:RESOLVER

PERSPECTIVE WEB PORTAL GUIDE

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Welcome to Perspective Web Portal

Welcome to Perspective Web Portal. Perspective not only records and tracks incident data, but also assesses and analyzes it to chart trends and report statistics. Web Portal complements Perspective with remote electronic reporting capabilities.

Remote electronic reporting saves data entry time, accelerates the investigative process, and gives every user the opportunity to quickly and efficiently report incidents. Web Portal widens the scope and effectiveness of Perspective without bringing on additional users and unnecessary expense.

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About Web Portal

Perspective Web Portal enables any user, on site, or in a distant location, to report an incident as soon as it occurs through the Web Portal webpage. Once an incident has been entered and submitted from Web Portal, it lands in the Perspective Gateway. Please refer to the **Perspective User's Guide** or Help file for further information on the assessment and review of reports submitted through Web Portal into the Gateway.

Additionally, Web Portal allows users to request an officer (requires Dispatching—available in the SOC and EIM editions of Perspective).

Finally, Web Portal provides users with a central place to view information, such as things and people to be on the lookout for (BOLOs), announcements, and links.

Note: All images were taken using Google Chrome version 31.0.1650.63 m. Updates to Google Chrome or Perspective Web Portal may result in slight discrepancies between the illustrations in this guide and what you may see on your screen.

Access the Web Portal

You can access the portal by clicking the **Portal** icon from the Perspective launch page. When you navigate to Web Portal, your browser displays the Web Portal homepage.

Figure 1.0: The Perspective launch page

From the Web Portal homepage, you can do the following:

1. Navigate to the Report an Incident page.
2. Navigate to the Request an Officer page.
3. View pertinent information. This information is organized into three different areas: BOLOs (Be on the Lookout), Announcements, and Links.

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User Interface

The Perspective Web Portal user interface is intuitive and designed to make reporting an incident as straightforward as possible. Additionally, you can request an officer, who will be dispatched through DispatchLog. There are a variety of other features of Web Portal, which are described in length below (Figure 1.1).

Figure 1.1: Web Portal homepage user interface

1. **Logo**: Administrators may change the Web Portal logo in Manage.

2. **Web Portal**: This area displays the Web Portal you are currently in. To view a list of all the public Web Portals you have access to, click the drop-down button.

3. **Login**: The only users who will need to, and have the access rights to log in to Web Portal are Administrators and Supervisors.

4. **Home**: Clicking the Home button will bring you back to the homepage.

5. **Default Message**: A message appears on the top of every Web Portal screen (Home, Report an Incident, Request an Officer), explaining what each page of Web Portal is designed to do, and instructs you on what tasks can be accomplished, and where. These messages are set by an Administrator.

6. **Report an Incident**: To report an incident or suspicious activity, click this button. On the Report an Incident page, you will be prompted to enter report details.

7. **Request an Officer**: To request an officer, click this button. Officers will be dispatched through Dispatching.

8. **BOLOs**: The BOLOs (Be on the Lookout) area is where thefts, stolen items, vandalized vehicles, etc. appear, so that you know what to be aware of.

9. **Previous** & **Next**: Previous and Next allows you to navigate through additional BOLOs.

10. **Announcements**: The Announcements area is where any upcoming events or changes will be posted.

11. **Links**: The Links area is typically used for internal websites, such as your company's website, events, and/or contact lists.

12. **Back to top**: Clicking this arrow will immediately bring you to the top of the page.

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Report an Incident

When an incident occurs in your workplace or on company property, use Perspective Web Portal to immediately notify the appropriate personnel within your organization, so that the situation can be resolved as soon as possible:

Note: The following example shows all fields set to visible.

Please refer to Figure 2.1 when going through the following steps.

1. Click the **Home** button .
2. Click the **Report an Incident** button.
3. Type your first name in the **First Name** field.
4. Type your last name in the **Last Name** field.
5. Type your phone number in the **Phone Number** field.
6. **Optional:** You may forego steps 3 - 6 and check the **Is Anonymous** box to report the incident anonymously.
7. Depending on your browser, you may select the **Date & Time of Incident** and the **Occurred To** dates in one of the following ways:

    a. **If you're using Internet Explorer or Firefox:** Click the text field and select the date from the pop-up calendar.

    b. **If you're using Chrome:**
        - Click on the month, day, and year fields, and change them by clicking the corresponding **up** and **down** arrows .
        - Click the **down** arrow and select the date from the pop-up calendar.
        - Type the date in the text field.

8. Input the **Occurred From Hour**, or use the arrows to select it.
9. Input the **Occurred From Minute**, or use the arrows to select it.
10. Input the **Occurred To Hour**, or use the arrows to select it.
11. Input the **Occurred To Minute**, or use the arrows to select it.
12. Identify the incident's **Class** from the drop-down menu.

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- Depending on the class you choose, more drop-down menus will appear, allowing you to narrow it down as necessary. These fields are hierarchical, meaning that the option selected in the first field determines the options that are available in the second field, and so on. The options that appear in these lists have been customized by your organization.

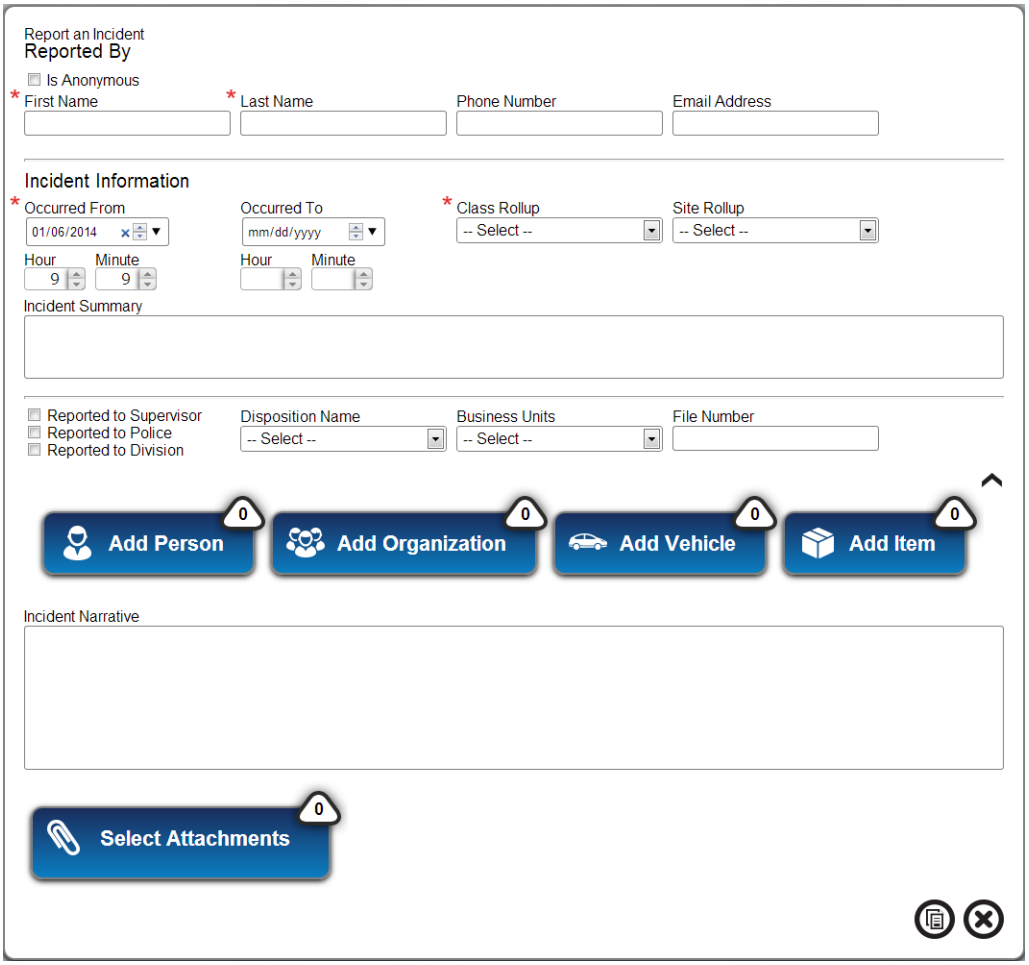

Figure 2.1: Report an Incident form

13. Identify the incident's **Site Rollup** from the drop-down menu.

    - Depending on the site rollup you choose, more drop-down menus will appear, allowing you to narrow it down as necessary. These fields are hierarchical, meaning that the option selected in the first field determines the options that are available in the second field, and so on. The options that appear in these lists have been customized by your organization.

14. Type a short summary in the **Incident Summary** field.

15. Click the **arrow** ⌄ on the right side of the form.

16. If the incident has been reported to a supervisor, check the **Reported To Supervisor** box.

    a. Type the supervisor's name in the **Supervisor Name** field.

b. Optionally, select the Disposition Name from the drop-down menu.

c. Optionally, select the Business Unit from the drop-down menu.

d. Optionally, input the file number in the File Number field.

17. If the incident has been reported to police, check the **Reported To Police** box.

    a. Type the police file number in the **Police File Number** field.

    b. Optionally, select the Disposition Name from the drop-down menu.

    c. Optionally, select the Business Unit from the drop-down menu.

    d. Optionally, input the file number in the File Number field.

18. If the incident has been reported to a division, check the **Reported to Division** box.

    a. Select the division from the **Division Name** drop-down menu.

    b. Optionally, select the Disposition Name from the drop-down menu.

    c. Optionally, select the Business Unit from the drop-down menu.

    d. Optionally, input the file number in the File Number field.

19. Click the **Add Person**, **Add Organization**, **Add Vehicle**, and/or **Add Item** button to add involvements.

20. Type a detailed narrative in the **Incident Narrative** field.

21. Click the **Select Attachments** button to add an attachment to the incident. You can add multiple attachments.

    - Web Portal supports the following file types as attachments: .jpg, .png, .doc, .docx, .pdf, .txt, .xls, .mp4, and .mp3.

22. Click the **Submit** button .

    - Required fields display with red asterisks * beside them. These fields must be filled out before the incident can be submitted. Failure to fill out required fields will result in an error message.

    - Once the incident has been submitted, you will be taken to a new page that tells you the incident was created successfully, and the incident number will be given to you. Two buttons are on this page, giving you the option to either add another incident , or to go to the Home screen .

Note: At any time, you may click the Cancel button . This will erase any data you have entered into the report and redirect you to the Home page.

Request an Officer

Please refer to Figure 3.1 when going through the following steps.

1. Click the **Home** button .
2. Click the **Request an Officer** button.
3. Type your first name in the **First Name** field.

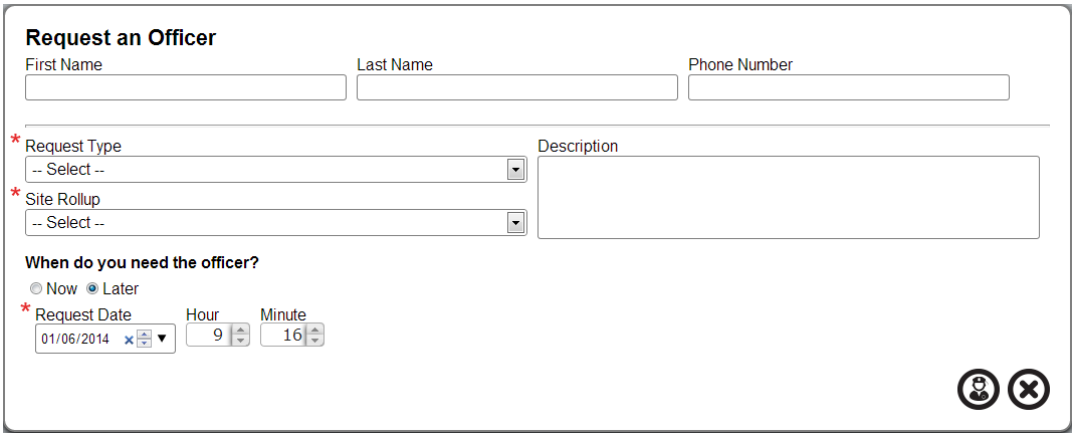

Figure 3.1: Request an Officer form

4. Type your last name in the **Last Name** field.
5. Type your phone number in the **Phone Number** field.
6. Select the reason you are requesting an officer from the **Request Type** drop-down menu.
7. Select your site rollup from the **Site Rollup** drop-down menu.
    - Depending on the site rollup you choose, more drop-down menus will appear, allowing you to narrow it down as necessary. These fields are hierarchical, meaning that the option selected in the first field determines the options that are available in the second field, and so on. The options that appear in these lists have been customized by your organization.
8. In the **Description** field, type any details about why you are requesting an officer, or what you may need from him/her.
9. Click **Now** if you need the officer right now.
10. Click **Later** if you'll need the officer at a later time:
    - Select a date you'll need the officer under the **Request Date** field:
        a. **If you're using Internet Explorer or Firefox:** Click the text field and select the date from the pop-up calendar.

b. **If you're using Chrome:**

- Click on the month, day, and year fields, and change them by clicking the corresponding **up** and **down** arrows.
- Click the **down** arrow and select the date from the pop-up calendar.
- Type the date in the text field.

- Select the exact time you'll need the officer by using the **up** and **down** arrows in the **Hour** and **Minute** fields.

11. Click the **Submit** button.

- Required fields display with red asterisks beside them. These fields must be filled out before the request can be submitted. Failure to fill out required fields will result in an error message.

- Once you have requested an officer, you will be taken to a new page that tells you that your submission was successful, and the activity number will be given to you. Two buttons are on this page, giving you the option to either request another officer, or to go to the Home screen

Note: At any time, you may click the Cancel button This will erase any data you have entered into the request form and redirect you to the Home page.

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Web Portal Setup

Administrators install and set up Web Portal so that other users are able to access the webpage and report incidents and/or request officers. Once the Administrator has set up the company's various workgroups, designated users can log in to their Web Portal.

Administrators

Users cannot access Web Portal until an Administrator has installed the service and set up workgroups. The following steps explain how to do this:

1. Open an Internet browser.
2. Navigate to your Web Portal Services URL:

   For On Premise customers: *https://**<servername>**/PerspectivePortal*. <servername> refers to the Perspective Web server installed during the installation of Perspective.

   For Hosted customers: *https://**<businessID>**.myincidents.com/webPortal*

   - The screen will notify you that the URL is no longer valid and that Web Portal is not set up (Figure 4.1).

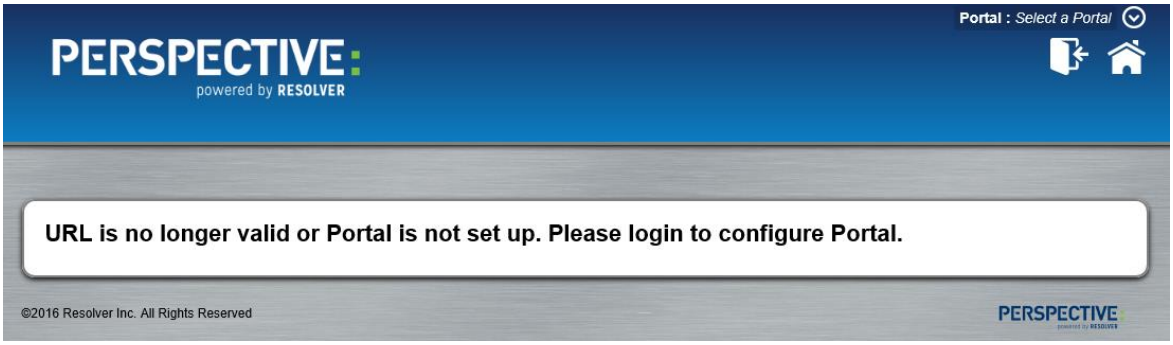

Figure 4.1: Setting up Web Portal

3. Click the **Login** button at the top right of your screen.
4. Enter the **Business ID**, **Database Name**, **User Name**, and **Password**.

   *Note: If you're an On Premise customer, your **Business ID** will be **default** and, if using your primary database, your **Database Name** will be **default**. If you're using a secondary database, your **Database Name** is the name of the database connection ID. For example, if you had a **training** database, the database name would be **training**.*

5. Click the **Login** button.

6. Click the **Manage** button .

7. Refer to the "Manage" chapter (pg. 14) for further instruction.

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Manage

Web Portal Administrators set up each workgroup.

1. Click the **Manage** button .
2. Select the workgroup you want to configure from the drop-down menu.
3. Type the workgroup key in the **Workgroup Key** field.

   Note: The Workgroup Key is configured in the Perspective Desktop Client. Refer to the "Specify Gateway File Import and/or e-Reporting Access Options for a Workgroup" section (pg. 75) in the Administrator's Guide for further instruction.

4. Click the **Validate Key** button. If the key is correct, the Manage components will display (Figure 5.1).

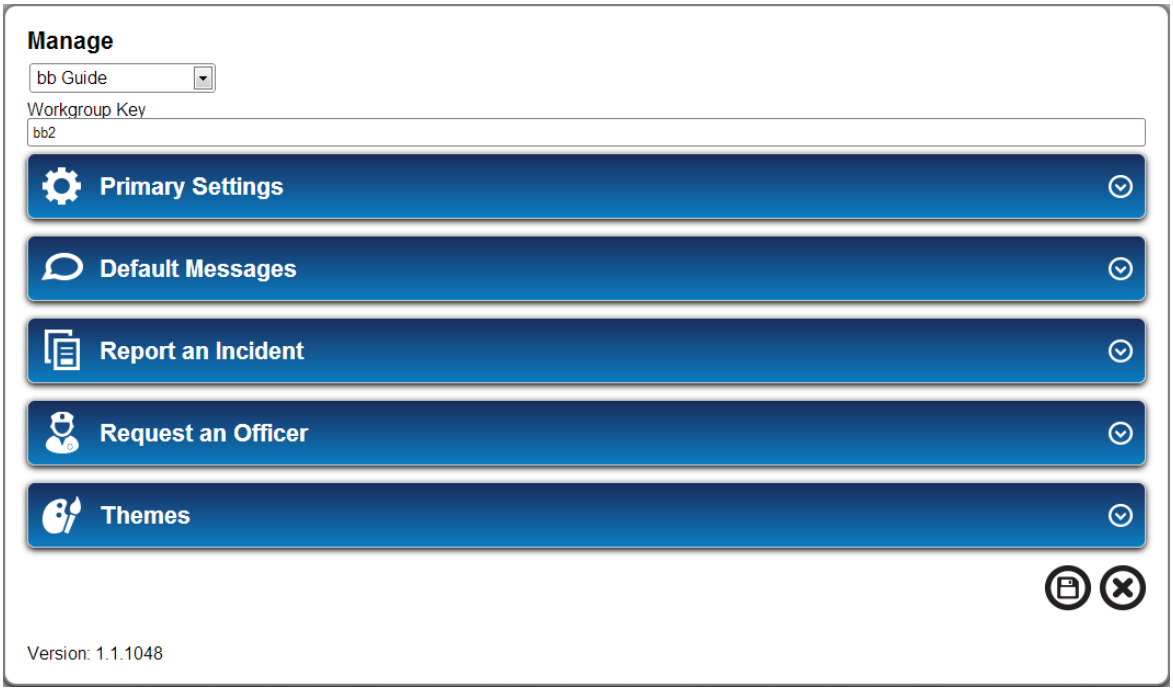

Figure 5.1: Setting up workgroups from the Manage page

Primary Settings

Please refer to Figure 5.2 when going through the following steps:

1. Click the **Manage** button .
2. Select the workgroup you want to configure from the drop-down menu.
3. Enter a title for the workgroup in the **Workgroup Title** field.
4. Only check boxes for the sections that you want visible to the workgroup: **Public Workgroup**, **Announcement Enabled**, **BOLO Enabled**, **Links Enabled**, and **Display Udfs**.
    - If the Public Workgroup box is checked, all users will be able to access that Web Portal from the drop-down menu on the main toolbar. If the Public Workgroup box is not checked, Administration will need to provide users with the Primary URL in order to access the Web Portal.
    - Any User Defined Fields (UDFs) that have been set up in Perspective will be carried over to Web Portal if the Display Udfs box is checked. UDFs will not display until you have clicked the Save button. *Note: Systems with several hundred UDFs displayed may cause Web Portal to operate at a slower speed than normal.*
5. You may decide to enable languages. This means that all labels will appear in the language you have chosen. To enable languages, click on the blank field, and select a language from the drop-down menu that appears.
6. Click the **Save** button to save your changes, or the **X** button to cancel your changes.

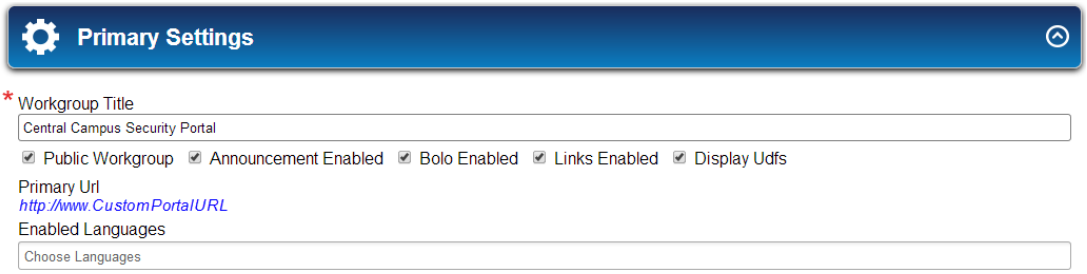

Figure 5.2: Primary Settings for workgroups in Web Portal

Note: The Workgroup URL is what you give to each workgroup in order for them to be able to access Web Portal. If languages have been enabled, an additional URL is available, which displays all labels in the set language. These URLs are unique to each workgroup.

Default Messages

Please refer to Figure 5.3 when going through the following steps:

1. Click the **Manage** button .
2. Select the workgroup you want to configure from the drop-down menu.
3. Expand Default Messages by clicking the **expansion** button .
4. Enable languages by clicking in the Enabled Languages field and selecting a language, or skip this step to leave it as Default.
5. Enter a **Web Portal Message**. This message displays at the top of the homepage, and can be used to direct users on how to navigate Web Portal.
6. Enter a **Report an Incident Message**. This message displays at the top of the report an incident page, and can be used to remind users to fill out all required fields, to notify them that there will be a follow-up to their report, etc.
7. Enter a **Request an Officer Message**. This message displays at the top of the request an officer page and can be used to remind users to fill out certain fields when requesting an officer, or perhaps to list an emergency contact number.
8. Click the **Save** button at the bottom of your page to save your changes, or the **X** button to cancel your changes.

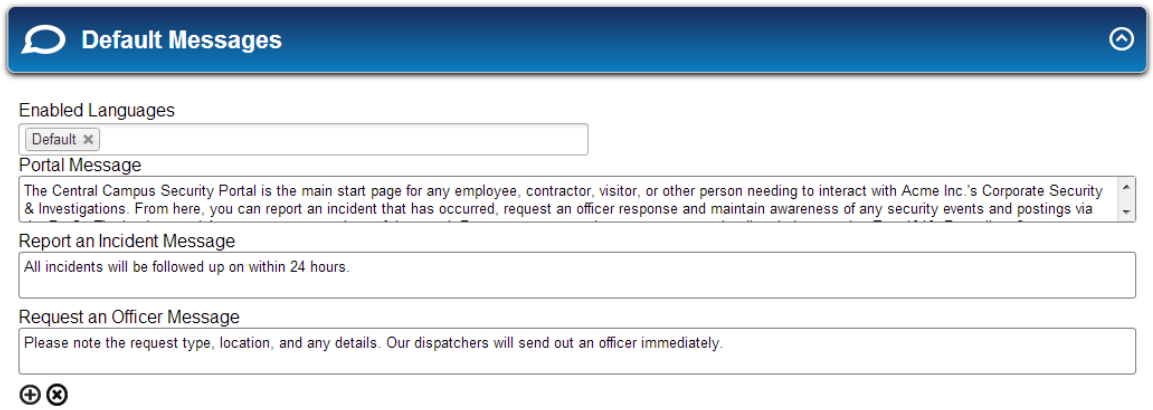

Figure 5.3: Setting the Default Messages in Web Portal

Report an Incident

Please refer to Figure 5.4 when going through the following steps:

1. Click the **Manage** button .
2. Select the workgroup you want to configure from the drop-down menu.
3. Expand Report an Incident by clicking the **expansion** button .
4. By default, the Report e-Incident enabled box is checked. If you do not want your users to be able to report an incident from Web Portal, deselect the box.
5. By default, the field privileges boxes are checked on Visible. To hide a field from a workgroup, deselect the **Visible** box.
6. If you want an incident field to be required, check the corresponding **Required** box. A field must be visible for it to be a required field.
7. Repeat steps 5 and 6 for the Involved Person, Involved Item, Involved Organization, and Involved Vehicle field privileges.
8. Click the **Save** button at the bottom of your page to save your changes, or the **X** button to cancel your changes.

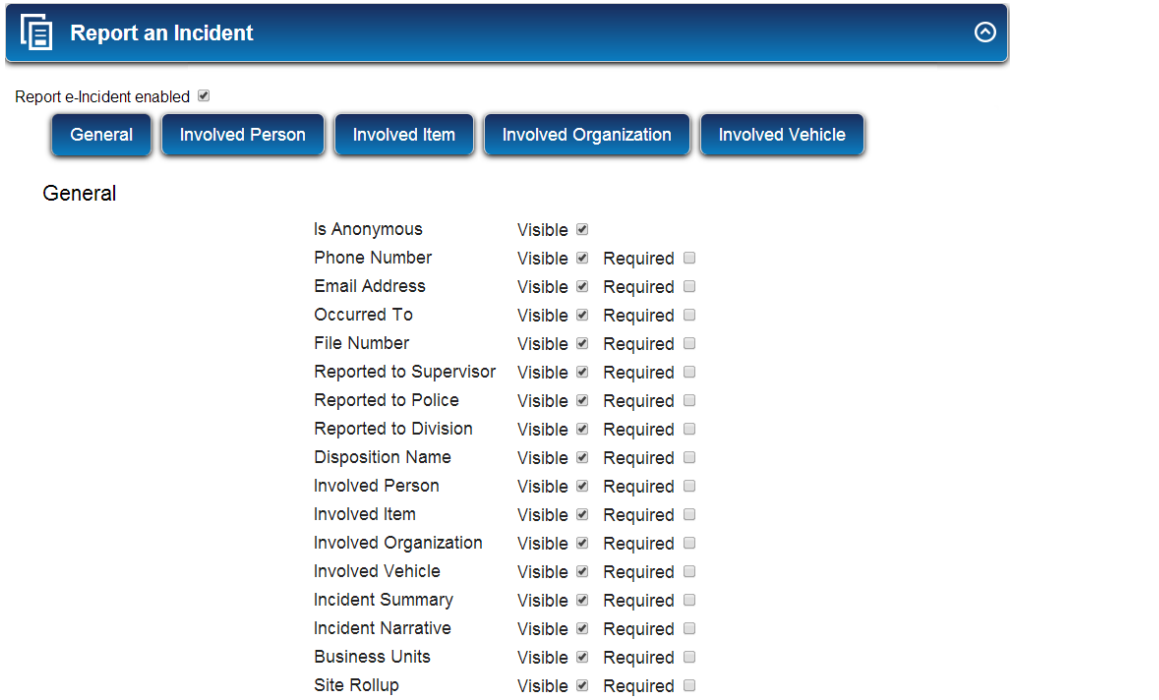

Figure 5.4: Determining which fields will be visible for users when reporting an incident

Request an Officer

Note: This feature should only be used by those who have the Perspective SOC or EIM edition. If you are not using Dispatch, Resolver recommends you do not use this form.

Please refer to Figure 5.5 when going through the following steps:

1. Click the **Manage** button .
2. Select the workgroup you want to configure from the drop-down menu.
3. Expand Request an Officer by clicking the **expansion** button .
4. By default, the Request an officer enabled box is checked. If you do not want your users to be able to request an officer from Web Portal, deselect the box.
5. By default, First Name, Last Name, Phone Number, and Description are set to visible. This means that whoever requests an officer has the option to fill out their personal information, but do not have to do so. To hide a field from a workgroup, deselect the Visible box.
6. If you want an activity field to be required, check the corresponding Required box. A field must be visible for it to be a required field.
7. Choose the Call Source you want all Request an Officer forms to be associated with. This information gets sent to Perspective's DispatchLog, and lets dispatchers know the call came from Web Portal.
8. Choose the Call Category that you want the workgroup to report on from the drop-down menu.
9. Based on the Call Category that you have selected for the workgroup, enter an alias in the Request Type field. The alias is what users will see when requesting an officer in Web Portal.

   Note: Call Category is only available in the drop-down menu if a Priority is set in the Perspective Desktop Client.

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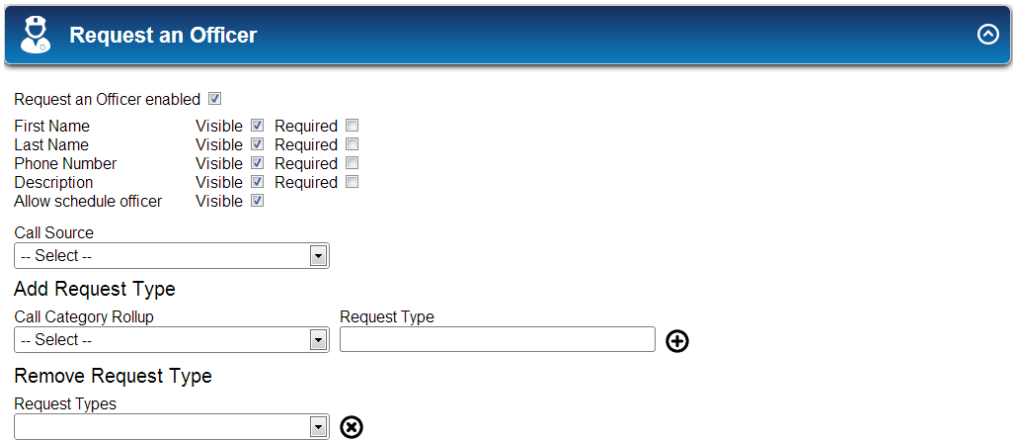

Figure 5.5: Determining which fields will be visible to users when requesting an officer

10. To add a request type, click the **add** button ⊕.
11. Repeat steps 7-9 for additional Request Types.
12. To remove a request type, click the **X** button ⊗.
13. Click the **Save** button ⊜ at the bottom of your page to save your changes, or the **X** button ⊗ to cancel your changes.

Themes

Please refer to Figure 5.6 when going through the following steps:

1. Click the **Manage** button ⚙.
2. Select the workgroup you want to configure from the drop-down menu.
3. Expand Themes by clicking the **expansion** button ⌄.
4. To change the logo that appears at the top of the Web Portal screen, click the **Choose File** button.
5. Browse to the location of your file, and click **Open**.
6. Click the color boxes under **Gradient Top** and **Gradient Bottom** to select the gradient colors.

   *Warning: Because some text within the portal is white by default and cannot be changed, it's recommended you avoid using white as both the **Gradient Top** and **Gradient Bottom** colors as this will cause the white text to become unreadable.*
7. Click the color box under **Background** or the Image button, depending on what you want your Web Portal background to display.

a. To change the color of your background, click the box that displays the current background color and select the new background color you want to use.

b. To change the background of your Web Portal screen, click the **Choose File** button.

- Browse to the location of your file, and click **Open**.

8. Under Fonts, click the arrow to open the drop-down menu.
9. Select the font you want you want to use.
10. Under Header Font Color, click the arrow to open the drop-down menu.
11. Select the header font color you want to use.
12. Under Footer Font Color, click the arrow to open the drop-down menu.
13. Select the footer font color you want to use.
14. Under Corners, click the arrow to open the drop-down menu.
15. Select the corners you want on your forms and buttons.
16. Under Shadow, click the arrow to open the drop-down menu.
17. Select the shadow you want to appear around your forms and buttons.
18. Under Border, click the arrow to open the drop-down menu.
19. Select the border you want to appear around your forms and buttons.
20. Click the **Reset** button to reset your theme back to the original, click the **Save** button at the bottom of your page to save your changes, or click the **X** button to cancel all changes made in the Manage section.

Note: A preview of what your changes will look like is displayed on the right side of your screen.

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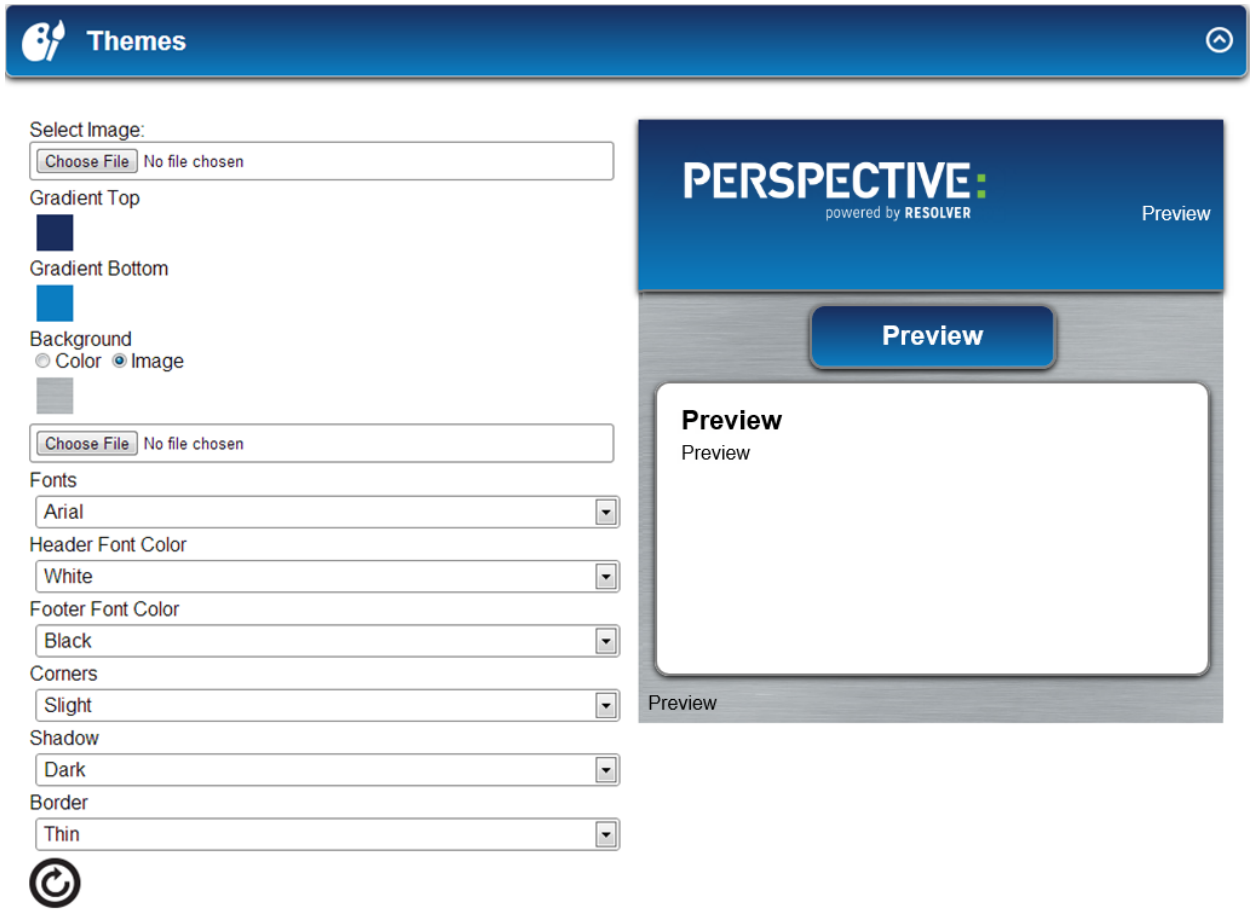

Figure 5.6: Modifying the Web Portal appearance

BOLOs, Announcements, and Links

Only those with Administrator rights can add, edit, or delete BOLOs, Announcements, and Links.

1. **BOLOs**: The BOLOs (Be on the Lookout) area is where thefts, stolen items, vandalized vehicles, etc. appear, so that those using Web Portal know what to be aware of.
2. **Announcements**: The Announcements area is where any upcoming events or changes can be posted.
3. **Links**: The Links area is used for internal websites, such as your company's website, events, and/or contact lists.

Add BOLOs

Please refer to Figure 6.2 when going through the following steps:

1. Click the **Home** button .
2. Click the **plus** button on the bottom right of the **Announcements** area.
3. Select **BOLO** from the **Announcement Type** drop-down menu.
4. Enter a title for your BOLO in the **Title** field.
5. Optionally, you can enter a link in the **Link** field.
6. Enter the message you want displayed in the **Message** field.
7. Optionally, you can upload an image to be displayed with the BOLO announcement.
8. Depending on your browser, you may select the **Expiry Date** (the date you no longer want the BOLO to be displayed) in one of the following ways:

    a. **If you're using Internet Explorer or Firefox:** Click the text field and select the date from the pop-up calendar.

    b. **If you're using Chrome:**

    - Click on the month, day, and year fields, and change them by clicking the corresponding **up** and **down** arrows .
    - Click the **down** arrow and select the date from the pop-up calendar.
    - Type the date in the text field.

9. Select the workgroups you want the announcement to be visible to by clicking the **Announcement Visible to Workgroups** field and selecting the workgroups from the drop-down menu.

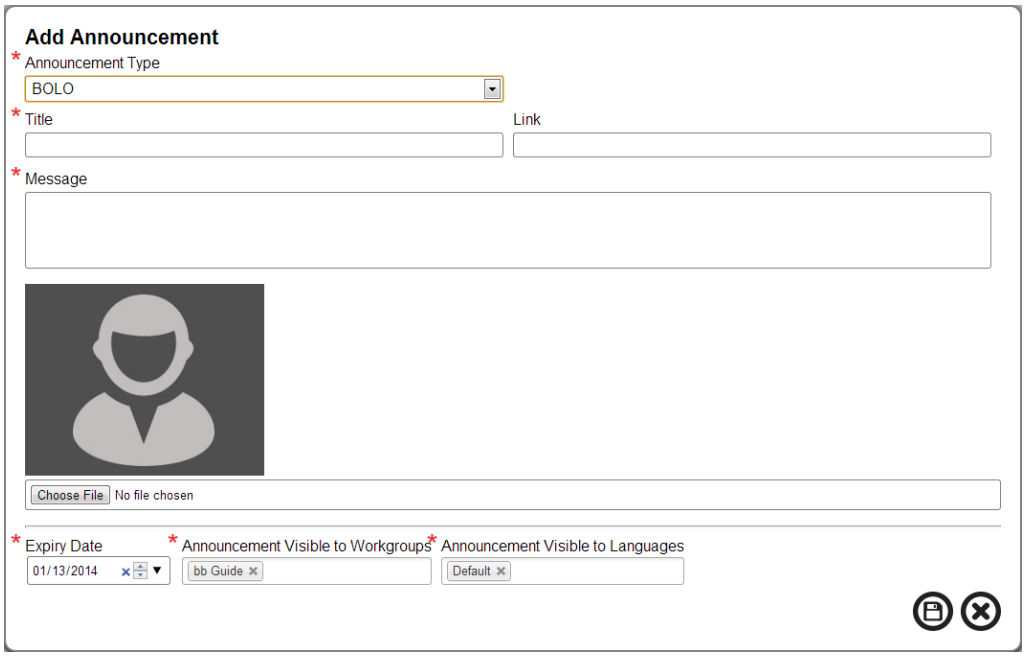

Figure 6.2: Adding a BOLO

10. Select the languages you want the announcement to be available in by clicking the **Announcement Visible to Languages** field and selecting the languages from the drop-down menu.

11. Click the **Submit** button.

- Required fields display with red asterisks * beside them. These fields must be filled out before the BOLO can be submitted. Failure to fill out required fields will result in an error message.

- Once your BOLO has been submitted, you will be taken to a new page that gives you the option to either add another BOLO, or to go to the Home screen.

Note: At any time, you may click the Cancel button. This will erase any data you have entered into the BOLOs area and redirect you to the Home page.

Add Announcements

Please refer to Figure 6.1 when going through the following steps:

1. Click the **Home** button.

2. Click the **plus** button on the bottom right of the Announcements area.

3. Make sure **Announcement** is selected from the Announcement Type drop-down menu.
4. Enter a title for your Announcement in the **Title** field.
5. Optionally, you can enter a link in the **Link** field.
6. Enter the message you want displayed in the **Message** field.

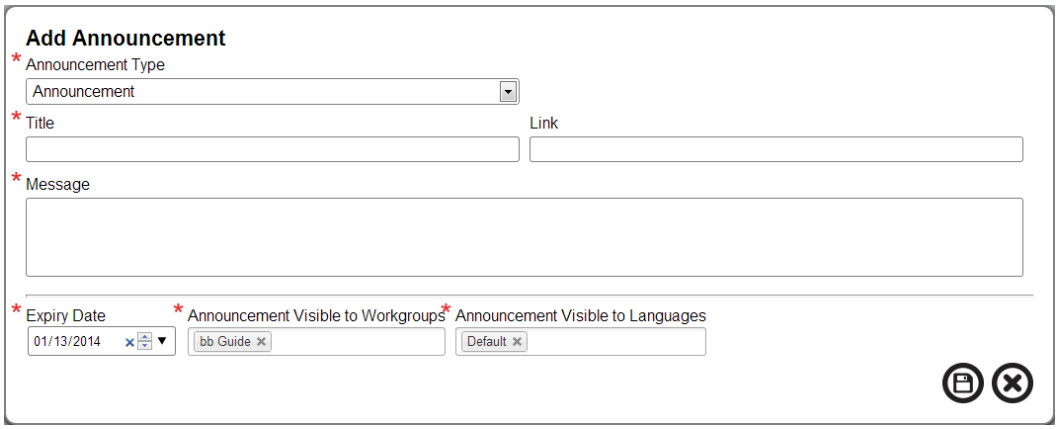

Figure 6.1: Adding an Announcement

7. Depending on your browser, you may select the **Expiry Date** (the date you no longer want the Announcement to be displayed) in one of the following ways:

    a. **If you're using Internet Explorer or Firefox:** Click the text field and select the date from the pop-up calendar.

    b. **If you're using Chrome:**

    - Click on the month, day, and year fields, and change them by clicking the corresponding **up** and **down** arrows.
    - Click the **down** arrow and select the date from the pop-up calendar.
    - Type the date in the text field.

8. Select the workgroups you want the announcement to be visible to by clicking the **Announcement Visible to Workgroups** field and selecting the workgroups from the drop-down menu.
9. Select the languages you want the announcement to be available in by clicking the **Announcement Visible to Languages** field and selecting the languages from the drop-down menu.
10. Click the **Submit** button.

12. Required fields display with red asterisks * beside them. These fields must be filled out before the announcement can be submitted. Failure to fill out required fields will result in an error message.

13. Once your announcement has been submitted, you will be taken to a new page that gives you the option to either add another announcement ⊕, or to go to the Home screen ⌂.

*Note: At any time, you may click the **Cancel** button ⊗. This will erase any data you have entered into the Announcements area and redirect you to the Home page.*

Add Links

Please refer to Figure 6.3 when going through the following steps:

1. Click the **Home** button .
2. Click the **plus** button ⊕ on the bottom right of the Links area.
3. Make sure **Links** is selected from the Announcement Type drop-down menu.
4. Enter a title for your Link in the **Title** field.
5. Enter a link in the **Link** field.
6. Optionally, you can enter a message to be displayed under the link.
7. Depending on your browser, you may select the **Expiry Date** (the date you no longer want the Link to be displayed) in one of the following ways:

    a. **If you're using Internet Explorer or Firefox:** Click the text field and select the date from the pop-up calendar.

    b. **If you're using Chrome:**

    - Click on the month, day, and year fields, and change them by clicking the corresponding **up** and **down** arrows .
    - Click the **down** arrow ▼ and select the date from the pop-up calendar.
    - Type the date in the text field.

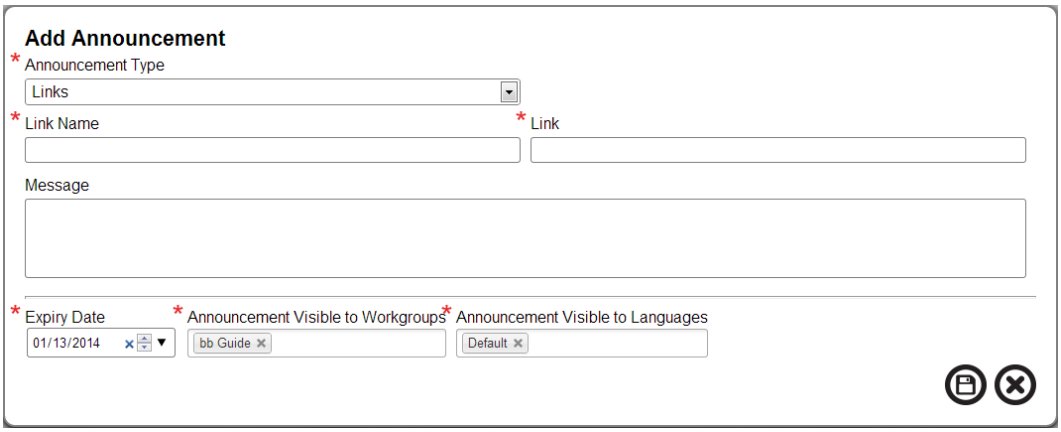

Figure 6.3: Adding a Link

8. Select the workgroups you want the announcement to be visible to by clicking the **Announcement Visible to Workgroups** field and selecting the workgroups from the drop-down menu.

9. Select the languages you want the announcement to be available in by clicking the **Announcement Visible to Languages** field and selecting the languages from the drop-down menu.

10. Click the **Submit** button.

    14. Required fields display with red asterisks * beside them. These fields must be filled out before the link can be submitted. Failure to fill out required fields will result in an error message.

    15. Once your link has been submitted, you will be taken to a new page that gives you the option to either add another link, or to go to the Home screen.

Note: At any time, you may click the Cancel button. This will erase any data you have entered into the Links area and redirect you to the Home page.

Edit Announcements, BOLOs, and Links

1. Click the **Home** button.

2. Click the **Edit** button to edit an announcement, BOLO, or link.

3. Make your changes.

4. Click the **Submit** button.

    16. Required fields display with red asterisks * beside them. These fields must be filled out before the incident can be submitted. Failure to fill out required fields will result in an error message.

Note: At any time, you may click the Cancel button ⊗. This will erase any data you have entered into the Announcements, BOLOs, or Links area and redirect you to the Home page.

Delete Announcements, BOLOs, and Links

1. Click the **Home** button .
2. Click the **delete** button ⊗ to delete an announcement, BOLO, or link.

Glossary

Administrator	An Administrator sets up Perspective Web Portal, 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.
Announcements	The Announcements area of Web Portal is where any upcoming events or changes will be posted. It appears on the homepage of Web Portal.
BOLOs	The BOLOs (Be on the Lookout) area of Web Portal is where thefts, stolen items, vandalized vehicles, etc. appear, so that those using Web Portal know what to be aware of. It appears on the homepage of Web Portal.
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.
Field	A field is an element within a form that allows you to enter or access a specific piece of information related to the record type. One field might be "First Name".
Home	Home refers to the main screen of Web Portal. From Home, you access Report an Incident, Request an Officer, Announcements, BOLOs, and Links.
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 Web Portal refers to the visual on-screen means by which Perspective components communicate with the user to allow for a seamless entry, display, analysis, and transfer of data.
Links	The Links area of Web Portal is used for internal websites, such as your company's website, events, and/or contact lists. It appears on the homepage of Web Portal.

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Workgroup	A workgroup, in Perspective, segregates users by department, division, corporate level, region, or any other criteria an organization wants to use, and allows an organization to limit users' access to data. Administrators set up workgroups in Web Portal.

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