

SmartAdmin

Version 9.4

User Manual

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For technical support or questions concerning this manual, please call (800) 374-0101.

CTS America

180 N. Palafox Street
Pensacola, Florida 32502 *Local:* 850-429-0082 *Toll Free:* 1-877-SMARTCOP (762-7826) *Web:* www.cts-america.com *Fax:* 850-429-0522

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Chapter 1 SmartAdmin Introduction

Version 9.4

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Technical Support

Toll Free:877-SMARTCOP (762-7826)E-mail:support@cts-america.comWeb:www.cts-america.com

Fax: 850-429-0522

CTS America's support staff is available via a toll-free number 24 hours a day, 7 days a week, including holidays.

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Introduction

Company History

SmartCOP, Inc. (d/b/a CTS America) was founded by an experienced software engineer. Development of the core products began in 1994 when the engineer became a sworn law enforcement officer and recognized the lack of functionality in the existing public safety technology. This engineer determined that the only way to properly achieve functionality was through the development of a comprehensive, integrated software suite that provided real-time, critical information to first responders. The engineer also realized that the software functionality needed the input of those persons involved in the day-to-day process; that is, deputies, troopers, investigators, dispatchers, paramedics, firemen, administrators, and court clerks. Rather than dictate what an agency should utilize, CTS America listened to and created what its users demanded. The end result: a system that supports the mission of public safety agencies rather than hindering it.

Since then, the CTS America team of engineers have enhanced and expanded the core products into one of the most comprehensive, integrated product suites available. In fact, the company actively and successfully competes in all size markets, with products that scale from an agency of ten officers to thousands of officers.

Company Mission

CTS America has a single and simple goal: To support the mission of the agencies we serve.

To accomplish this goal, we do everything possible to make sure our customers do not perceive us as a vendor, but rather consider us a partner. We ask our customers to dictate the growth and direction of our technology, instead of having engineers dictate the procedures of our customer agencies.

Most importantly, we never lose sight of the core values that have guided our company since our formation:

- We value and implement customer feedback.
- We value and implement the highest of ethical business practices.
- We treat our employees, business partners, and customers with respect at all times.
- We value and implement diversity at all levels.
- We understand that we have a duty and obligation to always place community and agency safety above profit.

User Assistance Tools

Help

A complete Help system is included with CTS America software that includes step-by-step procedures, tips, and shortcuts. The Table of Contents, Index, and Free-Text Search are displayed with each topic.

Training

Training is conducted on-site by the very people who use and depend on this technology (e.g., officers train officers, dispatchers train dispatchers, etc.).

Support

CTS America's help desk provides support 24 hours a day, 7 days a week. Call toll-free 1-800-374-0101 for assistance.

Manual Conventions

Before beginning use of CTS America software, it is important to understand the terms and typographical conventions used in this manual. The following table outlines the general these conventions:

Format	Usage
Courier New Font	Text entered at a given step
	Example: Type LL100 in the Command Line
Bold	Indicates the tab, button, menu, or menu item on
	which to click
	Example: Click on the Assignments tab.
[Bold]	Indicates a key or key combination to be pressed
	Example: Click Add or press [Alt+A].

Keyboard Shortcuts and Menu Options

If the CTS America module provides keyboard shortcuts, a Keyboard Shortcuts and Menu Options chart explains the shortcuts and menus for the main activities you will perform using the software. The chart provides a quick reference to learn alternative ways to accomplish a task. If you prefer using the keyboard to using the mouse or vice versa, refer to this chart.

Error Reporting

Each SmartADMIN module uses EurekaLog, an error reporting software tool that is transparent to users unless a software-related error occurs. The application may run for years without ever getting a EurekaLog error. However, if an error that should be reported to CTS America personnel does occur, a distinctive error message. EurekaLog errors have two specific identifying characteristics.

- The error message will contain three buttons: Terminate, OK, and Details.
- The message will contain two checkboxes: *Send this error via Internet* and *Attach a Screenshot*.

Although providing additional information regarding a EurekaLog error is optional, doing so is helpful to CTS America staff in troubleshooting. If you get a EurekaLog error, use the following steps to provide more information on how the error occurred.

- 1. Ensure Send this error via Internet is checked and click OK.
- 2. Enter a brief description of the activity being performed in SmartADMIN when the error occurred.
- 3. Click OK.

The details entered and a screenshot of the SmartADMIN module window when the error occurred are sent to CTS personnel.



✓ When contacting support after such an error, please have the date and time of the error available so the error details can be pulled quickly and easily.



Chapter 2 Employee Master

Version 9.4

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CTS America

180 N. Palafox Street
Pensacola, Florida 32502 *Local:* 850-429-0082 *Toll Free:* 1-877-SMARTCOP (762-7826) *Web:* www.cts-america.com *Fax:* 850-429-0522

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Overview

About Employee Master

The *Employee Master* module is used to track and record personnel information. It plays an integral role in the CTS America software suite. All CTS modules use information from *Employee Master* to assign officers to offense reports, calls, and other law enforcement-related activities, and to identify personnel and equipment. *Employee Master* can also be used to page individuals or specific groups of employees.

Employee ID cards, record reports, and phone directories can be printed, as needed.

Software Version Number

The contents of this chapter support Employee Master version 9.4.

User Assistance Tools

Help

The details here-in are general and not agency-specific. Depending on agency configuration, all information provided may not apply from one agency to another.

Training

Training is conducted on-site by the very people who use and depend on this technology (e.g., officers train officers, dispatchers train dispatchers, etc.).

Support

The CTS America Customer Support Team is available 24 hours a day, 7 days a week. Call toll-free 1-800-374-0101, option 1 for assistance. The Customer Support Team can also be contacted by e-mail for non-critical issues at support@cts-america.com.

About CTS America

Company History

Formerly known as SmartCOP Inc., CTS America was founded by an experienced software engineer. Development of the core products began in 1994 when the engineer became a sworn law enforcement officer and recognized the lack of functionality in the existing public safety technology. This engineer determined that the only way to properly achieve functionality was through the development of a comprehensive, integrated software suite

that provided real-time, critical information to first responders. The engineer also realized that the software functionality needed the input of those persons involved in the day-to-day process: deputies, troopers, investigators, dispatchers, administrators, and court clerks. Rather than dictate what an agency should utilize, CTS America listened to and created what its users demanded. The end result: a system that supports the mission of public safety agencies rather than hindering it.

Since then, the CTS America team of engineers have enhanced and expanded the core products into one of the most comprehensive, integrated product suites available. In fact, the company actively and successfully competes in all size markets, with products that scale from an agency of ten officers to thousands of officers.

Company Mission

Our mission is to provide real-time information with increased functionality to enable users to interact with the public they serve with increased safety, effectiveness and efficiency. CTS America has accomplished this by rapidly adapting and modifying complex integrated data systems to provide its customers with the most advanced, comprehensive software solutions proven to reduce crime, increase safety, and boost efficiency.

Contact CTS America

Phone toll-free: 1-800-374-0101

Fax: 850-429-0522

E-mail address: support@cts-america.com

Website: http://www.cts-america.com

Physical Address: 180 North Palafox Street, Pensacola, FL 32502

Using Employee Master

Logging In and Out

Logging In

- 1. Double-click the *Employee Master* icon on the desktop.
- 2. Enter a user name and password.
- 3. If desired, place a check beside **Change Password after login** to change the password.
 - If a password change is requested, the use will be required to enter and confirm the new password.
- 4. Press [Enter] or click Login.

Logging Out

Upon clicking the "X" at the top right, clicking on **File**>**Exit**, or pressing **[Alt+X]**, the user is automatically logged out of *Employee Master*.

Keyboard Shortcuts and Menu Options

Main Application

To Do This	Press This Key	Or Use the Mouse Here
Print an employee's ID badge	N/A	File>Print>ID Card
Print an employee phone directory	N/A	File>Print>Employee Phone Directory
Print an employee record	[Ctrl+P]	File>Print>Employee Record
Add a new employee record (viewing user listing)	[Insert]	Add New Employee button, or Edit>Add New Employee
Add a new role (viewing role listing)	[Insert]	Add New Role button, or Edit>Add New Role
Delete a role (viewing role listing	[Delete]	Delete Role button, or Edit>Delete Role
Archive the selected employee record	[Ctrl+A]	Edit>Archive Current Employee, or Right-click the employee record and select Archive Current Employee
Restore the selected archived employee record	[Ctrl+U]	Edit>Unarchive Current Record, or Right-click the archived record and select Unarchive Current Record
Assign a call number to an employee	[Ctrl+C]	Edit>Assign Active Call Number, or Right-click the employee record and select Assign Active Call Number
Assign a future call number to an employee	[Ctrl+F]	Edit>Assign Future Call Number, or Right-click the employee record and select Assign Future Call Number
Remove a call number	N/A	Edit>Remove Call Number, or Right-click the employee record and select Remove Call Number

To Do This	Press This Key	Or Use the Mouse Here
Update all call numbers with configured future call numbers	N/A	Edit>Move Future Call Numbers to Active Call Numbers, or Right-click an employee record and select Move Future Call Numbers to Active Call Numbers
Reverse the last update of all call numbers with configured future call numbers	N/A	Edit>Undo Last Move of Future Call Numbers to Active Call Numbers, or Right-click an employee record and select Move Future Call Numbers to Active Call Numbers
Open an Employee Record	[Enter]	View Employee Record button, or Double-click the desired record, or Edit>View Employee Record
Sort the Employee List	N/A	View>Sort>[Sort Column], or Click the Sort Button and choose a column by which to sort, or Click the column by which to sort
Access Help	[F1]	Click Help>Help
Page a Person	[Alt+P]	Page Person button, or Paging>Page Person
Page a Group	[Alt+G]	Page Group button, or Paging>Page Group
View/Hide Archived Records	N/A	Options>Hide Archived Records
View/Hide Non-Users	N/A	Options>Hide Non-Users
Display Users	N/A	Display Users button, or Options>Display>Users
Display Roles	N/A	Display Roles button, or Options>Display>Roles
Exit Employee Master	[Alt+X]	Exit button, or File>Exit, or Red "x" at the top right

Within Employee Records

To Do This	Press This Key	Or Use the Mouse Here
View/Edit General Information	N/A	General Information tab
View/Edit Personal Information	N/A	Personal Information tab
View/Edit Emergency Contact Information	N/A	Emergency Contact tab
View/Edit Agency ID Information	N/A	Agency IDs tab
View/Edit Employee Attributes	N/A	Attributes tab
View/Edit Vehicle Assignment	N/A	Vehicle Assignment tab
View/Edit Employee Picture	N/A	Employee Picture tab
View/Edit Employee Signature	N/A	Employee Signature tab
View/Edit User Access levels	N/A	User Access tab
View/Edit CIC Information	N/A	CIC tab
View Record Modification History	N/A	History tab
Edit User Information (most tabs, except <i>User Access</i>)	N/A	Edit Information button, or Edit>Edit User Information
Edit User Settings (User Access tab only)	N/A	Edit User Settings button, or Edit>Edit User Settings
Edit User Access Levels (User Access tab only)	N/A	Edit User Access Levels button, or Edit>Edit User Access Levels
Close Employee Record	[Esc]	Exit button, or File>Exit, or Red "x" at the top right

Searching Employee Files

Employee Master offers allows users to search employee records by *Name*, *ID Numbers*, *Assigned Positions*, *Address/Phone*, *Vehicle*, *Attributes*, *Employment*, or a combination thereof.

Name

	Search							
I	Name (1)	ID Numbers (2)	Assigned Positions (3)	Address/Phone (4)	Vehicle (5)	Attributes (6)	Employment (7)	
	Last Name	e				Soundex		
	First Name	2						
	Middle Na	ime			Log	gin Name		

The *Name* tab is automatically selected when *Employee Master* opens. Use it to search for an employee by name or login.

- 1. Enter the Last Name, First Name, Middle Name, or Login Name, as available. Enter as much information as possible to narrow search results.
- 2. Place a check beside **Soundex** to include similar sounding items to be included in the search.
- 3. Click Search. All records matching the criteria are listed.
- 4. Double-click the desired employee record or select it and press **[Enter]** to open the record.

ID Numbers

earch					
Name (1) ID Numbers (2) Assigne	d Positions (3) A	ddress/Phone (4)	Vehicle (5)	Attributes (6)	Employment (7)
Personnel No. Disable Formatting Employee ID Social Security Number					
Badge No.	Call No. Active	Future Last			
Agency ID	ID Type	`			
P I					

Use this option to search all employee records by various ID numbers.

Use only one of the ID numbers for any given search.

- 1. Select the *ID Numbers* tab.
- 2. Enter the search criteria.
- 3. Click **Search**. All records matching the criteria are listed.
- 4. Double-click the desired employee record or select it and press **[Enter]** to open the record.



- ✓ The *Personnel Number* field automatically populates with the first several characters of the number as configured for the agency in the current year (i.e. SRSO14PER). This can be changed, as needed for the purposes of the search.
- ✓ Place a check beside **Disable Formatting** to manually enter information in the *Personnel Number* field. When checked, all characters must be entered, no portions of the number will automatically populate.

Assigned Positions

Search						
Name (1) ID Num	oers (2) Assigne	d Positions (3)	Address/Phone (4)	Vehicle (5)	Attributes (6)	Employment (7)
Agency		Rank				
	~		~			
Division		Assigned Stati	ion			
	~		~			
Unit		Unit Position		Unit Type	2	
	~		~			~

This tab is used to search employees based upon their assigned positions within the agency.

- 1. Click on the Assigned Positions tab.
- 2. Choose the Agency, Rank, Division, Assigned Station, Unit, Unit Position, or Unit Type, as available, from the drop-down menus provided.
- 3. Click Search. All records matching the criteria are listed.
- 4. Double-click the desired employee record or select it and press **[Enter]** to open the record.

Address/Phone

Search						
Name (1)	ID Numbers (2)	Assigned Positions (3)	Address/Phone (4)	Vehicle (5)	Attributes (6)	Employment (7)
Street						
City	State	Zip C	ode Phone N	lumber (All)	Phone E	đ
		~				

Use this tab to search for an employee by address or phone number.

- 1. Click on the **Address/Phone** tab.
- 2. Enter the **Street**, **City**, **State**, **Zip Code**, and **Phone Number**, as available. Enter as much information as available to narrow search results.
- 3. Click **Search**. All records matching the criteria are listed.

4. Double-click the desired employee record or select it and press **[Enter]** to open the record.

Vehicle

Search		
Name (1) ID Numbers	(2) Assigned Positions	(3) Address/Phone (4) Vehicle (5) Attributes (6) Employment (7)
Car No.	Tag No.	Confidential Tag No. VIN
Make	Model	Color
		✓

Use this tab to search employee records based upon the vehicle assigned in *Fleet Management*.

- 1. Click on the **Vehicle** tab.
- 2. Enter the **Car Number**, **Tag Number**, **Confidential Tag Number**, Vehicle Identification Number (VIN), Make, Model, or Color, as available.
- 3. Click Search. All records matching the criteria are listed.
- 4. Double-click the desired employee record or select it and press **[Enter]** to open the record.



- ✓ If searching by *Car Number*, *Tag Number*, *Confidential Tag Number*, or *VIN*, use only one of the criteria for the search.
- ✓ The *Make*, *Model*, and *Color* criteria can be used together.

Attributes

Search								
Name (1)	ID Numbers (2)	Assigned Pos	sitions (3)	Address/Phone (4)	Vehicle (5)	Attributes (6)	Employm	nent (7)
Attribute	1	Attr	ribute 2		Attribute	3		
		¥		~			~	
Attribute	4	Attr	ribute 5		Attribute	6		
		¥		~			~	

Use this tab to search employee records based upon attributes assigned in *Employee* Master.

- 1. Click on the **Attributes** tab.
- 2. Use the six **Attribute** drop-down menus to enter the search criteria. Enter as much information as is available to narrow search results.

- 3. Click **Search**. All records matching the criteria are listed.
- 4. Double-click the desired employee record or select it and press **[Enter]** to open the record.

Employment

Search								
Name (1)	ID Numbers (2)	Assigned Positions (3)	Address/Pho	one (4)	Vehicle (5)	Attributes (6)	Emplo	oyment (7)
Hire Date		Appoint	ment Date			Termination Dat	e	
I	∨ to	¥	∨ to		~		✓ to	~
Terminati	on Reason							
		~						

Use this tab to search employee records based upon employment history with the agency.

- 1. Click on the **Employment** tab.
- 2. Use one of the available search criteria.
 - a. **Hire Date**: Enter a beginning and end date for the date spread during which the target employee(s) was hired.
 - b. **Appointment Date**: Enter a beginning and end date for the date spread during which the target employee(s) was appointed to the current position.
 - c. **Termination Date**: Enter a beginning and end date for the date spread during which the target employee(s) was terminated.
 - d. **Termination Reason**: Choose the reason for termination from the dropdown menu.
- 3. Click Search. All records matching the criteria are listed.
- 4. Double-click the desired employee record or select it and press **[Enter]** to open the record.

Performing an Advanced Search

- 1. Place a check beside **Adv Search** to use multiple search tabs for more specific results.
- 2. Enter search criteria in all necessary tabs (<u>Name</u>, <u>ID Numbers</u>, <u>Assigned Positions</u>, <u>Address/Phone</u>, <u>Vehicle</u>, <u>Attributes</u>, <u>Employment</u>).
- 3. Click on the **Advanced** tab to verify search criteria.
- 4. Press [Enter] or click Search. All matching records are listed.
- 5. Double-click the desired record or select it and press [Enter] to open the record.

Saving Search Criteria

Search criteria that will be used frequently can be saved to the user's employee profile so that it can be used at a later time without re-entering the search criteria. A saved search is kept until deleted by the user by whom it was created.

- 1. Perform a standard or advanced search, verifying that results can be obtained.
- 2. Click Save Search. A new line appears in the Saved Searches pane.

Saved Searches							
🔍 Search 1							

3. Replace the default name with a brief title describing the search criteria or goal thereof.



- \checkmark Hover the mouse over a saved search folder to reveal the search criteria.
- \checkmark Double-click a saved search to run it.
- ✓ Right-click a saved search folder and select **Rename** to change the name of the saved search.
- ✓ To delete a saved search, right-click on it and select **Delete**.

Sorting Search Results

The order in which records are listed in the grid can be modified to aid in finding the desired record. The list can be sorted by *Agency Tag*, *Assigned To*, *Assignment Date*, *Car Number*, *Category*, *Color*, *Confidential Tag*, *Make*, *Model*, Owner Applied Number (*OAN*), *Odometer*, *Odometer Type*, *Style*, *Vehicle Number*, Vehicle Identification Number (*VIN*), or *Year*. Three methods are available for sorting.

- Right-click on the grid and select a column by which to sort from the context menu.
- Click on the *Options* menu and select **Sort**, then select a column by which to sort from the menu.
- Left-click on the column by which the list should be sorted.

Managing Employee Records

9				9	SmartO	OP EN	IPLO'	YEE/UNIT MA	STER FILE				×
File	Edit	View Option	s Paging	Help									
Vi	Image: Notice Call Number I												
Name (1) ID Numbers (2) Assigned Positions (3) Address/Phone (4) Vehicle (5) Attributes (6) Employment (7) Adv Search Last Name													
	Name			Agency	Active	Call # Future	Last	Rank	Office	Ext	Pager	Phone Number Cellular	rs ^
►	, COMFD			GBPD	comfd								
	ABBOTT,	PAUL		OCSO				SPECIAL	(850)			(850)	
	ABERNAT	THY, THOMAS	JOHN SR	SRSO	W7895		945	CONTRACTOR	850456	54	78945655	(584)656-9656	8
	ADAMS, A	APRIL		SRSO	QWQW		12584	LEO					
	ADAMS, H	KRISTA H		SAO	8000		0001	SPECIAL					
	ADKINS, E	BARBARA E		SAO	0009		0002	SPECIAL					
	AGAN, KA	AREN ELIZABE	тн	GSPD					(404)624-7785				(
	AKRIDGE,	KAREN		GSPH									
	ALACHU	A, SHERIFF'S C	FFICE	ACSO	1598		1600	SPECIAL					
	ALDRIDGE, DEBORAH LASHAWN		SRSO	0653		653	DET DEPUTY	(850)983-1143					
	ALEXANDER, AMBER DENICE		SRSO	2012			CIVILIAN						
	ALFORD, LINDA C.		GSPH					(478)987-2116				(
	ALLBRITTON, PATSY HIGHTOWER		SRCC				LE CAPTAIN						
	ALLEN, BENJAMIN MICHAEL		HAEL	SRSO	170		178	LE DEPUTY	(850)983-1229				
<	<							>					
Lo	Login Name: SMAHAFFEY Access: AR (All Agencies)												

Creating Employee Records

1. Click Add New Employee. The Add/Edit Employee Record window opens.

Add/E	dit Employee Record 🛛 🗕 🗖 🗙
Personnel No.	Agency Last Name
First Name	Middle Name Title
SSN	Employee ID
Office Phone	Office Ext Cellular/Mobile Phone
Pager	Pager Type No Pager •••
Voice Mail	Voice Mail Ext Fax Number
Email	Apparatus
Unit Type	Other
	✓ <u>O</u> K X Cancel
- 2. Choose the **Agency** from the drop-down menu. Once all information has been entered, the *Personnel Number* is generated based upon the agency chosen (i.e. SRSO14PER000001).
- 3. Enter the Last Name, First Name, and Middle Name for the new employee.
- 4. If applicable, enter a Title. This would be such suffixes as Jr., Sr., II, III, etc.
- 5. Enter the employee's Social Security Number (**SSN**). Ensure the accuracy of this information. If the employee will be functioning in a capacity where CIC queries will be performed, the SSN is used to verify their access to CIC information.
- 6. Enter the **Employee ID**. This is used for internal use.
- 7. Enter an **Office Phone** and **Extension**, **Cell Phone**, **Pager** and **Pager Type**, **Voice Mail** number and **Extension**, and **Fax Number**, as applicable and available.
- 8. Enter the employee's **Email** address in the field provided.
- 9. If the employee record is not being created for a person, but rather for a vehicle or other unit, place a check beside **Apparatus**. This is usually utilized for setting up medical and fire units in *SmartCAD*.
- 10. Choose a **Unit Type** by clicking on the ellipsis (...) beside the field. If none of the unit types available apply, enter the unit type in the **Other** field.
- 11. When all information has been entered, click OK.
- 12. A message displays asking if the new user should have a login name and password.



To give this user access to CTS applications, click **Yes**. To add the user to *Employee Master* without providing software access rights, click **No**. If the user will not have application access, skip to step 15.

- 13. Depending upon agency configuration, after clicking **Yes** on the confirmation message, one of two potential screens can appear.
 - a. A prompt is given for the designation of a username.

Add New User Access Profile	
Network Login Name	
OK Cancel	

1) Enter the Network Login Name and press [Enter] or click OK.



- 2) Enter a password and click **OK**, OR click **Cancel** to set the password to be the same as the user name.
 - If *Cancel* is clicked, a message displays advising how the password was set.

	Emp/Unit Master File	x
ι	Jsing UserName as password.	
	ОК	

b. If Windows Authentication for CTS applications is enabled, a prompt will appear to choose an active directory account to link to the CTS profile.

Select a Windows Authen	dows User Account to h this employee and continue.
aadams AADAMSS A-ADAMSS abooker abooker abotnick ABOTNICKS ACCOUNTING acrowder ACROWDERS ACROWDERS ADAMSS ADAMSS ADAMS7S adminbackup Administrator	adminscan 2 / AGENCY-DATAS 2 AGIIlette 2 AGIILETTES 2 AGILLETTES 2 AGILLETTES 2 AGILLETTES 2 AGILLETTES 2 AGILLETTE-DEL 2 AGILLETTE-VOS 2 AGILLETTE-WSV 2 AGILLETTE-WSV 2 AGILLETTE-WSV 2 AGOLDFREY-PCS 2 AGODFREY-PCS 2 AL-04S 2 AlachuaSO 2 alaster 2
<	OK Cancel

- 1) Select a network account.
- 2) Click OK.

The *Employee Details* window opens. All information entered into the *Add/Edit Employee Record* window is automatically populated in the *Employee Details* window.

Refer to <u>General Information</u> to complete this part of the employee record.

When finished editing the employee record, click Exit or close the window.



- ✓ On the main *Employee Master* window, the user can also right-click on the records list and select **Add New Employee** to begin adding an employee record.
- ✓ If the user name entered is refused by the system, enter a different user name until a valid selection is made.
- ✓ If an existing employee that is not a user requires a user login at a later time, open the employee's record.
 - When viewing the *General Information* tab, click **Edit Information**.
 - Click Add Login Name.

The application will prompt to set the user name and password as with during profile creation.

✓ An employee record without a configured user name will not contain a *User Access* tab.

General Information

🗐 Er	mployee Details - MC	GUIRE, KATHI	RYN LISELLE [S	RSO14PERS0004	4]	- 🗆 🗙
File Edit View Help						
Image: Second state 123 Edit Information Assign Active		Change Passw	ord Change F	⊘ ∎ Role <u>H</u> elp E <u>x</u> it		
Vehicle Assignment	Employee Picture	Employee Si	gnature	User Access	CIC	History
General Information	Personal Information	n En	nergency Contact	Agency	IDs	Attributes
Login Name: KMCGUIRE First Name Middle KATHRYN LISEL	e Name Last Nam LE MCGUIR	e E	(Jr, Sr, etc.) Full MCG	Name/Description GUIRE, KATHRYN LISI	ELLE	
Rank D	ivision	Hire Date	Appointed Date	Employment Termi	nation Date	and Reason
Call No Unit Position	Position Cl	assification	•	De	efault Unit R	Role
Office Phone Extension (850)429-0082 Pager ID Pac	Cellular/Mobile Phone (850)123-4567 gerType Paging Pager ····	Voice Mail Pl Gateway	none Extension	Secondary Contac Employee ID KLM37	t Number F	ax Number
Assigned Station	··· Apparat	Unit Type us LAW		E-Mail Address shawn.mahaffe	y@cts-amer	ica.com
Agency Primary Unit Assic SRSO ··· SHF/CHF/MAJ/O	gnment PS/PATROL	Di ••• A	spatch DM •••	SMTP		
Radio Assigned	Badge Number	Geo View Tem	plate	POP		
			~			
Icon	Ot	her Units & Pagi	ng Groups		Unit Positio	on
NOTE: All visual repre	esentations			•••		•••
of units that have bee	en associated			•••		•••
with this unit type wi iconic representation	ll include this			•••		•••
				•••		•••
Change <u>I</u> con Cl	ea <u>r</u> lcon					•••

The *General Information* tab is selected by default when an employee record is accessed. When creating a new record, information entered in the *Add/Edit Employee Record* window is automatically populated in the appropriate fields.

1. Click Edit Information.

2. Click the ellipsis (...) beside the *Rank* field to choose the employee's rank.

Rank	×
Search Characters	
CIVILIAN	^
CIVILIAN SUPERVISOR	
CONTRACTOR	
CORPRAL	
CRT SEC DEPUTY	
CSO OFFICER	
CUSTODIAN	
DIRECTOR	
EXPLORER	
GRAND MASTER	
INTERN	
LEO	~

Scroll through the available ranks to find the needed rank or begin typing the rank in **Search Characters** to skip to that rank in the list. Once found, double-click the rank or highlight itand press **[Enter]** to return to the employee record.

3. Click the ellipsis (...) beside the *Division* field to choose the employee's assigned division.



Scroll through the available divisions to find the needed division or begin typing the division name in **Search Characters** to skip to that division in the list. Once found, double-click the division name or highlight it and press **[Enter]** to return to the employee record.

- 4. Enter the employee's **Hire Date**, in the format of MM/DD/YYYY, or select the date from the drop-down calendar.
- 5. If the employee was appointed to a new position, enter the **Appointment Date**, in the format of MM/DD/YYYY, or select the date from the dropdown calendar. This date should be changed whenever the person's appointed rank or position is updated.
- 6. Click the ellipsis (...) beside the *Unit Position* field to choose the employee's assigned position.



Scroll through the available positions to find the needed position or begin typing the position name in **Search Characters** to skip to that position in the list. Once found, double-click the position name or highlight it and press **[Enter]** to return to the employee record.

7. Click the ellipsis (...) beside the *Position Classification* field to choose the employee's assigned classification.

Position Classification	×
Search Characters	
ADMINISTRATIVE CLERK I	^
ADMINISTRATIVE CLERK II	
ADMINISTRATIVE CLERK III	
BOOKING CLERK	
BOOKING CLERK II	
BOOKKEEPER, ASSIST.	
CAPTAIN LAW ENFORCEMENT OPERATIONS	
CIVIL PROCESS SERVER	
CIVIL PROCESS SUPERVISOR	
COMMUNICATIONS DISPATCHER I	
COMMUNICATIONS DISPATCHER II	
COMMUNICATIONS DISPATCHER SHIFT LEADER	×

Scroll through the available classifications to find the needed class or begin typing the class name in **Search Characters** to skip to that class in the list. Once found, double-click the class name or highlight it and press **[Enter]** to return to the employee record.

8. Click the ellipsis (...) beside the *Default Unit Role* field to choose the employee's default unit role when assigned to an incident in *SmartCAD*.

	[Default Unit Role	x
<u>S</u> ea	arch Characters		
	CSI	CRIME SCENE INVESTIGATION	^
	CTS-AMERICA	PRIDE OF LAW ENFORCEMENT	
	DIVER	DIVE TEAM	
	ENGINEER	ENGINEER TEAM	
	FTO	FIELD TRAINING OFFICER	
	GM	Grand Master	
	HONOR	HONOR GUARD	
	IA	INTERNAL AFFAIRS	
	К9	K9 OFFICER	
	MC	MAJOR CRIMES	
	QA	QUALITY ASSURANCE	
	SPANISH	SPANISH TRANSLATOR	\mathbf{v}

Scroll through the available classifications to find the needed class or begin typing the role name in **Search Characters** to skip to that role in the list. Once found, double-click the role name or highlight it and press **[Enter]** to return to the employee record.

9. If the Office Phone Number, Mobile Phone Number, Voice Mail Phone, and Fax Number fields were filled out on the *Add/Edit Employee Record* window. These fields are already populated. If available, enter a Secondary Contact Number.

- 10. If applicable, enter pager information.
 - a. Enter the Pager ID. This would be the pager number.
 - b. Choose the **Pager Type** by clicking on the ellipsis (...) to display the drop-down menu. This designates the type of page the pager can receive: *Numeric Only* (only numbers) or *Alpha/Numeric* (accepts letters and numbers).
 - c. Click the ellipsis beside the *Paging Gateway* field to choose the pager's service provider.

Paging Gateway Assignment	×
Search Characters	
<u> </u>	
Alitel	^
AT&T	
Nextel	
SouthernLinc	
Sprint	
T-Mobile	
Verizon	
	×

Scroll through the available service providers to find the needed provider or begin typing the provider in **Search Characters** to skip to that provider in the list. Once found, double-click the service provider or highlight it and press **[Enter]** to return to the employee record.

- 11. Enter an identification number to uniquely identify this employee in **Employee ID**.
- 12. Enter the person's **E-Mail Address**. This will also need **SMTP** (outgoing) and **POP** (incoming) server information.
- 13. Click the ellipsis beside the *Assigned Station* field to choose the employees primary assigned station.

2041011 0114140.010		
D1	DISTRICT 1	
D2	DISTRICT 2	
D3	DISTRICT 3	
D4	DISTRICT 4	
D5	DISTRICT 5	
D6	DISTRICT 6	
D9	DISTRICT 9	
QA	QUALITY ASSURANCE	
QA1	INSPECTION	

Scroll through the available stations to find the needed station or begin typing the station name in **Search Characters** to skip to that station in the list. Once found, double-click the station name or highlight it and press **[Enter]** to return to the employee record.

- 14. If *Apparatus* should have been checked on the *Add/Edit Employee Record* window, and was not, place a check beside **Apparatus** here.
- 15. Click the ellipsis (...) beside the *Unit Type* field to choose the type of unit from the drop-down menu: LAW, FIRE, or EMS.
- 16. The *Agency* is automatically populated based upon the agency chosen on the *Add/Edit Employee Record* window. Click the ellipsis beside the *Primary Unit Assignment* field to choose the employee's primary unit.

	Primary Unit Assignment			×
<u>S</u> e	earch Characters			
▶	SHF/CHF/MAJ/OPS/PATROL	SRS	ADM	^
	SHF/CHF/MAJ/OPS/PATROL/D1	SRSC	1	
	SHF/CHF/MAJ/OPS/PATROL/D2	SRSC	2	
	SHF/CHF/MAJ/OPS/PATROL/D2/INV	SRSC	2	
	SHF/CHF/MAJ/OPS/PATROL/D3	SRSC	3	
	SHF/CHF/MAJ/OPS/PATROL/D4	SRSC	4	
	SHF/CHF/MAJ/OPS/PATROL/D4/INV	SRSC	4	
	SHF/CHF/MAJ/OPS/PATROL/D5	SRSC	5	
	SHF/CHF/MAJ/OPS/PATROL/K9	SRSC	К9	
	SHF/CHF/MAJ/OPS/PATROL/RESERVES	SRSC	SDE1	
	SHF/CHF/MAJ/OPS/PATROL/TRAFFIC	SRSC	TRAF	
	SHF/CHF/MAJ/SPS	SRSC	ADM	¥

Scroll through the available assignments to find the needed assignment or begin typing the assignment name in **Search Characters** to skip to that assignment in the list. Once found, double-click the assignment or highlight it and press **[Enter]** to return to the employee record.



✓ Changing the Agency has far-reaching effects. The immediate effect is the clearing of any information in the Primary Unit Assignment and Dispatch fields.

However, it can also affect whether or not other administrators can access the employee record and whether or not the employee can fully access applications according to permission levels. 17. Click the ellipsis beside the *Dispatch* field to choose the employee's primary dispatch area.

	Primary Dispatch Location	×
<u>S</u> earch Cha	racters	
ADM	ADMINISTRATIVE	^
AIR	AIRCRAFT	
INV	INVESTIGATIONS	
SRO	SCHOOL RESOURCE	
BEAC	BEACH PATROL	
BOAT	MARINE UNIT	
CRIM	CRIME SCENE	
MILT	MILTON CITY	
NARC	NARCOTICS	
SDET	SPECIAL DETAIL	
SOPS	SPECIAL OPS	
SWAT	SWAT TEAM	×

Scroll through the available dispatch areas to find the needed area or begin typing the area name in **Search Characters** to skip to that area in the list. Once found, double-click the dispatch area or highlight it and press **[Enter]** to return to the employee record.

- 18. If applicable, enter the employee's Radio Assigned and Badge Number.
- 19. Select the appropriate **GEO View Template** from the drop-down menu. In multi-agency configurations this is the GEO view corresponding with the employee's assigned agency. For officer's using *SmartMCT*, this affects what appears on the CAD view.
- 20. Icons can be associated with unit types from within *Employee Master* from the *Icon* pane.
 - a. Click on Change Icon.
 - b. Browse for the icon file (ICO file type) on the local computer, a USB drive, or a network location.
 - c. Double-click the file or highlight it and click **Open**.



- \checkmark An icon can be cleared using the *Clear Icon* button.
- \checkmark Icons are assigned to unit types, not individual personnel.
- 21. Paging in *Employee Master* is usually performed based upon unit assignments. While the *Primary Unit Assignment* and *Unit Position* fields designate the employee's main duties, to five secondary unit assignments and positions can also be assigned.

a. Click the ellipsis (...) to the right of the first empty field under *Other Units & Paging Groups*.

Secondary Unit Assignm	nent	×
Search Characters		
ADMIN	SRS(^
INV	SRSC	
INV/NARCOTICS	SRSC	
S.W.A.T.	SRS(SOPS	
SHF	SRSC ADM	
SHF/CHF	SRSC ADM	
SHF/CHF/CORRECTIONS	SRSC ADM	
SHF/CHF/FISCAL	SRSC ADM	
SHF/CHF/MAJ	SRSC ADM	
SHF/CHF/MAJ/INV/COURT SECURITY	SRSC SDE1	
SHF/CHF/MAJ/OPS	SRSC SOPS	
CHEVCHE MAALZODC /INIV	SBSC INV	5

Scroll through the available assignments to find the needed assignment or begin typing the assignment name in **Search Characters** to skip to that assignment in the list. Once found, double-click the assignment or highlight it and press **[Enter]** to return to the employee record.

b. To the right of the paging group, under *Unit Position*, click the ellipsis to the right of the field to choose the employee's position in the group.



Scroll through the available positions to find the needed position or begin typing the position name in **Search Characters** to skip to that position in the list. Once found, double-click the position name or highlight it and press **[Enter]** to return to the employee record.



 \checkmark The employee ID field is limited to a maximum of 6 characters.

- \checkmark Phone numbers are automatically formatted with parentheses and hyphens.
- ✓ If the area code is not included in the phone number entry, the agency's default zip code is automatically inserted.
- ✓ To delete an employee's primary unit assignment, rank, position classification, unit position, pager type, or paging gateway, select the appropriate field and press [Delete].
- ✓ When an employee is terminated, enter a **Termination Date** and **Reason**.
- ✓ If the upload of an invalid icon image is attempted to an employee's record, a message will indicate that the selected image is invalid, and the icon will not be stored in the database. If an invalid image already exists in the database, the message "Invalid Icon Image" will appear on the employee's record instead of the icon.

Personal Information

E	mployee Details - MO	GUIRE, KATHRYN L	ISELLE [SRSO	14PERS000)44]	- 🗆 🗙
File Edit View Help					-	
Edit Information Assign Active	<u>C</u> all # Change User Name	e Change Password	Change Role	Help Ex	el jit	
Vehicle Assignment	Employee Picture	Employee Signatur	e User	Access	CIC	History
General Information	Personal Informatio	on Emergen	cy Contact	Agen	cy IDs	Attributes
Social Security Number 123-45-6789			C	omments		^
Race Sex	DOB	Blood Typ	e			
Home Address		7				
Address						
City	State Zi	p Code				
Mailing Address (Blank if Sam	e as Above)					
Address						
City	State Zi	p Code				
Phone	Unlisted?					
Formerly Known As						
Classification of Special Skills						
						× .

The *Personal Information* tab is used to store confidential vital statistics about the employee.

- 1. Click on the **Personal Information** tab.
- 2. Click **Edit Information** in the toolbar.

- 3. The **Social Security Number** field is populated with the SSN entered on the *Add/Edit Employee Record* window. Double-check the number for accuracy.
- 4. Select the employee's **Race** and **Sex** from the drop-down menus.
- 5. Enter the employees Date of Birth (**DOB**) in the field provided. This can be done manually, in the format of MM/DD/YYYY, or by clicking the down arrow to navigate to the date in the drop-down calendar.
- 6. Enter the employee's **Blood Type**.
- 7. Enter the employee's *Home Address*, including the street **Address**, **City**, **State**, and **Zip Code**.
- 8. If the *Mailing Address* is different from the *Home Address*, enter the information including the street **Address** (or PO Box), **City**, **State**, and **Zip Code**.
- 9. Enter the employee's home **Phone** number. Enter Y or N beside **Unlisted?** to indicate whether or not the number is listed.
- 10. If the employee has previously been known by any other name (such as a maiden name or alias), enter the name in **Formerly Known As**.
- 11. If the employee possesses any special skills, enter them in **Classification of Special Skills**.
- 12. Enter any additional information in the Comments field.

Emergency Contact

🗐 Er	mployee Details - MCG	UIRE, KATHRYN LIS	Selle (SRSO1	4PERS00044	4]	- 🗆 🗙
File Edit View Help				A 4		
Edit Information Assign Active	Call # Change User Name	Change Password	Change Role	🕜 📭 <u>H</u> elp E <u>x</u> it		
Vehicle Assignment	Employee Picture	Employee Signature	User A	Access	CIC	History
General Information	Personal Information	Emergency	/ Contact	Agency	Ds	Attributes
Emergency Contact Name:						
Relation:						
Work Phone:						
Work Address						
Home Phone:						
Home Address:						
Notifier:						
<u> </u>						

This tab, as the name suggests, is used to record contact information for use in the event that the employee is in a medical emergency, generally. Traditionally, this is a family member or significant other.

- 1. Click on the **Emergency Contact** tab.
- 2. Click Edit Information in the toolbar.
- 3. Enter the **Emergency Contact Name** (as designated by the employee) who will be notified in the event of any emergency situation that involves the employee.
- 4. Enter the contact's **Relation** to the employee (spouse, boyfriend, girlfriend, etc.).
- 5. Enter the contact's **Work Phone** and **Work Address**. Include the city, state, and zip code to provide a complete address.
- 6. Enter the contact's **Home Phone** and **Home Address**. Include the city, state, and zip code to provide a complete address.
- 7. Enter the name of the designated **Notifier** in the field provided. This may be assigned by the agency or at the employee's request.

Agency IDs

	E	mployee Details - MCG	GUIRE, KATHRYN LI	ISELLE [SRSO	14PERS00044]	- 🗆 ×
File Edit	View Help					
Edit Inform	123	Call # Change User Name	Change Parsword	Change Pole	🕜 📭	
Eult mon	ation Assign Active	e Call # Change Oser Name	Change Password	Change Kole		
Vehic	le Assignment	Employee Picture	Employee Signature	e User	Access CIC	History
Gen	eral Information	Personal Information	Emergeno	cy Contact	Agency IDs	Attributes
Date	ID	Ту	/pe			^
						*
ID:		_				
Comme	nt:					
						~
						~
	dd 🙁 🙆 <u>C</u> ancel	* <u>D</u> elete				

The *Agency IDs* tab is used to create additional Agency IDs that have not been otherwise defined. ID types are configured in *Master Configuration*.

- 1. Click on the **Agency IDs** tab.
- 2. Click Edit Information in the toolbar.
- 3. Click on **Add** at the bottom to add a new ID.

If ID types have been configured, a pop-up window appears to allow the user to select an ID type to add.

What type of ID do you want to add?	×
Search Characters	
Description	^
Contract	
Explosive Ordinance Expert	
K-9 Handler	
Technician	
	~
✓ <u>O</u> K X Canc	el

If ID types have not been configured, a message will display informing the user there are no configured ID types from which to choose.

- 4. Scroll through the available ID types to find the needed ID or begin typing the ID type name in **Search Characters** to skip to that ID type in the list. Once found, double-click the ID type name or highlight it and click **OK** or press **[Enter]** to return to the employee record.
- 5. Enter the ID number in the **ID** field beneath the listing. The number and type will appear on the list with the date the ID was added to the record.

- \checkmark Once an ID is added only the *ID* value may be edited.
- ✓ Click **Cancel** to back out unsaved changes to an ID.
- ✓ Click **Delete** to remove the ID from the employee record.

Attributes

File Edit View Help I23 Image: Change Dassword Image: Change Role Image: Change Role Edit Information Assign Active Call # Change User Name Change Password Change Role Vehicle Assignment Employee Picture Employee Signature User Access CIC History General Information Personal Information Emergency Contact Agency IDs Attributes ID Description Escription Employee Employee Employee	•
I23 I23 Edit Information Assign Active Call # Change User Name Change Password Change Role Help Exit Vehicle Assignment Employee Picture Employee Signature User Access CIC History General Information Personal Information Emergency Contact Agency IDs Attributes ID Description	^
Vehicle Assignment Employee Picture Employee Signature User Access CIC History General Information Personal Information Emergency Contact Agency IDs Attributes ID Description Attributes ID Description ID Description ID ID<	^
General Information Personal Information Emergency Contact Agency IDs Attributes ID Description	^
ID Description	^
ID Description	
< > >	
Add Remove	

The *Attributes* tab is used to assign characteristics to the employee record. Primarily, these aid dispatchers in assigning officers to CAD incidents. The attributes are configured in *Master Configuration*.

- 1. Click on the **Attributes** tab.
- 2. Click on **Edit Information** in the top toolbar.
- 3. Click Add at the bottom. The *Attribute Lookup* window appears.

	Attribute Lookup	
ID	Attribute Description	^
CTSA	CTS-AMERICA	
EOD	EXPLOSIVE ORDINANCE DETACHMENT	
EVN	ENVIRONMENTAL PROTECTION	
JTFB	JOINT TASK FORCE BRAVO	
LE	LAW ENFORCEMENT SWORN	
PMEL	WEIGHTS AND BALANCES	
QA	TEST QA	
SWAT	SPECIAL WEAPONS AND TACTICS	
WOW	THIS IS A TEST	
		–
<u>S</u> elect [E	inter] Eind [F5]	e]

4. Double-click one of the attributes in the list or highlight it and click **Select** or press **[Enter]** to return to the employee record.



✓ If there is a long list of attributes, click **F5** to search for the desired attribute by the attributes *ID* or *Attribute Description*.

Find Attribute ID and Descr	×
Find:	
OK Cancel	

✓ Click Cancel to back out of the attribute addition process without making any changes.

Vehicle Assignment

				E	Employe	e Details - MC	GUIRE,	KATHR	YN LISELLE	[SRSO1	14PERS00	044]	- 🗆	×
File E	dit	View	Hel	р										
Change	User	Nam	e Cł	nange F	assword	📝 Change Role	🕜 Help	Exit						
G	ienera	I Info	rmatio	on	Pe	rsonal Informatio	on	Eme	ergency Cont	act	Ager	ncy IDs	Attribute	s
Ve	hicle	Assig	nmen	t	Emplo	yee Picture	Emp	oloyee Sig	nature	User /	Access	CIC	Histo	ry
Car No			Year	Make		Model		STag	ConfTag	g VIN	#			^
														*
Note	: Viev	Only	(Vehi	cles are	e assigned i	n the Vehicle Mo	dule)							

The *Vehicle Assignment* tab is used to view vehicles currently assigned to the employee. The listing is strictly read-only. Vehicles are assigned in the *Fleet Management* module.

Employee Picture

	Employee Details - MCG	UIRE, KATHRYN LISELL	E [SRSO14PERS00	044]	- 🗆 🗙
File Edit View Help					
	e	Ê 🛛	2		
Copy to Clipboard Load from	I Disk Save to Disk Paste From	m Clipboard Remove Pictu	re Change User Nam	e	
Change Password Change	الاطنىية Je Role Capture from Video	o Help Exit			
General Information	Personal Information	Emergency Cor	itact Ager	icy IDs	Attributes
Vehicle Assignment	Employee Picture	Employee Signature	User Access	CIC	History

The *Employee Picture* tab is used to attach a photograph of the employee to the employee record. When the tab is selected, additional options are added to the top toolbar.

This photograph is included on the employee's ID badge.

- 1. Click on the **Employee Picture** tab. to add a photograph of an employee to their record.
- 2. Choose an option from the top toolbar to obtain the picture.
 - a. **Load from Disk**: Load a JPG picture file from the local computer, a USB drive, or a network location.
 - 1) Navigate to the desired picture.
 - 2) Double-click on the picture or highlight it and click **Open** to return to the employee record.
 - b. **Paste from Clipboard**: When the picture of the person has been copied to the local clipboard from another document or photo viewer, it can be pasted into the employee record.
 - c. **Capture from Video**: Use an attached web camera to capture a live picture of the employee.

- 1) Adjust the camera to align the person's facial features with the guidelines for ears, eyes, and nose.
- 2) When the picture is aligned as needed, press **[F]** or click on **Freeze Video Image**.
- 3) Press **[S]** or click on **Save Video Image** to save the image and return to the employee record.



- ✓ If the picture needs to be re-captured, press [L] or click on Live Video Image to restart the live video.
- ✓ The camera resolution and image size are shown in the status bar at the bottom of the capture window.
- ✓ Press **[C]** or click on **Cancel** to cancel the video capture.
- ✓ Use the *Config* menu to adjust the Video Configuration, Video Format, Video Display, Rotate Right, Rotate Left and Display Video Card Information.



- ✓ To save an employee's picture to the local computer, a USB drive, or a network location, click on Save to Disk. Navigate to the desired location and click on Save.
- ✓ To copy the picture from the employee record to another document, click Copy to Clipboard. The picture is, then, available for pasting in the desired location.
- ✓ Click **Remove Picture** to delete the picture from the employee record.

Employee Signature

E	mployee Details - MCG	UIRE, KATHRYN LISELL	E [SRSO1	4PERS000	044]	- 🗆 🗙
File Edit View Help						
Copy to Clipboard Load from	Disk Save to Disk Paste Fro	Clipboard Remove Pictu	ire			
General Information	Personal Information	Emergency Cor	ntact	Agen	cv IDs	Attributes
Vehicle Assignment	Employee Picture	Employee Signature	User A	Access	CIC	History

The *Employee Signature* tab is used to store a copy of the employee's signature for use on IDs and reports.

- 1. Select the **Employee Signature** tab.
- 2. Choose a method for loading the signature to the employee record.
 - a. **Load from Disk**: Load a JPG picture file of the signature from the local computer, a USB drive, or a network location.
 - 1) Navigate to the desired picture.
 - 2) Double-click on the picture or highlight it and click **Open** to return to the employee record.
 - b. **Paste from Clipboard**: When the employee's signature has been copied to the local clipboard from another document or photo viewer, it can be pasted into the employee record.



✓ To save an employee's signature to the local computer, a USB drive, or a network location, click on Save to Disk. Navigate to the desired location and click on Save.

- ✓ To copy the signature from the employee record to another document, click Copy to Clipboard. The signature is, then, available for pasting in the desired location.
- ✓ Click **Remove Picture** to delete the signature from the employee record.

User Access

	Employe	e Deta	ils - MC	GUIRE,	KATH	RYN LISELL	E [SRSO	14PERS00	044]	-	×
File Edit View Help											
Edit User Settings Edit U	ser Access Leve	els Cł	📝 nange Use	er Name	Cha	nge Password	ı c	2 hange Role	🥝 Help	Exit	
General Information	Pe	ersonal l	nformatio	on	Er	mergency Cor	ntact	Age	ncy IDs	Attril	outes
Vehicle Assignment	Emplo	oyee Pic	ture	Em	ployee S	ignature	User	Access	CIC	- F	listory
User Settings Password expires in Prompt password char Role: *DET DEPUTY	90 🔹 days nge at next log	InUs	low user t e Windov	o chang vs Authe	e passwo ntication	ord Login Na Windows Lo	ame KMCG ogin (Not a	UIRE ssigned)	Chang	je Windows L	.ogin Nam
ADMIN CAD CHAT	CIC JAI	IL N	ICT RE	PORTS	RMS	RMS_CIVIL	RMS_MBI	RMS_MI	RMS_MNI	SMARTWEE	3
Issue Property						-	_		_		^
Archive		~									
Delete		~									
lssue	XX	~	No Acce	ss to Issu	e Prop R	crd					
Pick Other Agencies Emp	oloyees	~									
Run	XX	~	No Acce	ss							
Personnel (Employee Ma	ster File)										
Archive/UnArchive		~									
Delete History		~									
Add/Edit History		~									
Run	RA	~	Access to	o Vlew M	lain Direc	tory Screen					
Update Call Numbers to	Active	~									
Reporting											
Run	XX	~	No Acce	SS							~

The *User Access* tab is used to designate the applications to which the employee is to have access. This tab is not available unless a username and password have been assigned. Refer to <u>Managing User Access</u> for more information.

CIC

ej E	mployee Details - MCGUIRE,	KATHRYN LISELLE	[SRSO14PERS	600044]	- 🗆 🗙
File Edit View Help	22		2 (2)	in the second se	
Edit Information Assign Active	Call # Change User Name Change	ge Password Chan	ge Role Help	Exit	
General Information	Personal Information	Emergency Cont	act A	gency IDs	Attributes
Vehicle Assignment	Employee Picture Emp	ployee Signature	User Access	CIC	History
CIC Login CIC Password CIC Certification Expirati CIC Certification Days before Show CIC Expiration N	on Date Expiration Vlessage				

The *CIC* tab is used to store individual credentials and certification information for running CIC queries.

- 1. Enter the employee's **CIC Login**.
- 2. Enter the employee's **CIC Password**.
- 3. Enter the **CIC Certification Expiration Date** in the format of MM/DD/YYYY, or by clicking the down arrow to select it from the drop-down calendar.
- 4. Enter the **Notification Days before Expiration**. Provided **Show CC Expiration Message** has been checked, the employee will be notified the designated number of days prior to the expiration of the CIC certification.

History

8	Employee Details - MC	GUIRE, KATH	IRYN LISELL	E [SRSO	14PERS000)44]		×
File Edit View Help				2	ை பி			
Edit Information Assign Activ	e Call # Change User Name	Change Pass	word Char	nge Role	Help Exit	:		
General Information	Personal Information	n E	mergency Con	ntact	Agen	cy IDs	Attributes	
Vehicle Assignment	Employee Picture	Employee	Signature	User	Access	CIC	Histor	У
Date Transac	tion Type	Old Value			New	Value		^
11/7/2014 1:43:13 PM Call No	Changed				K10) 		
11/6/2014 10:30:05 AN Division	Changed				A-SF 11/0	HEI 1/2014		
11/6/2014 10:30:04 AN Dispatcl	h Changed				ADN	л. Л		
11/6/2014 10:30:04 AN Primary	Unit Assignment Changed				SHF/	CHF/MAJ/O	PS/PATROL	
11/6/2014 10:30:04 Alv Rank Ch	nanged				GRA	ND MASTER		
11/6/2014 10:25:56 AIV Agency	Changed				SRSC	014PERS0004	14	
<								>
<u>T</u> ransaction Type			<u>F</u> ield Name					
Call No Changed		~	CALLNO					
<u>O</u> ld Value			New Value					
			K100					
Add Zedit	Elete							

The *History* tab tracks informational changes made to the employee record, provided tracking has been enabled in *Master Configuration*. Generally, events on this tab are automatically generated as changes occur. However, events can be changed or created, if the accessing user has permission to do so.

- 1. Click on the **History** tab.
- 2. Click **Edit Information** in the toolbar at the top. This allows two actions to occur.
 - a. The user can scroll through the list of changes to view older transactions not currently seen.
 - b. If permissions allow, the buttons at the bottom may be used to work with the transactions.
 - 1) Add: Create a new transaction for list of events.
 - a) Choose a **Transaction Type** from the drop-down menu.
 - b) Enter the **New Value**.

- c) If the **Field Name** where the change occurred is known, enter it in the field provided.
- d) If the value entered in *New Value* was a modification of existing information, enter the old information in **Old Value**.
- 2) Edit: Modify the selected transaction.
- 3) **Delete**: Remove the selected transaction from the employee record.



- \checkmark Generally this tab will only be accessed for troubleshooting.
- \checkmark It is not advised that changes should be made to transaction logs.

Assigning Roles

Roles are used to easily assign application permissions to a user by associating the employee record with a pre-configured set of permissions in a role record. Roles are configured in a separate portion of *Employee Master*. Refer to <u>Managing Roles</u> for more information.

1. Click Change Role in the top toolbar.

File E	dit V	/iew	Help						
	2		2	2	2		0	4	
Edit Use	er Sett	ings	Edit User Access Levels	Change User Name	Change Password	Change Role	Help	Exit	

2. Choose the role to which the user should be assigned from the *User Access Roles* window.

8	User Access Roles	×
	Role Name	^
Þ	<no assigned="" role=""></no>	
	*ADMINISTRATOR	
	*CIVIL CLERK	
		~
	₩ Assign Role Cancel	

3. Click **Assign Role**. The permissions are applied in the *User Access* tab of the employee record.



- ✓ The roles available to be assigned by the user accessing the employee record are only those to which that user has access to assign. Refer to <u>Setting Role</u> <u>Assignment Permissions</u> for more information.
- ✓ If the user accessing the employee record does not have permission to assign any roles. Only "<No Assigned Role>" is shown and the *Assign Role* button is disabled.

Changing User Names

Sometimes, it may become necessary to change an employee's username. This is usually in the event the person's name has changed for any reason.

1. Click Change User Name in the top toolbar.

Fil	e Ed	dit 💧	View	Help						
		2		🖉	Character News	Character Deserved	Charges Bala	0		
	dit Us	ser Se	ettings	Edit User Access Levels	Change User Name	Change Password	Change Kole	нер	Exit	

2. Enter the new user name in the Update User Access Profile dialog.

Update User Access Profile	x
Enter new user name for user: KMCGU	IRE
OK Cancel	

3. Click **OK**. Assuming the desired user name is not in use, it will be changed immediately.



- \checkmark The process outlined above does not change the user's password or permissions.
- ✓ The user name and permissions may be cleared by clicking Cancel on the Update User Access Profile dialog. A confirmation message verifies the action prior to performing it.



Click **Yes** to clear the login and all user access rights. Click **No** to return to the employee record without making any changes.

✓ If there is an associated *Mobile Forms* profile, that will need to be updated, as well.

Resetting Passwords

In the event that a user is unable to log into CTS applications due to an invalid password, administrators with permission to do so can reset the user's password.

1. Click Change Password in the top toolbar.



2. Enter the new password in the Change Password dialog.

Change Password
Enter new password for user KMCGUIRE
OK Cancel



- \checkmark The text of the password will be visible during entry.
- \checkmark The password is case sensitive.
- 3. Click **OK**. A dialog confirms the successful change of the password.

User Settings

```
User Settings

Password expires in 90 days Allow user to change password Login Name SMAHAFFEY

Prompt password change at next login

Role:
```

On the *User Access* tab, the *User Settings* section is available to set password expiration and reset options.

- 1. Click on the User Access tab.
- 2. Click Edit User Settings in the top toolbar.

Modify settings, as needed.

• **Password Expires in x Days**: Set the password to expire automatically after a set number of days.

- Allow user to change Password: Provide the user with the ability to change their own password either voluntarily or at expiration. If this is not checked, an administrator must reset the password whenever such is needed.
- **Prompt password change at next login**: Force the user to reset the password upon the next login.

Assigning Call Numbers

Call numbers are used throughout various CTS America modules to identify personnel involved in law enforcement activities. For example, the call number is used by dispatch to assign units to a CAD incident. It is also used to further identify the reporting officer on offense and arrest reports.

Initial call number assignment can occur from the main *Employee Master* window or within the employee record.

- 1. Select the employee record to which to assign a call number.
- 2. Click Assign Active Call Number in the toolbar at the top.
- 3. Enter the call number.
- 4. Click **OK**.



- \checkmark Call numbers must be unique. No two employees can have the same number.
- ✓ In a multi-agency setup, call numbers must be unique within each agency. For example, Agency A and Agency B may each have call number 100 assigned to different officers. Agency A, however, may only have call number 100 currently assigned to one officer.

Updating Call Numbers

Periodically, an agency may update call numbers to maintain a sequential numbering system. The *Future Call Number* field may be used to designate new call numbers prior to their actual assignment. The method for assigning the call numbers is dependent upon agency policy.

Once all new call numbers have been designated, *Employee Master* can be manually instructed from the *Edit* menu to update all active call numbers with the future call number, or individual records may be updated by right-clicking on the record and selecting **Assign Future Call Number**.

1. Search for, and select, the employee record for which the future call number is needed.

- 2. Click on the **Edit** menu and click on **Assign Future Call Number** to enter the employee's future call number.
- 3. Enter the call number and click **OK**.
- 4. Repeat the prior steps for all employee records requiring a future call number.
- 5. When all future call numbers have been entered, click on the **Edit** menu and click on **Move Future Call Numbers to Active Call Numbers**.
- 6. Click **Yes** to both confirmation messages to continue.

Wai	ning ×
Move the Future Call No Numbers???	umbers to the Active Call
	Yes No
Wa	ning ×
Move the Future Call No Numbers??? ARE YOU S	umbers to the Active Call URE!?!?
	Yes No
Select A	Agencies – 🗆 🗙
Select which Agencies to activate future Select agencies in the left listbox and them to the selected list to the right. Agency List: ACSO AGO AGO AGO AGO AGO AGO AGO CES CES CCS CCS CCS DCF DEP DJJ DOI	Agencies X e call numbers for. use the buttons provided to add Selected Agency List:

- 7. Choose the agency (or agencies) for which numbers should be updated.
- 8. Click Done.



9. Click OK.



- ✓ To use this option, the user must have Full Access (FA) to Update Call Numbers to Active.
- ✓ On the *Edit* menu, click **Undo Last Move of Future Call Numbers to Active Call Numbers** if a future call number should not have been moved to active status. This will reverse the last call number update.
- ✓ On the *Edit* menu, click **Remove Call Number** to clear an active call number from an employee record.
- ✓ On the *Edit* menu, click **Remove Future Call Numbers** and click **Yes**, when prompted, to remove configured future call numbers from *Employee Master* records.
- ✓ If there are any employees without a future call number assigned, *Employee Master* will ask if the call number should be overwritten with a blank record.



- Yes: Overwrite the currently displayed call number with a blank record.
- No: Retain the displayed call number.
- o Cancel: Cancel the update request.
- **No to All**: Retain the currently displayed call number and all other call numbers for which a future call number has not been designated.
- Yes to All: Overwrite the currently displayed call number and all other call numbers without a future call number with a blank record.

Archiving Employee Records

Employees no longer with the agency cannot be deleted as the personnel records are linked to reports. However, these inactive records can be archived. Archiving saves the record but allows users to view only active records on the main *Employee Master* list.

- 1. Search for, and select, the employee record to be archived.
- 2. Click on the **Edit** menu and click on **Archive Current Employee**. The desired record may also be right-clicked. In the context menu, select **Archive Current Employee**. The request can also be started by pressing [Alt+A].
- 3. Click **Yes** to confirm that the selected employee record should be archived.



- ✓ To restore an archived employee record, select the record, click on the Edit menu and click on Unarchive Current Employee. Click Yes to restore the record. This can also be accomplished by right-clicking on the archived record and selecting Unarchive Current Employee or pressing [Ctrl+U].
- ✓ When an employee record is restored, it is restored without user name, permissions, or call number. These will need to be reconfigured.

Viewing Archived Records

By default, archived employee records are not displayed on the main *Employee Master* window. However, this information can be shown to allow review of historical personnel information. To view archived employee records, click on the **Options** menu and click on **Hide Archived Employee Records** to remove the check mark from this option. When finished reviewing archived records, select this option again to hide the archived records.



- \checkmark Archived employee records are listed in italic text.
- ✓ For information on archiving an employee record, refer to <u>Archiving Employee</u> <u>Records</u>.

Printing Employee Reports and IDs

Employee Master allows agencies to set up a printer to produce ID cards and employee records. Agency-specific ID cards for each employee rank are set up in *Master Configuration* and printed for employees in *Employee Master*.

Printing ID Cards

After agency-specific ID cards for employee ranks are set up in *Master Configuration*, *Employee Master* can retrieve this information for printing the ID cards for specified employees. The ID cards or badges contain information such as the employee's name, ID, rank, agency name, the agency logo, picture, signature, and an expiration date.

- 1. Search for the employee record for which an ID needs to be printed. Highlight the needed record, if the search does not do so.
- 2. Click on the **File** menu, highlight **Print**, and then click **ID Card**. The ID card window opens, listing ID card descriptions and layouts.
- 3. Select the desired layout and click Use Selected Record.
- 4. Review the ID card using the *Print Preview* window.
- 5. Click the print icon at the top left to print the ID card.
- 6. Click **Close** when printing is complete.

Printing an Employee Record Report

The employee record report includes necessary details about the employee.

- Name, Race, Sex, Date of Birth, and Social Security Number (SSN)
- Assigned agency, rank and call number
- Assignment Area
- Employee ID number
- Office, Cell, and Pager Numbers
- Primary Unit Assignment and Position
- Home Address and Phone Number
- Emergency Contact Information

This information is confidential and should be destroyed when the hard copy is no longer needed.

1. Search for and select the desired employee record.

- 2. Click on the File menu, highlight **Print**, and then click on **Employee Record**.
- 3. Review the report using the *Print Preview* window.
- 4. Click the **Print** icon at the top left to print the report.
- 5. Click **Close** when printing is complete.

Printing an Employee Phone Directory

A phone directory for all active personnel may be printed from the main *Employee Master* window.

- 1. Click on the **File** menu, highlight **Print**, and then click on **Employee Phone Directory**. An agency selection screen appears.
- 2. Select the agency or agencies for which to print a directory.
 - To select multiple consecutive agencies, click on the first desired agency, hold down [Shift], and click on the last desired agency.
 - To select multiple non-consecutive agencies, click on the first desired agency, hold down [Ctrl], and click on all other desired agencies individually.
 - These two methods cannot be utilized at the same time.
- 3. Click **OK** when all desired agencies have been selected.
- 4. Review the directory using the *Print Preview* window.
- 5. Click the **Print** icon at the top left to print the personnel phone directory.
- 6. Click **Close** when printing is complete.

Managing Roles

a		SmartCOP EMPLOYEE/UNIT MASTER FILE -	□ ×
File Edit View Opt	ions Paging Help		
View Role Record Add	Prev Role Copy Role	New Role From Unassigned Use Display Users Display Users <thdisplay th="" users<=""> Display Users</thdisplay>	j xit
Roles		Users linked to Selected Role Users with no Assigned Role	
Role Number	Role Name	Name Name	^
SRSO14ROLS00004	*ADMINISTRATO	ADAMS, APRIL •, COMFD	
SRSO02ROL000023	*ARAMARK	CHARIZMA, SHANTRELLA ABERNATHY, THOMAS JOHN SR	
SRSO03ROL000203	*ARAMARK PROF	GOLDEN, CHRIS ALLEN, BENJAMIN MICHAEL	
SRSO02ROL000002	*BOOKING CLERK	ALLEN, TRENIKA KAKEYA	
SRSO03ROL000202	*BOOKING SUP	ALLTOP, COLETTE	
SRSO08ROL000012	*CIVIL CLERK	ALSTON, ALFRED	
SRSO06ROL000007	*CIVIL SERVER	AMBULANCE, UNIT 1	
SRSO07ROL000006	*CLASSIFICATION	APEL, MARJORIE DIANE	
SRSO14ROLS00003	*CLOWN	ARKIN, PAUL DANIEL	
SRSO14ROLS00001	*COLETTE	ARNOLD, MARCIA ELAINE	
SRSO02ROL000009	*COMMISSARY	ASCROFT, MICHAEL WILLIAM	
SRSO02ROL000020	*CORR ADMIN	AVRITT, JARAD R	_
SRSO02ROL000004	*CRO	BAGGETT, JANICE C	_
SRSO02ROL000014	*CRO/VISIT	BAKER, VICKIE LYNNE	
SRSO07ROL000005	*CSI TECH	BALDWIN, DOUGLAS DEWAYNE	
SRSO08ROL000003	*DET CPL	BARLOW, STEPHANIE EVERS	_
SRSO06ROL000002	*DET DEPUTY	BARNEY, PURPLE T SR	
SRSO02ROL000018	*DISPATCH CALL	BATTLES, MELINDA GAIL	
SRSO02ROL000017	*DISPATCH MAN	BEAUCHAMP, KRISTIN	
SRSO08ROL000013	*DISPATCH SHIFT	BELL, JAMES	
SRSO07ROL000002	*DIST PST11	BELL, NANCY JEAN	
SRSO06ROL000003	*DISTRICT PST	BELL, RAMONA	
SRSO02ROL000015	*FISCAL	V BELL, ZAC	~
Login Name: SMAHAFF	EY Access: AR	All Agencies) V	

Roles are used within *Employee Master* to assign the same permissions to multiple users. When the permissions on a role are updated, all users assigned to that role are automatically updated.

Accessing Roles

When *Employee Master* opens, the employee listing is shown by default. Employee roles may be accessed by clicking **Display Roles** in the toolbar.

File	Edit	View	Option	ns Paging	Help							
		9 2		22		123	E	5	<u>Q</u>	.↓₹		
Vi	ew Emp	loyee R	ecord	Add New Em	ployee	Assign Active Call Number	Page Group	Page Person	Find	Sort	Display Roles	Exit

After the display is changed to show configured roles, the button text changes to *Display Users* to allow switching back to view the employee listing.

File	Edit	View	Options Pagi	ng Help					
Vie	w Role F	Record	Add New Role	Copy Role	Elete Role	% Role Assignable By	New Role From Unassigned Use	Display Users	🚺 Exit

The main screen when the *Roles* display is accessed, is divided into three columns.

- **Roles**: All currently configured roles are listed.
- Users linked to Selected Role: All users assigned to the role selected in the *Roles* column are listed.
- Users with no Assigned Role: All users to whom a role has not been assigned are listed.

Double-click on a role to view it, or highlight it and click **View Role Record** in the top toolbar.

8	Role D	etails - *ADN	IINISTRA	TOR [SRSO	14ROLS0	0004]		- 🗆	×
File View Help									
☑ ☑ Edit User Access Levels Help Exit									
User Access									
ADMIN CAD CHAT CIC	JAIL N	ACT REPORT	S RMS	RMS_CIVIL	RMS_MBI	RMS_MI	RMS_MNI	SMARTWEB	
Issue Property			-						~
Archive	FA 🗸	Full Access to	Archive Pro	p Rcrd					
Delete	FA v	Full Access to	Delete Pro	o Rcrd					
lssue	FA ∨	Full Access to	ssue Prop	Rcrd					
Pick Other Agencies Employees	~								
Run	FA 🗸	Full Access to Modify Issued Prop Rcrd							
Personnel (Employee Master File)	4								
Archive/UnArchive	FA v	Full Access Are	hive/UnAr	chive Employ	ees				
Delete History	FA 🗸	Full Access to	Delete Hist	ory					
Add/Edit History	FA v	Full Access to Add/Edit History							
Run	AR v	Full Access to	elected Ag	encies		[Selected Ag	jencies	
Update Call Numbers to Active	FA ∨	Full Access to	Jpdate Cal	Numbers					
Reporting									_
Run	FA 🗸	Full Access to	Print Repor	ts					
Training									_
Delete Attachments	FA 🗸	Full Access to	Delete Atta	chments					
Run	FA v	Full Access to	Modify Tra	ining Records					
	1	1							~

Only *User Access* settings are available for roles. For more information, refer to <u>Managing</u> <u>User Access</u>.

Adding Roles

There are three methods for adding a new role to *Employee Master*, each represented by a button in the top toolbar.

- Add New Role: Create a new role with no permissions. All permissions will need to be designated prior to using the role.
- **Copy Role**: Create a new role based upon the currently selected role. The permissions can, then, be modified to fit the needs of the agency for the new role.
- New Role From Unassigned User: Create a new role from a user profile which contains the needed permissions, but is not currently assigned to a role.

Setting Role Assignment Permissions

When assigning a role from within an employee record, only those designated to assign a role is able to assign it.

- 1. Select a role within the *Roles* column.
- 2. Click on **Role Assignable By...** in the top toolbar.

Selected Role A	ssignable By	×
Name	Employee ID	^
ADAMS, APRIL	CT2	
ALDRIDGE, DEBORAH LASHAWN	804	
ALLEN, TRENIKA KAKEYA	841	
ALLTOP, COLETTE		
AVRITT, JARAD R		
BEASLEY, MICHAEL WAYNE	CTS03	
BEAUCHAMP, KRISTIN		
BELL, ZAC		
BLACKARD, BRIAN ALLEN	CTS01	
BOND, JAMES		
BROWN, ROSCOE LEE JR	75489	
CHARIZMA, SHANTRELLA	258	_
CHONG, TOMMY S SR	Hee Haw	_
DALE, KAREN D	D15	_
DALE, KAREN D MS	E06	_
DAVIS, BRIAN O	00	_
DILL, JOHN		_
DOE, JOE		
DUPLICATE TEST, JOHN M		
FERGUSON, DESZI		_
FLINTSTONE, FRED SANFORD SR	7384	
FLOYD, VICKI KAY	335	_
FRAGA, JUAN	CTS04	
GODFREY, ADAM C	8500	_
GOLDEN, CHRIS	222	_
grace, Karen	020	~
	🔒 Save 🔀 Canc	el

All users with permission to modify employee records are listed.

- 3. Place a check beside all users who should be able to assign the role to users.
- 4. Click Save.

Assigning Users to Roles

When viewing the role listing, users can be assigned to roles through a simple "drag-and-drop" action.

- 1. Highlight the desired role in the Roles column.
- 2. Highlight the desired user in the Users with no Assigned Role column.
- 3. Left-click on the user, hold down the mouse button, and drag it to the middle column (*Users linked to Selected Role*)

OR

Right-click the user, and select Assign Role [Selected Role].

4. Release the left mouse button. The user's permissions are modified to match the new role assignment. This may take a few seconds to process.

Removing Users from Roles

Note: This action should only be taken if the user will be assigned to a new role in the near future.

- 1. Find and highlight the desired role in the Roles column.
- 2. Find and highlight the desired user under Users linked to Selected Role.
- 3. Right-click on the user and select **Remove Role Assignment**.

Deleting Roles

In the event that a role is no longer needed, it can be deleted. This will not delete any users assigned to that role.

Note: This is not an advised action. The deletion cannot be reversed. If a deleted role is needed, it must be rebuilt.

- 1. Find the desired role in the *Roles* column.
- 2. Press [Delete] or click Delete Role in the top toolbar.
Managing User Access

The *User Access* tab, whether within an employee record or a role, contains the permissions that control what applications each user can access and the level of access to those applications. System administrators use the *User Access* tab to set or change employee permissions and user access levels for each module of the CTS America software suite. User access levels are grouped by module.

- **ADMIN**: This controls access to the administrative suite, including *Employee Master*, *Master Configuration*, *Training*, and *Fleet Management*.
- **CAD**: This controls access to the *SmartCAD* suite, including *SmartCAD* and *CAD Configuration*.
- **CHAT**: This controls access to *SmartChat*. The application is customarily used in conjunction with *SmartCAD* to communicate with officers in the field in real time.
- CIC: This controls individual users' ability to run CIC queries in *SmartCAD* or *SmartMCT*.
- JAIL: This controls access to the *SmartJail* Suite, including *JailBook*, *JailMedical*, *JailVisit*, *JailBook* Admin Reports, *Jail Configuration*, *JailIncident*, *JailLog*, *JailVisit*, and *Inmate Programs*.
- MCT: This controls access to *SmartMCT* and its various functions.
- **REPORTS**: This controls access to *SmartReports* and the individual groups of reports found therein.
- **RMS**: This controls access to the majority or the *SmartRMS* suite, including *Arrest*, *Case Management/Offense*, *Charge Configuration*, *Evidence*, *Pawn*, and *Permit*.
- **RMS_CIVIL**: This tab focuses on access to *Civil* and its various civil processes.
- **RMS_MBI**: This tab focuses on access to the *Master Business Index* (MBI) and the *Businesses* tab within *Master Index* as well as some portions of MBI records.
- **RMS_MI**: This tab focuses on access to the *Master Vehicle Index* (MVI) and the *Master Vessel Index* (MHI) within *Master Index* as well as some portions of MVI and MHI records.
- **RMS_MNI**: This tab focuses on access to the *Master Name Index* (MNI) and the *Names* tab within *Master Index* as well as some portions of MNI records.
- **SMARTWEB**: This controls access to the administrative functions of *SmartWeb* and *SmartIR*.

- 1. Click on the **User Access** tab.
- 2. Click Edit User Access Levels in the top toolbar.

If the permissions for a user assigned to a role are being modified, a message will advise that changing any of the user's permissions will clear the assigned role for this user. To continue, click **Yes**. Otherwise click **No**.

If the permissions change will apply to all users assigned to the user's current role, make the change to the role, instead of the employee record. All users assigned to that role can will be updated at the same time.

- 3. Select the corresponding access tab and make selections from the drop-down lists to define the access levels for specific functions within each module.
- 4. For example, if the employee will use any of the SmartRMS modules, select the **RMS** tab. Within *RMS*, if the user is to have full access to add and modify arrest reports, select **FA** from the *Arrest* group's **Reports** drop-down menu. When an access level is selected, a description of the selected level appears to the right of the drop-down menu.
- 5. When finished assigning access levels, click **Exit**. Changes are automatically saved as they are made.

ADMIN

Issue Property

Archive

FA	Full access to archive property records
XX	No Access. Archive option is not available.

Delete

FA	Full access to delete property records
XX	No Access. Delete option is unavailable.

Issue

FA	Full access to issue property to employees
XX	No Access. Issue option is unavailable.

FA	Full access view and property records
LA	Read-only access to property records
XX	No Access. Issued Property application is inaccessible.

Personnel (Employee Master File)

Archive/UnArchive

FA	Full access to archive or un-archive employee records
XX	No Access. Archive and Unarchive options are unavailable.

Delete History

FA	Full access to delete history
XX	No Access. Delete option is unavailable on the History tab.

Add/Edit History

FA	Full access to add or edit history
XX	No Access. <i>Add</i> and <i>Edit</i> options are available on the <i>History</i> tab.

AR	Full access to selected agencies. When this access level is selected, click Selected Agencies to choose the viewable agencies.Note: Only authorized users can assign this access level.
CA	Access to view the address and emergency contact information for an employee in <i>Employee Master</i> . Note : This access level is intended for the communications department.
FA	Full access to view, add, edit, and delete any record with a picture in <i>Employee Master</i> . Records without pictures, including roles, are inaccessible.
LA	Access to view any record with a pictures in <i>Employee Master</i> . Records without pictures, including roles, are inaccessible.
RA	Access to view only the main <i>Employee Master</i> window and perform searches
RG	Access to view only the main <i>Employee Master</i> window and send group pages
SA	Access to view any record with a picture and a unit assignment in <i>Employee Master</i> . Records without a picture or a unit assignment are inaccessible.

XX

No Access. Employee Master application is inaccessible.

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✓ Users with full access to *Run* under *User Access* in the *ADMIN* tab have full access to edit the *User Access* tab, regardless of the access level assigned to *Run* under *Personnel (Employee Master File)*, assuming that level is not *XX*.

Update Call Numbers to Active

FA	Full access to update call numbers
XX	No Access. Options to update call numbers are not available.

Reporting

Run

FA	Full access to print reports
XX	No Access. Reports and ID Cards are unavailable.

Training

Delete Attachments

FA	Full access to delete attachments in the Training application
XX	No Access. Attachment deletion options are not available.

Run

FA	Full access to view, add, edit, and delete any record in <i>Training</i> application
LA	Read-only access to record in the <i>Training</i> application.
XX	No Access. The <i>Training</i> application is inaccessible.

Updater

Access Updater Administrator

Y	Permission granted to access application
Ν	Access denied to application

Can Modify Updates

Y	Permission granted to add and modify updates
Ν	Access denied to add or modify application

Vehicles (Fleet Management)

Archive

FA	Full access to archive fleet vehicle records
XX	No Access. Record archive options are not available.

Confidential Vehicles

FA	Full access to view and modify confidential vehicles
LA	Read-only access to confidential vehicles
XX	No Access. Confidential vehicles cannot be viewed.

Delete

FA	Full access to delete fleet vehicle records
XX	No Access. Record deletion options are not available.

Issue

FA	Full access to issue fleet vehicles to employees
XX	No Access. Vehicle issue options are not available.

Run

FA	Full access to view and modify vehicle records
LA	Read-only access to vehicle records
XX	No Access. Fleet Management is not available.

Master System Configuration

Run

FA	Full access to Master Configuration
XX	No Access. Master Configuration is not accessible

Global Searches

FA	Full access to save search criteria
XX	No Access. Save Search option is not available

User Access

Assign Roles

FA	Full access to assign roles to employee records
XX	No Access. Roles cannot be assigned.

Add/Edit Roles

FA	Full access to add or edit roles
XX	No Access. Roles cannot be accessed.

Edit User Name

FA	Full access to modify user names
XX	No Access. Change User Name option is not available

Edit User Password Settings

FA	Full access to edit password settings
XX	No Access. Password settings cannot be changed.

Run

FA	Full access to view and modify user access
LA	Read-only access to user access settings
XX	No Access. User Access cannot be accessed.

CAD

SmartCAD Access

Access levels for most SmartCAD functions are Y (Yes; Full Access) or N (No; No Access) for the following functions:

- Secondary Activity Delete
- Secondary Activity Add/Edit
- Address Book Delete
- Address Book Add/Edit
- BOLO Delete
- BOLO Add/Edit
- Close Calls
- Delete Supplemental Records

- Create/Edit Calls
- History Delete
- History Add/Edit
- History View
- Logs Delete
- Logs Add/Edit
- Logs View
- CIC Returns
- Caution Notes Delete
- Caution Notes Add/Edit
- Geo Streets/Places Delete
- Geo Streets/Places Add/Edit
- Medical Instructions Delete
- Medical Instructions Add/Edit
- Search Notes
- Run
- Standard Operating Procedures Delete
- Standard Operating Procedures Add/Edit
- Towing Company Delete
- Towing Company Add/Edit

CADCfg Access

Delete Secondary Activity

Y	Permission granted delete secondary activities
Ν	Access denied to add or modify application

Run

FA	Full access to all functions in CAD Configuration
LA	Read-only access to lookup tables, such as BOLO records, address book entries, caution notes, and towing companies
SA	Access to view, add, edit, and delete traffic stop settings, workstation settings, complaint types, disposition codes, standard operating procedures, run cards, quick keys, BOLO records, address book entries, caution notes, and towing companies.
XX	No Access. CAD Configuration application is inaccessible.

SmartCAD Reports

Run

FA	Full access to print reports
XX	No Access. Report printing is not available.

CHAT

SmartChat Access

Run

Y	Permission granted SmartChat
Ν	Access denied to SmartChat

CIC

State CIC

FA	Full access to run CIC queries
XX	No Access. CIC queries cannot be performed

JAIL

All Applications

View Juvenile Information

FA	Full access to view juvenile information
XX	No Access. Juvenile information is hidden

Court Interface

Run

FA	Full access to the court interface
XX	No Access. Court interface is inaccessible

Inmate Programs

Access levels for Inmate Programs are Yes (full access) or No (no access) for the following functions:

- Master Admin: Provides access to all program types, regardless of individual permissions.
- Run: Provides access to Inmate Programs
- Admin [Program Type]: Permission is created dynamically when a new program type is created. Provides administrative access to the program type.
- Edit [Program Type]: Permission is created dynamically when a new program type is created. Provides access to make assignments within the program type.

Admin Reports

DDIS Export

FA	Full access to perform the DDIS (Detention Data Information System) export. (Montana only)
XX	No Access. DDIS export not available.

FA	Full access to run Jail Administration Reports
XX	No Access. Jail Administration Reports is not accessible

Booking

Add/Edit Cases

FA	Full access to add and edit cases
XX	No Access. Cases can be neither added nor modified

Add/Edit Charges

FA	Full access to add and edit charges
XX	No Access. Charges can be neither added nor modified

Add Keep From

FA	Full access to add keep from information
XX	No Access. Keep from information cannot be entered

Add Property

FA	Full access to add property
XX	No Access. Property information cannot be entered

Add/Edit Medical Screenings

FA	Full access to add and edit medical screenings
XX	No Access. Medical screenings can be neither added nor modified.

Add Special Requirements

FA	Full access to add special requirements
XX	No Access. Special requirements cannot be entered

Add Victim

FA	Full access to add victims
XX	No Access. Victim information cannot be entered

Add/Edit Assessment

FA	Full access to add and edit assessments
XX	No Access. Assessments can be neither added nor modified

Add Visitor to Victims or vice-versa

FA	Full access to add a visitor to the victims list or a victim to the visitors list
XX	No Access. Visitors cannot be added to the victims list; nor can victims be added to the visitor list.

Archive Inmates

FA	Full access to archive inmate records
XX	No Access. Record archive functions are disabled

Assign Cells

FA	Full access to make cell assignments
XX	No Access. Cell assignment options are disabled

Authorize Release

FA	Full access to authorize release of inmates
XX	No Access. Inmate release options are disabled

Book Inmate

FA	Full access to book inmates
XX	No Access. Inmate booking options are disabled

Cancel Cases

FA	Full access to cancel cases in inmate records
XX	No Access. Case cancellation options are disabled

Override Cell Custody Assignment

FA	Full access to override cell custody assignments
XX	No Access. Cell custody assignment override functions are disabled

Cell Maintenance Hold

FA	Full access to set cell maintenance hold
XX	No Access. Cell maintenance hold options are disabled

Change Inmate Jurisdiction

FA	Full access to assign or change inmate jurisdiction
XX	No Access. Inmate jurisdiction can be neither assigned nor modified

Check In Inmate

FA	Full access to check in inmates singly or in groups
XX	No Access. Inmate check-in options are disabled

Check Out Inmate

FA	Full access to check out inmates singly or in groups
XX	No Access. Inmate check-out options are disabled

Close Cases

FA	Full access to close cases in inmate records
XX	No Access. Case closure options are disabled

Complete Watch

FA	Full access to complete watches
XX	No Access. Watch completion options are disabled

Delete Assessment

FA	Full access to deleted assessments
XX	No Access. Assessment deletion options are disabled

Delete Attachments

FA	Full access to delete attachments
XX	No Access. Attachment deletion options are disabled

Delete Check In/Out

FA	Full access to delete check in/out records
XX	No Access. Deletion of check in/out records is disabled

Delete Medical Screenings

FA	Full access to delete medical screenings
XX	No Access. Medical screening deletion options are disabled

Delete Special Requirements

FA	Full access to delete special requirements from inmate records
XX	No Access. Special requirement deletion options are disabled

Delete Cases

FA	Full access to delete cases from inmate records
XX	No Access. Case deletion options are disabled

Delete Charges

FA	Full access to delete charges from inmate records
XX	No Access. Charge deletion options are disabled

Delete Keep From

FA	Full access to delete Keep From information from inmate records
XX	No Access. Keep From deletion options are disabled

Delete Property

FA	Full access to delete property from inmate records
XX	No Access. Property deletion options are disabled

Delete Victim

FA	Full access to delete victims from inmate records
XX	No Access. Victim deletion options are disabled

Edit Keep From

FA	Full access to edit Keep From information
XX	No Access. Keep From information cannot be modified

Edit Released Inmate Record

FA	Full access to edit released inmate records
XX	No Access. Released inmate records cannot be modified

Edit Special Requirements

FA	Full access to edit special requirements on inmate records
XX	No Access. Special requirements cannot be modified

Edit Jurisdiction History

FA	Full access to edit the jurisdiction history
XX	No Access. Jurisdiction history cannot be modified

Edit Work Log Records

FA	Full access to edit work log records
XX	No Access. Work log records cannot be modified

Enable Keep From

FA	Full access to enable the Keep From list within inmate records
XX	No Access. Enable Keep From is disabled

Expunge Inmate

FA	Full access to expunge inmate records
XX	No Access. Expunge options are disabled

Finger Print

FA	Full access to add and edit fingerprints within inmate records
XX	No Access. Fingerprints can be neither added nor modified

Head Count Discrepancy

FA	Full access to perform a head count discrepancy check
XX	No Access. Head count discrepancy check not available

Import Arrest Charges

FA	Full access to import charges from Arrest
XX	No Access. Charge import options not available

Inmate Hold

FA	Full access to place a hold on an inmate (preventing release)
XX	No Access. Hold Inmate option not available

Delete Events

FA	Full access to delete events
XX	No Access. Event deletion is not available

Add/Edit Attachments

FA	Full access to add and edit attachments
XX	No Access. Attachments can be neither added nor modified

Change Booking Date/Time

FA	Full access to change the booking date and time
XX	No Access. Booking date and time cannot be modified

Open Cases

FA	Full access to open cases within inmate records
XX	No Access. Cases cannot be opened

Prepare Discrepancy Check

FA	Full access to prepare a discrepancy check
XX	No Access. Discrepancy check is not available

Print Assessment

FA	Full access to print assessments
XX	No Access. Assessments cannot be printed

Make Record Public

FA	Full access to make inmate records public or private
XX	No Access. Public access settings cannot be modified

Release Property

FA	Full access to release property items on inmate records
XX	No Access. Property items cannot be released

Reserve Cell

FA	Full access to reserve cells
XX	No Access. Cell reservation functions are unavailable

Override Reserved Cell

FA	Full access to override cell reservations
XX	No Access. Cell reservation override is unavailable

Run

FA	Full access to create and edit records in JailBook
LA	Read-only access to records in JailBook
XX	No Access. JailBook cannot be accessed

Add/Edit Scheduled Visitations

FA	Full access to add and edit scheduled visitations
XX	No Access. Scheduled visitations can be neither created nor modified

Delete Scheduled Visitations

FA	Full access to delete scheduled visitations
XX	No Access. Scheduled visitations cannot be deleted

Seal/Unseal Inmate Record

FA	Full access to seal or unseal inmate records
XX	No Access. Inmate records can be neither sealed nor unsealed

Suicide Test

FA	Full access to create and fill out a suicide test
XX	No Access. Suicide tests are not available

Suspend Watch

FA	Full access to suspend watches
XX	No Access. Watch suspension functions are unavailable

Transfer Inmate to Another Facility

FA	Full access to transfer an inmate to another facility
XX	No Access. Inmate transfer functions are unavailable

Un-Archive Inmates

FA	Full access to un-archive inmate records
XX	No Access. Un-archiving records is not unavailable

Unreserve Cell

FA	Full access to un-reserve cells
XX	No Access. Cell un-reservation functions are unavailable

View Assessment Interview

FA	Full access to view assessment interviews
XX	No Access. Assessment interviews cannot be viewed

View Property

FA	Full access to view property records
XX	No Access. Property records cannot be viewed

View Medical Screenings

FA	Full access to view medical screenings
XX	No Access. Medical screenings cannot be viewed

View/Print Sealed Record

FA	Full access to view and print sealed inmate records
XX	No Access. Sealed inmate records can be neither viewed nor printed

View Victim

FA	Full access to view victim information on inmate records
XX	No Access. Victim information cannot be viewed

Configuration & Setup

Run

FA	Full access to Jail Configuration
XX	No Access. Jail Configuration cannot be accessed

Classification

Add/Edit Custody Assessment Records

FA	Full access to add or edit custody assessment records
XX	No Access. Custody assessment records can be neither created nor modified

Approve/Disapprove Override

FA	Full access to approve or disapprove classification overrides
XX	No Access. Override approval is not available

Delete Custody Assessment Records

FA	Full access to delete custody assessment records
XX	No Access. Custody assessment record deletion is not available

Override Recommended Custody Level

FA	Full access to override the recommended custody level
XX	No Access. The recommended custody level cannot be overridden

Run

FA	Full access to add edit and delete classification details
LA	Read-only access to inmate details
XX	No Access. Classification information is unavailable

View Custody Assessment Records

FA	Full access to view custody assessment records
XX	No Access. Custody assessment records cannot be viewed

Infirmary (Medical)

Add/Edit Released Inmate Medical Records

FA	Full access add or edit release inmate medical records
XX	No Access. Medical records associated with released inmates can be neither created nor modified

Add/Edit Follow-Up Appointments

FA	Full access to add or edit follow-up appointments
XX	No Access. Follow-up appointments can be neither created nor modified

Add/Edit Lab Services

FA	Full access to add or edit lab service requests
XX	No Access. Lab service requests can be neither created nor modified

Add/Edit Medical Services

FA	Full access to add or edit medical service records
XX	No Access. Medical service records can be neither created nor modified

Add/Edit Prescription Information

FA	Full access to add and edit prescription information
XX	No Access. Prescription information can be neither created nor modified

Print HIPPA Sensitive Information

FA	Full access to print HIPPA-sensitive information
XX	No Access. HIPPA-sensitive information cannot be printed

Run

FA	Full access to add and edit infirmary records in JailMedical
LA	Read-only access to infirmary records in JailMedical
XX	No Access. JailMedical cannot be accessed

Incident

Add Primary Inmate

FA	Full access to add a primary inmate to a jail incident report
XX	No Access. Primary inmate cannot be added to a jail incident report

Approve/Unapprove Report

FA	Full access to approve and unapproved jail incident reports
XX	No Access. Approval and unapproval options are not available

Delete Primary Inmate

FA	Full access to delete the primary inmate from a jail incident
	report
XX	No Access. Primary inmate cannot be deleted from a jail incident
	report

Employee Master

Delete Incident Report

FA	Full access to delete jail incident reports
XX	No Access. Jail incident reports cannot be deleted

Run

FA	Full access to add, edit, and delete records in JailIncident
LA	Read-only access to records in JailIncident
XX	No Access. JailIncident cannot be accessed

Jail Log

Access Supervisor Log

FA	Full access to add and edit records in the supervisor log
XX	No Access. Supervisor log cannot be accessed

Add Jail Log Records

FA	Full access to add and edit records in JailLog
XX	No Access. JailLog cannot be accessed

Edit Expired Jail Log Records

FA	Full access to edit expired jail log records
XX	No Access. Expired jail log records cannot be modified

Edit Jail Log Records

FA	Full access to edit any record in JailLog
LA	Only those log records created by the current user may be modified
XX	No Access. Log records cannot be modified

FA	Full access to add, edit and delete records in JailLog
LA	Read-only access to JailLog
XX	No Access. JailLog cannot be accessed

Search

Run

FA	Full access to perform searches in JailBook
XX	No Access. Search functions are not available

Transportation (Move)

Edit Move

FA	Full access to edit transport information in JailMove
XX	No Access. Transport information cannot be modified

Mark Canceled

FA	Full access to cancel a transport
XX	No Access. Transports cannot be cancelled

Mark Completed

FA	Full access to mark a move complete
XX	No Access. Transports cannot be marked complete

Run

FA	Full access to add, edit, and delete records in JailMove
LA	Read-only access to records in JailMove
XX	No Access. JailMove cannot be accessed

Visitation

Add Visitors

FA	Full access to add visitors in JailVisit
XX	No Access. Visitors cannot be added

Allow/Disallow/Ban Visitors

FA	Full access to allow, disallow, or ban visitors
XX	No Access. Visitor permission status cannot be modified

Check In Visitors

FA	Full access to check in visitors
XX	No Access. Visitors cannot be checked in

Check Out Visitors

FA	Full access to check out visitors
XX	No Access. Visitors cannot be checked out

Delete Visitors

FA	Full access to delete visitor records from JailVisit
XX	No Access. Visitor records cannot be deleted

Inmate Visitation Restrictions

FA	Full access to add, edit, or cancel inmate visitation restrictions
XX	No Access. Inmate visitation restriction cannot be modified

Run

FA	Full access to add, edit, and delete JailVisit records
LA	Read-only access to JailVisit records
XX	No Access. JailVisit cannot be accessed

Sentencing

Add Sentence

FA	Full access to add sentencing information to inmate records
XX	No Access. Sentence cannot be adjusted

Adjust Sentence

FA	Full access to adjust the sentence on an inmate record
XX	No Access. Sentencing information cannot be modified

Delete Sentence Adjustments

FA	Full access to delete sentence adjustments
XX	No Access. Sentence adjustment cannot be deleted

Delete Sentence

FA	Full access to delete sentencing information from inmate records
XX	No Access. Sentence deletion is not available

Edit Sentence

FA	Full access to edit sentencing information
XX	No Access. Sentencing information cannot be modified

Inmate Tracking

Run

FA	Full access to Inmate Tracking
XX	No Access. Inmate Tracking cannot be accessed

МСТ

All permissions on the *MCT* tab, except for the AVL Stealth Level, have the options of Y (Yes; Full Access) or N (No; No Access).

МСТ

- Allow SmartCHAT: Allow the user to access SmartCHAT within SmartMCT
- Smart Mobile Run: Allow the user to log into *SmartMCT*

AVL

- **AVL Stealth View Level**: Stealth levels may be assigned from zero (0) through ten (10). Other users with a lower stealth setting will not see the user when stealth mode is enabled. Users with a higher stealth setting will see the user even if stealth mode is enabled.
- Enter AVL Stealth Mode: Allow the user to enter stealth mode.

CAD

- Allow Smart Mobile CAD: Allow user to view and run *SmartCAD* from *SmartMCT*
- View All Active Incident Detail: Allow user to view incident details for all active incidents
- View Assigned Incident Detail: Allow user to view incident details for the assigned incident
- View EMS Incident: Allow user to view the EMS incident type
- View Fire Incident: Allow user to view the Fire incident type
- View Law Incident: Allow user to view the Law incident type
- View Non CAD Incident: Allow user to view the Non-CAD incident type
- View Smart CAD History: Allow user to query and view *SmartCAD* historical records

CAD Self Dispatch

- Allow Close Incident: Allow user to close the assigned incident
- **Change Unit Activity Status**: Allow user to set and modify primary and secondary activities
- Change Unit Duty Status: Allow user to change duty status
- Change Unit Response Status: Allow user to change response status
- Create Active Incident: Allow user to create CAD incidents
- Edit All Active Incident Detail: Allow user to edit details on all incidents, regardless of assignment
- Edit Assigned Incident Detail: Allow user to edit details on the assigned incident

CIC

• Allow CIC NCIC NLETS: Allow user to run CIC, NCIC, and NLETS queries.

EMPMAST

• Allow Employee Query: Allow user to search *Employee Master* for other *SmartMCT* users

MBI

• Allow MBI Query: Allow user to search the *Master Business Index*

MNI

• Allow MNI Query: Allow user to search the *Master Name Index*

RMS

• Allow RMS Query: Allow user to search *Offense*.

REPORTS

Each group of reports, as configured in SmartReports, must be assigned a user access level of FA (Full Access) or XX (No Access). As groups are created, new permissions are created dynamically in *Employee Master*.

Configuration Options

FA	Full access to SmartReports Configuration
XX	No Access. Configuration options cannot be accessed

Run

FA Full ac	ess to run SmartReports	
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XX No Access. *SmartReports* cannot be accessed

View/Edit Scheduled Reports

FA	Full access to add, edit, and delete scheduled reports in Report Scheduler
XX	No Access. <i>Report Scheduler</i> cannot be accessed.

RMS

All Applications

Data Sharing Access

AD	Administrative access only to data share functions
L1	Full access to data sharing
L2	Level 2 access to data sharing
L3	Level 3 access to data sharing
L4	Level 4 access to data sharing
L5	Level 5 access to data sharing
XX	No Access. Data sharing cannot be accessed

View Juvenile Information

FA	Full access to view juvenile information on reports
XX	No Access. Juvenile information is masked on reports

Arrest

Approve

FA	Full access to approve all report types in Arrest
XX	No Access. Report approval options are disabled

Delete Arrest Reports

FA	Full access to delete arrest reports
XX	No Access. Report deletions options are disabled

Reports

FA	Full access to add and edit all report types in Arrest
LA	Read-only access to all report types in Arrest.
XX	No Access. Arrest cannot be accessed

Attachments

FA	Full access to add and edit attachments
LA	Read-only access to attachments
XX	No Access. Attachments cannot be accessed

Delete Attachments

FA	Full access to delete attachments
LA	Deletion options are only available for attachments created by the current user
XX	No Access. Attachments cannot be deleted

Change Paper Types

FA	Full access to change paper types
XX	No Access. Paper type change options are disabled

CIC

FA	Full access to add and edit CIC entries on reports
LA	Read-only access to CIC entries on reports
XX	No Access. CIC entries cannot be accessed

Expunge/Seal

FA	Full access to expunge and seal reports
LA	Read-only access to expunged or sealed reports
XX	No Access. Expunge and seal options are disabled. Expunged or sealed reports cannot be accessed

Public Record

FA	Full access to make records public
XX	No Access. Public access settings cannot be modified

Service Notes

FA	Full access to unrestricted service notes
LA	Read-only access to unrestricted service notes
RA	Full access to restricted and unrestricted service notes
XX	No Access. Service notes cannot be accessed

Warrant/Paper Serve

FA	Full access to serve papers in Arrest
XX	No Access. Paper service options are unavailable

Warrant/Paper Un-Serve

FA	Full access to un-serve papers in Arrest
XX	No Access. Un-serve options are unavailable

Case File Access

Run

FA	Full access to non-confidential case files
LA	Read-only access to RMS case files
XX	No Access. Case files cannot be accessed

Case Management

Assignments

FA	Full access to add and edit assignments
LA	Read-only access to assignments
XX	No Access. Assignments cannot be accessed

Attachments

FA	Full access to add and edit attachments
LA	Read-only access to attachments
XX	No Access. Attachments cannot be accessed

Attachments Delete

FA	Full access to delete all attachments
LA	Deletion options are only available for attachments created by the current user
XX	No Access. Attachments cannot be deleted

CAD Call

LA	Access to view related CAD incident information
XX	No Access. CAD information is not available

Related Evidence

LA	Access to view related evidence
XX	No Access. Related evidence cannot be accessed

Run

FA	Full access to run Case Management
XX	No Access. Case Management cannot be accessed

Solvability

FA	Full access to edit solvability information
LA	Read-only access to solvability information
XX	No Access. Solvability information cannot be accessed

Investigation Time Add

FA	Full access to add investigation time information
XX	No Access. Investigation time information cannot be added

Investigation Time Delete

FA	Full access to delete investigation time information
XX	No Access. Investigation time information cannot be deleted

Investigation Time Edit

FA	Full access to edit investigation time information
XX	No Access. Investigation time information cannot be modified

Charge Config

Run

FA	Full access to run Charge Configuration
XX	No Access. Charge Configuration cannot be accessed

Crime Tips

Run

FA	Full access to add, edit, and delete crime tips
XX	No Access. Crime tips cannot be accessed

Evidence Records

Access Inventory

FA	Full access to inventory
LA	Read-only access to inventory
XX	No Access. Inventory cannot be accessed

Approve Inventory

FA	Full access to approve inventory
XX	No Access. Approval options are not available

Run

FA	Full access to add, edit, and delete evidence records
LA	Read-only access to evidence records
XX	No Access. Evidence cannot be accessed

Field Interviews

Run

FA	Full access to add and edit field interviews in Field Intel
LA	Read-only access to field interviews in Field Intel
XX	No Access. Field Intel cannot be accessed

Incident Based Reporting System (IBRS)

FA	Full access to create IBRS reports
XX	No Access. IBRS reports cannot be created

Submitting Reports

FA	Full access to submit IBRS reports
XX	No Access. IBRS reports cannot be submitted

Offense

CIC

FA	Full access to add and edit CIC entries
LA	Read-only access to CIC entries
XX	No Access. CIC entries cannot be accessed

Submit Property to Evidence, Print Label

FA	Full access to submit property to Evidence and print labels
XX	No Access. Property cannot be submitted to <i>Evidence</i> . Labels cannot be printed

Expunge/Seal

FA	Full access to expunge and seal reports
LA	Read-only access to sealed or expunged reports
XX	No Access. Sealing and expunging functions are disabled. Sealed or expunged reports cannot be accessed.

Narrative

FA	Full access to modify approved narratives
XX	No Access. Approved narratives cannot be modified

Approve

FA	Full access to approve offense reports
XX	No Access. Approval options are disabled

Delete Offense Reports

FA	Full access to delete offense reports
XX	No Access. Report deletion options are disabled

Reports

FA	Full access to create and edit offense reports
LA	Read-only access to offense reports
XX	No Access. Offense cannot be accessed

Pawn Tickets

Attachments

FA	Full access to create and edit attachments
LA	Read-only access to attachments
XX	No Access. Attachments cannot be accessed

Delete Attachments

FA	Full access to delete attachments
LA	Deletion options are only available for attachments created by the current user
XX	No Access. Attachments cannot be deleted

Pawn Hits

FA	Full access to modify pawn hits
XX	No Access. Pawn hits cannot be modified

Import

FA	Full access to import pawn records
XX	No Access. Pawn records cannot be imported

Purge

FA	Full access to purge pawn records
XX	No Access. Purge options are disabled

FA	Full access to add and edit pawn tickets
LA	Read-only access pawn tickets
XX	No Access. Pawn cannot be accessed

Permits/Registration

Adult Entertainment Permits

FA	Full access add and edit adult entertainment pe	ermits
----	---	--------

- LA Read-only access to adult entertainment permits
- **XX** No Access. Adult entertainment permits cannot be accessed

Bicycle Permits

FA	Full access to add and edit bicycle permits
LA	Read-only access to bicycle permits
XX	No Access. Bicycle permits cannot be accessed

Concealed Handgun Permits

FA	Full access to add and edit concealed handgun permits
LA	Read-only access to concealed handgun permits
XX	No Access. Concealed handgun permits cannot be accessed

Configuration

FA	Full access to <i>Permit</i> configuration options
XX	No Access. Permit configuration options cannot be accessed

Delete

FA	Full access to delete permit records
XX	No Access. Deletion options are disabled

Delete MNI Link

FA	Full access to delete the MNI link on a pawn record
XX	No Access. MNI links cannot be deleted

Expired Access

FA	Full access to modify expired permits
XX	No Access. Expired permits cannot be modified

FA	Full access to add and edit permits and registrations
LA	Read-only access to permits and registrations
XX	No Access. Permit cannot be accessed

Taxicab Driver Permits

FA	Full access to add and edit taxicab permits
LA	Read-only access to taxicab permits
XX	No Access. Taxicab permits cannot be accessed

Weapons Purchase Permits

FA	Full access to add and edit weapons purchase permits
LA	Read-only access to weapons purchase permits
XX	No Access. Weapons purchase permits cannot be accessed

RMS Merge

Merge Records

FA	Full access to merge Master Index records (MNI, MBI, MVI, MHI)
XX	No Access. RMS Merge cannot be accessed

Subject Resistance Report

Approve

FA	Full access to approve subject resistance reports
XX	No Access. Approval options are disabled

Run

FA	Full access to add and edit subject resistance reports
LA	Read-only access to subject resistance reports
XX	No Access. Subject resistance reports cannot be accessed

Trespass Warnings

FA	Full access to add and edit trespass warnings
LA	Read-only access to trespass warnings
XX	No Access. TWarn cannot be accessed

Uniform Crime Report: UCR

Run

FA	Full access to create UCR reports
LA	Read-only access to UCR reports
XX	No Access. UCR reporting application cannot be accessed

Submission Disk

FA	Full access to create a UCR submission disk (requires 3.5" diskette)
XX	No Access. A UCR submission disk cannot be created

Review Authority

FA	Full access to perform a UCR review on reports in <i>Offense</i> and <i>Arrest</i> . This will also allow approved reports to be modified without un-approving the report
XX	No Access. UCR Review options are disabled. Approved reports cannot be modified without changing the status.

RMS_CIVIL

Attachments

FA	Full access to create and modify attachments
LA	Read-only access to attachments
XX	No Access. Attachments cannot be accessed

Delete Attachments

FA	Full access to delete attachments
LA	Deletion options are only available for attachments created by the current user
XX	No Access. Attachments cannot be accessed

Change Paper Assignment

FA	Full access to change paper assignments
XX	No Access. Paper assignments cannot be changed

Child Support

FA	Full access to add and modify child support papers
LA	Read-only access to child support papers
XX	No Access. Child support papers cannot be accessed

Criminal

- LA Read-only access to criminal subpoenas
- **XX** No Access. Child support papers cannot be accessed

Domestic Violence

FA	Full access to add and modify domestic violence papers
LA	Read-only access to domestic violence papers
XX	No Access. Domestic violence papers cannot be accessed

Enforceable

FA	Full access to add and modify enforceable papers
LA	Read-only access to enforceable papers

XXNo Access. Enforceable papers cannot be accessed

Executions

FA	Full access to add and modify writs of execution
LA	Read-only access to writs of execution
XX	No Access. Writs of execution cannot be accessed

Non-Enforceable

FA	Full access to add and modify non-enforceable papers
LA	Read-only access to non-enforceable papers
XX	No Access. Non-enforceable papers cannot be accessed

Configuration

FA	Full access to Civil configuration settings
XX	No Access. Civil configuration settings cannot be accessed

RMS_MBI

Add/Edit Records

FA	Full access to add and edit MBI records

XX No Access. MBI records can be neither created nor modified

Attachments

FA	Full access to add and modify attachments
LA	Read-only access to attachments
XX	No Access. Attachments cannot be accessed

Delete Attachments

FA	Full access to delete attachments
LA	Deletion options are only available for attachments created by the current user
XX	No Access. Attachments cannot be deleted

Addresses

FA	Full access to add, edit, and delete addresses in MBI records
LA	Read-only access to addresses in MBI records
XX	No Access. Address information cannot be accessed
	·

Delete Records

FA	Full access to delete MBI records
XX	No Access. MBI records cannot be deleted

Demographics

FA	Full access to edit demographics on MBI records
XX	No Access. Demographics on MBI records cannot modified

View

FA	Full access to view MBI records
XX	No Access. MBI records cannot be viewed
RMS_MI

Vehicle Index

Add

FA	Full access to add vehicle (MVI) records
XX	No Access. Vehicle (MVI) records cannot be created

Delete Attachments

FA	Full access to delete attachments from vehicle (MVI) records
XX	No Access. Attachments cannot be deleted

Add/Edit Attachments

FA	Full access to add and edit attachments in vehicle (MVI) records
XX	No Access. Attachments can be neither created nor modified

View Attachments

FA	Full access to view attachments in vehicle (MVI) records
XX	No Access. Attachments are not accessible

Delete

FA	Full access to delete vehicle (MVI) records
XX	No Access. Vehicle (MVI) records cannot be deleted

Edit

FA	Full access to modify vehicle (MVI) records
XX	No Access. Vehicle (MVI) records cannot be modified

View

FA	Full access to view vehicle (MVI) records
XX	No Access. Vehicle (MVI) records cannot be accessed

Vessel Index

Add

FA	Full access to add vessel (MHI) records
XX	No Access. Vessel (MHI) records cannot be created

Delete Attachments

FA	Full access to delete attachments from vessel (MHI) records
XX	No Access. Attachments cannot be deleted

Add/Edit Attachments

FA	Full access to add and modify attachments in vessel (MHI) records
XX	No Access. Attachments can be neither created nor modified

View Attachments

FA	Full access to view attachments in vessel (MHI) records
XX	No Access. Attachments cannot be accessed

Delete

FA	Full access to delete vessel (MHI) records
XX	No Access. Vessel (MHI) records cannot be deleted

Edit

FA	Full access to modify vessel (MHI) records
XX	No Access. Vessel (MHI) records cannot be modified

View

FA	Full access to view vessel (MHI) records
XX	No Access. Vessel (MHI) records cannot be accessed

RMS_MNI

Master Name Index

Add/Edit Records

FA	Full access to create and modify MNI records
XX	No Access. MNI records can be neither created nor modified

Attachments

FA	Full access to edit attachments
LA	Read-only access to attachments
XX	No Access. Attachments cannot be accessed

Delete Attachments

FA	Full access to delete attachments
LA	Deletion options are only available for attachments created by the current user
XX	No Access. Attachments cannot be deleted

Delete Records

FA	Full access to delete MNI records
XX	No Access. MNI records cannot be deleted

Demographics

FA	Full access to edit demographics in MNI records
XX	No Access. Demographic information cannot be modified

Field Interview (FI) Requests

FA	Full access to add, edit, and delete field interview requests in MNI records
LA	Read-only access to field interview requests
XX	No Access. Field interview requests cannot be accessed

ID Section

FA	Full access to edit ID information in MNI records
XX	No Access. ID information cannot be modified

Addresses

LA Read-only access to address information	
XX No Access. Address information cannot be accessed	

Aliases

FA	Full access to add, edit, and delete alias names in MNI records
LA	Read-only access to alias names
XX	No Access. Alias names cannot be accessed

Features

FA	Full access to modify physical characteristics (<i>Features</i>) information in MNI records
LA	Read-only access to physical characteristics (<i>Features</i>) information
XX	No Access. Physical characteristics (<i>Features</i>) cannot be accessed

Finger Print

FA	Full access to finger print machines
XX	No Access. Fingerprint information cannot be collected

Intel Classifications

FA	Full access to edit intelligence classifications in MNI records
XX	No Access. Intelligence classifications cannot be modified

Missing Persons

FA	Full access to edit missing persons information in MNI records
XX	No Access. Missing persons information cannot be modified

Occupations

FA	Full access to add, edit, and delete occupation information in MNI records
LA	Read-only access to occupation information
XX	No Access. Occupation information cannot be accessed

Organizations

FA	Full access to add, edit, and delete organization affiliations in MNI records
LA	Read-only access to organization affiliations
XX	No Access. Organization affiliations cannot be accessed

Mug Shots

FA	Full access to add, edit, and delete mug shots in MNI records
LA	Read-only access to mug shots
XX	No Access. Mug shots cannot be accessed

Runaway

FA	Full access to edit Runaway status in MNI records
XX	No Access. Runaway status cannot be modified

Street Names

FA	Full access to add, edit, and delete street names (<i>Nicknames</i>) in MNI records
LA	Read-only access to street names (Nicknames)
XX	No Access. Street names (Nicknames) cannot be accessed

View

FA	Full access to view MNI records
XX	No Access. MNI records cannot be accessed

Special Tracking

Add

FA	Full access to add Special Tracking records to MNI records
XX	No Access. Special Tracking records cannot be created

Configure

FA	Full access to configure Special Tracking options
XX	No Access. Special Tracking configuration cannot be accessed

Delete

FA	Full access to delete Special Tracking records from MNI records
XX	No Access. Special Tracking records cannot be deleted

Edit

FA	Full access to edit Special Tracking records	
XX	No Access. Special Tracking records cannot be modified	

View

FA	Full access to view Special Tracking information in MNI records		
XX	No Access. Special Tracking information cannot be accessed		

SMARTWEB

SMART IR ADMIN

Administer SmartIR Site Behavior

FA	Full access to the SmartIR administrative site	
XX	No Access. Administrative site cannot be accessed	

SMART WEB ADMIN

Administer SmartWEB Site Behavior

FA	Full access to the SmartWEB administrative site		
XX	No Access. Administrative site cannot be accessed		



Chapter 3 Master Configuration

Version 9.4

User Manual

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For technical support or questions concerning this manual, please call (800) 374-0101.

CTS America

180 N. Palafox Street
Pensacola, Florida 32502 *Local:* 850-429-0082 *Toll Free:* 1-877-SMARTCOP (762-7826) *Web:* www.cts-america.com *Fax:* 850-429-0522

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Overview

About Master Configuration

Once the CTS America software suite has been installed, it can be tailored for the agency's specific needs. *Master Configuration* allows the administrator to configure the system to meet those needs. Options in *Master Configuration* allow agency-specific information to be entered, such as offense report numbers, units and positions, and the agency logo. The lists created using Master Configuration can also help track and record information about individuals, vehicles, and employees within the agency's specific law enforcement arena.

For example, when setting up the agency, a list of ranks applicable to the agency's officers is created. When adding agency employees in *Employee Master*, this list of ranks is available to assign to employees. If the need arises, the lists set up within *Master Configuration* can be modified. With this flexibility, the system meets your agency's specific needs, in the most expedient manner for your organization.

Software Version Number

The contents of this chapter support Master Configuration version 9.4.

User Assistance Tools

Help

The details here-in are general and not agency-specific. Depending on agency configuration, all information provided may not apply from one agency to another.

Training

Training is conducted on-site by the very people who use and depend on this technology (e.g., officers train officers, dispatchers train dispatchers, etc.).

Support

The CTS America Customer Support Team is available 24 hours a day, 7 days a week. Call toll-free 1-800-374-0101, option 1 for assistance. The Customer Support Team can also be contacted by e-mail for non-critical issues at support@cts-america.com.

About CTS America

Company History

Formerly known as SmartCOP Inc., CTS America was founded by an experienced software engineer. Development of the core products began in 1994 when the engineer became a sworn law enforcement officer and recognized the lack of functionality in the existing public safety technology. This engineer determined that the only way to properly achieve functionality was through the development of a comprehensive, integrated software suite that provided real-time, critical information to first responders. The engineer also realized that the software functionality needed the input of those persons involved in the day-to-day process: deputies, troopers, investigators, dispatchers, administrators, and court clerks. Rather than dictate what an agency should utilize, CTS America listened to and created what its users demanded. The end result: a system that supports the mission of public safety agencies rather than hindering it.

Since then, the CTS America team of engineers have enhanced and expanded the core products into one of the most comprehensive, integrated product suites available. In fact, the company actively and successfully competes in all size markets, with products that scale from an agency of ten officers to thousands of officers.

Company Mission

Our mission is to provide real-time information with increased functionality to enable users to interact with the public they serve with increased safety, effectiveness and efficiency. CTS America has accomplished this by rapidly adapting and modifying complex integrated data systems to provide its customers with the most advanced, comprehensive software solutions proven to reduce crime, increase safety, and boost efficiency.

Contact CTS America

Phone toll-free: 1-800-374-0101

Fax: 850-429-0522

E-mail address: support@cts-america.com

Website: http://www.cts-america.com

Physical Address: 180 North Palafox Street, Pensacola, FL 32502

Using Master Configuration

Logging In and Out

Logging In

- 1. Open *Master Configuration* from the SmartCOP network share directly or using a shortcut on the local computer.
- 2. Enter a username and password.
- 3. If desired, place a check beside **Change Password** to change the password after logging in. If not desired, skip to the next step.
- 4. Press **[Enter]** or click **Login**.
 - If a new password is desired, enter the new password twice in the fields provided. The entry in both fields must match.

Logging Out

Upon clicking the "X" at the top right, clicking on **File**>**Exit**, or pressing **[Alt+X]**, the user is automatically logged out of *Master Configuration*.

Agency Setup

The *Agency Setup* menu allows administrators to configure agency information, ranks, and divisions, in addition to many other options.

Agency List

A list of agencies can be configured in *Master Configuration* for use in referring to other agencies throughout the CTS America software suite. In this list, the primary agency is always the local agency using the software.

1. On the Agency Setup menu, select Agency List.

4)	Agency Configuration	×
Γ	Acronym	Agency	
Þ	ACSO	ALACHUA COUNTY SHERIFFS OFFICE	
	AGO	ATTORNEY GENERALS OFFICE	Add A New Record
	ARA	ARAMARK	
	ART	ART - ALCOHOL REHAB TREATMENT PROGRAM	
	ASO	ALACHUA SHERIFF'S OFFICE	View/Edit Selected Record
	ATF	ALCOHOL, TOBACCO AND FIREARMS	
	AVA	AVALON CENTER/LAKEVIEW	_ *
	BCSO	BAY COUNTY SHERIFFS OFFICE	Set Primary Agency
	CES	TEAM ONE COMMUNICATIONS	
	CTS	SMARTCOP	
	CTSA	CTS-AMERICA SMARTCOP	Close
	DCF	DEPARTMENT OF CHILDREN & FAMILIES	
	DEP	FLORIDA DEPT OF ENVIRONMENTAL PROTECTION	,
Ŀ	C	>	

2. Click on Add A New Record.

10	Agency Conf	iguration Record	×
Acronym			
Agency			
Agency Head		🗌 Include in Inmate	Food Bill Report
Title of Head		Food Bill Pay by	
County of		Federal	
State of	×	○ State	
Population Served	0	0.011-00	
Phone		Other	
Street		Mailing	
Address		Address	
City		City	
State	· · · · · · · · · · · · · · · · · · ·	State	¥
Zip		Zip	
ORI			
Agency Type			
Server			
	Mobile Forms Agency		Add Logo

3. Enter an agency Acronym.



- ✓ The report number for any records (CAD, Offense, Arrest, etc.) created using this agency will use this acronym as part of the report number.
- 4. Enter the full Agency name as it should appear on reports.
- 5. Enter the name of the Agency Head.
- 6. Enter the **Title of Head**, such as Chief, Sheriff, or any other rank.
- 7. If applicable, enter the county where the agency resides in **County of**. State agencies would not designate this information.
- 8. Enter the state where the agency resides in State of.
- 9. Enter the **Population Served** by the agency.

C

- 10. Enter the primary **Phone** number for the agency.
- 11. If applicable, place a check beside **Include in Inmate Food Bill Report**, and designate the agency type paying the food bill.

Include in Inmate Food Bill Report		
	Food Bill Pay by	
	◯ Federal	
	🔘 State	
	◯ Other	

12. Enter agency's street address, including the Address, City, State, and Zip.

Street	
Address	
City	
State	¥
Zip	

13. Enter the agency's mailing address, including the Address, City, State, and Zip.

Mailing		
Address		
City		
State	~	
Zip		

- 14. Enter the agency's **ORI**.
- 15. Choose the **Agency Type** from the drop-down menu.
- 16. If applicable, choose the SQL Server used by the agency record.
- 17. Choose the **Mobile Forms Agency** with which to associate the agency. This is needed when referencing the agency in *Mobile Forms* reports.
- 18. Add a logo for the agency.
 - a. Click Add Logo.

Agency Report Logo (JP	G IMAGE 200x200)
Enter a logo (,jpg) for report headers:	Load Logo from Disk Load Logo from Disk Save Logo to Disk Copy Logo to Clip <u>b</u> oard Remove Current Logo

- b. Click Load Logo from Disk.
- c. Navigate to the JPG file to be used. This should be less than 50 KB in size.
- d. Double, click the file or highlight it and click **Open**.
- e. Click Close.



✓ If this is the primary agency record, set the logo from the <u>Primary Agency</u> <u>Logo (JPG)</u> option in the Agency Setup menu, instead of within the agency record.

- ✓ To ensure access to the logo from all applications, it is highly suggested to do the following:
 - Place the JPG file within the ADM directory where MastCfg.exe resides.
 - Navigate to the directory and file using the UNC path (i.e. $\[Server]\[Share]\SMARTCOP.APP\ADM\)$.
- ✓ Click Save Logo to Disk to save a copy of the current logo to the local computer, a USB drive, or a network location.
- ✓ Click **Copy Logo to Clipboard** to copy it to the local Windows clipboard.
- ✓ Click **Remove Current Logo** to remove the logo from an agency record.
- 19. Click Save & Close.



- ✓ To edit an existing agency, double-click on it or highlight it and click View/Edit Selected Record. The agency record can, then, be modified as needed.
- ✓ To set the primary agency, highlight the agency record and click Set Primary Agency. When within the record, red text indicates this configuration. This is used for report number generation.

Primary Agency Logo (JPG)

The logo for the primary agency is assigned from the *Primary Agency Logo (JPG)* option in the *Agency Setup* menu, instead of within the agency record. Once assigned here, it is used to show the agency logo within applications and copied to the primary agency for use in reports.

1. Click on the Agency Setup menu and select Primary Agency Logo (JPG).



- 2. Click Load Logo from Disk.
- 3. Navigate to the JPG file on the local computer, a USB drive, or a network location.
- 4. Double-click the file or highlight it and click **Open** to apply it to the primary agency.



- ✓ To ensure access to the logo from all applications, it is highly suggested to do the following:
 - Place the JPG file within the ADM directory where MastCfg.exe resides.
 - \circ Navigate to the directory and file using the UNC path (i.e. $\[Server]\[Share]\SMARTCOP.APP\ADM\).$
- ✓ Click Save Logo to Disk to save a copy of the current logo to the local computer, a USB drive, or a network location.
- ✓ Click **Copy Logo to Clipboard** to copy it to the local Windows clipboard.
- ✓ Click **Remove Current Logo** to remove the logo from an agency record.

Agency Specific Next Report Numbers

Master Configuration allows administrators to specify report number generation starting points. For example, if the paper system for offense reports ended at report number 1500, this console may be used to set the next electronic report to be 1501.

Typically, this is not accessed after the CTS America software suite has been initially configured for an agency. Report numbers start over at "1" at the beginning of each year, as the report number includes the current year. For example, SRSO14OFF000001 would be the first offense report of 2014 for SRSO.

1. Click on the Agency Setup menu and select Agency Specific Next Report Numbers.



2. Double-click the agency to be modified, or highlight it and click on **View/Edit** Selected Record.

	A	gency Next	Number	s Re	ecord – 🗆 🗙
Acronym ACSO Agency ALACHUA	COUNT	Y SHERIFFS OF	FICE		
Module Name	Туре	Next Number	Next Year	^	The numbering system will
JailBook	JBN	1	2003		automatically roll over to 1 at the
JailIncident	JIN	1	2003		beginning of each year. When a
JailLog	JLG	1	2003		number is pulled, if the current
JailPrescriptions	JMP	1	2003		year a number was used, then
JailOrder	JOR	1	2003		the current year is set as the last
Master Business Index	MBI	1	2003		year and the numbering system
JailMedical	MED	1	2003		number. In other words, once
Machine Identifier	MID	1	2014		you set these up you never need
Master Name Index	MNI	1	2003		to touch them again.
Offense	OFF	1	2003		
Employee Master	PER	2	2014		
Issue Property	PRT	1	2003		
Pawn Transactions	PWN	1	2003		
UserAccessRole	ROL	1	2003		
Subject Resistance Report	SRR	1	2008		Add Missing Modules
Training	TRN	1	2003		
Tresspass Warnings	TWN	1	2003		<mark>r≓</mark> ¥
Fleet Management	VEH	1	2003		Save & Close
ļ				~	gare et crose

- 3. For each module, set the Next Number and the Next Year.
 - a. Enter the next sequential number in the *Next Number* column. The final digits of the report increment using this number.
 - b. Press [Tab] to move to the *Next Year* column.
 - c. Enter the current year in which this number was used.
- 4. When finished, click **Save & Close**.
- 5. Repeat steps 2 through 4 for each agency requiring next number assignmentments.
- 6. When finished, click Close.



✓ The agency acronym serves as the first portion of the report number, followed by the current year and an abbreviation for the report type. The final digits of the report increment according to the next number shown in this console. ✓ Click Add Missing Modules to add any additional modules the agency may use that are not currently listed. When all modules are listed, this feature is disabled.

•	P	Agency Next	Number	s ke	co	ra –		Í
Acronym ACSO								
Agency ALACHUA COUNTY SHERIFFS OFFICE								
Module Name	Туре	Next Number	Next Year	^		Module Name	Type	
JailBook	JBN	1	2003		•	Master Vehicle Index	MVI	
JailIncident	JIN	1	2003		ľ	Master Vessel Index	MHI	
JailLog	JLG	1	2003			Permits	PMT	
JailPrescriptions	JMP	1	2003			SmartiR	WCR	-
JailOrder	JOR	1	2003			Smartin	werk	-
Master Business Index	MBI	1	2003					
JailMedical	MED	1	2003					
Machine Identifier	MID	1	2014					1
Master Name Index	MNI	1	2003				,	
Offense	OFF	1	2003			_		
Employee Master	PER	2	2014			😋 Add		
Issue Property	PRT	1	2003					
Pawn Transactions	PWN	1	2003					
UserAccessRole	ROL	1	2003					
Subject Resistance Report	SRR	1	2008					
Training	TRN	1	2003					
Tresspass Warnings	TWN	1	2003			*		
Fleet Management	VEH	1	2003					

- Select the module to be added.
- o Click Add.
- Use the steps above to set up the module's report numbers.

Agency Unit Configuration List

Agency units are configured in *Master Configuration* using the *Agency Unit Configuration List*. The units configured here are, then, used in *Employee Master* to designate individual employee assignments to each unit.

1. Click on the Agency Setup menu and select Agency Unit Configuration List.

)	Agency /	Unit Configura	ation			×
Agency	Agency Unit	District	Archive	Status	^	
ACSO	ACSO					
BCSO	BCSO					Add A New Record
DEP	DEP	1				
ECSO	ECSO			In Use		
FHP	FHP			In Use		View/Edit Selected Record
FHP	FHP\A	TASK		In Use		×
FWCC	FWCC	0		In Use		Delete Selected Percent
GBPD	GBPD			In Use		Delete selected Record
MPD	MPD			In Use		
MPD	SHF/CHF/MAJ/OPS/INV/NARCOTICS/MPD		~			Close
NPS	NPS	ADM		In Use		2000
OCSO	0CS0			In Use		
OPD	OPD/CHF/MAJ/OPS/INV/NARCOTICS	NARC		In Use		
OPD	OPD/CHF/MAJ/OPS/PATROL	1				
OTH	OTHER AGENCY					
PDO	PDO\	ADM		In Use		
PHS	PRISON HEALTH SERVICES	ADM		In Use		
PJC	PENSACOLA JUNIOR COLLEGE			In Use		
PNJ	PENSACOLA NEWS JOURNAL			In Use		
PPD	PENSACOLA POLICE DEPARTMENT	ADM		In Use		

2. Click Add A New Record.

-9	Agency Unit Configuration Record	×
Agency:	Archive	
District Default to show when (in CAD.	CallNos/Units are placed on duty	Save & Close

- 3. Click the ellipsis (...) beside the *Agency* field to select an agency with which to associate the new unit record.
 - a. To search for the desired agency, begin entering the agency acronym in the **Search Characters** field. The selected agency in the list will change based upon the information entered.
 - b. Double-click on the desired agency, or highlight it and click **OK**.

4. The *Unit* field is automatically populated with the acronym of the chosen agency followed by a back slash (\). Enter additional information designating the agency's corresponding unit in the *Unit* field.



- ✓ Each subdivision, indicating nesting units, should be separated by another slash.
- ✓ The unit name may use the default back slash (\) or a forward slash (/). Do not, however, use both in the same unit name.
- \checkmark To reduce confusion, use the same slash type for all units.
- 5. Click the ellipsis (...) beside the *District* field to select the CAD district to automatically assign members of the unit when they are placed on duty.
 - a. To search for the desired district, begin entering the district name in the **Search Characters** field. The selected district in the list will change based upon the information entered.
 - b. Double-click on the desired agency, or highlight it and click **OK**.



✓ All districts are four (4) characters long. Any district that appears to be less than four (4) characters has "padding" before the district name. This results in spaces before the district name. For example, a one-digit/character district name will have three preceding spaces.

Take the spaces into account when searching.

- 6. When finished entering agency unit information, click Save & Close.
- 7. When finished with the agency unit configuration list, click **Close**.



- ✓ To archive an agency unit that is not in use, place a check beside Archive within the unit record, and then click Save & Close.
 - Any unit to which at least one unit is assigned cannot be archived.
 - Employees cannot be assigned to archived units.
- ✓ To edit an existing agency unit, double-click it in the list or highlight it and click View/Edit Selected Record.

✓ To delete an agency unit, highlight it in the list, and click Delete Selected Record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Agency Unit Positions List

Unit positions may be set up in the *Agency Unit Positions List*. These are used to designate an employee's role within their unit group. This should not be confused with the rank, though rank may be included within the unit position name.

1. Click on the Agency Setup menu and select Agency Unit Positions List.

Agency Unit Po	ositio	ns ×
Position	^	P
ADMIN ASSISTANT ADMIN CLERK I ADMIN CLERK II ADMIN CLERK II BOOKING CLERK BOOKKEEPER, ASST CIVIL PROCESS CLERK CIVIL PROCESS SERVER CIVIL PROCESS SUPV COMM SHIFT LEADER COMPUTER REPAIR TECH CONTROL ROOM OPER COURIER COURIER CRIME ANALYSIS SUPV CRIME ANALYST		Add A New Record
CRIME ANALYST ASSIST	~	

- 2. Click on **Add A New Record**. A new line is added at the bottom of the list allowing the new position name to be entered.
- 3. Enter a unique name for the unit position.
- 4. When finished, click **Close**.



- ✓ To edit an existing agency unit position record, double-click the record in the unit position list. The position name can be directly edited in the list.
- ✓ To delete an agency unit position record, highlight the record, and then click Delete Selected Record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Agency Unit, Station, and Complaint Attributes

Attributes are used to help match similar objects throughout the system. Units, complaints, and stations will be assigned attributes. The system will then suggest appropriate actions based on the matching attributes. Attributes help in determining unit recommendations and station move-ups.

1. Click on the *Agency Setup* menu and select **Agency Unit/Station/Complaint Attributes**.

🙄 Unit /	Station / Con	nplaint Attribu	ites	2	×
	Attrib	ute			^
Description			ID		
CTS-AMERICA			CTS/	Д	
EXPLOSIVE ORDINANCE DETACH	MENT		EOD		
ENVIRONMENTAL PROTECTION			EVN		
JOINT TASK FORCE BRAVO			JTFB		
LAW ENFORCEMENT SWORN			LE		
WEIGHTS AND BALANCES			PME	L	
TEST QA			QA		
SPECIAL WEAPONS AND TACTICS			SWA	Т	
THIS IS A TEST			WOV	N	
					~
📝 Edit 🛛 🔯 Find	🗶 Delete	🕈 Add	🔓 Close	Icon Preview	/
Attributes are used to help match complaints and stations will be as appropriate actions based off of n determining unit recommendatio	similar objects th signed attributes. natching attribute ns and also statio	roughout the system will t The system will t es. Attributes help n move-ups.	tem. Units, hen suggest in		

2. Click Add.

-	Edit Attributes	×
ID: D. Comments:	escription:	
	Thange Icon	ose

- 3. Enter a unique 4-character **ID** and **Description** in the fields provided.
- 4. Enter any **Comments** regarding the attribute in the field provided.
- 5. To add an icon for the attribute, click Change Icon.
 - a. Navigate to the ICO file to be used.
 - b. Double-click on the file, or highlight it and click **Open**.
- 6. When finished with the attribute record, click **Save & Close**.
- 7. When finished creating or modifying attributes, click Close.



- ✓ To edit an attribute, double-click the record or highlight it and click **Edit**.
 - To remove the logo, click **Clear Icon**.
- ✓ To find the attribute to be modified or viewed, click Find and enter either the Description or the ID.
 - Click **Cancel** to return to the full list without searching.
- ✓ To delete an attribute, select the desired record and click **Delete**. Press **[Y]** or click **Yes** to confirm the deletion.
- ✓ If an icon exist for a given attribute, it will appear in the lower left corner of the attribute window.
- ✓ Attributes configured here are listed on the *Attribute Lookup* window when setting up general station information and when assigning attributes to employees.

Agency Divisions List

Agency divisions can be created for assigning employees to indicate shifts or individual assignments within the unit. They are used in *Employee Master*.

1. Click on the Agency Setup menu, and select Agency Divisions List.

-	Agency Divisions List		×
Г	Division		>
	A-SHIFT		
	A-SHIFT ACR		
	A-SHIFT SECURITY		
	A.I.M.		
	A.I.M./G.P.S. UNIT		
	Admin Service/Prof Standa		
	ADMINISTRATION		
	ADMINISTRATIVE SERVICES		
	AIM		
	AIM UNIT		
	ARAMARK		
	ARAMARK - FAC. MAINT.		
	ARAMARK - FACILITY MAINT.		~
	Add A New Record Edit Selected Record Delete	Close	
		Close	

2. Click Add New Record.

	Record View	- 🗆 🗙
Div	ision	
		A Cancer

- 3. Enter the Division name and click OK or press [Enter].
- 4. When finished, click **Close**.



- ✓ To edit an existing record, highlight the desired division, and then click Edit Selected Record.
- \checkmark Division names that are currently in use cannot be modified.
- ✓ To delete an existing division, highlight the division and click **Delete**. Press [Y] or click **Yes** to confirm the deletion. All employee records assigned to this division will lose their division assignment.

Station Configuration

Use this option to define stations to which units may be assigned.

1. Click on the *Agency Setup* menu and select **Station Configuration**.

19	Station Configuration	×
Station Name	Description	
D1	DISTRICT 1	
D2	DISTRICT 2	
D3	DISTRICT 3	
D4	DISTRICT 4	
D5	DISTRICT 5	
D6	DISTRICT 6	
D9	DISTRICT 9	
QA	QUALITY ASSURANCE	
QA1	INSPECTION	
Edit [Enter]	Add [Insert]	

2. Click Add or press [Insert] to create a new station.

29		Ed	it Station Configuration	×
General Stat	ion Informa	tion		
Station ID Latitude	0.000000	Description Longitude	0.000000	
NOTE: Latitud	e and Longit	ude values are	used to calculate distances used by the recommendation engine.	
Iconic Repre	sentation The change			
Alarm Settin	gs			
✓ Enabled Description Code				
Station Attri	butes			
Attribute		Description	I	
<u>≁</u> <u>A</u> dd	*	<u>R</u> emove		
			🖡 Save & <u>C</u> lo	se

- 3. Under *General Station Information*, enter the **Station ID**, **Description**, **Latitude** and **Longitude** in the fields provided.
- 4. To add an *Iconic Representation* for the station, click Change.
 - a. Navigate to the ICO file to be used.
 - b. Double-click on the file, or highlight it and click **Open**.
- 5. To make it possible for dispatchers to send an alarm to the station, place a check beside **Enabled** under *Alarm Settings*.
 - a. Enter a **Description** for code sent to this station.
 - b. Enter the **Code** to be used to send an alarm to this station.
- 6. Click **Add** under *Station Attributes* to assign specific attributes to this station. For information regarding attribute creation, refer to <u>Agency Unit</u>, <u>Station</u>, and <u>Complaint Attributes</u>.
- 7. When finished configuring the station, click Save & Close.
- 8. When finished working with *Station Configuration*, click **Close**.



- ✓ To edit an existing station record, double-click the record or highlight it and click Edit.
- ✓ To delete a station from the list, select the desired station and click Delete. Press
 [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.
- ✓ To remove attributes from a station, open the station record, highlight the attribute to be removed, and click **Remove**.

Court Location Configuration

The *Court Location Configuration* allows administrators to configure court types that will be available in CTS applications.

13		Court Configuration		
Code	Court Title	Active	^	
CI	CIVIL	 ✓ 		*
CR	CIRCUIT	✓		Add A New Record
CTS	AMERICA			
DC	DISTRICT COURT	✓		
ECS	TRAFFIC#5	✓		Edit Selected Record
JU	JUVENILE	✓		
MA	COUNTY#2	✓		
ME	COUNTY#4	✓		Inactivate Selected Record
мо	COUNTY#1	✓		
MS	MISC	✓		I
MW	COUNTY#3	✓		<u>C</u> lose

1. Click on the Agency Setup menu and select Court Location Configuration.

- 2. Click Add A New Record.
- 3. Enter the court Code and Court Title. The Active check box is selected by default.
- 4. Click **Close**, when finished.



- ✓ To edit an existing court record, highlight the record and click Edit Selected Record.
- ✓ To disable an active court record, highlight the record and click Inactivate Selected Record.
- ✓ To enable an inactive court record, highlight the record and click Activate Selected Record.
- ✓ The *Inactivate Selected Record* and *Activate Selected Record* buttons share placement on *Court Configuration* window. The available button depends upon the status of the currently selected court record.

Default Area Code

The default area code configured here is used throughout the CTS America software suite when a phone number is needed. When this information has been configured, the area code can be automatically populated in phone number fields.

1. Click on the Agency Setup menu and select Default Area Code.

Default Area Code Configuration						
لی Default Area Code						
850						
Show Details	OK Cancel					

- 2. Enter the **Default Area Code**.
- 3. Click OK.

Governor Names

A list of current governors in the United States of America and its territories can be maintained in in the *Governor Names* listing. Records cannot be created, but there are several blank records to allow for potential additions.

1. Click on the Agency Setup menu and select Governor Names.

	Governor Names	×
State	Governor	Close
		•

- 2. Scroll through the list to find the state or territory to be updated. Records are in alphabetical order.
- 3. Once the state has been found. Double-click in the *Governor* column to change the governor listed.

Unit Roles

Master Configuration allows administrators to create roles that can be assigned to employees. These roles are assigned in *Employee Master* and utilized in *SmartCAD* to track unit activity.

1. Click on the Agency Setup menu and select Unit Roles.

9	9	Configure Unit Roles						
	Role ID	Role Description		^				
►	CSI	CRIME SCENE INVESTIGATION						
	CTS-AMERICA	PRIDE OF LAW ENFORCEMENT						
	DIVER	DIVE TEAM						
	ENGINEER	ENGINEER TEAM						
	FTO	FIELD TRAINING OFFICER						
	GM	Grand Master						
	HONOR	HONOR GUARD						
	IA	INTERNAL AFFAIRS						
	К9	K9 OFFICER						
	MC	MAJOR CRIMES						
	QA	QUALITY ASSURANCE						
	SPANISH	SPANISH TRANSLATOR						
	SRSO	RESOURCE OFFICER						
	SUP	SUPPORT						
	SUPPORT LEVEL	SUPPORT 2						
	SWAT	SWAT TEAM		~				
	₽ Add	Edit Delet	te <u>C</u> lose					

2. Click Add.

	Edit U	nit Role ×
ID: Descripti	ion	
	✔ OK	X Cancel

- 3. Enter a unique role **ID** and **Description**.
- 4. Click **OK**, when finished entering role information.
- 5. When finished working with unit roles, click **Close**.



- ✓ To edit an existing unit role record, double click the record or highlight it and click Edit.
- ✓ To delete a unit role record, highlight the record and click Delete. Press [Y] or click Yes to confirm the deletion. Otherwise, Press [N] or click No.

Employee Rank List

1. Click on the Agency Setup menu and click Employee Rank List.



- 2. Click Add A New Record. A new line is added to the bottom of the list.
- 3. Enter the employee rank name in the line provided.
- 4. Click **Close** when finished.



- \checkmark To edit an existing rank record, double-click the desired rank in the list.
- ✓ To delete a rank record, select the desired rank from the list and click Delete Selected Record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Employee Classification List

The positions created here are used in *Employee Master* to further specify an employee's role in the agency.

1. Click on the Agency Setup menu and select Employee Classification List.

Employee Classification	on ×
Position	
ADMINISTRATIVE CLERK I	
ADMINISTRATIVE CLERK II	Add A New Record
ADMINISTRATIVE CLERK III	
BOOKING CLERK	<u>*1</u>
BOOKING CLERK II	Delete Selected Record
BOOKKEEPER, ASSIST.	
CAPTAIN LAW ENFORCEMENT OPERATIONS	
CIVIL PROCESS SERVER	Close
CIVIL PROCESS SUPERVISOR	<u>_</u> lose
COMMUNICATIONS DISPATCHER I	
COMMUNICATIONS DISPATCHER II	
COMMUNICATIONS DISPATCHER SHIFT LEADER	
COMMUNICATIONS SUPERVISOR	
COMPUTER REPAIR TECHNICIAN I	
COURIER	
COURT SECURITY DEPUTY SHERIFF	
CRIME ANALYST	
CRIME ANALYST ASSISTANT	
CRIME SCENE SUPERVISOR	
CRIME SCENE TECHNICIAN I	
×	

- 2. Click Add A New Record. A blank line is created at the bottom of the list.
- 3. Enter the name of the new employee classification in the *Position* column.
- 4. When finished, click **Close**.



- \checkmark To edit an existing classification record, double-click the desired record in the list.
- ✓ To delete a classification record, highlight it in the list and click Delete Selected Record. Press [Y] of click Yes to confirm the deletion. Otherwise, press [N] or click No.

Employee History Field Mappings

Administrators can designate the fields in employee records in which to track changes, and the changes to be tracked. These changes are, then, logged in the *History* tab within the individual employee records.

1. Click on the Agency Setup menu and select Employee History Field Mapping.

-	l			Employ	ree	e History 1	Fransaction Types	;	×													
	Table_Name	Field_Name	^			Table	Field	Transaction Type	^													
	EMPMAST	DEFAULT_ALARM_LOC			Þ	EMERGEN	HADDRESS	Emergency Contact Home Address Chi														
	EMPMAST	HIDE				EMERGEN	HPHONE	Emergency Contact Home Phone Char	1													
	EMPMAST	OTHER				EMERGEN	NAME	Emergency Contact Name Changed														
	EMPMAST	PRIMARYAGENCY				EMERGEN	NOTIFIER	Emergency Contact Notifier Changed														
	EMPMAST	UNIT06				EMERGEN	RELATION	Emergency Contact Relation Changed														
	EMPMAST	UNIT06_POS				EMERGEN	SSN	SSN Changed														
	EMPMAST	UNIT07				EMERGEN	WADDRESS	Emergency Contact Work Address Cha														
	EMPMAST	UNIT07_POS				EMERGEN	WPHONE	Emergency Contact Work Phone Chan														
	EMPMAST	UNIT08		Add <u>R</u> emove	<u>A</u> dd <u>R</u> emove	Add Eemove		EMPMAST	ADDRESS	Home Address Changed												
	EMPMAST	UNIT08_POS					[R emove	emove	R emove		EMPMAST	AGENCY	Agency Changed									
	EMPMAST	UNIT09	Remove							Remove	Remove	Remove	Remove	Remove	Remove	Remove	Remove	Remove	Remove	<u>R</u> emove	Remove E	EMPMAST
	EMPMAST	UNIT09_POS						EMPMAST	ALARM_STATION_PA	Agency Changed												
	EMPMAST	UNIT10				EMPMAST	EMPMAST ALARM_UNIT Agency Changed	Agency Changed														
	EMPMAST	UNIT10_POS					EMPMAST	ALARM_UNIT_PA	Agency Changed													
	EMPMAST	UNLISTED				EMPMAST	APPOINTD	Appointed Date Changed														
						EMPMAST	ASSIGNED_STATION	Assigned Station Changed														
							EMPMAST	BADGE_NUMBER	Badge Number Changed													
			¥			EMPMAST	BLOODTYPE	Blood Type Changed	~													
								Close														

The grid on the left side displays a list of fields that can be added or removed. The grid on the right side displays the list of configured fields that will display on the *History* tab within an employee record in *Employee Master*.

- 2. Select the field on the left that should be tracked in history and click **Add**. The field selected moves to the right side.
- 3. Select a *Transaction Type* from the drop-down menu. Transaction types are configured under *Employee History Transaction Types*.
- 4. Click **Close** when finished.



- ✓ To remove a field from being tracked in history, select the field in the list on the right, and click **Remove**. That field will, then move to the list on the left.
- ✓ A transaction type must be selected for each field. The window cannot be closed until all fields have a transaction type selected.

Employee History Transaction Types

Administrators can track changes to employee records in *Employee Master* using the *History* tab in each employee record. The *Employee History Transaction Types* console allows them to configure "transaction types," or custom labels, that are recorded on the *History* tab when the tracked field on an employee record has been changed.

1. Click on the *Agency Setup* menu and select **Employee History Transaction Types**.

4	Employee History Tran	saction Types	×
	Description	^	
	Agency Changed		
	Agency Created ID Changed		Add A New Record
	Agency Created ID Type Changed		
	Apparatus Checkbox Changed		<u>*</u>
	Appointed Date Changed		Delete Selected Record
	Assigned Station Changed		
	Badge Number Changed		
	Blood Type Changed		Close
	Call No Changed		<u>_</u> ,,
	Cellular Phone Number Changed		
	CIC Certification Expiration Date Changed		
	CIC Login Changed		
	CIC Notification Days Changed		
	CIC Show Expiration Checkbox Changed		
	Classification of Special Skills Changed		
	Default Unit Role Changed		
	Dispatch Changed	~	

- 2. Click Add A New Record. A new record is added at the bottom of the list.
- 3. Enter a unique Description.
- 4. Click **Close** when finished.



- \checkmark To edit an existing record, double-click it in the list.
- ✓ To delete a record, select it in the list and click Delete Selected Record. Press
 [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.
Employee Termination Reasons

1. Click on the *Agency Setup* menu and select **Employee Termination Reasons**.

	Employee Termination Reasons		×
Description Death of Employee Dismissed Insurbordination Layoff Released during Probation Resigned Separated		Add A New Record	

- 2. Click Add A New Record. A new record is created at the bottom of the list.
- 3. Enter the termination reason in the *Description* column.
- 4. Click **Close** when finished.



- \checkmark To edit an existing record, double-click it in the list.
- ✓ To delete a record, select it in the list and click Delete Selected Record. Press
 [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Employee ID Types

ID Types are used to designate an employee's primary assignment on an ID when printed from *Employee Master*.

1. Click on the Agency Setup menu and select Employee ID Types.



2. Click Add A New Record.

Employee ID Type	×
Description:	
OK Cancel	

- 3. Enter a **Description** for the ID.
- 4. Press [Enter] or click OK.
- 5. Click Close when finished.



✓ Employee ID types are active immediately upon creation. Click Set Active/Inactive to toggle the record status between active and inactive.

- ✓ Inactive records are indicated by the description having been crossed out (as with TEST in the screenshot above).
- ✓ To edit an existing record, double-click it or highlight it and click on View/Edit Selected Record.
- ✓ To delete a record, highlight it and click on **Delete** selected record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Finger Print Card ID Label

Administrators can create a label for Finger Print ID Cards in compliance with agency requirements.

1. Click on the Agency Setup menu and select Finger Print Card ID Label.

Finger Print ID Card Label C ×
ID Card Label
OK Cancel

- 2. Enter the **ID Card Label**.
- 3. Click OK.

Finger Print Machine List

Use this option to configure fingerprinting machines used by the agency. The settings configured here determine how information is transferred from the Master Name Index to the Identix or CrossMatch fingerprinting systems.

1. Click on the Agency Setup menu and select Finger Print Machine List.

9	9				Finger Print Machine Configurati	on	×
		Active	Default	Fingerprint Machine Vendor	Description	IP Address	
				IDENTIX TP3000ED	FINGER PRINT	192.168.11.135	
		✓	~	CrossMatch	LiveScan	192.168.11.135	Add A New Record
				IDENTIX	SCIdentixInterface	192.168.11.135	
							View/Edit Selected Record
							× 1
							Delete Selected Record
						~	
	<					>	
	ļ	Finger	Print Ma	achine DLL Filename	Chable Feature		Close
		ScLive	ScanInte	erface.dll			2
	-						

2. Enter the settings to allow sending demographic information to the fingerprint interface from the Master Name Index (*Options>Send Demographics to Finger Print Machine* in *Master Index*).

Finger Print Machine DLL Filena	me	✓ Enable Feature
ScLiveScanInterface.dll		

- a. Enter the Finger Print Machine DLL Filename.
- b. Place a check beside **Enable Feature**.
- 3. Click Add A New Record.

19	Add/Edit Finger Print Machine Configuration	×
Description Type Request Path:	IP Address IP Address ▶ Port	
Read Path Write Path:	User Name Arrow Cancel	

- 4. Enter a **Description** for the fingerprint machine.
- 5. Place a check beside **Active** to indicate the machine is in use.
- 6. Choose the **Type** from the drop-down menu.

	/
IDENTIX IDENTIX TP3000ED CrossMatch	

7. Enter the information needed for sending and receiving data with the interface.



- ✓ When writing to an FTP (file transfer protocol) location, the following information is needed:
 - **IP Address**: The location, on the local network, where fingerprint information is stored.
 - **Port**: The port on which the location is accessed.
 - **User Name**: If authentication is required, enter the username to be utilized.

- **Password**: Enter the password associated with the username.
- Write Path: Indicate the folder at the location where the information should be written. The folder name should be followed by a backslash (\).
- ✓ The following fields are available for configuring the fingerprint interface. However, they may not all be needed. Leave any unneeded field blank.
 - o IP Address
 - o Port
 - o User Name
 - o Password
 - o Request Path
 - o Read Path
- 8. When finished adding a machine, click Save & Close.
- 9. When finished adding fingerprint machines, click Close.



- ✓ To edit an existing machine record, double-click it in the list or highlight it and click on View/Edit Selected Record.
- ✓ To delete a machine record, highlight it in the list and click on Delete Selected Record.

Email Options

1. Click on the Agency Setup menu and select Email Options.



- 2. Use the drop-down list to indicate if automatic notification e-mails should be sent to the employee's default client e-mail address.
- 3. Click **OK** when finished.

Password Options

Passwords requirements can be set to minimum security or they may be set to be CJIS compliant. Most agencies are required to comply with CJIS guidelines.

1. Click on the Agency Setup menu and select Password Options.

-	Password Options ×
	Use CJIS compliant passwords? No 🗸
	Minimum Password Length : 3
	Maximum Password Length : 15
	✓ OK X Cancel

- 2. Use the drop-down to indicate whether or not CJIS-compliant passwords will be utilized.
- 3. Set the **Minimum Password Length**. CJIS compliance requires this to be at least eight (8) characters.
- 4. Set the **Maximum Password Length**. Passwords can be up to fifteen (15) characters long, whether or not they are CJIS-compliant.
- 5. When finished setting password options, click **OK**.

Non-CJIS password Requirements

- Minimum Password Length: 3
- Maximum Password Length: 15

CJIS-Compliant Password Requirements

- Passwords cannot contain the "@" symbol.
- Minimum Password Length: 8
- Maximum Password Length: 15
- Invalid Password Options:
 - o User Name
 - o Password
 - o Drowssap
- The password cannot be a dictionary word in any language.

- The password cannot be a proper name.
- The password cannot be the same as the previous ten (10) passwords utilized.

ID Cards

The appearance of ID cards can be tailored with specific logos, colors, and signatures for each applicable employee rank. When badges are printed from *Employee Master*, the options configured here are applied.

1. Click on ID Cards in the menu bar. The ID Card Config window appears.



2. Click Add A New Record.

)		ID Card C	onfiguration	
Card Description Layout		~	Check indicates ite be displayed on ca	:m will rd
Title Bar Color	None	~		
Title Bar Line 1			Sex Issue	d Date
Title Bar Line 2			Race Expir	e Date
Card Main Line 1				
Card Main Line 2			Margins (maximun	n of 1"):
Card Main Line 3			Тор 0.0	0 🜩
Card Main Line 4			Bottom 0.0	
Signature Block			Left 0.0	
Expire Date	~	•	Right 0.0	0 🗧
ommission Text		_	Paper Size:	
			Height 0.	0 🜲
			Width 0.	0 🖨
Main Image	e (agency seal)	Sub Image (state seal)		
			Signature	
1	9			
View/Edit	Main Image	View/Edit Sub Image	View/Edit Signature Image	Close

- 3. Enter a unique Card Description.
- 4. Select the **Layout** of the ID (*Portrait* or *Landscape*) from the drop-down menu.
- 5. If desired, choose a **Title Bar Color** from the drop-down menu or using the ellipsis (...) to the right.



- ✓ Color selection is not limited to the 20 colors immediately available in the dropdown menu or the 48 colors available in the *Color* console.
- ✓ Click **Define Custom Colors** on the *Color* console (available by clicking on the ellipsis), to define a custom color using the crosshairs on a rainbow color palette and fine-tuning in the bar to the right of the palette.



- ✓ Once the desired color has been achieved in the box below the palette, click Add to Custom Colors to add it to the available colors on the left.
- ✓ Up to sixteen (16) custom colors can be created.
- 6. Enter the text that should appear in the title bar in **Title Bar Line 1** and **Title Bar Line 2**.
- Enter the main text that should appear on the ID in Card Main Line 1, Card Main Line 2, Card Main Line 3, and Card Main Line 4.
 - a. The contents of *Card Main Line 1* appear prior to the employee's name on the ID.
 - b. The contents of *Card Main Line 2*, *Card Main Line 3* and *Card Main Line 4* appear consecutively on the ID below the employee's name.
- 8. Enter the name and rank of the signer as it should appear below the signature on the ID in the **Signature Block** field.
- 9. If applicable, enter an expiration date for IDs.

- 10. If applicable, enter any further **Commission Text** in the field provided.
- 11. Place a check beside each item that should be displayed on the card.

Check indicates item will be displayed on card			
DOB Sex Race Rank		Employee ID Issued Date Expire Date	

- 12. Enter the top, bottom, left and right margins (up to 1").
- 13. Enter the height and width of the ID card.
- 14. Add a Main Image (agency seal) to the ID template.
 - a. Click View/Edit Main Image.



- b. Click Load Logo from Disk.
- c. Navigate to the desired JPG file on the local computer, a USB drive, or a network location.



- ✓ It is recommended that the file be stored in a network location accessed by a UNC path when the logo is added to the ID.
- d. Double-click the file or highlight it and click **Open** to apply it to the ID template.
- e. Click Close when finished.



- ✓ Click Save Logo to Disk to save a copy of the current logo to the local computer, a USB drive, or a network location.
- ✓ Click **Copy Logo to Clipboard** to copy the current logo to the local Windows clipboard.
- ✓ Click **Remove Current Logo** to remove the current logo from the ID template.
- 15. Add a **Sub Image (state seal)** to the ID template.
 - a. Click View/Edit Sub Image.

 Sub Image (State Seal)	(JPG IMAGE	400x300)	×
		11	
		Load Logo from Dis	k
		, F	
		<u>S</u> ave Logo to Disk	
		Copy Logo to Clip <u>b</u> oa	rd
		<u>R</u> emove Current Log	o
		ļ	
		<u>C</u> lose	

- b. Click Load Logo from Disk.
- c. Navigate to the desired JPG file on the local computer, a USB drive, or a network location.



- ✓ It is recommended that the file be stored in a network location accessed by a UNC path when the logo is added to the ID.
- d. Double-click the file or highlight it and click **Open** to apply it to the ID template.
- e. Click **Close** when finished.



✓ Click Save Logo to Disk to save a copy of the current logo to the local computer, a USB drive, or a network location.

- ✓ Click **Copy Logo to Clipboard** to copy the current logo to the local Windows clipboard.
- ✓ Click **Remove Current Logo** to remove the current logo from the ID template.

16. Add a **Signature** to the ID template.

a. Click View/Edit Signature Image.

-13	Signature (JPG IMAGE 400x300)	
		1
		Load Signature from Disk
		Ē
		Paste Signature From Clipboard
		F
		Save Signature to Disk
		Copy Signature to Clip <u>b</u> oard
		Remove Current Signature
		<u>Close</u>

- b. Click Load Signature from Disk.
- c. Navigate to the desired JPG file on the local computer, a USB drive, or a network location.



- ✓ It is recommended that the file be stored in a network location accessed by a UNC path when the signature is added to the ID.
- d. Double-click the file or highlight it and click **Open** to apply it to the ID template.
- e. Click **Close** when finished.



✓ Click Paste Signature From Clipboard to apply a signature stored in the local Windows clipboard. Immediately prior to using this option, copy the signature to the clipboard.

- ✓ Click Save Signature to Disk to save a copy of the current signature to the local computer, a USB drive, or a network location.
- ✓ Click Copy Signature to Clipboard to copy the current signature to the local Windows clipboard.
- ✓ Click **Remove Current Signature** to remove the current signature from the ID template.
- 17. Click **Close** when finished creating the ID template.
- 18. Click Close when finished working with the ID Card Config window.



- ✓ To edit an existing ID card template, double-click the record in the list, or highlight it and click View/Edit Selected Record.
- ✓ To delete an ID card template, highlight it and click Delete Selected Record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Miscellaneous Lists

Race Options

The races available in the CTS America software suite can be configured in *Master Configuration*. A default list is created on initial setup, but can be modified, as needed.

Race options must be mapped to a valid FBI description to be utilized in UCR-reported incidents.

1. Click on the *Miscellaneous Lists* menu and select **Race List**.

- 2. Click Add A New Record. A new line is created at the bottom of the list.
- 3. Designate a unique 1- or 2-character abbreviation for the race under the *Race* column.
- 4. Enter the name of the race in the *Description* column.

5. Click Link To FBI Code.

	Link to FBI Code	x
<u>S</u> earch	n Characters	
F	FBI DESCRIPTION	^
► A	Chinese, Japanese, Filipina, Korean, Polynesian, Indian, Indonesian, Asian Indian, Samoan, or any other Pacific Isl	
В	A person having origins in any of the black racial groups of Africa	
1	American Indian, Samoan, or any other Pacific Islander	
U	Of Indeterminable race	
W	Caucasian, Mexican, Puerto Rican, Cuban, or South American, or other Spanish culture or origin, regardless or race	е
		~
<	>	

- a. Search for the code by entering the one-letter abbreviation in the **Search Characters** field. The selected record changes based upon the character entered.
- b. Double-click the desired code or highlight it and click **OK**.
- 6. When finished, click Close.



- \checkmark To edit an existing race record, double-click the record.
- ✓ To delete a race record, highlight the record and click Delete Selected Record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Gender (Sex) List

The gender listing is used by the Master Name Index when recording individual characteristics. A default list is provided during initial configuration.

1. Click on the Miscellaneous Lists menu and select Gender (Sex) List.

		Gender	x
Gender U F M	Description UNKNOWN FEMALE MALE	A Add A New Record Add A New Record Pelete Selected Record Link To FBI Code	
		↓ Qose	

- 2. Click Add A New Record. A new record is created at the bottom of the list.
- 3. Enter a 1-character designation for the new gender record.
- 4. Enter an expanded *Description* for the new gender record.
- 5. Click Link To FBI Code to link the gender to an accepted FBI gender code.

	Lir	nk to FBI C	ode	×		
<u>S</u> e	Search Characters					
Ι						
	Gender Code	Desciption	FBI_KEYLINK	^		
►	U	Unknown	2			
	F	Female	0			
	М	Male	1			
				۷.		
				_		
		<u>o</u> k	🗙 Cancel			

- a. Search for the code by entering the one-letter abbreviation in the **Search Characters** field. The selected record changes based upon the character entered.
- b. Double-click the desired code or highlight it and click **OK**.
- 6. When finished, click Close.



- \checkmark To edit an existing gender record, double-click the record.
- ✓ To delete a gender record, highlight the record and click Delete Selected Record.
 Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Hair Color List

A list of hair colors are available for use by the Master Name Index in recording individual characteristics. A default list is provided at initial configuration.

CODE	DESCRIPT	ERT CODE	ERI DESCRIPTION		7
CODE	DESCRIPT	FBI CODE	PBI DESCRIPTION	<u>^</u>	4
BLD	Bald	BAL	BALD		
BLK	Black	BLK	BLACK		Add A New Record
BLN	Blonde	BLN	BLOND OR STRAWBERRY		
BLU	Blue	BLU	BLUE		X
BRO	Brown	BRO	BROWN		
DBL	Dark Blonde	BLN	BLOND OR STRAWBERRY		Delete Selected Record
DBR	Dark Brown				
GLD	Gold				
GRY	Gray	GRY	GRAY OR PARTIALLY GRAY		Lieb To ERI Code
ONG	Orange				LINK TO FBI Code
PLE	Purple				
PNK	Pink				
RED	Red	RED	RED OR AUBURN		Class

1. Click on the *Miscellaneous Lists* menu and select Hair Color List.

- 2. Click Add A New Record. A new record is created at the bottom of the list.
- 3. Enter a brief 3-character designation for the new hair color code in the *Code* column.
- 4. Enter an expanded *Description* for the hair color record.
- 5. Click Link To FBI Code to associate the hair color with an accepted FBI hair color.

		Link to FBI Code		×				
<u>S</u> ε	Search Characters							
	FBI CODE	FBI DESCRIPTION	HAIR_ID	^				
►	BAL	BALD	1					
	BLK	BLACK	2					
	BLN	BLOND OR STRAWBERRY	3					
	BLU	BLUE	10					
	BRO	BROWN	4					
	GRN	GREEN	11					
	GRY	GRAY OR PARTIALLY GRAY	5					
	ONG	ORANGE	12					
	PLE	PURPLE	14					
	PNK	PINK	13					
	RED	RED OR AUBURN	6	\mathbf{v}				
				_				
		🖌 <u>о</u> к	🗶 Cancel					

- a. Search for the code by entering the abbreviation in the **Search Characters** field. The selected record changes based upon the character entered.
- b. Double-click the desired code or highlight it and click **OK**.
- 6. When finished, click **Close**.



- \checkmark To edit an existing hair color record, double-click the record.
- ✓ To delete a hair color record, highlight the record and click Delete Selected Record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Eye Color List

A list of eye colors are available for use by the Master Name Index in recording individual characteristics. A default list is provided at initial configuration.

1. Click on the *Miscellaneous Lists* menu and select **Eye Color List**.

			Eye Color		- 🗆 🗙
CODE BLU BRO GRN GRY HAZ	DESCRIPTION F Black E Blue E Brown E Green C Gray C Hazel F	=BI CODE BLK BLU BRO GRN GRN GRY HAZ	Eye Color FBI DESCRIPTION BLACK BLUE BROWN GREEN GRAY HAZEL	^	Add A New Record
				<u> </u>	

- 2. Click Add A New Record. A new record is created at the bottom of the list.
- 3. Enter a brief 3-character designation for the new hair color code in the *Code* column.
- 4. Enter an expanded *Description* for the hair color record.
- 5. Click Link To FBI Code to associate the hair color with an accepted FBI hair color.

		Link to FBI Code		×					
<u>S</u> e	<u>S</u> earch Characters								
	FBI CODE	FBI DESCRIPTION	EYES_ID	^					
Þ	BLK	BLACK	1						
	BLU	BLUE	2						
	BRO	BROWN	3						
	GRN	GREEN	5						
	GRY	GRAY	4						
	HAZ	HAZEL	6						
	MAR	MAROON	7						
	MUL	MULTICOLORED	8						
	PNK	PINK	9						
	XXX	UNKNOWN	10						
				¥					
				_					
		🗸 <u>о</u> к	🗶 Cancel						
		-	• •						

- a. Search for the code by entering the abbreviation in the **Search Characters** field. The selected record changes based upon the character entered.
- b. Double-click the desired code or highlight it and click **OK**.
- 6. When finished, click **Close**.



- \checkmark To edit an existing eye color record, double-click the record.
- ✓ To delete an eye color record, highlight the record and click Delete Selected Record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

US States and Abbreviations

The *US States and Abbreviations* console is used to store the names and abbreviations for states and territories of the United States of America, in addition to foreign country names and abbreviations. This information is used throughout the CTS America software suite. A default list is provided at initial setup.

1. Click on the Miscellaneous Lists menu and select US States/Abbreviations.

Sta	te / C	ountry A	bbrevations
Description	Code	^	
Albania	AA		
ALBERTA	AB		Add A New Record
Andorra	AD		
Anguilla	AE		<u>*</u>
AFGHANISTAN	AF		Delete Selected Record
Aguascalientes	AG		
Ashmore&Cartier Isl	AH		
Antigua and Barbuda	AI		Close
Aruba	AJ		Close
ALASKA	AK		
ALABAMA	AL		

- 2. Click Add A New Record. A new record is created at the bottom of the list.
- 3. Enter the full state or country name in the *Description* column.
- 4. Enter the 2-character abbreviation for the state or country in the *Code* column.
- 5. When finished, click **Close**.



- \checkmark To edit an existing abbreviation record, double-click the record.
- ✓ To delete an abbreviation record, highlight the record and click Delete Selected Record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

RMS

The *RMS* menu provides configuration options that are used in specific Records Management System applications, such as the Master Name Index, the Master Business Index, Offense, and Case Management.

MNI

The *MNI* sub-menu provides configuration options for data collection in the Master Name Index.

MNI Organizations and Gang List

A list of organizations and gangs can be created in *Master Configuration* for use in the Master Name Index to track and record individuals' organization and gang affiliations.

1. Click on the *RMS Menu*, highlight *MNI*, and click on **MNI Organizations** / **Gang List**.

)	MNI Organizations /	Gang List	×
NAME	C1	C2 ^	
3RD GENERATION BROWN BOYS	BIKER GANG	SEE INTEL FOR MORE INTE	
3RD SQUAD CRIPS			Add A New Record
69 FOLK	STREET GANG		
ALLIANCE PEOPLE NATION			× 1
ARYAN BROTHERHOOD			Delete Selected Record
ARYAN NATION			-
BANDITIOS			
BARRINEAU BOYS			
BLACK GANGSTER DISCIPLES BGD	FOR MORE INFO CONTACT SO INTEL		Close
BLOODS			
BROWN BOYS			
CANTONMENT CRIPS			
CARSON KIWI			
CRIPS			
DEUCE			
<		>	

- 2. Click Add A New Record. A new line is created at the bottom of the list.
- 3. Enter the *Name* of the organization or gang in the column provided.
- 4. Two comment columns are available for each record, *C1* and *C2*. Enter any comments that will aid in readily identifying members of the gang or organization.
- 5. When finished, click Close.



- \checkmark To edit an existing gang record, double-click the record.
- ✓ To delete a gang record, highlight the record and click Delete Selected Record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

MNI Intel Classification Setup

In addition to the standard intel flags built into the Master Name Index, agencies may configure up to twelve (12) custom intel classifications to appear on MNI records.

• Burglar	Registered Criminal	Concealed Weapon
Prior FTA	Convicted Felon	• Suicide [Risk/Threat]
Prior DUI	Prison Releasee	• Law Enforcement
• Violent	Armed Robber	• State Attorney
Gang Associate	Narcotics Violator	• Private Attorney
Gang Member	Universal Precautions	• SHO (Juvenile)
• Sex Predator	Mentally Challenged	• Deceased
• Sex Offender	Physically Challenged	
• Sex Offender	• Thysican's Chancinged	

The following intel flags are part of the Master Name Index and cannot be changed:

1. Click on the *RMS* menu, highlight *MNI*, and select **MNI** Intel Classification Setup.

3 MNI Intel U	er Configurable Intel Classifications
01:	07:
04:	10:
06:	12:
NOTE: ONCE YOU SET TH BEING USED OR ELSE YOU	ESE UP THEY SHOULD NOT BE CHANGED IF THEY ARE MAY RISK HAVING A PERSON CLASSIFIED IMPROPERLY.

- 2. Using fields 01 through 12, enter the names of any desired intel flags.
- 3. When finished, click **Save & Close**.



- ✓ Once a custom intel flag has been configured, it should not be changed, except in the case of spelling errors, as it may be in use on MNI records.
- ✓ Custom intel flags are listed on MNI records immediately following the default flags.

Special Tracking Configuration

The *Special Tracking Configuration* console allows administrators to customize the items tracked in the *Special Tracking* section of Master Name Index records.

To access Special Tracking options, click on the *RMS* men, highlight *MNI*, and select **Special Tracking Configuration**.

29		Special Tracking Configura	ation	×
Lookup Choices State	ments			
Sexual Offender 1	reatment Status	Source of Information	Tracking Type	Type of Offense
Alert Type	Conviction Type	Monitoring Status	Offender Tier	Release Status
Address check require Employment check re Fingerprints required Registration required	d quired		· •	Add A New Record

Lookup Choices

The *Lookup Choices* tab is selected, by default, when the *Special Tracking Configuration* window opens. Each of the tabs on the *Lookup Choices* tab provides options for designating the choices available for each of the referenced drop-down menus in the Special Tracking documentation within an MNI record.

Sexual Offender T	reatment Status	Source of Information	Tracking Type	Type of Offense
Alert Type	Conviction Type	Monitoring Status	Offender Tier	Release Status
ddress check require	d		^	1
mployment check red	quired			Add A New Pecord
ngerprints required				Add A New Record
egistration required				
				View/Edit Selected Record
				*
				Set Active/Inactive

The process for adding choices to each tab is the same, regardless of the location.

1. Click Add New Record.

Special Tracking Configurat	×
Description:	

- 2. Enter a **Description**. This serves as the value that will appear in the drop-down menu.
- 3. Click OK.
- 4. When finished working with the *Special Tracking Configuration*, click **Close**.



- ✓ To edit an existing lookup choice, double-click it or highlight it and click View/Edit Selected Record.
- ✓ Lookup choices cannot be deleted, but they can be disabled. Select the lookup choice to be modified and click **Set Active/Inactive**.
- ✓ An inactive lookup choice is marked with a line through the text (Choice).

Statements



The *Statements* tab is used to configure the specific text that appears on the forms presented to persons subject to special tracking. Four tabs are used on a long form:

• *Long Form Introduction*: Enter the statement that should appear as an introduction to the long form. This may be instructions to the officer.



• *Long Form Statements to Initial*: This tab is used to provide the statement text that the violator will need to initial. Statements may be added or re-ordered using the buttons on the right.



- o Add Statement: Add a new statement to the list.
- **Move Statement Up**: Move the currently selected statement up in the list.
- **Move Statement Down**: Move the currently selected statement down in the list.



- ✓ Statements are printed in the order they are presented in the list.
- ✓ Statements cannot be deleted, but they can be disabled by removing the check mark from the *Include* column.

• *Long Form Conclusion*: This tab is used to set the statement signed by the violator acknowledging the receipt of the statements and instruction from the officer.



• *Short Form Statement*: This tab is used set the statement used on short form tracking forms signed by the violator.



When finished working with the *Special Tracking Configuration*, click **Close**.

Photo Line-Up

The *Photo Line-Up* menu option allows administrators to configure a custom statement to be printed at the end of a photo line-up created from *Master Index*.

1. Click on the *RMS* menu, highlight *MNI*, and select **Photo Line-Up**.



- 2. Enter the text to appear after the photos in a printed line-up.
- 3. Click Save & Close.
- 4. Press **[Y]** or click **Yes** to confirm saving and closing the window. Otherwise, press **[N]** or click **No**.

Offense and Case Management

The options available under *Offense/CaseMgmt* affect the behavior of the *Offense* and *Case Management* applications.

Report Configuration

The *Report Configuration* option is used to enable or disable Domestic Violence Supplements and Subject Resistance Reports in *Offense* and *Case Management*.

1. Click on the *RMS* menu, highlight *Offense/Case Mgmt*, and select **Report Configuration**.



2. Set the desired *Report Section* as *Available* or *Unavailable*, by doubleclicking it or highlighting it and clicking on **Set Available/Unavailable**.



- ✓ A report section that has been disabled is flagged by a strikethrough going through the section name (Report).
- 3. When finished, click **Close**.

Case Management Solvability Recommendations

A case's potential solvability is determined by a series of questions configured under <u>Case Management Solvability Questions</u>. Each potential response to a question is assigned a point value. The recommendation provided by the system is determined by the total point value and the information entered in <u>Case</u> <u>Management Solvability Recommendations</u> for specific ranges of total point values.

1. Click on the *RMS* menu, highlight *Offense/Case Mgmt*, and select **Case Management Solvability Recommendations**.

)	Cas	e Management Solva	bility Recomme	endations	×
Points	Case Status	Suspense Days	Review Days		^
0 - 20	Active	0	0		
21 - 40	Active	30	30		
41 - 60	Active	15	15		
61 - 80	Active	10	10		
81 - 100	Active	5	5		
					*
4					

2. Click Add A New Record.

🗐 Case I	Management Solvab	ility Action Recom	mendation ×
For Point Range Low I O Toto	High Case Sta	end These Settings atus Susp	ense Days Review Days
		🔒 Save	e X Cancel

3. Under *For Point Range*, enter the **Low** and **High** values for the point range being considered.

Note: Point ranges cannot overlap.

4. Select the desired **Case Status** from the drop-down menu.

- 5. Enter the desired number of **Suspense Days** and **Review Days** in the fields provided. The numbers can be manually entered or set using the arrow buttons on each field.
- 6. When finished, click **Save**.
- 7. When finished working with the *Case Management Solvability Options* window, click **Close**.



- ✓ To modify an existing recommendation, double-click the record or highlight it and click on **View/Edit Selected Record**.
- ✓ To delete a recommendation, highlight the record and click on **Delete**.

Case Management Activity Types

The *Case Management Activity Types* option is used to designate activity types that can be recorded when documenting an investigation.

1. Click on the *RMS* menu, highlight *Offense/Case Mgmt*, and select **Case Management Activity Types**.

29		Case Managemer	nt Activity Types		×
Descriptio	n				^
Backgrou	nd Check				
Interviews	;				
Investigati	ion				
					•
4			X		
<u>A</u> dd A N	ew Record	View/Edit Selected Record	Set Active/Inactive	<u>C</u> lose	

2. Click Add A New Record.

Case Management Activity	×
Description:	

- 3. Enter a **Description** for the activity. This will serve as the option the officer will choose when recording investigation activity.
- 4. Click OK.
- 5. When finished, click **Close**.



- ✓ To modify an existing record, double-click on it or highlight it and click on View/Edit Selected Record.
- ✓ Activity types cannot be deleted, but they can be disabled. Highlight the activity type to be changed and click on **Set Active/Inactive**.
- ✓ An inactive activity type is denoted by a strikethrough over the description (Activity).

Case Management Team Roles

Team roles are used in *Case Management* when setting up the investigation team. When an officer is added to the investigation team, the role needs to be set. The roles available in the drop-down menu are configured here.

1. Click on the *RMS* menu, highlight *Offense/Case Mgmt*, and select **Case Management Team Roles**.

29	Case Manageme	ent Team Roles		×
Description				^
Administration				
Background Checks				
Backup Investigator				
Canvas Area				
Case Screener				
Case Supervisor				
Crime Scene Photographer				
Crime Scene Technician				
Crime Sence Investigator				
Entry Team (SW)				
Internal Affairs				
Interviews				
Polygraph Operator				
Prosecuting Team				
Public Affairs				
Surveillance				
Under Cover				
Victim Advocate				
				\sim
				_
₽ <u>`</u>		*		
Add A New Record View/	dit Selected Record	Set Active/Inactive	<u>C</u> lose	

2. Click Add A New Record.

Case Management Team R	×
Description:	

- 3. Enter a **Description**. This will be the display value when choosing a role in the investigative team.
- 4. Click **OK** or press **[Enter]**.
- 5. When finished working with team roles, click **Close**.



- ✓ Once created, roles cannot be deleted, but they can be disabled. Highlight the desired role, and click on Set Active/Inactive to disable an active role or enable an inactive role.
- ✓ Inactive roles are moved to the bottom of the list and are flagged by a strikethrough on the role name (Team Role).
- ✓ To modify an existing team role record, double-click it or highlight it and click on View/Edit Selected Record.

Case Management Solvability Questions

Solvability questions are used in conjunction with *Case Management Solvability Recommendations* to determine the probability of solving a case and suggest a status for the investigation based upon that probability. Questions, their weight, and the order of their appearance are fully configurable.

1. Click on the *RMS* menu, highlight *Offense/Case Mgmt*, and select **Case Management Solvability Questions**.

Case Management Solvability Question	5		×
Questions	Weight	^	
Is there a good possibility of solving?	9		
Was there a witness to the incident?	10		
Can the suspect be identified (Named, lineup, etc.)	9		
Was the suspect arrested?	9		
Suspect description only	9		
Vehicle Description/License Available?	9		
ls stolen property identifiable?	9		
Is there significant physical evidence?	9		
Is there an unusual M.O.?	9		Ŷ
Is this a major crime? (Injury, death, etc.)	9		
Is there a high level of public/citizen concern?	9		
Was property marked?	9		
12 of 12 questions are enabled.	109		
			_
Add A New Record View/Edit Selected Record Set Active/Inactive	<u></u>	lose	

2. Click Add A New Record.

	Case Management Solvability Question	×
Question	Save	Weight

3. Enter a **Question** in the field provided. It should be a question for which the potential answers are *Yes* or *No*. In the event that the answer to the question is *Yes*, the weight of question is added to the solvability score.

4. Designate the **Weight** of the question.



- ✓ This number can be entered manually or using the up and down arrows on the right side of the field.
- ✓ Typically this is on a scale of 1-10, but it can be given as much solvability consideration as deemed necessary by the administrator.
- ✓ When setting the weight of questions, keep in mind the ranges entered for the <u>Case Management Solvability Recommendations</u> to ensure the maximum potential solvability score is considered in the configured ranges.
- 5. Click Save.
- 6. When finished working with solvability questions, click **Close**.



- ✓ Once created, questions cannot be deleted, but they can be disabled. Highlight the desired question, and click on Set Active/Inactive to disable an active question or enable an inactive question.
- ✓ Inactive questions are flagged by a strikethrough on the question and weight values. (Question).
- ✓ Use the blue up and down arrows on the right of the window to move the selected question record up or down in the list.
- ✓ To modify an existing question record, double click the record, or highlight it and click on **View/Edit Selected Record**.

Subject Resistance Configuration

The *Subject Resistance Configuration* is used to set up drop-down menu options shown when creating a Subject Resistance Report associated with an offense report.

1. Click on the *RMS* menu, highlight *Offense/Case Mgmt*, and select **Subject Resistance Configuration**.

19	Subject Resistan	ce Configurati	ion	×
Resistance Location	Resistance	ce Occurred	Resistance Types	
Control Measures	Extent of Injury	Injury Location	n Reason for Action	n
Description Description Description Baton Control Hold Baton Open & Present Baton Strike Channeling Choke Hold Control Holds Defensive Weapons EMD - Displayed EMD - Electronic Shiel EMD - ESB EMD - HandHeld EMD - TASER Escort Holds Felony Handcuffing Firearm Drawn Flashlight Strike Handcuffs	d		Add A New Record	rd
K-9 Apprehension				
K-9 Presence				
* Supplemental Data	Collected on Bold it	tems	Qose	

Each of the tabs is used to set up the drop-down menu options available in in a Subject Resistance Report.

2. Click Add A New Record.

Subject Resistance Configu	x
Description:	
OK Cancel	
OK Cancel	

- 3. Enter the **Description**. This will serve as the drop-down menu option.
- 4. Click OK.

5. When finished working with the *Subject Resistance Configuration*, click **Close**.



- ✓ On the *Control Measures* tab only, records can be marked for requiring supplemental data when that option is selected in the report. Highlight the desired record and click **Collect Supplemental Data** to toggle the requirement.
- ✓ Records requiring supplemental information are marked in bold print.
- ✓ Once created, options cannot be deleted, but they can be disabled. Highlight the desired option, and click on Set Active/Inactive to disable an active option or enable an inactive option.
- ✓ Inactive options are flagged by a strikethrough on the description (Description).
- ✓ To modify an existing option record, double click the record, or highlight it and click on **View/Edit Selected Record**.

Domestic Violence Configuration

The *Domestic Violence Configuration* allows administrators to designate the default text for the Statement of Rights on Domestic Violence Reports.

1. Click on the *RMS* menu, highlight *Offense/Case Mgmt*, and select **Domestic Violence Configuration**.



2. Use the drop-down menu to specify the default text for the Statement of Rights.

read and gave	¥
gave	~
read and gave	
was unable to g	Υ.

3. When finished, click **Close**.

Property Items

The *Property Items* console is used to configure property types used in Arrest, Offense, Case Management and Evidence. The property types created here must also be mapped to a valid UCR type to be used in incidents that are reportable to state and federal governments.

1. Click on the *RMS* menu and select **Property Items**.

		Proper	ty Type	s	
Description	Vehicle	Pawn Purg	e Firearm	Florida UCR	
Auto Accessory/Part				Auto Accessory/Part	4
Automobile	-			Auto	
Bicycle				Bicycle	Add A New Record
BIO SAMPLE					
Boat Motor				Miscellaneous (Non-Ve	Edit Selected Record
BOOK/MAGAZINE					
BULLET/ AMMUNITION					× 1
Bus	-			Trucks & Buses	Set Active/Inactive
Camera/Photo Equipment				TV, Radios, Stereos	
CELL PHONE					
CHECK/NEGOTIABLE					
Clothing/Fur				Clothing and Furs	Firearms
Computer Equipment				Office Equipment	Pawn Purge Items Hide Inactive Property
Construction Machinery				Miscellaneous (Non-Ve	
Credit Card/Non-Negotiable				Miscellaneous (Non-Ve	
CREDIT CARD/NON-NEGOTIBLE					
CURRENCY/COIN				Currency, Note, Etc	
Currency/Negotishle				Currency Note Etc	Close
`				>	<u>c</u> iose

2. Click Add A New Record.

	Add/Edit Property Type	×
Description		
✓ Active	Identifies property types that will appear as choices to select in various applications.	
U Vehicle	Distinguishes whether an item is a vehicle or property item in applications where vehicles are recorded separately from property.	
🗌 Firearm	ldentifies property types that are classified as firearms for the purpose of flagging pawn transactions of firearms by known felons.	
🗌 Pawn Purge	Identifies items that will be included in the Pawn Purge process.	
Mapped to: Florida UCR Pr	operty Type	
	OK Cancel	

3. Enter a **Description**.

- 4. As applicable, place checks beside Active, Vehicle, Firearm, and/or Pawn Purge.
 - Active: Identifies property types that will appear as choices to select in various applications. This must be checked to have the new property type become available in RMS applications.
 - **Vehicle**: Distinguishes whether an item is a vehicle or not in applications where vehicles are recorded separately from property.
 - **Firearm**: Identifies property types that are classified as firearms for the purpose of flagging pawn transactions of firearms by known felons.
 - **Pawn Purge**: Identifies items that are included in the Pawn Purge process.
- 5. Use the drop-down menu in the *Mapped to* section to map the property type to a valid UCR or NIBRS property code.
- 6. When finished, click **OK**.
- 7. When finished working with property types, click Close.



- ✓ To modify an existing property type, double click the record or highlight it and click on Edit Selected Record.
- ✓ Once created, property types cannot be deleted, but they can be disabled. Highlight the desired property type, and click on **Set Active/Inactive** to disable an active property type or enable an inactive property type.
- ✓ Depending upon the view options on the right, inactive options are either flagged by a strikethrough on the description (Property Type) or are not shown in the list.
- ✓ The view options on the right can be used to show or hide specific property types and inactive property types.

View
Non-Vehicle Types
✓ Vehicle Types
✓ Firearms
🖌 Pawn Purge Items
✓ Hide Inactive Property

By default, all options are selected.
Business Types

Business types created here are available throughout the Records Management Software suite of applications.

1. Click on the *RMS* menu and select **Property Items**.

😕 Bus	siness Type Configuration	- 🗆 🗙
Business Type Description	Link To Standard Type	Active
ATTORNEY	ATTORNEY	✓
BONDSMAN	BONDSMAN	✓
CTS AMERICA	OTHER	✓
HIGHER EDUCATION INST.	HIGHER EDUCATION INST.	✓
RETAIL	OTHER	✓
SCHOOL	SCHOOL	✓
87)		
Add New Record Edit Sele	A Model Active Set Active/Inactive	<u>C</u> lose

2. Click Add New Record.

🗐 Busi	ness Type Edit	_ (×
Description			
Linked to: OTHER			¥
✓ Enabled	Identifies business types as choices to select in va	s that will a arious appl	appear lications.
	OK	С	ancel

- 3. Enter a **Description**. This will serve as the display value when choosing the business type on reports.
- 4. Choose the UCR/NIBRS business type to which to link the new business type from the **Linked to** drop-down menu.
- 5. Ensure **Enabled** is checked. This identifies the business type as available for use in reports. It is checked by default on new business type records.
- 6. When finished, click **OK**.



- ✓ To modify an existing business type, double-click the record or highlight it and click on Edit Selected Record.
- ✓ Once created, business types cannot be deleted, but they can be disabled. Highlight the desired business type, and click on Set Active/Inactive to disable an active business type or enable an inactive business type.
- ✓ Inactive options are flagged by moving to the bottom of the list, converting the text to italics, and the absence of a check in the *Active* column.

NCIC Codes

NCIC Property Code List

This list is used in the SmartRMS suite to track property related to the commission of crimes. A default list of codes is provided when the software is initially configured.

1. Click on the NCIC Codes menu and select NCIC Property Code List.



- 2. Click Add A New Record. A new record is added at the bottom of the list.
- 3. Enter a unique **Code** for the property.
- 4. Enter a unique **Description** for the property.
- 5. When finished, click **Close**.



- ✓ To modify an existing NCIC Property record, double-click it in the list.
- ✓ To delete an NCIC Property record, highlight it and click Delete Selected Record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Vehicles

Vehicle Color List

This list used in Master Vehicle Index (MVI) as well as in reports when entering vehicle information. A default list of colors is provided at the initial installation of the software.

1. Click on the *Vehicles* menu and select **Vehicle Color List**.

-			Vehicle Color	×
	Code	Description	^	
Þ	MUL	*Multicolored (First Part of Cod		
	COL	*Multicolored (Second Part of (Add A New Record
	BGE	Beige		
	BLK	Black		č 1
	BLU	Blue		Delete Selected Record
	DBL	Blue, Dark		
	LBL	Blue, Light		
	BRZ	Bronze		Close
	BRO	Brown		<u></u>
	CHR	Chrome/Stainless Steel		
	CPR	Copper		
	GLD	Gold		
	GRY	Gray		
	GRN	Green		
	DGR	Green, Dark		
	LGR	Green, Light	¥	

- 2. Click Add A New Record. A new line is added to the bottom of the list.
- 3. Enter a 3-character **Code** for the color. This should be readily identifiable by the user as the color it represents.
- 4. Enter the full name of the color in the *Description* column.
- 5. When finished, click **Close**.



- \checkmark To modify an existing vehicle color record, double-click it in the list.
- ✓ To delete a vehicle color record, highlight it and click Delete Selected Record.
 Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Vehicle Style

This list used in Master Vehicle Index (MVI) as well as in reports when entering vehicle information. A default list of vehicle styles is provided at the initial installation of the software.

1. Click on the Vehicles menu and select Vehicle Style.



- 2. Click Add A New Record. A new line is added to the bottom of the list.
- 3. Enter a Body Style.
- 4. When finished, click Close.



- \checkmark To modify an existing vehicle style record, double-click it in the list.
- ✓ To delete a vehicle style record, highlight it and click Delete Selected Record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Bond Types

Bond options are defined by CTS personnel during installation. However, the options in this menu can be accessed to determine which bond options should appear in SmartRMS and SmartJAIL applications.

Judge Bond Labels

1. Click on the *Bond Types* menu and select **Judge Bond Labels**.

Set Up Judge Bond Labels		
Purpose	Display Label	<u>Use</u>
01) No Bond	None	✓
02) Cash	Cash	◄
03) Any	Any	✓
04) Professional	Pro	✓
05) PreTrial If Qualify	PtrlQ	✓
06) ROR	ROR/Sign	✓
07) PreTrial	PTR	
08)		
09)		
10)		
These labels determine which checkboxes show in CTS applications. NOTE: These labels are set up by the CTS installation team based on agency configuration. If a new bond option is needed, contact CTS Support.		
<u>S</u> ave	<u>C</u> lose	

- 2. Use the check boxes to the right of the bond labels to indicate which bond options should appear in SmartRMS and SmartJAIL. Leave a check box empty if that bond option should not be available to users.
- 3. Click Save.
- 4. When finished, click **Close**.

LEO Bond Labels

1. Click on the *Bond Types* menu and select **LEO Bond Labels**.

Set Up LEO Bond Labels			×
Purpose		Display Label	<u>Use</u>
01) No Bond		None	✓
02) ROR		ROR	✓
03) Cash		Cash	✓
04) Any		Any	✓
05) PreTrial If (Qualify	Pre Trial If Qualify	◄
06) Profession	al	Professional	✓
07)			
08)			
09)			
10)			
These labels determine which checkboxes show in CTS applications. NOTE: These labels are set up by the CTS installation team based on agency configuration. If a new bond option is needed, contact CTS Support.			
Save Close			

- 2. Use the check boxes to the right of the bond labels to indicate which bond options should appear in SmartRMS and SmartJAIL. Leave a check box empty if that bond option should not be available to users.
- 3. Click Save.
- 4. When finished, click **Close**.



Chapter 4 Fleet Management

Version 9.4

User Manual

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For technical support or questions concerning this manual, please call (800) 374-0101.

CTS America

180 N. Palafox Street
Pensacola, Florida 32502 *Local:* 850-429-0082 *Toll Free:* 1-877-SMARTCOP (762-7826) *Web:* www.cts-america.com *Fax:* 850-429-0522

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Overview

About Fleet Management

The *Fleet Management* module of the SmartADMIN suite is used to track and assign details about vehicles and vehicle equipment used by the agency. Employee records created in *Employee Master* are used to assign vehicles to specific employees.

Software Version

The contents of this chapter support Fleet Management version 9.4.

User Assistance Tools

Help

The details here-in are general and not agency-specific. Depending on agency configuration, all information provided may not apply from one agency to another.

Training

Training is conducted on-site by the very people who use and depend on this technology (e.g., officers train officers, dispatchers train dispatchers, etc.).

Support

The CTS America Customer Support Team is available 24 hours a day, 7 days a week. Call toll-free 1-800-374-0101, option 1 for assistance. The Customer Support Team can also be contacted by e-mail for non-critical issues at support@cts-america.com.

About CTS America

Company History

Formerly known as SmartCOP Inc., CTS America was founded by an experienced software engineer. Development of the core products began in 1994 when the engineer became a sworn law enforcement officer and recognized the lack of functionality in the existing public safety technology. This engineer determined that the only way to properly achieve functionality was through the development of a comprehensive, integrated software suite that provided real-time, critical information to first responders. The engineer also realized that the software functionality needed the input of those persons involved in the day-to-day process: deputies, troopers, investigators, dispatchers, administrators, and court clerks. Rather than dictate what an agency should utilize, CTS America listened to and created

what its users demanded. The end result: a system that supports the mission of public safety agencies rather than hindering it.

Since then, the CTS America team of engineers have enhanced and expanded the core products into one of the most comprehensive, integrated product suites available. In fact, the company actively and successfully competes in all size markets, with products that scale from an agency of ten officers to thousands of officers.

Company Mission

Our mission is to provide real-time information with increased functionality to enable users to interact with the public they serve with increased safety, effectiveness and efficiency. CTS America has accomplished this by rapidly adapting and modifying complex integrated data systems to provide its customers with the most advanced, comprehensive software solutions proven to reduce crime, increase safety, and boost efficiency.

Contact CTS America

Phone toll-free: 1-800-374-0101

Fax: 850-429-0522

E-mail address: support@cts-america.com

Website: http://www.cts-america.com

Physical Address: 180 North Palafox Street, Pensacola, FL 32502

Using Fleet Management

Logging In and Out

Logging In

- 1. Open *Fleet Management* from the SmartCOP network share directly or using a shortcut on the local computer.
- 2. Enter a username and password.
- 3. If desired, place a check beside **Change Password** to change the password after logging in. If not desired, skip to the next step.
- 4. Press [Enter] or click Login.
 - If a new password is desired, enter the new password twice in the fields provided. The entry in both fields must match.

Logging Out

Upon clicking the "X" at the top right, clicking on **File**>**Exit**, or pressing **[Alt+X]**, the user is automatically logged out of *Fleet Management*.

Keyboard Shortcuts and Menu Options

Main Application Window

To Do This	Press This Key	Or Use the Mouse Here
View Selected Vehicle Record	[Alt+V]	Click View Vehicle or Double-click the record
Add Vehicle Record	[Alt+A]	Click Add Vehicle
Delete Selected Vehicle Record	[Alt+D]	Click Delete Vehicle
Archive/Unarchive Selected Vehicle Record	[Alt+I]	Click Archive Vehicle/Unarchive Vehicle
Find a Record	[Spacebar] or [Alt+F] or [Ctrl+F]	Click Find or Click in the desired search field

To Do This	Press This Key	Or Use the Mouse Here
Sort Search Results	[F4]	Options>Sort>[Sort Order]
Update All Odometer Readings	[Alt+U]	Options>Update Odometer Readings
Add Maintenance Record	[Alt+M]	Options>Add Maintenance Record
View Archived Vehicle Records	[Alt+W]	Options>View Archived Records
Enter Fuel Tickets	[Alt+T]	Fuel>Enter Fuel Tickets
Import Fuel from Text File	[Alt+F]	Fuel>Import Fuel From Text File
Export Vehicles to Text File	[Alt+E]	Fuel>Export Vehicles to Text File
View Fuel Import Log	[Alt+L]	Fuel>View Fuel Import Log
Access Configuration Options	[Alt+C]	Options >Configuration

Configuration

To Do This	Press This Key	Or Use the Mouse Here
Access Fuel Employee ID tab	[F1]	Options>Fuel Employee ID or Click on <i>Fuel Employee ID</i> tab
Access Fuel File Configuration tab	[F2]	Options>Fuel File Configuration or Click on <i>Fuel File Configuration</i> tab
Access Funding Sources tab	[F3]	Options>Funding Sources or Click on <i>Funding Sources</i> tab
Access Maintenance tab	[F4]	Options>Maintenance or Click on <i>Maintenance</i> tab

To Do This	Press This Key	Or Use the Mouse Here
Access Makes & Models tab	[F5]	Options>Makes & Models or Click on <i>Makes & Models</i> tab
Access Vehicle Usage Categories tab	[F6]	Options>Vehicle Usage Categories or Click on <i>Vehicle Usage Categories</i> tab
Access Vendors tab	[F7]	Options>Vendors or Click on <i>Vendors</i> tab
Edit Configuration Option (any tab)	[Alt+E]	Click on Edit [Setting] button
Add Configuration Option (any tab)	[Alt+A]	Click on Add [Setting] button
Delete Configuration Option (any tab)	[Alt+D]	Click on Delete [Setting] button
Close <i>Configuration</i> window	[Alt+C]	File>Close or Click Close button

Within a Fleet Vehicle Record

To Do This	Press This Key	Or Use the Mouse Here
Access Description tab	[F1]	Options>Description or Click on Description tab
Access Purchase Information tab	[F2]	Options>Purchase Information or Click on Purchase Information tab
Access <i>Current Assignment</i> tab	[F3]	Options>Current Assignment or Click on Current Assignment tab
Access Assignment History tab	[F4]	Options>Assignment History or Click on Assignment History tab
Access Property Assigned tab	[F5]	Options>Property Assigned or Click on Property Assigned tab
Access Maintenance tab	[F6]	Options>Maintenance or Click on Maintenance tab

To Do This	Press This Key	Or Use the Mouse Here
Access Fuel tab	[F7]	Options>Fuel or Click on Fuel tab
Access Attachments tab	[F8]	Options>Attachments or Click on Attachments tab
Access Accidents tab	[F9]	Options>Accidents or Click on Accidents tab
Access Inspections tab	[F10]	Options>Inspections or Click on Inspections tab
Modify record information (where possible)	[Alt+E]	Click Edit
Add record information (where possible)	[Alt+A]	Click Add [Detail Type]
Delete record information (where possible)	[Alt+L] or [Alt+D] (<i>Attachments</i> tab only)	Click Delete [Detail Type]
Open selected attachment (<i>Attachments</i> tab)	[Alt+O]	Click Open button
Save attachment to local computer (<i>Attachments</i> tab)	[Alt+S]	Click Save As button
Refresh attachments list (<i>Attachments</i> tab)	N/A	Click Refresh button
Print vehicle-specific Repeat Repairs report	[Alt+R]	Print>Repeat Repairs
Print vehicle-specific Vehicle Details report	[Alt+V]	Print>Vehicle Details
Close vehicle record	[Alt+C]	File > Close or Click the top right red "X"

Fleet Management Configuration

The *Configuration* console is used to create and maintain lists of maintenance categories, vehicle makes and models, vendors and fuel configuration files that apply to vehicles used by the agency. The console can be accessed by pressing [Alt+C] or selecting **Configuration** in the *Options* menu, provided the user has Full Access (FA) to *Fleet Management* in *Employee Master*.

sida		Configura	ation	×
File Options				
Ma	akes & Models [F5]	Vehicle Usage	Categories [F6]	Vendors [F7]
Fuel Employee ID [F1]		Fuel File Configuration [F2]	Funding Sources [F3]	Maintenance [F4]
Employee MAHAFFEY, SHAWN A DALE, KAREN D MS LUNSFORD, CHRISSY LUNSFORD, CHRISSY PERKINS, STANLEY ADAMS, APRIL	Fuel ID 01 04 05 03 02 06		Edit Fuel ID	
				Close

Employee Fuel ID

The *Employee Fuel ID* tab is active by default when the *Configuration* console is opened. It is used to list employees utilizing agency vehicles and assign fuel IDs to those users. To return to this tab from another tab in the console, press **[F1]** or click on the *Employee Fuel ID* tab.

Makes & Models [F5]		5]	Vehicle Usage Categories [F6]		Vendors [F7]
Fuel Employee ID	[F1]	Fuel File Con	figuration [F2]	Funding Sources [F3]	Maintenance [F4]
Employee	Fuel ID		^		
AHAFFEY, SHAWN A	01				
ALE, KAREN D MS	04				
LUNSFORD, CHRISSY	05				
UNSFORD, CHRISSY	03				
ERKINS, STANLEY	02			Edit Fuel ID	
ADAMS, APRIL	06			_	
				Celete Fuel ID	
			*		

- 1. Click on the **Fuel Employee ID** tab, if it is not already active.
- 2. Click Add Fuel ID.

	Add Employee ID	×
Name Fuel ID		~
	✓ <u>D</u> K X Cance	1

- 3. Select the employee's **Name** from the drop-down menu. The contents of this menu are pulled from *Employee Master*.
- 4. Enter a unique **Fuel ID** in the field provided. The fuel ID is independent of any other ID number assigned to the employee.
- 5. Click OK.
- 6. When finished working with the *Configuration* window, click **Close**.



- ✓ To modify an existing fuel ID, highlight it and click on **Edit Fuel ID**.
- ✓ To delete a fuel ID, highlight it and click on Delete Fuel ID. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click [Yes].

Fuel File Configuration

The *Fuel File Configuration* tab is used to tell *Fleet Management* how to read data files received from fuel vendors. During configuration, the administrator must indicate the location within a line of in the file where a data field (such as Date, Time, or Odometer Reading) begins, as well as the width of the field.

IVIAKES OCIVIDAE	els [F5] Vehicle Usage C	Categories [F6]	Vendors [F7]	
Fuel Employee ID [F1]	Fuel File Configuration [F2]	Funding Sources [F3]	Maintenance [F4	
Format Name BAD FUEL FUELMAN MONTANA FUEL TEST	Edit Format			

- 1. Click on the Fuel File Configuration tab.
- 2. Click Add Format.

Add Fuel Format ×
Format Name
Date Start
Date Width
Time Start
Time Width
Car No Start
Car No Width
PIN Start
PIN Width
Odometer Start
Odometer Width
Gallons Start
Gallons Width
Cost Start
Cost Width
✓ <u>O</u> K X Cancel

- 3. Enter the Format Name.
- 4. Using the *Start* and *Width* fields for each data type, enter the data location and the field width (in characters).

For example, if the Date field starts with the first character and is 8 characters long, the value entered in *Date Start* would be 1, and the value entered in *Date Width* would be 8. Should the Time field start immediately after the date, *Time Start* would be 9 (to allow for the first eight characters being the date) and the *Time Width* could be set to 4.

- 5. Click **OK** when finished entering all information.
- 6. When finished working with the *Configuration* window, click **Close**.



- ✓ To modify an existing fuel file record, highlight it and click on **Edit Format**.
- ✓ The *Bad Fuel* format name is reserved and cannot be edited.
- ✓ To delete a fuel file record, click Delete Format. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click [Yes].

Funding Sources

Use this tab to designate sources of funding for vehicle fuelling and maintenance.

Makes & Models [F5]	Vehicle Usage C	ategories [F6]	Vendors [F7]
Fuel Employee ID [F1]	Fuel File Configuration [F2]	Funding Sources [F3]	Maintenance [F4]
Fuel Employee ID [F1] Code Description GEN GENERAL BUDGET INS INSURANCE REIMBURSEMENT FSF FEDERAL SEIZURE FUND GRT GRANT IRS INTERNAL REVENUE SERVICE OBT ORVILLE BECKFORD TRADE-INS LES LEASED VEHICLES CRI PRIVATE FUNDING	Fuel File Configuration [F2]	Funding Sources [F3]	Maintenance [F4]
	<u>D</u> elete Sou	irce	

- 1. Select the **Funding Sources** tab.
- 2. Click Add Source.

Record View
Funding Code Description Default Source
✓ <u>□</u> K X Cancel

- 3. Enter the funding **Code**.
- 4. Enter a **Description** of the funding source.
- 5. If applicable, place a check beside **Default Source**.
- 6. Click **OK**.
- 7. When finished working with the *Configuration* window, click **Close**.



- ✓ To modify an existing fund source record, highlight it and click on **Edit Source**.
- ✓ To delete a funding source, highlight it and click on Delete Source. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click [Yes].

Maintenance

Use this tab to set up a list of maintenance procedures that will be performed to agency vehicles.

Makes	s & Models (F5]	Veh	icle Usage (ate	gories [F6]	Vendors [F7]
Fuel Employee ID [F1	1]	Fuel F	File Configuration [[F2]		Funding Sources [F3]	Maintenance [F4]
Part Employee ID (P) Maintenance Category In A/C SERVICE H AIR FILTER M BATERY CHECK M BRAKE INSPECTION M DISPOSAL FEE E ENGINE DIAGNOSTIC FACTORY RECALL FRONT END ALIGNME M FUEL FILTER MILEAGE UPDATE M MILEAGE UPDATE M OIL CHANGE/LUBE M PARTS H RADIO EQUIPMENT H RUST PROOFING SHOP SUPPLIES SPEEDOMETER TEST TIRES M	nterval Type i A A A A A A A i A A A A A A A A A A A A A	15000 15000 15000 15000 15000 15000 15000 15000	Vehicle Category PATROL ADMN PATROL PATROL PATROL PATROL PATROL FLEET POOL PATROL CANINE	rcj		Edit Category	

- 1. Click on the **Maintenance** tab.
- 2. Click on Add Category.

Add Maintenance Category	×
Category Name]
Interval Type 🛛 🗸	
Vehicle Category 🗸 🗸	
✓ <u>O</u> K X Cancel	

- 3. Enter the **Category Name**.
- 4. Enter the **Interval** and choose the **Interval Type** (*Hours* or *Miles*) from the dropdown menu.
- 5. Choose the Vehicle Category from the drop-down menu.
- 6. Click OK.
- 7. When finished working with the *Configuration* window, click **Close**.



- ✓ To modify an existing maintenance category, highlight it and click on Edit Category.
- ✓ To delete a maintenance category, highlight it and click on Delete Category. Press
 [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click [Yes].

Makes & Models

Use this tab to record the vehicle makes and models utilized by the agency. These will be the options available when creating a vehicle in *Fleet Management*.

Fuel Employee ID	loyee ID [F1] Fuel File Configuration [F2]			Funding Sources [F3]	Maintenance [F4]	
Ma	akes & M	odels [F5]	Vehicle Usage Ca		ries [F6]	Vendors [F7]
Make BUICK CADILLAC CHEVROLET CHEVROLET CHRYSLER DODGE FORD FREIGHTLINER GMC HARLEY HONDA HUMMER HVUNDAI INTERNATIONAL JAMBOREE JEEP KAWASAKI KIA LINCOLN MAZDA MERCURY MITSUBISHI		Edit Make	Model CENTURY IMPALA LESABRE PARK AVENUE REGAL RIVIERA SEBRING		Edit Model	

The models shown in *Model* column depend upon the make chosen in the *Make* column.

- 1. Click on the Makes & Models tab.
- 2. Add a make to the list on the left.
 - a. Click Add Make.



- b. Enter the vehicle **Make**.
- c. Click OK.

- 3. Add a model to the list on the right.
 - a. Select a *Make* with which to associate the model from the list on the left.
 - b. Click Add Model.

	Add	Mode	el 👘	×
Model]
	<u>0</u> K	×	Cancel	

- c. Enter the vehicle **Model**.
- d. Click OK.
- 4. When finished working with the *Configuration* window, click **Close**.



- ✓ To modify an existing vehicle make, highlight it and click on **Edit Make**.
- ✓ To delete a vehicle make, highlight it and click on Delete Make. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click [Yes].
- \checkmark When a vehicle make is deleted, any associated models are also deleted.
- ✓ To modify an existing vehicle model, highlight it and click on Edit Model.
- ✓ To delete a vehicle model, highlight it and click on Delete Model. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click [Yes].

Vehicle Usage Categories

This tab allows administrators to designate the different methods by which vehicles may be utilized by the agency.

Fuel Employee I	D [F1]	Fuel File	Configuration [F2]	Funding Sources [F3]	Maintenance [F4]
N	/lakes & Model	Is [F5]	Vehicle Usage	Categories [F6]	Vendors [F7]
Category Name Co AREA IMPACT MI AI CRIME SCENE CS ENVIRON EN TRAFFIC TF FLEET POOL FP VICTIM ASSIST. VA CANINE KS S.W.A.T. SV CTS-AMERICA CA HOMELAND SECL HS CIVIL CC SMARTCOP SC CID CI PATROL PT ADMN AL BUILDING MAINT BN COURT SECURITY CT WARRANTS W TRAINING TC SPEC OPS SP CORRECTIONS CC	ode S S N R D A 9 W A A S S V C C I T D M M T I A G D V V V V V V V V V V V V V V V V V V	Edit Category			

- 1. Click on the Vehicle Usage Categories tab.
- 2. Click Add Category.

Add Vehicle Category ×
Category Name
✓ <u>O</u> K X Cancel

- 3. Enter a unique Category Name.
- 4. Enter a unique 2-character Category Code.
- 5. Click OK.
- 6. When finished working with the *Configuration* window, click **Close**.



- ✓ To modify an existing vehicle usage category, highlight it and click on Edit Category.
- ✓ To delete a vehicle usage category, highlight it and click on Delete Category. Press
 [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click [Yes].

Vendors

Use this tab to list vendors for vehicle parts or maintenance. This list is used when recording service and repair on fleet vehicle records.

Fuel Employee ID [F1]	Fuel File Configura	ation [F2]	Funding Sources [F3]	Maintenance [F4]
Makes & Moo	dels [F5]	Vehicle Usage Cate	egories [F6]	Vendors [F7]
Vendor Name ► A-1 ACCESSORIES AAMCO (ANNCO ENTERPRISES) Advance Auto Parts #9406 ADVANCED TIPES # SEDV/CE	Contact Name TIM OLIVER Advance Stores Company, Ir	nc.		
ALL STAR AUTO GLASS ALL WIRED FOR SOUND ALPHA POWER SYSTEMS	CLINT FORST CHRIS / RICH		Edit Vendor	
ANTHONY'S MOBILE DETAIL ASTRO LINCOLN MERCURY	ANTHONY Jeffery Smith		<u>A</u> dd Vendor	
AUTO EXTREME AUTO WIDE SALES & SERVICE AUTO WORKS	Jim Beem	_	x Delete Vendor	
AVALON GLASS INC. Bayside Towing	TRACY OR RANDY			
Ben's Motorcycle Repair Big "M" Tire Center, Inc.				
BIG K-MART BIG MIKES MOTOR BIKES	STORE #3975 MIKE JONES			
BIG TEN TIRES BINSWANGER GLASS		~		

- 1. Click on the **Vendors** tab.
- 2. Click Add Vendor.

_	Add Vendor	×
Vendor Name		
Contact Name		
Street 1		
Street 2		
City		
State		
Zip Code		
Country		
Phone		
Toll-Free		
Fax		
E-Mail		
	🗸 <u>D</u> K 🔀 Cancel	

- 3. Enter the Vendor Name.
- 4. Enter the **Contact Name**.

- 5. Enter the vendor's address, including **Street** (2 lines available), **City**, **State**, **Zip Code**, and **Country**.
- 6. Enter available contact information for the vendor, including **Phone** number, **Toll-Free** phone number, **Fax** number, and **E-Mail** address.
- 7. Click OK.
- 8. When finished working with the *Configuration* window, click **Close**.



- ✓ To modify an existing vendor record, highlight it and click on Edit Vendor.
- ✓ To delete a vendor record, highlight it and click on Delete Vendor. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click [Yes].

Searching Vehicle Records

Fleet Management offers many ways to locate an agency vehicle, including agency tag number, car number, confidential tag number, make, owner applied number (OAN), person assignment, style, unit assignment, vehicle number, vehicle identification number (VIN), and year.

ID Numbers

Search			
Id Numbers (1) Vehicle (2) Attribute	es (<u>3</u>) Assignment (<u>4</u>) Accidents (<u>5</u>		Adv Search
Vehicle No. Disable Formattin	Car No.	Agency Tag No.	Count: 0
			Search (F8)
Confidential Tag No.	VIN No.	OAN No.	Save Search (F9)
			Clear (F10)

The ID Numbers tab is selected by default when *Fleet Management* opens.

- 1. Enter search criteria for the needed vehicle record. Enter as much available information as is available to narrow the search results.
 - Vehicle Number
 - Car Number
 - Agency Tag Number
 - Confidential Tag Number
 - VIN (Vehicle Identification Number)
 - OAN (Owner Assigned Number)
- 2. Press [Enter] or click Search. All records matching the criteria are listed.
- 3. Double-click the desired record or select it and press [Enter] to open the record.



✓ By default, the *Vehicle Number* field requires the search criteria to comply with the configured number format (i.e. SRSO14VEH000001). To enter a vehicle number that does not comply with the format, place a check beside **Disable Formatting**.

Vehicle

Search				
Id Numbers (1)	Vehicle (2) Attributes (3) Assignment (4) Accidents (5		Adv Search
Make	Mo	del	Style	Count: 310
	~	¥	V	Search (F8)
Category	Co	or	Year	Save Search (F9)
	~	¥		Clear (F10)

- 1. Click on the **Vehicle** tab.
- 2. Enter search criteria for the needed vehicle record. Enter as much available information as is available to narrow the search results.
 - Make
 - Model
 - Style
 - Category
 - Color
 - Year
- 3. Press [Enter] or click Search. All records matching the criteria are listed.
- 4. Double-click the desired record or select it and press [Enter] to open the record.

Attributes

Search	
Id Numbers (1) Vehicle (2) Attributes (3) Assignment (4) Accidents (5)	Adv Search
Last Odometer Reading Odometer Type Weight	Count: 310
0 🗘 to 0 😴 🗸 0 🗘 to 0 😴 Marked Unmarked	Search (F8)
Purchase Date Warranty Expiration Date	Save Search (F9)
v to v to v Insured	Clear (F10)

- 1. Click on the **Attributes** tab.
- 2. Enter search criteria for the needed vehicle record. Enter as much available information as is available to narrow the search results.
 - Last Odometer Reading (Range)
 - Odometer Type
 - Weight (Range)

- Purchase Date (Range)
- Warranty Expiration Date (Range)
- Marking Status (Marked/Unmarked)
- Insurance Status (Insured/Uninsured)
- 3. Press [Enter] or click Search. All records matching the criteria are listed.
- 4. Double-click the desired record or select it and press [Enter] to open the record.

Assignment

	ch	
	Vumbers (1) Vehicle (2) Attributes (3) Assignment (4) Accidents (5)	Adv Search
ſ	rson Assigned Unit Assigned O	Count: 310
	· · · · · · · · · · · · · · · · · · ·	Search (F8)
	signment Type Assignment Date Sa	ave Search (F9)
	v to v	Clear (F10)

- 1. Click on the **Attributes** tab.
- 2. Enter search criteria for the needed vehicle record. Enter as much available information as is available to narrow the search results.
 - Person Assigned
 - Unit Assigned
 - Assignment Type
 - Assignment Date (Range)
- 3. Press [Enter] or click Search. All records matching the criteria are listed.
- 4. Double-click the desired record or select it and press [Enter] to open the record.



✓ Use *Person Assigned* or *Unit Assigned*. Using both may result in no search results.

Accidents

Search	
Id Numbers (1) Vehicle (2) Attributes (3) Assignment (4) Accidents (5)	Adv Search
Accident Date Driver	Count: 310
v to v Driver At Fault	Search (F8)
	Save Search (F9)
	Clear (F10)

- 1. Click on the Accidents tab.
- 2. Enter search criteria for the needed vehicle record. Enter as much available information as is available to narrow the search results.

- Accident Date (Range)
- Driver
- Driver At Fault
- 3. Press [Enter] or click Search. All records matching the criteria are listed.
- 4. Double-click the desired record or select it and press [Enter] to open the record.

Conducting an Advanced Search

- 1. Place a check beside **Adv Search** to use multiple search tabs for more specific results.
- 2. Enter search criteria in all necessary tabs (<u>ID Numbers</u>, <u>Vehicle</u>, <u>Attributes</u>, <u>Assignment</u>, <u>Accidents</u>).
- 3. Click on the Advanced tab to verify search criteria.
- 4. Press [Enter] or click Search. All matching records are listed.
- 5. Double-click the desired record or select it and press [Enter] to open the record.

Saving Search Criteria

Search criteria that will be used frequently can be saved to the user's employee profile so that it can be used at a later time without re-entering the search criteria. A saved search is kept until deleted by the user by whom it was created.

- 1. Perform a standard or advanced search, verifying that results can be obtained.
- 2. Click Save Search. A new line appears in the Saved Searches pane.

Saved Searche	es
Search 1	

3. Replace the default name with a brief title describing the search criteria or goal thereof.



- \checkmark Hover the mouse over a saved search folder to reveal the search criteria.
- \checkmark Double-click a saved search to run it.
- ✓ Right-click a saved search folder and select **Rename** to change the name of the saved search.
- ✓ To delete a saved search, right-click on it and select **Delete**.

Sorting Search Results

The order in which records are listed in the grid can be modified to aid in finding the desired record. The list can be sorted by *Agency Tag*, *Assigned To*, *Assignment Date*, *Car Number*, *Category*, *Color*, *Confidential Tag*, *Make*, *Model*, Owner Applied Number (*OAN*), *Odometer*, *Odometer Type*, *Style*, *Vehicle Number*, Vehicle Identification Number (*VIN*), or *Year*. Three methods are available for sorting.

- Right-click on the grid and select a column by which to sort from the context menu.
- Click on the *Options* menu and select **Sort**, then select a column by which to sort from the menu.
- Left-click on the column by which the list should be sorted.

Managing Vehicle Records

The extent to which a user can work with fleet vehicle records is dependent upon individual permissions in *Employee Master*.

Adding a Fleet Vehicle Record

- 1. Click Add Vehicle.
- 2. The Description tab is selected by default, click Edit.

Date Ent 12/10/20	ered)14 🗸	Car No													
Year	Make	~	Model	Style	~	Usage	Category v	/							
OAN		VIN	N	Agency Tag	Confidential	Tag (Color	~	Marked	Confidential	Weigh	t La	ast Odomet	er Reading	
Odomet	er Type	Date of Rea	ding												
Insured	Insuran	ice Descriptio	on												
Notes															

- a. If applicable, change the **Date Entered**.
- b. Enter a unique **Car Number** for this vehicle.

- c. Enter vehicle information, including the *Year*, *Make*, *Model*, *Style*, Owner Applied Number (*OAN*), Vehicle Identification Number (*VIN*), *Agency Tag*, *Confidential Tag*, and *Color*.
- d. Choose the Usage Category from the drop-down menu.
- e. If applicable, place a check beside **Marked**. This indicates the vehicle is marked as a law enforcement vehicle.
- f. If applicable, place a check beside **Confidential**. This limits the level of access personnel accessing the vehicle record may have. Only users with full access to confidential fleet records can modify them. Limited access can view only. No access denies access to them.
- g. Enter the vehicle's **Weight**.
- h. Choose the **Odometer Type** from the drop-down menu.
- i. If the vehicle has insurance, place a check beside **Insured** and enter the details in **Insurance Description**.
- j. Enter any **Notes** that apply to this vehicle.

- ✓ The *Last Odometer Reading* and *Date of Reading* fields are populated when an odometer reading is recorded in other tabs.
- ✓ Vehicle makes and models are set up using the <u>*Configuration*</u> console.
- 3. Click on the **Purchase Information** tab, and click **Edit**.

Purchase Date	Purchase Cost \$0.00	Funding Source PRIVATE FUNDING	~		
Vendor		Odometer at Purchas	e Warranty Length (in months)	Warranty Expiration	
Warranty Descrip	otion				
				Î	
		Total Cost of Ownership:			
		Purchase Cost: Maintenance Costs: + Operating Costs:	\$0.00 \$0.00 \$0.00		
		Total Cost:	\$0.00		
		Total Mileage:			
		Operating \$/Mile:	\$0.00		
					-

- a. Enter the Purchase Date.
- b. Enter the **Purchase Cost**.
- c. Choose the Funding Source from the drop-down menu.
- d. Choose the Vendor from the drop-down menu.
- e. Enter the Odometer at Purchase.
- f. Enter the Warranty Length (in months).
- g. Enter warranty details in Warranty Description.



- ✓ The *Warranty Expiration* field is populated based upon the purchase date and the length of the warranty.
- The operating cost per mile for the vehicle (displayed at the bottom of the tab) takes into account all maintenance and fuel purchases for the vehicle. If the vehicle was purchased used, the mileage prior to purchase is not considered.
- 4. Click on the Current Assignment tab, and click Edit.

Description [F1] Purchase Information [F2] Curren Assigned On Type	t Assignment [F3] Assignment Hi	story [F4] Property Assigned [F5]	Maintenance [F6] Fuel [F7	Attachments [F8]
12/10/2014 Not Assigned Archived Disposition Date False Disposition Reason Contact Information for Current Assign Employee ID Cal Unit 0. publics Cal	Last 0	Odometer Reading		
Office Ext. Pager	Cellular VoiceMail	VoiceMail Ext.		
Current				
_	<u>∠</u> Edit	<u>∱</u> <u>A</u> dd	🕷 Delete	🚺 <u>C</u> lose

a. If applicable, changed the assignment date in Assigned On.

b. Choose the **Type** of assignment from the drop-down menu.



c. If the assignment type chosen is *Person* or *Unit*, choose the employee or unit from the drop-down menu beside *Type*.



- ✓ Once an employee has been chosen for a *Person* assignment, the employee's contact information is pulled from *Employee Master* to be shown on the *Current Assignment* tab.
- ✓ A person or unit cannot be selected for assignment until the assignment type has been changed accordingly.
- ✓ Choosing Spare and Not Assigned prevents assignment to a specific person or unit.
- ✓ The Archived, Disposition Date, Disposition Reason, and Last Odometer Reading fields are populated when the information is entered during the record archiving process.
- 5. When finished, click **Close**. Information is automatically saved during entry.



- The Assignment History tab is read-only regardless of access level. It shows the
 history of persons and units to which the vehicle has been assigned, in addition to
 periods when the vehicle was not assigned.
- ✓ The *Property Assigned* tab is read-only regardless of access level. It shows any property that has been assigned to the vehicle, itself, through *Issued Property*.
- ✓ Vehicle records are color-coded: green indicates spare vehicles; yellow indicates unassigned vehicles; white indicates assigned vehicles.

Color	Indication
(Green)	Spare Vehicle
(Yellow)	Unassigned Vehicle
(White)	Assigned Vehicle

Adding Attachments

Within the *Attachments* tab files relating to the vehicle may be uploaded to the server for reference when making considerations.

Description [F1]	Purchase Information [F2]	Current Assignment [F3]	Assignment History [F4]	Property Assigned [F5]	Maintenance [F6]	Fuel [F7]	Attachments [F8]	• •
<u>∲</u> <u>A</u> dd	<u>O</u> pen	Save As Delete	Edit Comments	Refresh				
File Name		≜ Size D	ate Added Comr	nents				^
L								*

1. Click on the Attachments tab.



- 2. Click Add.
- 3. Choose the source for the attachment.
 - Add From File: Add a file stored in the local computer, a USB drive, or a network location.
 - Add Image From Scanner: Scan a picture or document to attach to the vehicle record.

- Add Image From Clipboard: Paste a picture copied to the local clipboard into the vehicle record.
- Add URL: Add a URL link to the vehicle record to provide more information about the vehicle.
- Add Audio File From Recorder: Record an audio statement and attach it to the vehicle record.
- Add Image From Camera: Add a picture using a live camera feed.
- 4. Click Edit Comments.

1 23	Comments	-		×
I				^
				~
	🗸 <u>о</u> к	×	Cancel	

- 5. Enter a brief description of the attachment.
- 6. Click **OK**.



- ✓ Click **Open** to view the selected attachment.
- ✓ Click Save As... to save a copy of the selected attachment to the local computer, a USB drive, or a network location.
- ✓ Click Delete to remove the selected attachment from the vehicle record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Recording Vehicle Maintenance

Vehicle maintenance may be recorded within individual vehicle records or from the main *Fleet Management* window.

Description [F1]	Pu	rchase Information [F2]	Curren	t Assignment [F3]	Assignm	nent Histo	ory [F4]	Property	y Assigned [F5]	Maint	enance [F6]	Fuel [F7]	Attachments	[F8] • •
Date ^		Date of Service Invoi	ice No.	Work	Order No.		Odd	ometer	Technician Nar	me		*		
		Sent To		v 1	Jate Sent	~	ate Ketu	rned V						
		Notes												
														^
														~
	ails													
	rd Det	Category	Qty.	Description	n	Part No		Warran	ty Unit	Cost	Cost	Invoice	No	
	Recol													
	nance													
	<u>ainte</u>													
	2													
													~	
		<											>	
		🔚 Add <u>I</u> tem		Edit I <u>t</u> em	🗶 Delete	e Ite <u>m</u>			Total Cost	:				
~														
				📝 Edit		4	• <u>A</u> dd N	laintenar	ice 🙎	De <u>l</u> ete	Maintenance	1	🚺 <u>C</u> lose	2

Within Vehicle Record

- 1. Search for, and open, the desired vehicle record.
- 2. Press [F6] or click on the Maintenance tab.
- 3. Press [Alt+A] or click on Add Maintenance.
- 4. If applicable, change the **Date of Service**.
- 5. Enter the **Invoice Number**, **Work Order Number**, and **Odometer** reading at the time of service.
- 6. Record the person or company performing the maintenance.
 - a. If the maintenance was performed in-house, choose the **Technician** Name from the drop-down menu.
 - b. Otherwise, choose the vendor to whom the vehicle was sent (Sent To) and record the Date Sent and Date Returned.
- 7. Enter any **Notes** in the field provided.
- 8. Enter maintenance items in the bottom pane.
 - a. Click Add Item.

Invoice No	
Category	~
Quantity	1
Description	
Part No.	
Warranty	
Unit Cost	

- b. Enter the **Invoice Number**.
- c. Choose the Category from the drop-down menu.
- d. If applicable, change the **Quantity**. It is set to 1 by default.
- e. Enter the **Description**, **Part Number**, **Warranty**, and **Unit Cost** information.
- f. Click **OK**.
- 9. When finished working with the vehicle record, click Close.



- ✓ To modify an existing maintenance record, highlight the date of the record in the list on the left and click Edit.
- ✓ To delete a maintenance record, highlight the date of the record in the list on the left and click **Delete Maintenance**. Press [Y] or click **Yes** to confirm the deletion. Otherwise, press [N] or click No.

Main Window

1. Press [Alt+M], or click on the *Options* menu and select Add Maintenance Record.

	venicie r	Maintenance	- - -
Select Vehicle		v	Create Maintenance Record
Invoice No:	Date of Service:	Odometer: In-h	ouse Technician Name:
Sent To:		Date Sent:	Date Returned:
Notes:			
Add Item	<u>Z</u> Edit Item	% " <u>D</u> elete Item	

- 2. Choose the method for finding the vehicle.
 - a. **Select Vehicle**: Choose the vehicle from the drop-down menu. Once chosen, the vehicle record number will appear in the field.
 - b. **Scan Barcode**: If a barcode has been applied to the vehicle, it can be scanned. The vehicle record number will appear in the field.
- 3. Click Create Maintenance Record.
- 4. Enter the **Invoice Number**, the **Date of Service**, and the **Odometer** reading at the time of service.
- 5. Record the person or company performing the maintenance.
 - a. If the maintenance was performed in-house, choose the **In-house Technician Name** from the drop-down menu.
 - b. Otherwise, choose the vendor to whom the vehicle was sent (Sent To) and record the Date Sent and Date Returned.
- 6. Enter any **Notes** in the field provided.

- 7. Enter maintenance items in the bottom pane.
 - a. Click Add Item.

Category			~	
Quantity		1		
Description				
Part No.				
Warranty				
Unit Cost				

- b. Choose the **Category** from the drop-down menu.
- c. If applicable, change the **Quantity**. It is set to 1 by default.
- d. Enter the **Description**, **Part Number**, **Warranty**, and **Unit Cost** information.
- e. Click OK.



- ✓ To print a list of repairs, click **Print**.
- 8. When finished adding information, click **OK**.



- ✓ Data is required in the *Invoice Number* field before the *Add* button is available for adding items to the record.
- \checkmark The *OK* button, to finish creating the maintenance record, is not available until all necessary information has been entered.

Recording Fuel Tickets

Multiple methods are available for recording fuel expenditures. They can be entered within the vehicle record, from the main window, or imported from a data file provided by the vendor. Determining which to use depends upon preference and the way the expenses were reported.

Within Vehicle Record

Description [F1] Purchase Information [F2] Curre	ent Assignment [F3] Assignm	nent History [F4] Property Assigned [F5	Maintenance [F6] Fuel [F7]	Attachments [F8]
Description [F1] Purchase Information [F2] Curre	Assignment [F3] Assignment [F3	<u>ent History [F4]</u> Property Assigned [F5	Maintenance [F6] Fuel [F7]	Attachments [F8]
	<u> </u> [dit	🐔 <u>A</u> dd Fuel	😰 Delete Fuel	Lose

- 1. Search for, and open, the desired vehicle record.
- 2. Press **[F7]** or click on the **Fuel** tab.
- 3. Click Add Fuel.
- 4. If applicable, change the **Date**.
- 5. Enter the **Time** of the transaction.
- 6. Enter the **Name** of the employee making the purchase.
- 7. Enter the odometer reading at the time of the transaction in **Mileage**.
- 8. Enter the amount of fuel purchased (**Gallons**) and the **Cost** in the fields provided.
- 9. When finished working with the vehicle record, click **Close**.



- ✓ To modify an existing fuel record, highlight the date of the record in the list on the left and click Edit.
- ✓ To delete a fuel record, highlight the date of the record in the list on the left and click **Delete Fuel**. Press [Y] or click **Yes** to confirm the deletion. Otherwise, press [N] or click No.

Main Window

This option provides a way to record one or more fuel expenses quickly and easily, especially when multiple vehicles are involved.

Ċa			Fuel Record	ls		
File						
Vehicle	Date	Time	Name	Mileage	Gallons	Cost
SRSO01VEH000003	12/31/2007	9:00 AM		139115	16.23	\$46.38
SRSO01VEH000003	5/18/2008	8:23 AM	NASH, JERRY LEE	134789	16.102	\$57.40
SRSO01VEH000003	7/16/2008	7:15 PM	NASH, JERRY LEE	140438	10.455	\$39.90
SRSO01VEH000003	8/17/2008	5:09 PM	NASH, JERRY LEE	140577	13.931	\$50.00
SRSO01VEH000016	8/31/2007		PERKINS, STANLEY	82982	33.458	\$82.10
SRSO01VEH000016	9/30/2007			83216	14.344	\$37.82
SRSO01VEH000016	10/31/2007			83775	28.995	\$72.92
SRSO01VEH000016	11/30/2007			83959	13.961	\$39.32
SRSO01VEH000016	6/6/2008	7:15 AM	LAWSON, CATHERINE GRANT	84119	15.254	\$56.67
SRSO01VEH000016	6/7/2008	9:59 PM	LAWSON, CATHERINE GRANT	84358	13.189	\$50.07
SRSO01VEH000016	6/8/2008	10:48 PM	LAWSON, CATHERINE GRANT	84572	10.789	\$40.96
SRSO01VEH000016	6/13/2008	9:52 PM	LAWSON, CATHERINE GRANT	84837	14.213	\$53.23
SRSO01VEH000016	6/14/2008	8:46 PM	LAWSON, CATHERINE GRANT	84996	8.503	\$31.84
SRSO01VEH000016	7/4/2008	7:05 AM	LAWSON, CATHERINE GRANT	86358	14.248	\$53.50
SRSO01VEH000016	7/18/2008	10:46 PM	LAWSON, CATHERINE GRANT	87252	9.14	\$34.14
SRSO01VEH000019	2/26/2014	9:35 AM	PERKINS, STANLEY	140100	20	\$40.00
SRSO01VEH000034	5/7/2007	6:53 PM		117477	17.01	\$47.59
SRSO01VEH000034	5/11/2007	10:06 AM		117715	18.017	\$50.73
SRSO01VEH000034	12/31/2007			118509	18.005	\$50.51
SRSO01VEH000058	5/24/2007	12:29 PM		149200	10.445	\$31.09
SRSO01VEH000059	5/8/2007	12:34 PM		87707	13.04	\$34.76
SRSO01VEH000059	5/22/2007	1:01 PM		90333	11.939	\$34.82
SRSO01VEH000059	7/23/2007			95134	22.305	\$59.93
SRSO01VEH000059	8/16/2007			98357	11.201	\$27.96
SRSO01VEH000059	11/30/2007			110992	12.101	\$34.80
				Z Edit Re	cord	Add Rec

1. Press [Alt+T] or click on the *Fuel* menu and select Enter Fuel Tickets.

2. Click Add Record.

silla	Record View	-		×
VEHICLENO	~			
Date	~			
Time				
Name				~
Odometer				
Gallons				
Cost				
1	√ <u>0</u> K	>	🕻 Ca	ancel

- 3. Select the car number from the **VEHICLENO** drop-down menu. The number can also be manually entered.
- 4. Enter the **Date** of the transaction or choose it from the drop-down calendar.
- 5. Enter the **Time** of the transaction.
- 6. Select the driver's Name from the drop-down menu.
- 7. Enter the **Odometer** reading at the time of the transaction.
- 8. Enter the amount of fuel purchased (Gallons) and the Cost in the fields provided.
- 9. Click OK.
- 10. When finished adding fuel tickets, click Close.



✓ To modify a listed fuel record, highlight it and click **Edit Record**.

Importing Fuel Tickets from a Text File

This option allows users to import fuel transactions from a text file proved by a vendor. During the import, the data in the incoming list is compared against the agency's vehicle database. Any discrepancies are brought to the user's attention.

1. Click on the Fuel menu and select Import Fuel from Text File.



- 2. Choose a **Text File Format** from the drop-down menu. These are set up in <u>*Configuration*</u>.
- 3. Click OK.
- 4. Browse to the text file location and click **Open**.
- 5. Enter the limit for which odometer entries will be considered to be in error.

The system automatically imports the files and notifies when the import is complete. If any fuel transactions cannot be matched to vehicles in the agency's vehicle database, the fuel records are marked and the user will be asked if the Bad Records should be viewed. For more information, refer to Managing Bad Fuel Records.

6. Click **Close** to return to the main *Fleet Management* window.



- ✓ The list of bad fuel records is not saved anywhere in *Fleet Management*.
 When bad records occur, it is best to view them immediately.
- ✓ The fuel import function also accommodates the Wright Express fuel file format, in addition to the Fuelman format.
- ✓ If the odometer, quantity, and cost values of a fuel record are null, the record will not be imported. Record information will be placed into the error log instead.

Managing Bad Fuel Records

During an import, if any fuel transactions cannot be matched to vehicles in the agency's vehicle database, the fuel records are marked and the user will be asked during the import process if the Bad Records should be viewed immediately. The records can, then, be modified and re-imported.

1. Click Yes when prompted to view the Bad Records.

The *Bad Fuel Records* window opens with a list of all records that did not match. This list is not saved in *Fleet Management*, so it must be printed if a log of the bad transactions is desired.

- 2. Highlight the record to be changed, and click on Edit.
- 3. Make any necessary changes.
- 4. Click **OK**.
- 5. Once all bad records have been modified as needed, click **Import** to reimport all the files.

When the import is complete, a message appears displaying the number of records that were successfully re-imported.

Exporting Vehicles to Text File

This option allows users to export a list of the agency's vehicles, including car number, year, make and model, for use by fuel vendors.

- 1. Press [Alt+E] or click on the *Fuel* menu and select Export Vehicles to Text File.
- 2. Select the location at which to save the file.
- 3. Enter a file name.
- 4. Click Save. The application will advise when the export is complete.
- 5. Click **OK**.

Viewing Fuel Import Log

Press **[Alt+L]** or click on the *Fuel* menu and select **View Fuel Import Log** to view a log of fuel import transactions. The log displays the *Import Date*, *Filename*, *Status*, and the personnel number of the user who performed the import (*Imported By*). The log can be searched, sorted, and printed. Users with full access can delete records from the log.



- ✓ The list can be sorted by *Date*, descending or by *Filename*, ascending.
- ✓ When sorting by *Filename*, the list can be searched.

Deleting Vehicle Records

Only users with Full Access (FA) to *Fleet Management* in *Employee Master* can delete a vehicle. Once a record has been deleted, it cannot be retrieved.

- 1. Search for the desired vehicle record and open it to make sure it is the record to be deleted.
- 2. Close the record.
- 3. Click Delete Vehicle.
- 4. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **No**.

Archiving/Unarchiving a Vehicle

This feature allows the agency to keep a permanent record of all vehicles retired from service, including the date the vehicle was disposed of, and the reason it was taken out of service.

Only users with full access (FA) to run *Fleet Management* in *Employee Master* can archive vehicles.

Archiving a Vehicle

- 1. Search for the desired vehicle record and open it to make sure it is the record to be archived.
- 2. Close the record.
- 3. Press [Alt+I] or click Archive Vehicle.
- 4. Press **[Y]** or click **Yes** to confirm the transaction.

а ^с ан	Record View	-		×
Disposition Date Disposition Reason	~			
	✓ <u>о</u> к		🗙 Ca	incel

- 5. Enter the **Disposition Date** and **Disposition Reason**.
- 6. Click **OK**.

If the option to *View Archived Vehicles* (in the *Options* menu) is not enabled, the record disappears from the list. When shown, archived vehicles appear with a check in the *Archived* column.

Unarchiving a Vehicle

- 1. Press [Alt+W] or click on the *Options* menu and select View Archived Vehicles to change the vehicle list to include archived vehicles. Archived vehicles appear with a checkmark in the *Archived* column.
- 2. Search for and open the desired record to confirm it is the record to be unarchived.
- 3. Close the record.
- 4. Press [Alt+I] or click Unarchive Vehicle.
- 5. Press **[Y]** or click **[Yes]** to confirm the transaction.

The check is removed from the Archived column.

Updating Odometer Readings

To update the odometer readings for all vehicles, click on the *Options* menu and select **Update Odometer Readings**. Press **[Y]** or click **Yes** to update the readings. Otherwise, press **[N]** or click **No**. The application will scan all records and update odometer readings as needed. A message will display when the update is complete. Click **OK**.

Viewing Property Assigned to a Vehicle

Property is assigned to a vehicle in *Issued Property*. However, you can a list of property assigned to a vehicle can be viewed by opening a vehicle record and pressing **[F5]** or clicking on the **Property Assigned** tab.

Viewing Vehicle Assignment History

To view a list of a vehicle's prior assignments, open the vehicle record and press **[F4]** or click on the **Assignment History** tab. A list of all prior assignments is displayed, including the *Issue Date*, the *Name/Unit* to whom it was issued, the *Return Date*, and the *Mileage* at the time of return.

Printing Vehicle Reports

Several reports are available from the *Reports* menu in *Fleet Management* to allow users to pull the information needed to make informed decisions. When a report is selected, a preview of the report is displayed for review. Click the **Print** icon when ready to print the hard copy.

Report	Description
All Vehicles Sorted By	 Assignment: Sorts vehicle records by <i>Person Assignment</i>, <i>Unit Assignment, Spare</i> and <i>Not Assigned</i>. Within the <i>Person</i> and <i>Unit</i> groups, the names or units are also sorted. Car Number: Sorts vehicle records by <i>Car Number</i> Make and Model: Sorts vehicle records by the <i>Vehicle Make</i> and <i>Vehicle Model</i> Year: Sorts vehicle records by the <i>Vehicle Year</i>
Archived Vehicles	Provides a complete listing of all archived vehicles including: Vehicle Number (with bar code), Car Number, Year, Make, Model, Category, VIN, OAN, Agency Tag, Confidential Tag, Disposition Date, and Disposition Reason

Report	Description
By Assignment	 Not Assigned: Provides a listing of all unassigned vehicles by <i>Car Number</i> Person: Provides a listing of vehicles assigned to specific persons, including the <i>Person</i> and the <i>Date Assigned</i> Persons In Unit: Provides a listing of vehicles assigned to persons in a specific unit, including: <i>Vehicle Number</i> (with bar code), <i>Car Number</i>, <i>Year</i>, <i>Make</i>, <i>Model</i>, <i>Category</i>, <i>Marked</i> status, <i>VIN</i>, <i>OAN</i>, <i>Agency Tag Number</i>, <i>Confidential Tag Number</i>, <i>Odometer</i> reading, <i>Date Assigned</i>, and employee assigned (<i>Name</i>, <i>Employee ID</i>, and <i>Unit</i>) Spare: Provides a listing of all spare vehicles by <i>Car Number</i> Unit: Provides a listing of all vehicles assigned to a unit
By Category	Provides a listing of all vehicles by category. Specific categories may be selected by marking the check boxes presented and only those are included on the report. The report can be printed for all categories by leaving the check boxes unmarked.
By Funding Source	Provides a listing of vehicles by funding source. A funding source must be selected. The report includes the following: <i>Vehicle</i> <i>Number</i> (with bar code), <i>Department</i> , <i>Car Number</i> , <i>Year</i> , <i>Make</i> , <i>Model</i> , <i>Category</i> , <i>VIN</i> , <i>OAN</i> , <i>Agency Tag</i> , <i>Confidential Tag</i> , <i>Odometer</i> reading, <i>Date Assigned</i> , and employee assigned (<i>Name</i> , <i>Employee ID</i> , and <i>Unit</i>)
By Odometer Reading	Provides a listing of vehicles with odometer readings over a specified value of hours or miles
Fuel Averages	Provides the fuel averages of each vehicle in the fleet, including Vehicle Number (with bar code), Car Number, Year, Make, Model, Average Miles traveled, Average Gallons of fuel used, Average MPG, Minimum MPG, and Maximum MPG
Fuel Records	 All Vehicles: provides all fuel records for each vehicle in the fleet for a specified date range. The report includes: <i>Vehicle Number</i> (with bar code), <i>Car Number</i>, <i>Employee</i>, <i>Date</i>, <i>Time</i>, <i>Odometer</i> reading, <i>Gallons</i> of fuel, and <i>Cost</i> of each purchase Provides the fuel records for the specified vehicle and date range
Last Odometer Reading	Provides the last odometer reading for each vehicle in the fleet
Overdue Maintenance	Provides a list of vehicles that are overdue for maintenance in the specified category (i.e. oil change)
Repeat Repairs	Provides a list of repeat repairs for the specified vehicle and date range. The report includes: <i>Car Number</i> , <i>Year</i> , <i>Make</i> , <i>Model</i> , <i>Style</i> , <i>Category</i> , <i>VIN</i> , <i>OAN</i> , <i>Purchase Date</i> , <i>Odometer at</i> <i>Purchase</i> , <i>Last Odometer Reading</i> , <i>Average MPG</i> , <i>Total Cost of</i> <i>Ownership</i> , and a breakdown of all repairs made

Report	Description
Vehicle Details	 Provides details for the specified vehicle, including the <i>Vehicle Number</i> (with bar code), <i>Car Number</i>, <i>Year</i>, <i>Make</i>, <i>Model</i>, <i>Style</i>, <i>Color</i>, <i>Weight</i>, <i>VIN</i>, <i>Agency Tag Number</i>, <i>Confidential Tag</i>, <i>Marked</i> (status), <i>Odometer</i> reading, <i>Average MPG</i>, <i>Purchase Date</i>, <i>Purchase Cost</i>, <i>Vendor</i>, <i>Total Cost of Ownership</i>, <i>Warranty Length</i>, <i>Warranty Expiration</i>, <i>Description</i>, <i>Date Assigned</i>, and employee assigned (<i>Name</i>, <i>Employee ID</i>, and <i>Unit</i>) Also lists all <i>Assigned Property</i> related to the vehicle, the <i>Assignment History</i> of the vehicle, and the <i>Maintenance History</i> Maintenance history includes each <i>Date of Service</i>, with the <i>Mileage</i>, <i>Invoice Number</i>, the name of the <i>Assigned Employee</i>, where the vehicle was sent for repair, the <i>Date Sent</i>, the <i>Date Returned</i>, and the contents of the bill, including parts, labor, procedures, and the total cost
Vehicle Accidents	Provides a list of accidents by date including the <i>Accident Date</i> , <i>Car Information</i> , <i>Driver</i> , <i>Repair Cost</i> , and whether the driver was at fault



- ✓ Users with Limited Access (LA) cannot view or print the following reports
 - o Fuel Averages
 - o Fuel Records: All Vehicles
 - o Fuel Records: By Vehicle
 - Overdue Maintenance
 - Repeat Repairs (general or within a vehicle record)
 - Vehicle Details (general or within a vehicle record)
- ✓ The *Repeat Repairs* report can be run within a vehicle record, for the specific vehicle, by pressing [Alt+R] or going to the *Print* menu and selecting **Repeat Repairs**.
- ✓ The Vehicle Details report can be run within a vehicle record, for the specific vehicle, by pressing [Alt+V] or going to the *Print* menu and selecting Vehicle Details.



Chapter 5 Property Management

Version 9.4

User Manual

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For technical support or questions concerning this manual, please call (800) 374-0101.

CTS America

180 N. Palafox Street
Pensacola, Florida 32502 *Local:* 850-429-0082 *Toll Free:* 1-877-SMARTCOP (762-7826) *Web:* www.cts-america.com *Fax:* 850-429-0522

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Overview

About Property Management

Property Management is used to track and record issued property, functioning as a complete quartermaster program that records and manages information about equipment used by an agency. The system generates a unique identifying number for each item. Purchase and warranty information, inspection, expiration, and unit or employee assignment can be recorded for each item. The property record can also contain one or more images of the property item. *Employee Master* and *Fleet Management* records are used to assign equipment to specific employees and vehicles, respectively.

Note: Property Management is also known as the Issued Property.

Software Version

The contents of this chapter are based on Property Management version 9.4.

User Assistance Tools

Help

The details here-in are general and not agency-specific. Depending on agency configuration, all information provided may not apply from one agency to another.

Training

Training is conducted on-site by the very people who use and depend on this technology (e.g., officers train officers, dispatchers train dispatchers, etc.).

Support

The CTS America Customer Support Team is available 24 hours a day, 7 days a week. Call toll-free 1-800-374-0101, option 1 for assistance. The Customer Support Team can also be contacted by e-mail for non-critical issues at support@cts-america.com.

About CTS America

Company History

Formerly known as SmartCOP Inc., CTS America was founded by an experienced software engineer. Development of the core products began in 1994 when the engineer became a sworn law enforcement officer and recognized the lack of functionality in the existing

public safety technology. This engineer determined that the only way to properly achieve functionality was through the development of a comprehensive, integrated software suite that provided real-time, critical information to first responders. The engineer also realized that the software functionality needed the input of those persons involved in the day-to-day process: deputies, troopers, investigators, dispatchers, administrators, and court clerks. Rather than dictate what an agency should utilize, CTS America listened to and created what its users demanded. The end result: a system that supports the mission of public safety agencies rather than hindering it.

Since then, the CTS America team of engineers have enhanced and expanded the core products into one of the most comprehensive, integrated product suites available. In fact, the company actively and successfully competes in all size markets, with products that scale from an agency of ten officers to thousands of officers.

Company Mission

Our mission is to provide real-time information with increased functionality to enable users to interact with the public they serve with increased safety, effectiveness and efficiency. CTS America has accomplished this by rapidly adapting and modifying complex integrated data systems to provide its customers with the most advanced, comprehensive software solutions proven to reduce crime, increase safety, and boost efficiency.

Contact CTS America

Phone toll-free: 1-800-374-0101 Fax: 850-429-0522 E-mail address: <u>support@cts-america.com</u>

Website: http://www.cts-america.com

Physical Address: 180 North Palafox Street, Pensacola, FL 32502

Using Property Management

Logging In and Out

Logging In

- 1. Open *Property Management* from the SmartCOP network share directly or using a shortcut on the local computer.
- 2. Enter a username and password.
- 3. If desired, place a check beside **Change Password** to change the password after logging in. If not desired, skip to the next step.
- 4. Press [Enter] or click Login.
 - If a new password is desired, enter the new password twice in the fields provided. The entry in both fields must match.

Logging Out

Upon clicking the "X" at the top right, clicking on **File**>**Exit**, or pressing **[Alt+X]**, the user is automatically logged out of *Property Management*.

Keyboard Shortcuts and Menu Options

Main Window

To Do This	Press This Key	Or Use the Mouse Here
Add single item	[Alt+A]>[S] or [Alt+S]	Add Item(s) button>Single Item or Options>Add Single Item
Add multiple items	[Alt+A]>[M] or [Alt+M]	Add Items(s) button>Multiple Items or Options>Add Multiple Items
View the currently selected item	[Alt+V]	View Item button or Options>View/Edit Current Item or Double-click item
Archive the currently selected item	[Alt+R]	Archive Property button or Options>Archive Current Item
Access Group Assignment console	[Alt+G]	Options>Group Assignment

To Do This	Press This Key	Or Use the Mouse Here
Access <i>Configuration</i> console	[Alt+C]	Options >Configuration
Search for records	[Spacebar] or [Alt+F]	Find (button) or Options >Find
Sort search results	[F4]	Options > Sort or Click on the column heading by which to sort
View only expired items	N/A	Options>View Only Expired Items
Show/Hide archived items	[Alt+W]	Options>View Archived Items
View Help File	[F1]	Help>Help
Close Property Management	[Alt+X]	File>Exit

Record Window

To Do This	Press This Key	Or Use the Mouse Here
Access Description tab	[F1]	Description tab or Options>Description
Access Purchase Information tab	[F2]	Purchase Information tab or Options>Purchase Information
Access Current Assignment tab	[F3]	Current Assignment tab or Options>Current Assignment
Access Assignment History tab	[F4]	Assignment History tab or Options>Assignment History
Access Inspections tab	[F5]	Inspections tab or Options>Inspections
Access Maintenance tab	[F6]	Maintenance tab or Options>Maintenance

To Do This	Press This Key	Or Use the Mouse Here
Access Attachments tab	[F7]	Attachments tab or Options>Attachments
Print an Item Label	N/A	Options>Print Item Label >[Printer]
Add information on the <i>Inspections</i> and <i>Maintenance</i> tabs	[Alt+A]	Add button
Edit property information	[Alt+E]	Edit button
Delete property information	[Alt+D]	Delete button
Close property record	[Alt+C]	Close button

Configuration

To Do This	Press This Key	Or Use the Mouse Here
Access Funding Sources tab	[F1]	Funding Sources tab or Options>Funding Sources
Access Group Assignment Categories tab	[F2]	Group Assignment Categories tab or Options>Group Assignment Categories
Access Item Categories tab	[F3]	Item Categories tab or Options>Item Categories
Access Item Conditions tab	[F4]	Item Conditions tab or Options>Item Conditions
Access Locations tab	[F5]	Locations tab or Options>Locations
Access Maintenance Categories tab	[F6]	Maintenance Categories tab or Options>Maintenance Categories
Access Vendors tab	[F7]	Vendors tab or Options>Vendors

To Do This	Press This Key	Or Use the Mouse Here
Access Label Printers tab	[F8]	Label Printers tab or Options>Label Printers
Access Archive tab	[F9]	Archive tab or Options>Archive
Access ID Types tab	[F10]	ID Types tab or Options > ID Types
Modify an existing setting	[Alt+E]	Edit button
Add a new setting	[Alt+A]	Add button
Delete setting	N/A	Delete button
Enable/Disable setting (<i>ID Types</i> tab)	N/A	Set Active/Inactive button

Configuring Property Management

Issued Property is designed to be fully customizable according to the needs of the agency.

The *Configuration* console is available by pressing [Alt+C] from the main application window or going to the *Options* menu and selecting **Configuration**. Only users with full access (FA) to run *Issued Property* granted in *Employee Master* can change configuration information.

Funding Sources

Use this tab to designate different sources of funding for the purchase of the equipment issued to officers.

L	ocatio	ns [F5]	Mainter	ance Categories [F6]	Vendors	s [F7]	L	abel Printers [F8].	Arch	nive [F9]	ID Types	[F10]
	Fundin	ng Source	es [F1]	Group Assignment	Categories	[F2]		Item Categories	[F3]	Item C	onditions	[F4]
	Code	Descript	tion		Default		^					
►	CR	CASH R	ESERVE									
	GEN	GENERA	AL BUDGE	Т	✓							
	CRI	PRIVAT	E FUNDIN	G								
	GRT	GRANT									2	
	IRS	INTERN	IAL REVEN	IUE SERVICE						<u>E</u> dit S	ource	
	TES	TEST AL	DDITION									
	DON	DONAT	IONS									
										đ	FA	
										Add S	lource	
										Addi	ource	
										•	Ċ	
										Delete	Source	
							*					

The Funding Sources tab is selected by default when the Configuration console opens.

1. Click Add Source.

Funding Source						
Source Code Source Description Default Source						
✓ <u>□</u> K X Cancel						

- 2. Enter a Source Code and Source Description.
- 3. If this will be the new default funding source, place a check beside **Default Source**.
- 4. Click OK.
- 5. When finished working with the *Configuration* console, click **Close**.



- ✓ To modify an existing funding source, highlight it in the list and click on Edit Source.
- ✓ To delete a funding source, highlight it in the list and click on Delete Source. Press
 [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Group Assignment Categories

This tab is used to compile lists of item categories that are typically assigned together. For example, a new K9 officer would need a leash, collar, muzzle, and badge for the dog. A group assignment category can be created referencing those items. At a later date, when the such an officer is hired, and equipment needs to be assigned, the *Group Assignment* console can be used to assign all needed materials to the officer.



1. Click on the Group Assignment Categories tab.

2. Click Add Category.

Group Assignment Category	×
Assignment Code Assignment Category Assignment Type]
✓ <u>□</u> K X Cancel	

- a. Enter a Code.
- b. Enter an Assignment Category name.
- c. Choose an Assignment Type from the drop-down menu.

	~
LOCATION	
PERSON	
UNIT	
VEHICLE	



- ✓ This is used to designate the type of entity that will be receiving the equipment. Property can be assigned to a *Location*, *Person*, *Unit*, or *Vehicle*.
- 3. Highlight a category.
- 4. Click Add Item.



- a. Choose an Item Category from the drop-down menu.
- b. Choose an Item Sub-Category from the drop-down menu.
- c. Click OK.



- ✓ Item categories and sub-categories are configured on the *Item Categories* tab.
- 5. When finished working with the *Configuration* console, click **Close**.



- ✓ The list of *Categories to be Included* shown depends upon the *Group Assignment Category* currently selected.
- ✓ To modify an existing category, highlight it in the list and click on **Edit Category**.
- ✓ To delete a category, highlight it in the list and click on Delete Category. Press
 [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.
- ✓ Deleting a category will also delete the list of included item categories. This does not delete the item categories, themselves.
- ✓ To modify an existing item category included in the group, highlight it in the list and click on Edit Item.
- ✓ To remove a category from the inclusion list, highlight it in the list and click on Delete Item. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No. This does not delete the item category or sub-category.

Item Categories

Use this tab to configure the various types of equipment utilized by the agency. These categories are assigned to the actual equipment records.

Locations [F5]	Mainter	nance Cate	gories [F6]	Vendors [F7]	Label Printers [F8] A	Archive [F9]	ID Types [F10
Funding Source	es [F1]	Group As	ssignment C	ategories [F2]	Item Categories [F3] Item C	onditions [F4]
Categories							
Category Nam	ne		~			Г	2
COMPUTER E	QUIPMEN	IT				Edit C	togony
KNIFE						Euit Ca	ategory
OFFICE EQUIP	MENT					4	P
OFFICE SUPPL	IES					Add C	ategory
RADIO							
SPOON							C
VEHICLE			_			Delete (Category
Sub-Categories							
Sub-Category	/ Name		~			Γ	2
> 250G HARD D	RIVE					Edit Sub-	-Category
500G HARD D	RIVE						
DESKTOP						4	P)
LAPTOP						<u>A</u> dd Sub	-Category
							•
			~			Delete Sul	o-Category
			*			a Delete Sul	• -C

- 1. Click on the **Item Categories** tab.
- 2. Click on Add Category.



- a. Enter the **Category Name**.
- b. Click OK.
- 3. Highlight a category.
- 4. Click on Add Sub-Category.

Item Sub-Category				
Sub-Category Name				
✓ <u>O</u> K X Canc	el			

- a. Enter the **Sub-Category Name**.
- b. Click OK.
- 5. When finished working with the *Configuration* console, click **Close**.

Item Conditions

This tab is used to list the various conditions in which the agency's property can be found.

Locations (ES)	Maintar	Cotor	namine (E61	Vandars (E7)	Label Drinters (E0)	Archive (E0) ID Types (E10)
Locations [F5]	iviainter	hance Cate	jones [F0]	vendors [F/]	Laber Printers [F8]	Archive [F9] ID Types [F10]
Funding Sourc	es [F1]	Group As	signment C	ategories [F2]	Item Categories	[F3] Item Conditions [F4]
Condition			~			
DAMAGED						
DESTROYED						
EXCELLENT						
GOOD						
MODERATE						Edit Condition
NEW						-
SLIGHTLY DA	MAGED					
UNREPAIRAB	LE					
						2
						Add Condition
						<u>*</u>
						Delete Condition
						Delete condition
			~			
L						

- 1. Click on the **Item Conditions** tab.
- 2. Click Add Condition.



- 3. Enter a **Condition**.
- 4. Click OK.
- 5. When finished working with the *Configuration* console, click **Close**.



- ✓ To modify an existing condition, highlight it in the list and click on **Edit Condition**.
- To delete a condition, highlight it in the list and click on Delete Condition. Press
 [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Locations

This tab is used to list the various storage locations where equipment can be acquired for issuance.

Funding Source	es [F1]	Group As	signment (Categories [F2]	Item Categories	[F3] Item C	onditions [F4]
Locations [F5]	Mainter	nance Categ	jories [F6]	Vendors [F7]	Label Printers [F8]	Archive [F9]	ID Types [F10]
Location Nam	e		^				
CTS VAULT							
GARAGE 1							
GARAGE 2							
GARAGE 3							2
PROPERTY RO	MO					Edit Lo	ocation
PROPERTY VA	ULT					_	
STORAGE ROO	M						
			ł			ة <u>A</u> dd Lo	• ocation
						Delete I	cocation
			~				

- 1. Click on the **Locations** tab.
- 2. Click Add Location.

	Location	×
Location Name Address City State Zip Code]
	✓ <u>□</u> K Cancel]

- 3. Enter the Location Name.
- 4. Enter the location's Address, City, State, and Zip Code.
- 5. Enter the location's **Phone** number.

- 6. Click **OK**.
- 7. When finished working with the *Configuration* console, click **Close**.



- ✓ To modify an existing location, highlight it in the list and click on **Edit Location**.
- ✓ To delete a location, highlight it in the list and click on Delete Location. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Maintenance Categories

This tab is used to list the general maintenance categories under which property upkeep may fall.

Funding Sources [F1]	Group Assi	ignment C	ategories [F2]	Item Categories	[F3] Item	Conditions [F4]
Locations [F5] Mainter	nance Catego	ories [F6]	Vendors [F7]	Label Printers [F8]	Archive [F9] ID Types [F10]
Category Name WEAR AND TEAR REPAIR		^				
DISCONTINUED NEW ITEM INSPECTION	N				Edit	2 Category
CLEANING					_	
	1				<u>A</u> dd	2 Category
		1			Delete	K e Category
		*				

- 1. Click on the Maintenance Categories tab.
- 2. Click Add Category.



- 3. Enter a Category Name.
- 4. Click OK.
- 5. When finished working with the *Configuration* console, click **Close**.



- ✓ To modify an existing category, highlight it in the list and click on **Edit Category**.
- ✓ To delete a category, highlight it in the list and click on Delete Category. Press
 [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Vendors

This tab is used for listing the various vendors from whom the issued equipment is purchased.

	Funding Source	es [F1]	Group As	signment (ategories [F2]	Item Categories	[F3] Item C	onditions [F4]
L	ocations [F5]	Mainter	nance Categ	jories [F6]	Vendors [F7]	Label Printers [F8]	Archive [F9]	ID Types [F10]
	Vendor Name	:		^				
	BIG 10 TIRES							
	BIG LOTS							
	DELL COMPU	TERS						
	HOME DEPOT	Г						2
	LOWES						<u>E</u> dit V	endor
	OFFICE DEPO	Т						
	PENSACOLA I	HARDWA	RE					
	WAL-MART							
	WINN DIXIE						1	<u> </u>
							<u>A</u> dd V	endor
								•
							Delete	Vendor
				¥ .				

1. Click on the **Vendors** tab.

2. Click Add Vendor.

	Vendor	×
Vendor Name		
Contact Name		
Street 1		
Street 2		
City		
State		
Zip Code		
Country		
Phone		
Toll-Free		
Fax		
E-Mail		
	✓ <u>O</u> K X Cancel	

- 3. Enter the Vendor Name.
- 4. Enter the **Contact Name**.
- 5. Enter the vendor's address information in **Street 1**, **Street 2**, **City**, **State**, **Zip Code**, and **Country**.
- 6. Enter the vendor's **Phone** number, **Toll-Free** phone number, and **Fax** number.
- 7. Enter the vendor's **E-Mail** address.
- 8. Click OK.
- 9. When finished working with the *Configuration* console, click **Close**.



- ✓ To modify an existing vendor, highlight it in the list and click on **Edit Vendor**.
- ✓ To delete a vendor, highlight it in the list and click on Delete Vendor. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Label Printers

This tab is used to configure the printers that may be used to print labels for property items. The labels printed contain a barcode and the record number.

Funding Sources [F1]	Group Assignment C	ategories [F2]	Item Catego	ries [[F3] Ite	m Co	onditions	; [F4]
Locations [F5] Mainter	nance Categories [F6]	Vendors [F7]	Label Printers	[F8]	Archive [F9]	ID Type	s [F10]
Locations [F5] Mainter Description Default Printer DeskJet or Laser Sharp	nance Categories [F6]	Vendors [F7]		^	Archive [[dit P	ID Type	s [F10]
						udd P	Printer	

- 1. Click on the **Label Printers** tab.
- 2. Click Add Printer.

	Label Printing Configuration	
Layout Options	🆼 🔝 🚍 66 % 🛛 🛈 🔍 1 🔹 👀 💋	
Configuration/Menu Item Name	μ	
Printer Name for Paper Size Option Default V Paper Size V	2	
Custom ✓ Width Height 8.50 € 11.00 €	4	
Top Left 0.25 + 0.25 +	5	
Bottom Right 0.25 😧 0.25 🗣	6	
Orientation A OPortrait Clandscape	8	
Columns Row Spacing	9	
0.00 +		
Column 2 Left		
Column 3 Left		
0.00 ÷	Page 1 of 1	
	V OK	Canc

- 3. Enter the name of the printer in the Configuration/Menu Item Name field.
- 4. Select the **Printer Name for Paper Size** from the drop-down menu. Options available depend upon the printers currently installed on the local computer.
- 5. Select the Paper Size from the drop-down list.
 - If *Custom* is selected, enter the **Width** and **Height** dimensions appropriate to the printer to be utilized, in addition to the **Top**, **Left**, **Bottom**, and **Right** margins.
- 6. Select the paper **Orientation** (*Portrait* or *Landscape*).
- 7. Enter the number of **Columns** that can be printed. Up to 4 columns many be created. When multiple columns are enabled, enter the location of the left edge of each column in the fields provided (**Column 1 Left**, **Column 2 Left**, etc.).
- 8. Enter the **Row Spacing** of the label paper.
- 9. Click **OK** when finished entering printer configuration information. The new printer is shown on the list.
- 10. When finished working with the Configuration console, click Close.



- ✓ To modify an existing printer, highlight it in the list and click on **Edit Printer**.
- ✓ To delete a printer, highlight it in the list and click on Delete Printer. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Archive

This tab is used to customize the available disposition reasons used when archiving property records.

	Funding Source	es [F1]	Group Assignment C	ategories [F2]	Item Categ	ories	[F3]	Item C	onditions	[F4]
l	ocations [F5]	Mainter	nance Categories [F6]	Vendors [F7]	Label Printer	s [F8]	Arch	nive [F9]	ID Types	[F10]
	Disposition Re	ason				^				
	BEYOND REPA	AIR								
	DAMAGED									
	DESTROYED									
	FOUND								1	
	LOST							<u>E</u> dit Dis	position	
	NOT COST EF	FECTIVE	TO REPAIR							
								ā	A	
								Add Die		
								Add Dis	position	
								Delete Di	sposition	
						~				

- 1. Click on the **Archive** tab.
- 2. Click Add Disposition.

	Maintenance Category	×
Disposition Name		
	✓ <u>O</u> K Cancel	

- 3. Enter a **Disposition Name**.
- 4. Click OK.
- 5. When finished working with the *Configuration* console, click **Close**.



- ✓ To modify an existing disposition, highlight it in the list and click on Edit Disposition.
- ✓ To delete a disposition, highlight it in the list and click on Delete Disposition. Press
 [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

ID Types

This tab is used for designating the types of IDs that may be assigned to property items.

	Funding Source	es [F1]	Group Assignment C	ategories [F2]	Item Categ	ories	[F3]	Item C	onditions [F4]
L	Locations [F5] Maintenance Categories [F6] Vendors [F7] Label Printer				s [F8]	Arch	ive [F9]	ID Types [F10]	
	ID Type					^			
	CTS-EMPLOY	EE							
	DSE								
	HARD DRIVE								
	SITE LABEL 2								1
	SRSO							Edit ID) Type
								ā	-
								T A d d tr	
								Add IL	Гуре
									È
								Set Active	e/Inactive
						~			

- 1. Click on the **ID Types** tab.
- 2. Click Add ID Type.

Add ID Type	×
ID Туре	
✓ <u>D</u> K X Cano	el
- 3. Enter an **ID Type**.
- 4. Click **OK**. The new ID type is added to the list.
- 5. When finished working with the *Configuration* console, click **Close**.



- ✓ To edit an existing ID type, highlight it and click **Edit ID Type**.
- ✓ ID types cannot be deleted, but they can be disabled. Select the ID type to be modified and click **Set Active/Inactive** to toggle between *Active* and *Inactive*.
- ✓ An inactive ID type is marked with a line through the text ($\frac{\text{ID Type}}{\text{ID Type}}$).

Searching Property Records

Use the tabs across the top of the window to search for a specific record or a group of records. Records can be located by ID Number; Property type, category, or location; Attributes; Assignment; or a combination thereof. Search criteria can also be saved for future use.

Search by ID Numbers

Use this tab to search all records by *Item Number*, *Model Number*, *Serial Number*, Owner Assigned Number (*OAN*), *Agency ID*, *Agency Created ID*, and/or *Created ID Type*.

Search			
ID Numbers (1) Property (2) Attributes (3) Assignment (4)		Adv Search
Item No. Disable Formatting Model No.	Serial No.	OAN No.	Count: 72 Search (F8)
Agency ID Agency Created ID	Created ID Type		Save Search (F9)
		~	Clear (F10)

The ID Number tab is selected by default when the application opens.

- 1. Enter the search criteria in the fields provided. Enter as much information as available to narrow the results of the search.
- 2. Press **[Enter]** or click on **Search**. All records matching the search criteria are listed.
- 3. Double-click the desired record or highlight it and click on View Item.



✓ When the *Item Number* field is selected, it pre-populates with the first 8 or 9 characters depending on the agency prefix (i.e. SRSO14PRT) allowing the user to enter just the last 6 characters for an item number created in the current year. The number in the prefix can be changed to reflect previous years, if needed.

✓ To enter an *Item Number* that does not comply with the current number format, place a check beside **Disable Formatting**.

Search by Property

Use this tab to search all records by *Item Category*, *Sub-Category*, *Brand*, *Description*, and/or *Inventory Location*.

Search							
ID Numbers (1)	Property (2) Attri	utes (3)	Assignment (4)			Adv	Search
Item Category		Sul	-Category		Brand	Count	72
				~		Searc	ch (F8)
Description		Inv	entory Location			Save Se	arch (F9)
				~		Clea	r (F10)

- 1. Click on the **Property** tab.
- 2. Enter the search criteria in the fields provided. Enter as much information as available to narrow the results of the search.
- 3. Press **[Enter]** or click on **Search**. All records matching the search criteria are listed.
- 4. Double-click the desired record or highlight it and click on View Item.

Search by Attributes

Use this tab to search all records by *Purchase Date* (range), *Inventory Date* (range), *Lifetime Expiration Date* (range), *Warranty Expiration Date* (range), and *Capital Asset* (check).

Search					
ID Numbers (1) Property (2)	Attributes (3) As	signment (4)			Adv Search
Purchase Date	Invent	ory Date			Count: 72
v to	¥	v to	~	Capital Asset	Search (F8)
Lifetime Expiration Date	Warra	nty Expiration Date			Save Search (F9)
v to	¥	✓ to	¥		Clear (F10)

- 1. Click on the **Attributes** tab.
- 2. Enter the search criteria in the fields provided. Enter as much information as available to narrow the results of the search.
- 3. Press **[Enter]** or click on **Search**. All records matching the search criteria are listed.
- 4. Double-click the desired record or highlight it and click on **View Item**.

Search by Assignment

Use this tab to search all records by *Person Assigned*, *Unit Assigned*, *Vehicle Assigned*, *Location Assigned*, *Assignment Type* and/or *Issued Date* (range).

Search			
ID Numbers (1) Property (2	2) Attributes (3) Assignment (4)		Adv Search
Person Assigned	Unit Assigned	Vehicle Assigned	Count: 72
	¥	· · ·	Search (F8)
Location Assigned	Assignment Type	Issued Date	Save Search (F9)
	¥	✓ v to ✓	Clear (F10)

- 1. Click on the **Assignment** tab.
- 2. Enter the search criteria in the fields provided. Enter as much information as available to narrow the results of the search.
- 3. Press **[Enter]** or click on **Search**. All records matching the search criteria are listed.
- 4. Double-click the desired record or highlight it and click on View Item.



 \checkmark It is best to use only one of the four *Assigned* fields on this tab, as individual property items can be assigned to only one of the of the available types of entity (person, unit, vehicle, or location).

Conducting an Advanced Search

- 1. Place a check beside **Adv Search** to us multiple search tabs for more specific results.
- 2. Enter search criteria in all necessary tabs (<u>ID Numbers</u>, <u>Property</u>, <u>Attributes</u>, <u>Assignment</u>).
- 3. Click on the **Advanced** tab to verify search criteria.
- 4. Press [Enter] or click Search. All matching records are listed.
- 5. Double-click the desired record or select it and press [Enter] to open the record.

Saving Search Criteria

Search criteria that will be used frequently can be saved to the user's employee profile so that it can be used at a later time without re-entering the search criteria. A saved search is kept until deleted by the user by whom it was created.

- 1. Perform a standard or advanced search, verifying that results can be obtained.
- 2. Click Save Search. A new line appears in the Saved Searches pane.

Saved Searches				
🔍 Search 1				

3. Replace the default name with a brief title describing the search criteria or goal thereof.



- \checkmark Hover the mouse over a saved search folder to reveal the search criteria.
- \checkmark Double-click a saved search to run it.
- ✓ Right-click a saved search folder and select **Rename** to change the name of the saved search.
- ✓ To delete a saved search, right-click on it and select **Delete**.

Sorting Search Results

The order in which records are listed in the grid can be modified to aid in finding the desired record. The list can be sorted by *Assignment Type*, *Brand*, *Issue Date*, *Item Number*, *Lifetime Expiration Date*, *Model Number*, Owner Applied Number (*OAN*), *Serial Number*, or *Agency ID*. Three methods are available for sorting.

- Right-click on the grid and select a column by which to sort from the context menu.
- Click on the *Options* menu and select **Sort**, then select a column by which to sort from the menu.
- Left-click on the column by which the list should be sorted.

Managing Property Records

The property record list shows details including the *Item Number*, *Brand*, *Description*, *Model Number*, *Serial Number*, Owner Applied Number (*OAN*), *Agency ID Number*, *Lifetime Expiration Date*, and *Assignment Type* for each item. Sort, search, and filter options are available from the *Options* menu.

Only users with full access (FA) to run *Issued Property* granted in *Employee Master* can view purchase information contained in property records.

Property Record Color-Coding

Property records shown in the list are color-coded to indicate the current state of the property. To view the legend, click the *Help* menu and select **Legend**.

Color		Indication		
	(Yellow)	Item is in-stock		
	(Red)	Item's lifetime has expired		
	(White)	Item has been assigned to a location, unit, or employee		
	(Gray)	Item has been archived		

Adding a Single Property Item

1. Click Add Item(s) and select Single Item or press [Alt+S].

		Item #: SRSO14PRTS00015	- 🗆 🗙
Fil	e Options		
D	scription [F1]	Purchase Information [F2] Current Assignment [F3] Assignment H	listory [F4] Inspections [F5] Maintenance [F6 + +
	12/16/2014 Date Entered	Agency ID Item Category St	v ub-Category
	Description	Brand Model Numbe	er Serial Number
cription	Notes	Inventory Date Inventory Location	~ ~
Item Desc	Agency IDs Date	ID Type	^
			~
	ID: Comment:		
			~
	* <u>A</u> dd	Cancel X Delete	
			Edit

The *Description* tab is selected by default and the current date is pre-populated in the *Date Entered* field.

- 2. Click Edit.
- 3. If necessary, change the **Date Entered**.
- 4. Enter the Agency ID in the field provided.
- 5. Choose the Item Category and Sub-Category from the drop-down menus.
- 6. Enter the **Description**, **Brand**, **Model Number**, **Serial Number**, and Owner Assigned Number (**OAN**) in the fields provided.
- 7. Enter the Inventory Date or select the date using the drop-down calendar.
- 8. Choose the Inventory Location from the drop-down menu.
- 9. Enter any applicable Notes in the field provided.
- 10. Use the Agency IDs section to add agency-specific identification numbers.
 - a. Click Add.

	What typ	e of ID	do yo	u want	to add?	>
<u>S</u> earch	Characters					
De:	cription					^
ET:	6-EMPLOYEE					
HA	RD DRIVE					
SB	50					
						~
				OK	Y Car	- leo
			×	DK	👝 Car	CCI

- b. Choose the type of ID to be created and click **OK**.
- c. Enter the **ID** number in the field below the list.

Date	ID	Туре	
12/16/2014 12:1	1:44 PM	CTS-EMPLOYEE	
<u>I</u> D:			
Comment:			
🕈 🚰	🔕 Ca <u>n</u> cel 🗱 <u>D</u> elete		



✓ To modify an existing agency ID, highlight it in the list and make any necessary changes to the ID number below the list.

- ✓ To delete an agency ID, highlight it in the list and click Delete. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.
- 11. Click on the Purchase Information tab or press [F2].

	Item #: SRSO14PRTS00016 – 🗖 🗙
File De	e Options scription [F1] Purchase Information [F2] Current Assignment [F3] Assignment History [F4] Inspections [F5] Maintenance [F6] + +
	v S0.00 GENERAL BUDGET v Capital Asset Purchase Date Vendor Name Cost Funding Source 0 v Lifetime Length (months) Lifetime Expiration
.hase Information	Lifetime Description
Purc	
	Warranty Description
	Edit Close

The Funding Source field automatically selects the configured default.

- 12. Click Edit.
- 13. Enter the **Purchase Date** or select it from the drop-down calendar.
- 14. Choose the Vendor Name from the drop-down menu.
- 15. Enter the **Cost** of the item.
- 16. Choose the Funding Source for the purchase, if different from the default.
- 17. If applicable, place a check beside **Capital Asset**.
- 18. Enter the anticipated **Lifetime Length** (in months) for the item. The *Lifetime Expiration* field automatically calculates the date based on the *Purchase Date* and the *Lifetime Length*.
- 19. Enter applicable lifetime details in Lifetime Description.
- 20. Enter the **Warranty Length** (in months) for the item. The *Warranty Expiration* field automatically calculates the date based on the *Purchase Date* and the *Warranty Length*.

- 21. Enter applicable warranty details in Warranty Description.
- 22. Click on the Current Assignment tab or press [F3].

	Item #: SRSO14	4PRTS00016	- 🗆 🗙
File Options Description [F1] Purchase Info	rmation [F2] Current Assignment [F3]	Assignment History [F4] Inspecti	ions [F5] Maintenance [F6
Assigned By Contact Information	In truon (F2) Current Assignment (F3)	Assignment History [H] inspection	
			🖉 Edit 🚺 🚺 Close

The *Issue Date* defaults to the current date and the *Assignment Type* defaults to *Stock*, indicating no current assignment.

- 23. Click Edit.
- 24. If necessary, change the **Issue Date** manually or using the drop-down calendar.
- 25. If necessary, change the **Assignment Type** and select the location, vehicle, person, or unit receiving the item from the *Assigned To* drop-down menu.
- 26. Select the **Issue Condition** from the drop-down menu.
- 27. Choose the approving supervisor from the Approved By drop-down menu.
- 28. When finished, click Close.



- ✓ Only users with full access (FA) to run Issued Property granted in *Employee Master* can enter or view purchase information.
- ✓ The *Archived* check box, *Disposition Date* and *Disposition Reason* will only be populated when an item is taken out of commission.

✓ Once property is assigned to an officer, the *Assigned By* field is populated with the assigning party's user name and contact information for the assigned officer will appear.

Adding Multiple Property Items

This function can be used when more than one of a single item has been purchased. The process assumes that all items to be entered have the same details.

- 1. Click Add Item(s) and select Multiple Items or press [Alt+M].
- 2. Follow the process outlined for <u>Adding a Single Property Item</u>, with one exception.
 - On the *Current Assignment* tab, only change the **Issue Date**, if such is necessary. Leave all other fields as they are.
- 3. When finished entering item details, click Close.



- 4. Enter the Total Number of Items to add.
- 5. Click OK.

The designated number of property items are created, including the original.

Adding Attachments

Within the *Attachments* tab files relating to the vehicle may be uploaded to the server for reference when making considerations.

De	scription [F1]	Purchase Information [F2]	Current Assignment [F3]	Assignment History [F4]	Inspections [F5]	Maintenance [F6]	Attachments [F7]
	₽ <u>A</u> dd	<u>Open</u>	<u>S</u> ave As De	elete <u>E</u> dit Comments	<u>R</u> efresh		
	File Nam	e	≜ Size	Date Added Co	omments		^
/iew							
ents \							
achm							
Att							
							*
							Lose

1. Click on the Attachments tab.



- 2. Choose the source for the attachment.
 - Add From File: Add a file stored in the local computer, a USB drive, or a network location.
 - Add Image From Scanner: Scan a picture or document to attach to the vehicle record.
 - Add Image From Clipboard: Paste a picture copied to the local clipboard into the vehicle record.

- Add URL: Add a URL link to the vehicle record to provide more information about the vehicle.
- Add Audio File From Recorder: Record an audio statement and attach it to the vehicle record.
- Add Image From Camera: Add a picture using a live camera feed.
- 3. Click Edit Comments.

5 2 3	Comments	-		×
1				^
				_
	и пк	×	Cancel	
		~	Janoor	

- 4. Enter a brief description of the attachment.
- 5. Click OK.



- ✓ Click **Open** to view the selected attachment.
- ✓ Click Save As... to save a copy of the selected attachment to the local computer, a USB drive, or a network location.
- ✓ Click Delete to remove the selected attachment from the vehicle record. Press [Y] or click Yes to confirm the deletion. Otherwise, press [N] or click No.

Modifying Property Records

- 1. Search for, and open, the record to be modified.
- 2. Use the tabs at the top of the screen to move to different parts of the record. Click **Edit** and make changes as needed on each tab.
- 3. When finished, click **Close**.



✓ Users must have full access to issue property in *Issued Property* granted in *Employee Master* to assign property to a vehicle, station, person, or unit.

Recording Inspections

Only users with full access to run *Issued Property* granted in *Employee Master* can record inspections.

- 1. Search for, and open, the record to be modified.
- 2. Click on the **Inspections** tab.

Description [F1]	Purc	hase Information [F2]	Current Assignment [F3]	Assignment History [F4]	Inspections [F5]	Maintenance [F6 + +
DATE ^		Date Ins	pector	~		
		Comments				
	spection Details					
	Ē					
	,					
				Edit	x <u>D</u> elete	Lose

- 3. Click **Edit**.
- 4. If needed, change the **Date**. When a new inspection record is created, the current date is automatically inserted.
- 5. Choose the **Inspector** from the drop-down menu.

- 6. Enter any applicable **Comments** relating to the inspection.
- 7. When finished, click **Close**.

Recording Maintenance

- 1. Search for, and open, the record to be modified.
- 2. Click on the Maintenance tab.

Purchase Information [F2] Current Assignment [F3] A	Assignment History [F4]	Inspections [F5] Maint	enance [F6]	Attachments [] • •
DATE Category Name		~		
Description	~			
Sent To	Date Sent	DateReturned	Cost	_
enance Det				
Maint				
	🖉 <u>E</u> dit	Add	😰 <u>D</u> elete	Close

- 3. Click Add.
- 4. Choose the maintenance **Category** and the **Name** of the person currently issued the property from the drop-down menus.
- 5. Enter a **Description** of the maintenance.
- 6. Choose the vendor to whom the property was sent (**Sent To**) from the drop-down menu.
- 7. Enter the **Date Sent** and the **Date Returned**.
- 8. Enter the **Cost** of the maintenance.
- 9. When finished, click Close.

Archiving and Un-archiving Property Records

Archiving Property Records

1. Search for, and highlight, the record to be archived.

- 2. Click Archive Property.
- 3. Press **[Y]** or click **Yes** to archive the record. Otherwise, press **[N]** or click **No**.

	Record View	×
Disposition Date Disposition Reason	× ×	~
	✓ <u>Ω</u> K	Cancel

- 4. Enter the **Disposition Date** or select it from the drop-down calendar.
- 5. Choose the **Disposition Reason** and **Item Condition** from the drop-down menus.
- 6. Click OK.



- ✓ Only users with full access to archive in *Issued Property* granted in *Employee Master* can archive property records.
- ✓ To view archived items, click on the *Options* menu, and select View Archived Items. Archived items appear with a check mark in the *Archived* column.
- \checkmark Archived items must be viewable to be searched.

Un-archiving Property Records

- 1. Click on the *Options* menu and select **View Archived Items** so archived items are visible in search results.
- 2. Search for, and highlight, the record to be un-archived.
- 3. Click Unarchive Property.
- 4. Press **[Y]** or click **Yes** to un-archive the record. Otherwise, press **[N]** or click **No**.

The record is un-archived and disposition information is removed.

Assigning Groups of Items

This feature allows agencies to easily assign standard equipment sets to a person, location, unit, or vehicle. The equipment sets are configured on the *Configuration* console's *Group Assignment Categories* tab.

1. On the main *Issued Property* window, click on the *Options* menu and select **Group** Assignment.

]		G	iroup Assignm	ent			×
F	le Options							
	Assignment (Category:		✓ 📑	<u>G</u> et Items			
	 All Un 	assigned Items 🤇	By Item Category				Y	
	Date Entered	Brand	Model Number	Description		Serial Number	OAN	^
Þ	2/8/2010	RECORD	68759	TEST				
	2/8/2010	JOLT	5050	TASER				
	5/11/2010	WOMBAT	458583	850Hz PROCESS	OR			
	5/11/2010	WOMBAT	458583	850Hz PROCESS	OR			
	4/29/2011							
	4/29/2011							
	10/3/2013	DELCO		12 volt				
	10/3/2013							
	10/3/2013	DELCO		12 volt				
								· ·
		A		1				
		Add To List	Delete From List		Assignment T	ype:	~	
l It	ems To Assig	n:			-Assigned To			
					a u			
					Name			
					Employe	e ID	~	
					Scan Bar	code		
Ľ								
						Δαςί	an 🕮 C	lose
							9 i p <u>c</u>	

- 2. Choose an Assignment Category from the drop-down menu.
- 3. Click **Get Items**. The items configured for the assignment appear in the *Items To Assign* pane.
- 4. If any other items need to be added to the pre-defined list, highlight it in the middle panel and click on **Add to List**.
- 5. Select the *Location*, *Vehicle*, *Person*, or *Unit* receiving the property from the dropdown list.
- 6. Click Assign.
- 7. Press **[Y]** or click **Yes** to print an assignment summary. Otherwise, press **[N]** or click **No**.
- 8. Review the print preview and click the **Print** icon when ready.
- 9. After printing the report, click **Close**.

10. Click Close again to return to the main Issued Property window.



- ✓ Only users with full access (FA) to issue property in *Issued Property* granted in *Employee Master* can assign groups.
- ✓ The assignment type is automatically selected based upon the configuration of the group assignment.

Viewing Archived Property Records

By default, archived property records are hidden, allowing users to view existing property items without any unnecessary clutter. However, archived records can be shown, when needed, and hidden again through the same process.

- 1. Click on the *Options* menu and select **View Archived Items**. If there are currently search results, the list will refresh to show any archived property records that match the current search criteria.
- 2. When finished viewing archived items, return to the *Options* menu and select **View Archived Items**. (Notice the check next to it.) Archived property records disappear from the list.

Viewing Only Expired Items

By default, items with an expired lifetime are listed alongside other items in the list. However, the list can be modified to show *only* the items with an expired lifetime.

- 1. Click on the *Options* menu and select **View Only Expired Items**. If there are currently search results, the list will refresh to show only expired items matching the current search criteria.
- 2. When finished reviewing expired items, return to the *Options* menu and select **View Only Expired Items**. (Notice the check next to it.) Search results return to showing all records matching the search criteria

Viewing Assignment History

The assignment history can be used to view who has been in possession of a piece of property, who made the assignment, how long the assignment lasted, and the condition of the property before and after the employee's possession of the item.

- 1. Search for, and open, the desired property record.
- 2. Click on the **Assignment History** tab. The full assignment history is available at a glance. It can be viewed, but not modified.
- 3. When finished reviewing the assignment history, close the property record.



✓ The Assigned By column contains the login ID of the user who assigned the property item.

Printing Property Reports

Several reports are available from the *Reports* menu in *Issued Property* to allow users to pull the information needed to make informed decisions. When a report is selected, a preview of the report is displayed for review. Click the **Print** icon when ready to print the hard copy.

Report	Description
All Items	Lists all active items including the Property Number (with bar
	code), Serial Number, Owner Applied Number (OAN), Brand,
	Model Number, Description, Inventory Date, Inventory Location,
	Vendor, Purchase Date, Purchase Cost, Lifetime Expiration date,
	Issue Date, Agency ID, and the assigned person, unit, vehicle, or
	location (Assigned To)
All Labels by Item	Prints labels for all items with bar codes and the corresponding
Number	owner applied number (OAN) for each, ordered by Item Number
All Labels by Sort Order	Lists all items with bar codes and the corresponding owner
	applied number (OAN) for each, ordered according to the current
	sort order
All Locations	Lists all locations used to store property including the address and
	contact information for each location
All Vendors	Lists all vendors used by the agency including the vendor Name,
	Address, Contact Information, and Contact Person
Archived Items	Lists all archived items including the Property Number (with bar
	code), Serial Number, Owner Applied Number (OAN), Brand,
	Model Number, Capital Asset status (check), Description,
	Inventory Date, Inventory Location, Vendor, Purchase Date,
	Lifetime Expiration date, Disposition Date and Disposition
	Reason

Report	Description
By Assignment	 Lists all items according to the specified assignment type including the <i>Property Number</i> (with bar code), <i>Category, Serial Number</i>, Owner Applied Number (<i>OAN</i>), <i>Brand, Model Number</i>, <i>Description, Lifetime Expiration</i> date, <i>Inventory Date, Inventory Location, Issue Date, Agency ID</i>, and the assigned person, unit, vehicle, or location (<i>Assigned To</i>) Location: Lists all items assigned to the specified inventory location Not Assigned: Lists all items that are not currently assigned Person: Lists all items assigned to the specified person Persons in a Unit: Lists all items assigned to persons in the specified unit Unit: Lists all items assigned to the specified unit Vehicle: Lists all items assigned to the specified unit
By Brand	Lists all items according to the specified brand including the <i>Property Number</i> (with bar code), <i>Category, Serial Number</i> , Owner Applied Number (<i>OAN</i>), <i>Brand, Model Number</i> , <i>Description, Lifetime Expiration</i> date, <i>Inventory Date, Inventory</i> <i>Location, Issue Date, Agency ID</i> , and the assigned person, unit, vehicle, or location (<i>Assigned To</i>)
By Category	Lists all items according to the specified category (and, if desired, sub-category) including the <i>Property Number</i> (with bar code), <i>Category, Serial Number</i> , Owner Applied Number (OAN), Brand, Model Number, Description, Lifetime Expiration date, Inventory Date, Inventory Location, Issue Date, Agency ID, and the assigned person, unit, vehicle, or location (Assigned To)
By Funding Source	Lists all items according to the specified funding source including the <i>Property Number</i> (with bar code), <i>Category, Serial Number</i> , Owner Applied Number (<i>OAN</i>), <i>Brand, Model Number</i> , <i>Description, Lifetime Expiration</i> date, <i>Inventory Date, Inventory</i> <i>Location, Issue Date, Agency ID</i> , and the assigned person, unit, vehicle, or location (<i>Assigned To</i>)
By Lifetime Expiration Date	Lists all items according to the specified lifetime expiration date range including the <i>Property Number</i> (with bar code), <i>Category</i> , <i>Serial Number</i> , Owner Applied Number (OAN), Brand, Model Number, Description, Lifetime Expiration date, <i>Inventory Date</i> , <i>Inventory Location</i> , <i>Issue Date</i> , <i>Agency ID</i> , and the assigned person, unit, vehicle, or location (Assigned To)
By Purchase Date	Lists all items according to the specified purchase date range including the <i>Property Number</i> (with bar code), <i>Category, Serial</i> <i>Number</i> , Owner Applied Number (OAN), Brand, Model Number, <i>Description, Lifetime Expiration</i> date, <i>Inventory Date, Inventory</i> <i>Location, Issue Date, Agency ID</i> , and the assigned person, unit, vehicle, or location (Assigned To)

Report	Description
By Vendor	Lists all items according to the specified vendor including the
	Property Number (with bar code), Category, Serial Number,
	Owner Applied Number (OAN), Brand, Model Number,
	Description, Lifetime Expiration date, Inventory Date, Inventory
	Location, Issue Date, Agency ID, and the assigned person, unit,
	vehicle, or location (Assigned To)
By Warranty Expiration	Lists all items according to the specified warranty expiration date
Date	range including the <i>Property Number</i> (with bar code), <i>Category</i> ,
	Serial Number, Owner Applied Number (OAN), Brand, Model
	Number, Description, Lifetime Expiration date, Inventory Date,
	Inventory Location, Issue Date, Agency ID, and the assigned
	person, unit, vehicle, or location (Assigned To)
Capital Assets	Lists all items specified as capital assets including the <i>Property</i>
	Number (with bar code), Category, Serial Number, Owner
	Applied Number (OAN), Brand, Model Number, Description,
	Vendor, Purchase Date, Purchase Cost, Warranty Length,
	Warranty Expiration Date, Warranty Description, Lifetime
	Length, Lifetime Expiration Date, Lifetime Description, Inventory
	Date, Inventory Location, Issue Date, Issue Condition, and the
	assigned person, unit, venicle, or location (Assigned 10)
Inspections	Lists all inspections for the specified item category on the
	Specified date including the <i>Property Number</i> (with bar code),
	Description, Brana, Model Number, Serial Number, Serial
	(abook) Inventory Data Inventory Location (at) Last Inspection
	(Check), Inventory Date, Inventory Location (al), Last Inspection Data Inspection Comments Issue Data Issue Condition and the
	assigned person unit vehicle or location (Assigned To)
Item Details	Lists the details of the specified property item including the
Item Details	Property Number (with bar code) Category Description Brand
	Model Number Serial Number Owner Applied Number (OAN)
	Vendor Purchase Date Purchase Cost Capital Asset status
	(check) Funding Source Inventory Date Inventory Location (at)
	Warranty Length Warranty Expiration Warranty Description
	Lifetime Length Lifetime Expiration Lifetime Description,
	Date Issue Condition and the assigned person unit vehicle or
	location (Assigned To)
Labels By Date Entered	Prints labels for all items within the specified date range with bar
	codes and the corresponding owner applied number (<i>OAN</i>) for
	each, ordered by the date entered
Labels By Item Number	Prints labels for all items within the specified property number
Range	range with bar codes and the corresponding owner applied number
0	(OAN) for each, ordered by the property number



- ✓ Users with Limited Access (LA) to run *Issued Property* granted in *Employee Master* cannot view or print the following reports
 - By Funding Source
 - By Purchase Date
 - By Warranty Expiration Date
 - o Capital Assets
 - o Inspections
 - o Item Details
- \checkmark Individual item labels can be printed from within property records.



Chapter 6

Training

Version 1.0

User Manual

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For technical support or questions concerning this manual, please call (800) 374-0101.

CTS America

180 N. Palafox Street
Pensacola, Florida 32502 *Local:* 850-429-0082 *Toll Free:* 1-877-SMARTCOP (762-7826) *Web:* www.cts-america.com *Fax:* 850-429-0522

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Creating a Group	
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Overview

About Training

Training was developed to provide an advanced interface for creating, administering, and tracking officer training regimens. The application is designed to allow customization of classes, syllabi, and class sizes.

Software Version

The contents of this manual are based on Training version 1.0.

User Assistance Tools

Help

The details here-in are general and not agency-specific. Depending on agency configuration, all information provided may not apply from one agency to another.

Training

Training is conducted on-site by the very people who use and depend on this technology (e.g., officers train officers, dispatchers train dispatchers, etc.).

Support

The CTS America Customer Support Team is available 24 hours a day, 7 days a week. Call toll-free 1-800-374-0101, option 1 for assistance. The Customer Support Team can also be contacted by e-mail for non-critical issues at support@cts-america.com.

About CTS America

Company History

Formerly known as SmartCOP Inc., CTS America was founded by an experienced software engineer. Development of the core products began in 1994 when the engineer became a sworn law enforcement officer and recognized the lack of functionality in the existing public safety technology. This engineer determined that the only way to properly achieve functionality was through the development of a comprehensive, integrated software suite that provided real-time, critical information to first responders. The engineer also realized that the software functionality needed the input of those persons involved in the day-to-day process: deputies, troopers, investigators, dispatchers, administrators, and court clerks. Rather than dictate what an agency should utilize, CTS America listened to and created

what its users demanded. The end result: a system that supports the mission of public safety agencies rather than hindering it.

Since then, the CTS America team of engineers have enhanced and expanded the core products into one of the most comprehensive, integrated product suites available. In fact, the company actively and successfully competes in all size markets, with products that scale from an agency of ten officers to thousands of officers.

Company Mission

Our mission is to provide real-time information with increased functionality to enable users to interact with the public they serve with increased safety, effectiveness and efficiency. CTS America has accomplished this by rapidly adapting and modifying complex integrated data systems to provide its customers with the most advanced, comprehensive software solutions proven to reduce crime, increase safety, and boost efficiency.

Contact CTS America

Phone toll-free: 1-800-374-0101

Fax: 850-429-0522

E-mail address: support@cts-america.com

Website: http://www.cts-america.com

Physical Address: 180 North Palafox Street, Pensacola, FL 32502

Using Training

Permissions

Permissions for this application may be found in *Employee Master* in the *Training* section of the *Admin* tab in *User Access*.

Create Class

Y	The user is able to create new classes within a lesson plan.
Ν	The user is unable to create new classes within a lesson plan. Class information may still be viewed, however.

Create Course

Y	The user is able to create new courses in SmartAdmin.		
Ν	The user is unable to create new courses. Course information may still be viewed, however.		

Delete Class

Y	The user is able to delete classes within a lesson plan.
Ν	The user is unable to delete classes within a lesson plan.

Delete Course

Y	The user is able to delete courses in SmartAdmin.
Ν	The user is unable to delete courses.

Edit Settings

Y	The user is able to edit SmartAdmin settings.
Ν	The user is unable to change settings in <i>SmartAdmin</i> . They may only be viewed.

Run

FA	The user is able to access <i>SmartAdmin</i> and edit records not specifically denied by other permissions.
LA	The user is able to access <i>SmartAdmin</i> . However, the user can only view records.
XX	The user is unable to access SmartAdmin.

Search and View Users

Y	The user is able to create new classes within a lesson plan.	
N	The user is unable to create new classes within a lesson plan. C may still be viewed, however.	Class information

Logging In

å	SmartAdmin	- 🗆 🗙
	Login	
	Login	
	Username	
	Password	
	Login	

When *Training* opens, the application prompts for a username and password. Access to *Training* requires permission in *Employee Master*. By default, up to five login attempts are permitted before the account is temporarily locked.

- 1. Enter the **Username** and **Password**.
- 2. Press [Enter] or click Login.

Dashboard



The *Dashboard* tab displays any classes the current user is scheduled to teach or attend. It also allows the user to go directly to that class record to modify or download materials, depending upon permission levels. It is blank, if no information is available.

Profile

đ			SmartAdmin			- 🗆 🗙
DASHBOAF	D PROFILE	USERS	TRAINING	REPORTS	SETTINGS	Logout
General Information Train	ning Record Attachments					
First Name	Middle Name	Last Name	Suffix			
SHAWN	ANTHONY	MAHAFFEY				
Rank	Division	Unit Position	Unit Role			
CHIEF						
Primary Firearm						
•						

General Information

General Information	Training Record Attachment	s		
First Name SHAWN	Middle Name ANTHONY	Last Name MAHAFFEY	Suffix	
Rank CHIEF	Division	Unit Position	Unit Role	
Primary Firearm				

Most information on the *General Information* tab is pulled from *Employee Master*, and is read-only. The **Primary Firearm** may be selected from the drop-down menu after the user has taken at least one firearm course. The firearms used on the exam are associated with the profile.

Training Record

General Information Training Record Atta	achments					
Course History	Course History					
Class Test	t Passed					
ARM-5839 - BASIC ARMORY Exar	m 🗸					
ARM-23923 - ADVANCED ARMORY Exar	m 🗸					

Print Training History Print Certificate

The *Training Record* tab shows a history of courses attended by the current user. Each course is marked whether the user passed or failed the examination.

- Click **Print Training History** to print a listing of all courses.
- Highlight a course in the list that is marked as *Passed*, and the option to **Print Certificate** is available at the bottom right. Clicking the button will print a PDF certificate for the selected class.

Attachments

Gene	aneral Information Training Record Attachments				
Ad	d View	Save Delete	;		
	Description	File Name	Date Added	File Size	

Attachments may be added, viewed and deleted using the toolbar at the top of the *Attachments* tab.

- Add: Associate a new attachment with the user profile.
 - After clicking *Add*, navigate to the desired file on the local computer, a USB device, or a network location, and click **Open**.
- **View**: View the currently selected attachment.

- Save: Save a copy of the selected attachment on the local computer.
- **Delete**: Delete the selected attachment from the user profile.

Users

å SmartAdmin	- 🗆 ×
DASHBOARD PROFILE USERS TRAINING REPORTS SETTINGS	Logout
Name ID Numbers Assigned Positions Gun Information	Search
Last Name	Defaults
First Name	Clear
Middle Name	

If permissions allow such, the *Users* tab allows the user can search the employee listing and view information about the selected record. The *Search* button is grayed out if the current user is denied user searching access. Available information about each user is the same as that available on the *Profile* tab about the current user.

TIPS

- ✓ Clicking **Search** without entering any search criteria will pull all active Employee records.
- ✓ Include as much information as possible to limit the results returned.
- \checkmark Click **Clear** to remove the current search criteria and any results obtained using them.

Search by Name

Jame ID Numbers Assigned Positions	Gun Information	
t Name		
e		
dle Name		
ude Archived Employees?		

- 1. Enter the desired user's Last Name, First Name, and Middle Name, as available.
- 2. If desired, place a check beside **Include Archived Employees?**. This will expand the search to include user who are no longer employed by the agency.
- 3. Click Search.
- 4. Highlight the desired record, and click View Employee Record.

Search by ID Numbers

Name	ID Numbers	Assigned Positions	ned Positions Gun Information					Search
Personnel	No	Emplo	(ee ID			SSN		
reisonner	140.	Emplo	ee ib			3314	1	Defaults
I								
Badge No.		Call N	o. Active	Future	Last			Clear

- 1. Enter information in only one of the available fields.
 - Personnel Number
 - Employee ID
 - SSN (Social Security Number)
 - Badge Number
 - Call Number (Active, Future or Last)
- 2. Click Search.
- 3. Highlight the desired record, and click View Employee Record.

Search by Assigned Positions

Name ID Num	pers Assigned Positions	Gun Information	Search
Agency Group	Agency	Rank	Defaults
StudentGroup	•		Clear

1. Choose one or more criteria from the drop-down menus.

Agency Group	These are configured on the <i>Agency Grouping</i> tab of <i>Settings</i> .
Agency	These are pulled from Master Configuration.
Rank	These are pulled from Master Configuration.
Student Group	These are configured in the <i>Student Grouping</i> tab of <i>Settings</i> .

- 2. Click Search.
- 3. Highlight the desired record, and click **View Employee Record**.

Search by Gun Information

Name	ID Numbers	Assigned Positions	Gun Information	Search
Serial No				Defaults
				Clear

- 1. Enter the firearm's **Serial Number**.
- 2. Click Search.
- 3. Highlight the desired record, and click **View Employee Record**.

Training

5				SmartAdmin			- 🗆 🗙
DASH	HBOARD	PROFILE	USERS	TRAINING	REPORTS	SETTINGS	Logout
Courses	Classes						
Title							
Course No.							Create Course
							Search
							Clear

The *Training* tab is used to search for, and create, courses. It is also used for creating the classes within each course.

Courses

A course is the primary record for any training program. Lesson plans and classes are created and accessed within the course record.

Searching Course Records



- 1. Enter the **Title** or the **Course Number** for the course in question.
- 2. Click Search.
- 3. Highlight the desired course record and click **View Course** at the bottom of the window.


✓ A portion of the title or course number may be used to find all records containing the entered criteria. No wildcard characters are required.

Creating a Course Record

If a user has permission to do so, new courses may be created by clicking on **Create Course**.

å		[New Course]			×
Course No. Title		Course Type	Active		A
Instructor Prerequisites		Attendee Prerequisites			
Add	elete		Add Delete		
Course No. Title		Course No. Title			
Loreon Plans					
Add Delete Copy From Selected	General Information Class	ses Attachments Tests			
14 12 19 0	Version Number			Effective Date	
12/18/2014 12:04 PM to 12/31/2014	14.12.18.0			12/18/2014	5
	Course Length (Hrs)	Is Cert? Is MR?	Is SI? Salary Incentive	Expiration Date	
	Ū.		0	12/31/2014	1
	Description				
				_	
				•	
					•
				Save	Close

The new course is marked Active by default.

- 1. Enter a Course Number and Title.
- 2. Choose the **Course Type** from the drop-down menu.
- 3. Enter any courses the instructor of a class must pass prior to teaching this course under *Instructor Prerequisites*.
 - a. Begin entering a portion of the course name. Suggestions will appear below the field.
 - b. Click on the desired course.
 - c. Click Add.



✓ If a prerequisite is not needed, highlight the course in the list and click **Delete**.

- 4. Enter any courses students must pass prior to taking this course under *Attendee Prerequisites*.
 - a. Begin entering a portion of the course name. Suggestions will appear below the field.
 - b. Click on the desired course.
 - c. Click Add.

- ✓ If a prerequisite is not needed, highlight the course in the list and click **Delete**.
- 5. Enter Lesson Plan information in the bottom half of the window.

Additional lesson plans may be created on a course so that new classes and tests can be set up.

✓ The Course Number, Title, and Course Type are required to create a class.

General Information

General Information	Classes	Attachment	s Tests				
Version Number						Effective Date	
14.09.17.0						9/17/2014	15
Course Length (Hrs)		Is Cert?	Is MR?	Is SI?	Salary Incentive	Expiration Date	
0					0	12/31/2014	15
Description							
							•

- 1. The **Version Number** is automatically populated according to the configurations set on the *Settings* tab. Change this, if necessary.
- 2. The **Effective Date** of the lesson plan is automatically populated with the date the plan was created. Change this, if necessary.



✓ The date can be manually entered using the format of MM/DD/YYYY or selected from a calendar using the drop-down.

- ✓ The last date available for use in the drop-down menu is limited by the value in the *Expiration Date*.
- 3. The **Expiration Date** is automatically set to the end of the current year (e.g. 12/31/2014). Change this, if necessary.
- 4. Enter the **Course Length** in hours.
- 5. Use the check boxes to indicate this is a certification (Is Cert?), mandatory re-training (Is MR?) or there is a salary incentive (Is SI?).
- 6. If there is a **Salary Incentive**, enter the amount of the incentive in the field provided.
- 7. Enter a brief **Description** of the current lesson plan.

Classes

Create Class	View Class			
Class Title	Begin Date	End Date	Completed	

This tab is used to create and administer classes associated with the current lesson plan. Refer to <u>Classes</u> for more information.

Attachments



This tab is used to upload items class members will need when taking the course to which the lesson plan is associated.

- 1. Click Add.
- 2. Navigate to the desired attachment on the local computer, a USB drive, or a network location.
- 3. Double-click the file or click **Open** to attach the file.



- ✓ Click **View** to open the highlighted attachment.
- \checkmark Click **Save** to save a copy of the attachment on the local computer.

✓ Click **Delete** above the *Class Attachments* list to remove the attachment from the class record.

Tests

General Inform	nation Classes	Attachments Tests				
Add Dele	ete	▼ Add Firea	irm Type			
Title	Is Firearm?	Firearm Types	Attempts Allowed	Record Scores?	Allow Remedial Training?	
Test Exar	n 🗌		1			

A test record is created automatically when a course is created. This record should be used prior to creating any further tests associated with the course. Use **[Tab]** to move between the columns.

Important: Test content is not configured here. That is set up by the instructor outside of *SmartAdmin*. The configuration settings here set up a venue for recording the results of testing.

1. Double-click on the title of the exam to change it.



- ✓ Do not set the test title to be the same as the course or class title. This will cause the application to crash.
- 2. If the exam uses firearms, place a check beneath Is Firearm?.
- 3. If firearms are used in the course of taking the exam, acceptable firearm types may be listed on the test record.
 - a. Choose a firearm type from the drop-down menu above the test listing. These are configured in *Firearm Types* under *Settings*.
 - b. Click Add Firearm Type.
- 4. Enter the maximum number of attempts class members may utilize to pass the test.
- 5. If scores will be recorded, instead of a simple pass/fail, place a check beneath **Record Scores?**.
- 6. If remedial training is permitted after failing the exam, place a check beneath **Allow Remedial Training**.

Classes

Searching Class Records

Courses C	lasses	
Title		Search
Course No.		Clear
Start Date		
End Date		
Completed?		

Enter criteria in the search fields to limit the number of results received.

Title	Enter all or a portion of the class title.
Course Number	Enter all or a portion of the associated course number.
Start Date	Enter the date on which the class started or will start.
End Date	Enter the date on which the class ended or will end.
Completed?	To include classes that have been marked <i>Completed</i> , place a check here. By default, completed classes are not included in the search results.

Creating a Class Record

General Informa	tion Classes	Attachments	Tests
Caractar Classe	View Class		
Create Class	view class		
Class Title	Begin Date	End Date	Completed

1. Click Create Class.

å	Save Course?	×
Save (You now?	Course? must save the Course to create a Class for it. Sa ?	ve
	Save Course Make Changes	

2. Course information must be saved prior to creating a class. Click **Save Course** to continue.

Scheduled Class for BASIC ARMORY	[New Class]	Completed
Class Settings Roster Exam		
Title	Class Dates Thu, 18 Dec 2014 12:06 👻 to	Thu, 18 Dec 2014 12:06 👘 🗙
Training Director		Lead Instructor
Instructors	Add Make TD Delete Make LI	Location Room Information
Name Employee ID Agency		# Dir Street Unknown City State Zip
Class Attachments		Lesson Plan Attachments
Description File Name Date Added Fil	e Size	Description File Name Date Added File Size
•		
Print Roster Print Certificates		Save Save & Close Close

- 3. Enter a class Title.
- 4. Enter the **Class Dates** during which the class will occur using the dropdown menus. The beginning and ending times may also be entered.



- ✓ Enter the ending date and time first. The dates available for the beginning date are determined by the ending date. This prevents accidentally making the beginning date after the ending date.
- 5. The *Training Director* and *Lead Instructor* fields are both read-only fields. However, the information to be entered within them can be designated while entering instructor information.
 - a. Begin entering the name of an instructor in the field beneath *Instructors*. If *My Agency* is checked, matching employee records will begin displaying beneath the field as suggestions. Select one of these, if applicable.
 - b. Once a name has been entered, two buttons become available.
 - 1) Add: Add the person to the list of instructors for this class. Provided any instructor prerequisites are met, the person is added to the list below.
 - 2) **Make TD**: Designate the person as the *Training Director*. This does not place the person on the list of instructors.

- c. Once the instructor list has been completed, highlighting an instructor record enables two buttons.
 - 1) **Delete**: Remove the selected record from the list of instructors.
 - 2) Make LI: Designate the selected person as the *Lead Instructor*.
- 6. Enter *Location* information.
 - a. Enter **Room Information**. This is to designate a specific room at the address, such as a conference room.
 - b. Enter the street Number, Direction, Street, City, State, and Zip.
- 7. Any attachments related specifically to this class, but not part of the lesson plan, should be added under *Class Attachments*.
 - a. Click Add.
 - b. Navigate to the desired attachment on the local computer, a USB drive, or a network location.
 - c. Double-click the file or click **Open** to attach the file.



- ✓ Any attachments associated with the lesson plan are listed under Lesson Plan Attachments.
- ✓ Click **View** to open the highlighted attachment.
- ✓ Click **Save** to save a copy of the attachment on the local computer.
- ✓ Click **Delete** above the *Class Attachments* list to remove the attachment from the class record.
- 8. Click **Save** before proceeding to the *Roster* tab.

Assigning Class Members (Roster)

å			1]	New Class]				×
Schedule	ed Class for BASIC	ARMORY						Completed
Class Settings	Roster Exam							
Add		My Agency	Delete Bulk Add	Add From DL	Other Attendee	Groups:	AND ANOTHER 🔻	Group Add
Name	Employee ID Agency							
Print Roster	Print Certificates						Save S	ave & Close

There are five (5) methods for assigning class members.

Once all class members have been added, print options become available at the bottom.

Print Roster	Create a PDF report showing all students enrolled in the class.
Print Certificates	Print certificates for all attendees who passed the exam.

Click Save or Save & Close, when finished.

Adding Individual Class Members

- 1. Begin typing the person's name to the right of *Add*. If **My Agency** is checked, the suggestions will appear below the field.
- 2. After fully entering or selecting the person, click **Add** to the left.

Adding Multiple Class Members

1. Click Bulk Add. The Choose Students window appears.

3				Choose Students		×
Name	ID N	umbers	Assigned Positions	Gun Information		Search
Last Name						Defaults
First Name						Clear
Middle Na	ne]	cicui
Include Are	hived E	mployees?				

Search options are identical to that of the <u>Users tab</u> from the main application window.

- 2. Perform a query for the desired employee records.
- 3. Select the desired records and click **Add Selected Employees** at the bottom left.



- ✓ To select multiple consecutive employee records, click on the first record, hold down [Shift] and do one of the following:
 - Press the **[Down-Arrow]** until all desired records are selected.
 - Find the last desired record and click on it. All intervening records will also be selected.
- ✓ To select multiple non-consecutive records, hold down [Ctrl] and click on each desired record to highlight it.

Important: These two methods of selection cannot be used at the same time. Use one OR the other.

Adding from a Driver's License

1. Click Add From DL. The DL Reader window appears.

đi -		DL Reader	-		×		
Scan Input							
1							
Scan Results							
Last Name	First Name	Middle Name					
Make New Entry Link to Existing (below)							
Agency (abbreviation)	n:						
Keyboard Reader	Ready to Scan	Found Keyboard-based DL Reader	Add	Clo	se		

Indicators at the bottom show the detection of the card reader and the readiness of the application to receive information from that device.

- 2. Run the Driver's License through the card reader.
- 3. Using the radio buttons, choose whether to make a new entry or match the scanned license with an existing employee.
- 4. Click Add.

Adding Class Members from Other Agencies

This function is typically used to add attendees that are from other agencies.

1. Click Other Attendee. The Create Student window appears.

å	Create Student	- 🗆 🗙
Last Name	First Name	Middle Name
Agency		
Add Close		

- 2. Enter the student's Last Name, First Name, and Middle Name.
- 3. Enter the Agency from which the student comes.
- 4. Click Add.

Adding Groups

This function is used to add pre-formed groups to a class. The groups are created and administered on the *Student Grouping* tab within *Settings*.

- 1. Choose a group from the **Groups** drop-down menu.
- 2. Click Group Add.

Recording Test Scores

The third tab in a class record is used to record the attendance of the students and the results of the examination. The name on the tab depends upon the name given to the exam in the lesson plan. If multiple tests were configured, there will be more than three tabs.

Settings Roster	Exam					
ark All Attended	Pass First Attempts	Print Scores				
NAME						
MAHAFFEY, SHA	WN ANTHONY	Didn't Attend	[1] N/A			
DALE, KAREN		Didn't Attend	[1] N/A			
nt Roster Print	Certificates				Save	Save & Close

Attendance to a class is an overall yes/no criteria. If the class covers multiple days, daily attendance will need to be tracked externally. The buttons above the list of enrolled students may be used to perform repetitive actions.

Mark All Attended	Mark all enrolled students has having attended the class.
Pass First Attempts	Mark all students has having passed the exam on their first attempt. This does not record any scores. This function will not work on a firearm exam or if all students did not attend the class.
Print Scores	This creates a PDF report showing all students, their attendance, and test scores.

To edit an individual attendee's attendance and exam results, highlight the desired student, and click **Edit** to the left.

Exams without Firearms

4	MAHAF	FEY, SHAWN ANTHONY		×
N/A	Attended?	Needs Remedial Training?		
Add Attempt				
Scores	Did Dava2	Course and Course		
Attempt [1]	Did Pass?	Score:		
			Save	Close

The first exam attempt is automatically added, though it is disabled until *Attended?* has been checked.

- 1. Mark the attendance of the student.
 - N/A: This designates the students attendance is not applicable. Test scores cannot be entered. Use this only if orders or other unforeseen circumstances prevent attendance.
 - Attended?: Mark this to indicate the student's attendance to the class. Test scores may now be entered.
- 2. If the student attended the course and passed the exam on the first attempt, place a check beside **Did Pass?**.
- 3. If configured for such, enter the **Score**.
- 4. If necessary, and configured for such, additional attempts may be recorded by clicking **Add Attempt** and repeating steps 2 and 3.
- 5. The *Needs Remedial Training* check-box may become active after all attempts have been recorded. This will only occur if the exam has been designed to allow such and all attempts were recorded as failures to pass the exam. Check this, if applicable.

Exams with Firearms

6		MAHAFFEY, S	HAWN ANTHONY			×
N/A	Attended?	Needs Remed	lial Training?			
ТҮРЕ	MAKE	MODEL	SERIAL NO	CALIBER	HOLSTER	
Add from Prop	erties Add from Hist	ory			Save	Close

- 1. Mark the attendance of the student.
 - N/A: This designates the students attendance is not applicable. Test scores cannot be entered. Use this only if orders or other unforeseen circumstances prevent attendance.
 - Attended?: Mark this to indicate the student's attendance to the class. Test scores may now be entered.
- 2. Add an exam attempt.
 - Add from Properties: Add a firearm issued to the officer in *Issued Property*. This creates the attempt with firearm information pre-filled from *Issued Property*.
 - Add from History: Add a firearm previously used by the officer for examinations. This creates the attempt with firearm information pre-filled from historical data.
 - Add: Manually add all firearm information. This creates a blank attempt record.

å		MAHAFFEY, SI	HAWN ANTHONY			×
N/A	Attended?	Needs Remedi	al Training?			
ТҮРЕ	MAKE	MODEL	SERIAL NO	CALIBER	HOLSTER	
	•					
Scores						
Attempt [1]	Did Pass?	Score:]			
Add Test Atte	empt					
L						
Add from Prope	rties Add from Histo	Add			Save	Close

- 3. Choose the firearm **Type** from the drop-down menu. These are configured on the *Firearm Types* tab under *Settings*.
- 4. Enter the Make, Model, Serial Number, Caliber, and Holster information.
- 5. If the student attended the course and passed the exam on the first attempt, place a check beside **Did Pass?**.
- 6. If configured for such, enter the **Score**.
- 7. If necessary, and configured for such, additional attempts may be recorded by repeating steps 2 through 6.
- 8. The *Needs Remedial Training* check-box may become active after all attempts have been recorded. This will only occur if the exam has been designed to allow such and all attempts were recorded as failures to pass the exam. Check this, if applicable.

Reports

ð			SmartAdmin			- • ×
DASHBOARD	PROFILE US	ERS	TRAINING	REPORTS	SETTINGS	Logout
Print Active Courses By Course No	Print Active Courses By Tit	le Print A	All Courses By Course No	Print All Courses By	Title	

The *Reports* tab may be used to print general reports from available records in the application. All reports are generated as PDF documents to allow saving to another location or printing.

Print Active Courses By Course Number	Print a report showing only those courses that
That Active Courses by Course Number	ordered by Course Number.
	Print a report showing only those courses that
Print Active Courses By Title	have not been marked complete. The report is
	ordered by Course Title.
	Print a report showing all recorded courses
Print All Courses By Course Number	ordered by Course Number.
	Print a report showing all recorded courses
Print All Courses By Title	regardless of completion status. The report is
	ordered by Course Title.

Settings

6						SmartAdmin			- 🗆 🗙
	DASH	BOARD	PROF	LE US	SERS TR	RAINING	REPORTS	SETTINGS	Logout
	Firearm Types	Version For	mat Stude	nt Grouping	Default Test	Agency Group	ing		
A	dd Delete								
	BB	BB GUN							
•	cc	CC GUNNERY							
Ľ	HG	HANDGUN							
Ľ	ON	NOTHING SPECIAL	L						
1	ÞÈ	PERSONAL FIREAR	IM						
1	R	RIFLE							
1	SG	SHOTGUN							
	THI	BLAH							
									Save Firearm Types

The *Settings* tab allows users to determine default program behavior and configure some drop-downs.

Firearm Types

Fire	arm Type	Version Format	Student Grouping	Default Test	Agency Grouping
Add	Delete				
BB		BB GUN			
сс		CC GUNNERY			
HG		HANDGUN			
NO		NOTHING SPECIAL			
PF		PERSONAL FIREARM			
R		RIFLE			
SG		SHOTGUN			
THI		BLAH			

Save Firearm Types

The *Firearm Types* tab allows users to configure types of firearms that may be used for examinations.

- 1. Click Add at the top. A new line is created at the top of the list.
- 2. In the first column, enter a two or three character abbreviation for the firearm type. i.e. HG
- 3. In the second column, enter the extended name of the firearm type. i.e. HANDGUN
- 4. Click Save Firearm Types at the bottom right when finished adding firearm types.



✓ To delete a firearm type, highlight it and click **Delete** at the top.

Version Format

Firearm Types	Version Format	Student Grouping	Default Test	Agency Grouping
Major	Minor Build	Revision	Auto Inc	
Year 🔻 .	Month 🔻 . Day	▼ . Number ▼	✓	

Save Version Format

The Version Format tab is used to configure the automatic version numbering of lesson plans. Four main settings are available: *Major*, *Minor*, *Build*, and *Revision*.

Place a check under **Auto Inc** to automatically increment the *Revision* value with each new lesson plan when multiple plans are created on the same day.

Using the configuration shown in the above screenshot, a lesson plan where the number is 2014.09.14.0 is broken down in the following table.

Version Value	Version Type	Version Information
2014	Major	The lesson plan was created in 2014.
09	Minor	The lesson plan was created in the 9 th month (September).
14	Build	The lesson plan was created on the 14 th day of the month.
0	Revision	This is the original lesson plan created on that day. Subsequent plans would have a revision of 1, 2, etc.

Major

Major	
Year	•
Year	
Month	
v	

The *Major* version may be set to the current year, the current month, or the letter "v."

Minor



The *Minor* version may be set to the current year, the current month, or a number.

Build



The *Build* may be set to the current day, a number, or a hyphen (-).

Revision

Revision	
Number	•
Number	
-	

The Revision may be set to a number or a hyphen (-).

Student Grouping

Firearm 1	Types Version F	ormat St	udent Gro	ouping	Defau	ılt Test	Age	ncy Group	oing
Groups:			Create	CADET			•	Delete	
Students:			✓ My Age	ncy	Add	Delete		Bulk Add	
Name		Employee ID	Agency						
ELLIFF V	/II, VIRGINIA GIRAFFE	FDS1234	4 CTS						
NICHOL	LAS, GERAINT JOHN		CTS						
OEFING	ER, SCOTT H	1	CTS						
OFFICE,	ALACHUA SHERIFFS	9876	CTS						
OWENS	S, PHILLIP		CTS						
PARIDO	N, BRIAN	21	CTS						
PELFREY	Y, JEREMY	C-108	CTS						
PERDUE	E, ROBERT		CTS						
PERKINS	S, STANLEY		CTS						
PERSON	N, QA TESTING		SRSO						
PETTIBO	ONE, MARK	EmployeeIDX	YZ CTS						

Save Student Groups

The *Student Grouping* tab is used to set up custom groups within an agency so that a group of employees may be assigned at once, instead of adding each individually. An example of this would be a cadet class.

Creating a Group

- 1. Enter a group name in the first field on the *Groups* line at the top.
- 2. Click **Create**. The new group is selected immediately for adding personnel.
- 3. Click Save Student Groups at the bottom right, when finished.



✓ To delete a group, select it in the drop-down menu to the right of *Create*, then click **Delete** to the right. Any members of the group are immediately removed from the group at that time.

Adding Students to the Group

Students may be added individually or using the Bulk Add feature.



- ✓ To remove students from the list, select the record(s) to be removed, then click **Delete** on the *Students* line at the top.
- ✓ All students in the list may be selected for deletion by clicking one, then pressing [Alt+A].
- ✓ Multiple consecutive records may be selected for deletion by clicking on the first, holding down [Shift], and clicking the last.
- ✓ Multiple nonconsecutive records may be selected for deletion by clicking on one, holding down [Ctrl], and individually clicking on any others.

Adding Students Individually

1. Begin entering the student's name in the first field on the *Students* line at the top.

If **My Agency** is checked, names will begin appearing as suggestions below the field. Click on the matching name.

2. Once the name has been entered, click Add.

Adding Multiple Students

1. Click Bulk Add. The Choose Students window appears.



Search options are identical to that of the <u>Users tab</u> from the main application window.

- 2. Perform a query for the desired employee records.
- 3. Select the desired records and click **Add Selected Employees** at the bottom left.

- the second sec

- ✓ To select multiple consecutive employee records, click on the first record, hold down [Shift] and do one of the following:
 - Press the [Down-Arrow] until all desired records are selected.
 - Find the last desired record and click on it. All intervening records will also be selected.
- ✓ To select multiple non-consecutive records, hold down [Ctrl] and click on each desired record to highlight it.

Important: These two methods of selection cannot be used at the same time. Use one OR the other.

Default Test

Firearm Type	s Version Format	Student Grouping	Default Test	Agency Grouping
Default Exam	Written Exam	•		

Save Default Exam

The *Default Test* tab is used to designate the type of exam that will be typically given for classes. Choose it from the **Default Exam** drop-down menu.

Agency Grouping

Firearm Ty	pes Version Forma	t Student Gro	ouping De	fault Test	Agen	cy Groupin
Groups:		Create	FHP		•	Delete
Agencies:		Add	Delete			
Agency 🔺	Organization					
FHPA	FLORIDA HIGHWAY PA	TROL - USED TO SE	UCM RECORE	DS		

Save Agency Groups

The groups created and administered on the *Agency Grouping* tab are used when searching for an employee on the *Users* tab or when using the *Bulk Add* feature adding students to a class or student group.

This function should only be used when multiple agencies are actively utilized in *Employee Master*.

Creating a Group

- 1. Enter a group name in the first field on the *Groups* line at the top.
- 2. Click **Create**. The new group is selected immediately for adding configured agencies.
- 3. Click **Save Agency Groups** at the bottom right, when finished.



✓ To delete a group, select it in the drop-down menu to the right of *Create*, then click **Delete** to the right. Any members of the group are immediately removed from the group at that time.

Adding Agencies to the Group

Configured agencies may be added individually to the group.

1. Begin entering the agencies abbreviation in the first field on the *Agencies* line at the top.

Matching agencies will appear below the field. Select the desired agency.

2. Once the agency has been entered, click **Add**.



- ✓ To remove agencies from the list, select the record(s) to be removed, then click **Delete** on the *Agencies* line at the top.
- ✓ All agencies in the list may be selected for deletion by clicking one, then pressing [Alt+A].
- ✓ Multiple consecutive records may be selected for deletion by clicking on the first, holding down [Shift], and clicking the last.
- ✓ Multiple nonconsecutive records may be selected for deletion by clicking on one, holding down [Ctrl], and individually clicking on any others.