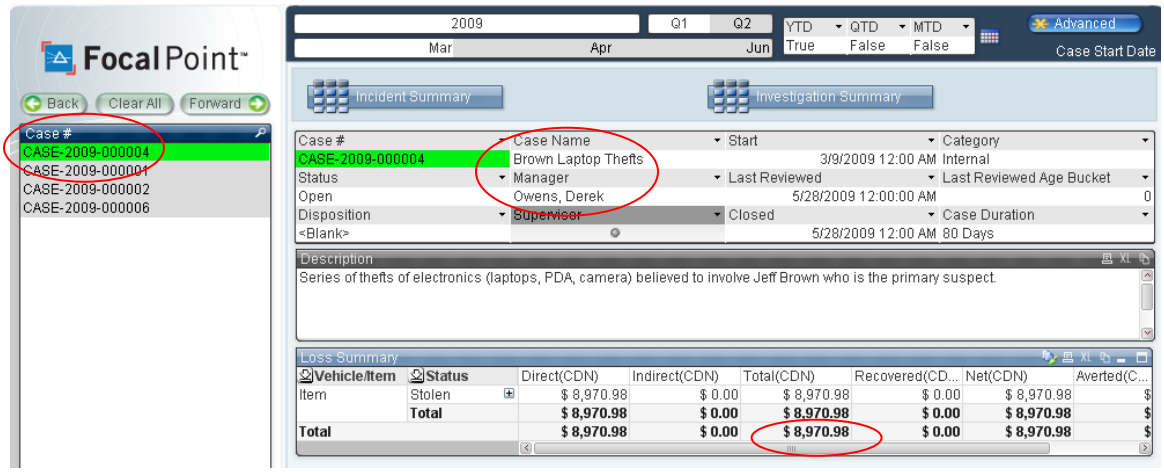
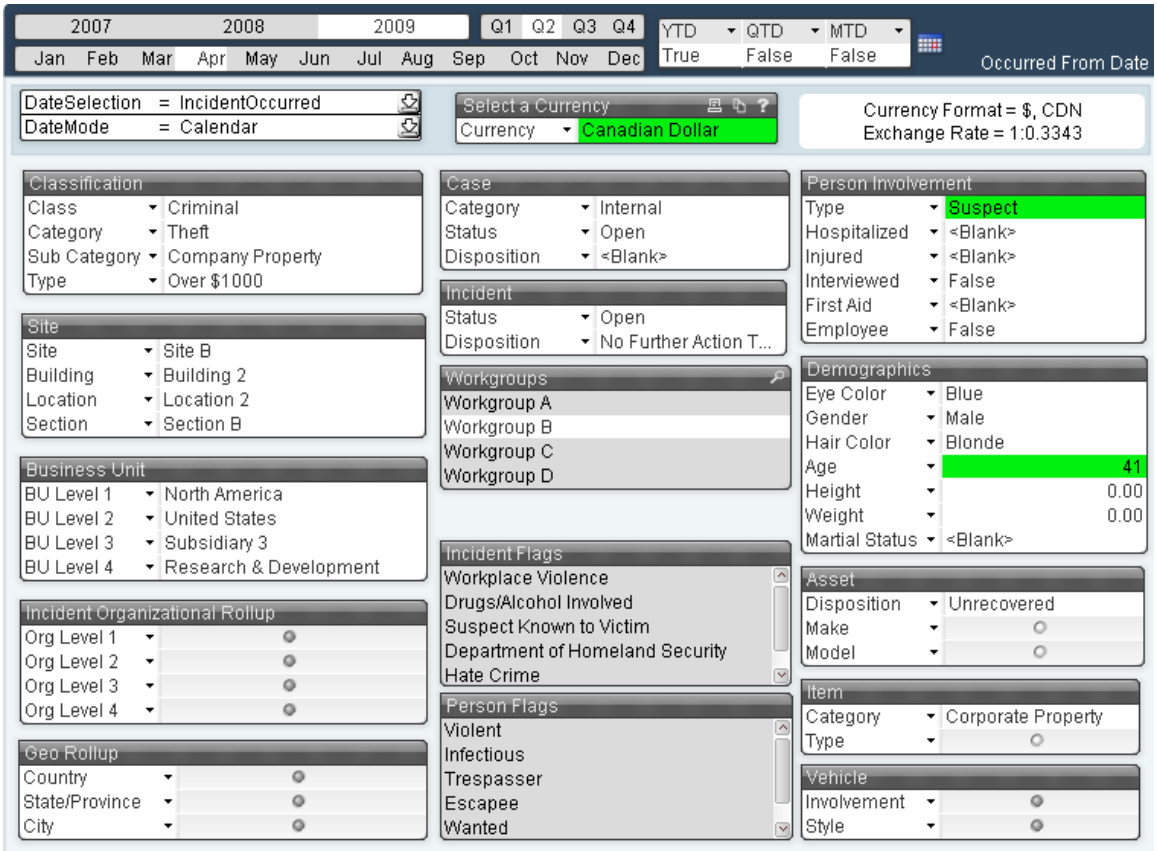


14. To see record details associated with CASE-2009-000004 and INCD0000000185 in another format, click on the Advanced tab.



Investigations

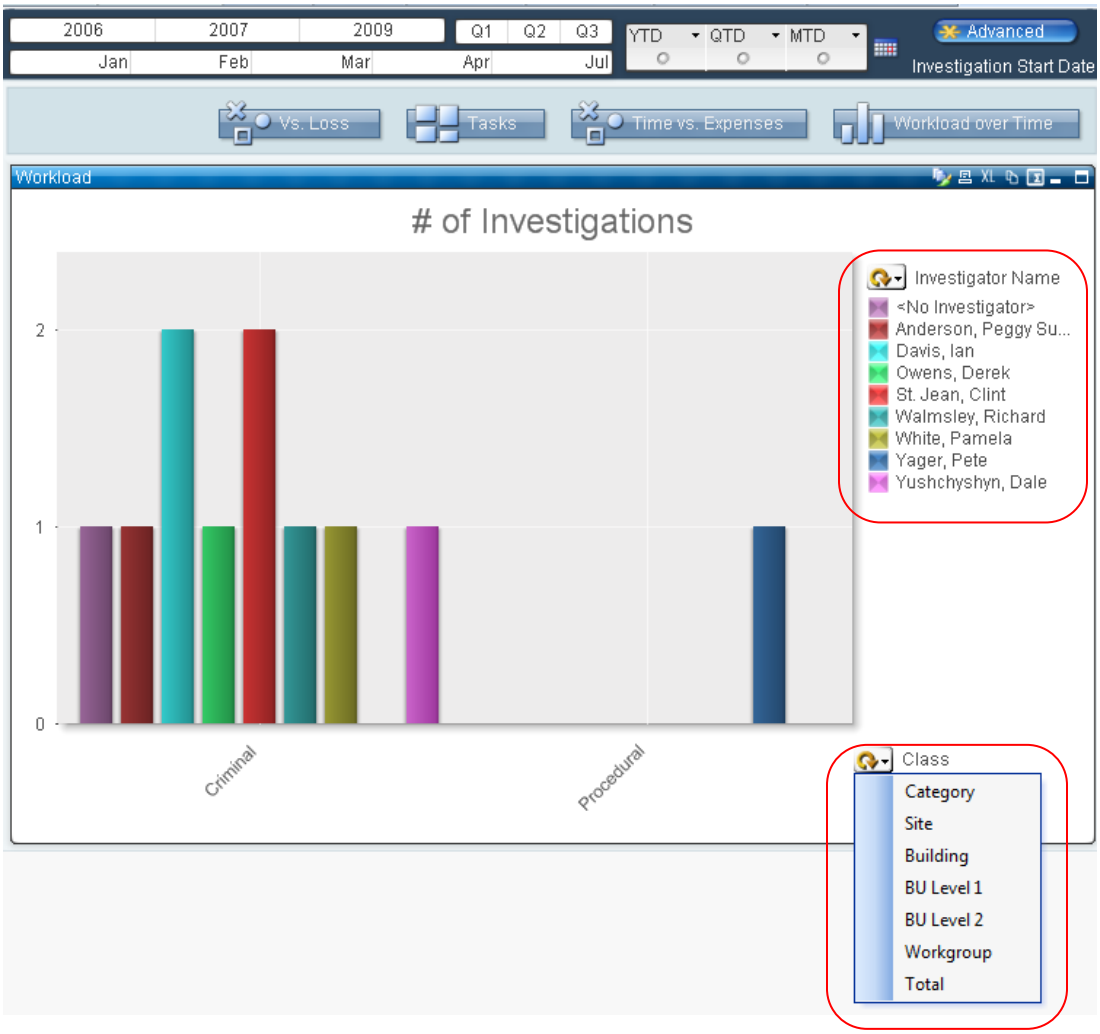
The Investigations tab allows you to analyze key investigative metrics. There are five chart types available: Workload, Vs. Loss, Tasks, Time vs. Expenses and Workload Over Time.

Let's practice…

1. Double-click the Workload button under the Investigations tab.

2. Click Clear All.

3. Note there are two cycle groups on the right side of the chart. The upper right cycle group allows you to cycle through Investigator Name and Investigator Type, and the y-axis cycle group (on the lower right side of the chart) allows you to cycle through Class, Site, Workgroup and various other metrics.



4. Set your y-axis cycle group (on the lower right side of the chart) to Total. Your chart will now display the total number of investigations (workload total) assigned to each investigator.

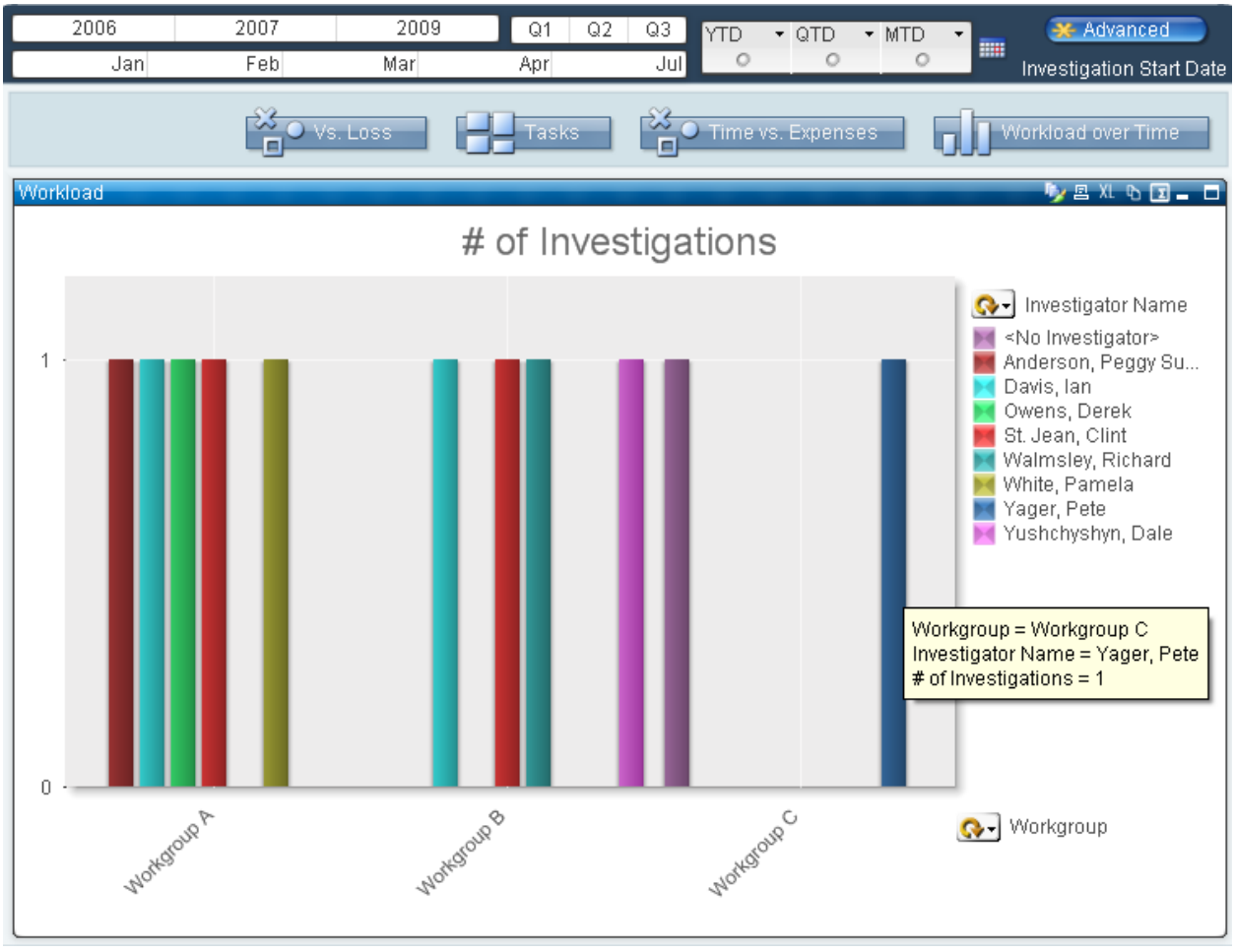
5. Set your y-axis cycle group to Workgroup.

Question

Who is the only investigator in Workgroup C with an investigation assigned to them?

Answer

Pete Yager. (Observe which columns belong to Workgroup C. There are two: one with no assigned investigator, and one assigned to Pete Yager.)



Question

Which investigator had the most assigned investigations in Q1 of 2007?

Answer

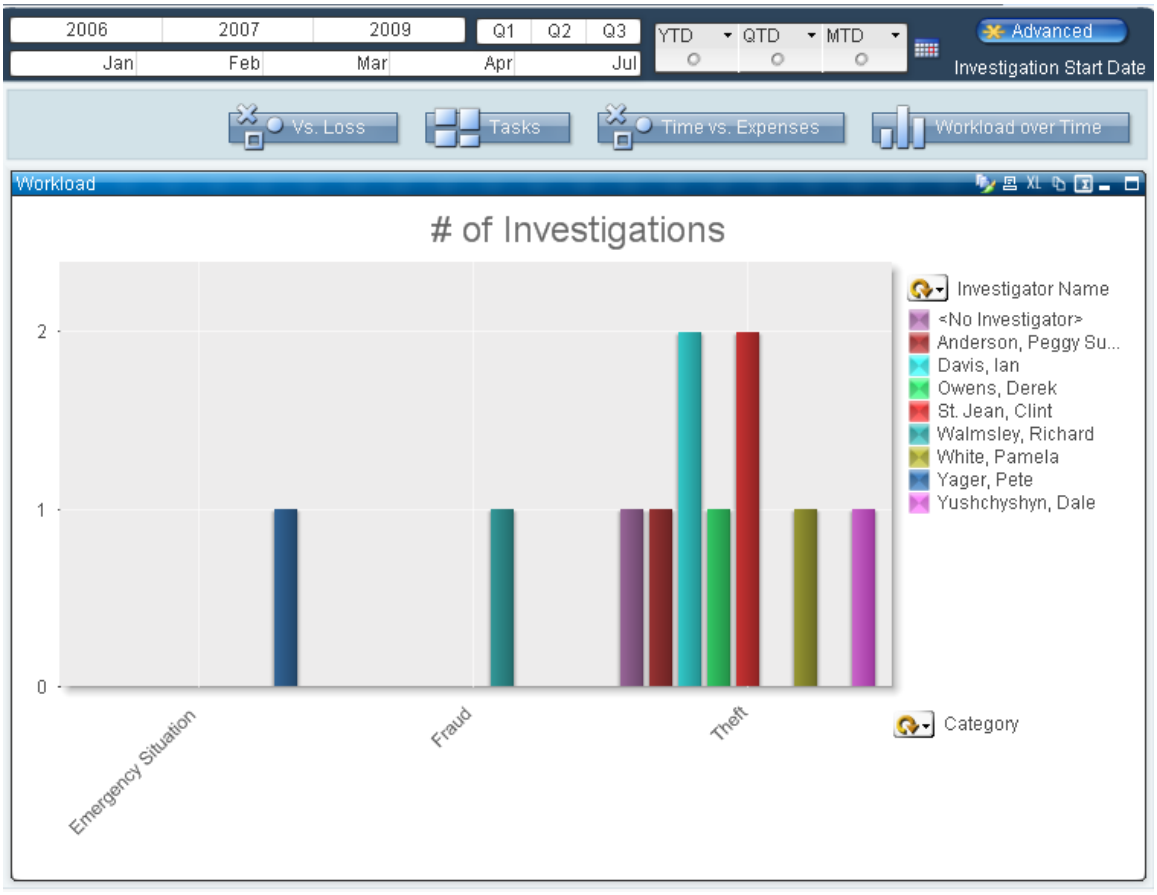
Clint St. Jean. (Select 2007 and Q1 from the date filter area above the chart. There is one investigation charted for this time period; it is assigned to Clint St. Jean.)

Question

Overall, which category had the most investigations?

Answer

Theft. (Click Clear All to erase all parameters, set the y-axis cycle group to Category and observe which category has the most columns charted.)



Workload Over Time Charts

Like Workload Charts, Workload Over Time charts allow you to analyze investigative workload by Investigator Name or Investigator Type. However, the y-axis cycle group (on the lower right side of the chart) offers options such as Year, Quarter and Month (rather than Class, Site, etc.), allowing you to analyze workload over particular time periods. As well, an additional cycle group on the x-axis allows you to specify what kind of workload you would like to analyze. For instance, rather than just examining the number of investigations assigned, you can examine expenses, time spent, or even the number of investigations closed.

Let's practice...

1. Double-click the Workload Over Time button under the Investigations tab.
2. Click Clear All.
3. Ensure the cycle group on the upper right side of the chart is set to Investigator Name, and the y-axis cycle group is set to Year.
4. Set the x-axis cycle group on the lower left side of the chart to Time Spent.

Question
Which investigator spent the most time working on investigations? How much time did they spend in total?

Answer
Ian Davis, 2 days and 4 hours. (Hover your mouse over the highest column on the chart and read the Investigator Name and Time Spent values.)

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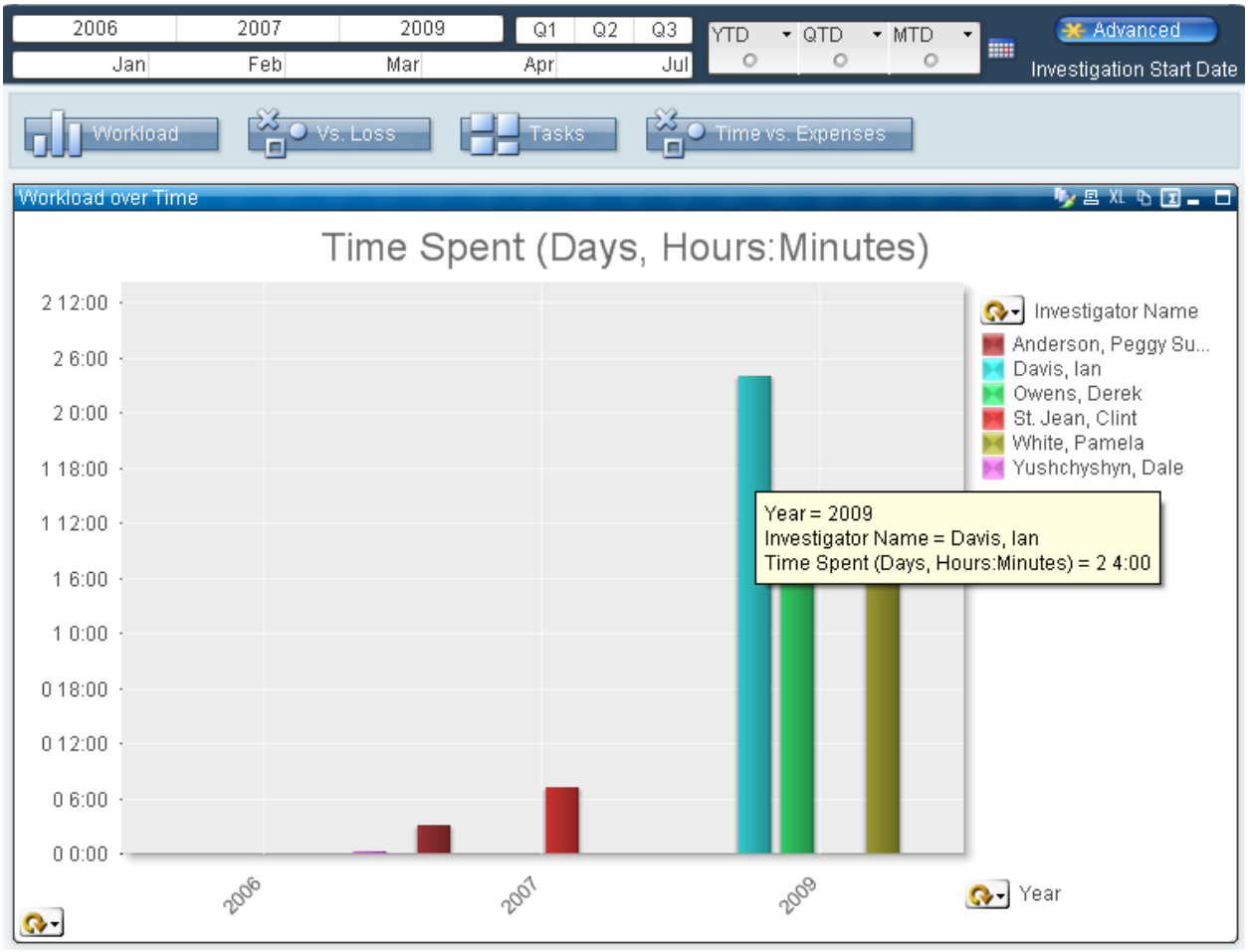

Question

Which investigator closed the most investigations in 2009?

Answer

Ian Davis. (Set the x-axis cycle group to Investigations Closed, hover your mouse over the highest 2009 column, and read the Investigator Name value.)

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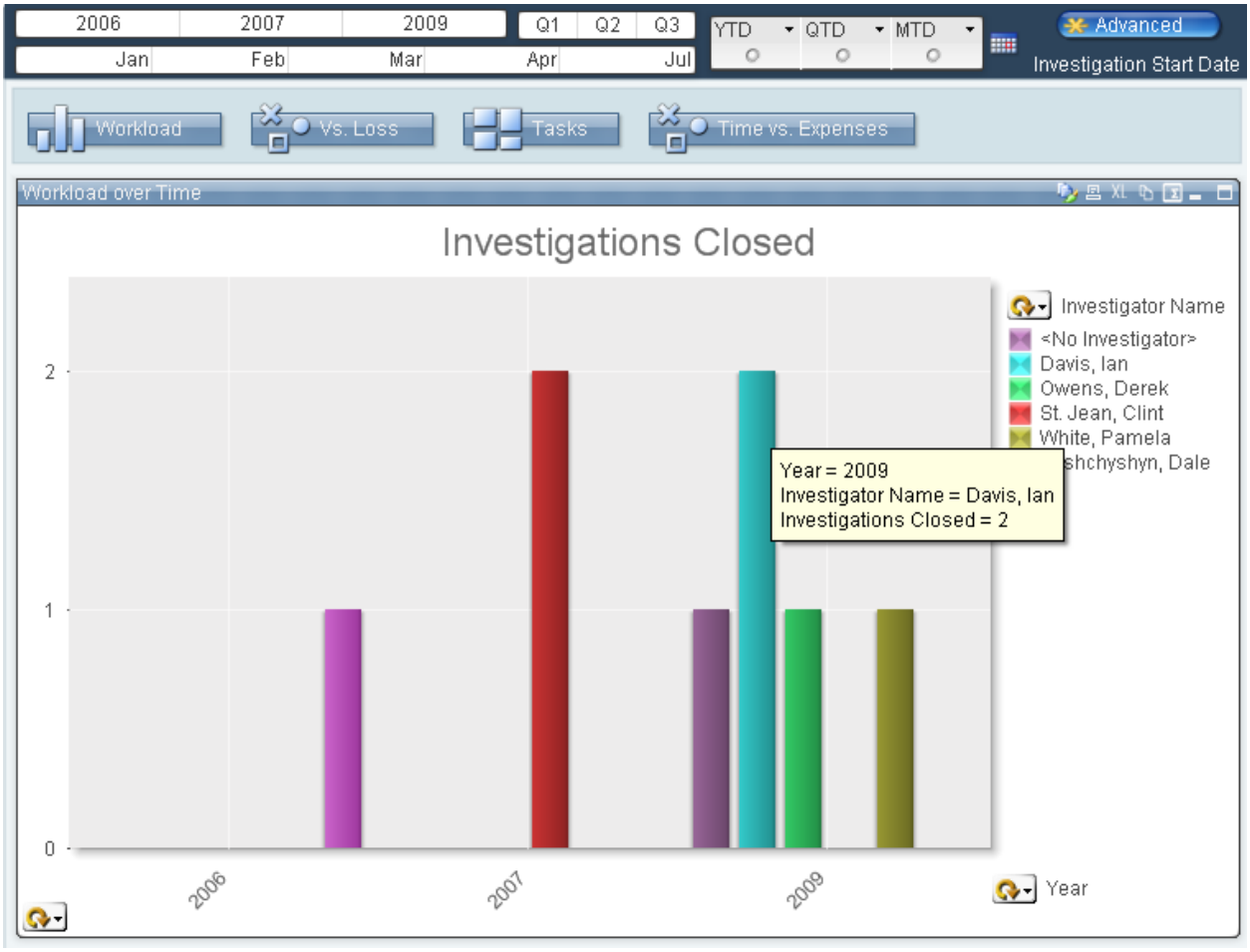
2006
2007
2009
Q1
Q2
Q3
Jan
Feb
Mar
Apr
Jul
YTD
QTD
MTD
Advanced
Investigation Start Date
Workload
Vs. Loss
Tasks
Time vs. Expenses
Workload over Time
Investigations Closed
Investigator Name
<No Investigator>
Davis, Ian
Owens, Derek
St. Jean, Clint
White, Pamela
shchyshyn, Dale
Year = 2009
Investigator Name = Davis, Ian
Investigations Closed = 2
2
1
0
2006
2007
2009
Year

Cases

The Cases section allows you to study case data, including data drawn from incidents and investigations linked to cases, through a variety of metrics. There are four chart types available under the Cases tab: Case Summary, Case Workload, Case Incident Summary and Case Investigator Workload.

Let's practice…

1. Double-click the Case Summary button under the Cases tab.
2. Click Clear All.
3. Set the y-axis cycle group (in the top left corner of the chart) to Workgroup.
4. Set the cycle group in the bottom left corner of the chart to Incidents.
5. Set the cycle group in the top right corner of the chart to Class.
6. Set the x-axis cycle group (in the bottom right corner of the chart) to Case Name.
7. Your chart will now display the number of incidents linked to each case by Workgroup and by Class.

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Question

Which two workgroups have incidents that are linked to the Brown Laptop Thefts case? What classes are these incidents?

Answer

Workgroup A and Workgroup B each have one Criminal incident linked to the Brown Laptop Thefts case. (Observe which workgroups have pie charts plotted for the Brown Laptop Thefts case, hover your mouse over the pie charts, and read the Class values.)

8. Set the y-axis cycle group to Total.

9. Set the cycle group in the top right corner of the chart to Category.

10. Your chart will now display the total number of incidents linked to each case by Category.

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Question

How many different theft incidents are linked to the cases charted?

Answer

Four. (Click on Theft in the legend to filter out the other categories, and use the Fast Change button to change your chart into a data table. You will notice that the Brown Laptop Thefts case has two theft incidents linked to it; the Jeff Brown Restraining Order case has three theft incidents linked to it; and the Electronic Theft Case-09/04 has three theft incidents linked to it. However, the total number of theft incidents listed at the top of the table in bold is four. This is because some of the theft incidents are linked to more than one case. Although it may appear at first glance that eight theft incidents are linked to the cases on the chart, there are actually only four different theft incidents linked to these cases.)

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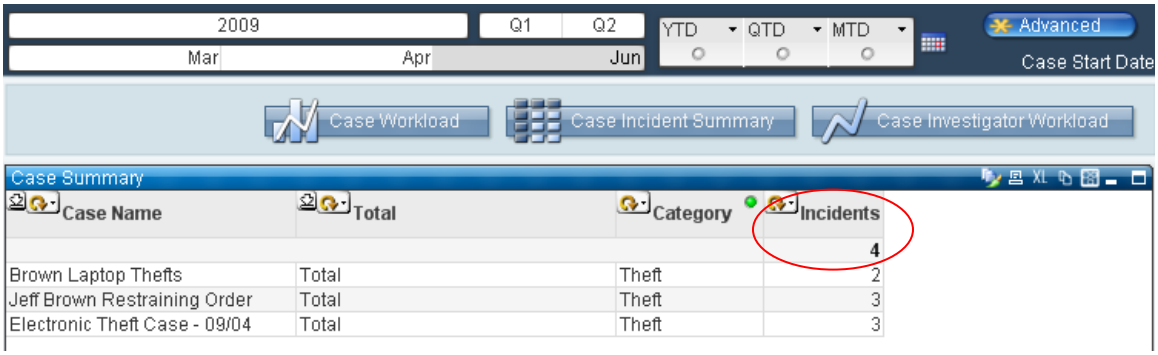
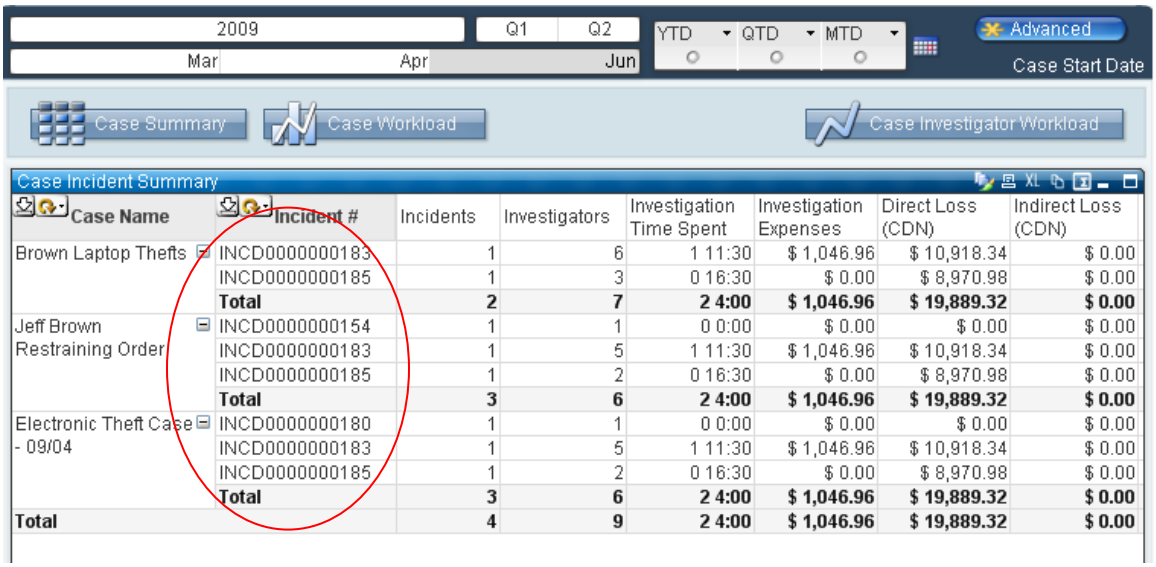


Case Name	Total	Category	Incidents
			4
Brown Laptop Thefts	Total	Theft	2
Jeff Brown Restraining Order	Total	Theft	3
Electronic Theft Case - 09/04	Total	Theft	3

11. Double-click the Case Incident Summary button.

12. Expand the nodes appearing next to each Case Name to see details for each of the case's linked incidents.

13. You will notice that although each of the three cases has two or three linked incidents, in total, only four different incidents are linked to the cases: INCD0000000183, INCD0000000185, INCD0000000154 and INCD0000000180.



Case Name	Incident #	Incidents	Investigators	Investigation Time Spent	Investigation Expenses	Direct Loss (CDN)	Indirect Loss (CDN)
Brown Laptop Thefts	INCD0000000183	1	6	1 11:30	$ 1,046.96	$ 10,918.34	$ 0.00
	INCD0000000185	1	3	0 16:30	$ 0.00	$ 8,970.98	$ 0.00
	Total	**2**	**7**	**2 4:00**	**$ 1,046.96**	**$ 19,889.32**	**$ 0.00**
Jeff Brown Restraining Order	INCD0000000154	1	1	0 0:00	$ 0.00	$ 0.00	$ 0.00
	INCD0000000183	1	5	1 11:30	$ 1,046.96	$ 10,918.34	$ 0.00
	INCD0000000185	1	2	0 16:30	$ 0.00	$ 8,970.98	$ 0.00
	Total	**3**	**6**	**2 4:00**	**$ 1,046.96**	**$ 19,889.32**	**$ 0.00**
Electronic Theft Case - 09/04	INCD0000000180	1	1	0 0:00	$ 0.00	$ 0.00	$ 0.00
	INCD0000000183	1	5	1 11:30	$ 1,046.96	$ 10,918.34	$ 0.00
	INCD0000000185	1	2	0 16:30	$ 0.00	$ 8,970.98	$ 0.00
	Total	**3**	**6**	**2 4:00**	**$ 1,046.96**	**$ 19,889.32**	**$ 0.00**
Total		**4**	**9**	**2 4:00**	**$ 1,046.96**	**$ 19,889.32**	**$ 0.00**

Case Workload Charts

Case Workload charts allow you to track the number of open, closed and ongoing cases (workload) over a span of time.

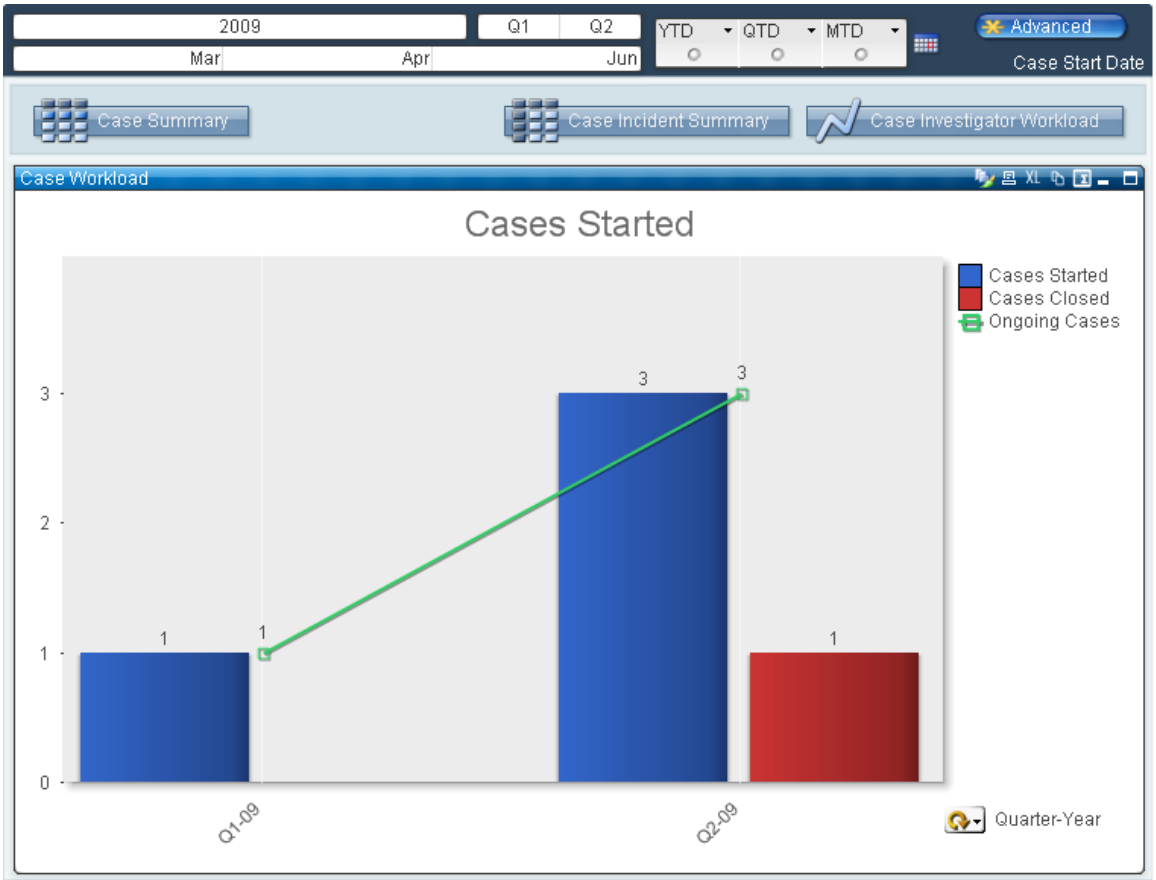
Let's practice...

1. Double-click the Case Workload button under the Cases tab.

2. Click Clear All.

3. Set the x-axis cycle group (in the bottom right corner of the chart) to Quarter-Year.

4. Your chart will display columns for the number of cases started and the number of cases closed for each quarter of every year (in this case, Q1 and Q2 of 2009). As well, a line, placed over the columns, will track the number of ongoing cases during this span of time (by subtracting the total number of cases closed from the total number of cases started and plotting the difference).



Question

How many ongoing cases were there in Q2 of 2009? How was this number calculated?

Answer

There were three ongoing cases in Q2 of 2009. Between Q1 of 2009 and Q2 of 2009, a total of four cases were started, and one was closed. Four cases started minus one case closed equals three ongoing cases.

5. Set the x-axis cycle group to Month-Year.

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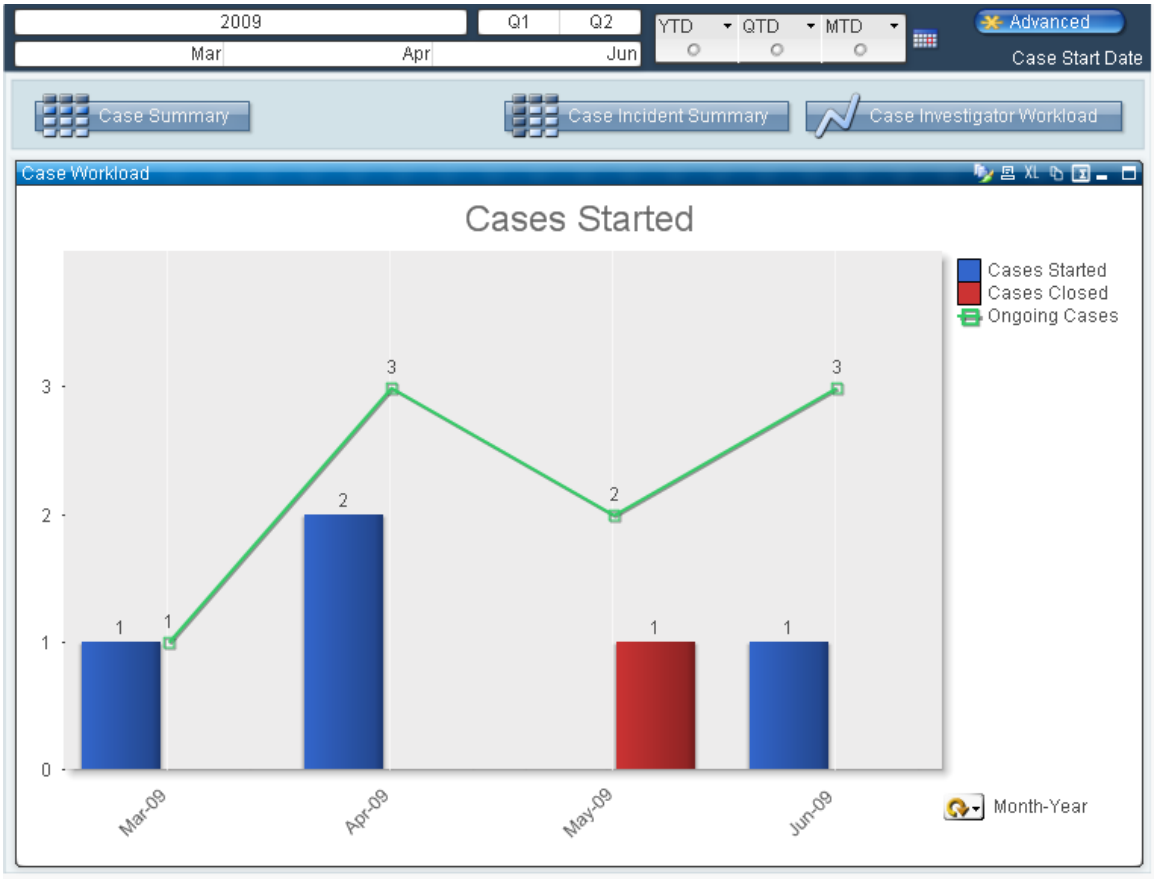
6. Your chart will now display the number of cases started, closed and ongoing for each month of every year.



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