



PERSPECTIVE WORKFLOW

OUT-OF-THE-BOX EVENT PACKS



Perspective Workflow comes pre-packaged with over 100 workflows to help you manage communications and drive processes across Dispatching, Activity Tracking, Incident Reporting, and Investigation and Case Management.

ACTIVITIES

Event Name	Event Description
Activities - Access Level 'X'	Returns all Activities that have a specific Access Level. 'X' can be any number between 1 and 5. (It is recommended that you schedule this event to run once per day.)
Activities - Closed Last Month	Returns all Activities that were closed the previous calendar month. (It is recommended that you schedule this event to run once per month.)
Activities - Closed Last Quarter	Returns all Activities that were closed the previous calendar quarter. (It is recommended that you schedule this event to run once per quarter.)

PERSPECTIVE WORKFLOW

OUT-OF-THE-BOX EVENT PACKS

Event Name	Event Description
Activities - Closed Not Locked	Returns all Activities that have been closed but have not been locked. (It is recommended that you schedule this event to run once per day.)
Activities - Closed Set Closed Date	Returns all Activities that have been closed but have no closed date. (It is recommended that you schedule this event to run once per day.)
Activities - Closed YTD	Returns all Activities that were closed the currentcalendar YTD. (It is recommended that you schedule this event to run either weekly or monthly.)
Activities - Created Last Month	Returns all Activities that were created the previous calendar month. (It is recommended that you schedule this event to run once per month.)
Activities - Closed Last Quarter	Returns all Activities that were created the previous calendar quarter. (It is recommended that you schedule this event to run once per quarter.)
Activities - Closed Last Quarter - Status Open	Returns all Activities that were created last quarter but have not yet been closed. (It is recommended that you schedule this event to run once per quarter.)
Activities - Created YTD	Returns all Activities that have been created YTD this calendar year. (It is recommended that you schedule this event to run either weekly or monthly.)
Activities - Filters - Country 'X'	'X' can be set to any value used for the top level Business Unit Rollup. This query will then return all Activities with the specified country. (It is recommended that you schedule this event to run either weekly or daily.)

Event Name	Event Description
Activities – Filters – Country ‘X’ – State ‘Y’	‘X’ can be set to any value used for the top level Business Unit Rollup. ‘Y’ can be set to any value used for the second level Business Unit Rollup. This query will then return all Activities with the specified country and state. (It is recommended that you schedule this event to run either weekly or daily.)
Activities – Filters – Country ‘X’ – State ‘Y’ – City ‘Z’	‘X’ can be set to any value used for the top level Business Unit Rollup. ‘Y’ can be set to any value used for the second level Business Unit Rollup. ‘Z’ can be set to any value used for the third level Business Unit Rollup. This query will then return all Activities with the specified country, state, and city. (It is recommended that you schedule this event to run either weekly or daily.)
Activities – Filters – Level 1 ‘X’	‘X’ can be set to any value used for the top level Call Category Rollup. This query will then return all Activities with the specified category. (It is recommended that you schedule this event to run either weekly or daily.)
Activities – Filters – Level 1 ‘X’ – Level 2 ‘Y’	‘X’ can be set to any value used for the top level Call Category Rollup. ‘Y’ can be set to any value used for the second level Call Category Rollup. This query will then return all Activities with the specified categories. (It is recommended that you schedule this event to run either weekly or daily.)
Activities – Filters – Level 1 ‘X’ – Level 2 ‘Y’ – Level 3 ‘Z’	‘X’ can be set to any value used for the top level Call Category Rollup. ‘Y’ can be set to any value used for the second level Call Category Rollup. ‘Z’ can be set to any value used for the third level Call Category Rollup. This query will then return all Activities with the specified categories. (It is recommended that you schedule this event to run either weekly or daily.)
Activities – Filters – Site ‘X’	‘X’ can be set to any value used for the top level Site Rollup. This query will then return all Activities with the specified site. (It is recommended that you schedule this event to run either weekly or daily.)

Event Name	Event Description
Activities – Filters – Site ‘X’ – Building ‘Y’	‘X’ can be set to any value used for the top level Site Rollup. ‘Y’ can be set to any value used for the second level Site Rollup. This query will then return all Activities with the specified sites. (It is recommended that you schedule this event to run either weekly or daily.)
Activities – Filters – Site ‘X’ – Building ‘Y’ – Location ‘Z’	‘X’ can be set to any value used for the top level Site Rollup. ‘Y’ can be set to any value used for the second level Site Rollup. ‘Z’ can be set to any value used for the third level Site Rollup. This query will then return all Activities with the specified sites. (It is recommended that you schedule this event to run either weekly or daily.)
Activities – Filters – Site ‘X’ – Building ‘Y’ – Location ‘Z’ – Section ‘A’	‘X’ can be set to any value used for the top level Site Rollup. ‘Y’ can be set to any value used for the second level Site Rollup. ‘Z’ can be set to any value used for the third level Site Rollup. ‘A’ can be set to any value used for the fourth level Site Rollup. This query will then return all Activities with the specified sites. (It is recommended that you schedule this event to run either weekly or daily.)
Activities – New Activity Created	Returns recently created Activities. (It is recommended that you schedule this event to run once per hour.)
Activities – Normalize Access Level to 1	Sets all Activities to be Access Level 1. (It is recommended that you schedule this event to run once per hour.)
Assignments/Activities – All Open Assigned To	Returns all Activity Assignments organized by Person Assigned To. (It is recommended that you schedule this event to run once per day.)
Assignments/Activities – Completed Last Month	Returns all Activities that were marked as Completed last calendar month. (It is recommended that you schedule this event to run once per month.)

Event Name	Event Description
Assignments/Activities - Completed Last Quarter	Returns all Activities that were marked as Completed last quarter. (It is recommended that you schedule this event to run once per quarter.)
Assignments/Activities - Completed YTD	Returns all Activities that were marked as Completed for the YTD of the calendar year. (It is recommended that you schedule this event to run either once per month or once per week.)
Assignments/Activities - Due In 'X' Days	'X' is the number of days until the due date. Returns all Activity Assignments due within a specified amount of days. (It is recommended that you schedule this event to run once per day.)
Assignments/Activities - Open 'X' Days	'X' is the number of days the Activity has been open. Returns all Activities that have been open for the specified amount of days or more. (It is recommended that you schedule this event to run once per day.)
Assignments/Activities - Past Due 'X' Days	'X' is the number of days past the due date. Returns all Activity Assignments that are past due over the specified amount of days. (It is recommended that you schedule this event to run once per day.)
Assignments/Activities - Type 'X'	'X' is the assignment type specified in the dropdown menu. Returns all Activity Assignments of the specified type. (It is recommended that you schedule this event to run either weekly or once per day.)

ADMIN

Event Name	Event Description
Admin -All Current Logged On Users	Returns all currently logged on users. (It is recommended that you schedule this event to run once per day or whenever you want to know who is currently logged on.)

Event Name	Event Description
Admin -All Users	Returns all users in the system. (It is recommended that you schedule this event to run once per year.)
Admin -All Users Role 'X'	'X' is the Role that is specified when a user is created. Returns all users that have that specified Role. (It is recommended that you schedule this event to run once per year.)
Admin -All Users Workgroup 'X'	'X' is the Workgroup that is specified when a user is created. Returns all users that have that specified Workgroup. (It is recommended that you schedule this event to run once per year.)
Admin -System Administrator Login	Returns all instances that an Admin account has been logged into. (It is recommended that you schedule this event to run once per day.)

ASSIGNMENTS

Event Name	Event Description
Assignments - Count by Assigned To	Returns the number of Assignments by Person Assigned To. (It is recommended that you schedule this event to run once per day.)
Incident/Assignment - Closed Incident - Open Assignment	Returns all open Assignments that are associated with an Incident that has been closed. (It is recommended that you schedule this event to run once per day.)

eINCIDENTS

Event Name	Event Description
eIncidents - Workgroup 'X' Status 'Y'	'X' is the Workgroup of the eIncident, and 'Y' is an open or closed Status. Returns all eIncidents with the specified Workgroup and Status. (It is recommended that you schedule this event to run either weekly or daily.)
eIncidents - Class of 'X'	'X' is the top level of the Class Rollup. Returns all eIncidents with the specified Class. (It is recommended that you schedule this event to run either weekly or daily.)
eIncidents - Class of 'X', Category 'Y'	'X' is the top level of the Class Rollup. 'Y' is the second level of the Class Rollup. Returns all eIncidents with the specified Class and Category. (It is recommended that you schedule this event to run either weekly or daily.)
eIncidents - Class of 'X', Category 'Y', Subcategory 'Z'	'X' is the top level of the Class Rollup. 'Y' is the second level of the Class Rollup. 'Z' is the third level of the Class Rollup. Returns all eIncidents with the specified Class, Category, and Subcategory. (It is recommended that you schedule this event to run either weekly or daily.)
eIncidents - Class of 'X', Category 'Y', Subcategory 'Z', Type 'A'	'X' is the top level of the Class Rollup. 'Y' is the second level of the Class Rollup. 'Z' is the third level of the Class Rollup. 'A' is the fourth level of the Class Rollup. Returns all eIncidents with the specified Class, Category, Subcategory, and Type. (It is recommended that you schedule this event to run either weekly or daily.)
eIncidents - New eIncident Last 'X' Hours	'X' is how far back you want to check. Returns any eIncident created in the last specified number of hours. (It is recommended that you schedule this event to run once per hour.)

Event Name	Event Description
elncidents - Normalize Access Level to 1	Sets the Access Level of all elncidents to 1. (It is recommended that you schedule this event to run once per hour.)
elncidents - Open Over 'X' Days	'X' is the number of days open. Returns all elncidents that have been open for the specified number of days. (It is recommended that you schedule this event to run once per day.)
elncidents - Site of 'X'	'X' is the top level of the Site Rollup. Returns all elncidents with the specified Site. (It is recommended that you schedule this event to run either weekly or daily.)
elncidents - Site of 'X', Building 'Y'	'X' is the top level of the Site Rollup. 'Y' is the second level of the Site Rollup. Returns all elncidents with the specified Site and Building. (It is recommended that you schedule this event to run either weekly or daily.)
elncidents - Site of 'X', Building 'Y', Location 'Z'	'X' is the top level of the Site Rollup. 'Y' is the second level of the Site Rollup. 'Z' is the third level of the Site Rollup. Returns all elncidents with the specified Site, Building, and Location. (It is recommended that you schedule this event to run either weekly or daily.)
elncidents - Site of 'X', Building 'Y', Location 'Z', Section 'A'	'X' is the top level of the Site Rollup. 'Y' is the second level of the Site Rollup. 'Z' is the third level of the Site Rollup. 'A' is the fourth level of the Site Rollup. Returns all elncidents with the specified Site, Building, Location, and Section. (It is recommended that you schedule this event to run either weekly or daily.)
elncidents - Statistics Report	Returns the count of all elncidents opened in the last 'X' number of days, months, quarters, and YTD. (It is recommended that you schedule this event to run once per week.)

INCIDENTS

Event Name	Event Description
Incident -Closed Incidents - Set 1 Year Expiry	Sets the expiry date to one year after the Incident was closed. (It is recommended that you schedule this event to run once per day.)
Incident -List - Access Level 'X'	'X' is the specified Access Level between 1 and 5. Returns all specified Incidents with the specified Access Level. (It is recommended that you schedule this event to run either weekly or daily.)
Incident - List - Closed Last Month	Returns all Incidents that were closed in the last calendar month. (It is recommended that you schedule this event to run once per month.)
Incident - List - Created in the Last 'X' Days	'X' is the number of days since an Incident was created. (It is recommended that you schedule this event to run either weekly or daily.)
Incident - List - Created Last Month	Returns all Incidents that were created in the last calendar month. (It is recommended that you schedule this event to run once per month.)
Incident - List - Created YTD	Returns all Incidents that were created in the last YTD. (It is recommended that you schedule this event to run once per month.)
Incident - List - Disposition 'X'	'X' is the Disposition. Returns all Incidents with the specified Disposition. (It is recommended that you schedule this event to run either weekly or daily.)
Incident - List - Due in 'X' Days	'X' is the number of days until the due date. Returns all Incidents within the specified time. (It is recommended that you schedule this event to run once per day.)

Event Name	Event Description
Incident - List - Flag of 'X'	'X' is the name of a Flag. Returns all Incidents with the specified Flag set to Yes. (It is recommended that you schedule this event to run either weekly or daily.)
Incident - List - Incidents Last Month By Site 'X'	'X' is the Site Rollup Level 1. Returns all Incidents with the specified Site created last calendar month. (It is recommended that you schedule this event to run once per month.)
Incident - List - No Activity in 'X' Days	'X' is the specified number of days. Returns all Incidents that have not been modified for the specified number of days and are still open. (It is recommended that you schedule this event to run once per day.)
Incident - List - No Assignments	Returns all Incidents that are open with no Assignments. (It is recommended that you schedule this event to run once per week.)
Incident - List - Not Access Level of 'X' - Status 'Y'	'X' is a specified Access Level between 1 and 5. 'Y' is the Status of Open or Close. Returns all Incidents that do not have the specified Access Level but do have the specified Status. (It is recommended that you schedule this event to run once per week.)
Incident - List - Open for More Than 'X' Days	'X' is the number of days that an Incident has been open for. Returns all Incidents that have been opened for or more the specified number of days. (It is recommended that you schedule this event to run once per day.)
Incident - List - Owner Role of 'X' - Status 'Y'	'X' is the specified Owner Role. 'Y' is the specified Status of Open or Close. Returns all Incidents with the specified Owner Role and Status. (It is recommended that you schedule this event to run either weekly or daily.)
Incident - List - Site of 'X' with Open Status	'X' is the specified Status. Returns all Incidents with the specified Site and Open Status. (It is recommended that you schedule this event to run once per week.)

Event Name	Event Description
Incident - List - Status 'X'	'X' is a Status of Open or Close. Returns all Incidents with the specified Status. (It is recommended that you schedule this event to run once per week.)
Incident - List - Workgroup 'X' - Status 'Y'	'X' is the specified Workgroup. 'Y' is the specified Status of Open or Close. Returns all Incidents with the specified Workgroup and Status. (It is recommended that you schedule this event to run either weekly or daily.)
Incident - Normalize Access Level to 1	Sets all Incidents to be Access Level 1. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - Access Level 'X'	'X' is a specified Access Level between 1 and 5. Returns one email per Incident with the specified Access Level. (It is recommended that you schedule this event to run once per day.)
Incident - Single - Blank Outcome with Status Closed	Returns one email per Incident that has a Close Status but no specified outcome. (It is recommended that you schedule this event to run once per week.)
Incident - Single - Business Unit Level 1 of 'X'	'X' is the top level of the Business Unit Rollup. Returns one email per Incident with the specified Business Unit. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - Business Unit Level 1 of 'X', Level 2 'Y'	'X' is the top level of the Business Unit Rollup. 'Y' is the second level of the Business Unit Rollup. Returns one email per Incident with the specified Business Unit. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - Business Unit Level 1 of 'X', Level 2 'Y', Level 3 'Z'	'X' is the top level of the Business Unit Rollup. 'Y' is the second level of the Business Unit Rollup. 'Z' is the third level of the Business Unit Rollup. Returns one email per Incident with the specified Business Unit. (It is recommended that you schedule this event to run once per hour.)

Event Name	Event Description
Incident - Single - Business Unit Level 1 of 'X', Level 2 'Y', Level 3 'Z', Level 4 'A'	'X' is the top level of the Business Unit Rollup. 'Y' is the second level of the Business Unit Rollup. 'Z' is the third level of the Business Unit Rollup. 'A' is the fourth level of the Business Unit Rollup. Returns one email per Incident with the specified Business Unit. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - Class of 'X'	'X' is the top level of the Class Rollup. Returns one email per Incident with the specified Class. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - Class of 'X', Category 'Y'	'X' is the top level of the Class Rollup. 'Y' is the second level of the Class Rollup. Returns one email per Incident with the specified Class and Category. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - Class of 'X', Category 'Y', Subcategory 'Z'	'X' is the top level of the Class Rollup. 'Y' is the second level of the Class Rollup. 'Z' is the third level of the Class Rollup. Returns one email per Incident with the specified Class, Category, and Subcategory. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - Due in 'X' Days	'X' is the number of days until the due date. Returns one email per Incident that is due within a specified amount of days. (It is recommended that you schedule this event to run once per day.)
Incident - Single - Flag of 'X'	'X' is the name of a Flag. Returns one email per Incident with the specified Flag set to Yes. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - Follow-up Required in 'X' Days	'X' is the number of days until a follow-up is required. Returns one email per Incident where the follow-up date occurs within the specified number of days. (It is recommended that you schedule this event to run once per day.)

Event Name	Event Description
Incident - Single - Involved Person with Flag of 'X'	'X' is the name of a flag that can be applied to a person. Returns one email per Incident where the Involved Person has the specified Flag.(It is recommended that you schedule this event to run once per hour.)
Incident - Single - New Incident	Returns one email per new Incident. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - No Activity in 'X' Days	'X' is the number of days since the Incident was last modified. Returns one email per Incident where the Incident has not been modified in the specified or more number of days and is open. (It is recommended that you schedule this event to run once per day.)
Incident - Single - Owner Role of 'X' - Status 'Y'	'X' is the Owner Role. 'Y' is the Status of Open or Close. Returns one email per Incident where the Incident has the specified Owner Role and has the specified Status. (It is recommended that you schedule this event to run once per day.)
Incident - Single - Re-opened after Close	Returns one email per Incident where the Incident has been re-opened after being closed. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - Review Type of 'X'	'X' is a type of review. Returns one email per Incident that has the specified Review Type. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - Site 'X'	'X' is the top level of the Site Rollup. Returns one email per Incident that has the specified Site. (It is recommended that you schedule this event to run once per hour.)
Incident - Single - Site 'X' - Building 'Y'	'X' is the top level of the Site Rollup. 'Y' is the second level of the Site Rollup. Returns one email per Incident that has the specified Site and Building. (It is recommended that you schedule this event to run once per hour.)

Event Name	Event Description
Incident -Single - Site 'X' - Building 'Y', Location 'Z'	'X' is the top level of the Site Rollup. 'Y' is the second level of the Site Rollup. 'Z' is the third level of the Site Rollup. Returns one email per Incident that has the specified Site, Building, and Location. (It is recommended that you schedule this event to run once per hour.)
Incident -Single - Site 'X' - Building 'Y' - Location 'Z' - Section 'A'	'X' is the top level of the Site Rollup. 'Y' is the second level of the Site Rollup. 'Z' is the third level of the Site Rollup. 'A' is the fourth level of the Site Rollup. Returns one email per Incident that has the specified Site, Building, Location, and Section. (It is recommended that you schedule this event to run once per hour.)

INVESTIGATIONS & CASES

Event Name	Event Description
Case - Access Level of 'X'	'X' is the Access Level between 1 and 5. Returns all Cases with the specified Access Level. (It is recommended that you schedule this event to run once per day.)
Case - Access Level of 'X' Status 'Y'	'X' is the Access Level between 1 and 5. 'Y' is the specified status of Open or Closed. Returns all Cases with the specified Access Level and Status. (It is recommended that you schedule this event to run once per day.)
Case - Case Closed, Incident Open	Returns all Cases that have been closed butthat are associated with an open Incident. (It is recommended that you schedule this event to run once per day.)
Case - Category 'X'	'X' is the top level Category. Returns all Cases with the specified category. (It is recommended that you schedule this event to run once per day.)

Event Name	Event Description
Case - Count by Case Manager	Returns the total number of Cases currently open and organized by manager. (It is recommended that you schedule this event to run once per day.)
Case - Created in Last 'X' Days	'X' is the number of days back to check. Returns all Cases created in the specified number of days. (It is recommended that you schedule this event to run once per week.)
Case - Disposition 'X'	'X' is the Disposition. Returns all Cases with the specified Disposition. (It is recommended that you schedule this event to run once per day.)
Case - Disposition 'X' Status 'Y'	'X' is the Disposition. 'Y' is the Status of open or closed. Returns all Cases with the specified Disposition and Status. (It is recommended that you schedule this event to run once per day.)
Case - List Status 'X'	'X' is the Status of open or closed. Returns all Cases with the specified Status. (It is recommended that you schedule this event to run once per week.)
Case - New Case Created	Returns all newly created Cases. (It is recommended that you schedule this event to run once per hour.)
Case - Normalized Access Level to 1	Sets all Cases to be Access Level 1. (It is recommended that you schedule this event to run once per hour.)
Case - Open for at Least 'X' Days	'X' is the specified number of days. Returns all Cases that have been open for or greater than the specified number of days. (It is recommended that you schedule this event to run once per day.)
Case - Review of 'X'	'X' is a type of review. Returns all Cases with the specified type of review. (It is recommended that you schedule this event to run once per day.)

Event Name	Event Description
Case - Workgroup 'X'	'X' is a Workgroup. Returns all Cases with the specified Workgroup. (It is recommended that you schedule this event to run once per day.)
Incident - List - Investigation Closed Last Month	Returns all Investigations closed the last calendar month. (It is recommended that you schedule this event to run once per month.)
Incident - List - No Investigator Assigned	Returns all Incidents that are open with no Investigator assigned. (It is recommended that you schedule this event to run once per week.)
Incident - Single - New Investigation by Site 'X'	'X' is the top level of the Site Rollup. Returns one email per Incident where the Incident has the specified Site. (It is recommended that you schedule this event to run once per hour.)

ITEMS

Event Name	Event Description
Items - Normalize Access Level to 1	Sets all Items to be Access Level 1. (It is recommended that you schedule this event to run once per hour.)

ORGANIZATIONS

Event Name	Event Description
Organizations - Normalize Access Level to 1	Sets all Organizations to be Access Level 1. (It is recommended that you schedule this event to run once per hour.)

PERSONS

Event Name	Event Description
Person - BOLO	Returns all Persons that have an active Trespass. (It is recommended that you schedule this event to run once per day.)
Person - Normalize Access Level to 1	Sets all Persons to be Access Level 1. (It is recommended that you schedule this event to run once per hour.)

VEHICLES

Event Name	Event Description
Vehicles - Normalize Access Level to 1	Sets all Vehicles to be Access Level 1. (It is recommended that you schedule this event to run once per hour.)

Want to learn more? *Let's talk.*

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