Perspective™

by PPM

USER'S TRAINING GUIDE

Perspective by PPM™

Version 4.6

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Contents

Welcome to Perspective by PPM 2000

Welcome to Perspective by PPM 2000™, the industry leader in Incident Reporting and Investigation Management software. In addition to Perspective's core functionality, this guide also covers Perspective's Dispatching, Activity Tracking, Incident Reporting, and Investigation Management.

Perspective is available in the following four editions:

- **AIR**: Activity & Incident Reporting Software
- **SOC**: Security Operations Center Software
- **ICM**: Investigation & Case Management Software
- **EIM**: Enterprise Incident Management Software

These four Perspective editions offer just the right level of functionality for your specific incident management needs.

Throughout this guide, variances in feature and functionality between the four editions are specifically identified. All screenshots reflect the EIM version of Perspective. Your Perspective system may not look identical to the sample system described in this guide. Your system may be customized with field labels, lookup list options, and user defined fields that are unique to your organization.

Note: Dispatching is only available in the SOC and EIM editions of Perspective. Investigation Management is only available in the ICM and EIM editions of Perspective.

Accessing Perspective

Please refer to Figure 1.1 and Figure 1.2 for an example of the following steps.

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

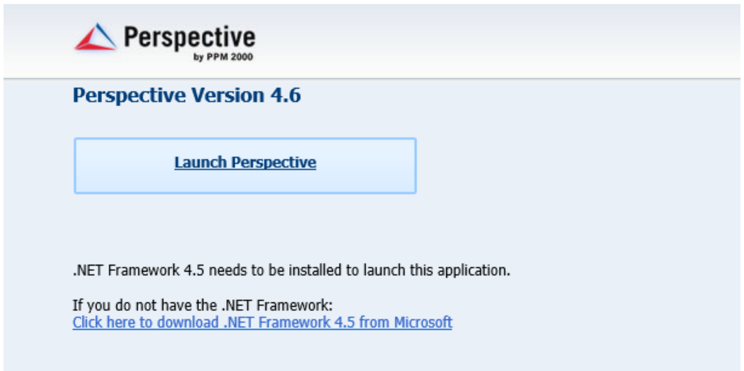

Figure 1.1: Launch Perspective

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

   - Once connected, a Logon window will appear.

3. Enter the **User Name** and **Password** assigned to you by your Administrator.

   Note: If your system uses Windows® authentication, the login will be performed automatically.

4. Click the **Logon** button.

Figure 1.2: Logon window, where you enter your user name and password

To create a desktop shortcut:

1. Enter your Perspective URL into your internet browser.
2. Right-click anywhere on the **Launch Perspective** screen and select **Create Shortcut**.
3. Confirm Request.

Navigating the Perspective Interface

Perspective's user interface is broken down into four main components (Figure 1.3 and Table 1.1):

1. **Ribbon**: Encompasses the most frequently used general administration, navigation, help, and search tools. The content displayed is interactive and completely dependent upon the current selection made within the Navigation pane.
2. **Navigation pane**: Consists of two major components: the bottom; which allows you to navigate through different Perspective components including the Dashboard, DispatchLog, Analysis Expert, Reports, etc., and the top; which displays the component-dependent options.
3. **Main Screen (Viewing pane)**: Varies depending on the Perspective component selected.
4. **Status bar**: Contains your system and login information, including your username, role, and your current Perspective's system and connection status (i.e., Connected/ Disconnected).

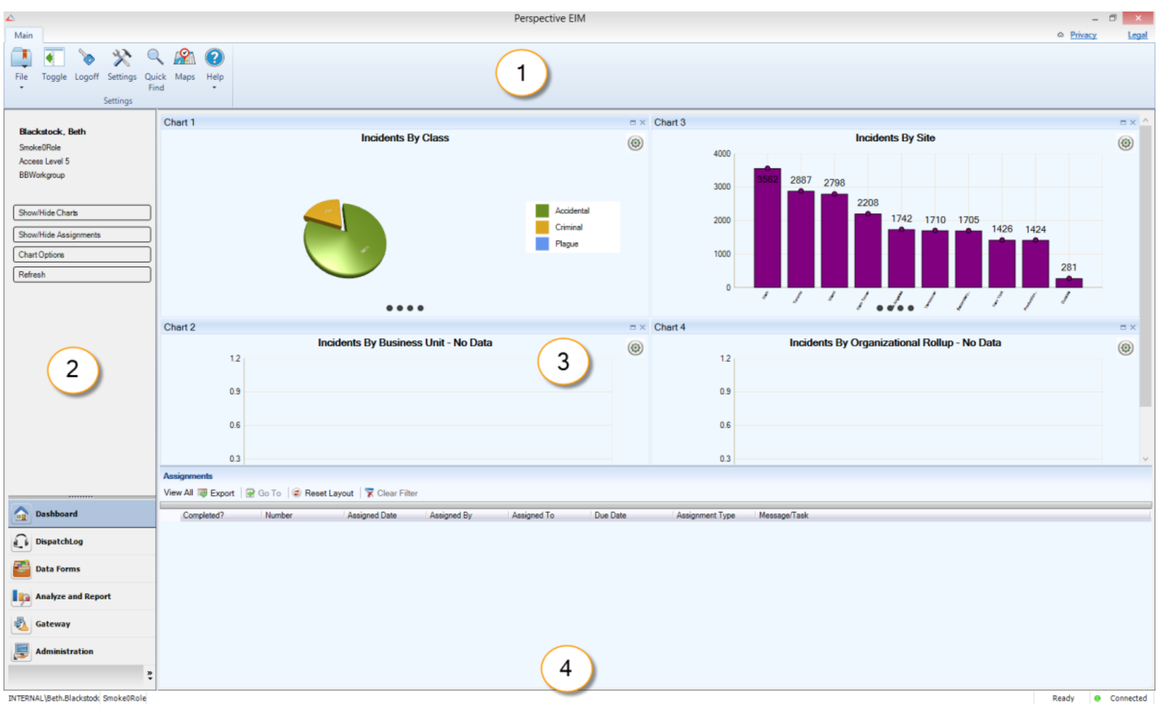

Figure 1.3: Perspective's user interface

Ribbon

The Ribbon is an interactive component of Perspective. Depending on the component open, there may be additional icons that accompany the following six static icons.

Ribbon Elements

File	Allows you to manage your account password and completely exit Perspective to ensure that your User License is released.
Toggle	Allows you to hide or display the Navigation pane.
Logoff	Allows you to log off Perspective without exiting the program. Logging off this way will still ensure your user license is released.
Settings	Allows you to determine how frequently your Dashboard is automatically refreshed. You can also view and/or edit your shortcut keys from Settings.
Quick Find	Allows you to search all text fields in Perspective (including summaries, narratives, names, and text attachments).
Maps	Allows you to see where Activities, Incidents, and Dispatches have occurred, or are occurring.
Help	Provides access to the User and Administration Help Files.

Table 1.1: Perspective's Ribbon

Use Help to Find the Information You Need

Whether you are learning how to use Perspective or looking for information on a specific topic, Perspective Help will explain how to use program features, identify windows and fields, and answer common questions. Perspective Help provides several search options to assist you in finding the specific information you are looking for.

Note: Your organization may have added custom content to the following area.

- To open one of the available Help files, click the **Help** icon located on the Ribbon. Click on **User Help** to access general Help files (Figure 1.4). Select **Admin Help** to access Administrator-specific Help files (requires appropriate permissions).
- You may also access the Client Site by clicking Go to Client Site from the Help menu.

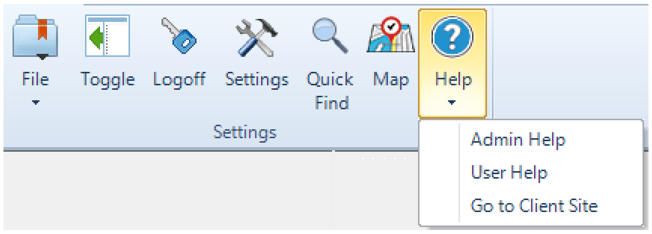

Figure 1.4: Accessing Help from the Ribbon

- To navigate through the Help file, click the **Contents** button in the upper left corner, the blue Hyperlinks in the upper right corner, or enter a search term in the **Search** field, also found in the upper right corner.
- In the Help screens, look for words that are Hyperlink Blue; these link to other topics with related information.

Contents Tab: Browse Help by Topic

1. Click a **book** icon to open it, and view the chapters and pages contained within (Figure 1.5).
2. Then click a **page** icon to fill the Viewing pane with information on the selected subject.

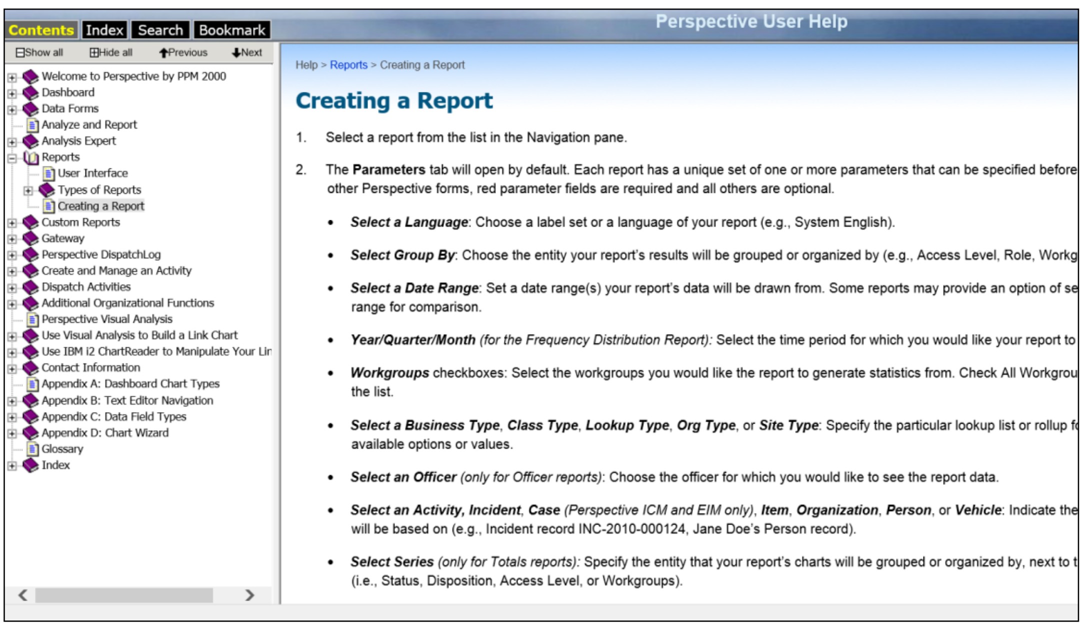

Figure 1.5: Browsing Help by topic

Index Tab: Browse Help by Index

1. Scroll through the listed keywords, or type a keyword to reference specific headings (Figure 1.6).

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

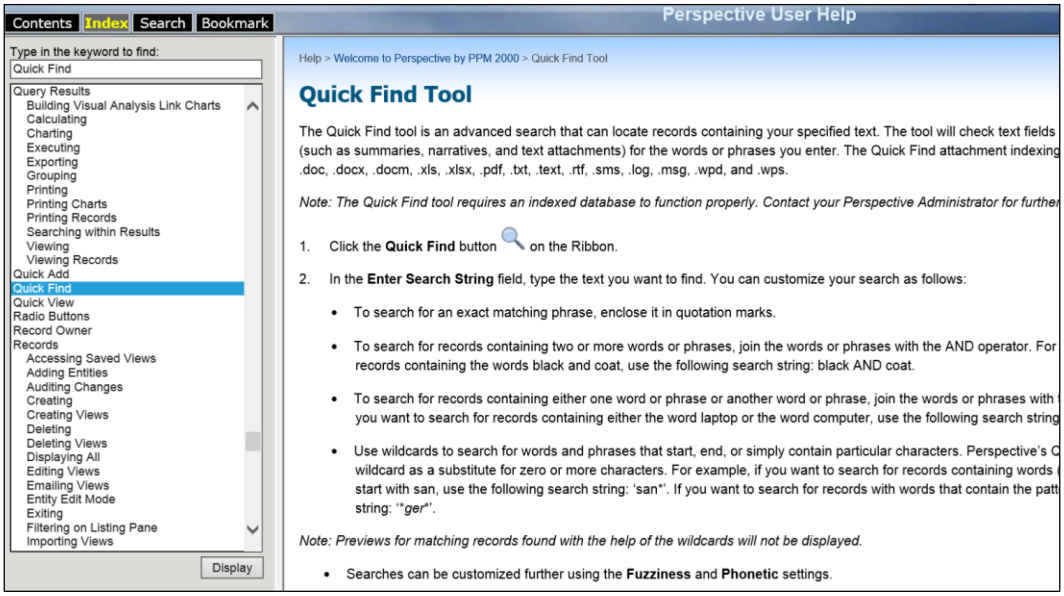

Figure 1.6: Browsing Help by Index

Search Tab: Search Help

1. Type a word or phrase in the **Type in the word(s) to search for** field, found in the upper left corner.

2. Click the **Go** button.

   - Perspective Help will list the topics containing the word or phrase.

3. Click the topic you want to display.

   - The topic will appear in the Viewing pane with the searched word or phrase highlighted.

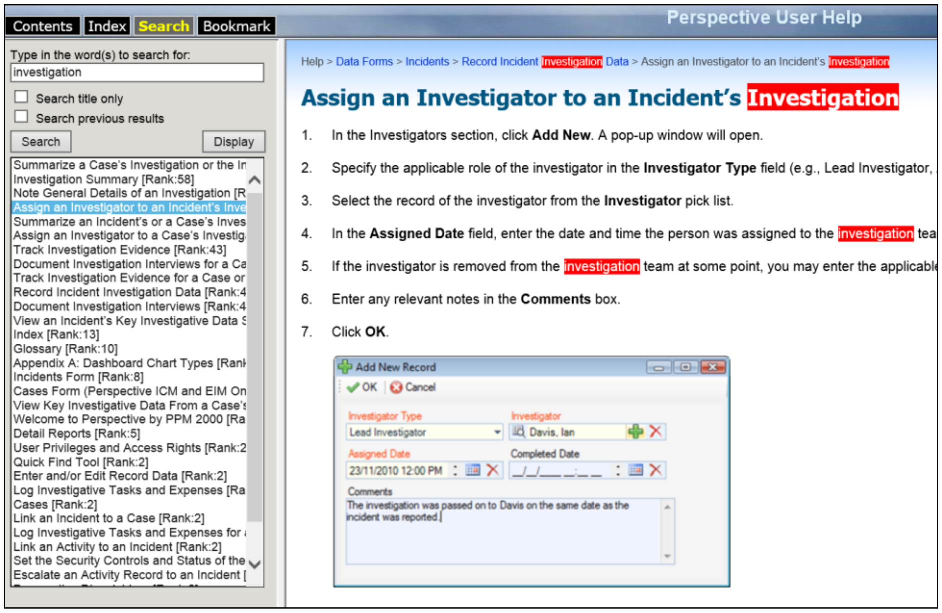

Figure 1.7: Using Help to find and highlight searched words

Main System Components

You can access all of Perspective's components and corresponding functionalities from the Navigation pane. Just click on the buttons to switch between components, and then further explore each component by clicking on the options displayed (Table 1.2).

Components

Dashboard	Dashboard is Perspective's opening screen. Use it to track ongoing projects in the Assignments section, and to quickly review selected records' trends and statistics in the Charts area.
DispatchLog	Opens a separate Dispatching window that assists in centralized dispatching of officers and organizations. Please consult the *Perspective Dispatching* section in the Perspective User Guide for a complete description of dispatching procedures.
Data Forms	Enter, update and review your Activity, Incident, Case (Perspective ICM and EIM only), Item, Person, Organization, and Vehicle records in Data Forms.
Analyze and Report	Reports: Choose from a number of pre-set reports to generate statistics and analyze trends in your data. Analysis Expert: Use Analysis Expert to query records for specific data, and then turn your results into a printed grid, spreadsheet, chart, or report. Custom Reports: Allows for the building creation of reports, or report templates with user defined layout and content specifications.
Gateway	Gateway serves as an inbox for all electronically submitted reports. Selected users assess each report before accepting it into Perspective or deleting it from the system.
Administration	Designated Administrators use this component to manage system settings, workgroups, roles, users, officers, auditing, languages, some components of the system interface, and visual alerts. The functions of the Administration component are described in the *Perspective Administrator's Guide*

Table 1.2: Perspective's seven main system components

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

Dashboard

The Dashboard is Perspective's default screen. Like the dashboard of an automobile with its various gauges and indicator lights, Perspective's Dashboard keeps users informed about what is happening in their organization and alerts them of important changes. It helps to track ongoing projects and tasks, and includes a statistics snapshot section for the incidents the user has access to.

Navigating the Dashboard Interface

The two elements of the Dashboard are Assignments and Charts (Figure 2.1).

1. **Charts**: Get a quick overview of incident trends and statistics with the help of up to four customizable bar or pie charts.

2. **Assignments**: Track work assigned to you, as well as those you have assigned to others, from start to finish.

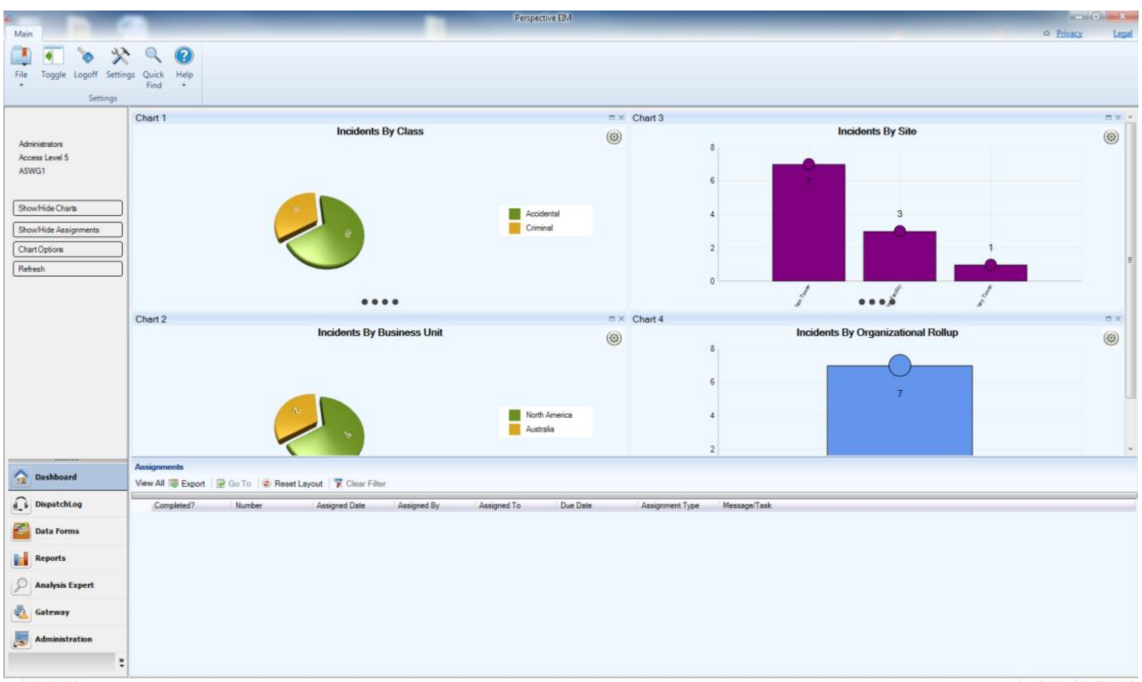

Figure 2.1: Assignments and Charts, which you can view from your Dashboard

- Resize the individual panes by dragging the borders surrounding them.

- To display/hide one of the Dashboard elements, click **Show/Hide Charts** or **Show/Hide Assignments** on the Navigation pane.

- To refresh the view of the Dashboard, click the **Refresh** button on the Navigation pane.

Charts

The four preset charts on the Dashboard give you a quick overview of trends found in the Perspective database records you have access to. To select the combination of up to four charts for display on the Dashboard, follow the steps described below (Figure 2.2).

1. Click the **Chart Options** button on the Navigation pane.

2. In the Chart Settings window, click the **ON/OFF** switch to display or hide any one of the chart sections.

3. Within the relevant chart field (e.g., Chart 1), choose the chart you would like to appear in the selected chart section (e.g., Incident by Class).

4. Depending on the chart specified, a number of further settings will be displayed, which may (or may not) include the following:

   - **From Last**: Select the time period for which you would like to see the statistics on the chart (e.g., 365 days).

   - **Top**: Specify the number of categories you would like to display on your chart (e.g., top 10 classes).

   - **Call Category:** Restrict your data to a specific Call Category, making it as narrow as necessary. Click the **plus** icon next to the Call Category field and select the required number of levels of category by which you would like to restrict the data in the chart.

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

   - **Site:** Restrict your data to a specific Site, making it as detailed as necessary. Click the **plus** icon next to the Site field and select the required number of site levels (i.e., Site/Building/Location/Section) by which you would like to restrict the data in the chart.

   - **Category ID:** Restrict the Case data in your chart to either Internal or External cases.

   - **Year**: Select the specific year you want to display your data for (e.g., 2011).

   - **Chart Type**: Choose either the pie or the bar chart type.

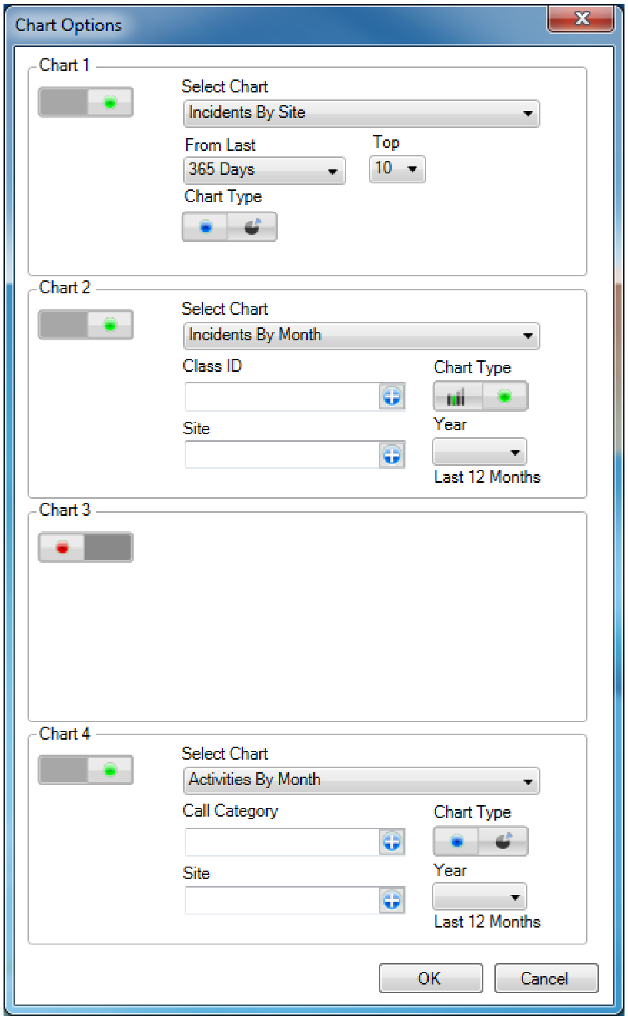

Figure 2.2: Modify your chart options

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

6. At any time, you may change the chart options for each individual chart displayed on the Dashboard by clicking the corresponding **Settings** icon .

   - This will open the options window for the chart that you choose to modify.

7. Examine one particular chart in detail by clicking the **Maximize** icon in the upper right corner of the relevant chart section.

   - To dock it back together with the rest of the charts, click the equivalent **Minimize** icon .

8. If the chart you selected is either a uni-colored bar chart or a pie chart, you may be able to further explore the information contained in the chart. By clicking on a bar or a pie sector that corresponds to a specific category, class, organization, or site, you may expand the data that is hierarchically subordinate to the data currently displayed on the screen.

9. Click on the small dots below the chart to navigate back through the data (Figure 2.3).

Figure 2.3: Navigate your charts by clicking the small dots underneath each chart

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

Assignments

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

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

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

You may perform the following assignment-related tasks directly from your Dashboard:

- To add an assignment to your email application’s calendar, select the assignment and click **Export** . A window will open allowing you to schedule the assignment using external applications.
- To open an assignment’s corresponding Activity, Incident, or Case record, double-click the assignment record, or highlight the assignment and click **Go To** . Perspective will leave the Dashboard and advance to the applicable record in the Data Forms.
- Once the assignment has been completed, highlight the assignment on the Dashboard, then right-click and select **Mark Completed**. A pop-up window will appear asking if you would like to send the Assigned By person an email notifying them of the assignment’s completion. Click **Yes** or **No**.
- By default, only incomplete assignments will appear in the Assignments section of the Dashboard. To display all assignments, completed and incomplete, click **View All**. Click **View All** again to hide completed assignments.

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

- To re-order the grid columns in the Assignments section, drag the column headings to the desired location. Drop them into place once the indicator arrows have appeared pointing to the correct spot. To reset the order of columns to their default position, click **Reset Layout** .
- To sort assignments by a particular column (e.g., Incident Number, Assignment Type, Due Date), click the column heading once. Click the heading again to sort the data in reverse order. Click **Clear Filter** to return to the unsorted view.
- To group assignments by Assigned Date, Assigned By and Assigned To persons, Due Date, Assignment Type, or to group complete and incomplete assignments separately, click the thick vertical bar located at the top of the Assignments grid and drag the relevant column heading to the **Group By** area. In our example, assignments have been grouped by their status as either “complete” (True) or “incomplete” (False). If necessary, you may build up on internal grouping by dragging additional headings to the blue field and arranging them in the required hierarchy. For instance, you may group the complete and the incomplete assignments by Assigned By persons, and so on. Click **Clear Filter** to return to the default view (Figure 2.4).

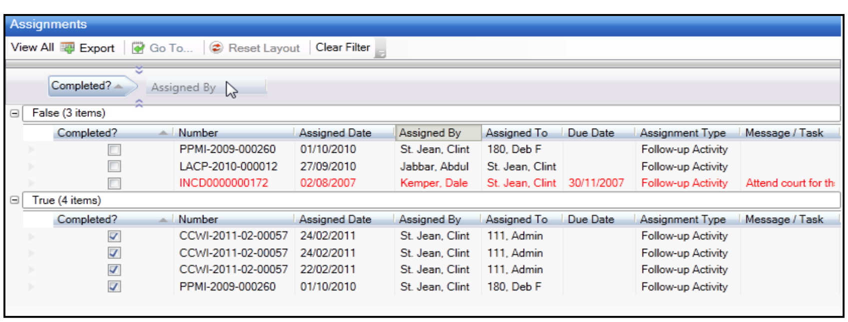

Figure 2.4: Grouping assignments by “complete” (True) and “incomplete” (False)

Data Forms

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

Navigating the Data Forms Interface

The Data Forms interface is divided into the three sections: Navigation pane, Listing pane, and Viewing pane (Figure 3.1).

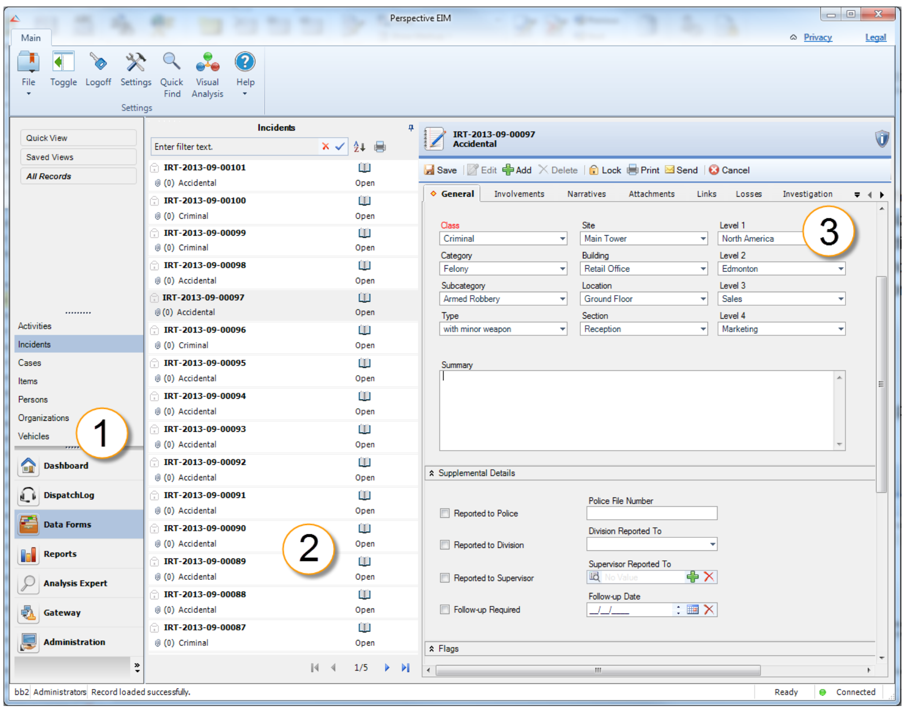

Figure 3.1: Incidents interface

1. **Navigation pane**: Allows you to move between the various data forms (e.g., Activities, Incidents, Items) at any time.

2. **Listing pane**: Provides a list of records that are available for viewing.

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

Enter And/Or Edit Record Data

Depending on the data form that is currently open and on your user privileges, a variety of buttons are available on the Viewing pane toolbar, allowing you to perform a number of record functions.

Data Forms Buttons

Save	Preserves the changes made to a record.
Edit	Switches a record into the edit mode. After clicking **Edit**, select the field you want to edit, and make the necessary change.
Add	Creates a new record from scratch.
Delete	Removes an entire record from the database.
Lock	Bars a record from editing.
Unlock	Makes a record available for editing. (This button will only appear if the record is currently locked.)
Print	After clicking **Print**, specify which type of the report you would like to print. On the Report Visibility form, specify which record sections you would like included in the report and whether you want to download attachments, and then click **OK**. Report options include: open as a PDF (where you can then print), send the report as an attachment in an email, or save the report as a PDF.
Send (Activity, Incident, and Case forms only)	Emails record details. After clicking **Send**, a new email window will open with general record details included in the body of the message. Specify the user or email address you would like the message to be delivered to, review the message details, and click **Send**.
Merge (Items, Persons, Organizations, and Vehicles forms only)	Merges partially duplicate records that correspond to a single physical referent that is an item, a person, an organization, or a vehicle. The function is represented by the Merge Items, Merge Persons, Merge Organizations, and Merge Vehicles buttons on the respective Viewing pane toolbars.

Table 3.1: Available buttons when in the Data Forms component of Perspective

	Cancel	Switches the record from the edit to the read-only mode without saving changes.
	Audit	To find out who created the record (Created By) and who last modified it (Last Modified), click the record's top shield icon.

Table 3.1: Available buttons when in the Data Forms component of Perspective (*continued*)

Creating a New Record

1. Select the appropriate data form type by clicking the corresponding banner located in the bottom part of the Navigation pane. You will have up to seven data forms to choose from.

Perspective's Seven Data Forms

Activities	Use this form to create records of routine Activities, or to manage activities imported from Dispatching.
Incidents	Use this form to record the details of an Incident, and to track the progress of its investigation.
Cases (Perspective ICM and EIM only)	Use this form to compile multiple Incidents with a common trait, track the progress of its Investigation, and access information on its Linked Incidents.
Items	Use this form to record the details of an Item, and to create a general record that will be used in the future.
Persons	Use this form to record the details of a Person, and to create a general record that will be used in the future.
Organizations	Use this form to record the details of an Organization, and to create a general record that will be used in the future.
Vehicles	Use this form to record the details of a Vehicle, and to create a general record that will be used in the future.

Table 3.2: Information about each of Perspective's seven Data Forms

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

3. Input desired information.

   Note: In a new data form, fields with red titles are required to be completed. If you save the record before completing all required fields, the system will display a system message requiring completion of these fields.

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

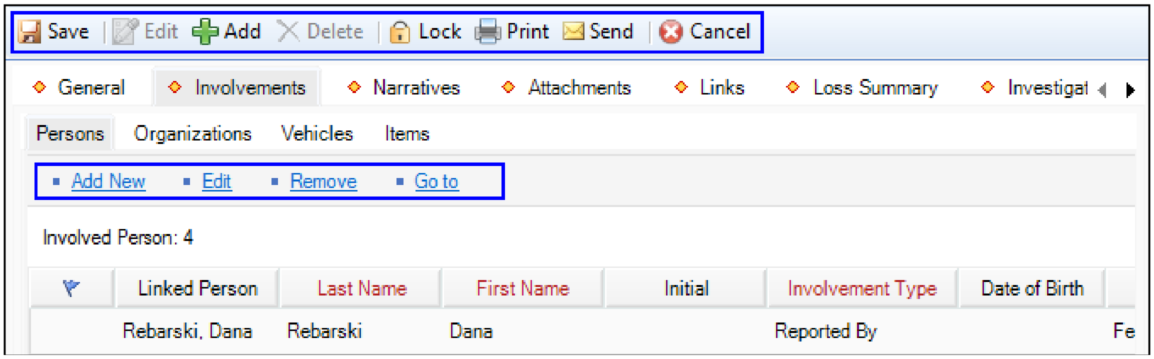

Figure 3.2: Creating a new record

Some additional tools you may encounter as you complete your record are the following:

Data Forms Tools

Edit	Opens a pop-up form that contains the data of the entity. Make necessary changes to the fields (or plain text) in the form, and click **OK** to return to the main record.
Add New	Creates a new entity within a record (e.g., a new Involved Person entity).
Remove	Removes an entity within a record (e.g., an invalid Involved Person entity).
Go To	Opens an entity's corresponding record, typically, in a different data form component. For example, going to the Involved Person entity involves opening the associated editable Person record in the Persons data form of Perspective. To return to the original data form (i.e., Incidents), simply select the required component from the Navigation pane. The views of both forms will be preserved.
Read/View	The Read/View functions are similar to the Go To function, with the only difference being that they open the entity in a read-only mode, where you may be able to zoom its contents, and/or print it, but not edit it. View allows an attachment to be saved to your computer, or to be opened and viewed in an appropriate application (i.e., an attached .doc file would open in Microsoft Word). You may scroll through the other entities of the same type (e.g., narratives, investigation summaries), without leaving the pop-up window, using the Previous and Next buttons.

Table 3.3: Available tools when in the Data Forms component of Perspective

Seal/Unseal	Removes/restores editing and deleting rights from/for an entity. *Note: Once you seal an entity, and then save and leave the corresponding record, it can never be unsealed. A new entity must be created in order to record changes to the original one. Even if an entity is left unsealed, the Author is the only user authorized to edit the entity, unless special privileges have been granted to another user to do so. (If this button is not visible to you, your Administrator has not granted you the right to seal entities.)*
History (Cases Involvements—Items, Persons, Organizations, and Vehicles sub-tabs only)	To see the history of incidents in which a particular case-involved person, organization, vehicle, or item has been involved, select the entity of interest in the grid, and click **History**. A new window will appear that displays a table of the entity's involvement in the incidents stored in your organization's Perspective database.

Table 3.3: Available tools when in the Data Forms component of Perspective (*continued*)

Create a New Incident Record

Note: Your organization's data forms may contain additional fields, so-called User Defined Fields. Usually, they appear under a separate like-named section. These fields will require entering additional pieces of information that may not be covered in this guide. You may also find that some of these fields have been customized for your organization.

General Tab

Please refer to Figure 3.3 for an example of the following steps.

1. Click the **Add** button  in the Viewing pane toolbar.
2. Perspective will automatically assign an **Incident Number** when the record is saved.
   - The **e-Incident Number** field is reserved for electronic reports that have been accepted from the Gateway into Perspective.
3. If applicable, input a file or reference number under **File Number**.
4. Indicate when the incident was reported under **Reported Date/Time**.
5. Note when the incident began under **Occurred From Date/Time** and when the incident ended under **Occurred To Date/Time**.
   - The **Incident Duration** will automatically be calculated when the record is saved.
6. Identify the incident's classification using the **Class**, **Category**, **Subcategory**, and **Type** lookup lists.

- These fields are hierarchical, meaning that the option selected in the first field (i.e., Class) determines the options that are available in the second field (i.e., Category), and so on. The options that appear in these lists have been customized by your organization.

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

   - Like the fields in the incident's classification section, these fields are hierarchical.

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

9. Type a brief overview of the incident in the **Summary** box.

   - To enter a more detailed description of the incident, outline the sequence of events under the Narratives tab.

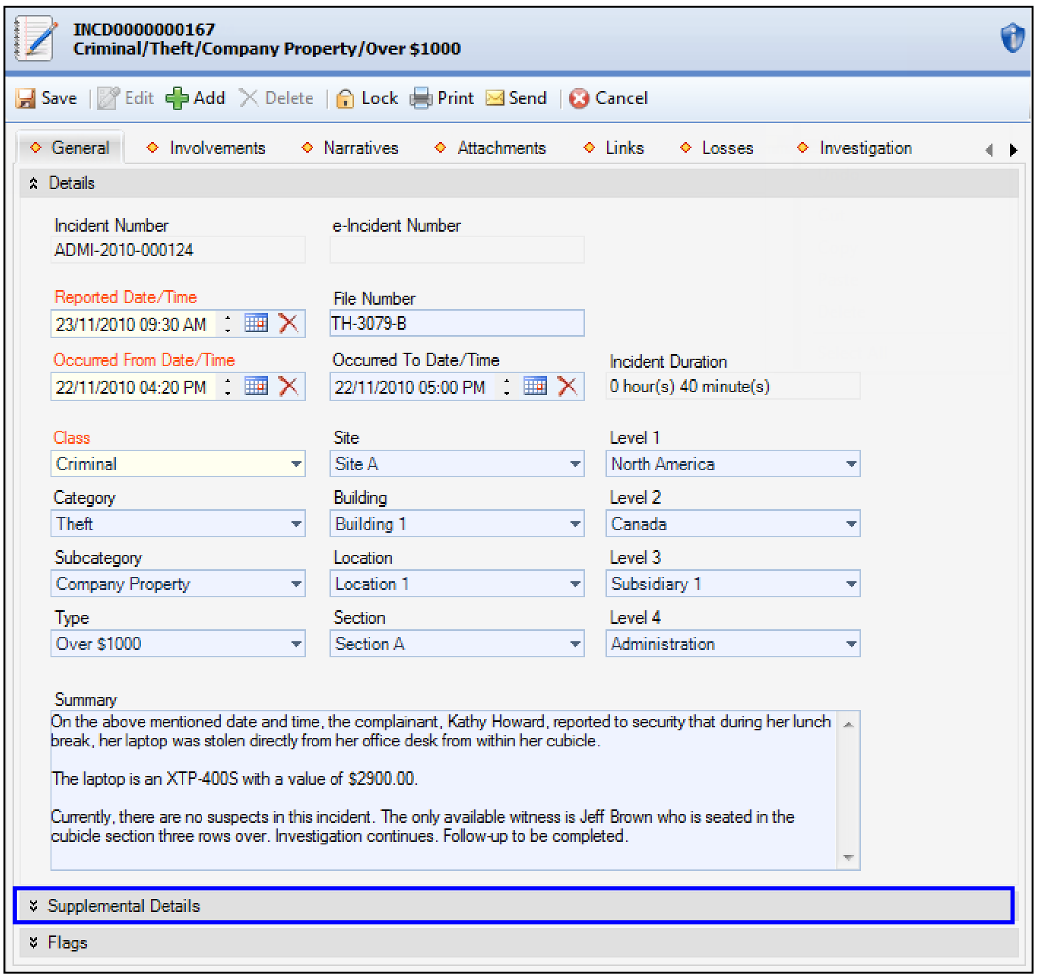

Figure 3.3: The first steps of creating an Incident

Indicate Which Authorities Have Been Notified of the Incident

Please refer to Figure 3.4 for an example of the following steps.

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

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

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

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

   Note: This is an information only text box; you will not receive any notification once this date has passed.

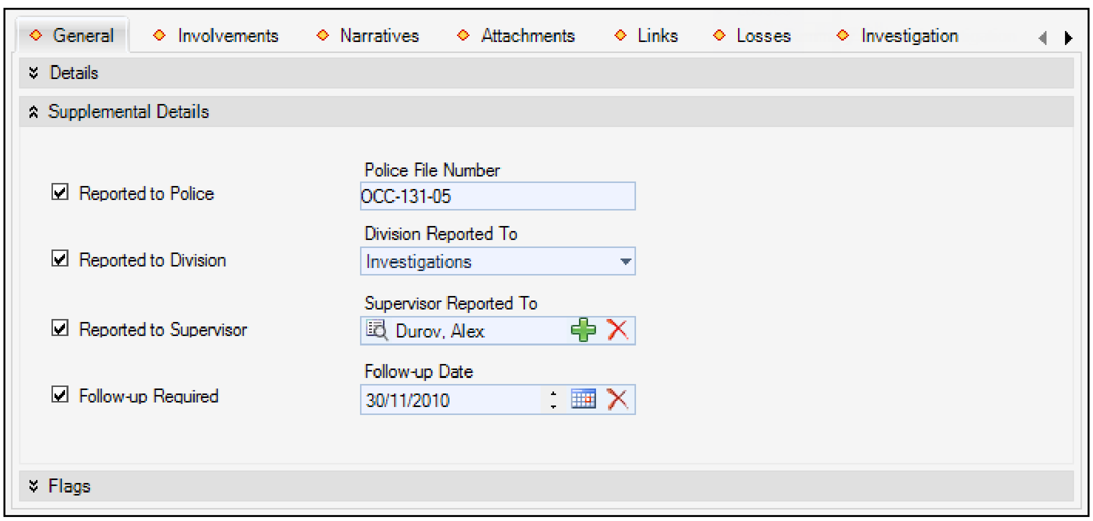

Figure 3.4: Identifying authorities that have been notified

Flag the Incident

1. In the Flags section, alter any applicable flag's **Status** (i.e., Yes, No, or Unknown).

   Note: When you change a flag's status to No, a No flag will be applied to the record. Leave the status as Unknown if you want the Incident to remain unflagged (Figure 3.5).

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

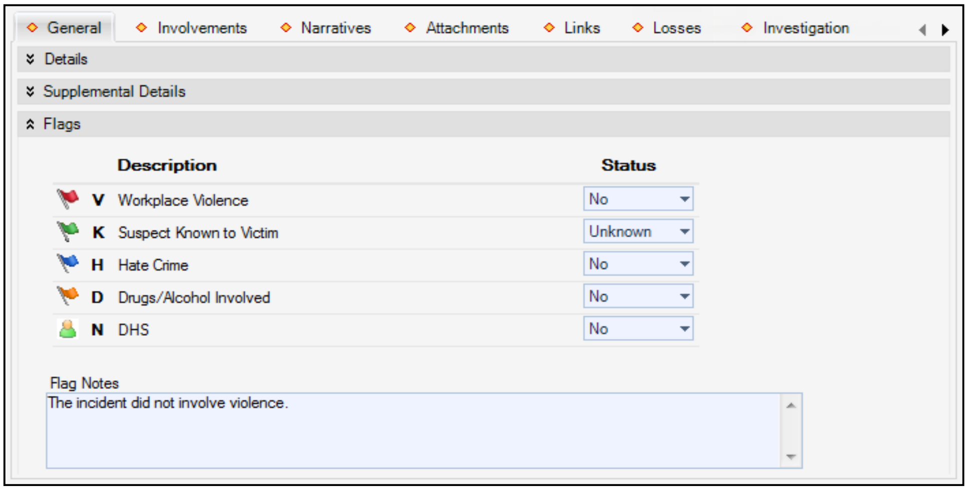

Figure 3.5: Flagging options

Involvements Tab

Identify Involved Persons

Please refer to Figure 3.6 for an example of the following steps.

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

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

3. Select the involved person's record from the **Linked Person** pick list by clicking on the icon.

   - If a Person record does not already exist for this individual, use the Quick Add function to create one.

   - The **First Name** and **Last Name** fields in the Details section will automatically populate with the Linked Person's name, along with any other details (e.g., photo) that were on the record.

     Note: Any modifications in the Details section will only apply to the Incident record and will not update the Person's data form. This must be done separately.

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

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

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

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

8. To add or change a photo of the involved person to the record, click the Add icon in the image box.

9. Locate the image file in the browser window

10. Click **Open**.

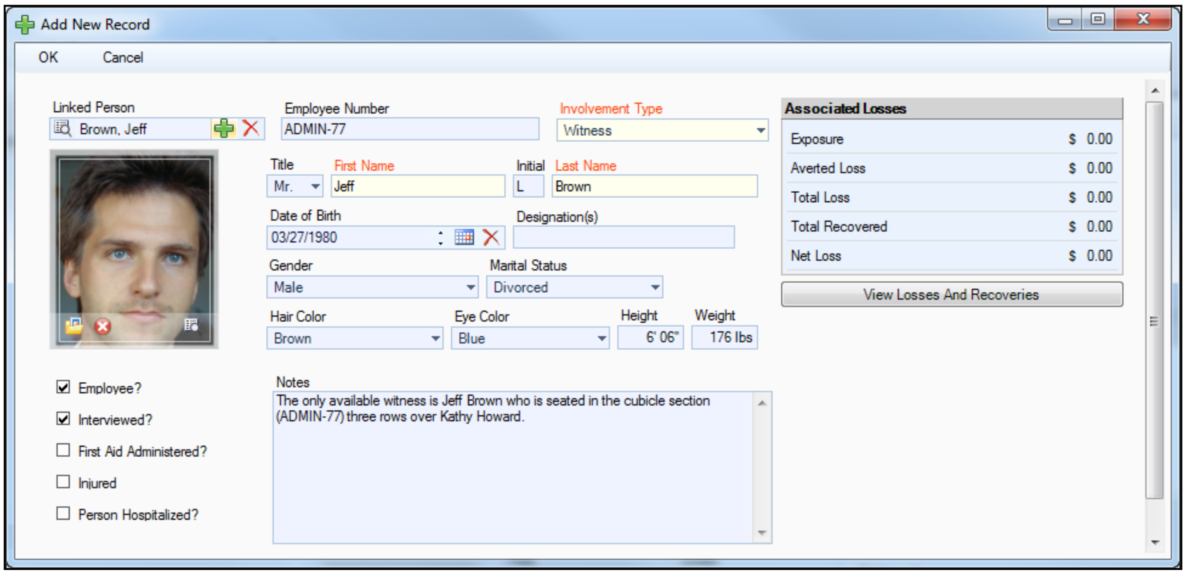

Figure 3.6: Creating an Involved Person

Add the Involved Person's Clothing Details

Please refer to Figure 3.7 for an example of the following steps.

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

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

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

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

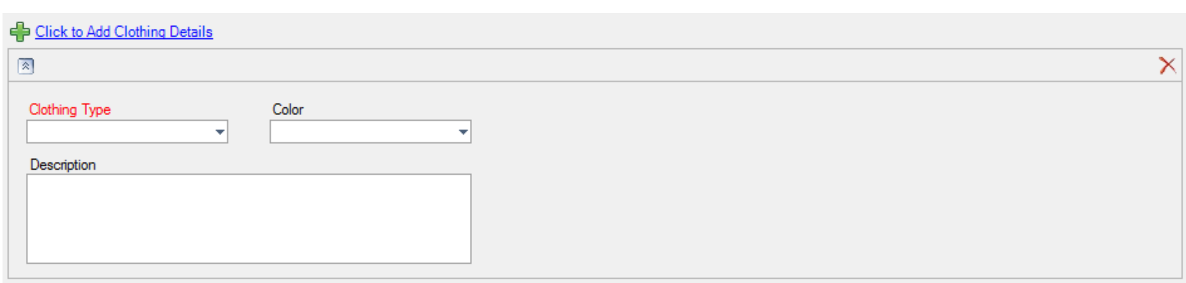

Figure 3.7: Adding Clothing Details to an Involved Person record

Record the Involved Person's Sustained Injuries

Please refer to Figure 3.8 for an example of the following steps.

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

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

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

4. Repeat for as many injury entities as necessary.

Figure 3.8: Adding injuries to an Involved Person record

Note: Once these fields are opened, and whether you enter data or not, if you do not want to keep this information, any text entered in the fields must be deleted () in order to close the area.

Flag the Involved Person

Note: Flag information may populate if this was saved on the Person's record.

Please refer to Figure 3.9 for an example of the following steps.

1. In the Flags section, specify the **Status** (i.e., Yes, No, or Unknown) as well as the **Severity** of each flag (i.e., Critical, High, Low).

   Note: When you change a flag's status to No, a No flag will be applied to the record. Leave the status as Unknown if you want the Incident to remain unflagged.

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

3. Click **OK**.

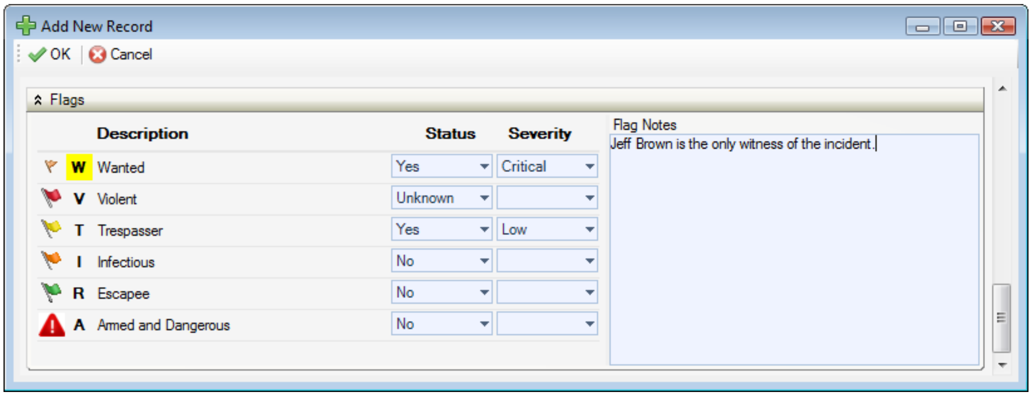

Figure 3.9: Flagging an Involved Person

4. After you click **OK**, the newly created entity will be displayed in the Involved Persons list, with each entity occupying a single row in the list.

   - To display the entity's general information in the bottom Viewing pane, select the corresponding row in the list.

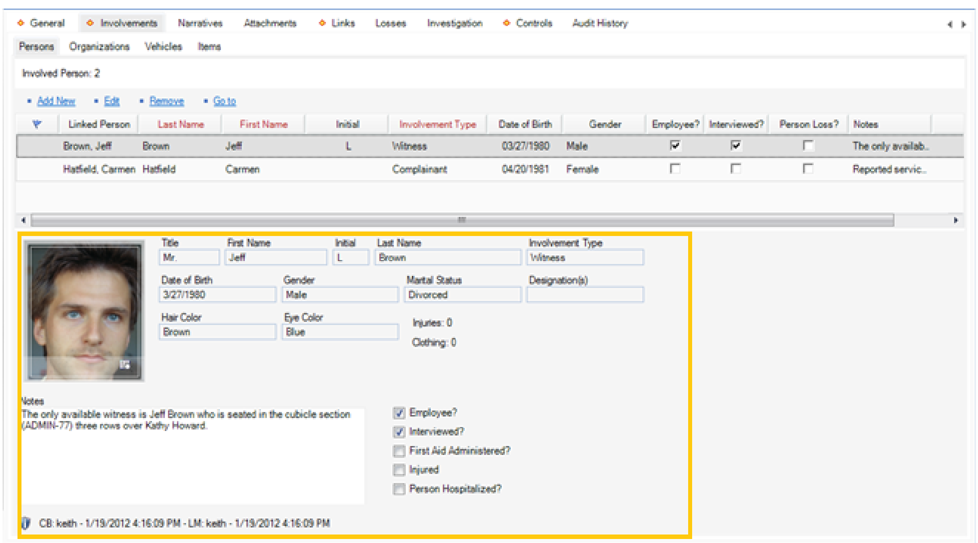

Figure 3.10: Involved Person record

Add Losses and Recoveries Associated with an Involved Entity

*Note: Losses can be added under the **Involvements** tab as well as the **Losses** tab.*

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

2. To add a Loss while in the Involvements tab, double-click the involved entity in the list that you want to associate a loss with (e.g., the Jeff Brown's Person record). In the **Associated Losses** section in the top right corner of the popup window, you will see the summary of the losses associated with the individual, including a summary of the individual's **Exposure, Averted Loss**, **Total Loss**, **Total Recovered** loss, and **Net Loss** (Figure 3.11).

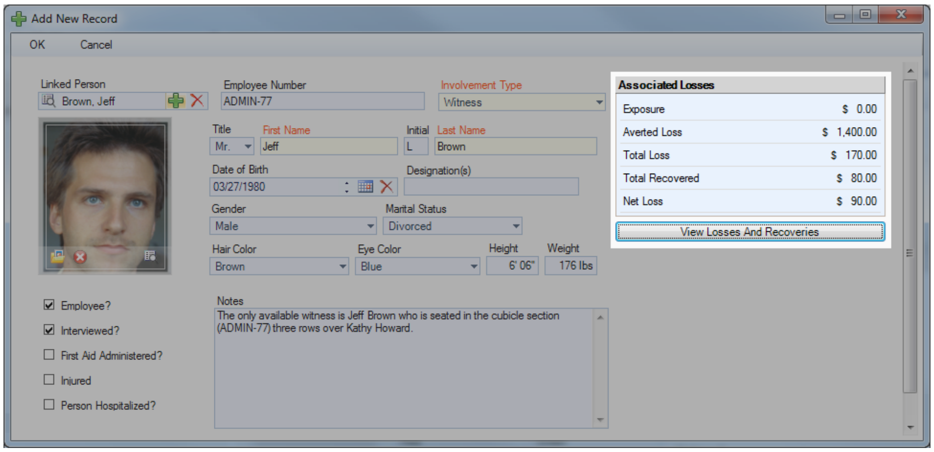

Figure 3.11: Losses associated with an Involved Person

3. To review the details of the losses associated with an entity, click on the **View Losses and Recoveries** button at the bottom of the Associated Losses grid. A new window will open where you will be able to see the **Date** a loss was recorded, the **Type** of the loss, the **Method/Status/Cause** the loss was or could have been incurred, and the relevant value of the loss. From here, you will also be able to add a new loss (Figure 3.12).

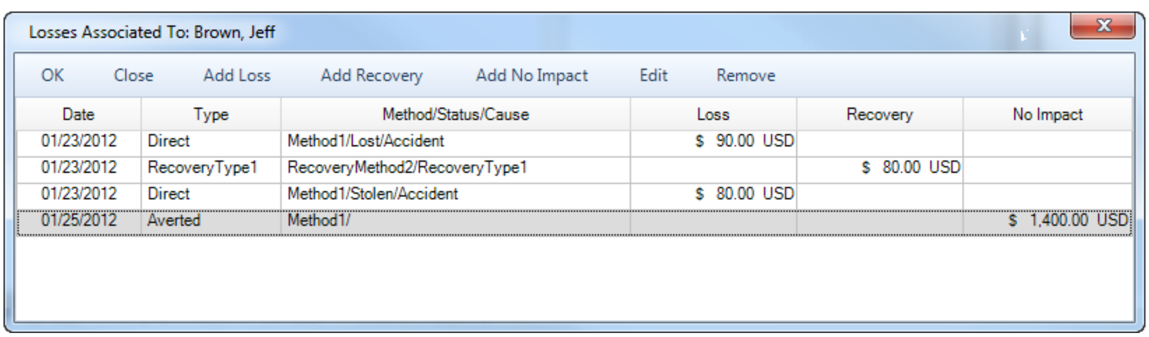

Figure 3.12: Review information regarding a loss

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

- Click Add Loss, to add a loss that has occurred.
- Click Add Recovery, to record a recovery from a loss.
- Click Add No Impact to add a potential exposure loss, or an averted loss that is associated with the involved entity.

5. Depending on the option you choose, a new screen will display a subform designed for the type of loss you selected. Fill out the form's fields following the guidelines in the Record losses involved in an incident section of the Losses tab description (pg. 37).

6. Click **OK**. Once the changes are saved, the recorded loss data will populate the relevant columns of the **Losses Associated To** grid (Figure 3.13).

7. Add as many loss entries as necessary, repeating steps 4-6. Then, click **OK** to save the associated losses on the involved entity's record and to see updated summary calculations in the **Associated Losses** section of the subform (Figure 3.13).

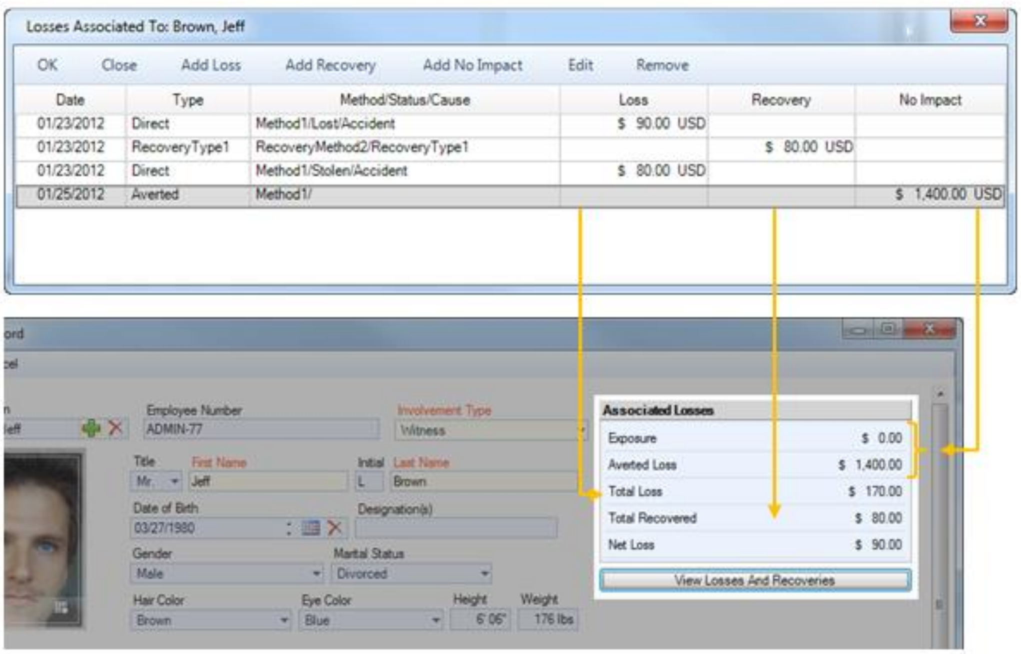

Figure 3.13: Saving losses to an Involved Entity

8. Click **OK** on the main involved entity's subform. The entity's entry in the list will be updated with a checkmark under the **Person/Organization/Vehicle/Item Loss?** column. The loss will also be recorded as a separate entry under the **Losses** tab (Figure 3.14).

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

Figure 3.14: Identifying a Person Loss

Identify Involved Organizations

Please refer to Figure 3.15 for an example of the following steps.

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

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

3. Select the involved organization's record from the **Linked Organization** pick list.

    - If an Organization record does not already exist, use the Quick Add function to create one.

    - The **Organization Name** field will now automatically populate with the linked organization's name. Depending on the data saved on the Organization record, some additional fields may also populate in the Details section.

      Note: Any modifications to the Details section will only apply to the Incident record and will not update the Organization data form. This must be done separately.

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

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

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

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

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

9. Select the name of the organization's primary contact from the **Contact Person** pick list.

    - If a Person record does not already exist for the individual, use the Quick Add function to create one.

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

    - Ensure that you use a consistent format when entering phone numbers.

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

12. To add the organization's logo to the record, click the Add icon in the image box.

13. Locate the image file in the browser window, and click **Open**.

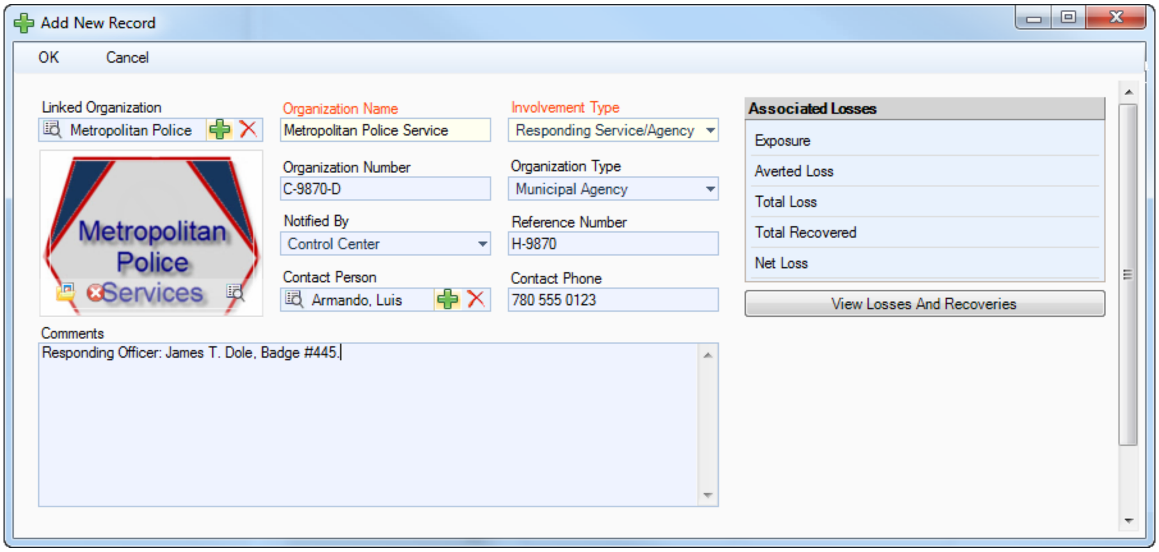

Figure 3.15: Identifying Involved Organizations

Note an Action Request Sent to the Involved Organization

Please refer to Figure 3.16 for an example of the following steps.

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

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

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

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

5. Select the record of the person who has been administered the request from the **Request Assigned To Person** pick list.

    - If a Person record does not already exist for the individual, use the Quick Add function to create one.

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

7. Input any necessary **Notes**.

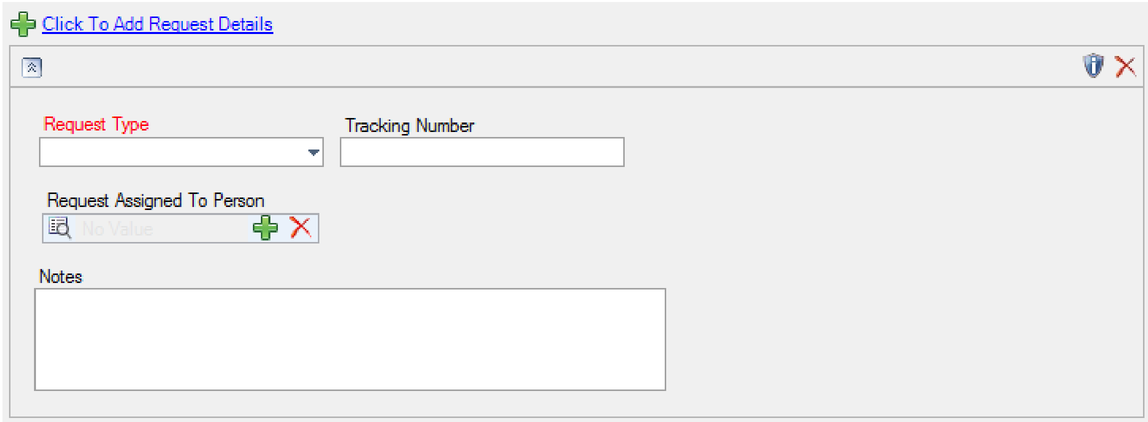

Figure 3.16: Noting an Action Request

Log the Involved Organization's Response to the Incident

Please refer to Figure 3.17 for an example of the following steps.

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

2. Select the record of the person in the organization who responded to the incident from the **Responding Person** pick list.

    - If a Person record does not already exist for the individual, use the Quick Add function to create one.

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

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

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

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

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

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

9. Click **OK**.

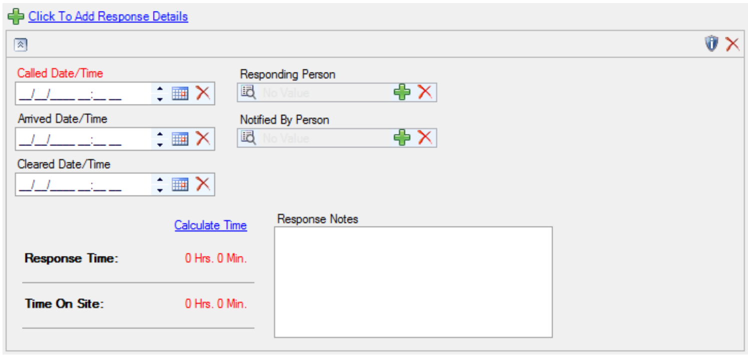

Figure 3.17: Response Details

10. As you click **OK**, the newly created entity will be displayed in the Involved Organizations list, with each entity occupying a single row in the list (Figure 3.18).

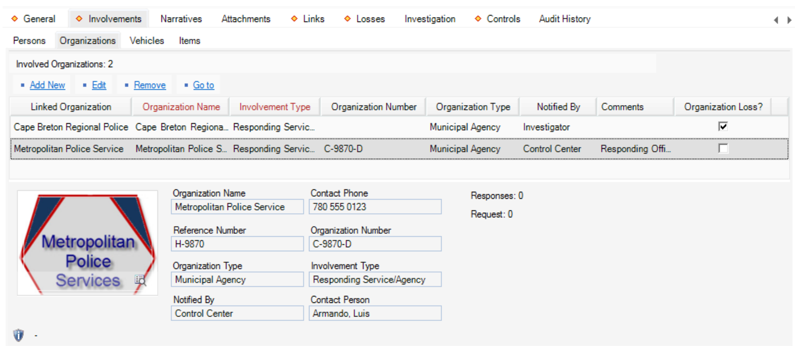

Figure 3.18: Displaying an Involved Organization

Add Losses and Recoveries Associated with the Involved Organization

Complete the operation, as described in the “Identify involved persons” (pg. 22) or the “Add losses and recoveries associated with an involved entity” sections (pg. 26).

Identify Involved Vehicles

Please refer to Figure 3.19 for an example of the following steps.

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

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

3. Select the involved vehicle from the **Linked Vehicle** pick list by clicking on the icon.

   - If a Vehicle record does not already exist, use the Quick Add function to create one.

   - The License Plate field will now automatically populate with the linked vehicle’s license plate number. Depending on the data saved on the Vehicle record, some additional fields may also populate in the Details section.

Note: The fields may be edited or have data entered if none exists. Any modifications to the Details section will only apply to the Incident record and will not update the Vehicle data form. This must be done separately.

4. Indicate how the vehicle became involved in the occurrence by selecting a description from the **Involvement Type** lookup list.

5. Select the most appropriate description of the vehicle's current status from the **Disposition** lookup list (e.g., Seized, Stolen, Released to Owner).

6. If the vehicle's driver was identified, check the **Driver Identified** box. Then, select the driver's name from the **Vehicle Driver** pick list.

   - If a Person record does not already exist for the individual, use the Quick Add function to create one.

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

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

9. Click **OK**.

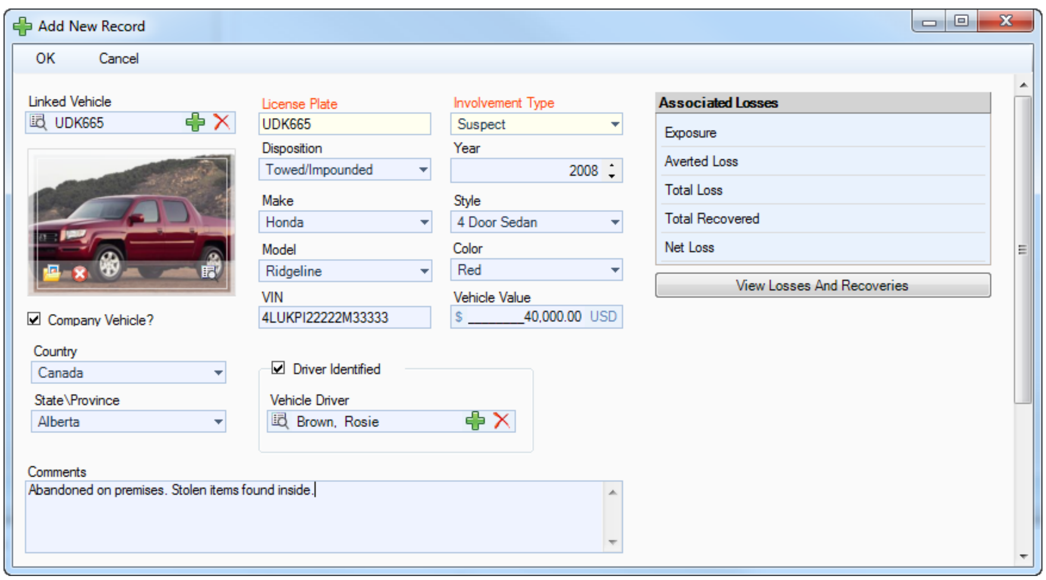

Figure 3.19: Identifying an Involved Vehicle

10. After you click **OK**, the newly created entity will be displayed in the Involved Vehicles list, with each entity occupying a single row in the list (Figure 3.20).

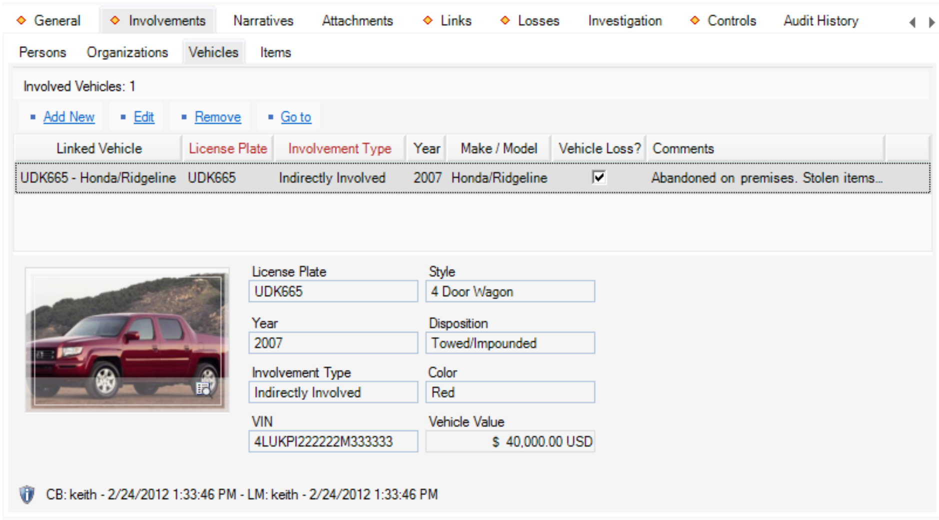

Figure 3.20: Displaying an Involved Vehicle

Add Losses and Recoveries Associated with the Involved Vehicle

Complete the operation, as described in the “Identify Involved Persons” (pg. 24) or the “Add Losses and Recoveries Associated with an Involved Entity” sections (pg. 27).

Identify Involved Items

Please refer to Figure 3.21 for an example of the following steps.

1. Select the **Items** sub-tab.
2. Click **Add New**. A pop-up window will open.
3. Select the involved item’s name from the **Linked Item** pick list by clicking on the icon. If an Item record does not already exist, use the Quick Add function to create one.
4. The **Item Name** field will now automatically populate with the linked item’s name. Depending on the data saved on the Item data form, some additional fields may also populate in the Details section.

   Note: Any modifications to the Details section will only apply to the Incident record and will not update the Item data form. This must be done separately.

5. Add comments about the item in the **Notes** field.
6. To add a photo of the item to the record, click the Add icon in the image box. Locate the image file in the browser window, and click **Open**.
7. Click **OK**.

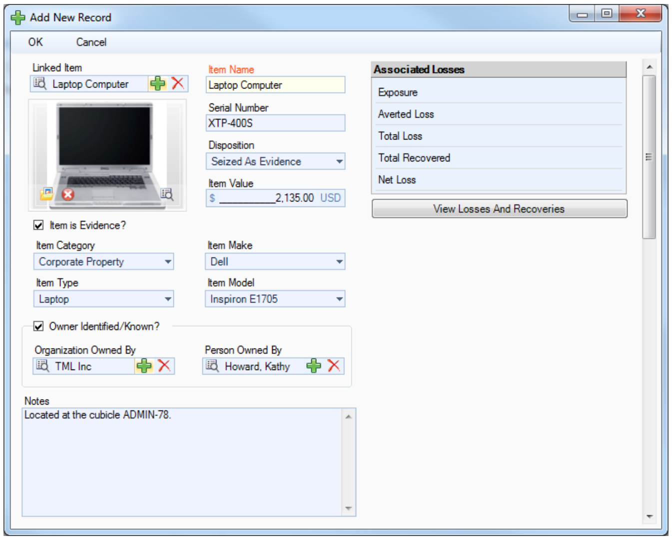

Figure 3.21: Identifying an Involved Item

8. After you click **OK**, the newly created entity will be displayed in the Involved Items list, with each entity occupying a single row in the list (Figure 3.22).

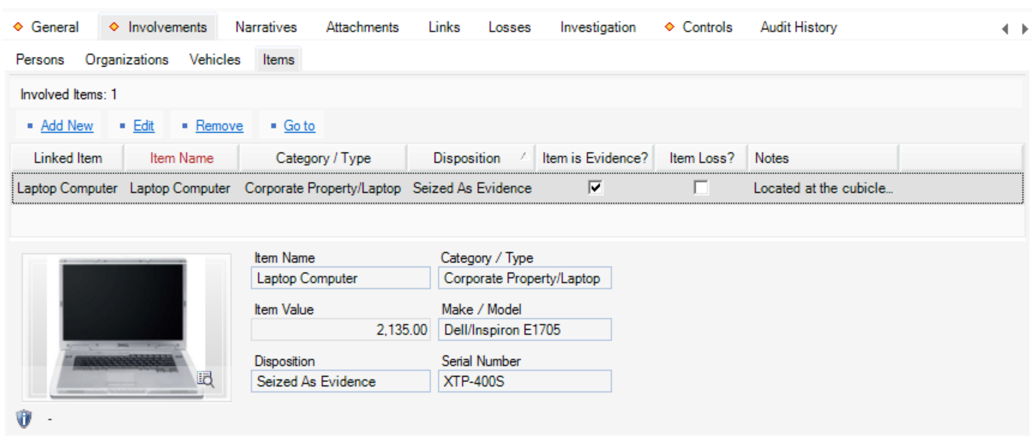

Figure 3.22: Displaying an Involved Item

Add Losses and Recoveries Associated with the Involved Item

Complete the operation as described in the "Identify involved persons" (pg. 22), or the "Add losses and recoveries associated with an involved entity" sections (pg. 26).

Narratives Tab

Add All Executive, Follow-up and Interview Statements

1. Click the **Narratives** tab (Figure 3.23).

2. Click the **Add New** link. The Narrative Editor window will open.

3. In the window, choose the applicable description from **Narrative Type** (e.g., Executive Summary, Original Narrative, Follow-up).

    - By default, your name will appear in the Author field.

4. Type your narrative in the text box.

Figure 3.23: Adding a Narrative

5. When finished composing your narrative, click **Accept**.

    - The Narrative Editor window will close, and the new narrative record will populate the Narratives grid.

Attachments Tab

Attach a File to a Record

Please refer to Figure 3.24 for an example of the following steps.

1. Click the **Attachments** tab.

    - A pictures sub-tab will display any already attached pictures. Right-click the picture to view its title and details, and left-click to open a larger image size.

2. Click the **Files** sub-tab.

3. Click the **Add New** link. A pop-up window will open.

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

5. For each attachment:

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

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

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

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

e. Check the box in the Remove column beside any files you do not want to attach, then click the **Remove** button.

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

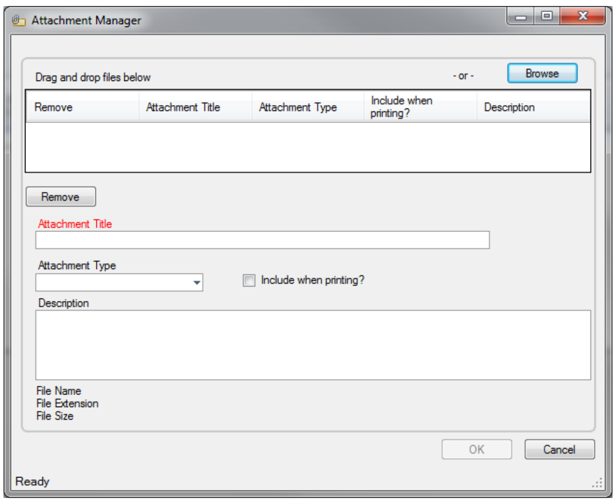

Figure 3.24: Attaching a file to a record

7. To preview attached files, other than the pictures displayed in the sub-tab, ensure the attachment is highlighted in the grid and click **View** (Figure 3.25).

8. Once the attachment is loaded, click **Open**. The attachment file will open in a separate window. Close the window to return to the record.

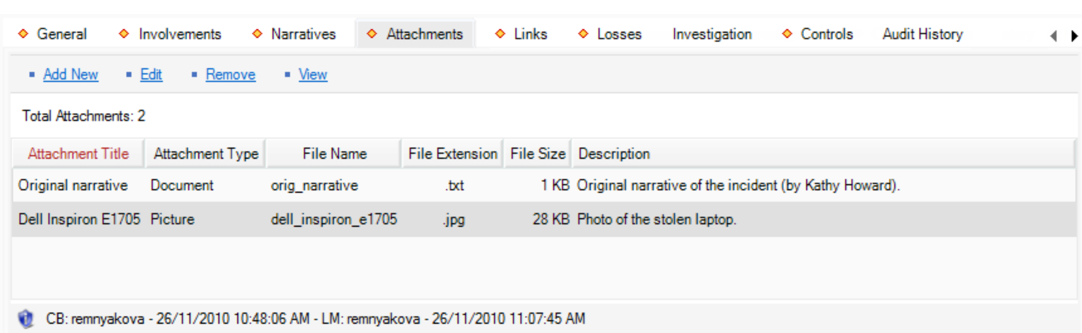

Figure 3.25: Previewing an attachment

Links Tab

Link the Incident to an Activity, Incident or Case

Note: we will link an Activity for this example.

Please refer to Figure 3.26 for an example of the following steps.

1. Select the **Links** tab.

2. Under the appropriate tab; **Activity Links, Incident Links** or **Case Links**, click **Add New**. A pop-up window will open.

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

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

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

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

7. Click **OK**.

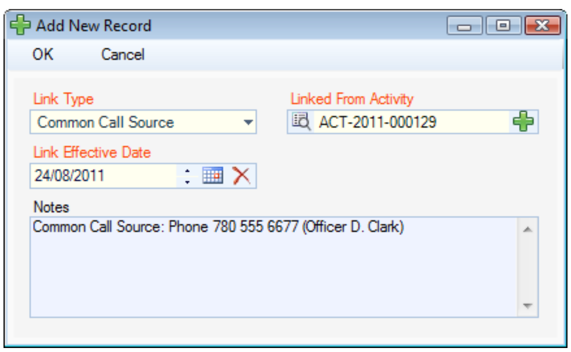

Figure 3.26: Linking an Incident

8. Click **Save** and this link will be automatically cross-referenced with the Links tab of the linked Activity/Incident/Case.

   Note: Activities cannot be linked to Cases.

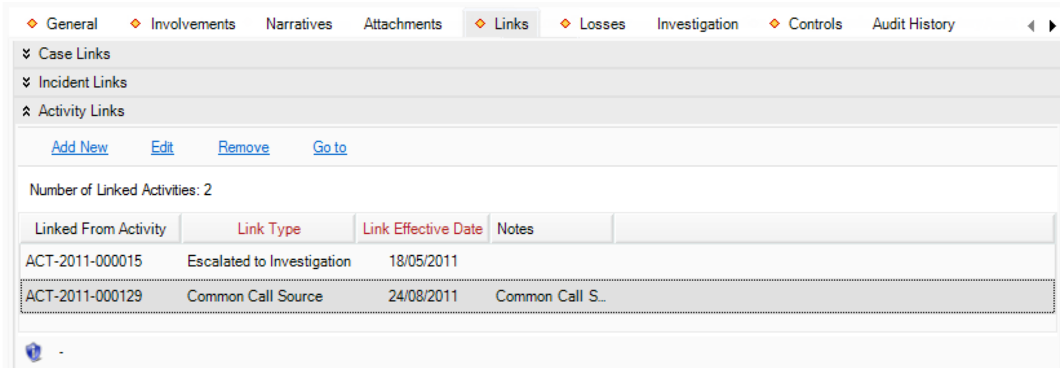

Figure 3.27: Displaying Links

Losses Tab

Record Losses Involved in an Incident

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

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

Please refer to Figure 3.28 for an example of the following steps.

1. To add a loss, open the **Losses** tab and click on the **Add Loss**, **Add Recovery**, or **Add No Impact** hyperlink considering the type of loss that you want to record.
    - Depending on the option you choose, a new screen will display a sub-form designed for the type of loss you selected.

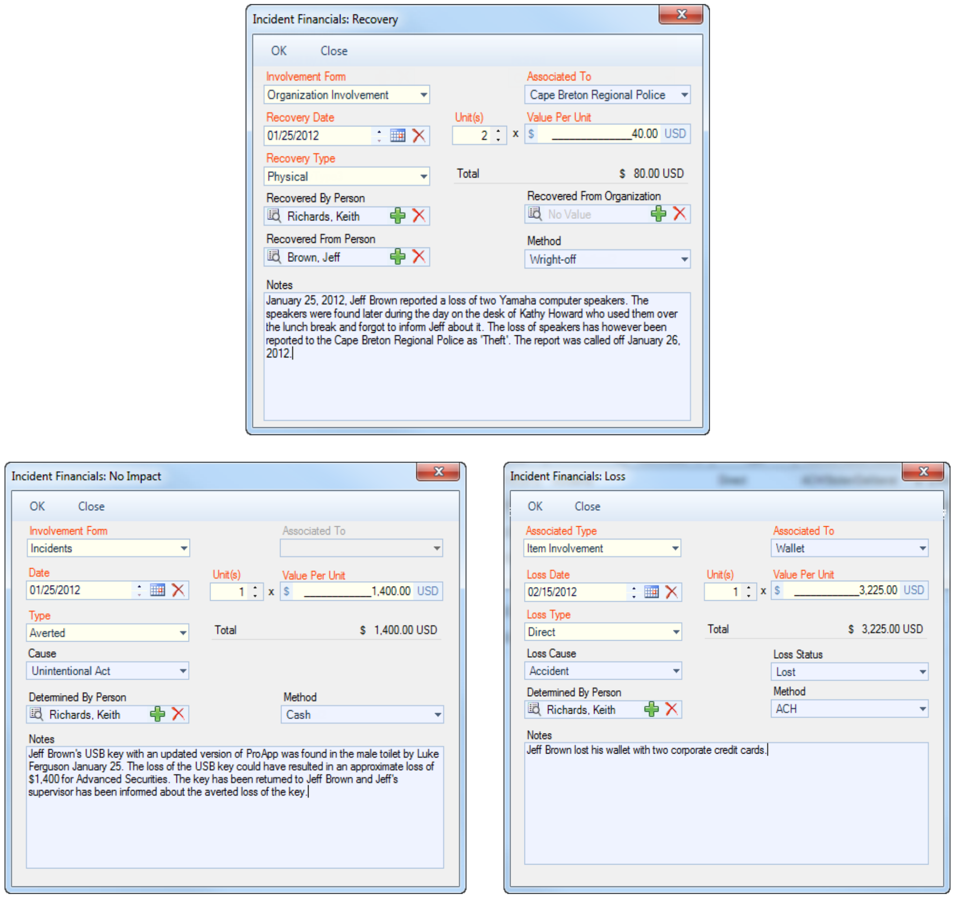

Figure 3.28: Recording a Loss, Recovery, and No Impact

2. In the process of adding a loss, you may choose to either associate the loss with the broader Incident record or with one of the incident's existing involvements (i.e., an involved person, organization, vehicle or item). To specify the type of data with which you want to associate your loss entry, select one of the options from the **Involvement Form** lookup.

   Note: If you want to add a loss associated with an incident's involvement that has not been recorded yet, you must first create an involved record under the Involvements tab before creating the loss record.

3. If you choose to associate the loss with any of the incident's involvements (e.g., Person Involvement), select the specific involvement in the **Associated To** lookup (e.g., Brown, Jeff).

   Note: The options available on the lookup have been cross-populated from each of the involvement's sub-tabs and can only contain involvement records that had been created and saved prior to adding the loss. The same function is available under each of the involvements' sub-tabs.

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

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

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

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

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

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

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

    - By default, the field will contain the name of the person recording the loss.

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

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

13. Click **OK**.

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

14. Click **Save** to synchronize the recorded data within the relevant involvement records and update the summary calculations displayed to the right of the grid (Figure 3.29).

    - **Total:**

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

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

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

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

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

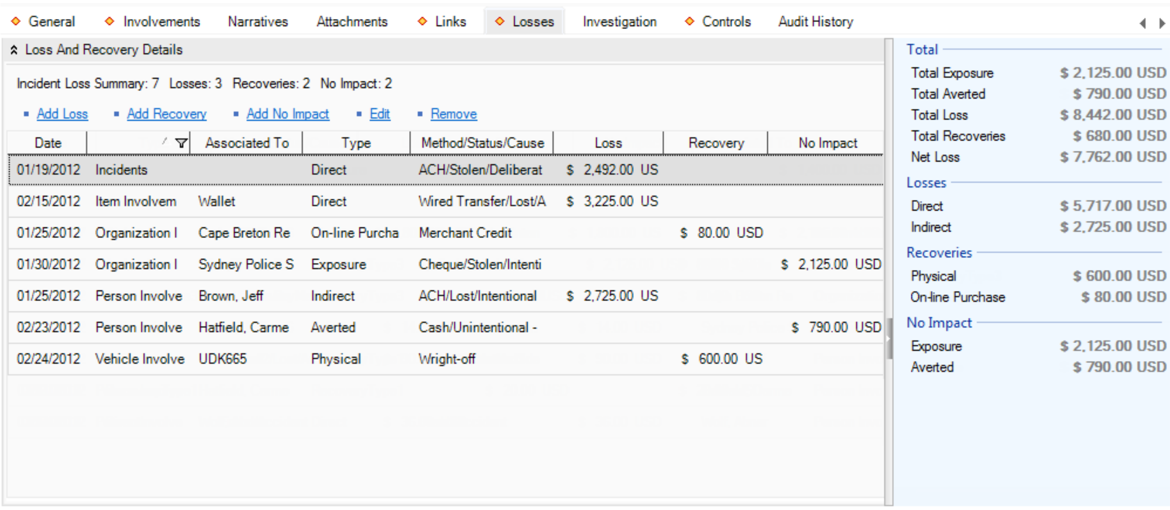

Figure 3.29: Summary of losses

Investigation Tab

Record Incident Investigation Data

Note: The Investigation tab is only available in the ICM and EIM editions of Perspective. Access to the Investigation tab is assigned to users by an Administrator.

Please refer to Figure 3.30 for an example of the following steps.

1. Click on the **Details** sub-tab.

2. In the General section, select the name of the person who ordered the investigation from the **Investigation Initiated By Person** pick list.

   - If a Person record does not already exist for the individual, use the Quick Add function to create one.

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

4. If the investigation has undergone a review, enter the applicable date in the **Investigation Last Review Date** field.

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

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

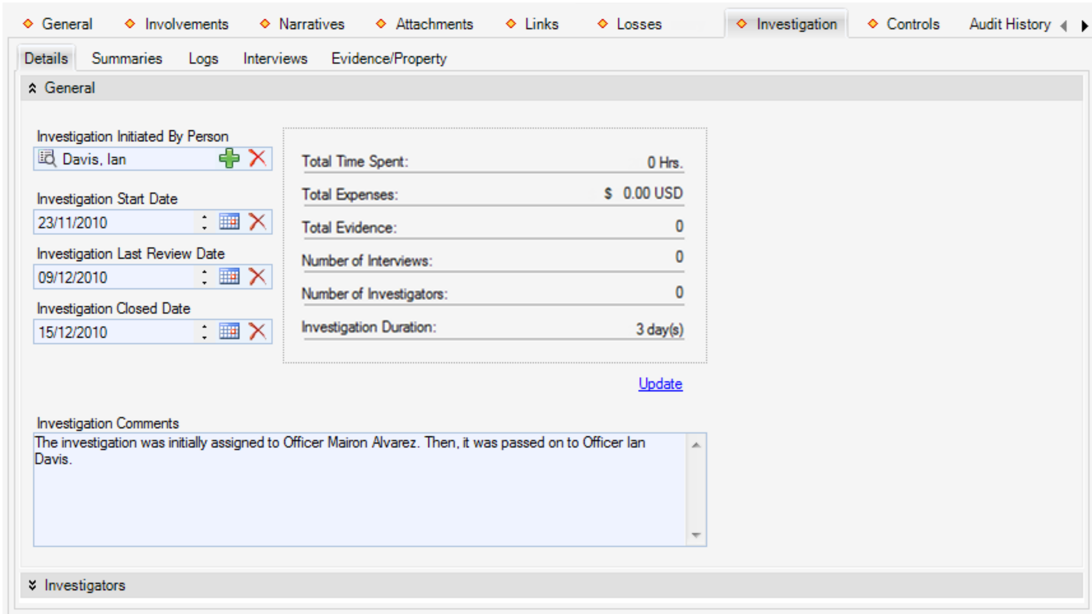

Figure 3.30: Recording Investigation Details

Assign an Investigator to an Incident's Investigation

Please refer to Figure 3.31 for an example of the following steps.

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

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

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

   Note: You cannot Quick Add an investigator; they must already exist in this pick list. The Investigators list is managed by an Administrator.

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

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

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

7. Click **OK**.

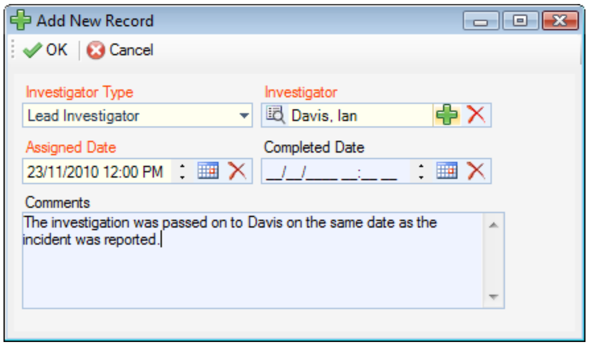

Figure 3.31: Assigning an investigator to an Incident

8. Add as many investigators to the Investigators list as necessary (Figure 3.32).

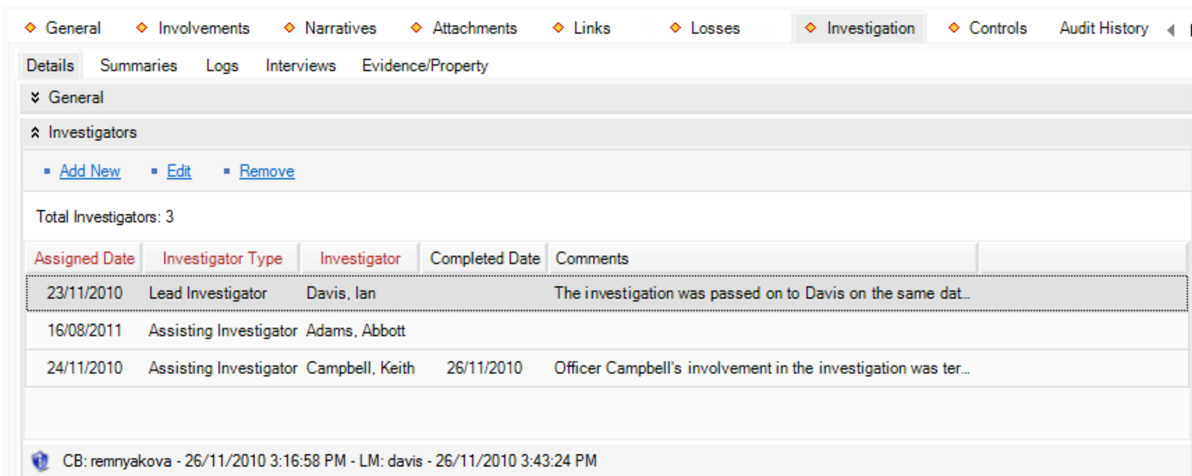

Figure 3.32: Investigator's table

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

   To send an email notification of the assigned investigation to the investigator, ensure the appropriate checkbox is selected and click **Send** (Figure 3.33).

   Note: If the investigator does not have a primary email address entered in the system, an error message appearing beside the investigator's name will indicate that an email cannot be sent.

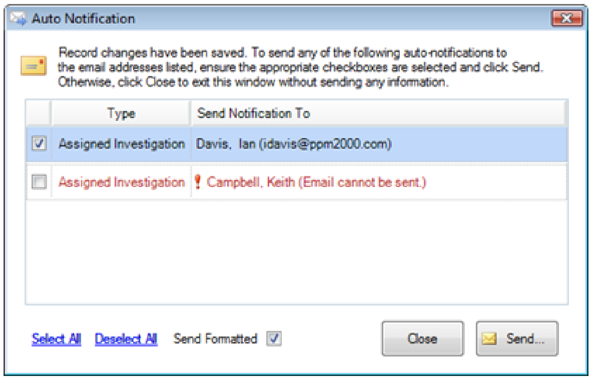

Figure 3.33: Sending an email notification to the assigned investigator

Summarize an incident's investigation

1. Click the **Investigation** tab.

2. Click the **Summaries** sub-tab.

3. Click the **Add New** link. The Summary Editor window will open (Figure 3.34).

4. In the window, choose the applicable description from the **Summary Type** lookup list (e.g., Investigation Summary, Follow-up).

   - By default, your name will appear in the Author field.

4. Type your summary in the text box.

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

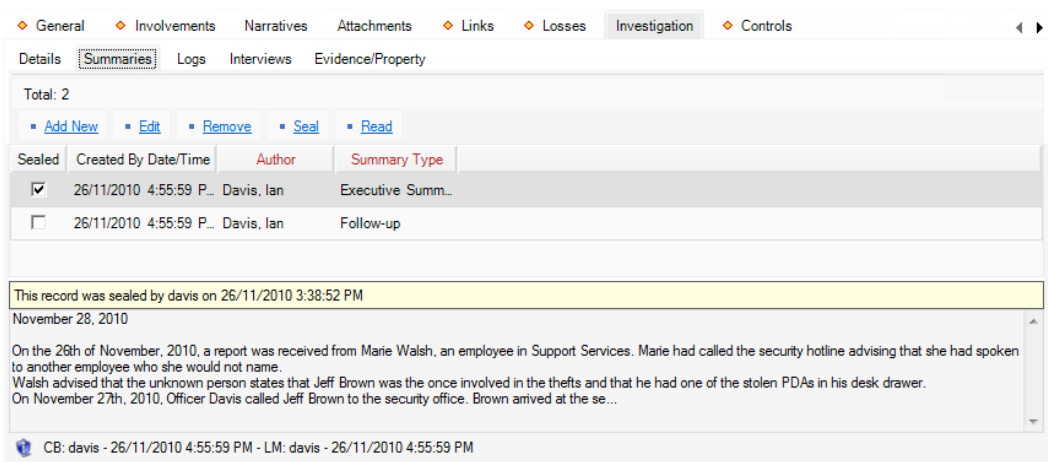

Figure 3.34: Adding a Summary to an Investigation

Log Investigative Tasks and Expenses

Please refer to Figure 3.35 for an example of the following steps.

1. Click the **Investigation** tab.

2. Click the **Logs** sub-tab.

3. Click the **Add New** link. A pop-up window will open.

4. Specify the nature of the task in the **Task Type** field.

5. Select the name of the person who completed or must complete the task from the **Task Done By Person** pick list.

   - If a Person record does not already exist for the individual, use the Quick Add function to create one.

6. If applicable, specify the date the task was finished under **Task Date**, and the time it took to complete under **Time Spent**.

7. If there is an expense associated with the task, enter the **Expense Type** and the total **Expense Amount**.

8. Check the **Follow-up Required?** checkbox, if applicable.

9. Enter any additional information about the task under **Log Notes**.

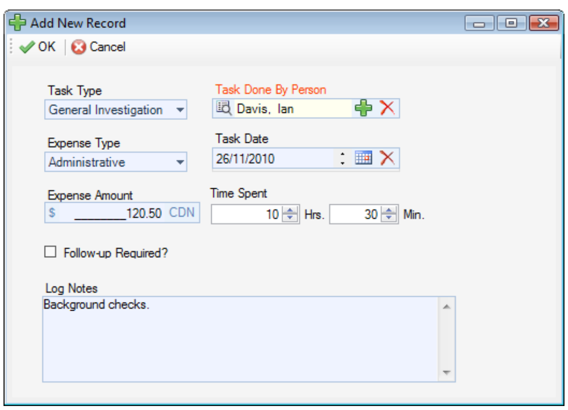

Figure 3.35: Log tasks and expenses

10. Click **OK**. The investigative task and/or expense will be added to the Logs grid (Figure 3.36).

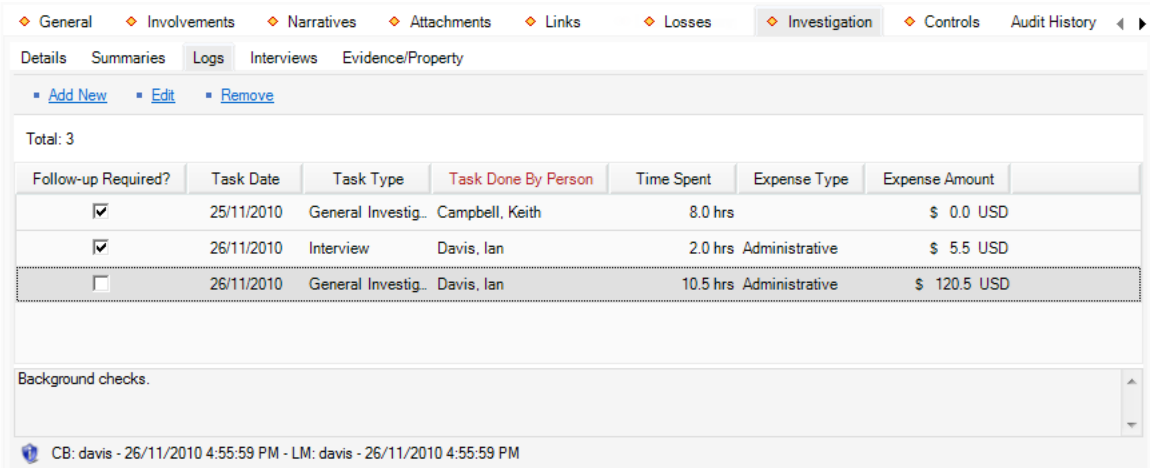

Figure 3.36: Logs table

Document Investigation Interviews

Please refer to Figure 3.37 for an example of the following steps.

1. Click the **Investigation** tab.

2. Click the **Interviews** sub-tab.

3. Click the **Add New** link. The Interview Editor window will open.

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

5. Select the name of the person who was interviewed from the **Subject of Interview** pick list.

   - If a Person record does not already exist for the individual, use the Quick Add function to create one.

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

7. Select the name of the person who conducted the interview from the **Interview Conducted By** pick list.

   - If a Person record does not already exist for the individual, use the Quick Add function to create one.

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

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

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

11. Check the **Interview Recorded?** box, if applicable.

12. Type the interview transcript in the text box.

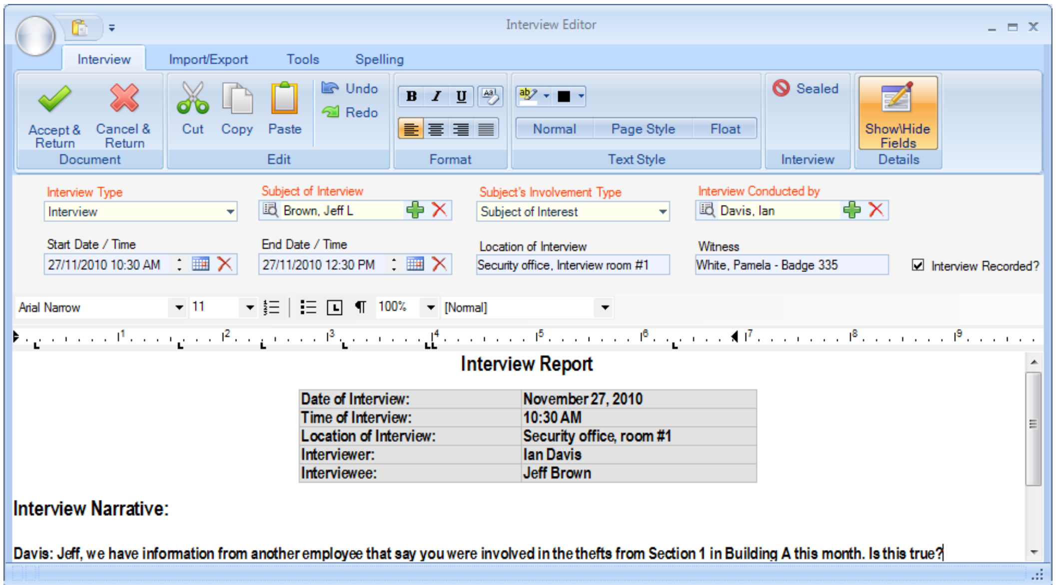

Figure 3.37: Documenting an interview

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

Track Investigation Evidence

Please refer to Figure 3.38 for an example of the following steps.

1. Click the **Investigation** tab.

2. Click the **Evidence/Property** sub-tab.

3. Click the **Add New** link. A pop-up window will open.

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

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

6. If known, select the name of the organization or person who owns the item from the **Owner Name Organization** or **Owner Name Person** pick lists.

    - If an Organization or Person record does not already exist, use the Quick Add function to create one.

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

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

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

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

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

12. To add an image of the item to the record, click the Add icon in the image box.

13. Locate the image file in the browser window.

14. Click **Open**.

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

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

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

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

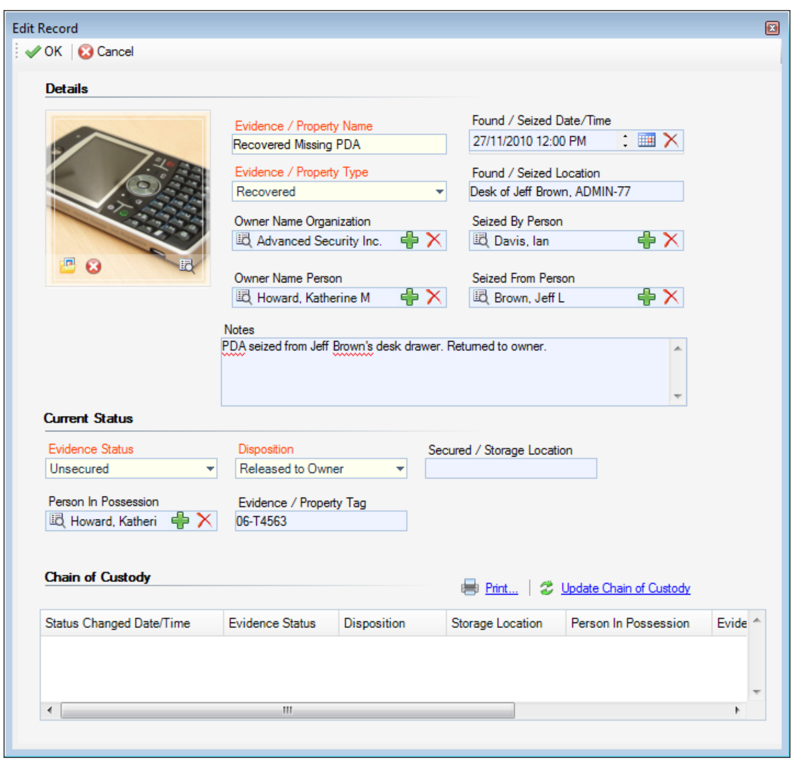

Figure 3.38: Tracking evidence

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

Chain of Custody:

1. Click on the piece of evidence from the Evidence/Property grid that you want to Update

2. Click **Edit**.

3. Update the **Evidence Status**, **Disposition**, **Storage Location**, **Person in Possession**, and/or **Evidence** fields.

4. Click **OK**.

5. A pop-up window will open indicating that one or more of the status fields have been changed.

   - By default, the current date will appear in the Status Changed Date/Time field.

     a. Modify this if the item's status actually changed at an earlier date.

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

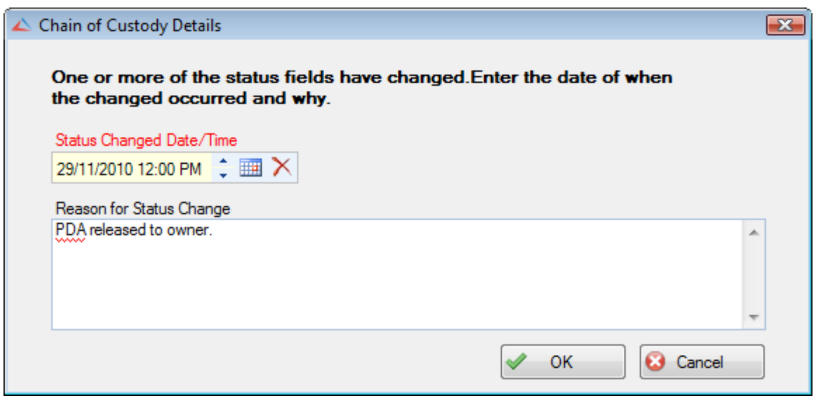

Figure 3.39: Updating evidence details

6. Click **OK**. A new entry will now appear in the evidence record's Chain of Custody section, detailing, among other things, when and why the change was made (Figure 3.40).

7. If you want to print the Chain of Custody list, click the **Print** hyperlink.

   Note: The Chain of Custody is not included in the Investigation Report; therefore, this printing option is only available via the Evidence/Property sub-tab.

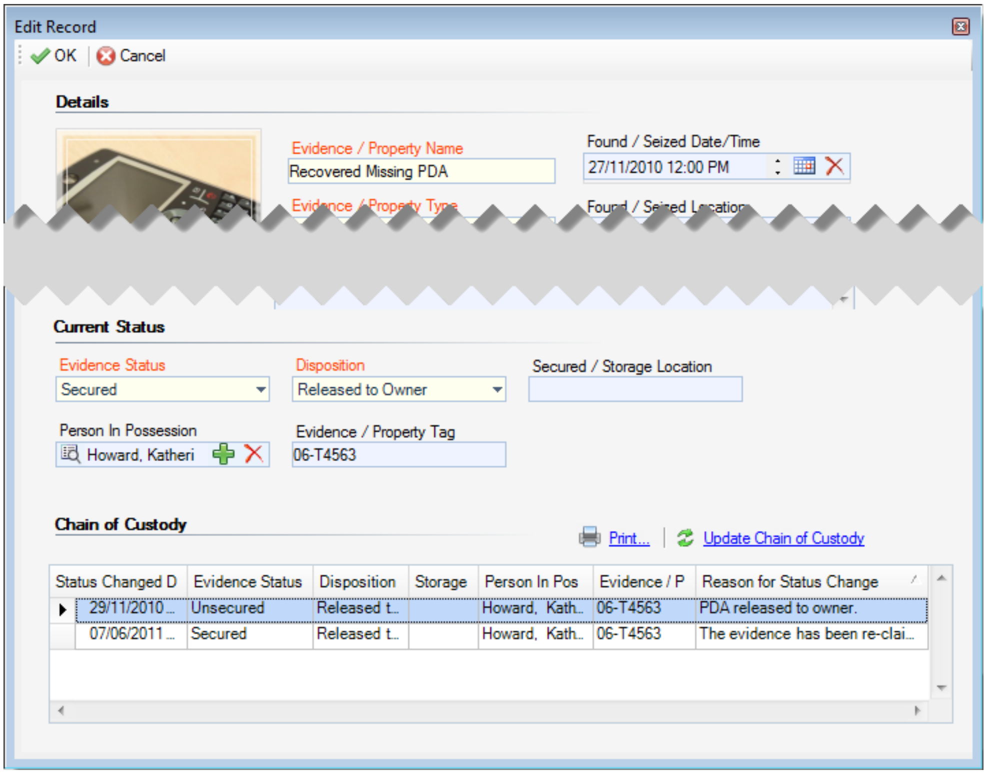

Figure 3.40: Updated evidence entry

Controls Tab

Set the Security Controls and Status of a Record

Please refer to Figure 3.41 for an example of the following steps.

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

2. In the Controls section, fill out the **Org Level** fields to set the record visibility settings for the various groups within your organization.

3. In the **Access Level** field, set the security level from 1 to 5 (highest).

    - Each security level corresponds to a specific security description, such as Classified. Only users with the same security Access Level as the one you select (or higher) will be able to view the record.

      Note: The Access Level field will default to the same level as your Access Level. Depending on the privileges set by your Administrator, this may be adjustable.

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

Note: This will make the record invisible to all users, regardless of a user's security level and/or record accessibility. Archived records can be searched by creating a Quick View.

5. Set the **Status** of the record to Open or Closed.

   - Meanings of open and closed are dependent on your organization's definition of these statuses. Generally, an open record means that it is actively being worked on or, possibly, that it is inactive for a finite amount of time. The closed status in this case would mean that the record is no longer being worked on due to completion or inactivity for an indefinite amount of time.

6. Select the most appropriate description of the record's current standing in the **Disposition** field (e.g., Inactive, Pending Court, Waiting for Approval).

7. If any policy, legislation, or business rule pertinent to your organization's procedures requires information about the record, or the persons involved in the record, to be kept for a certain length of time, enter the end date of that period in **Expiry Date**.

   Note: No information will be automatically deleted on this date; it is for tracking purposes only.

8. From the **Record Owner** pick list, select the Person record that corresponds to the individual who is responsible for closing the record.

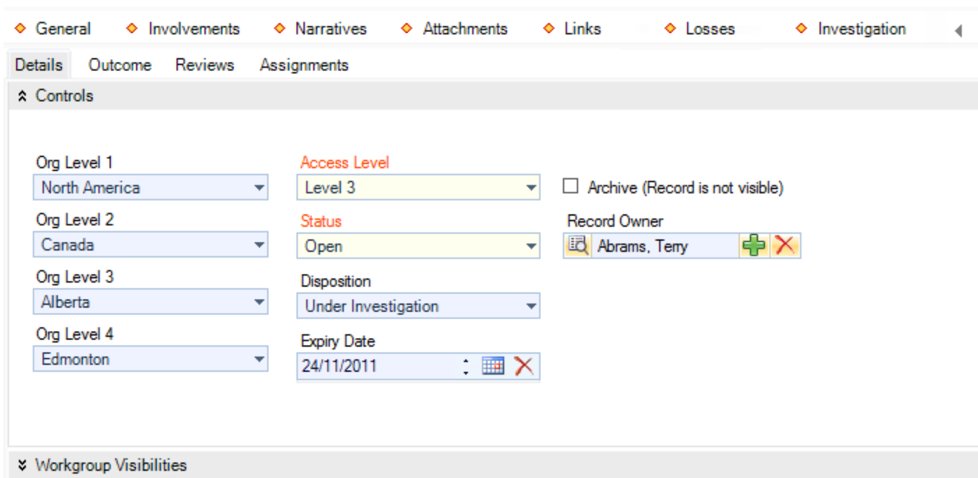

Figure 3.41: Setting the security controls and status for a record

Define Which Workgroups Can Access a Record

1. In the **Workgroup Visibilities** section, select the **Owner Workgroup**.

2. Determine the access right for **All Other Workgroups**, selecting from the *Read, Update*, or *None* access right options (Figure 3.42).

3. To set customized access for a workgroup that does not conform to the other control settings specified in step 2, click **Add Exception(s)**. A pop-up window will open.

4. Select the workgroup and then select the workgroup's visibility for this record (*Read*, *Update*, or *None*). Continue to customize workgroup visibility for as many workgroups as you like.

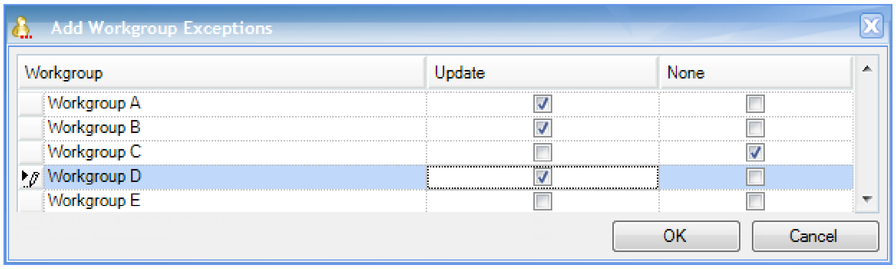

Figure 3.42: Determining access rights for a record

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

Describe the Incident's Causes and Consequences

Please refer to Figure 3.43 for an example of the following steps.

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

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

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

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

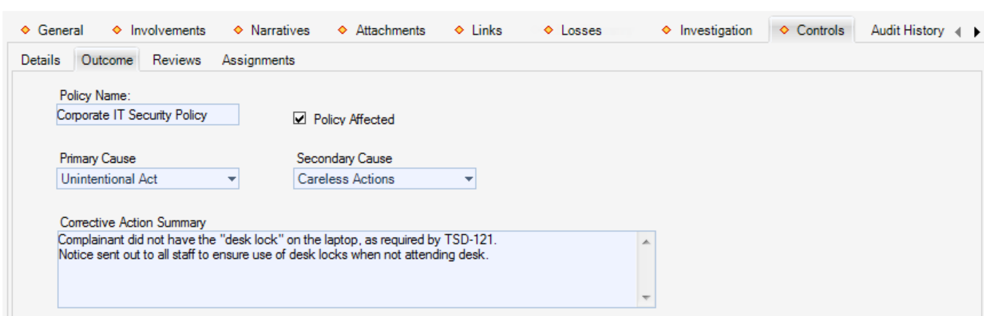

Figure 3.43: Describing causes and consequences of an Incident

Track Reviews of a Record

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

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

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

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

5. Complete the **Review Date.**

6. Enter any comments regarding the review in the **Comments**.

7. Click **OK**. The new review will be added to the **Reviews** grid.

Give a Record-Related Assignment to Another User

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

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

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

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

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

    Note: you cannot Quick Add a user; they must already exist in this pick list.

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

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

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

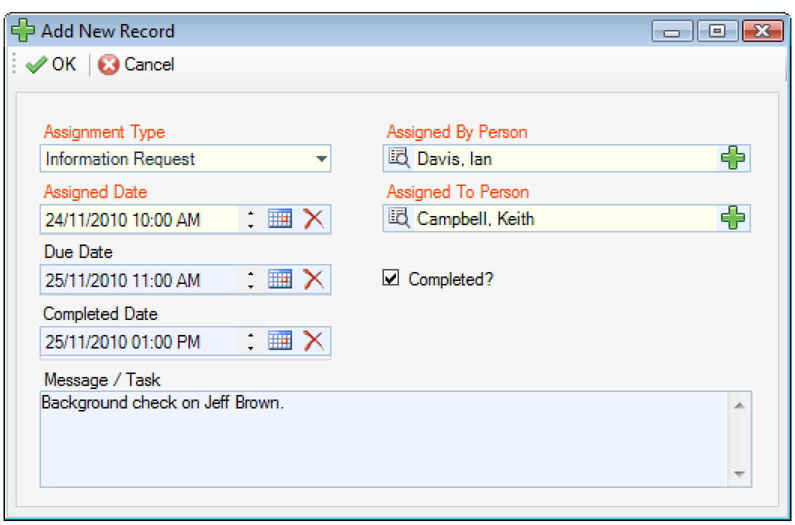

Figure 3.44: Giving a record-related assignment to another user

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

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

    - To send email notifications of the assignments to the Assigned To Persons and/or of the completed assignments to the Assigned By Persons, ensure the appropriate checkboxes are selected and click **Send**. Notifications are automatically sent in HTML. Deselecting the **Send Formatted** box, prior to clicking Send, will format the notification details in plain text rather than the default HTML table. The dashboards of the Assigned By and Assigned To persons will be populated with relevant assignments, regardless if the notification is sent or not (Figure 3.45).

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

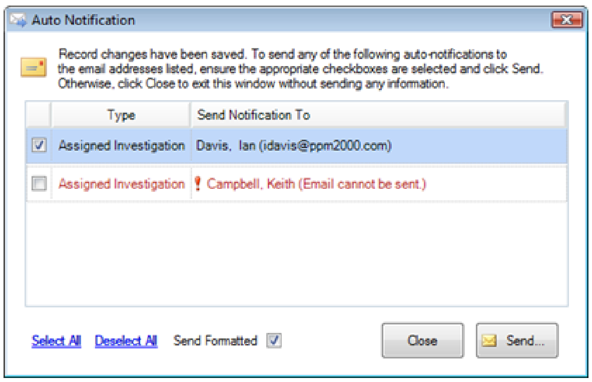

Figure 3.45: Auto-notification box that pops up to give you the option to send an email notification

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

18. Check the message details, adding any other information that you think is necessary, and then click **Send** (Figure 3.46).

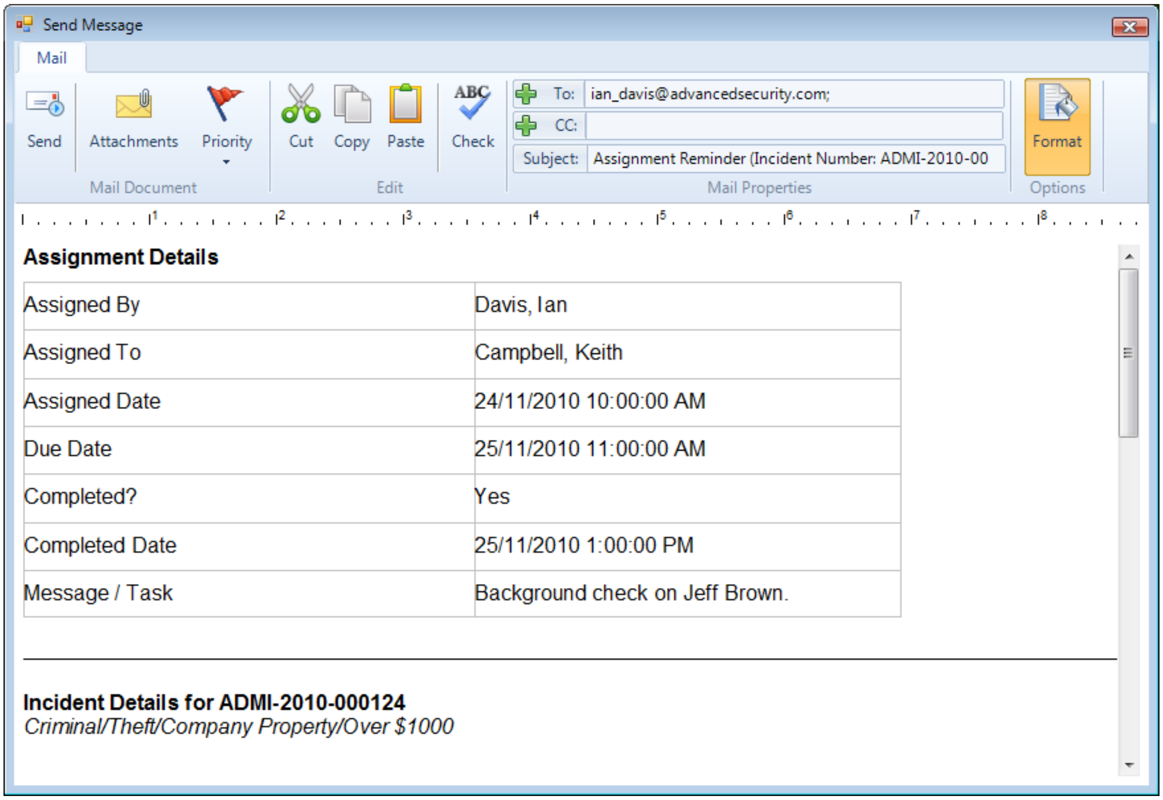

Figure 3.46: Sending an email notification

Edit a Record

1. Locate the desired record in the listing pane. If you know a part of the name or number of the required record, use the search tool located at the top of the listing pane. To search for a specific record, enter the name or partial record number and select (Figure 3.47).

Note: The search tool only filters text in the record number field of all Activities, Incidents, and Cases. As well as the File Number field (incident records), Case Name field (case records), Item Name, Serial Number fields (item records), Persons Last Name and First Name fields (Persons records), Organization Name and Organization Number fields (Organization records), and License Plate and VIN fields (vehicle records).

.

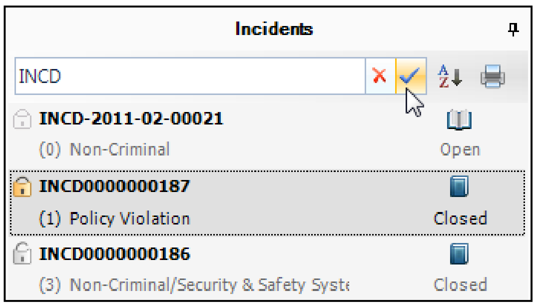

Figure 3.47: Locating a record

Note: If needed, use the A to Z sorting icon , located at the top of the Listing pane, to switch the record list view in the Listing pane between ascending and descending alphanumeric.

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

3. Click **Edit** on the Viewing pane toolbar and make the required applicable changes.

Manage Your Listing Pane

Display All Records in the Listing Pane

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

2. To display all of the entity's records in the Listing pane, with no filters applied, click **All Records** (Figure 3.48).

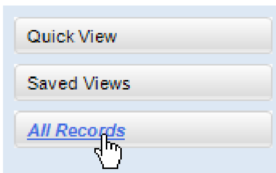

Figure 3.48: Displaying all records

Create and Save a New Record View

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

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

3. Click the **Add** button in the Saved Views section.

4. Type a name for your customized view in the active **Enter View Name** field (Figure 3.39).

5. Customize your desired view starting with the **Workgroups** section.

   - By default, the All Workgroups box is checked to include records for all workgroups in your customized view. If you want to restrict your view to the records of a particular group, uncheck the All Workgroups box and proceed to select the desired workgroups.

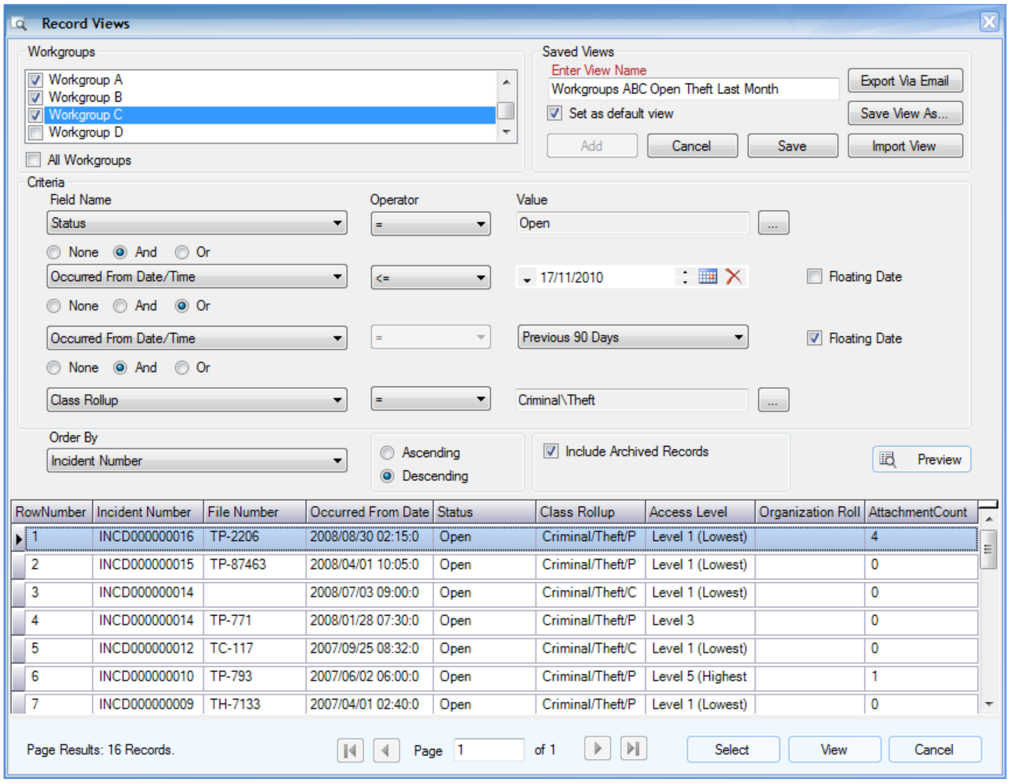

Figure 3.49: Creating and saving a new record view

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

   a. In the top **Field Name** lookup list, select the field that you want to set as the main criterion for narrowing your record view.

   b. Choose an **Operator** for the field (e.g., equal (=), greater than (>), less than or equal (<=), Begins With, Contains, etc.).

   c. Enter the compared criterion Value. If the **Selector** button  is available, click it to display a tree of Value options in a separate window. For example, if you are creating a Saved View of Incident records and your chosen Field Name is Class Rollup, you may select an Operator of equal (=) and a Value of Criminal/Theft to restrict your view to only those records classified as Theft.

   d. If you want to include an additional field in your record view criteria, select the **And** or **Or** radio buttons and complete the Field Name, Operator, and Value fields below. You may include up to four fields in your record view criteria.

      To specify a static date range, specify two temporal criteria (e.g., one for the *greater than* ">", and one for the *less than or equal to* "<=" operator) using the **And** logic between them to combine the criteria into a set date range.

7. Choose a display order for your record view by selecting a field from the **Order By** lookup list (e.g., order records by Incident Number, Access Level, Status), then select either the

Ascending or **Descending** radio button to further define the record order. Ascending lists the records according to the chosen Order By field in alphabetical order, or from lowest number to highest. Descending lists the records according to the selected Order By field in reverse alphabetical order, or from highest number to lowest.

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

   Note: This is the only way to view archived records in the listing pane. The records will be invisible to all users, regardless of his/her Access Level, Org Rollup, or Workgroup settings.

9. Click the **Preview** button to generate a list of records meeting your set criteria in the order specified. The number of records found will be provided below under **Page Results**.

10. To quickly view a particular record in read-only mode, select the record in the Preview list and click **View**. A separate window will open with the record details displayed.

11. If you want to save the record view for future use, complete the **Saved Views** section. Otherwise, proceed to the next step. Perspective provides two saving options for your newly created view:

    - To save your record view for future use in Perspective, click **Save**. Your newly created record view will now be available under the Saved Views menu.
    - If you want to set this customized view as your default view (the record view that will automatically load each time you enter this data form), click the **Set as default view** box, and click **Save** again.
    - To save your record view as an XML or TXT file for possible sharing with other users, click **Save View As** and select the location for the export. The record will be assigned an automatically generated number.

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

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

Access a Saved Record View

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

2. Click **Saved Views** and select the particular record view that you want to access. The record view will now appear in the Listing pane (Figure 3.50).

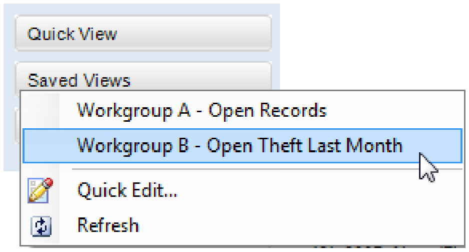

Figure 3.50: Saved views

Edit an Existing Record View

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

2. Expand the **Saved Views** menu.

3. Select **Quick Edit**. The Record Views window will open (Figure 3.51).

4. If you have not yet opened a saved record view and your Listing pane is blank, select an existing view you want to edit under the **Saved Views** menu. Its settings will be displayed. However, if your Listing pane displays a selected record view, the Record Views window will open with the active record view's parameters displayed.

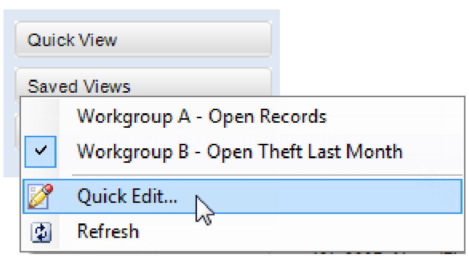

Figure 3.51: Editing an existing record view

5. Modify the parameters as required.

6. To save the view replacing the parameters previously set, click **Save**.

*Note: If you opened an existing view in the Listing pane, made changes to it, saved it and then re-opened the modified view, you may need to click the **Refresh** button in the **Saved Views** menu to refresh the view of your Listing pane with the new settings.*

Import a View

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

2. Select **Quick View** in the Navigation pane.

3. In the Record Views window, click the **Import View** button and browse for the file that contains the view in XML or TXT format that you want to import. Once you import the view, its settings will be displayed.

4. Optionally, modify the parameters of the newly imported view and/or save them under a new view name. Click the **Select** button to transfer your record view to the Listing pane.

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

Additional Information

For information regarding the Data Forms, Analysis Expert, Reporting, and Administration components, please see our complete Perspective Version 4.6 User Guide.

Glossary

Activity	An activity is an event or series of events with which security personnel may become involved. In Perspective, activities are created, scheduled, and assigned to officers or organizations with the help of the Perspective Dispatching component. When an activity has been closed, the corresponding Activity record is transferred to the Activities component within Data Forms, where it can be further described, investigated and analyzed.
Administrator	An Administrator sets up Perspective, changes settings and assigns security protocols to users. Administrators have the highest level of access to all records, forms and fields; they have no visibility or access restrictions within the program.
Assignment	An assignment is a task that is given to a user by his or her supervisor. Only authorized users can create assignments.
Authentication	Authentication refers to a security measure requiring a user to enter proof of identity (e.g., a User Name and Password) before accessing a network, program, file or other information.
Averted Loss	In Incident and Case records, a loss that is associated with an involved entity and that is avoided in the course of an incident as a result of a preventative action.
Banner	A banner is a long rectangular button that opens a new section of the program when clicked (e.g., the Data Forms banner, the Analysis Expert banner, etc.).
Call Category	A Call Category rollup describes an activity according to its type specifications: Level 1, Level 2 and Level 3. Call Category rollups are hierarchical, meaning that the option selected in the first level of the hierarchy, Level 1, determines what options are available in the second level of the hierarchy, Level 2, and so forth.
Case	A case is a grouping of incidents related by person, item, location, class or other commonality, generally requiring further investigation. (Case management is only available in the ICM and EIM editions of Perspective.)
Class Rollup	A Class Rollup describes an incident according to its Class, Category, Subcategory and/or Type. Class Rollups are hierarchical, meaning that the option selected in the first level of the hierarchy, Class, determines what options are available in the second level of the hierarchy, Category, and so forth.

Component	A component is a program subdivision represented by a specific type of form. For example, the Data Forms component of Perspective contains such forms, or components, as Incidents, Cases, Activities, Items, etc. The components within Data Forms are graphically represented by banners accessible from the Navigation pane.
Dashboard	The Dashboard is like the Home page or main screen of Perspective. It displays charts summarizing incident information, as well as messages and assignments from supervisors.
Data	Data is information.
Data Entry	Data entry is the process of placing information, or data, in a database. This is usually accomplished by typing data into fields in data forms.
Database	A database is a collection of data stored in a structured format. A database might be compared to an electronic filing cabinet. Databases are often organized into tables that store related information in the form of records (e.g., Incident records, Person records, Item records, etc.).
Desktop	Generally, when a computer is turned on, the screen opens on the desktop. This is the area where icon shortcuts are found, including My Computer and the Recycle Bin. All types of files can be saved onto the desktop.
DispatchLog	DispatchLog is an integrated component of Perspective that enables Security Departments to quickly and easily dispatch personnel and agencies and to create work orders associated with dispatching activities. As calls come in, you may use the DispatchLog to easily track the location, category and priority of the activities and to keep up-to-the-minute records on your officers' activities, including such details, as which officers are available for response, when they arrive on scene and when they return. Once an activity has been closed in DispatchLog, it is transferred to the Activities component of the Data Forms, where it can be further described and investigated. The banner that opens DispatchLog is located on the Navigation pane.
Drop-down	A drop-down list or menu offers a range of selections that have been condensed to save screen space. Click on the down arrow on the right side of a drop-down field, and the field will expand to display a list of options. Select an option by clicking it.

e-Incident	An e-Incident is an electronic Incident report. It may be created in one of Perspective's optional components (e.g., Perspective e-Reporting), or it may be imported via Perspective's Import Manager tool.
Entity	An entity is an object, person, event or other concept that provides information about a larger category recorded in Perspective. For example, in order to create a detailed Incident record, you may need to enter such entities, as involved persons and items, attachments, assignments, losses, pieces of evidence, etc., that help to create a full picture of the larger category – the incident.
Entity Record	An entity record is a collection of data related to a particular entity (e.g., the record of an Involved Person, Assignment, Loss, etc.). In Perspective, entity records are stored as rows in a table that can be expanded into editable or viewable sub-forms.
Export	To export a file is to convert a file created in one software program or application into a format that is usable in another application. For example, exporting a set of query results to Microsoft® Excel® involves converting the results into a format suitable for use in Excel.
Exposure	In Incident and Case records, the amount of potential monetary loss associated with an involved entity.
Field	A field is an element within a form that allows you to enter or access a specific nugget of information related to the record type. One field in an address record might be "Street".
Filter	When filters are applied in directory searches, they tell the program to return only records in which the content of a specific field matches the criteria set by the user.
Form	A form is a part of the user interface that allows you to interact with the information contained in the database via a screen populated with related fields and designed to perform specific program functions, like reporting an incident, conducting searches, preparing reports and so forth.

Gateway	The Gateway serves as an inbox for all electronic reports generated using one of Perspective's optional components (e.g., Perspective e-Reporting) or imported via Perspective's Import Manager tool. Once an electronic report lands in the Gateway, the Gateway Administrator and/or Gateway Approver are responsible for assessing it and determining whether or not the report should be accepted into Perspective as a valid Incident, Item, Person, Organization or Vehicle record.
Hierarchy	A hierarchy is organized into successive levels or layers with each level subject to the preceding levels in the hierarchy. For example, the Class Rollup is divided into four fields ordered hierarchically (Class, Category, Subcategory and Type); a selection made in the Class field determines what options are available in the Category field and so forth.
Hyperlink	A hyperlink refers to an image or a string of text that retrieves a file, Web page or other related information when clicked.
Icon	An icon is a small graphic used to represent a particular file, program or function. Clicking the icon will open the file or program, or perform the appropriate function.
Incident	An incident is an unusual action or situation affecting persons or property, either accidental or purposeful, which requires notice or follow-up by a security or human resources department.
Interface	Interface in Perspective refers to the visual on-screen means (e.g., windows, dialog boxes, buttons, banners, panes, or icons) by which Perspective components and components communicate with the user to allow for a seamless entry, display, analysis and transfer of data.
Investigation	An investigation is a follow-up or close examination of an incident (or of a case linked to one or more incidents) in order to gather facts and learn more about the incident's causes, sequence of events, involvements and so forth. (Investigation management and case management are only available in the ICM and EIM editions of Perspective.)
Investigator	An investigator is a person assigned to work on the investigation of an incident (or of a case linked to one or more incidents). Within Perspective, users designated as investigators are permitted access to investigation forms, tabs and functions. (Investigation management and case management are only available in the ICM and EIM editions of Perspective.)

Link	A link is a connection to a specific file, form or program level.
Listing Pane	The Listing pane is the area of Perspective where users view lists of records available for selection; the record entity displayed depends on the selection made in the Navigation pane. The Listing pane is located in the middle of the screen, between the Navigation pane and the Viewing pane.
Lookup List	See “Drop-down”.
Narrative	A narrative is the story, explanation or summary of an event.
Navigation Pane	The Navigation pane is the area of Perspective where users navigate to major program components (e.g., the Dashboard, Data Forms, Analysis Expert, etc.), and, to some extent, within the program components. The Navigation pane is located on the left side of the screen.
Net Loss	In Incident and Case records, the value determined by subtracting the Total Recovered amount (if any) from the Total Loss amount.
No Impact Loss	In Incident and Case records, any loss that has been associated with an incident that has either been prevented or remains a potential loss and, hence, does not impact the Net Loss amount.
Officer	An officer is a security personnel representative who can be dispatched and responds to activities created in Perspective DispatchLog.
Organization	In the context of Perspective, an organization is any agency, company or group.
Pane	A pane is an area within an on-screen window that contains specific type of information in form of interconnected files, fields, messages, banners, buttons, formulae, or other information. For example, Data Forms interface is expressed through the functionalities contained in the Navigation, Listing and Viewing panes.

Pick List	A pick list requires users to select an incident, item, person, organization or vehicle from a range of records displayed in a separate window. (In the ICM and EIM editions, case pick lists are also available.) If the desired entity does not appear in the pick list, some pick lists allow users to create a new entity record for selection. A pick list effectively links data entered in a field to an entity record. Click on the green Add icon on the right side of a pick list field to display a window containing a list of records for selection. Once a record is selected, the window will close and the pick list field will automatically populate with the record's name.
Pop-up	A pop-up is a window that opens automatically when a particular option is selected in the previous window.
Priority	The level of importance assigned to an incident, activity, email message (e.g., High, Low or Normal). The list of available priority levels can be set in the Administration component of Perspective.
Query	A query is a request for information. In Analysis Expert, when the Execute button is clicked, the program sends a message to the database where all information is stored, requesting results matching the query's specified criteria.
Quick Find	The Quick Find tool allows users to easily locate records containing a particular text string. Quick Find searches text fields across the Perspective database (such as summaries, narratives and text attachments) for the word or phrase specified, and returns a comprehensive list of records for review.
Radio Button	A radio button allows users to select one option out of a set of options. Before a radio button has been selected, it will look like an open circle, and after it is selected, a dot will appear inside the circle. Once a user has selected one radio button, selecting any other radio button in the same set will deselect the first option.
Record	A record is a subsection of database holding information about one entity or a member of a category within the database that is stored as one unit (e.g., an Incident, Activity, Item, Person etc. record).
Record View	A record view is a particular list of records that a user is permitted to access. In Perspective, users are able to create and save their own customized record views in the Data Forms component, allowing them to better organize and manage the records they need to view on an ongoing basis.

Recovery	In Incident and Case records, an entity that corresponds to a loss amount associated with an incident that has been restored or regained as a result of an action that had been implemented after the incident took place.
Ribbon	Formerly the Action Toolbar, the Ribbon in Perspective locates the most frequently used general administration, navigation, help and search tools and a search field for you to refer to sections of the integrated Help files. In the Data Forms component, the Visual Analysis icon is added that assists in visual representation of relationships between the records stored in the Perspective's database. In the Analysis Expert component, the Ribbon is populated with an additional set of icons that perform saving, adding, cloning, deletion, sharing, and execution of queries.
Role	Every user is assigned to a role, which determines how much access the user has to Perspective's functions and components, and what he or she uses the program for. Examples of roles include Administrator, Investigator or General User. (The Investigator role is only available in the ICM and EIM editions of Perspective.)
Rollup	A rollup is also known as a multi-tier or hierarchical lookup list. Rollups are used to streamline the options and functions available to users making selections from related lookup lists. Each rollup has up to four tiers. The first tier is known as the Root; the option selected in this first tier determines what options are available in the second tier and so forth. A higher tier in the hierarchy is known as a Parent field and a lower tier is known as a Child field. Any Child fields that are on the same tier of the hierarchy are called Sibling fields.
Screen	A screen is a display of some portion of the program on your computer monitor. The term screen may be used to refer to the main program screen, a program form or a sub-form. (e.g., the Data Forms main screen, an Involved Item screen, the Analysis Expert screen, etc.).
Search	To search a database refers to the process by which the software program looks for data meeting the criteria specified by the user.
Server	A server is a computer that shares information with client computers in a network to help process a software program or application. The term server may refer to either the machine that shares the information or to a particular software program designed for this purpose.

Status Bar	The Status bar is a part of Perspective's interface that displays your system and login information, including your username, role name, as well as Perspective's system and connection statuses (e.g., Connected/ Disconnected). The Status bar is located at the bottom of the screen.
Subform	A subform is a sub-tabbed screen that contains child data, allowing you to enter a large amount of detailed information about an entity in an organized and coherent manner. A subform can only be accessed through its associated parent form. Like its parent form, the sub-form is designed to perform specific program functions (e.g., recording an involved person, registering a piece of evidence, etc.).
Sub-tab	A sub-tab is a tab that can only be accessed through a parent tab when navigating a form. For example, in the Incident form, the Involvements tab has four sub-tabs: Persons, Organizations, Vehicles and Items.
Supervisor	A supervisor is permitted to access the Controls tab on all records. Among other things, this allows the supervisor to change the workgroups, organizational rollups and access levels of records at will.
Tab	A tab in Perspective is used to mark a particular section within a data form. It looks like and operates like a tab in a file folder. To access the contents of a tab, users must simply click on the tab.
Table	A structure within a database designed for storing related information, often in the form of records or entity records. Simple databases may contain only one table; complex databases contain many.
Toolbar	A row of icons that activate functions or options when clicked. (e.g., The Ribbon).
Total Loss	In Incident and Case records, the sum value of all Loss amounts associated with an incident that corresponds to losses that actually took place.
User	A user is a person who uses Perspective, and has his or her own User Name and Password to access the program.
User Defined Field (UDF)	A UDF is a special field developed by an organization to meet their specific needs.
Value	A value is the specific information, or data, entered into a field.

Vehicle Identification Number (VIN)	VIN is a unique tracking number that serves to identify a vehicle.
Viewing Pane	The Viewing pane is the area of Perspective where users view record contents. (Depending on their user privileges, users may also be authorized to edit, delete or add records in the Viewing pane.) The record displayed in the Viewing pane depends on selections made in the Navigation pane and the Listing pane. The Viewing pane is located on the right side of the screen.
Window	A window is an enclosed rectangular on-screen viewing area that displays programs, files, fields, messages or Web sites independently of other on-screen areas.
Workgroup	A workgroup, in Perspective, segregates users by department, division, corporate level, region or any other criteria an organization wishes to use, and allows an organization to limit users' access to data. Users can only access records assigned to their respective workgroups.

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Contact Information

Consulting & Training

Toll Free:	1-888-PPM-9PPM (1-888-776-9776)
Phone:	(780) 448-0616
Fax:	(780) 448-0618
Email:	training@ppm2000.com

Technical Support

Toll Free:	1-877-776-2995
Phone:	(780) 448-0616
Email:	support@ppm2000.com

PPM 2000

Toll Free:	1-888-PPM-9PPM (1-888-776-9776)
Phone:	(780) 448-0616
Fax:	(780) 448-0618
Email:	information@ppm2000.com
Website:	http://www.ppm2000.com