# **RESOLVER** PERSPECTIVE ADMINISTRATOR'S GUIDE Version 5.8.2

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#### Perspective by Resolver Inc.™

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## **Perspective Editions**

The chart below summarizes the Perspective features available by edition. For more information on the edition you're currently running, check your licensing.

	Essentials	Professional	Enterprise
Features			
Activity Reporting	$\checkmark$	$\checkmark$	
Incident Reporting	$\checkmark$	$\checkmark$	$\checkmark$
Dispatch		$\checkmark$	$\checkmark$
Investigation & Case Management		$\checkmark$	$\checkmark$
Visual Analysis	$\checkmark$	$\checkmark$	$\checkmark$
Reporting, Trending & Analysis Tools	$\checkmark$	$\checkmark$	$\checkmark$
Track losses and financial impact	$\checkmark$	$\checkmark$	$\checkmark$
Report incidents in a Web Portal	$\checkmark$	$\checkmark$	$\checkmark$
View metrics with a configurable Dashboard	$\checkmark$	$\checkmark$	$\checkmark$
Google-like search	$\checkmark$	$\checkmark$	$\checkmark$
Visualize information on a map	$\checkmark$	$\checkmark$	$\checkmark$
iOS App	$\checkmark$	$\checkmark$	$\checkmark$
System configuration	$\checkmark$	$\checkmark$	$\checkmark$
Workflows	$\checkmark$	$\checkmark$	$\checkmark$
Open API	$\checkmark$	$\checkmark$	$\checkmark$
Officer Mobile		√*	√*
Single Sign On			$\checkmark$
IP Whitelisting			$\checkmark$

\*Opt In for Additional Cost

## Welcome to Perspective by Resolver

Welcome to Perspective by Resolver<sup>™</sup>, the industry leader in Incident Reporting and Investigation Management software.

Perspective not only records and tracks incident data, but also assesses and analyzes it to chart trends and report statistics. With the recent incorporation of the centralized dispatching tool Perspective Dispatch, Perspective now also offers an extensive range of dispatching capabilities.

This guide outlines the options and settings available in the **Administration** component of Perspective only, and is developed primarily for designated Perspective Administrators. For information about other components see the **Resolver Support** site.

## Default Admin Master vs. Users with Administrator Rights

There are differences between the default Admin Master account and a Perspective User with Administrator rights. Specifically, the Admin Master has select features available that other Users, even with Administrator rights, do not.

However, the default Admin Master **can only access the Administration** and **Dashboard panels of Perspective**. Other components are unavailable to the Admin Master.

## **Logon Options**

- 1. Ensure Compatibility View is turned off in Internet Explorer:
  - a. Click the gear icon in the top right of the browser.
  - b. Click Compatibility View Settings.
  - c. Ensure the **Display intranet sites in Compatibility View** checkbox is unchecked.
  - d. Click Close.

Compatibility View Settings		×
Change Compatibility View Settings		
Add this website:		
resolver.com	Add	
Websites you've added to Compatibility View:		
	Remove	
Display intranet sites in Compatibility View		
✓ Use Microsoft compatibility lists		
Learn more by reading the Internet Explorer privacy	statement	
	Close	

- 2. Navigate to your Perspective Services URL:
  - For On Premise customers: https://<servername>/PerspectiveServices. <servername> refers to the Perspective Web server installed during the installation of Perspective.
  - For Hosted customers: https://<businessID>.myincidents.com/perspective/
- 3. Click the **Perspective** icon.



- 4. If launching Perspective for the first time:
  - a. Click **Run** in the **Security Warning** window.
  - b. Configure your login settings:
    - For On Premise customers:
      - i. Click the **Specify Server** tab, if it's not already open.
      - ii. If needed, enter the Perspective Services URL (e.g. https://<servername>/PerspectiveServices) in the Service Folder field.
      - iii. If your business ID is different from **default**, enter it in the **Business ID** field.

Note: The 😌 icon indicates that valid information has not yet been entered into mandatory fields. When the required information has been validated, the 🕑 will appear next to the fields.

PERSPECTIV powered by RESOL	 Back	Cancel
MyIncidents.com	Specify Server	
Service URL		
https://example/perspectiveservices		<b>Ø</b>
Business ID		
DEFAULT		<b>2</b>
Database		
Default		<b>~</b>
✓ Use Default Proxy		

iv. Select the database from the **Database Name** dropdown menu.

v. Click **Back** to return to the previous screen.

#### • For Hosted customers:

- i. Click the **MyIncidents.com** tab.
- ii. Confirm the database selected in the **Database Name** dropdown is correct.

Specify Server	
	¥

iii. Click **Gack** to return to the previous screen.

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Note: If the **Database Name** field is missing or login fails, click the **Specify Server** tab to confirm the **Service URL**, **Business ID**, and **Database** fields have populated correctly.

5. Enter your login credentials:

Note: If your system uses Windows authentication, the login will be performed automatically. To switch back to the standard Perspective login, press the F5 key on your keyboard.

a. If you're **not** logging in using single sign-on (SSO) authentication:

	ECTIVE: powered by RESOLVER	Settings
5.1		
User Name		
Password		Login
Remember Me		

i. Enter your user name and password in the **User Name** and **Password** fields.

- ii. Select the **Remember Me** checkbox if you want Perspective to remember your user name.
- iii. Click Login.
- b. If you're logging in using single sign-on (SSO) authentication:
  - i. Click Login.



ii. Enter your username, password, and any other information required by your SSO provider to complete the login process. The SSO settings, including the amount of time your session remains active, are determined by the SSO provider selected by your Perspective administrator.

Note: If both SSO and Perspective authentication are enabled on your system and you want to log in using your Perspective credentials, click **Login with Perspective**, then enter your user name and password. This option will only appear on the login screen if both Perspective and SSO authentication were enabled at the time of installation or update.

## Logoff

If you've logged in using single sign-on (SSO) authentication, clicking the **X** at the top right of the screen will not log you out of Perspective, Dispatch, Dashboard, and/or Web Portal. To end your SSO session, click Logoff in the ribbon.

## **Navigation Options**

To start modifying administrative settings, you must first open the **Administration** module on the Navigation pane. By default, the General Settings form will be displayed with the General tab open. Then, select a **component** (e.g., Administration) or a **sub-component** (e.g., Roles) of the program administration that you would like to modify from the menu on the left hand side. The relevant settings and/or fields available for viewing or editing will be displayed in the Visualization pane on the right. Most of the interface components of the Administration module are equipped with a toolbar that enables the convenient navigation and modification of the administrative settings. Each administrative toolbar includes a number of functions from the list below.

🛃 Save	Preserves your changes to the entity. Complete every editing action with saving the changes applied to the record by clicking Save on the toolbar.
📝 Edit	Modifies the entity. After clicking Edit, select the entity you wish to edit and make the necessary change.
🖶 Add	Creates a new entity from scratch.
🗙 Delete	Deletes an entire entity. In the confirmation window that pops up, click Yes.
😧 Cancel	Cancels the changes made to an edited setting.
参 Refresh	Displays the saved changes made to an administrative setting.

## **Security Layer Overview**

Perspective provides for a high level of information security. Its unique security layers give you the flexibility to segregate and consolidate vast amounts of data while controlling data visibility through a sophisticated system of workgroups, organizational rollups and access levels, combined with field and function level security.

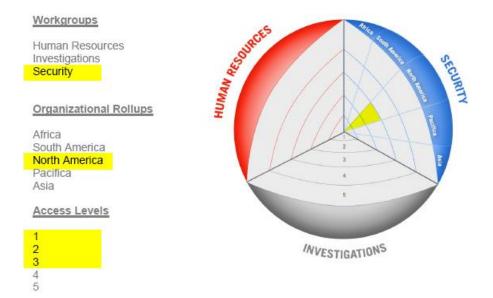
Your security layer set-up begins with segregating your data by:

- Workgroup: Every record is assigned to one or more workgroups. These workgroups may be based on department, location, corporate level, division or some other structural element of your organization. For example, if your organization chooses to base its workgroup set-up on its departments, sample workgroups could be Human Resources, Investigations, or Security.
- **Organizational Rollup**: Each record may also be assigned an organizational rollup of up to four tiers. Organizational rollups allow you to further compartmentalize data by subdividing workgroups. For

example, if you need to segregate data by department and by region, you could establish a workgroup for each department and add organizational rollups that reflect your company's geographic locations (e.g., Africa, Asia, Europe, South America). A four-tier organizational rollup could include continent as the first tier, country as the second, state or province as the third and city as the fourth.

• Access Level: Every record is also assigned one of five access levels with Level 1 designating records that are unclassified and Level 5 marking data that is extremely confidential.

Just as every record in Perspective is designated an access level, organizational rollup and one or more workgroups, all users in Perspective are similarly assigned these security protocols. Users may only view records that fall within the parameters of their access rights. For example, in the following illustration, the user represented by the yellow highlighting is only able to access records assigned to the Security workgroup and the North America organizational rollup, with an access level of 3 or less.



User visibility may be even further refined with field and function level security. While workgroups, organizational rollups and access levels specify which records a user is able to access, field and function level security options go a step further to specify precisely which sections of a record a user can see (forms, sub-forms and fields), as well as what they are permitted to do with this data (read, add, edit and/or delete).

Within Perspective, user visibility and access rights are assigned at the:

• System Level: Default access rights (or privileges) are first applied to all users across the system.

- **Role Level**: Default access rights (or privileges) are inherited from the System level and can then be modified for each role.
- **User level**: Access rights (or privileges) are inherited from the Role level and can then be customized for each user.

## System Administration Components

#### General Settings

#### General

- Assign Incident, Case, and Activity Number formats/prefixes.
- Choose the default measurement system for numeric data.
- Set your organization's logo and address to print on report cover pages.
- Select the default font for narratives, summaries and interviews.
- Set to display your organization's privacy statement or legal notice upon logon.
- Hide the All Records View option on data forms and pick lists.
- Allow users to send formatted email messages.

#### Account Usage Policies

• Define user password and logon parameters.

#### Currencies

• Select the system's default currency, add new currencies and update exchange rates.

#### Languages

• Enter new custom languages or label sets into the system.

#### Administration

#### Workgroups

- Add a new workgroup.
- Specify a workgroup's Gateway import parameters and identifier prefixes.

#### System Privileges

- Assign system-level visibility and access rights.
- View discrepancies between system-level rights and role or user rights.

#### Roles

- Create a new role.
- Establish default security controls, language and currency for a role.
- Select general role rights.
- Specify visibility and access privileges for a role.
- Set report visibility for a role.
- View discrepancies between role and user rights and report visibility.

#### Users

- Create a new user for Perspective or Dispatch.
- Establish default security controls, language and currency for a user.
- Set general user rights.
- Specify visibility and access privileges for a user.
- Set report visibility for a user.
- Track all changes made to a user account.

#### Officers

- Create a new officer for Perspective DispatchLog<sup>™</sup>.
- Lock an officer from displaying in Perspective or Perspective DispatchLog.

#### Auditing

- View when, where and who accessed or modified a record.
- Enable or disable general and read auditing (Admin Master authority).
- Specify retention period for audit data (Admin Master authority).
- Choose to purge all audit data (Admin Master authority).

#### Lookups

Modify a single-tier, multi-tier or hierarchical lookup list.

- Specify workgroup visibility for a lookup list.
- Enter call codes for the Call Category lookup list.
- Enter address information to the Site lookup list.
- Add running text to the Site lookup list for display in Perspective DispatchLog.

#### Flags

• Create a new incident or person flag.

#### Standard Operating Procedures (SOP)

- Create a new Standard Operating Procedure rule restricting it to specific call category, site specifications and/or activity status.
- Include the necessary description, checklist, attachments and links.
- Create the relevant notification message and specify the email addresses for their delivery.
- Specify the notification type for mass notifications sent via MIR3<sup>™</sup> inEnterprise<sup>™</sup>.

#### Visual Alerts

- Define the visual representation (i.e., the font and the background color) for the fields that differentiate various Officer Teams, Officer Statuses, Organization Statuses, Priorities and Locations.
- Create Regulated Time to Act (RTA) alerts for activities in Perspective DispatchLog.
- Create Officer Alerts for officers in Perspective DispatchLog whose Status or Site change.

#### Language

#### Languages

- Set custom languages.
- Define custom web help paths.
- Assign dictionaries.

#### Form Labels

- Create a default label set for all users.
- Create a custom label set for each custom language.

- Create a custom report footer.
- Edit default report titles and labels.

#### License Management

#### **Concurrent Licenses**

- Displays a list of all users currently logged in to Perspective.
- Lets you know the maximum number of concurrent logins available to you.
- You can end sessions.
- Displays active services.

#### Named Licenses

- Assign licenses or use the Auto Assign option.
- Displays a list of all users currently logged in to Perspective.
- Displays active services.

# **General Settings**

## Set the Basic System Settings

All basic administration settings are located under the **General** tab of the General Settings section that opens by default as you open the Administration component.

#### Assign Incident, Case, and Activity Number Formats and Prefixes

- 1. Enter a prefix for all Incident Numbers, Case Numbers and Activity Numbers. If you would prefer not to have a prefix for a specific number type, leave the corresponding fields blank.
- 2. Choose **Identifier Formats** for Incident, Case, and Activity records from the corresponding lookup lists:
  - CCYY-MM-#####: This format identifies the record by the calendar year (CCYY) and month (MM) that it was added to Perspective, followed by a five digit sequential number that re-sets at the beginning of each month. For example, 2011-04-00123 identifies the 123<sup>rd</sup> incident/case/activity entered in Perspective in April 2011.
  - CCYY-######: This format identifies the record by the calendar year (CCYY) that it was added to Perspective, followed by a six digit sequential number that re-sets at the beginning of each year. For example, 2011-004567 identifies the 4567<sup>th</sup> incident/case/activity entered in Perspective in 2011.
  - ##########: This is known as flat file format. There is no year or month preceding the number. The first record entered in Perspective will be identified by the number 000000001, and this sequential numbering will continue indefinitely with no re-set.

NOTE: Identifier Prefixes are recorded and reset in GMT time.

#### **Choose the Default Measurement System for Numeric Data**

Under **Default Measurement System**, choose **Metric** or **Standard** as the default system for entering numeric data, such as a person's Height, Weight, etc. Note that this setting can be overridden in individual user accounts.



#### Set your organization's logo and address to print on report cover pages

- 1. Click the Add icon 🐈 in the **Organization** field. A pop-up Entity List window will open.
- 2. Select the name of a company whose Organization record contains the logo and address you wish to place on report cover pages. If an Organization record does not already exist for your company, use the Quick Add function at the bottom of the pick list to create one, ensuring that you add your company's logo and address to the new record.

Note: Only the primary address will be displayed on the report cover pages, so ensure that the address that you want displayed is set to primary.

Note: This selection may be overridden by choosing a different organization at the workgroup and/or User levels.

#### Select the Default Font for Narratives, Summaries, and Interviews

- 1. Under **Default Font**, click the Add icon 🕂 in the **Font Name** field. A pop-up Font window will open.
- 2. Choose the **Font**, **Font Style** and **Size** that will be the new system default for all narrative, summary and interview text. Note that Arial, Tahoma and Times New Roman are the recommended fonts for optimal visualization.
- 3. Click **OK** to close the pop-up window and apply your selection to the **Font Preview** window.

#### Set to Display Organization Privacy Statement or Legal Notice After Logon

- To automatically display your organization's privacy statement after user logon, check the Display Privacy Statement on logon box. This will prompt users to read the privacy statement and click OK before Perspective loads.
- To automatically display your organization's legal notice after user logon, check the Display Legal Notice on logon box. This will prompt users to read the legal notice and click OK before Perspective loads.

#### Hide the All Records View Option on Data Forms and Pick Lists

To hide the All Records View option on data forms and pick lists, check the **Hide All Records View** box. Only the Quick View and Saved View options will now be available for all data forms in the Navigation pane, and only saved views will be available in pick lists.

#### Allow Users to Send Formatted Email Messages

To allow users to send formatted email messages, check the **Allow Format Email** box. Users will now have the option of sending email messages in plain text or in a formatted HTML table.

Click **Save** after each editing action.

General Settings	🔆 General -> General	
Account Policies Currencies	General Account Policies Currencies	
	🚽 Save	
Configuration Form Labels Administration Workgroups	Identifier Formats Incident Identifier Format Incident Prefix INC CCYY-########	
System Privileges Roles Users	Case Identifier Format Case Prefix CASE CCYY-########  Activity Identifier Format	
- Lookups - Flags - Officers - SOPs	Activity Prefix ACT CCYY-MM-######	
Visual Alerts	Default Measurement System	
Auditing	Metric	
	Standard	
	Organization	
	Font Name	
	Arial	
	Font Preview	
	Font Style	
	Display privacy statement on logon.	
	Display legal notice on logon.	
	☑ Hide All Records View	
	☑ Allow Format Email	

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## **Define User Password and Logon Parameters**

- 1. Open the **Account Policies** tab.
- 2. Under **Password Length**, set the minimum length for user passwords (6 to 35 characters).
- Under Password Uniqueness, specify whether or not Perspective should keep a history of user passwords. If yes, indicate the number of passwords to be kept in the password history from one to 10. For example, choosing 3 would require a user to go through three passwords before Perspective would allow him or her to re-use a former password.
- 4. Under **Maximum Password Age**, indicate whether or not passwords should expire after a certain number of days (1 to 180 days). Once a user password has expired, Perspective will prompt the user to select a new password.
- 5. Under **Password Format**, specify if passwords must contain special characters, both letters and numbers, or both uppercase and lowercase text. You can choose all, none or a combination of these options.
- 6. Under **Account Lockout**, enable or disable the option to lock out users after a specified number of unsuccessful logon attempts (1 to 9 attempts).
- 7. In the grid below **Account Lockout**, you can view a list of any users who are currently locked out of Perspective for exceeding the permitted number of unsuccessful logon attempts.
  - To view how long the account has been locked, hover your cursor over the entry in the **Locked Date Time** column.
  - To reset a locked account and allow the user to log in immediately, click the user account to select it, then click **Reset User Account**.
  - To reset all locked user accounts, click Reset All Users.
  - Click **Refresh** to refresh the grid.
- 8. Under **Miscellaneous**, choose to enable or disable users to log on to Perspective from more than one machine at the same time. Also, indicate whether passwords must be different from user IDs. It is recommended that concurrent logons should not be permitted and that passwords should be distinct from user IDs.
- 9. To reset the settings modified back to the old values, click **Reset**. In the confirmation window that pops up, click Yes. To save the reset, click **Save**.



General Account Policies Currencies					
🛃 Save					^
Password Length Minimum Password Length 6  Character(s) Password Uniqueness	Note: An affected	unt after ccessful logon attempts account will be locked ou			
Do not keep password history.	User Name	Domain Name	Database	Locked Date Time	
Remember     2     password(s)					
Maximum Password Age					
Password does not expire.					
O Expires in 90 😓 day(s)					
Miscellaneous					
Permit concurrent logon from same account.					
Password must be different from logon ID.					
Password Format					
Require alphanumeric.					
Require at least one special character.					
Require uppercase and lowercase combination.					
Reset To Defaults	Refresh	Res	et User Account	Reset All Users	<b>v</b>

# Select Default Currency, Add New Currencies, and Update Exchange Rates

- 1. Open the **Currencies** tab.
- 2. To add a new currency to the list, click Add.
- 3. Enter the currency's **Full Name**, **Code** (abbreviated name), **Symbol** and **Exchange Rate** in the popup window.
- 4. Check the Base Currency box to identify the new currency as the default currency of your Perspective database. Note that it is not recommended that you change your Base Currency once it has been initially set. Doing so creates inconsistency in your data.
- 5. Click **OK** in the pop-up window, and then click **Save**.



×
000
K Cancel

- To update the exchange rates of other currencies in relation to the base currency (the base currency is automatically given an exchange rate of 1.0000), select the currency, click Edit, modify the Exchange Rate in the pop-up window, and click OK.
- 7. To change the default currency listed under Base Currency, select the currency you wish to set as the new default and click **Edit**. Check the **Base Currency** checkbox in the pop-up window. In the confirmation window that pops up, click **Yes**. If you click No, the old Base Currency will be preserved. Click **OK**.

Note: The Base Currency cannot be deleted. If you wish to delete the current Base Currency, nominate a new Base Currency first, and then delete the unwanted currency entry.

General	🔆 General -> Currer	icles				
Account Policies	General Account Policies	Currencies				
- Currencies nguage	🖶 Add 📝 Edit 🗙 Delete					
Configuration Form Labels	Base Currency					
ninistration	Name	US Dollar (USD)				
Workgroups System Privileges	Symbol	s				
Roles	Exchange Rate	1.0000				
Users okups gs	Available Currencies					
icers	Long Name		Code	Symbol	Exchange Rate	Base Currency
Ps	Singapore Dollar		SGD	\$	0.2500	
ual Alerts	US Dollar		USD	S	1.0000	V
liting	Japanese Yen		JPY	¥	76.1052	Π
nung			CDN	S	0.3343	Г

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# Workgroups

## Add a New Workgroup

- 1. Open Administration, Workgroups in the Navigation pane, then click Add.
- 2. Enter the Workgroup Name and a Workgroup Description.
- 3. From the **Organization** pick list, select the organization that applies to the workgroup. If an applicable Organization record does not exist, use the Quick Add function at the bottom of the entity list to create one, ensuring that you add the logo and address of the organization to the new record. The logo and address (specifically the primary address) are recorded in the selected Organization record will appear on the workgroup's report cover pages.

Note: If no organization is selected for the workgroup, the organization specified in the **General Settings** form under the **General** tab will be used by default. Organizations can also be assigned at the individual User level, overriding any selections made in General Settings and/or Workgroups.

- 4. Optional: If you would like incidents associated with this workgroup to be identified with a unique Incident Number, Case Number or Activity Number prefix (that differs from the default prefix assigned under General Settings), enter this in the relevant **Prefix** field.
- 5. If you would like to allow the workgroup to import reports into the Gateway, check the Enable Imports to this Workgroup box. The Gateway tab will open by default. See Specify Gateway file import options and/or e-Reporting access options for a workgroup in the "Gateway Administration" section of this guide for further information. Note that checking this box does not give the workgroup access to the Gateway; it only gives them rights to submit reports to the Gateway. Only designated Gateway Administrators and Gateway Approvers are permitted to access the Gateway.

Note: Incident, Item, Person, Organization and Vehicle reports can be imported through the Import Manager.

6. Click Save.

# System Privileges

## **Assign System-Level Visibility and Access Rights**

- 1. Expand the four root nodes of the tree in the left part of the Visualization pane and select a system component, data form or other entity that you wish to work with.
- 2. Click the checkboxes and radio buttons on the right to define what users can see and how users can manipulate the selected entity:
  - Visible: Allows users to see the entity and its related buttons, icons and records, when they
    access Perspective.
  - Allow Override: Allows system-level entity rights to be overridden at a lower level (i.e., Role or User).
  - Full Control: Authorizes users to read, create, edit and delete entity records.
  - Read Only: Switches entity records to the read-only mode, so that they could not be edited or deleted by users.
  - Custom: Grants users the ability to create new entity records (Allow Add), read and edit existing entity records (Allow Edit) and/or delete entity records (Allow Delete).
  - It is highly recommended that users not be allowed to delete any records. A record deletion could compromise the integrity of your system and should be avoided in all but extraordinary circumstances.

General Settings General Account Policies	Administration -> System Privileges
Currencies	Workgroups System Privileges Roles Users
Configuration     Form Labels     Administration     Workgroups     System Privileges     Roles     Users     Lookups     Flags     Officers     SOPs     Visual Alerts     License Management     Auditing	Administration     Analyze and Report     Analyze and Report     Orats     Outsom Reports     Dashboard     Outsom     Allow Execute     Outsom     Allow Manage     Of Gateway     Allow Share

- Expand the remaining child nodes to display complete list of fields that constitute all the entities.
   Select a field name in the list.
- 4. Use the checkboxes on the right to customize users' access rights for the selected field:
  - **Required**: Designates the field as a required field that must be completed by users.
  - Hidden: Removes the field from the interface (hidden from users).
  - Hidden On New (active when the Hidden box is checked): Unchecking this box allows users to see the field in the records that are newly created. Checking both Hidden and Hidden On New options hides the field from both new and existing records.
  - Locked: Makes the field visible to the user, but not accessible for data entry or editing. In this
    case, the field appears greyed out and is locked from use.
  - Locked On New (active when the Locked box is checked): Unchecking this box allows users to
    access the field in the records that are newly created. Checking both Locked and Locked on
    New options locks the field from use in both new and existing records.
  - Allow Override: Allows system-level field rights to be overridden at a lower level (i.e., Role or User).
  - Allow Execute: If a user can share a query or custom report, that user can automatically execute them. The Allow Execute checkbox is for visual purposes only.
  - Allow Manage: Allows users to add, edit, delete, and clone queries or custom reports. If a user does not have Manage rights, he/she will not be able to add, edit, delete, or clone any queries or custom reports.
  - Allow Share: Allows users to share a query or custom report to other users. When a query or custom report owner shares a query, if the shared query or custom report is edited, the owner's copy of that query or custom report will be changed.

Note: Some system entities and fields are required by Perspective, and cannot be Overridden, Hidden or Locked. Whenever you encounter these entities, they will be marked with yellow explanatory Notes, while the unauthorized functions will be greyed out.

Administration -> System Privileges						
Workgroups	System Privileges	Roles	Users			
	s			Required Hidden Locked	Allow Ovenide Hidden On New Locked On New	Note: This field cannot be Hidden or Locked on New records as it is required by Perspective.

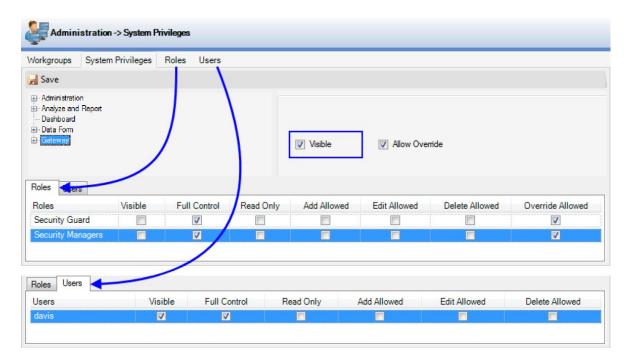
- 5. Expand the child nodes contained within the field nodes to continue to assign system-level visibility and access rights for as many entities and fields as you wish.
- 6. Click Save.

## View Discrepancies Between System-Level Rights and Role or User Rights

- 1. Expand the nodes to see available entities and fields, and make a selection.
- By default, the Roles tab at the bottom of the screen will open. If any discrepancies exist between the system-level rights for the selected entity or field and a role's rights for the same entity or field, the role and its access rights will be displayed at the bottom.
- 3. To view discrepancies between the role-level rights for the selected entity or field and a particular user's rights to the same entity or field, click the Users tab at the bottom of the screen. If any discrepancies exist, the user's ID and their access rights will be displayed below.

In the illustration below, davis is a user whose role is Security Managers. On the system level, reports are generally visible for new roles. However, the reports' visibility is disabled for all the users whose role is set to Security Managers, except for the user davis. The bottom Roles and Users tabs are cross-populated from the grids stored under **Privileges** of the corresponding roles (i.e., under

Privileges tab of the Security Managers role) and users (i.e., under Privileges tab of the user davis) that are accessible from the top Roles and Users tabs in Administration.

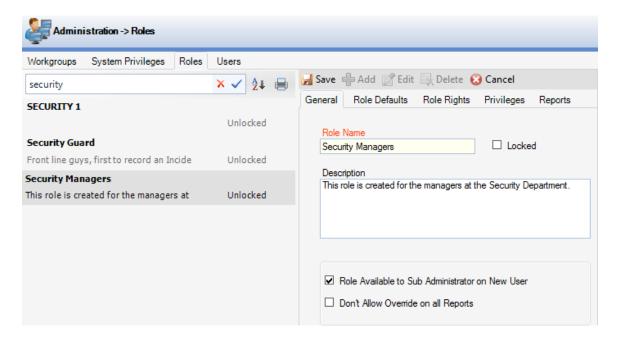


# Roles

All Role settings are located under the **Roles** tab of the **Administration** section in the Administration component.

## Add a New Role

- 1. Click Add.
- 2. Enter the Role Name and add a Description.
- 3. Check **Locked** to lock users belonging to the role out of Perspective (e.g., employees on leave, seasonal workers, etc.).
- 4. Check the **Role Available to Sub-Administrator on New User** box to allow Sub-Administrators to assign this particular role, and its associated rights and privileges, to new user accounts.
- 5. Check **Don't Allow Override on all Reports** to prevent any of the role's visibility rights for reports from being altered at the User level. This checkbox is only activated once Save is clicked.
- 6. Click Save.





## Establish Default Security Controls, Language, and Currency for a Role

- 1. Open the **Role Defaults** tab.
- 2. Select the workgroups you would like the role to have access to from the **Default Workgroups** list.
- From the Default Workgroup lookup list, select the workgroup the role's users will be working in most often. When a user belonging to this role creates a new record, it will be stored in the role's designated Default Workgroup.
- 4. Assign a **Default Language** to the role. This determines the field labels that will appear on forms when the role's users are logged on.
- 5. Assign an organizational rollup to the role in the **Default Org Rollups** section. Organizational rollups are hierarchical, so the option you select in the Org Level 1 field will determine what options are available in the Org Level 2 field and so on. As you move down the hierarchy, organizational rollups become more specific, naming groups within your organization that are increasingly specialized by company division or region. The role will only have access to records with organizational rollups that correspond to, or are lower than, the organizational rollup you select for the role. For example, if a record's organizational rollup is North America/Canada/Alberta and the role's organizational rollup is North America/Canada, the role will have access to the record.
- 6. Assign a **Default Access Level** to the role. The role will only be permitted to view data with the same or lower access level as its own.
- 7. Set the **Default Currency** for the role. All currency values entered in Perspective will now appear for the role in this currency.
- 8. To allow any of the Role Defaults to be overridden at the User level, check the **Allow Override** box directly beneath the relevant default setting, or uncheck the Allow Override box to prevent the setting from being overridden. By default, Allow Override boxes are checked.

	Privileges Reports	
Default Workgroups	Default Org Rollups	
45WG	Org Level 1	
Administrator - PPM2000 Work	North America	-
Advanced Users	Org Level 2	
	Canada	-
	Org Level 3	
	British Columbia	-
	Org Level 4	
-	Vancouver	-
Allow Override	Allow Override	
Default Workgroup	Default Access Level	
Advanced Users 👻	Level 3	•
	Allow Override	
Default Language	Default Currency	

## Select General Role Rights

 Select the Role Rights tab. The screen will contain a list of general rights with two columns of Enable and Allow Override checkboxes. By default, all Allow Override boxes will be checked allowing the corresponding role right or set of rights to be overridden at the User level.

🚽 Save	🖶 Add	🚀 Edit 💙	K Delete 📀	Cancel		
General	Role D	efaults F	Role Rights	Privileges	Reports	
	E. H.	All				
	Enable	Allow O				
			Administra			
		$\checkmark$	Sub-Admir			
		$\checkmark$	Superviso			
		$\checkmark$	Investigat	or		
		$\checkmark$	Full Histor	ry Access		
		$\checkmark$	View Audi	t History		
	Enable	Allow O	veride			
				- Chu Faib		
				p City Edit		
		$\checkmark$	Metric Me	asurement U	nit	
		$\checkmark$	Gateway /	Administrator		
		$\checkmark$	Gateway /	Approver		
		$\checkmark$	Edit Excha	ange Rates		
		$\checkmark$	Editing All	Narratives/S	ummaries	
		$\checkmark$	Locking R	ecords		
		$\checkmark$	Unlocking	Records		
		$\checkmark$	Sealing			
		$\checkmark$	Visual Ana	alysis Access	•	
		$\checkmark$	Quick Fin	d Access		
		$\checkmark$	Quick Fin	d Preview		
		$\checkmark$	Focal Poir	nt Access		
		<b>V</b>	Allow Mer	ge Entities		
		$\checkmark$	Allow Disp	batchlog Acce	ISS	
		<b>V</b>	DispatchL	og Read Only	/	



 Check Enable to apply the corresponding right or set of rights to the role's users, and uncheck the Allow Override box to prevent the corresponding right or set of rights from being overridden at the User level.

Administrator	Grants the user administrative privileges. Note: There are differences between the default Admin Master account and a Perspective User with Administrator rights. See the section Default Admin Master vs. Users with Administrator Rights for more information.
Sub-administrator	Allows the role's users to create user accounts and modify User Details and User Defaults, but only for users who are within their default workgroup and who have the same (or lower) access level and organizational rollup as their own.
Supervisor	Identifies the role's users as Supervisors within the system, giving them access to the Controls tab on all records. Among other things, this allows the role's users to change workgroups, organizational rollups and access levels of records.
Investigator	Identifies the role's users as Investigators within the system, giving them access to Investigation forms, tabs and functions.
Full History Access	Allows the role's users to view all incident involvements under the History tabs of Item, Person, Organization and Vehicle records, regardless of the security controls assigned to the records. Note that checking this box will not allow the role's users access to the actual Incident records, only the knowledge that the person, organization, item or vehicle was involved.
View Audit History	Permits the role's users to view all record modifications (including the information as to when and where they were made and who made them) tracked under the Audit History tab of each record.

GeoRollup City Edit	This feature will become functional in a future Perspective release. Please disregard it for now.
Metric Measurement Unit	Allows the role's users to see all measurement data in metric values. Currently, only the Height and Weight fields contain measurement data in Perspective.
Gateway Administrator	Assigns the role's users associated Gateway Administrator access privileges. Note: For more information on these roles and what they entail, see the Perspective User's Guide or Perspective's User Help.
Gateway Approver	Assigns the role's users associated Gateway Approver access privileges. Note: For more information on these roles and what they entail, see the Perspective User's Guide or Perspective's User Help.
Edit Exchange Rates	Allows the role's users to update exchange rates under the Currencies tab of General Settings.
Editing All Narratives/Summaries	Allows the role's users to edit any unsealed narratives or summaries, even if they are not the original author.
Locking Records	Allows the role's users to lock records while barring all users from making any changes or additions to the selected records.
Unlocking Records	Allows the role's users to re-instate editing rights to previously locked records.
Sealing	Allows the role's users to seal narratives, summaries and interviews from future editing by any user.



Visual Analysis Access	If your system includes Perspective Visual Analysis, grants the role's users access to the application. Note: Visual Analysis is an optional module for Perspective. If you are not certain whether your Perspective system includes this module, please contact Customer Service for verification.
Quick Find Access	Grants users access to the Quick Find tool.
Quick Find Preview	Allows users to preview the search results from the Quick Find tool.
Focal Point Access	If your system includes Perspective Focal Point, <sup>†</sup> grants the role's users access to the application. Note: Focal Point is an optional module for Perspective. If you are not certain whether your Perspective system includes this module, please contact Customer Service for verification.
Custom Search Access	Allows the role's users access to the Custom Search feature. Note: This option will only be visible if the Custom Search feature has been configured in the Perspective Service Manager.
Allow Merge Entities	Allows the role's users to merge Item, Organization, Person and Vehicle records in the Data Forms component of Perspective.
Allow DispatchLog Access	Grants the role's users access to the Perspective DispatchLog module.
DispatchLog Read Only	Grants the role's users read only rights to view activity details and notes within DispatchLog. Users with these rights cannot add, edit, or delete information in DispatchLog.

Access Level	Allows the role's users to assign an access level to a new record that is higher or different from their own. For example, if the Enable box for the Allow elevate on new records for Access Level right is selected for a role with an Access Level of 3, the role's users will be able to assign Access Levels of 4 or 5 to new records. However, once one of the role's users has assigned an elevated access level to a new record, saved the change and exited the record, the role's users will no longer be permitted access to the record, as it falls beyond the scope of their role privileges.
Workgroup	Allows the role's users to assign a workgroup to a new record that is higher or different from their own.
Org Rollups	Allows the role's users to assign an organizational rollup to a new record that is higher or different from their own.

## Specify Visibility and Access Privileges for a Role

- 1. Open the **Privileges** tab.
- Expand the four root nodes and select a system component, data form or other entity from the list.
   The system rights set for the entity will be displayed on the right.
- 3. To override system rights for this particular role, use the checkboxes and the radio buttons on the right to define what the role's users can see and how users can manipulate the selected entity:
  - Visible: Allows users to see the entity and its related buttons, icons and records, when they
    access Perspective.
  - Full Control: Authorizes users to read, create, edit and delete entity records.
  - Read Only: Switches entity records to the read-only mode, so that they could not be edited or deleted by users.
  - Custom: Grants users the ability to create new entity records (Allow Add), read and edit existing entity records (Allow Edit) and/or delete entity records (Allow Delete).

Allow Override: Allows role-level entity rights to be overridden at a lower level (i.e., User). By default, Allow Override boxes are checked, unless the Don't Allow Override on all Forms/Fields box has been checked on the General tab of this form.

It is highly recommended that users not be allowed to delete any records. A record deletion could compromise the integrity of your system and should be avoided in all but extraordinary circumstances.

🚽 Save 🛑 Add 📝 Edit 🖳 Delete 😜 General Role Defaults Role Rights	Cancel Privileges Repo	orts	
Forms  Administration  Analyze and Report  Data Form  Activities  Cases  Incidents  Persons  Persons  Cateway  Gateway	Ô	Full Control Read Only Custom	Allow Ovenide Allow Add Allow Edit Allow Delete

- Expand the remaining child nodes to display a complete list of fields that constitute all the entities.
   Select a field name in the list. The field's system rights appear on the right.
- 5. To override system rights for this particular role, use the checkboxes to define the role's access rights for the selected field:
  - **Required**: Designates the field as a required field that must be completed by users.
  - Hidden: Removes the field from the interface (hidden from the user).
  - Hidden On New (active when the Hidden box is checked): Unchecking this box allows users to see the field in the records that are newly created. Checking both Hidden and Hidden On New options hides the field from both new and existing records.
  - Locked: Makes the field visible to the user, but not accessible for data entry or editing. In this
    case, the field appears greyed out and is locked from use.
  - Locked On New (active when the Locked box is checked): Unchecking this box allows users to
    access the field in the records that are newly created. Checking both Locked and Locked on
    New options locks the field from use in both new and existing records.

 Allow Override: Allows role-level field rights to be overridden at a lower level (i.e., User). By default, Allow Override boxes are checked, unless the Don't Allow Override on all Forms/Fields box has been checked on the General tab of this form.

Note: Some system entities and fields are required by Perspective, and cannot be Overridden, Hidden or Locked. Whenever you encounter these entities, they will be marked with yellow explanatory Notes, while unauthorized functions will be greyed out.

Save 🖶 Add 📝 Edit 🖳 Delete 🛛	😮 Cancel			
eneral Role Defaults Role Rights	Privileg	es Reports		
Forms				
. Cases		Required	Allow Override	Note:
- Incidents - File Number	=	Hidden	Hidden On New	This field cannot be Hidden or Locked on New records as it is required by
		Locked	Locked On New	Perspective.
-Occurred To Date/Time				
Record Owner Incident Duration				
Class Rollup				
Business Unit Rollup				
- Site Rollup - Summary				
- Reported to Police				
Police File Number	-			

- 6. Expand the child nodes contained within the field nodes to continue to specify visibility and access rights of the role for as many entities and fields as you wish.
- 7. Click Save.

# View Discrepancies Between Role Rights and User Rights

- 1. Open the **Privileges** tab.
- 2. Expand the nodes to see available entities and fields, and make a selection.
- If any discrepancies exist between the role-level rights for the selected entity or field and a user's rights for the same entity or field, the user and their access rights will be displayed at the bottom of the screen.

In the illustration below, the role's report visibility is disabled for all the constituent users, except for the user davis.



aeneral Role Defaults Role Rights	Privileges	Reports				
Forms						
<ul> <li>Administration</li> <li>Analyze and Report</li> <li>Dashboard</li> <li>Data Form</li> <li>Gateway</li> </ul>	ſ	Visible	Allow Override			
· · ·	1					
Discrepancy Report	Visible	AllowFullControl	AllowReadOnly	AllowAdd	AllowEdit	AllowDelete
Discrepancy Report UserID	VISIDIE					

# Set Report Visibility for a Role

- 1. Open the **Reports** tab.
- 2. To allow a role's users to see reports listed under Report Title, check the **Visible** boxes beside the report names.
- 3. To allow any of these report visibility settings to be overridden at the User level, check the Allow Override box for the report, or uncheck the Allow Override box to prevent the role's report visibility from being overridden. By default, Allow Override boxes are checked, unless the Don't Allow Override on all Reports box has been checked on the General tab of this form.
- 4. Click Save.

# View Discrepancies Between Role and User Report Visibility

- 1. Open the **Reports** tab.
- 2. Select a report listed under Report Title.
- 3. If any discrepancies exist between the role's visibility for the selected report and a user's visibility for the same report, the user and their visibility setting will be displayed at the **Discrepancy Report** pane.



neral Role Defaults Role I	Rights	Privileges	Reports				
vailable Reports							
	Repo	rt Title			Visible	Allow Override	
RPT_Reports_CaseAssignme	entByPe	rsonReport			<b>V</b>		
RPT_Reports_CaseLossesRe	eport			_		<b>V</b>	
RPT_Reports_CaseReport					1		
RPT_Reports_CaseSummary	Report				<b>v</b>	<b>V</b>	
RPT_Reports_CaseTotalsRep	port					<b>V</b>	
RPT_Reports_ClassClassific	ationRe	port				<b>V</b>	
RPT_Reports_IncidentLosses	Report				<b>V</b>	<b>V</b>	
RPT Reports IncidentReport				<b>V</b>			
iscrepancy Report				_\			
IserID		Visible		-			
avis				7			



# Users

All Users settings are located under the **Users** tab of the **Administration** section in the Administration component.

# Add a New User

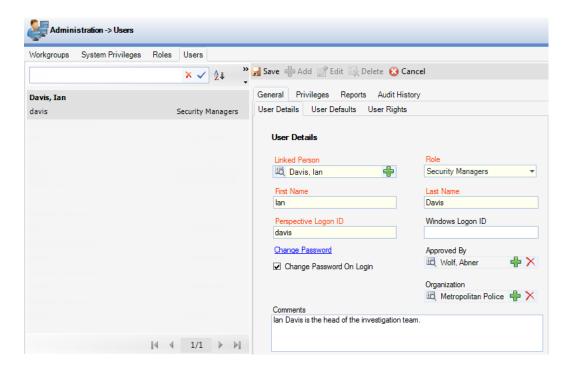
- 1. Click Add.
- Select the name of the user from the Linked Person pick list. If a Person record does not already
  exist for the user, use the Quick Add function to create one. The First Name and Last Name fields
  will now automatically populate with information drawn from the linked person's record.
- 3. Assign a **Role** to the user. All rights and privileges assigned to the role will automatically cascade down to the user.
- 4. Choose a **Perspective Logon ID** for the person.
- If your Perspective system uses single sign-on, enter the user's SSO username in the Corporate ID field.
- Click Set Password to assign a password to the user account. An Enter Password pop-up window will appear. Enter the password twice and click OK. (Note that once this record has been saved, the Set Password link will be labelled Change Password.)

Enter Password	×
Enter Password twice case-sensitive.	e to confirm. Note Password is
Enter New Password	•••••
Confirm Password	•••••
	OK Cancel

7. Check the **Change Password On Logon** checkbox to force the user to choose a new password the next time they logon to the system. Note: Only users logging in with a Perspective logon ID will be required to change their password.



- Select the name of the person who approved the creation of this user account from the Approved By pick list. If a Person record does not already exist for the user, use the Quick Add function to create one.
- 9. Select the organization that the user belongs to from the Organization pick list. If an applicable Organization record does not already exist, use the Quick Add function to create one, ensuring that you add the organization's logo and address to the new record. The logo and address appearing in the selected Organization record will now appear on the user's report cover pages. If no organization is selected for the user, the organization specified for the user's workgroup will be used. If none is specified for the user's workgroup, then the organization selected under the General tab of the General Settings form will be used by default.
- Enter any other notes in the Comments box. You have now completed the User Details form.
   Before saving a user's record, you must enter required default settings for the user account under the User Defaults sub-tab.



# Establish Default Security Controls, Language, and Currency for a User

Note: Any default settings specified for the user's role will automatically be assigned to the user. Verify that these settings are appropriate for the user and, if necessary, complete the following steps to modify them.

- 1. Open the **General** tab, the **User Defaults** sub-tab.
- 2. Select the workgroups you would like the user to have access to from the Workgroups list.
- From the Default Workgroup lookup list, select the workgroup the user will be working in most often. When the user creates a new record, it will be stored in the user's designated Default Workgroup, unless they assign it to one of their other workgroups.
- 4. Assign an organizational rollup to the user in the Org Rollups section. Organizational rollups are hierarchical, so the option you select in the Org Level 1 field will determine what options are available in the Org Level 2 field and so on. As you move down the hierarchy, organizational rollups become more specific, naming groups within your organization that are increasingly specialized by company division or region. The user will only have access to records with organizational rollups that correspond to, or are lower than, the organizational rollup you select for the user. For example, if a record's organizational rollup is North America/Canada/Alberta and the user's organizational rollup is North America/Canada, the user will have access to the record.
- 5. Assign an **Access Level** to the user. The user will only be permitted to view data with the same or lower access level as their own.
- 6. Assign a **Default Language** to the user. This determines the field labels that will appear on forms when the user is logged on.
- 7. Set the **Default Currency** for the user. All currency values entered in Perspective will now appear for the user in this currency.
- 8. Check the Metric measurement unit box to allow the user to see measurements in metric.
- 9. To allow the user to assign an access level, organizational rollup and/or workgroup to a new record that is higher or different from their own, check the Allow elevate on new records for **Access Level**,

**Org Rollups** and/or **Workgroup** checkboxes. For example, if the Allow elevate on new records for Access Level checkbox is selected for a user with an Access Level of 3, the user will be able to assign Access Levels of 4 or 5 to new records. However, once the user has assigned an elevated access level to a new record, saved the change and exited the record, they will no longer be permitted access to the record, as it falls beyond the scope of their user privileges.

#### 10. Click Save.

ave 🖶 Add 📝 Edit 🖳 Delete 😢 🤇		
er Details User Defaults User Right	•	
Default Settings		
Workgroups	Org Rollups	
15WG	Org Level 1	
Administrator - PPM2000 Work	North America	-
Advanced Users		•
	Org Level 2	
	Canada	<b>•</b>
	Org Level 3	
	British Columbia	•
	Org Level 4	
	Vancouver	<b>•</b>
Default Workgroup	Access Level	
Advanced Users 👻	Level 5 (Highest)	-
Allow elevate on new records for:	Default Language	
New clevale of new records for.	System English	<b>*</b>
Access Level	System English	
	Default Currency	
Org Rollups	Canadian Dollar (CDN)	<b>•</b>
✓ Workgroup		
	Metric measurement unit	

# Set General User Rights

 Open the General tab, the User Rights sub-tab. The screen will contain groups of general rights with checkboxes. The rights that are disabled for the user on their role level will appear greyed out.



Jser Deta		story s	
Use	r Rights		
<b>v</b>	Administrator		Sub-Administrator
✓	Investigator	✓	Supervisor
~	Visual Analysis Access	•	Full History Access
<b>v</b> (	Quick Find Access	✓	View Audit History
<b>v</b> (	Quick Find Preview	✓	Locking Records
<b>v</b>	Allow Dispatchlog Access	✓	Unlocking Records
	DispatchLog Read Only	✓	Sealing
<b>v</b> (	Gateway Administrator	✓	Editing All Narratives/Summaries
<b>v</b> (	Gateway Approver	✓	Allow Merge Entities
✓	Focal Point Access		

2. Check the rights that you would like to apply to the user.

Administrator	Grants the user administrative privileges. Note: There are differences between the default Admin Master account and a Perspective User with Administrator rights. See the section Default Admin Master vs. Users with Administrator Rights for more information.
Sub-administrator	Allows the user to create user accounts and modify User Details and User Defaults, but only for users who are within their default workgroup and who have the same (or lower) access level and organizational rollup as their own.
Investigator	Identifies the user as an Investigator within the system, giving them access to Investigation forms, tabs and functions.
Supervisor	Identifies the users as Supervisors within the system, giving them access to the Controls tab on all records. Among other things, this

	allows the user to change workgroups, organizational rollups and access levels of records.
Visual Analysis Access	If your system includes Perspective Visual Analysis, grants the user access to the application.
Quick Find Access	Grants the user access to the Quick Find tool.
Quick Find Preview	Allows the user to see a preview of the Quick Find tool search results.
Allow DispatchLog Access	Grants the user access to the Perspective DispatchLog module.
DispatchLog Read Only	Grants the user read only rights to view activity details and notes within DispatchLog. Users with these rights cannot add, edit, or delete information in DispatchLog.
Gateway Administrator	Assigns user associated Gateway Administrator access privileges. Note: For more information on these roles and what they entail, see the Perspective User's Guide or Perspective's User Help.
Gateway Approver	Assigns user associated Gateway Approver access privileges. Note: For more information on these roles and what they entail, see the Perspective User's Guide or Perspective's User Help.
Focal Point Access	If your system includes Perspective Focal Point, grants the user access to the application. Note: Focal Point is an optional module for Perspective. If you are not certain whether your Perspective system includes this module, please contact Customer Service for verification.
Full History Access	Allows the user to view all incident involvements under the History tabs of Item, Person, Organization and Vehicle records, regardless of the security controls assigned to the records. Checking this box will not allow the user access to the actual Incident records, only the

Users

	knowledge that the person, organization, item or vehicle was involved.	
View Audit History	Permits the user to view all record modifications (including when and where they were made and who made them) tracked under the Audit History tab.	
Locking Records	Allows the user to lock records while barring all other users from making any changes or additions to the selected records.	
Unlocking Records	Allows the user to re-instate editing rights to previously locked records.	
Sealing	Allows the user to seal narratives, summaries and interviews from future editing by any user.	
Editing All Narratives/Summaries	Allows the user to edit any unsealed narratives or summaries, even if they are not the original author.	
Allow Merge Entities	Allows the role's users to merge Item, Organization, Person and Vehicle records in the Data Forms component of Perspective.	
Allow Custom Search Access	Allows the role's users access to the Custom Search feature. Note: This option will only be visible if the Custom Search feature has been configured in the Perspective Service Manager.	
User Locked	Locks the user out of the system (e.g., employees who have been terminated, employees on leave, seasonal employees, etc.).	
Service Account (Password Never Expires)	Creates a service account for users who will be accessing the Perspective API through Integration Services. Because service account users can only access Perspective through its back end and cannot log into Perspective, Dispatch, Dashboard, or Web Portal, when this checkbox is selected, you do not need to enable or disable any other rights in the User Rights tab.	

# Specify Visibility and Access Privileges for a User

- 1. Open the **Privileges** tab.
- Expand the four root nodes and select a system component, data form or other entity from the list. The system and/or role rights set for the entity will be displayed below.
- 3. To override system and/or role rights for this particular user, use the checkboxes and radio buttons to define what the user can see and how the user can manipulate the selected entity:
  - Visible: Allows the user to see the entity and its related buttons, icons and records, when they
    access Perspective.
  - **Full Control**: Authorizes the user to read, create, edit and delete entity records.
  - Read Only: Switches entity records to the read-only mode, so that they could not be edited or deleted by the user.
  - **Custom**: Grants the user the ability to create new entity records (Allow Add), read and edit existing entity records (Allow Edit) and/or delete entity records (Allow Delete).
  - It is highly recommended that users not be allowed to delete any records. A record deletion could compromise the integrity of your system and should be avoided in all but extraordinary circumstances.



🚽 Save 帅 Add 📝 Edit 🗙 D	elete 🔞 Cancel		
General Privileges Reports	Audit History		
Entities Fields  Administration Administration Flags General Settings Ceneral Settings Ceneral Settings Ceneral Settings Ceneral Settings Consumption Consumption Consumption Consumption Consumption Consumption Ceneral Cene			
<ul> <li>☑ Vsible</li> <li>④ Full Control</li> <li>○ Read Only</li> <li>○ Custom</li> </ul>	Allow Add	Allow Edit	Allow Delete

- 4. Expand the remaining child nodes to display a complete list of fields that constitute all the entities. Select a field name. The system and/or role rights set for the field will be displayed below.
- 5. To override system and/or role rights for this particular user, use the checkboxes to define the user's access rights to the selected field:
  - **Required**: Designates the field as a required field that must be completed by users.
  - Hidden: Removes the field from the interface (hidden from the user).
  - Hidden On New (active when the Hidden box is checked): Unchecking this box allows users to see the field in the records that are newly created. Checking both Hidden and Hidden On New options hides the field from both new and existing records.
  - Locked: Makes the field visible to the user, but not accessible for data entry or editing. In this
    case, the field appears greyed out and is locked from use.
  - Locked On New (active when the Locked box is checked): Unchecking this box allows users to
    access the field in the records that are newly created. Checking both Locked and Locked on
    New options locks the field from use in both new and existing records.



Note: Some system entities and fields are required by Perspective, and cannot be Hidden or Locked. Whenever you encounter these entities, they will be marked with yellow explanatory Notes, while the unauthorized functions will be greyed out.

General Privileges Reports	Audit History
Ertities Fields	
_	This field cannot be Hidden or Locked on New.
<ul> <li>Required</li> <li>Hidden</li> </ul>	Hidden On New

- 6. Expand the child nodes contained within the field nodes to continue to specify visibility and access rights for the user for as many entities and fields as you wish.
- 7. Click Save.

# Set Report Visibility for a User

- 1. Open the **Reports** tab.
- 2. To allow a user to see reports listed under Report Title, check the **Visible** boxes beside the report names.
- 3. Click Save.



Save 🖶 Add 📝 Edit 🖳 Delete 😢 Cancel		
General Privileges Reports Audit History Available Reports		
Available Reports Report Title	Visible	
RPT_ActivityLandscape_ReportTitle		
RPT ActivityPortrait ReportTitle		
RPT_FrequencyDistribution_Report		
RPT_Reports_BussinessUnitHierarchyReport		
RPT_Reports_CaseLossesReport		
RPT_Reports_CaseSummaryReport		
RPT_Reports_CaseTotalsReport		
RPT_Reports_ClassClassificationReport		
RPT_Reports_ClassHierarchyReport		
RPT_Reports_IncidentAssignmentByPersonReport		
RPT_Reports_OrganizationReport		

# Track All Changes Made to a User Account

- 1. Open the **Audit History** tab.
- 2. Click the Get Audit History button to view all modifications made to the user account since its creation. The pane on the left contains entries for each change made to the record. DateTime indicates when the change was made; UserID reveals who made the change; Record Action describes what type of change was made; and Machine Info specifies which computer was used to make the change.
- 3. Select an entry to view further details of the change made in the pane on the right. Expand the nodes to see exactly what the data value was **Before** and **After** the change was made.

Save 🖶 Add 🗭 Edit General Privileges R Get Audit History Drag a column header h	eports Audit Histo	Ŋ		After: True
DateTime (GMT)	UserID	Record Action	Machine Info	··· Before: (NULL)
2011/07/20 09:21:01	remnyakova	Updated	192.168.1.94	After: True
2011/07/20 09:20:41	remnyakova	Updated	192.168.1.94	Before: (NULL)
2011/07/20 09:19:55	remnyakova	New	192.168.1.94	
				Summary - yotk
				Record Count: 3 User: remnyakova Record Action: New Date/Time Yours: 20/07/2011 3:19:55 PM Users: 20/07/2011 3:19:55 PM GMT: 20/07/2011 9:19:55 PM



# **Officers (DispatchLog Only)**

# Add a New Officer for Perspective Dispatching

Note: This section refers to **DispatchLog** settings. For more information on the settings for **Dispatch**, refer to the **Dispatch Administrator's Guide**.

- 1. In the Navigation pane, select **Officers**.
- 2. Click Add.
- 3. Select the name of the officer from the **Involved Person** pick list. If a Person record does not already exist for the user, use the Quick Add function to create one.
- 4. From the **Default Workgroup** lookup list, select the workgroup to which the officer will normally be administered.
- 5. Place the officer into a **Team** selecting it from the lookup.
- 6. In the **Default Call Sign** lookup, select a call sign that will be attributed to the officer once they are brought on duty in Perspective DispatchLog.
- 7. Under the **Default Location** lookups, select the initial location specifications that will be attached to the officer once they are brought on duty in Perspective DispatchLog.
- 8. Check the **Officer Locked** box to hide the officer in Perspective DispatchLog.
- 9. Click Save.

General Settings     General     General     Account Policies     Currencies     Configuration     Form Labels     Administration     Workgroups     System Privileges     Roles     Users     Lookups     Flags     Officers     SOPs     Visual Alerts     Auditing	Enter filter text.	× ✓ Å	officers		
	Binkley, Velma Central	Team 1	Save 🖶 Add 📝 Edit 🗙 Delete 🛞	Cancel	
	Blake, Daphne Central Team 1		Officer Details		
	Bruce, Tom Central	Team 1	Involved Person	Site	
	Camillo, Tony Central	Team 2	Lick, Daphne Default Workgroup Central	Building	
	Cassidy, Natasha Central	Team 2	Team 1	Location	
	Chan, Peter Central	Team 2	Default Call Sign	Section	
	Clancy, Kevin Doons	Team 3	Officer Locked		
	Clemments, Dana Doons	Team 3			

# **License Management**

Depending on your licensing, use the License Management tool to access concurrent licenses, or named licenses.

#### **Concurrent Licenses**

If you have concurrent licenses, the License Management tool displays a list of all users currently logged in to Perspective, and the maximum number of concurrent logins available to you. You have the ability to end these sessions. The Active Services grid displays a list of any service running on a service account; this takes up a license, and these sessions cannot be ended.

To end a user's session, do the following steps:

- 1. In the Navigation pane, select License Management.
- 2. Select a user from the User Name list.
- 3. Click **End Session**.
- 4. Click Yes.



e 🥔 Refresh 01:50					
ive Sessions		Maxim	um 25 Of Concurent Logins		
User Name	Domain Name	Database	Last Action (GMT)		Арр
lee		default	08/08/2013 04:23 PM		Desktop
gk		default	08/08/2013 05:28 PM		Desktop
hradmin		default	08/08/2013 08:58 PM		Desktop
gk		default	08/08/2013 09:56 PM		Desktop
bb		default	08/08/2013 09:05 PM		Desktop
JL		default	08/08/2013 09:54 PM		Desktop
RT		default	08/08/2013 09:34 PM		Desktop
tive Services					End Sessi
tive Services	Last Action (GMT)	Datal	75e	Ann	End Sessi
tive Services User Name bb	Last Action (GMT) 08/08/2013 6:12 AM	Datat defa		App Mobile	End Sessi

#### **Named Licenses**

If you have named licenses, the License Management tool allows you to assign user licenses, or use the Auto Assign option.

To access your licensed Perspective users, select License Management.

The left grid displays a list of all active sessions. The right grid displays a list of all licensed users (the number of licensed users is above this grid, as well as the number of licenses available, and the number of pending releases). The bottom grid displays a list of all active services.

#### Assign a User

To assign users individually, do the following steps:

- 1. Click the **Assign** button on the bottom of the screen.
- 2. Find the user from the entity list that you want to assign a license to.

3. Click **Select**.

#### Remove a User

You may want to remove a user to free up a license:

- 1. Click the name (or corresponding row) of the license you want to remove from either the active session list, or the licensed user's list.
- 2. Click the **Remove** button on the bottom of the screen. A pop-up window will appear.
- 3. Click Yes if you want to remove the license. Click No if you do not want to remove the license.
  - It will take 24 hours for the license to become available again.

#### Auto Assign Users

If you have a large number of users and want to automatically assign each of them a license, do the following steps:

- 1. Check the Auto Assign box.
  - All users will be assigned licenses.

Note: More than one of the same User Account cannot be used on the same application at the same time. For example, a user cannot be logged into Perspective Desktop Client more than once at the same time, but the same user can be logged into Perspective Desktop Client and Mobile at the same time.

			Licensed Users : 12	Licenses Available : 13	Pending Release : 0
Database	Last Action (GMT)	Арр	User Name	Domain Name Database	License Da
default	08/12/2013 05:38 PM	Desktop	ms1	default	08/12/2013
default	08/12/2013 05:57 PM	Desktop	ASAdmin	default	08/07/2013
default	08/12/2013 05:28 PM	Desktop	bb	Perspective_40	08/12/2013
default	08/12/2013 03:50 PM	Desktop	gk	default	08/07/2013
default	08/12/2013 05:41 PM	Desktop	rc	Perspective_40	08/12/2013
default	08/12/2013 05:48 PM	Desktop	RTAdmin	default	08/07/2013
			JL	Perspective_40	08/12/2013
			rc	default	08/07/2013
			JL	default	08/07/2013
			RT	default	08/12/2013
			RT	Perspective_40_	08/12/2013
			hradmin	Perspective_40	08/12/2013
Database	A	00	1		
default					
	default default default default default default Database	default         00122013 05:38 FM           default         00122013 05:57 FM           default         00122013 05:58 FM           default         00122013 05:58 FM           default         00122013 05:58 FM           default         00122013 05:41 FM           default         00122013 05:48 FM           default         00122013 05:48 FM           default         00122013 05:48 FM	default         00/12/2013 05:38 PM         Desktop           default         00/12/2013 05:57 PM         Desktop           default         00/12/2013 05:57 PM         Desktop           default         00/12/2013 05:58 PM         Desktop           default         00/12/2013 05:50 PM         Desktop           default         00/12/2013 05:41 PM         Desktop           default         08/12/2013 05:48 PM         Desktop           default         08/12/2013 05:48 PM         Desktop	Database         Last Action (GMT)         App         User Name           default         081202013 0538 PM         Desktop         Mail           default         081202013 0552 PM         Desktop         Bb           default         081202013 0552 PM         Desktop         gk           default         081202013 055 PM         Desktop         gk           default         081202013 054 PM         Desktop         gk           default         081202013 054 PM         Desktop         gk           default         081202013 0548 PM         Desktop         gL           default         081202013 0548 PM         Desktop         JL           rc         JL         RT         RT           Markin         Desktop         JL         RT           RT         Markin         Desktop         Standard	Database         Last Action (GMT)         App           default         081202013 0538 PM         Desktop           default         081202013 0552 PM         Desktop           default         081202013 054 PM         Desktop           default         081202013 054 PM         Desktop           default         081202013 054 PM         Desktop           default         081202013 0548 PM         Desktop           default         081202013 0548 PM         Desktop           JL         Perspective_40           RTAdmin         default           JL         default           JL         default           JL         default           RT         default           RT         Perspective_40           RT         Perspective_40           hradmin         Perspective_40

Assign Remove

📝 Auto Assign



# Auditing

# View When, Where, and Who Accessed or Modified a Record

- 1. Select **Auditing** in the Navigation pane.
- 2. From the **Module** lookup list, choose the system component for which you would like to view audit information:
  - Activities: Activity record creations, updates, deletions, and imports are audited.
  - Administration: Changes to general settings, system entity privileges, system field privileges, role privileges, workgroups, system languages, and form labels are audited.
  - Administration Sessions: Logon, logoff, ended, and expired sessions are audited.
  - Administration System: Not applicable.
  - Administration Users: User creations and updates are audited.
  - Cases: Case record creations and updates are audited.
  - elncidents: elncident record updates are audited.
  - Incidents: Incident record creations, updates, and deletions are audited.
  - **Items**: Item record creations and updates are audited.
  - **Organizations**: Organization record creations and updates are audited.
  - **Persons**: Person record creations and updates are audited.
  - Vehicles: Vehicle record creations and updates are audited.
- 3. If you would like to view record modifications made by a particular user, select the name of the user from the **User ID** pick list.
- 4. Specify a **Date Range** to narrow your search results temporally.

- 5. Click Search. Results will be displayed in the panes below. The pane on the left contains entries for each change made to the record. The details reflected in the list of entries (i.e., column headings) vary depending on the module selected. Generally, the entries indicate the date and time the change was made (Date/Time), who made the change (UserID), where the change was applied (Record Description), what type of change was made (Record Action), which computer was used to make the change (Machine Info), as well as other module-specific information.
- 6. Select an entry to view further details of the change made in the pane on the right. Expand the nodes to see what the data value was **Before** and **After** the change was made.

Note: Functions 7-11 are only available when logged in as the default Admin Master user.

- 7. To ensure the system continues to track the creation and modification of records in the selected module, leave the **Audit Enabled** box checked. Unchecking this box will disable audit functionality.
- To allow the system to track when records are accessed and read in the selected module, check the Audit Reads box. Perspective will only keep track of this information once this box is checked; the system cannot audit retroactively.
- To specify how long the system should store audit information for the selected module, click Keep data indefinitely or choose the number of days (1-180) in Retention Period.
- 10. Click **Purge all audit data** to clear the system of the module's stored audit information.
- Once you have altered the Retention Period of audit data, or clicked the Audit Reads or Audit Enabled box, click Save Changes.



	1	ncidents			•	
User ID Date Range From			Date Range To			
WT		🖶 🗙	2014-04-08		: 🔳 🗙	2014-06-25 : 🔤 🗙 Search
Date/Time	User ID	Record De /	Record	Co	Machine I	Date/Time:bb: 2014-05-30 10:15:12 AM WT: 2014-05-30 10:15:12 AM GMT: 2014-05-30 4:15:12 PM
2014-05-30	WT	ISMK-2014-0	New		10.50.0.62	
2014-06-02	WT	ISMK-2014-0	Updated		10.50.0.62	
2014-06-02	WT	ISMK-2014-0	New		10.50.0.62	workgroup D
2014-06-03	WT	ISMK-2014-0	New		10.50.0.62	After: fc2f412a-91d2-41f9-a4c5-34b09aeac589
2014-06-03	WT	ISMK-2014-0	New		10.50.0.62	⊖-Owner Before: (NULL)
2014-06-19	WT	QAINC00086	Updated		10.50.0.62	After: True
2014-06-19	WT	QAINC00086	Updated		10.50.0.62	-Read
						Audit Enabled     Retention Period     Audit Reads     Keep data indefinitely
						Expires in     Purge
						90 🌲 days

# Lookups

A "lookup" is a controlled part of Perspective's interface which is represented by a single-string field with an attached list of options to choose from (e.g., the Vehicle Color drop-down list or Site Rollup). There are two types of lookups in Perspective—single-tier lookups and multi-tier lookups.

A **single-tier lookup** is an independent lookup that does not imply any subordinate lookups. For example, the Vehicle Color drop-down list may provide a choice of such values as "Silver", "Black" or "Blue", which does not pre-define the choices that are available for lookups that describe other vehicle properties, like Vehicle Style or Vehicle Model.

In contrast, a **multi-tier lookup**—also known as "rollup"—is a complex architecture of hierarchically dependent lookups, where the value selected for the first lookup in the sequence pre-defines the values available for the following lookup. For example, the Vehicle Make Model Rollup consists of the embedded lookups Vehicle Make (e.g., Audi, BMW, etc.) and Vehicle Model (e.g., A3, Q7, etc. for Audi; 630csi, M6, etc. for BMW).

To edit the content of lookups that are available in Perspective, use the **Lookups** section in the Administration component.

# Modify a Single-Tier Lookup List

- Click once to select one of the lookup categories in the alphabetized list and display its content on the right. Double-click to select a category and see the associated forms at the bottom of the screen with the Language tab open by default.
- 2. Select the type of modification required and follow the procedures below:
- To add a new option to the selected lookup list, click the Add New button and type the option in the Custom English field. Although Custom English is the default language for all lookups, you can enter language-specific lookup options in the appropriate language/label set text fields. Custom English lookup options still appear for users assigned to other languages, if there are no alternative lookup options specified for their assigned language.
- To edit an option in the selected lookup list, click on the option to highlight it, and edit the text in the **Custom English** field.



- To delete an option from the selected lookup list, highlight the option in the list, and click the **Delete** button. Note that you will not be able to delete any lookup list options that have already been used in existing Perspective records. If this occurs, you can hide the value from visibility so users cannot choose the value from the lookup list when completing a record. See "Specify Workgroup Visibility for a Lookup List Value" on page 51 for further details.
- 3. Click Save.

Lookups	
Save Edit & Refresh Activities U Activities 4 Activities 4 Activities 4 Activity Statuses Apency Statuses Apency Status Assignment Types CallSgn CalSource CaseClatepoties CaseClatepoties CaseClatepoties CaseSure Severty	Inactive  Escalated to Investigations  Inactive  No Futher Action Taken  Pending Cout  Unsolved  Wating for Approval  Wating for Assignment
Cases utWatchList CaseStatuses CothingColors CothingColors CothingTypes DamagaSeventies Incident_Organization_utFindustryTypinoident_Organization_utFindustryTypinoidentRags IncidentRags IncidentSaudRace IncidentSaudSeventy IncidentStatuses IncitentDispositions IncVehicleDispositions IncVehicleDispositions IncVehicleDispositions IncVehicleDispositions IncVehicleDispositions IncVehicleDispositions IncVehicleDispositions IncVehicleDispositions IncVehicleDispositions InfurySeures InterviewTypes	Language Visibility Custom English Language 1 Inactive Language 2 Inaktiv Language 3 00 Language 3 0 Langua

# Modify a Multi-Tier or Hierarchical Lookup List

- 1. Multi-tier lookup lists (rollups) appear in capital letters at the bottom of the list. Double-click on one rollup name to display the hierarchical list of its options on the right and see the associated forms at the bottom of the screen with the Language tab open by default.
- Expand the nodes of the rollup. Each rollup has up to four tiers of options for users to select from (e.g., the Class Rollup consists of Class, Category, Subcategory and Type).
  - The first tier is the **Root** of the rollup (e.g., Class in the Class Rollup). The option selected in the first tier determines what options are available in the second tier and so forth.
  - The higher tier in the hierarchy is the **Parent field**, while the lower tier is the **Child field**. For example, Class is the parent field to the Category child field.

- Any child fields that are on the same tier of the hierarchy are **Sibling fields**. In other words, all Class fields are siblings to each other; all Category fields are siblings to each other, and so on.
- 4. Select the type of modification required and follow the procedures below:
  - To delete an option from a rollup, select the option and click **Delete**. If the option has child fields, you must first delete all of the option's child fields before deleting the option itself. Note that you will be unable to delete any rollup options that are already saved in existing records. If this occurs, you can hide the value from visibility so users cannot choose the value from the lookup list when completing a record. See "Specify Workgroup Visibility for a Lookup List Value" on page 51 for further details.
  - To add an option to the first tier of a rollup hierarchy, click Add Root, or select one of the first-tier options (e.g., Criminal) and click Add Sibling.

Lookups		
🗄 🛃 Save 🛛 📝 Edit 🛭 👙 Refresh		
OfficerState OfficerTate OrgAddate OrgAddate OrgAnizations_infuluatityType OrgEnalTypes OrgPhroNementTypes OrgPhroneTypes OutcomeRemaryCoutes OutcomeRemaryCoutes OutcomeRemaryCoutes PresCatesTypes PresCatesTypes PresCatesTypes	*	New>     Orminal     Non-Cerrinal     Policy Volation     Procedural     Safety     diavy
Recidel Types Review Types Subject/wolvements Subject/wolvements SummayTypes TaskTypes VehicleColors VehicleSyles BUSINESSUNTROLLUPS CALLCATEGORYPOLLUPS GEOROLLUPS		Language ClassRollups Visibility Cutom English Faturel Language 1 Language 2 Language 3
ITEMCLASSROLLUPS ITEMMAKEMODELROLLUPS ORGROLLUPS SITEROLLUPS VEHICLEMAKEMODELROLLUPS		Add Root Add Child Add Sibling Delete



• To add an option to the second (or lower) tier of a rollup hierarchy, select one of the first-tier (or higher-tier) options (e.g., Failure) and click **Add Child** (e.g., Software).

Lookups		
🔄 🛃 Save 🛛 📝 Edit 👙 Refresh		
Office Te Office Te Organization Undfindustry Type Organization Types OrgEmailTypes OrgPhone Types OrgPhone Types Outcome/Phone Types Outcome/Phone Types PersAddress Types PersEmailTypes PersEnailTypes PersEnailTypes	4	Failure - <new> Cminal Non-Cminal Policy Volation Policy Volation Failure Failure T</new>
Persinvolvement Types Person Rags Persons_udf Race SevertyLevels Subject Involvements		Language ClassRollups Visibility Custom English Software 3
Supectitivovements Summary Types Task Types VehicleColors		Language 1
VehicleStyles VehinvolvementTypes BUSINESSUNITROLLUPS	ш	Language 2
CALLCATEGORYROLLUPS	1	Language 3
GEOROLLUPS ITEMCLASSROLLUPS ITEMMAKEMODELROLLUPS ORGROLLUPS SITEROLLUPS VEHICLEMAKEMODELROLLUPS	Ļ	Add Root Add Child Add Sibling Delete

• To add a new option to a tier that already contains other options, select an item in the tier (e.g., Software), and click Add Sibling (e.g., System).

Lookups		
🗄 🛃 Save 🛛 📝 Edit 🛭 👙 Refresh		
OfficerStat		Failure - <new></new>
OfficerTe OrgAddres Organization god IndustryType Organization Types OrgEmaiTypes OrgPhone Types OutcomePrimaryCauses OutcomePrimaryCauses OutcomeSecondaryCauses PersEmaiTypes PersEmaiTypes PersEnaiTypes		Ortminal     Policy Violation     Procedural     Software     Software     Software     Software
PersidTypes PersinvolvementTypes		Constant Charles Maller
PersonFlags		Language ClassRollups Visibility
Persons_udfRace SeverityLevels		Custom English System 3
SubjectInvolvements		
Summary Types Task Types		Language 1
VehicleColors		
VehicleStyles VehinvolvementTypes		Language 2
BUSINESSUNITROLLUPS	E	
CALLCATEGORYROLLUPS		Language 3
ITEMCLASSROLLUPS ITEMCLASSROLLUPS ITEMMAREMODELROLLUPS ORGROLLUPS SITEROLLUPS		Add Boot Add Child Add Shino Delete
ITEMMAKEMODELROLLUPS ORGROLLUPS	Ţ	Add Root Add Child Add Sibling Delete

5. Type the new option in the **Custom English** field (the default language for all lookup lists), or another language's corresponding text field to make the option exclusive to users of a particular language/label set. 6. Click Save.

# Specify Workgroup Visibility for a Lookup List Value

- 1. Double-click on the correct lookup list to see the associated forms at the bottom of the screen with the Language tab open by default.
- 2. From the lookup list, select the lookup value you would like to adjust workgroup visibility for. Some hierarchical lookups or rollups allow you to adjust visibility at the second level of the hierarchy as well as the first. In this case, expand the nodes at the root level to view further lookup options and select the option for which you wish to adjust workgroup visibility.
- 3. Open the **Visibility** tab. Note that this tab will not appear for ORGROLLUPS, because it is not possible to adjust visibility for organizational rollups.
- 4. By default, all lookup lists and their available options are visible to all workgroups. To permit specific workgroups to use the selected lookup option, first uncheck the **All Workgroups** box, and then click the checkboxes corresponding to the appropriate workgroups.
- 5. Click Save.

Lookups		
🗄 🛃 Save 🛛 📝 Edit 🛭 👙 Refresh		
OfficerSt OfficerSt OrgAdda OrgAdda Organization-rypes OrgInniTypes OrgInvolvementTypes OrgPhoneTypes OrgPhoneTypes OutcomePrimaryCauses Persons_udFace SeventyLevels SubjectInvolvements SummaryTypes	Faiture  Criminal  Policy Violation  Procedural  Safety  1	
Verincecolora	2 Language ClassRollups Visibility	
VehicleStyles VehinvolvementTypes	All Workgroups	
BUSINESSUNITROLLUPS CALLCATEGORYROLLUPS GEOROLLUPS ITEMCLASSROLLUPS ITEMCLASSROLLUPS ITEMMAKEMODELROLLUPS	F180       MSWG44       V Workgroup A         Feb18WG       MSWG45       V Workgroup B         Feb2 Smoke 1       Ontario       V Workgroup C         JD Workgroup       PPM-2000       Workgroup D         LAWG       reader       V Workgroup E	
ORGROLLUPS SITEROLLUPS VEHICLEMAKEMODELROLLUPS	Add Root Add Child Add Sibling Delete	)



## Enter Call Codes for the Call Category Lookup List

- Double-click on CALLCATEGORYROLLUPS at the bottom of the Lookups list and see all Call Category options on the right and the associated forms at the bottom of the screen with the Language tab open by default.
- 2. Expand the nodes in the Call Category rollup's list of options. Each category has up to three tiers available. Select the call categories (e.g., Administrative Tasks or Activated Alarm) and sub-categories (e.g., Document Delivery or Test Alarm) for which you want to specify the code.
- 3. Select the **Category Code** tab.
- 4. Input the appropriate code for the selected option in the Call Code field. The code entered will only be saved for the particular category or sub-category selected. To enter a code for a different level of the Call Category rollup, you must select the option and input the appropriate code individually. One way to approach call codes is to build codes for sub-categories (e.g., 500A for Document Delivery and 500AK for Confidential Document Delivery) upon the codes for categories (e.g., 500 for Administrative Tasks).
- 5. Select the appropriate **Default Priority** for each of the call categories. The priority selected will only be saved for the particular category or sub-category that you chose. To enter a priority for a different level of the Call Category rollup, you must select the option and input the correct priority marker individually.
- 6. Click Save.

Lookups		
🗄 🛃 Save 🛛 📝 Edit 🛭 参 Refresh		
OfficerTeam OrgAddressTypes Organizations_udfIndustryType Organization Types OrgEmailTypes OrgInvolvementTypes OutcomePrimaryCauses OutcomePersona_udfRace Person_udfRace PersonTitles PersonTitles PersoPhoneTypes RequestTypes ReviewTypes ReviewTypes SevertyLevels SubjectInvolvements SummayTypes TaskTypes VehicleColors VehicleStyles UvehicleStyles Uve	* II	Administrative Tasks - Document Delivery - Confidential  Administrative Tasks  Administrative Tasks  Confidentia  Confidentia  Off Site  Urgent  CallCode Default Priority  S00AK Default Priority
SITEROLLUPS VEHICLEMAKEMODELROLLUPS	-	Add Root Add Sibling Delete

### **Enter Address Information for the Site Lookup List**

- 1. Double-click on **SITEROLLUPS** at the bottom of the Lookups list and see all Site options on the right and the associated forms at the bottom of the screen with the Language tab open by default.
- 2. Expand the nodes in the Site rollup's list of options. Each Site has up to four tiers available. Select the Site, Building, Location or Section for which you want to specify the address.
- 3. Select the **SiteRollups** tab.
- 4. Input the appropriate address for the selected option in the Address, Country, State/Province, City and Zipcode/Postal Code fields. The address entered will only be saved for the particular Site, Building, Location or Section selected. To enter an address for a different level of the Site rollup, you must select the option and input the appropriate address individually.
- 5. The **Longitude** and **Latitude** fields will display the coordinates set for the Site available for any custom integrations using Integration Services.
- 6. If required, enter any important Site Notes for display in Perspective DispatchLog. Once stored for a specific site in Perspective, this text will be running on the Status bar in Perspective DispatchLog every time you select an Activity record that has its location set to this site.

2									() is posted in	00		Perspec	tive D	ispatchLog			J	
Start Start	Close	On Duty	Opi Off Duty	tions Dispatch Officer	Dispatch Organization	Arrive Actions	Arrive C All	- 🏠 Clear	Clear All	Activity Details	Officer Log	Attachme	nt S Record	SOP Refresh	🖊 Highligh 🏹 Filter	v	iew Statu ation	S Mai
ctivitie	-				1			I		1					T			
	Activity Nu	ımber		Priority	V	Location	7		Off Site		Call Ca	tegory	7	Reported Date	Officer S	tatus 🛛	Organizati	on V
	ACT-2011	-0001	42	1A		Alberta	1				Public D	isturbance		13/07/2011	Wait	ting	Waitin	)
	ACT-2011	-0001	41	Medium	1	Alberta	1				Area	Check		13/07/2011	Wait	ting	Waitin	,
	ACT-2011	-0001	51	5A		Acme		-			Activa	ted Alarm		3:17:25 PM	Wait	ting	Waitin	1
•							111											Þ
vailabl	-									Assigne								
	Officer Na			cation V	Call Sign		ficer Status	7	Team	<b>V</b> 0	ficer/Org	anization Na	me 🛛	7 Location		ll Sign	♥ Officer 5	itatus
P	atson-Par	ker,		h Columbia	PPM-002		ilable		Team 2									
Ca	age, Luke		Acme	University/	PPM-001	Ava	ilable		Team 2									
•				111					F	•		I	1					
3:1	27 PM							н	azardo	us ma	terial	Ls! <	F	•				

7. Click **Save**. The Site rollup address will now cross-populate for any Site/Location entered on any of the forms in the system and print on Incident and Activity reports. The particular address that appears on the forms and reports will be that of the lowest level in the record's Site rollup with an address entered in Perspective. For example, if a particular Site, Building and Location have been selected in a record and only the Site and Building have addresses entered in Perspective, the latter's address will appear on a form or a report.

Lookups												
🛿 🛃 Save 🛛 📝 Edit 🛷 Refresh												
OfficerStatuses OfficerTeam OrgAddressTypes Organizations_udfIndustryType OrganizationTypes OrgInvolvementTypes OrgInvolvementTypes OutcomePrimaryCauses OutcomeSecondaryCauses PersEndUrges PersFeatureTypes PersFeatureTypes	Acme University - Administration Building											
PersIdTypes PersInvolvementTypes	Northwest Territories	<b>T</b>										
PersonFlags	Language SiteRollups Visibility											
Persons_udfRace Person Titles PersPhone Types Priority	Longitude         Latitude          0.00         0.00	Country Canada										
ReportCategories	Address1	State\Province										
Request Types Review Types	1112 University Drive	Alberta 💌										
SeverityLevels SubjectInvolvements	Address2	City										
SummaryTypes	Administration Building	Edmonton 👻										
Task Types VehicleColors	Zipcode/Postal Code											
VehicleStyles	T1A 2B3											
VehInvolvementTypes BUSINESSUNITROLLUPS CALLCATEGORYROLLUPS CLASSROLLUPS	Site Notes Hazardous Materials!											
GEOROLLUPS ITEMCLASSROLLUPS ITEMMAKEMODELROLLUPS ORGROLLUPS												
SITEROLLUPS VEHICLEMAKEMODELROLLUPS		Add Root Add Child Add Sibling Delete										

# Activity Statuses and Officer Statuses (DispatchLog Only)

Note: This section refers to **DispatchLog** settings. For more information on the settings for **Dispatch**, visit the **Resolver Support** site.

The **Activity Statuses** Lookup, used in Activity and DispatchLog tasks, warrants special mention, as it behaves differently than its name may suggest. In effect, these statuses apply to both activities and officers, as in DispatchLog an Activity's status is usually determine by the status of the Officer(s) currently assigned to it.

#### The Relationship Between Activity Statuses and Officer Statuses

Adding new values to the Activity Statuses Lookup list doesn't strictly add statuses to activities as the name may suggest; these statuses are also tied directly to Officer Statuses.

Refer to **System values** below for a list of Activity Statuses already in the Perspective system.

Note: System Values cannot be deleted, though they can be renamed on a per-language basis.

Additional values added to this Lookup, due to the nature of how Activity and Officer Statuses relate, become new <u>Officer</u> Statuses. For example, if the custom value "On Lunch Break" is added, this status applies only to Officers and <u>not</u> Activities.

#### **System Values**

The following Activity Statuses are considered System values (i.e., they cannot be deleted):

- Available: Applies to Officers and denotes the associated Officer is available for assignment.
- **Busy**: Applies to Officers and denotes the associated Officer is on duty, but currently "busy" and cannot be assigned at this time.
- **Cleared**: Applies to Activities and denotes the assigned Officer(s) have been cleared and the associated Activity may be marked as Closed.
- **Closed No Report**: Applies to Activities and denotes the associated Activity is closed with no report required.
- **Closed Report Completed**: Applies to Activities and denotes the associated Activity was open, then had a report completed, causing it to close.
- On Hold: Applies to both Officers and Activities; denotes the assigned Officer considers the Activity "on hold" while the Officer completes his or her current assignment. This is considered a "temporary" status.
- **On Route**: Applies to both Officers and Activities; denotes the associated Officer is on route to the site of an assigned Activity.
- **On Scene**: Applies to both Officers and Activities; denotes the associated Officer is at the site of an assigned Activity.
- Open Report Required: Applies to Activities and denotes the associated Activity requires a report to be completed. The Activity status can only be move to Closed either once a report is complete (i.e., Closed – Report Completed) or a report is no longer required (i.e., Closed – No Report).

Note: To note an Activity's state further than Open or Closed, use **Activity Disposition** Lookup values.



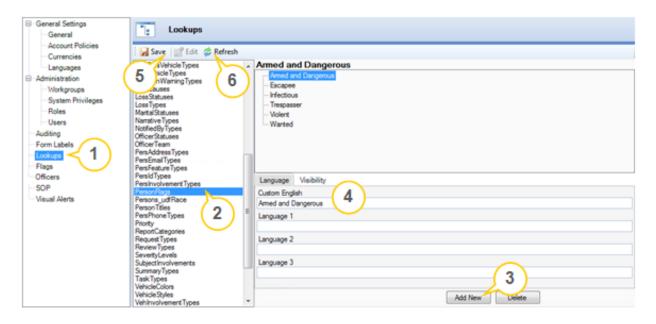
- **Out of Service**: Applies to Officers and denotes the associated Officer is considered "out of service" an unavailable in the field for any assignment.
- **Suspended**: Applies to both Officers and Activities; denotes the assigned Officer was either On Route or On Scene and was reassigned before the former Activity was cleared. The response is considered "suspended" until the officer is assigned; once that happens, the suspended response is then cleared. This is considered a "temporary" status.
- Waiting: Applies to Activities and denotes a new Activity awaiting an Officer assignment.



# Flags

# Add a New Incident or Person Flag

- 1. Select Lookups in the Navigation pane.
- In the Lookups list, double-click IncidentFlags if you wish to add a flag to the Incident form, or PersonFlags if you wish to add a flag to the Person form.
- 3. Click the **Add New** button at the bottom of the screen.
- 4. Type the name of the new flag in the **Base Language** field.
- 5. Click Save.
- 6. Click the **Refresh** button.



- 7. Select **Flags** in the Navigation pane.
- Specify the type of flags intended for editing by selecting either Incidents or Persons from the View Flags For lookup list.
- 9. Click Add.

- In the new flag form on the right, select the flag name you created earlier in the Lookups section on the Flag Description lookup list.
- 11. Enter a unique one-character designation for the flag in the **Flag Code** field.
- 12. To add an image to the new flag, click the **Add** icon 🕞 in the **Flag Image** field, select an image from the pop-up browser and click Open.
- 13. Click Save.
- To edit an existing flag, click Edit and proceed as described above. To delete a flag, go to the Lookups section, the IncidentFlags or the PersonFlags lookup, select the relevant flag's node and click Delete.

٣	Flags	
🚽 Sa	ve 🛑 Add 📝 Edit 🖳 Delete 🔞 Cancel	
	View Flags For: Persons -	Flag Code (1 Char only)
	A	A
-	Armed and Dangerous	Flag Description
~	R	Armed and Dangerous
~	Escapee	Flag Image
*	l Infectious	1 🛛 🔁
1	<b>T</b> Trespasser	
>	<b>V</b> Violent	
۴	<b>W</b> Wanted	



# **Standard Operating Procedures**

# Create a New Standard Operating Procedure Rule for an Activity

Using the Standard Operating Procedures (SOP) component of Administration, you can create a new SOP rule restricting it to a specific call category, site specifications and/or activity status. The created SOP rule will subsequently feature in Activity records that correspond to the settings specified in both Perspective's Activity data forms and the SOP component in DispatchLog or Dispatch.

NOTE: SOPs can be created directly in the Dispatch via the SOP administrative settings. You can still use Perspective SOPs; however, you can only create visual alerts for an SOP in Dispatch. See the Dispatch Administrator's Guide for more information.

In order to complete this operation, select **SOP** on the Navigation pane and follow the steps below:

- 1. Click Add. A blank SOP form will open with the General tab and the Description sub-tab open.
- 2. Start with specifying the official **SOP Name** in the required field.
- 3. Add a brief **Procedure Description** in the textbox below.

Standard Operating Procedures	
Enter filter text 🗙 🖌 🖶	Save Add Clinic Concel
Bomb Threat Bomb response procedures	Description Checklist Attachments Links Notifications
Fire Alarm Response	SOP Details
RIOT Disturbance Riot procedures	SOP Name Security Activity: Facility Check
Security Activity: Facility Check The routine facility check is performed	Procedure Description The routine facility check is performed at the end of every working day, at 18:00, to confirm the integrity of the system settings of computers on site.

- 4. To start defining the activity parameters that would trigger the SOP, open the Activity tab.
- 5. Click Add New.



- 6. In the new record window, specify the restrictive parameters for the activities that would trigger the SOP by entering the activity type's **Code** and/or the **Levels**. Make the parameters as specific as necessary (e.g., Security Activity, Security Activity/Verification\Check, etc.).
- 7. Check the **Active** box to restrict the SOP to active activities only.
- Restrict the location of the SOP-related activities by selecting their common Site, Building, Location and Section. Make the parameters as specific as necessary (e.g., Acme University, Acme University/Administration Building, etc.).
- 9. Check the **Off Site** box to implement the SOP to the off-site activities only.
- 10. Click **OK** to save the parameters for immediate activation of the SOP.
- 11. If required, add relevant SOP Checklist(s), Attachment(s), Link(s), and set up Notification(s).

🖉 Edit Record				- • •
OK Can	cel			
			Site 🔽 Active	
Code	Level 1		Site	
911C-4	Security Activity	<b>-</b>	Acme University	•
	Level 2		Building	
	Verification\Check	-	Administration Building	-
	Level 3		Location	
	Facility Check	-		<b>•</b>
			Section	
				<b>•</b>
			☐ Off Site	

12. Add as many activity parameters that match the SOP requirements as necessary and click Save. The next time an activity with the specified parameters is created the system will automatically activate the SOP option in Perspective and DispatchLog or Dispatch.

🚽 Save 🛛 🛑 Add	📝 Edit 🔀 Delet	e 🔞 Cancel		
General Activity				
• Add New •	Edit Remove			
Total Activities: 2				
SOP Name	Call Category	Site Rollup	Is Active	Is OffSite
Security Activity:	Security Activity/	Acme University/		
Security Activity:	Suspicious Activit	Alberta/Edmonto	<b>v</b>	V

# Add a Checklist for the SOP

- 1. Open the **General** tab, the **Checklist** sub-tab.
- 2. To specify the first checklist item, click **Add New**.
- 3. Enter the text of the initial recommended procedure and click **OK**.

🖶 Add N	ew Record		
ОК	Cancel		
	<b>* List Detai</b> l *List Name	ls	
Exan	nine possible m	odifications made to the system	

- 4. Add as many procedures that constitute your required SOP as necessary.
- 5. To re-arrange the position of items in the checklist, select the item of interest and click **Move Up** and **Move Down**, as required.
- 6. Click **Save**. The next time an activity with the specified parameters is created the system will automatically activate the SOP option in Perspective and DispatchLog or Dispatch and display the interactive checklist. In the Activity record, you will be able to check the completed actions.



🛃 Save   🖶 Add   📝 Edit 📉 Delete 😢 Cancel
General Activity
Description Checklist Attachments Links Notifications
Add New     Edit     Remove     O     Move Up     O     Move Down
Total Check List Items: 6
✓ Examine possible modifications made to the system
✓ Examine possible modifications to data
✓ Examine the facility for possible external tools a
✓ Look for possbile external tool output
✓ Review log files
✓ Check for systems possibly involved in intrusion a
5

# Attach a Relevant SOP File

- 1. Open the **General** tab, the **Attachments** sub-tab.
- 2. To attach a file related to the SOP, click Add New. A pop-up window will open.
- 3. Drag-and-drop the file you wish to attach into the window. Alternatively, click **Browse** to locate and select the file you wish to attach.
- 4. The **Attachment Title** field will automatically populate with the name of the attached file. If necessary, modify the name.
- 5. From the **Attachment Type** lookup list, select the appropriate designator for the attachment (e.g., Document, Picture, Video).
- 6. Give an overview of the attachment in the **Description** text box.
- 7. Click **OK** to upload the attachment. Once the upload is complete, click OK again to return to the record.



Include when printing?	Description
rd Operating Procedure-6-	12-15[1].pdf

- 8. Add as many attachments as necessary.
- 9. Click **Save**. The next time an activity with the **specified parameters** is created the system will automatically activate the SOP option in Perspective and DispatchLog or Dispatch and display the list of viewable attachments.
- 10. To view an attachment that has been added to the list, select it in the grid and click **View**. Then, click **Open** to see it, or **Save As** to save it on your computer.

	Edit 🔀 Delete 😧 Cancel
General Activity Description Checklist	Attachments Links Notifications
Total Attachments: 1	
<u>Add New</u>	Edit Remove View
Attachment Title Attach	ment Type File Name File Extension File Size Description
Standard Oper Docun	nent Standardpdf 137 KB
B Downloading Opening	Attachment Manager – 🗆 🗙
✓ Completed	Transferred 138 Kb/138 Kb
_	Save as Open

# Add a Relevant SOP Link

- 1. Open the **General** tab, the **Links** sub-tab.
- 2. To add a relevant SOP link to a file on your organization's commonly accessible local drive or an external Web URL, click **Add New**. A pop-up window will open.
- 3. In the Title field, enter a descriptor for the link you are creating.
- 4. If you are linking a local file, click the **Browse** icon, find the corresponding file and click **Open** to confirm the operation. If the link is a Web URL, paste the link into the **Link** field.
- 5. Click **OK** to add the link to the list.

Link		×
Ok	Close	
	Title	
	SOP for Handling Security Incidents at Acme University	
	Link	
	\desktop\standard operating procedure-3-22-06[1].pd 📄 🗙	

- Click Save. The next time an activity with the specified parameters is created the system will automatically activate the SOP option in Perspective and DispatchLog or Dispatch and display the links for reference.
- 7. To view the created link, select the link in the grid and click **View**. If the link is still valid, the file or URL will open.

General Activity
Description Checklist Attachments Links Notifications
= <u>Add New</u> = <u>Edit</u> = <u>Remove</u> = <u>View</u>
Total Links: 2
SOP for Handling Security Incidents at Acme University C:\Users\svetlana.remnyakova\Desktop\STANDARD OPERATING PROCE[
MIR3 inEnterprise Login Page <u>https://inenterprise.mir3.com/isp/security/showlogin.isp</u>

## Set Up Individual and Mass Notifications for the SOP

Using the Notification feature of Administration, you may set up multiple individual, as well as mass notifications that will be sent out once an activity with the previously **specified parameters** is created.

Mass notifications are available on DispatchLog using the MIR3 notification system and on Dispatch using the Everbridge notification system. Note that prior to using this feature, additional configurations must be made during the Perspective installation. See the Perspective installation and update guides on the Resolver Support site for more information.

1. Open the **General** tab, then the **Notifications** sub-tab.

- 2. Under **To** and **Cc** fields, specify the recipients' direct and the carbon copy email addresses respectively for the delivery of the individual notifications. You may either type the addresses in or click the relevant buttons and select the user(s) you wish to email the notification to from the list. If you're entering multiple email addresses, separate each email address with a semi-colon. Note that only the users with specified Primary Email Address will be available for the list selection.
- 3. Enter the **Subject** of the notification.
- 4. In the **Message** textbox, enter the SOP notification message.
- 5. To enable mass notifications:
  - If you're using DispatchLog and MIR3, select the notification from the **Notification Type** dropdown menu.
  - If you're using Dispatch and Everbridge, select the template from the Everbridge Notification Template dropdown menu.

For details on setting up mass notifications, see the Perspective installation and update guides on the Resolver Support site. See the appropriate MIR3 or Everbridge help documentation for additional information.

6. Click **Save**. The next time the appropriate activity is created, the system will automatically activate the SOP option in Perspective and DispatchLog or Dispatch and provide a form to send out the relevant notifications. In the Activity record, you will also be able to read the notifications that have previously been sent.



Save 🛛 🛑 A					
	dd 🛛 📝 E	dit 📉 Delete	😢 Can	cel	
General Acti	vity				
Description (	Checklist	Attachments	Links	Notifications	
Email Notifi	cation				
То	example <sup>*</sup>	123@example.co	om;exam;	ple456@example.com;example789@example.com	
CC					
Subject:	SOP for \$	Security Activity	: Facility	Check	
Message					
Activity: Sec		dministration Buil	ang		~
	facility chec	k must be perfor	med at the	e end of every working day at 18:00 to confirm the integrity of the system	
The routine f	facility chec	k must be perfor	med at the	e end of every working day at 18:00 to confirm the integrity of the system	<
The routine f settings of co	facility chec omputers or	k must be perfor	med at the	e end of every working day at 18:00 to confirm the integrity of the system	~
The routine f settings of co	facility chec omputers or	k must be perfor n site. Notification	ned at the	e end of every working day at 18:00 to confirm the integrity of the system	<
The routine f settings of co	facility chec omputers or Send Mass cation Type	k must be perfor n site. Notification	ned at the	e end of every working day at 18:00 to confirm the integrity of the system	<

# Visual Alerts (DispatchLog Only)

Note: This section refers to **DispatchLog** settings. For more information on the settings for **Dispatch**, visit the **Resolver Support** site.

Using the Visual Alerts section in the Administration module of Perspective, you can easily manipulate the display of specific types of information in Perspective DispatchLog<sup>™</sup>. For instance, you may highlight important or urgent data to easily prioritize information for the dispatcher.

Creating visualization settings contained in the Visual Alerts component of Administration you can customize the visual representation (i.e., set background color, text font and color, flashing, or time bars) of the following types of data:

- Officer Team: Fields with names of specific Officer Teams (e.g., Front Entrance, Lobby).
- Officer Status: Fields with specific Officers' Statuses (e.g., On Route, On Scene).
- **Organization Status**: Fields with specific Organizations' Statuses (e.g., Waiting, On Route, Cleared).
- **Priority**: Fields with specific activity Priority values (e.g., High, Medium, Low, Caution).
- Location: Fields with specific activity location (i.e., Site, Building, Location, Section) values (e.g., Site C/Building 1, Alberta/Edmonton/Downtown)

Moreover, using the **Regulated Time to Act** feature, you may set amounts of time to act for officers that have been assigned a specific officer status, have been placed to a specific location and/or dispatched for an activity with a specific priority. With an equivalent **Officer Alerts** feature, you may also specify the set amounts of time for officers' Status changes.

# **Define Visual Representation for Certain Data Types**

In order to set up visual alerts for the future use in Perspective DispatchLog, click **Visual Alerts** on the Navigation pane. Using the first five tabs of the component, you may define the visual representation (i.e., the font and the background color) for the fields that differentiate various **Officer Teams**, **Officer Statuses**, **Organization Statuses**, **Priorities** and **Locations**.

Activities									
Activity Number	Priority	♥ Officer Status ♥	RTA Start Dal Time R	Rer Call Category	Location	Off Site	Reported Date/	<b>Organization Status</b>	Description
ACT1-2011-000105	Low	Waiting		Security	Site B/Building 1		2:47 PM		Officer working at CapE
ACT1-2011-000101	Low	Waiting		General	Site C/Building 1		2:10 PM		Assist SPD with arrest o
ACT1-2011-08-00013	Extreme	Waiting		Dangerous Conditi	British Columbia		31/08/2011		
ACT1-2011-08-00012	Minimual	Waiting		Alarm	British Columbia		31/08/2011	On Route	
ACT1-2011-08-00010	Important	Waiting		Dangerous Conditi	British Columbia		31/08/2011		
ACT1-2011-000103	Minimual	On Scene		Security	Site D/Building 1		31/08/2011		Officer attending Toront
ACT1-2011-000005	High	Waiting		Bomb Threat			31/08/2011		
ACT-2011-000022	High	On Scene		Bomb Threat			15/08/2011	On Route	
ACT-2011-000020	High	On Route		Alarm/Panic	Site A		12/08/2011	On Route	

- 1. Open the appropriate tab (e.g., Officer Team, Priority, Location).
- 2. Click Add New.
- A blank alert window will pop up. In the lookup, select the descriptor(s) of the category for which you wish to edit the format (e.g., Officer Team, Priority, Site/Building/Location/Section). For Location, check the Off Site box to indicate that the location is off-site.
- 4. Using the color lookups, select the **Background** and the **Text Colors** for the field of the selected category.
- 5. Check the **Bold**, **Italic**, **Underline** and/or **Strikethrough** boxes to add further font effects.
- 6. Preview the resulting field view below and click **OK**, if the result corresponds to your expectations.

🕂 Add New Record	
OK Cancel	
Ste Acme University  Building Administration Building Location Section Section Section Section Section	Format Background Color Text Color Bold Italic Underline Strikethrough
	Preview
	Sample

7. Add as many visual specifications to as many of the available categories as necessary. Click **Save**.

Visual	Alerts					
🚽 Save 🛛 Car	ncel		_	_		
Officer Team	Officer Status	Organization Status	Priority	Location	Regulated Time To Act (RTA)	Officer Alert
Add New	= <u>Edit</u> = <u>F</u>	Remove				
Total : 5						
Preview	Off Site	Location	n			
Sample		Site C/Building 1				
Sample		Site D/Building 1				
Sample		Alberta/Edmonton				
Sample		British Columbia				
Sample		Acme University/Admin	istration Bu	ildina		

## Create a New Regulated Time to Act (RTA) Alert

To create a new RTA alert for a dispatched activity in Perspective DispatchLog, open the **Regulated Time to Act (RTA)** tab and define the settings of the alert (Officer Status, Location and activity's Priority). Once activated in DispatchLog, the settings defined for the alert will cause the RTA timer to start counting the time the dispatcher is left to check and modify the status of the dispatched officer.

For example, you may set a specific regulated time to act (e.g., 10 minutes) for a "High Priority" activity for which an officer has been dispatched with the status "On Scene" who has now reached the location "Acme University/Administration Building". Then, as soon as the officer under all these conditions is dispatched for a matching activity in DispatchLog, the dispatcher will see the timer on their screen counting the time during which the officer is supposed to respond to the current combination of conditions.

If, for some reason, the officer failed to respond about their status change during the allotted period of time, the timer will start counting the time the officer spends in the set conditions after the RTA expiry, advancing in negative values. The display of the RTA time bar will change to flashing red to alert the dispatcher on the absence of an adequate response to the activity.

Note: The only obligatory condition for the timer to set on is the allocation of an RTA alert to a particular **Officer Status**. The officer's location and priority of the activity the officer is involved can be optionally added to restrict the set of activities to the particular combination of settings.

tivities											
Activity Number	Priority	Officer Status	RT	A Alert	Time Remaining	Call Category	Location	Off Site	Reported Date/	<b>Organization Status</b>	Description
ACT1-2011-00010	Low	Waiting				General	Site C/Building 1		01/09/2011		) with arrest of.
ACT1-2011-08-0001	Extreme	Waiting				Dangerous Condit	British Columbia		31/08/2011		
ACT1-2011-08-0001	Minimual	On Scene				Alarm	British Columbia		31/08/2011	On Route	
ACT1-2011-08-0000	Important	On Route	1	57 %	00:00:30	Emergency Call/91	Alberta		31/08/2011		
ACT1-2011-08-0000	Minimual	Waiting	-			Escort	Alberta		31/08/2011		
ACT1-2011-000103	Minimual	On Scene				Security	Site D/Building 1		31/08/2011		ending Toronto
ACT-2011-000020	High	On Route				Alarm/Panic	Site A		12/08/2011	On Route	
					RTA Alert	Time Rem	aining				
					41 %	00:00:	17				
					11 70	00:00:	17				
			Ч	-	21 %	00:00:					

To create a new RTA alert, follow the steps below:

- 1. Click Add New. A new entity form will pop up.
- 2. Specify the **Site**, **Building**, **Location** and/or **Section** for which you are setting the alert, selecting as many restrictive location options as necessary from the lookups. Check the **Off Site** box, if necessary.
- 3. Set the **Officer Status** that is intended to initiate the timer of the alert.
- 4. Make the timer respond to a particular activity priority by specifying the **Priority** setting for the alert.
- 5. Define the amount of time during which the dispatcher is supposed to respond to the activity with the set combination of conditions under the **Time Allowed** fields.
- 6. Click **OK**. The RTA table will populate with the new activity alert.

Add New Record	
OK Cancel	
RTA Details	
Site	Officer Status
Acme University -	On Scene 👻
Building	Priority
Administration Building 🔹	High 👻
Location	
East Wing 👻	Off Site
Section 🗸	Time Allowed (less than 24hrs)       0 1 hr       10 3 hr
Leave Site Rollup blank to apply alert to any site selection	

7. To edit an RTA alert, select it in the grid and click **Edit**. To delete an alert, select it in the grid and click **Remove**.

Save 🔞 Cance	el					
Officer Team C	)fficer Status Orga	anization Status Priority Location	Regulated Time	To Act (RT	TA) Officer Alert	
Add New	Edit Remove					
Tetel 2						
Total : 3 Officer Status	Priority Code	Site Rollup	0	ff Site	Time Allowe	ed
Total : 3 Officer Status On Route	Priority Code Extreme	Site Rollup British Columbia	0		Time Allowe	ed
Officer Status	-		0	□ 3		ed

# **Create a New Officer Alert**

To create a new time alert for an officer in Perspective DispatchLog, open the **Officer Alert** tab and define the settings of the alert (Officer Status and Location). Once activated in DispatchLog, the settings defined for the officer alert will cause the available or assigned officer's RTA timer to start counting the time the officer is left to act in the set status and/or at the set location.

For example, you may set a specific regulated time to act (e.g., 20 minutes) for an officer whose status has switched to "On Scene" and who has now reached the location "British Columbia". Then, as soon as these conditions activate in DispatchLog for this officer, the dispatcher will see the timer on their screen that will count the time for the officer to respond to the current combination of conditions before their status must be modified.

If, for some reason, the officer failed to respond about their status change during the allotted period of time, the timer will start counting the time the officer spends in the set conditions after the time alert expiry, advancing in negative values. The display of the time bar will change to flashing red to alert the dispatcher on the absence of an adequate response from the officer.

As with the RTA alerts for activities, the only obligatory condition for the officer's timer to set on is the allocation of a time alert to a particular **Officer Status**. The officer's location can be optionally added to restrict the population of officers to the particular location.

	Team 🛛	Call Sign	Officer/Organization <sub>マ</sub> Name	Status 🖓	ActivityID	Location $\nabla$	Time Elapsed	2
Ş P	<sup>23</sup>	133A	Dargie, Nancy	On Route	ACT1-2011-000417		5d 23h	
8		PPM-002	Watson-Parker, Mary-Jan	On Route	ACT1-2011-000416	Acme University/Administration	2d 23h	
R P	2	130B	Sieben, Jeff	On Scene	ACT1-2011-000414		00:00:09	, T

To create a new Officer alert, follow the steps below:

- 1. Click Add New. A new entity form will pop up.
- Specify the Site, Building, Location and/or Section for which you are setting the alert, selecting as many restrictive location options as necessary from the lookups. Check the Off Site box, if necessary.

00:09:19

- 3. Set the **Officer Status** that is intended to initiate the timer of the alert.
- 4. Define the amount of time during which the officer is supposed to respond to the activity with the set combination of conditions under the **Time Allowed** fields.
- 5. Click **OK**. The Officer Alert table will populate with the new officer alert.

🕂 Add New Record	
OK Cancel	
RTA Details	
Site	Officer Status
Acme University -	Patrol 👻
Building	
Administration Building 🔹	
Location	
	□ Off Site
Section	Time Allowed (less than 24hrs)           0         hr         20         min         0         s
Leave Site Rollup blank to apply alert to any site selection	



6. To edit an officer alert, select it in the grid and click **Edit**. To delete an alert, select it in the grid and click **Remove**.

Save 🔞 Cano	el						
Officer Team	Officer Status	Organization Status	Priority l	ocation	Regulated Time	To Act (RTA)	Officer Alert
Add New	Edit Ren	nove					
Total : 3							
Total : 3 Officer Status		Site Rollup	Offs	õite		Time Allowed	I
Officer Status	Alberta	Site Rollup	Offs		<b>.</b>	Time Allowed	I
	Alberta British Colur					Time Allowed	1



# Language

The Language section allows you to set Perspective's operating language and, if desired, custom help files.

Note that the language and custom form label settings in the Perspective desktop application are also applied to the Perspective Mobile iOS app.

## Languages

The Languages section—not to be confused with "Language" above it—allows you to set language names and associated help paths for fields.

Note that Perspective comes pre-installed with a default language (**System English**) and associated help files. Only set additional languages if you need either new English terminology or non-English languages.

Eanguage -> Configuratio	n
Configuration Form Labels	
🚽 Save	
Base Language	Dictionary English (United States)
Healthcare	Admin Help Path
Education	Ilanguages/en_us/help/perspectiveadminh
Casino/Hotel	User Help Path          /languages/en_us/help/perspectiveuserhel          /p/perspectiveuserhelp.htm
Language 4	
Language 5	
Language 6	

#### Set Languages and Help File Paths

- 1. Select a dictionary to use in the **Dictionary** drop down box.
- 2. In the Admin Help Path and User Help Path fields, type the path for the language's associated help files, or click the Browse (...) button and browse to the appropriate file on your computer or network.



#### 3. Click Save.

## **Form Labels**

The Form Labels section provides lists of text fields that display throughout the Perspective interface, and are tied to the selected Perspective language. In order to set new or modify existing labels, open the **Form Labels** component, under **Language**, in the Navigation pane. On the right pane, a list of text fields will be displayed that specifies the selected entity. The first two columns of the list provide the string **ID** and the default **System English** label for each text field.

#### **Create a Single Custom Label Set for All Users**

- 1. Use the Language to Search section to bring up the field names you wish to change.
- 2. Enter your custom field label in the Base Language text field. The Custom English column will automatically populate with the new field label. As soon as a new label name is added to the Custom English column, Perspective defaults to this name rather than the original System English label. If you would prefer to have different users see different field labels, refer to the Create a Custom Label Set for Each User Group in Your Organization chapter for more information.
- 3. Continue assigning custom field labels.
- 4. Click **Save**. The next time any user without an assigned custom language logs on, they will see the new Custom English labels rather than the original System English labels.

#### **Create a Custom Label Set for Each User Group in Your Organization**

- 1. Use the Language to Search section to bring up the field names you wish to change.
- 2. Enter your custom field label in the text field that corresponds to the customized language that you created previously.
- 3. Continue re-labelling fields for your customized language. The column for your customized language will automatically populate with the new field labels you create.
- 4. Click **Save**. If you have already assigned your customized language to some users, your custom field labels will appear the next time they log on.



#### **Create Custom Report Footers**

Custom report footer labels are normally hidden from view, as the labels themselves are blank, and therefore not searchable.

Report footers are added to the end of a report and are listed in Perspective as **Custom Footer 1** and **Custom Footer 2**. **Page Footer 1** is added to the bottom of each report page.

1. Under the **Language to Search** section, drill-down to **Reports**, then **Labels**. The third drill-down contains the custom report footers.

Eanguage -> Form Labels
Configuration Form Labels
🚽 Save 🧔 Refresh
Language to Search:
Base Language 🗸 🗸
Reports 🔻 🗙 🔻
Labels 🔻 🗙 🔻
₹ X -
Custom Footer 1
Custom Footer 2
Page Footer 1

- Custom Footer 1 appears in bold at the end of a report.
- **Custom Footer 2** appears as a sub-heading to Custom Footer 1. Custom Footer 2 is not bolded.
- **Page Footer 1** appears in small text at the bottom left of every page.
- 2. Enter custom footer text in the language label sets required.

The following sample report shows custom footers in effect:



This is Custom Footer 1. This is Custom Footer 2. Merspective by PPH 2000		Incident Record Created By PPM2000, 9/1 Last Modified By FKennedy, 12/1	
Owner Workgroup: Doons This is Page Footer 1.	Access Level: Level 1 (Lowest)	Local Print Date/Time: 2/5/2013 2:13 PM	Page 1 of 1

# **Gateway Administration**

Once a member of your organization has submitted an electronic report to the Gateway or imported a file into the Gateway, the Gateway Administrator and/or Gateway Approver are responsible for the assessment of the report.

Note: Incident, Item, Person, Organization and Vehicle reports can be imported through the Import Manager.

Before any of the steps in this reporting process take place, the Perspective Administrator must first permit workgroups to import files into the Gateway and/or grant Perspective e-Reporting and/or Web Portal access to workgroups, as well as authorize Gateway Administrators and Gateway Approvers to perform their associated Gateway functions.

Note: For more information on these roles and what they entail, consult the Perspective User's Guide or Perspective's online User Help.

In this guide, the term e-Incident refers to the electronic reports submitted both via Perspective e-Reporting (the so-called e-Reports), and via the rest of the possible Perspective's electronic submission methods, such as Perspective's Web Portal.

# Specify Gateway File Import and/or e-Reporting Access Options for a Workgroup

In order to enable smooth data communication between Perspective's electronic submission devices and Perspective Gateway, the Perspective's Administrator must permit workgroups to import files into the Gateway and/or grant e-Reporting and/or Web Portal access to appropriate workgroups.

- The workgroups that will be working with Perspective e-Reporting should have limited visibility to GeoRollups (see the "Specify workgroup visibility for a lookup list" chapter for details). Large lists may cause e-Reporting to hang or crash.
- Select Workgroups in the Navigation pane, choose the correct workgroup from the list, and click Edit.
- 2. Check the Enable Imports to this Workgroup checkbox. The Gateway opens by default.

R © Resolver Inc

- 3. Under the **Gateway** tab, start specifying Gateway file import options for the workgroup by providing the workgroup with a unique **Import Key**. This import key will act as an added security measure, restricting imports to the authorized workgroup only.
- 4. In the **Incident Settings** section below, specify a unique **Incident Prefix** for all of the workgroup's e-Incidents. For example, WEB for e-Reports and EINC for some other type of electronic reports (e.g., reports from Perspective Web Portal).
- 5. Choose an **Incident Identifier Format** from the lookup list:
  - CCYY-MM-#####: This format identifies the e-Incident by the calendar year (CCYY) and month (MM) that the report was submitted to the Gateway, followed by a five digit sequential number that re-sets at the beginning of each month. For example, 2011-03-00123 identifies the 123<sup>rd</sup> e-Incident submitted to the Gateway in March 2011.
  - CCYY-######: This format identifies the e-Incident by the calendar year (CCYY) that the report
    was submitted to the Gateway, followed by a six digit sequential number that re-sets at the
    beginning of each year. For example, 2011-004567 identifies the 4567<sup>th</sup> e-Incident submitted
    to the Gateway in 2011.
  - ###########: This is known as flat file format. There is no year or month preceding the number. The first e-Incident submitted to the Gateway will be identified by the number 0000000001, and this sequential numbering will continue indefinitely with no re-set.

NOTE: Identifier Prefixes are recorded and reset in GMT time.

- 6. Specify an **Accepted Retention Period** and a **Deleted Retention Period** for how long imported Item, Person, Organization or Vehicle reports should remain in the Gateway after they have been accepted or deleted by the Gateway Approver or Gateway Administrator.
- Indicate how long imported e-Incidents should remain in the Gateway after they have been made available or deleted by the Gateway Administrator or Gateway Approver under Available Retention Period and Deleted Retention Period.
- 8. Under Added Retention Period, specify how long imported Item, Person, Organization or Vehicle reports should remain in the Gateway after they have been added to the main Perspective database by authorized users.

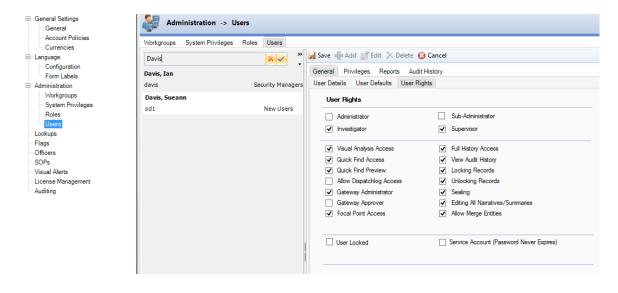
- 9. In the **General Record Settings** section, check the **Auto Accept** box to automatically accept every Item, Person, Organization or Vehicle report that the workgroup imports, making them available for authorized users to add to the Perspective database. If this box is not checked, the workgroup's imported reports will undergo the normal Gateway review process by a designated Gateway Administrator or Gateway Approver prior to being made available or being deleted.
  - This box does not apply to imported Incident reports. Incident reports must always undergo Gateway assessment and review before being accepted into the Perspective database.

#### 10. Click Save.

Administration -> Workgroups	
Workgroups System Privileges Roles Users Officers	
Enter filter text 🗙 🗸 🖨	🛃 Save 🖶 Add 📝 Edit 🔜 Delete 😮 Cancel
45WG	Workgroup Name         Organization           Advanced Users         III, Advanced Security Inc.
Administrator - PPM2000 Workgro Internal Admin	Workgroup Description The members of this workgroup have advanced security rights.
Advanced Users	
The members of this workgroup have ad	-
	Identifier Prefixes Incident Prefix Case Prefix Activity Prefix INC CASE ACT
	Enable Imports to this Workgroup     Gateway     e-Reporting
	Import Key ppm2000
	Incident Settings
	Incident Prefix Incident Identifier Format WEB CCYY-MM-#####
	Accepted Retention Period Deleted Retention Period
	Keep indefinitely                 Delete after 90 + get days.            Delete after 90 + get days.            Delete after 90 + get days.
	General Record Settings
	Available Retention Period Auto Accept
	<ul> <li>Keep indefinitely</li> <li>Delete after 90 days.</li> </ul>
	Deleted Retention Period
	Keep indefinitely     Keep indefinitely       Image: Constraint of the set of the se
<b>∢</b> ∢ 1/3 ▶ ▶	

# Assign Access Rights to a Gateway Administrator or Gateway Approver

- 1. Select **Users** in the Navigation pane.
- 2. Select the correct user from the list, and click Edit. By default, the General tab will open.
- 3. Open the **User Rights** sub-tab.
- 4. Check the **Gateway Administrator** box or the **Gateway Approver** box to grant the user access to their associated Gateway functions.
- 5. Click **Save**. The next time the designated Gateway Administrator or Gateway Approver logs on to Perspective, they will be able to access the Gateway component from the Navigation pane.



# **Administrative Reports**

Perspective contains a number of pre-set reports that you may use to generate statistics and analyze trends in your data, and many of them have been designed specifically for Administrators.

For information on the types of reports available in Perspective, including administrative reports, and on how to generate reports, please, refer to the "Reports" section of the Perspective User's Guide or online User Help.

To read more about administering report access for roles and users, see **Set Report Visibility for a Role** and **Set Report Visibility for a User** in the "Roles" and "Users" sections of this guide.



# Service Manager

The Service Manager is an external application available only on the Web server hosting Perspective services. It is used to manage configuration files, databases, licenses and keys, as well as to set up the following features:

- **Email Notifications**: Perspective's default email settings can be configured for SMTP integration.
- Attachment Sizes: The maximum attachment size allowable in Perspective (up to 2 GB) can be tailored to your organization's needs.

Note: Microsoft SQL Server 2005 Express (supported for the Standard Edition of Perspective only) has a maximum attachment allowance of 50 MB.

- **Quick Find Indexing**: The Quick Find tool requires regular indexing of your Perspective database for search accuracy.
- User Defined Fields: User defined fields can be added to the Incident, Case (Perspective Premium only), Item, Person, Organization and Vehicle forms under the General tab; to the Incident and Case forms under the Controls tab; and to the Incident form under the Involved Persons, Involved Items, Involved Organizations, Involved Vehicles and Investigation Details tabs.
- **Custom Search Integration**: With the Custom Search feature, you can launch the Infoglide Identity Resolution Engine<sup>™</sup> (IRE) from Perspective to search several data sources at once.
- Mass Notification: With the mass notification feature, you can integrate your MIR3<sup>™</sup> inEnterprise<sup>™</sup> solution into Perspective in order to launch notification via Perspective DispatchLog. This will require the Service URL, User Name and Password provided by MIR3
- Integration Services URL: To enable event trigger in Integration Services, enter the URL set up with the Integration Services.

For further information on any of the features listed above, including detailed setup instructions, please, refer to the Perspective Installation Guide.

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