SmartAdmin

Version 9.4

User Manual

Printed December 18, 2014

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This manual is subject to change at any time without warning and should not be construed as a commitment by CTS America. CTS America is not responsible for any errors or misinformation found in this manual. We welcome any comments or suggestions that may improve the quality of our documentation.

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

CTS America

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CTS America

Chapter 1

SmartAdmin Introduction

Version 9.4

User Manual

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Disclaimers

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For questions concerning this manual, please call toll free: **1-800-374-0101**

Technical Support

Toll Free: 877-SMARTCOP (762-7826)

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

Table of Contents

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.

TIPS

✓ 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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Table of Contents

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

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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

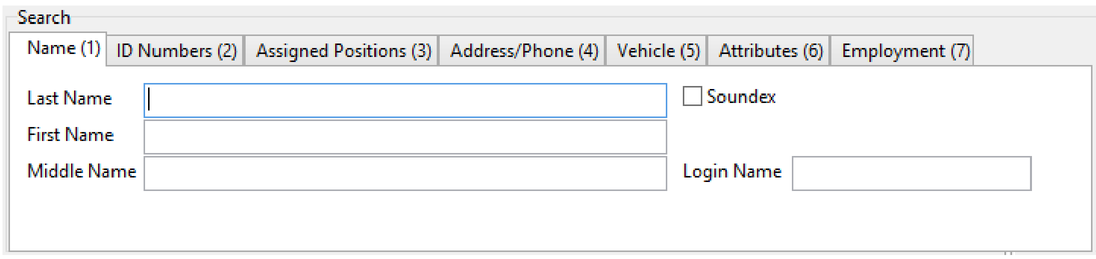
Within Employee Records

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 *User Access*)	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.

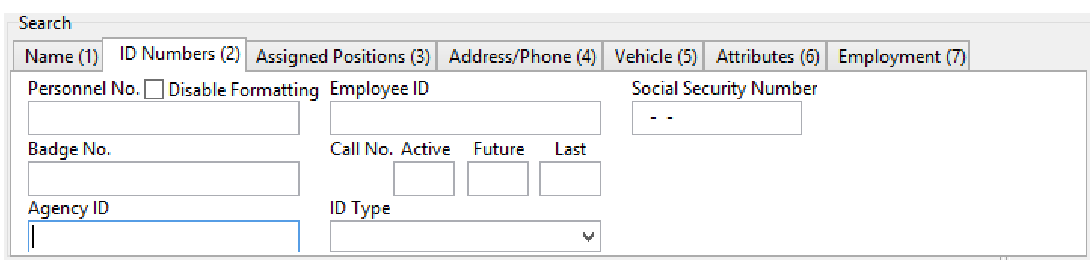
Name



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



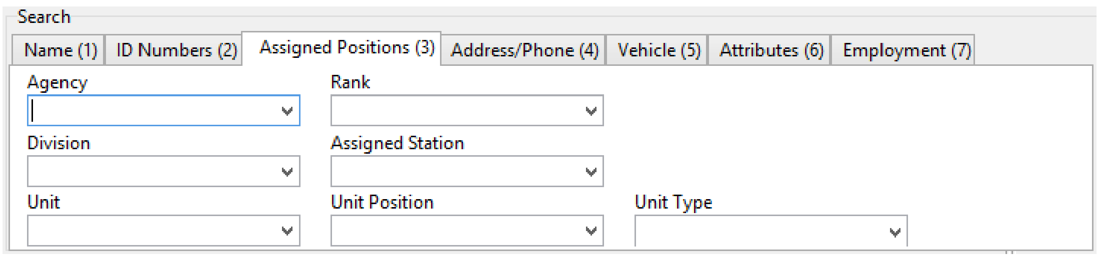
Use this option to search all employee records by various ID numbers.

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.

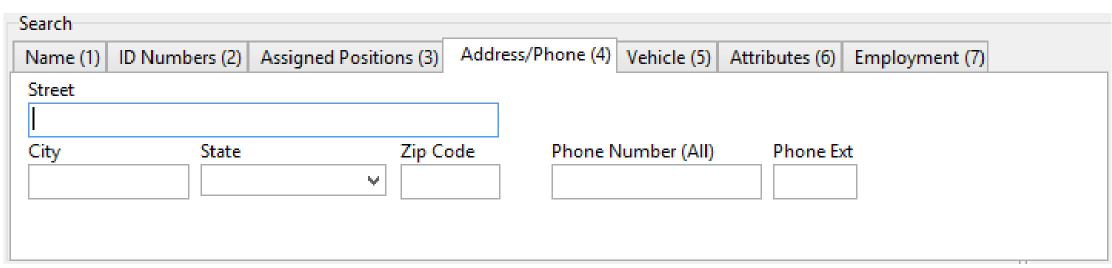
Assigned Positions



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

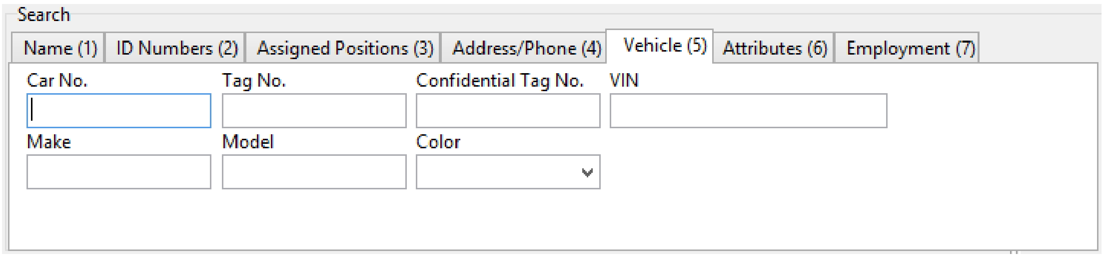


Use this tab to search for an employee by address or phone number.

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



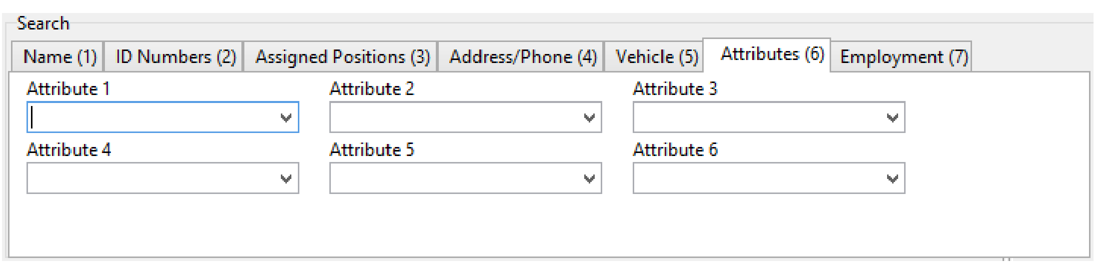
Use this tab to search employee records based upon the vehicle assigned in *Fleet Management*.

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.

TIPS

- ✓ 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



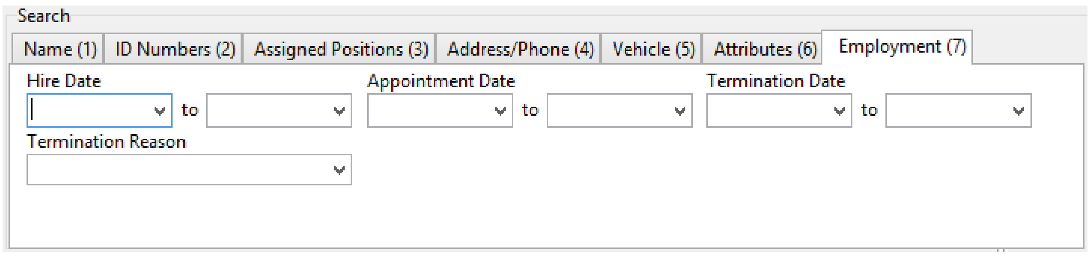
Use this tab to search employee records based upon attributes assigned in *Employee Master*.

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



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 drop-down 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 (Name, ID Numbers, Assigned Positions, Address/Phone, Vehicle, Attributes, Employment).

3. Click on the **Advanced** tab to verify search criteria.

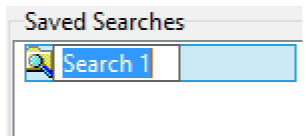
4. Press **[Enter]** or click **Search**. All matching records are listed.

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.



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

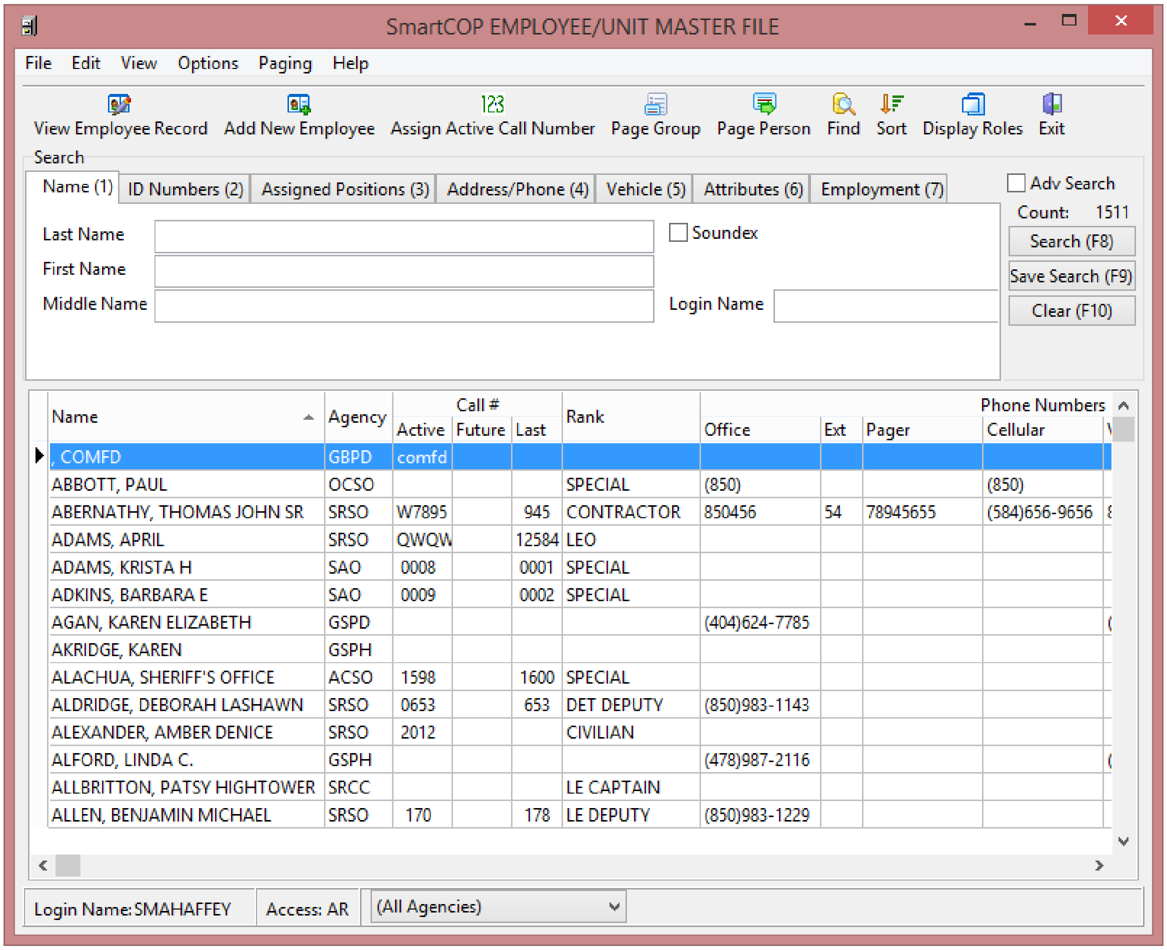
- ✓ Hover the mouse over a saved search folder to reveal the search criteria.
- ✓ Double-click a saved search to run it.
- ✓ Right-click a saved search folder and select **Rename** to change the name of the saved search.
- ✓ To delete a saved search, right-click on it and select **Delete**.

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.

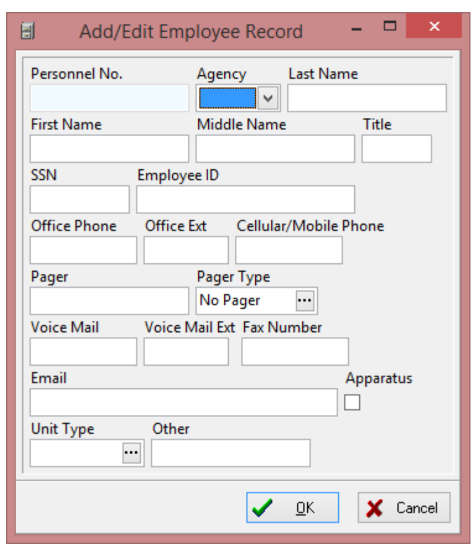
- Right-click on the grid and select a column by which to sort from the context menu.
- Click on the *Options* menu and select **Sort**, then select a column by which to sort from the menu.
- Left-click on the column by which the list should be sorted.

Managing Employee Records

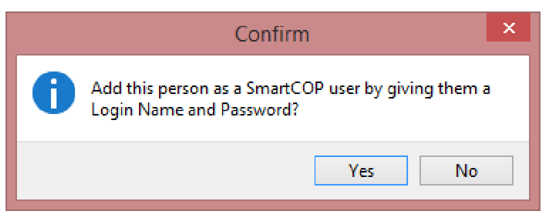


Creating Employee Records

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



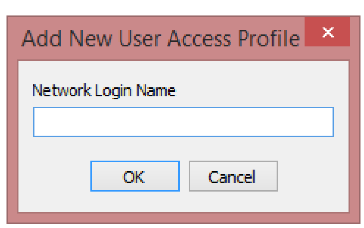
2. Choose the **Agency** from the drop-down menu. Once all information has been entered, the *Personnel Number* is generated based upon the agency chosen (i.e. SRSO14PER000001).
3. Enter the **Last Name**, **First Name**, and **Middle Name** for the new employee.
4. If applicable, enter a **Title**. 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.



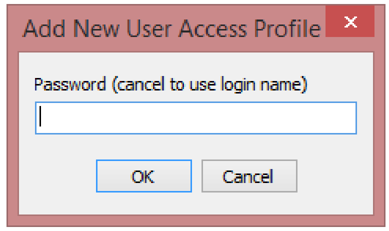
To give this user access to CTS applications, click **Yes**. To add the user to *Employee Master* without providing software access rights, click **No**. If the user will not have application access, skip to step 15.

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.

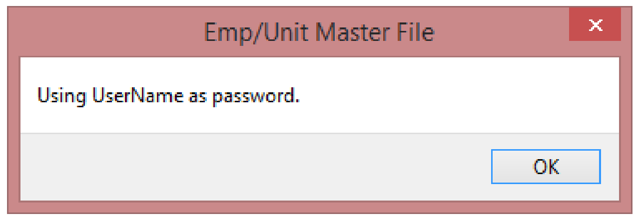


1) Enter the **Network Login Name** and press **[Enter]** or click **OK**.

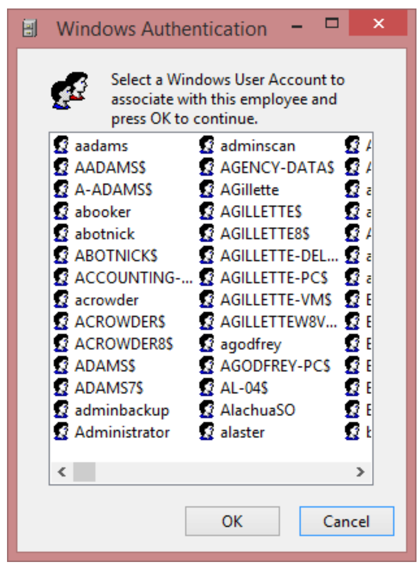


2) Enter a password and click **OK**, OR click **Cancel** to set the password to be the same as the user name.

- If *Cancel* is clicked, a message displays advising how the password was set.



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.



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.

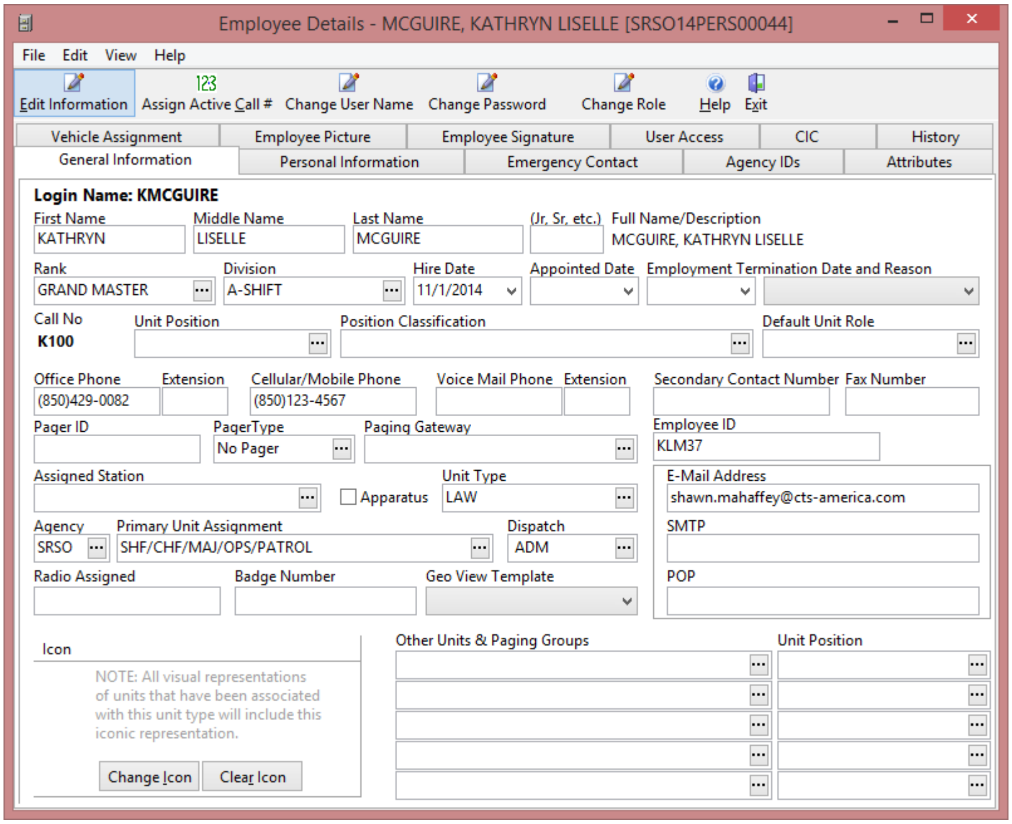
Refer to General Information to complete this part of the employee record.

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.
    - o When viewing the *General Information* tab, click **Edit Information**.
    - o Click **Add Login Name**.

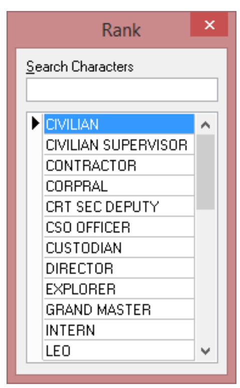
  The application will prompt to set the user name and password as with during profile creation.
- ✓ An employee record without a configured user name will not contain a *User Access* tab.

General Information



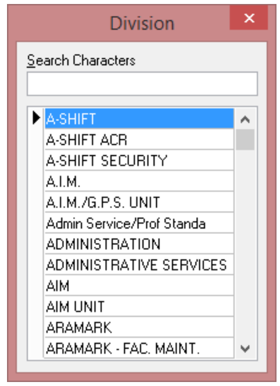
The *General Information* tab is selected by default when an employee record is accessed. When creating a new record, information entered in the *Add/Edit Employee Record* window is automatically populated in the appropriate fields.

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



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.

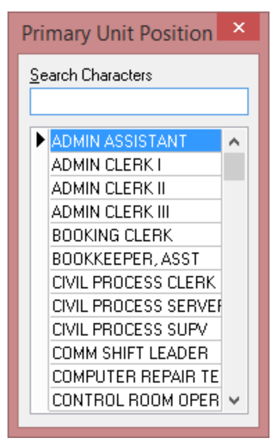


Scroll through the available divisions to find the needed division or begin typing the division name in **Search Characters** to skip to that division in the list. Once found, double-click the division name or highlight it and press **[Enter]** to return to the employee record.

4. Enter the employee's **Hire Date**, in the format of MM/DD/YYYY, or select the date from the drop-down calendar.

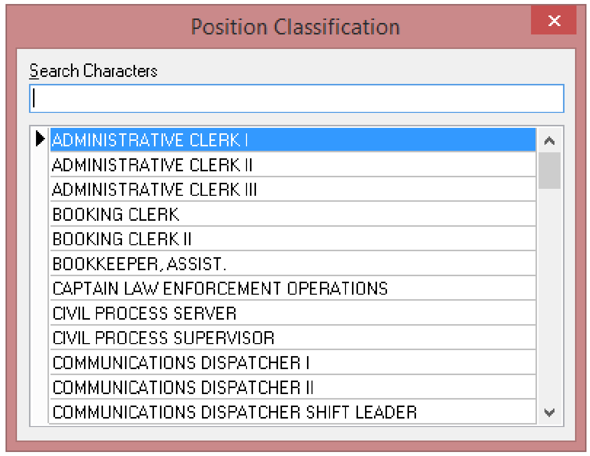
5. If the employee was appointed to a new position, enter the **Appointment Date**, in the format of MM/DD/YYYY, or select the date from the drop-down calendar. This date should be changed whenever the person's appointed rank or position is updated.

6. Click the ellipsis (**…**) beside the *Unit Position* field to choose the employee's assigned position.



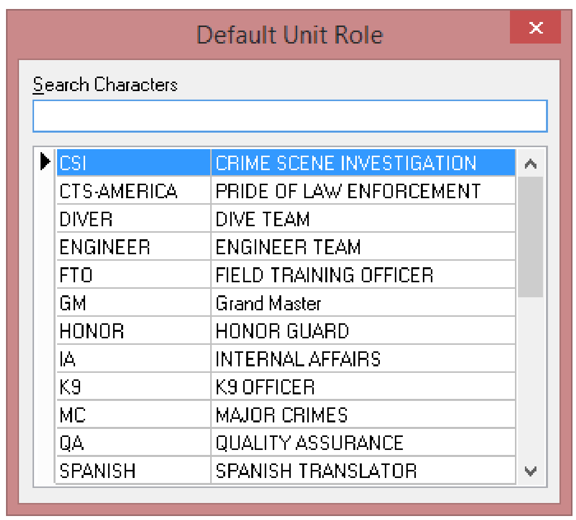
Scroll through the available positions to find the needed position or begin typing the position name in **Search Characters** to skip to that position in the list. Once found, double-click the position name or highlight it and press **[Enter]** to return to the employee record.

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



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*.



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.

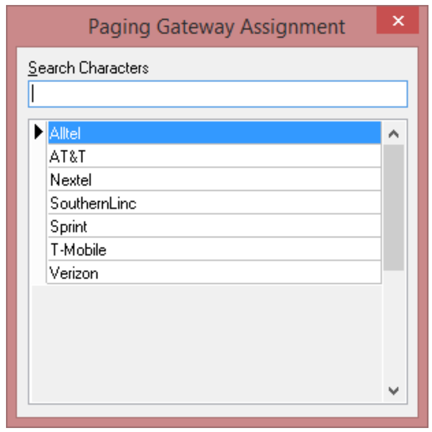
9. If the **Office Phone Number**, **Mobile Phone Number**, **Voice Mail Phone**, and **Fax Number** fields were filled out on the *Add/Edit Employee Record* window. These fields are already populated. If available, enter a **Secondary Contact Number**.

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.

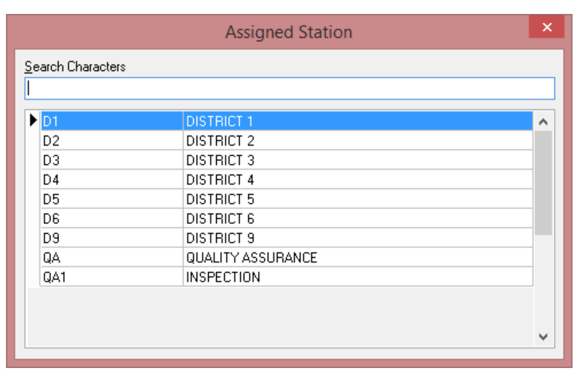


    Scroll through the available service providers to find the needed provider or begin typing the provider in **Search Characters** to skip to that provider in the list. Once found, double-click the service provider or highlight it and press **[Enter]** to return to the employee record.

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.

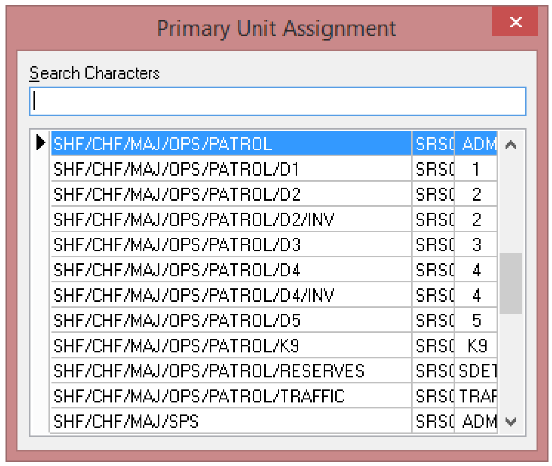


Scroll through the available stations to find the needed station or begin typing the station name in **Search Characters** to skip to that station in the list. Once found, double-click the station name or highlight it and press **[Enter]** to return to the employee record.

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.

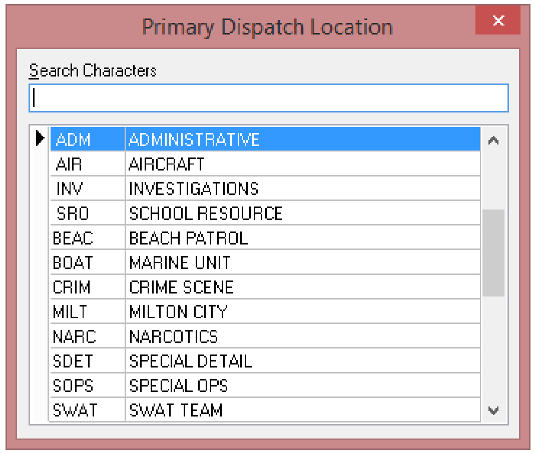


Scroll through the available assignments to find the needed assignment or begin typing the assignment name in **Search Characters** to skip to that assignment in the list. Once found, double-click the assignment or highlight it and press **[Enter]** to return to the employee record.

✓ 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.



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**.

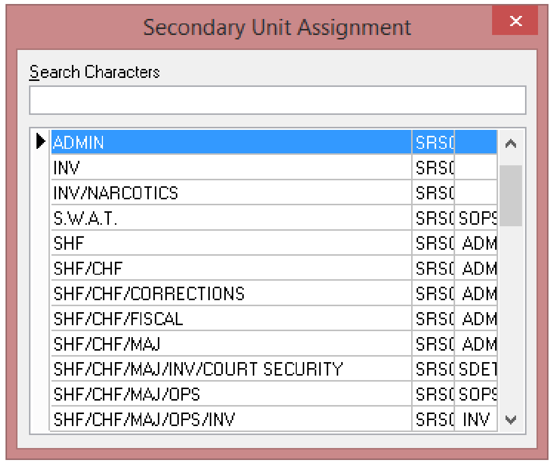
TIPS

✓ An icon can be cleared using the *Clear Icon* button.

✓ Icons are assigned to unit types, not individual personnel.

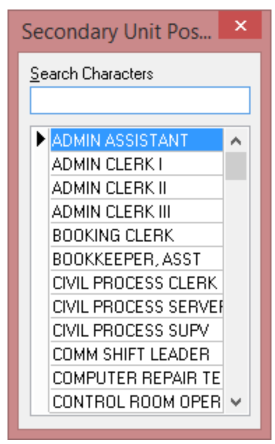
21. Paging in *Employee Master* is usually performed based upon unit assignments. While the *Primary Unit Assignment* and *Unit Position* fields designate the employee's main duties, to five secondary unit assignments and positions can also be assigned.

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



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.



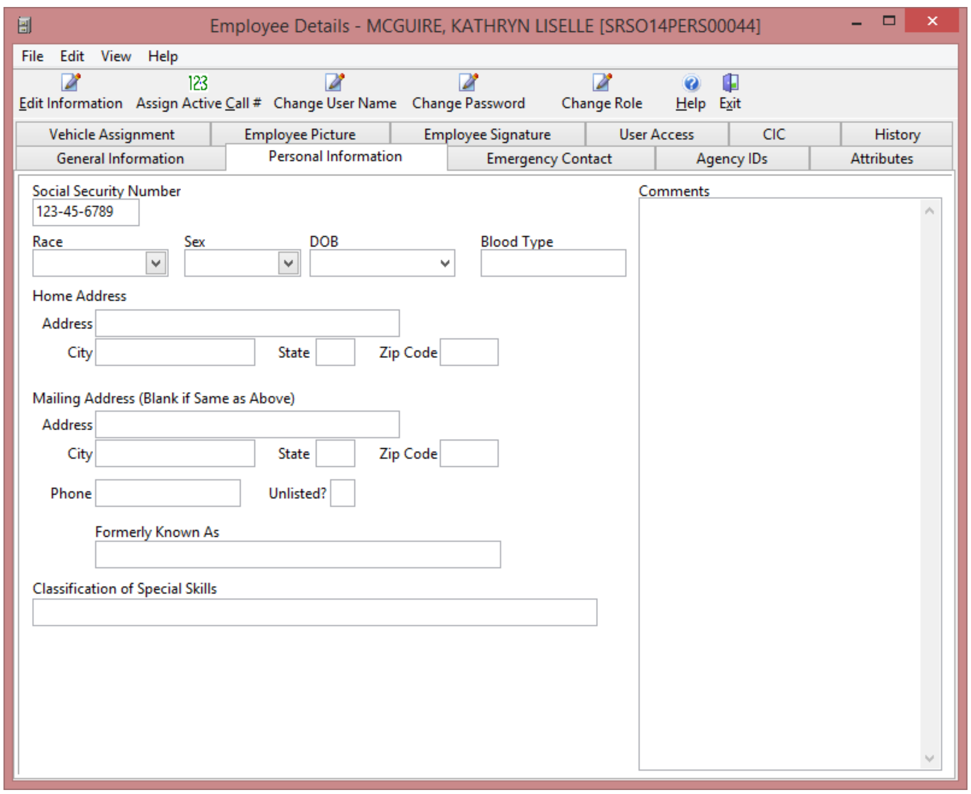
Scroll through the available positions to find the needed position or begin typing the position name in **Search Characters** to skip to that position in the list. Once found, double-click the position name or highlight it and press **[Enter]** to return to the employee record.

TIPS

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

- ✓ 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

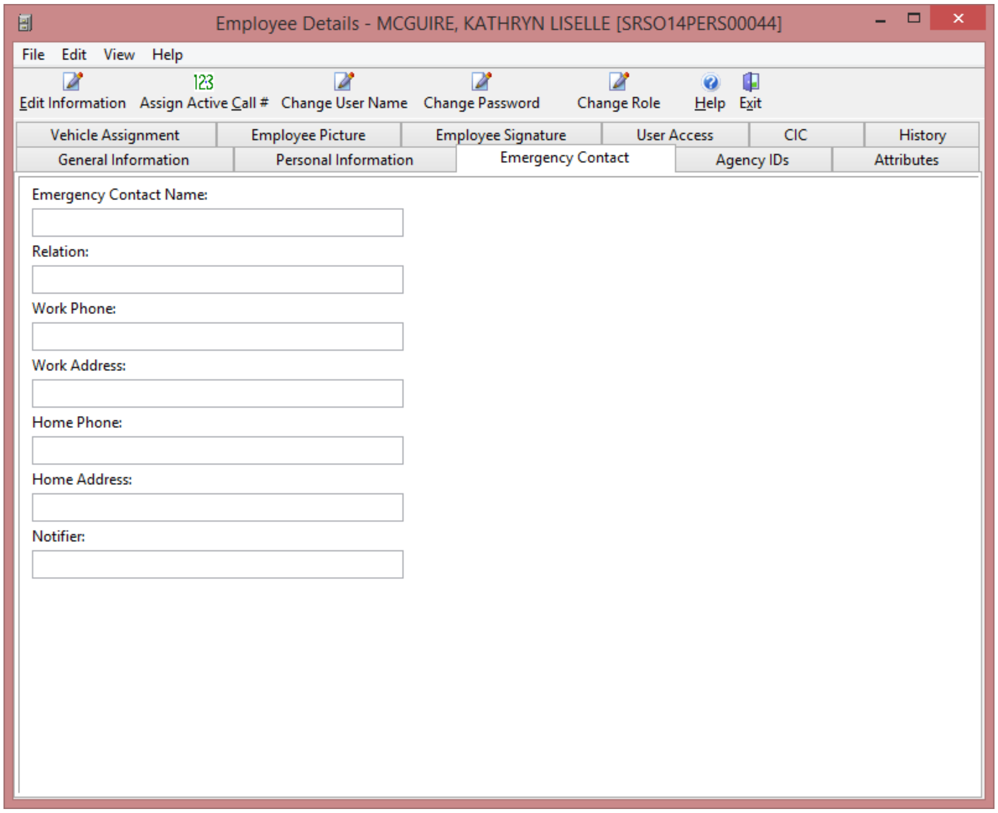


The *Personal Information* tab is used to store confidential vital statistics about the employee.

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.

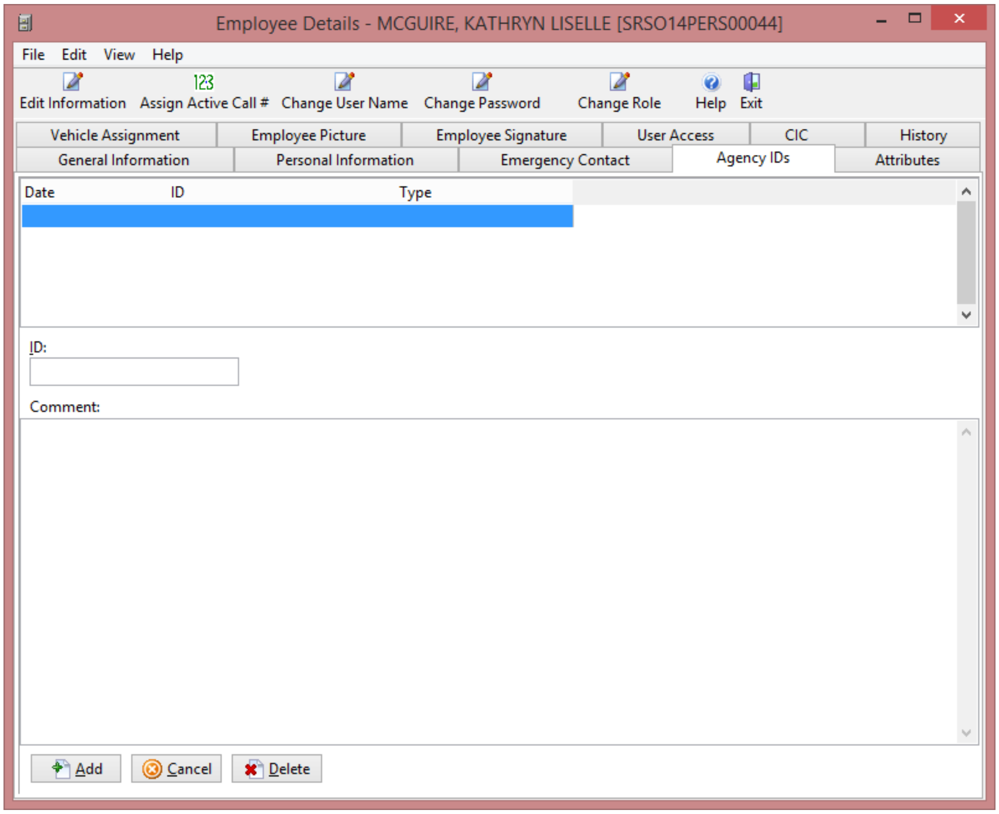
Emergency Contact



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.

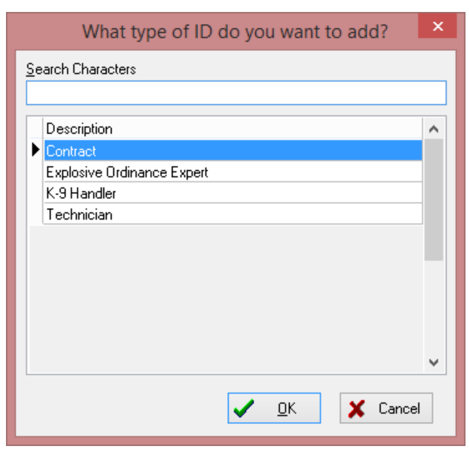
Agency IDs



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.



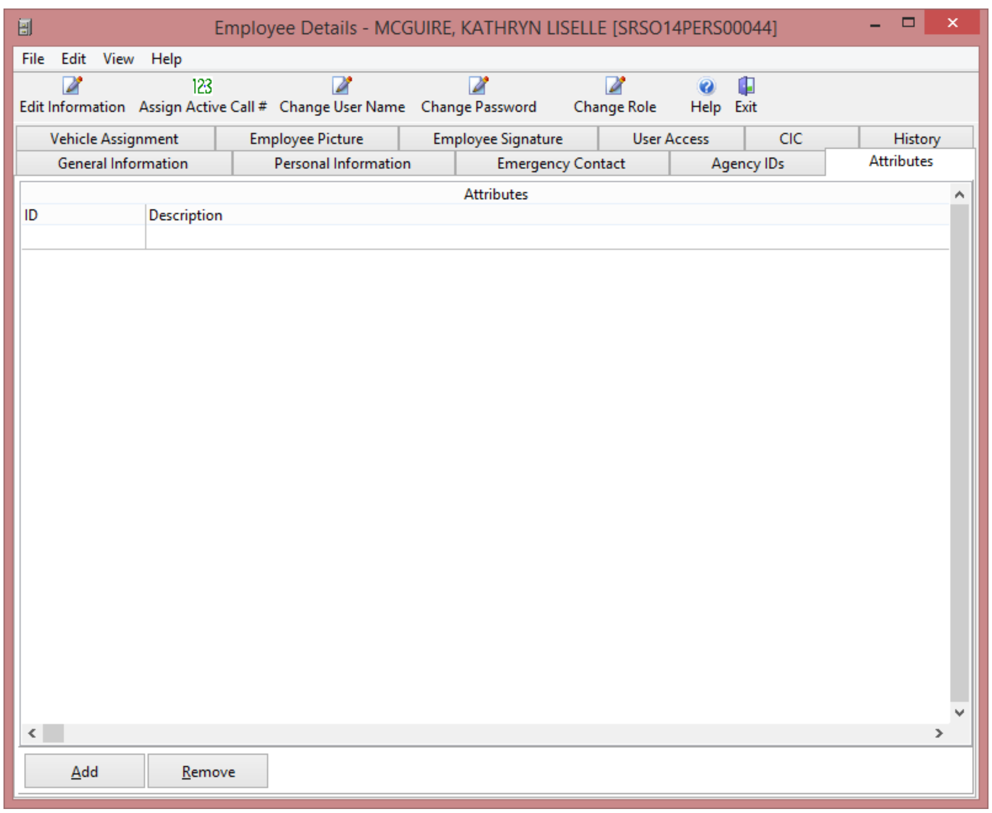
If ID types have not been configured, a message will display informing the user there are no configured ID types from which to choose.

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.

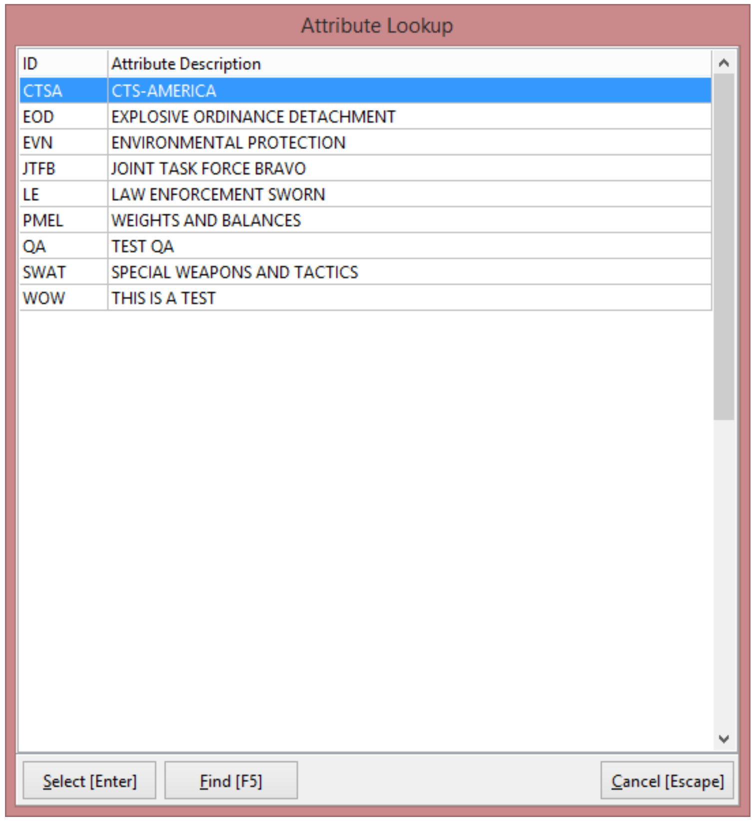
- ✓ Once an ID is added only the *ID* value may be edited.
- ✓ Click **Cancel** to back out unsaved changes to an ID.
- ✓ Click **Delete** to remove the ID from the employee record.

Attributes



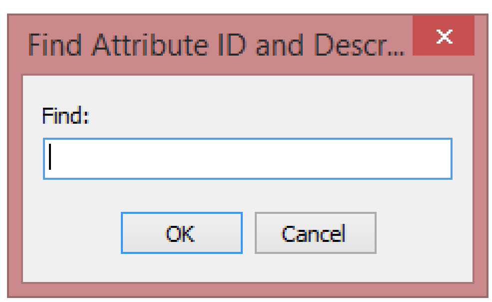
The *Attributes* tab is used to assign characteristics to the employee record. Primarily, these aid dispatchers in assigning officers to CAD incidents. The attributes are configured in *Master Configuration*.

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.



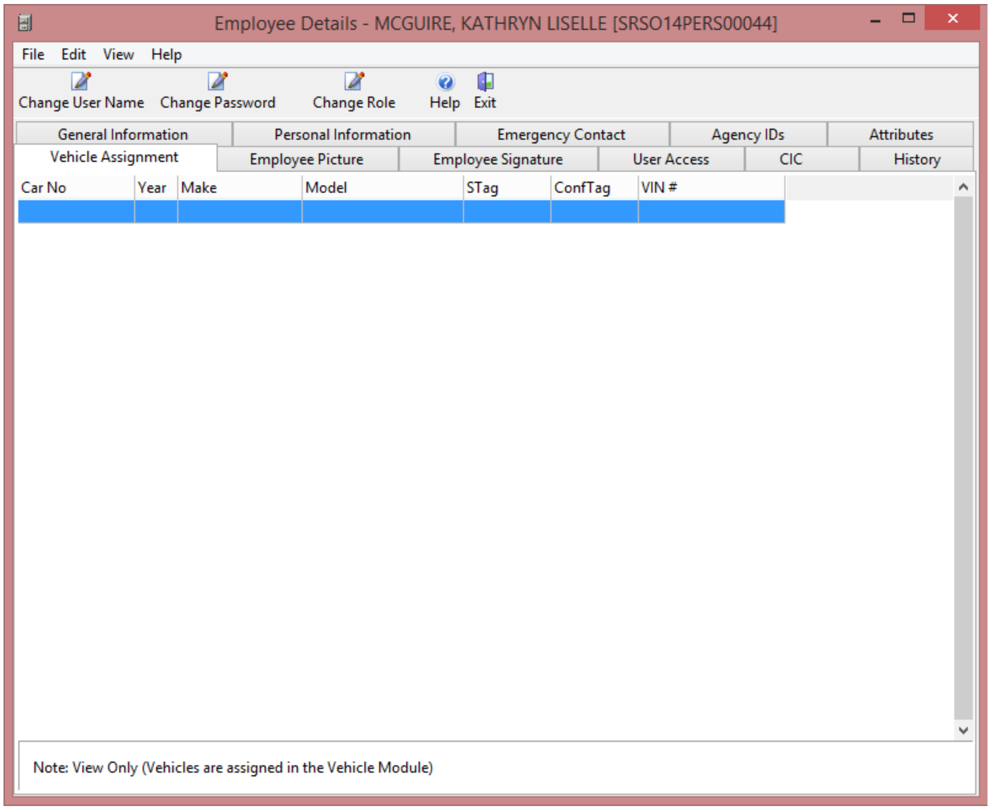
4. Double-click one of the attributes in the list or highlight it and click **Select** or press **[Enter]** to return to the employee record.

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



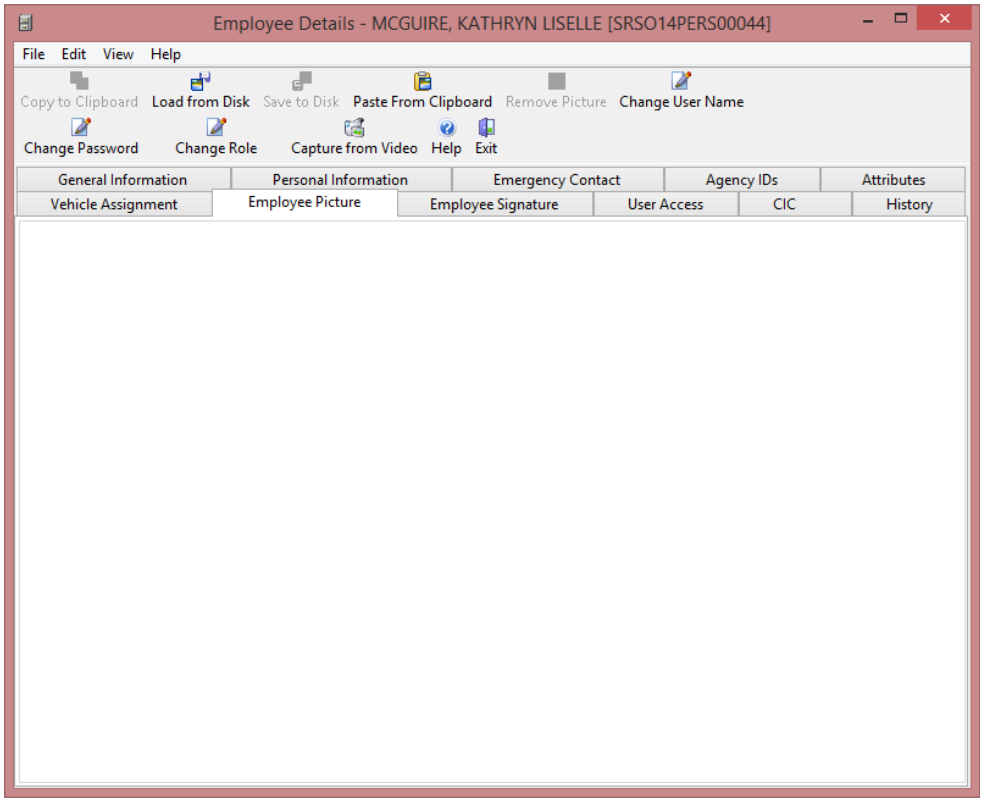
✓ Click **Cancel** to back out of the attribute addition process without making any changes.

Vehicle Assignment



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



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.

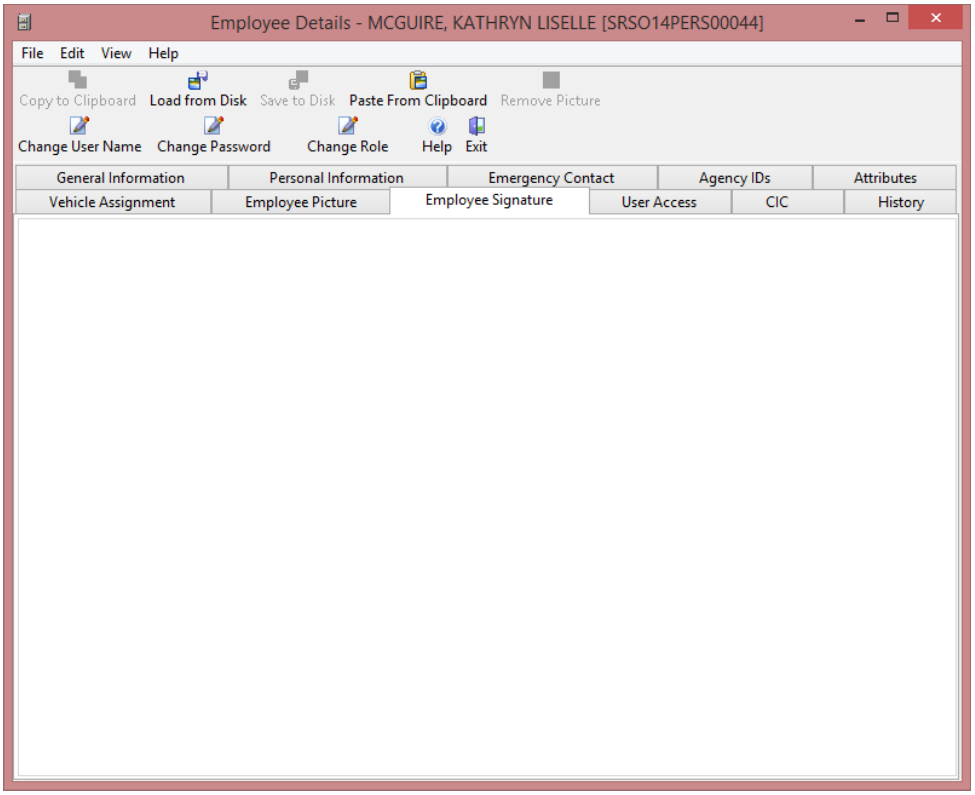
2) When the picture is aligned as needed, press **[F]** or click on **Freeze Video Image**.

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



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

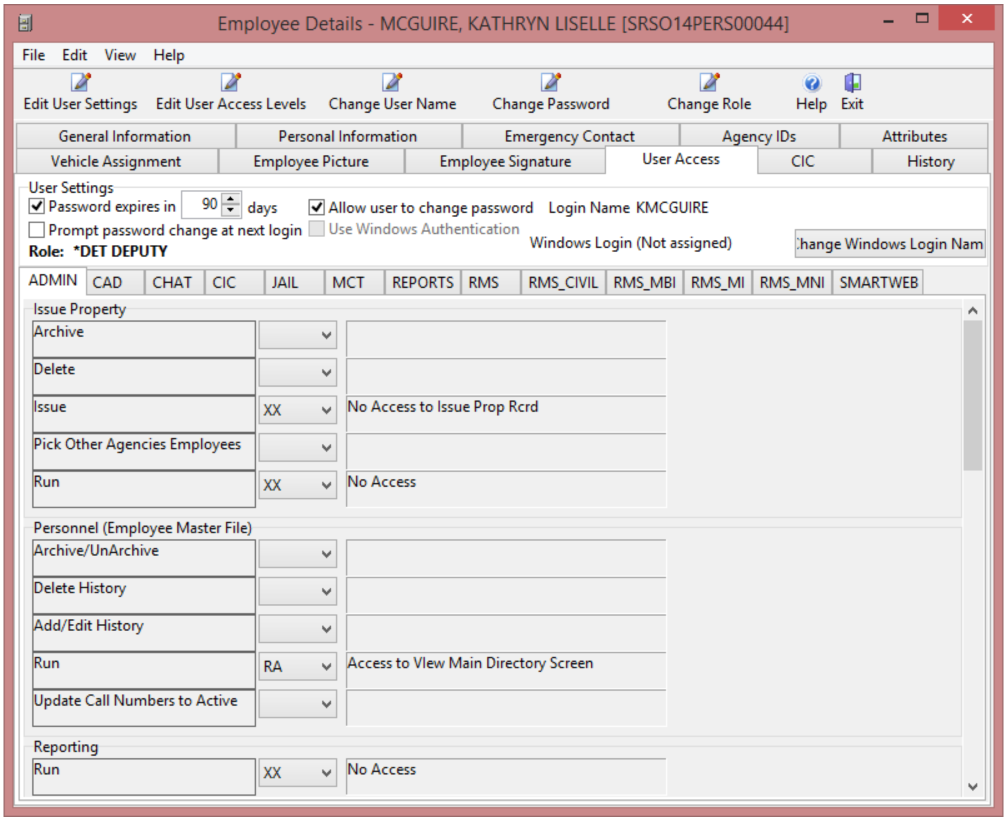
1. Select the **Employee Signature** tab.
2. Choose a method for loading the signature to the employee record.
    a. **Load from Disk**: Load a JPG picture file of the signature from the local computer, a USB drive, or a network location.
        1) Navigate to the desired picture.
        2) Double-click 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**.

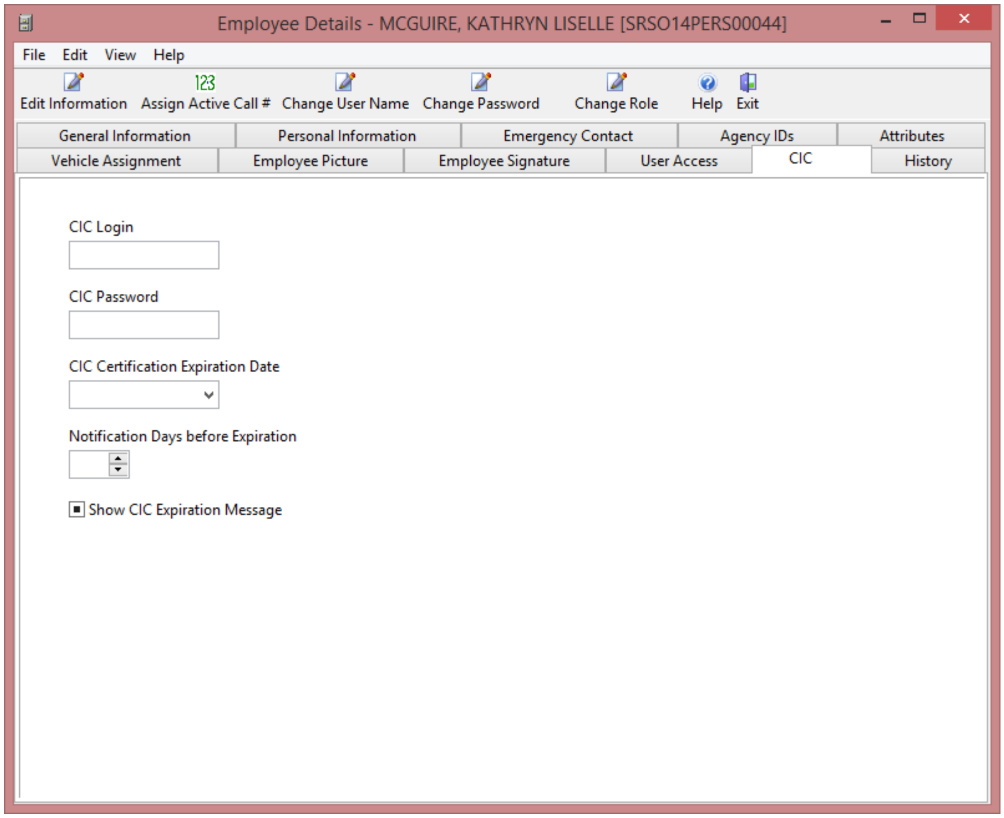
- ✓ To copy the signature from the employee record to another document, click **Copy to Clipboard**. The signature is, then, available for pasting in the desired location.
- ✓ Click **Remove Picture** to delete the signature from the employee record.

User Access



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 Managing User Access for more information.

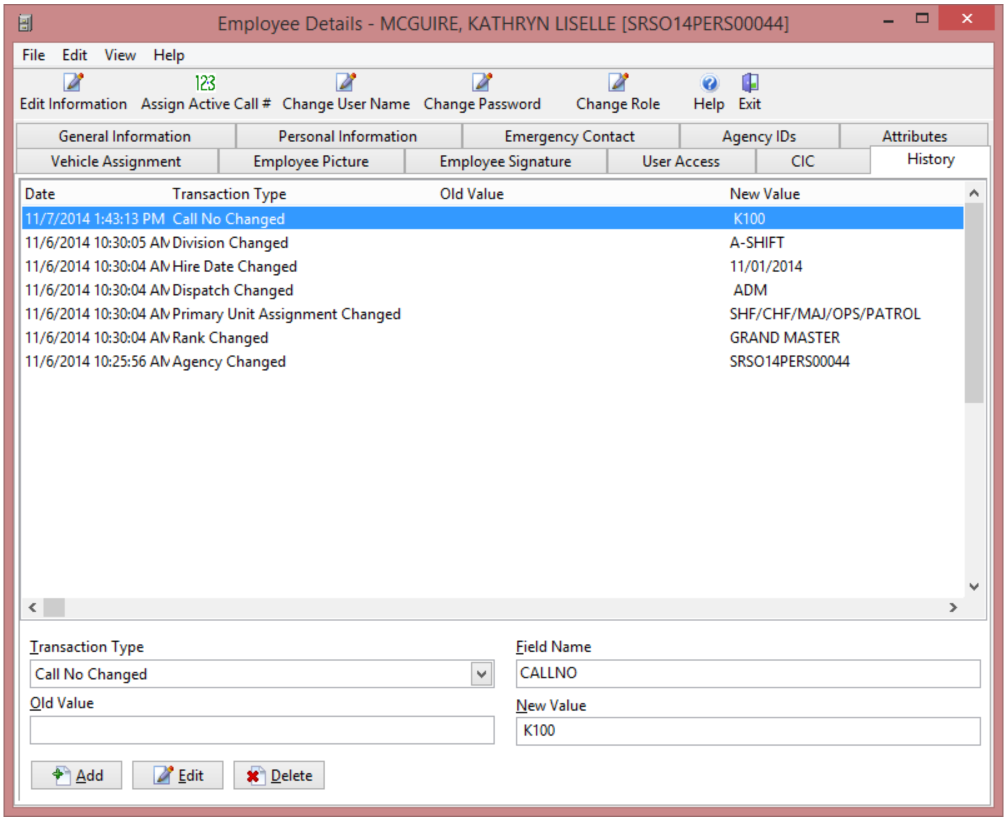
CIC



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



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.

TIPS

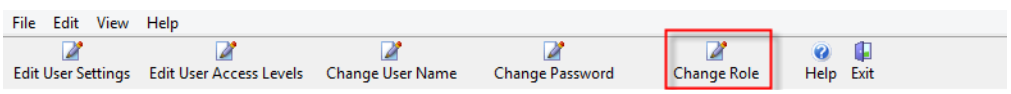
✓ Generally this tab will only be accessed for troubleshooting.

✓ It is not advised that changes should be made to transaction logs.

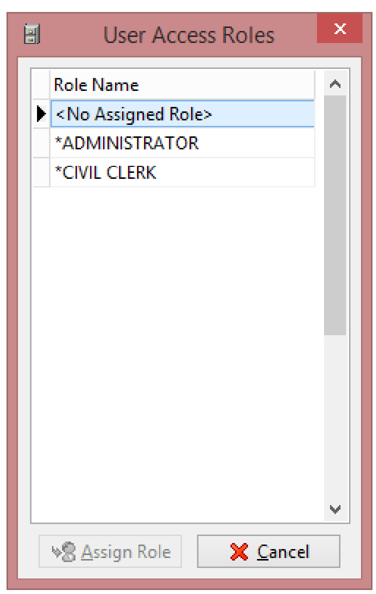
Assigning Roles

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 Managing Roles for more information.

1. Click **Change Role** in the top toolbar.



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



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

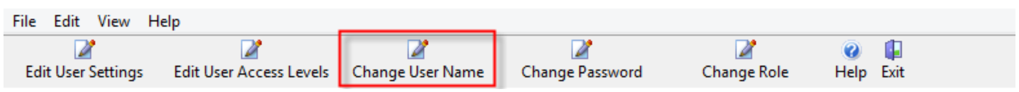
✓ The roles available to be assigned by the user accessing the employee record are only those to which that user has access to assign. Refer to Setting Role Assignment Permissions for more information.

✓ 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.

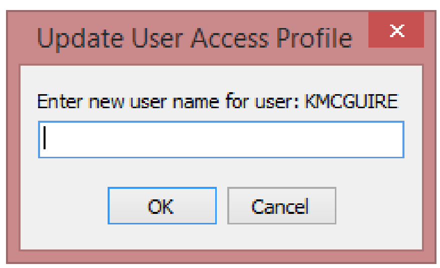
Changing User Names

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.



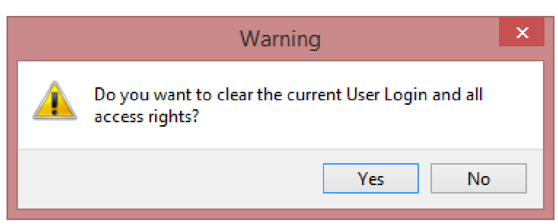
2. Enter the new user name in the *Update User Access Profile* dialog.



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

✓ 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.



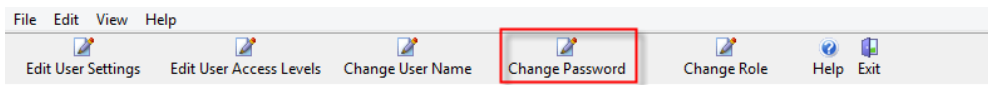
Click **Yes** to clear the login and all user access rights. Click **No** to return to the employee record without making any changes.

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

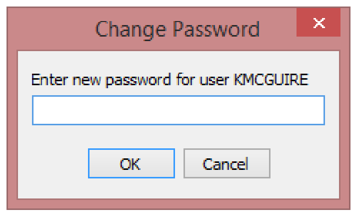
Resetting Passwords

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.

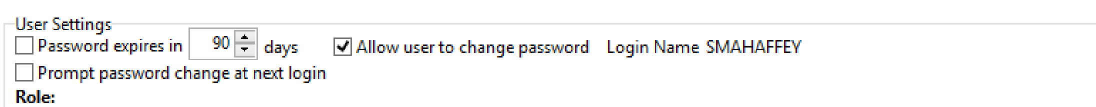


✓ The text of the password will be visible during entry.

✓ The password is case sensitive.

3. Click **OK**. A dialog confirms the successful change of the password.

User Settings



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**.

TIPS

- ✓ 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.

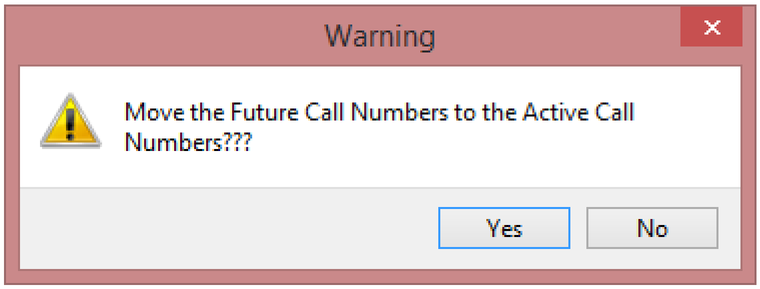
Updating Call Numbers

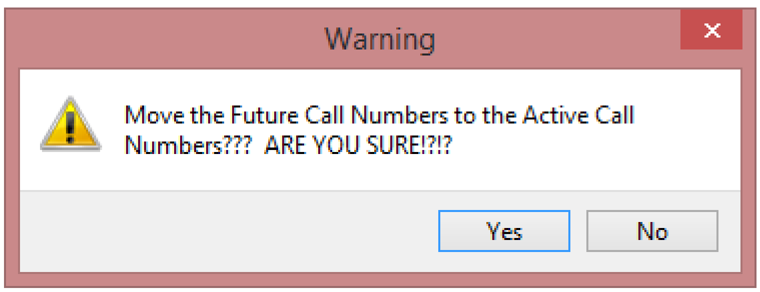
Periodically, an agency may update call numbers to maintain a sequential numbering system. The *Future Call Number* field may be used to designate new call numbers prior to their actual assignment. The method for assigning the call numbers is dependent upon agency policy.

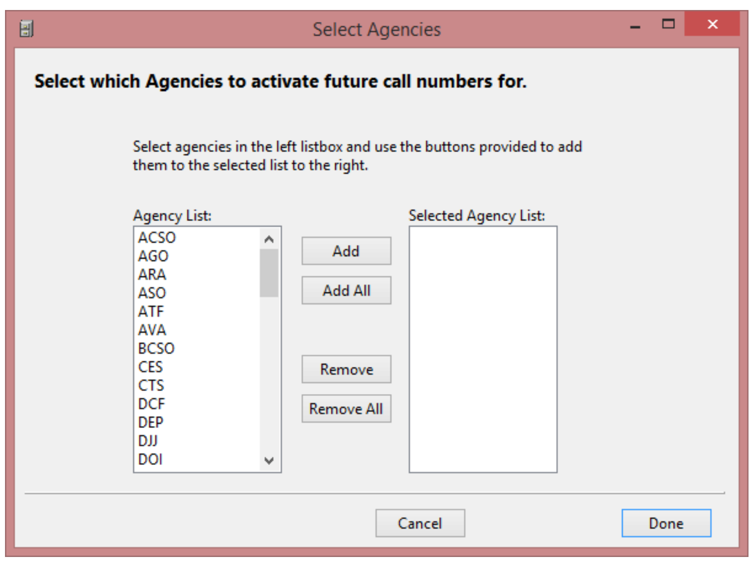
Once all new call numbers have been designated, *Employee Master* can be manually instructed from the *Edit* menu to update all active call numbers with the future call number, or individual records may be updated by right-clicking on the record and selecting **Assign Future Call Number**.

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

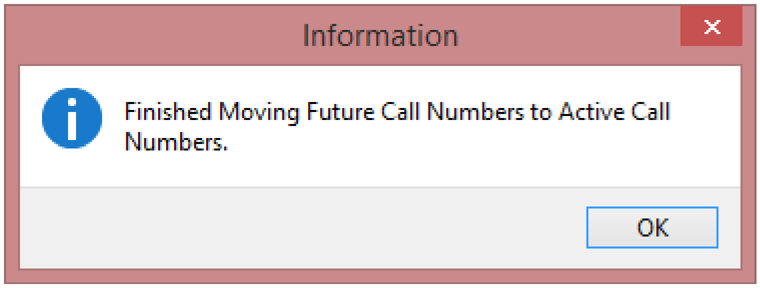
2. Click on the **Edit** menu and click on **Assign Future Call Number** to enter the employee's future call number.
3. Enter the call number and click **OK**.
4. Repeat the prior steps for all employee records requiring a future call number.
5. When all future call numbers have been entered, click on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





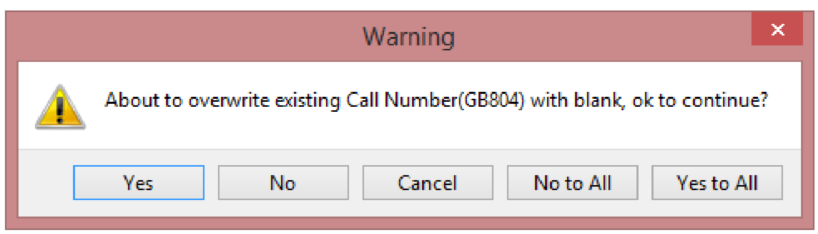


7. Choose the agency (or agencies) for which numbers should be updated.
8. Click **Done**.



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.
  - **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.

TIPS

- ✓ 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.

TIPS

- ✓ Archived employee records are listed in italic text.
- ✓ For information on archiving an employee record, refer to Archiving Employee Records.

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.

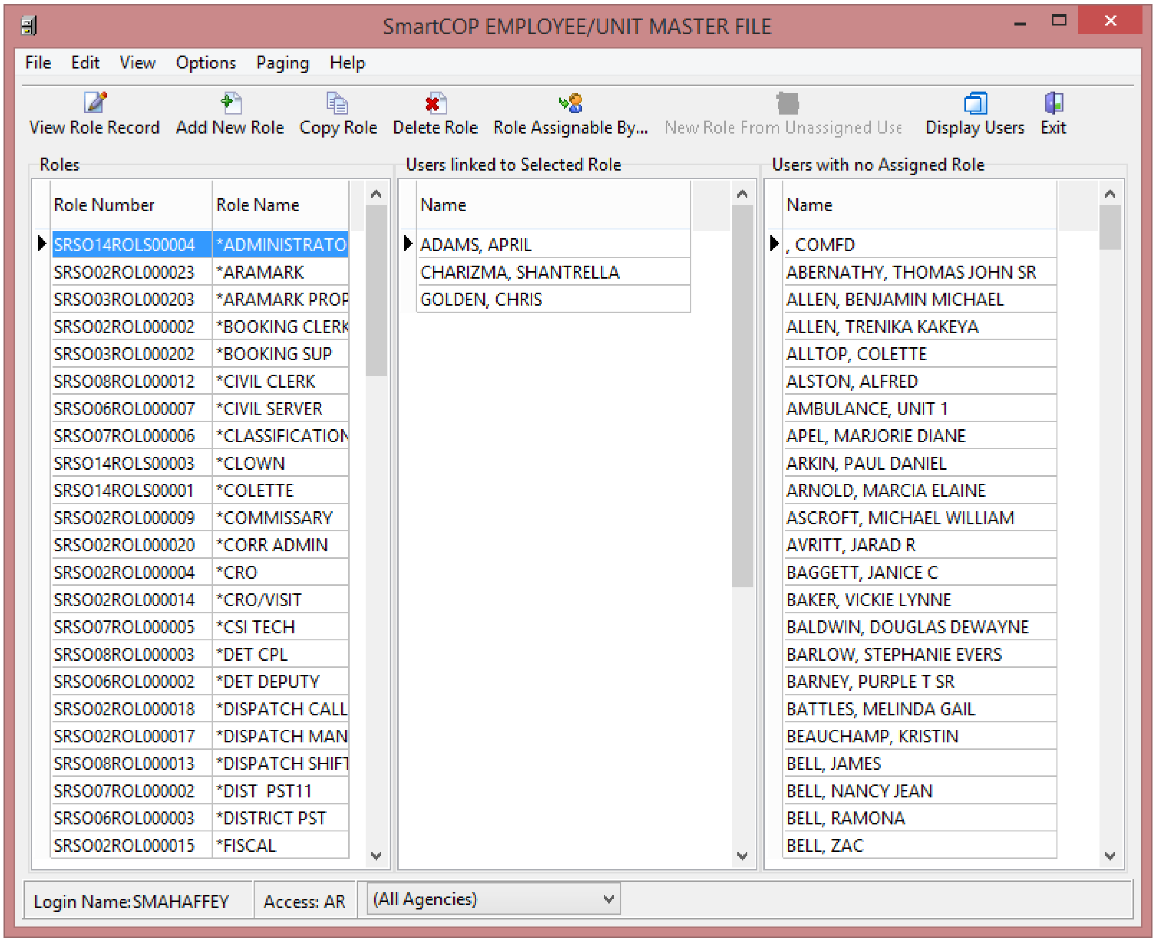
2. Click on the **File** menu, highlight **Print**, and then click on **Employee Record**.
3. Review the report using the *Print Preview* window.
4. Click the **Print** icon at the top left to print the report.
5. Click **Close** when printing is complete.

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.

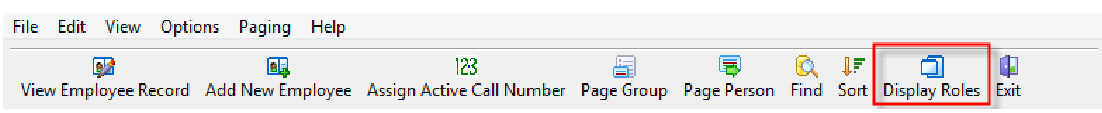
Managing Roles



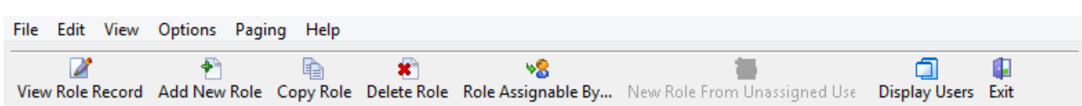
Roles are used within *Employee Master* to assign the same permissions to multiple users. When the permissions on a role are updated, all users assigned to that role are automatically updated.

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.



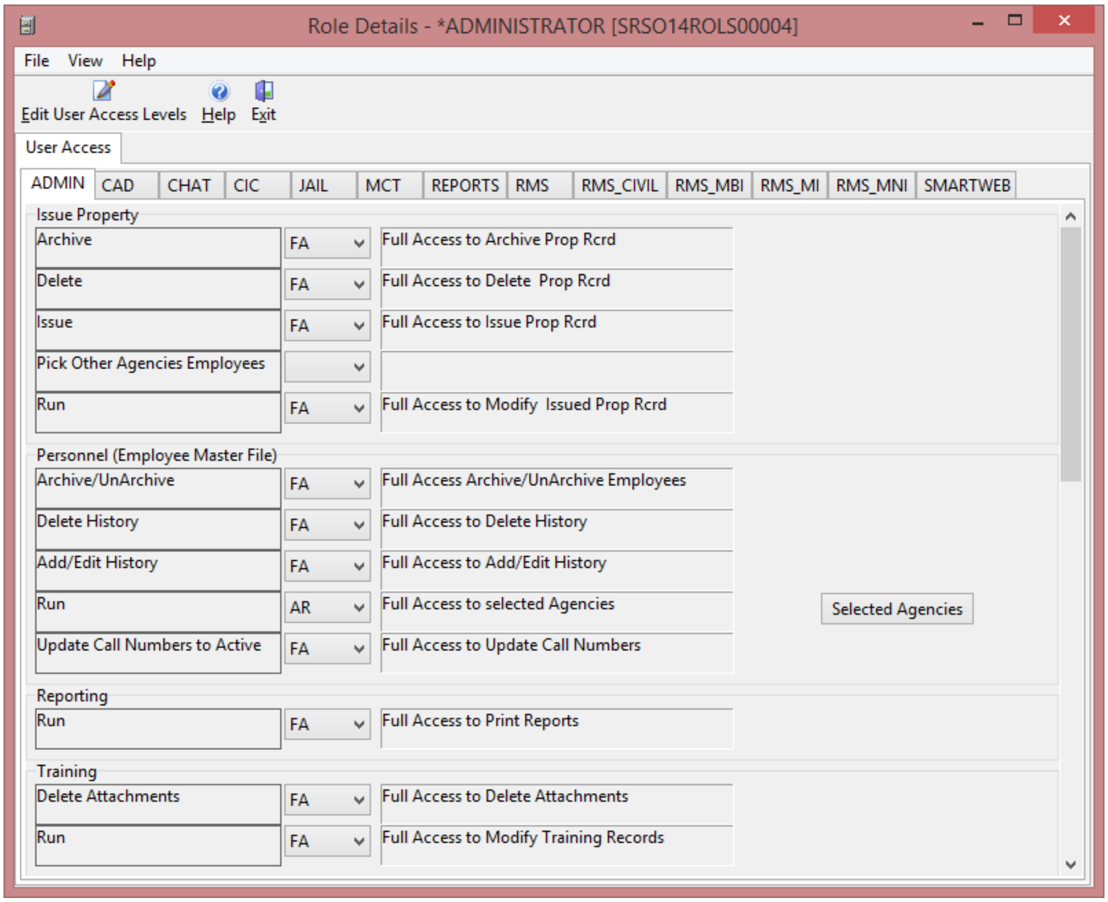
After the display is changed to show configured roles, the button text changes to *Display Users* to allow switching back to view the employee listing.



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.



Only *User Access* settings are available for roles. For more information, refer to [Managing User Access].

Adding Roles

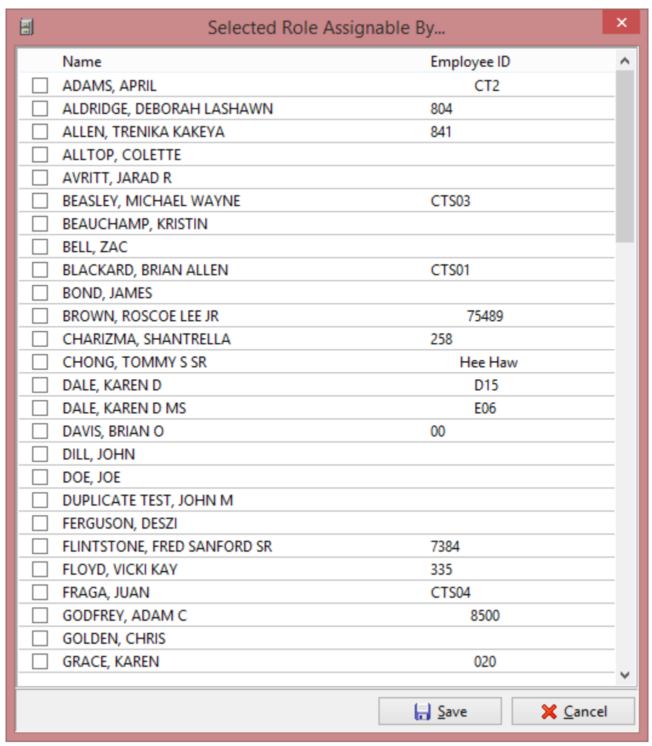
There are three methods for adding a new role to *Employee Master*, each represented by a button in the top toolbar.

- **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.



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.

Run

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. *Add* and *Edit* options are available on the *History* tab.

Run

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 *Employee Master*. **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 *Employee Master*. Records without pictures, including roles, are inaccessible.
LA	Access to view any record with a pictures in *Employee Master*. Records without pictures, including roles, are inaccessible.
RA	Access to view only the main *Employee Master* window and perform searches
RG	Access to view only the main *Employee Master* window and send group pages
SA	Access to view any record with a picture and a unit assignment in *Employee Master*. Records without a picture or a unit assignment are inaccessible.

XX	No Access. *Employee Master* application is inaccessible.

- ✓ 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 *Training* application
LA	Read-only access to record in the *Training* application.
XX	No Access. The *Training* application is inaccessible.

Updater

Access Updater Administrator

Y	Permission granted to access application
N	Access denied to application

Can Modify Updates

Y	Permission granted to add and modify updates
N	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

Run

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
N	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
N	Access denied to SmartChat

CIC

State CIC

Run

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.

Run

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

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

Run

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

MCT

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).

MCT

- **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 access to run SmartReports
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. *Report Scheduler* 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)

Run

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 *Evidence*. 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

Run

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 permits
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 *Permit* 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

Run

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

Run

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 *Offense* and *Arrest*. 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

FA	Full access to add and modify criminal subpoenas
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
XX	No 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

FA	Full access to add, edit, and delete addresses in MNI records
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 (*Features*) information in MNI records
LA	Read-only access to physical characteristics (*Features*) information
XX	No Access. Physical characteristics (*Features*) 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 (*Nicknames*) 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

CTS America™

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**.

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Table of Contents

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

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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*.

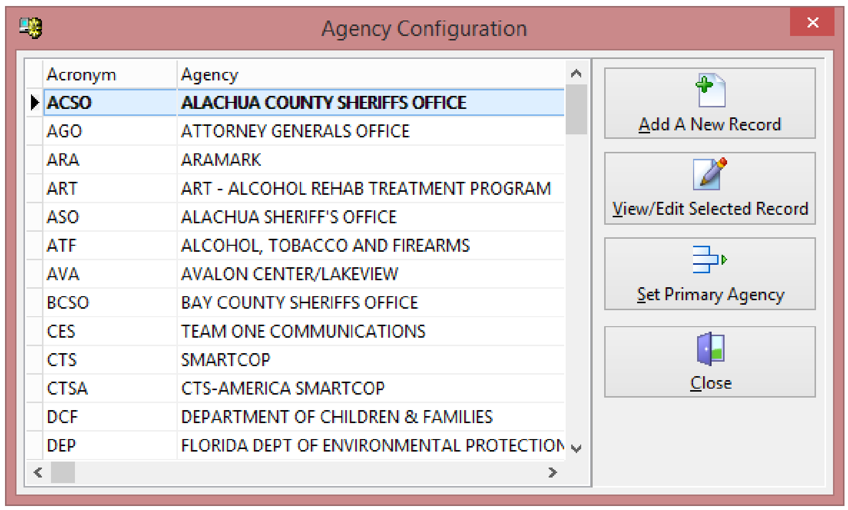
Agency Setup

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

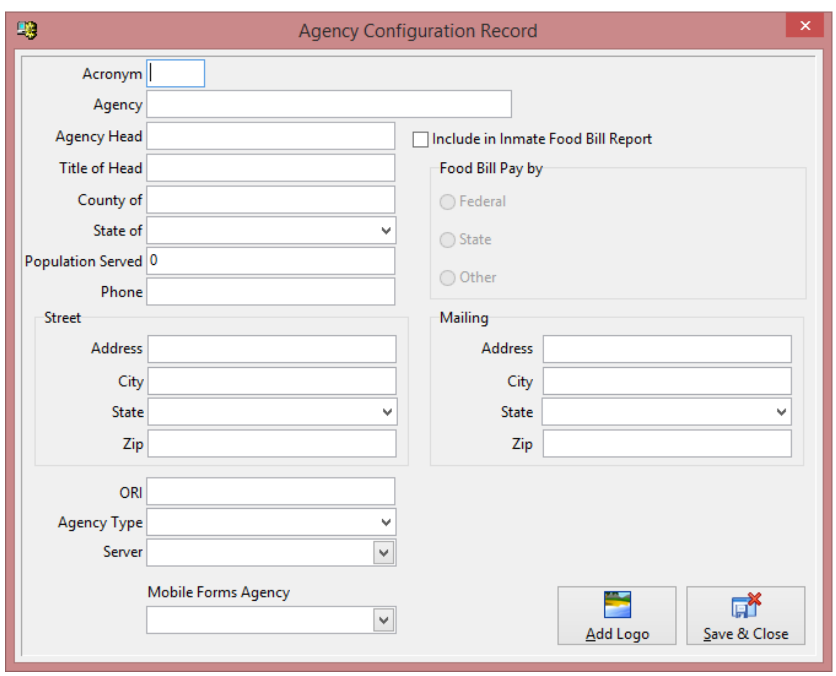
Agency List

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**.



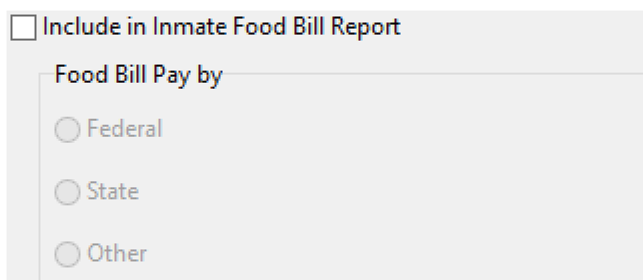
2. Click on **Add A New Record**.



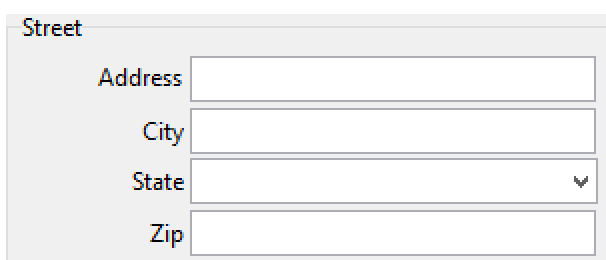
3. Enter an agency **Acronym**.

   ✓ 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.
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.

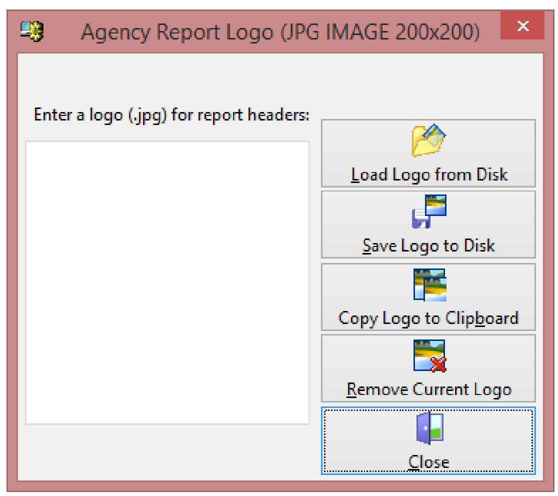


12. Enter agency's street address, including the **Address**, **City**, **State**, and **Zip**.



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



    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**.

TIPS

✓ If this is the primary agency record, set the logo from the [*Primary Agency Logo (JPG)*] 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:
  - o Place the JPG file within the ADM directory where MastCfg.exe resides.
  - o 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.

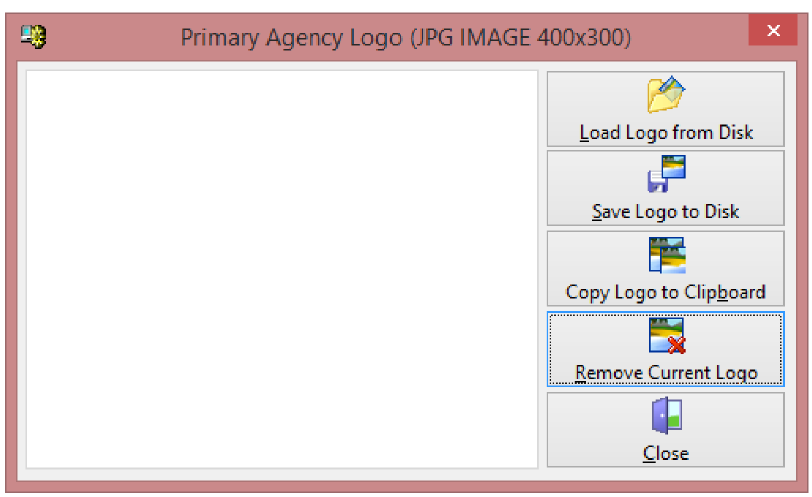
19. Click **Save & Close**.

- ✓ 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.

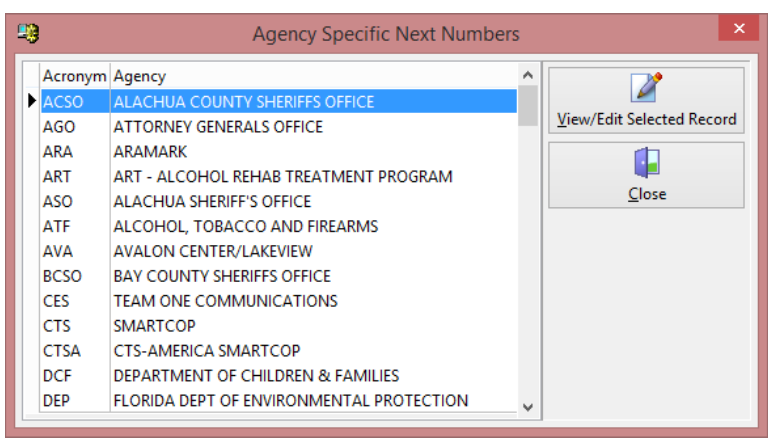
- ✓ To ensure access to the logo from all applications, it is highly suggested to do the following:
  - o Place the JPG file within the ADM directory where MastCfg.exe resides.
  - o Navigate to the directory and file using the UNC path (i.e. \\[Server]\[Share]\SMARTCOP.APP\ADM\).
- ✓ Click **Save Logo 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

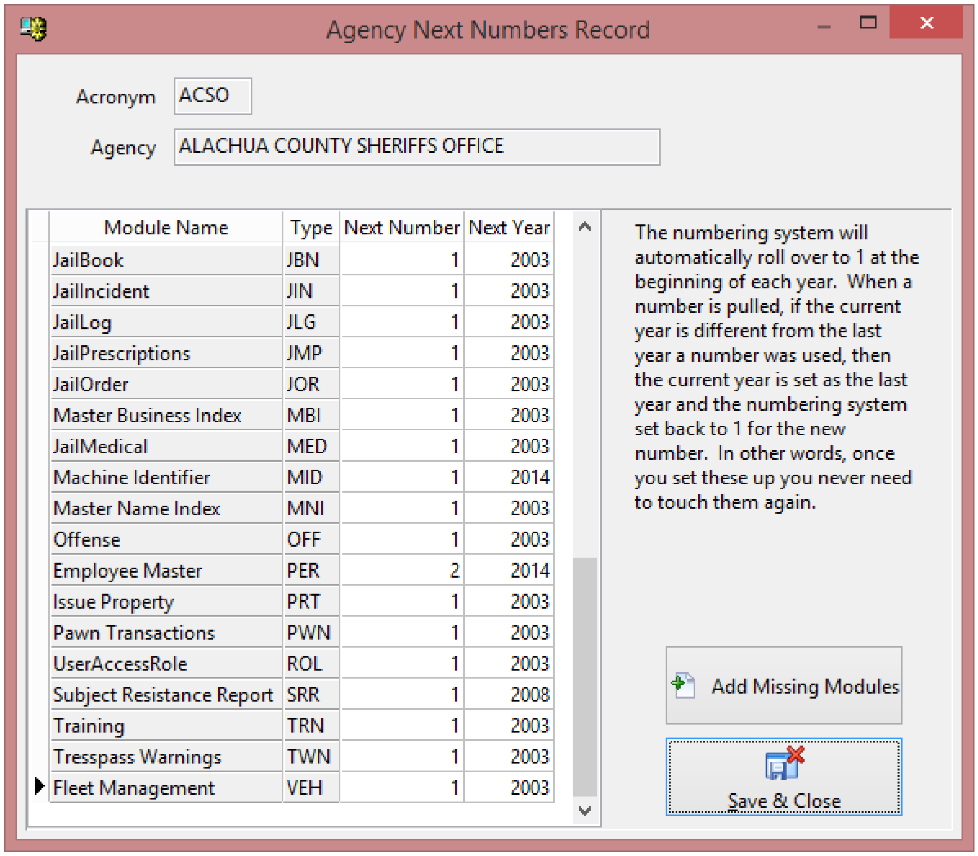
Master Configuration allows administrators to specify report number generation starting points. For example, if the paper system for offense reports ended at report number 1500, this console may be used to set the next electronic report to be 1501.

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**.



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.

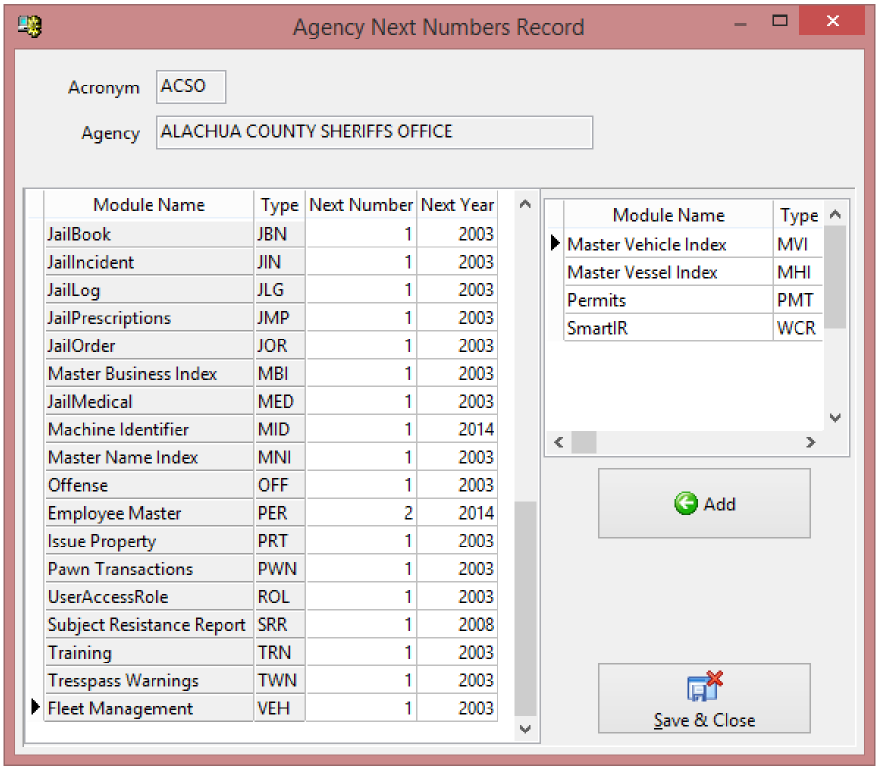
4. When finished, click **Save & Close**.

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.

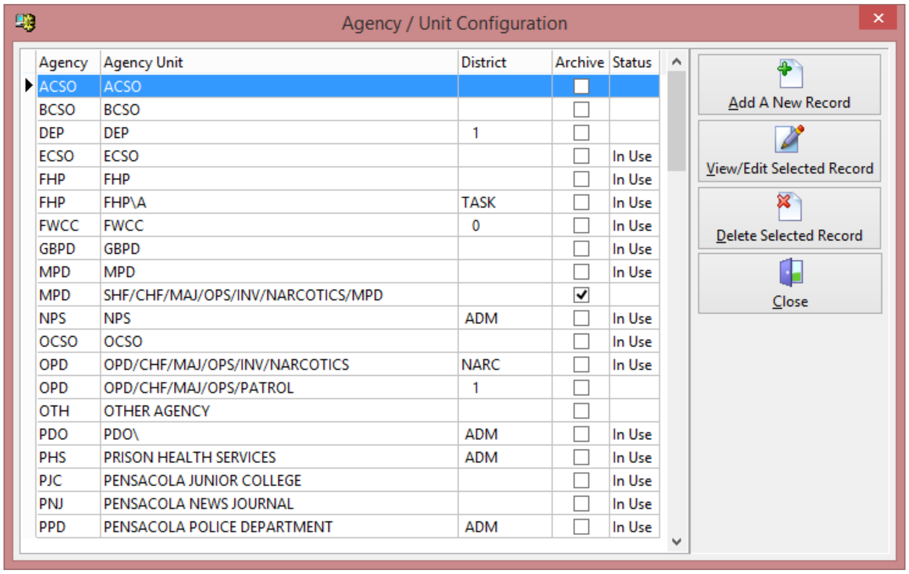


- Select the module to be added.
- Click Add.
- Use the steps above to set up the module's report numbers.

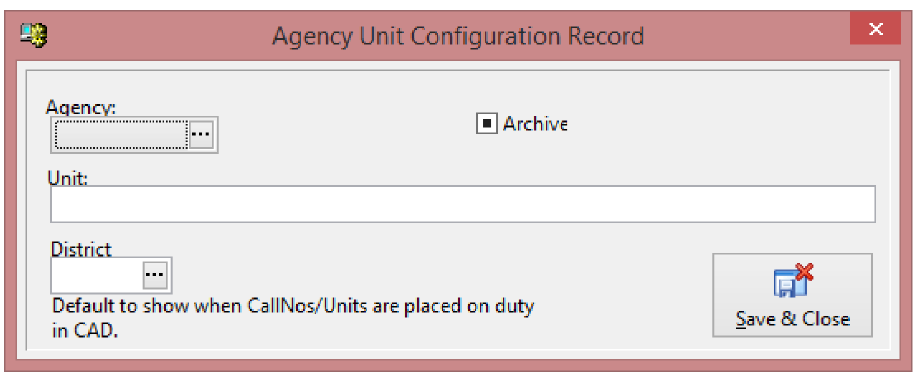
Agency Unit Configuration List

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**.



2. Click **Add A New Record**.



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.

   TIPS

   - ✓ 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.
   - ✓ 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**.

   TIPS

   - ✓ 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**.

TIPS

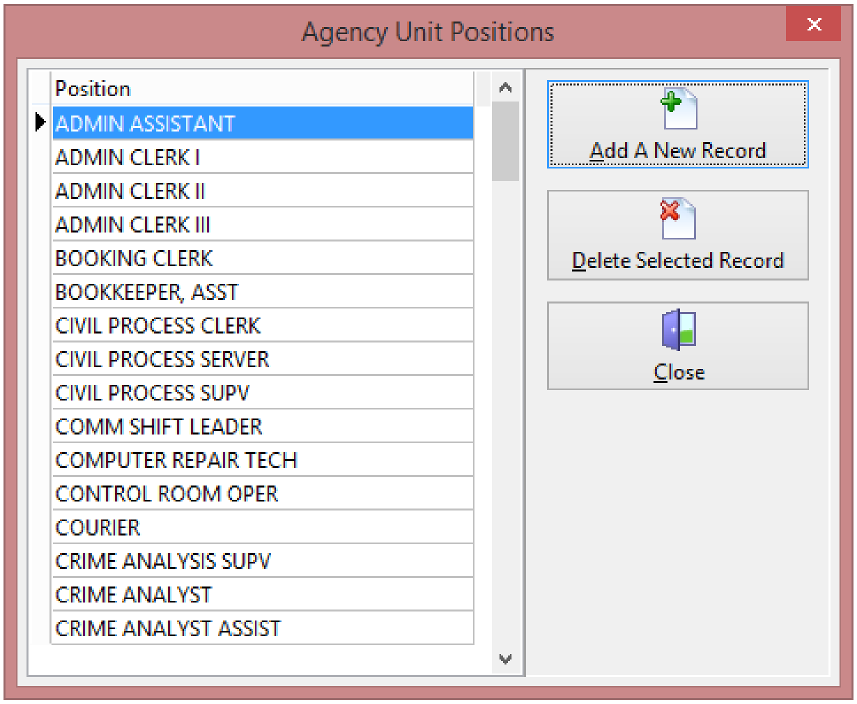
- ✓ To archive an agency unit that is not in use, place a check beside **Archive** within the unit record, and then click **Save & Close**.
  - o Any unit to which at least one unit is assigned cannot be archived.
  - o Employees cannot be assigned to archived units.
- ✓ To edit an existing agency unit, 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**.



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**.

TIPS

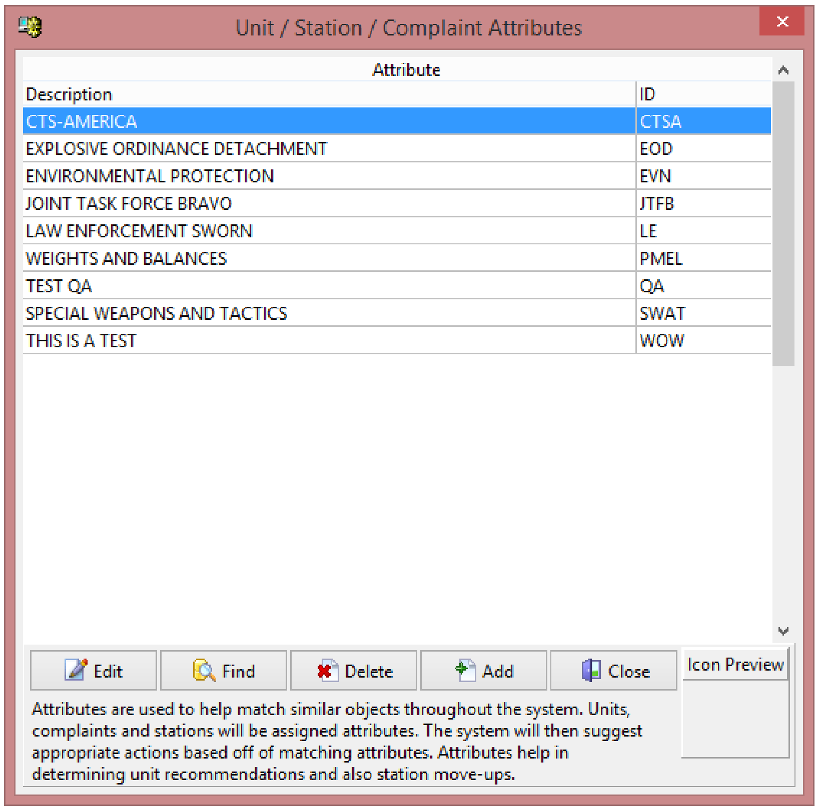
- ✓ To edit an existing agency unit position record, double-click the record in the unit position list. The position name can be directly edited in the list.

- ✓ 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**.

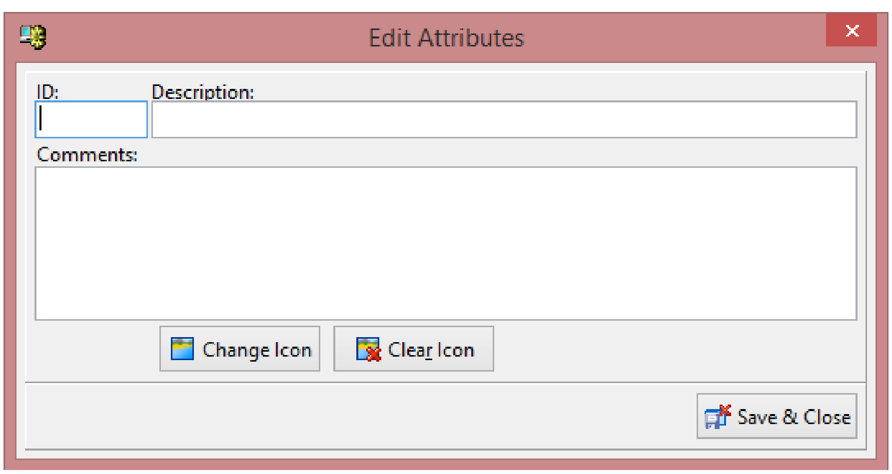
Agency Unit, Station, and Complaint Attributes

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**.



2. Click **Add**.



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**.

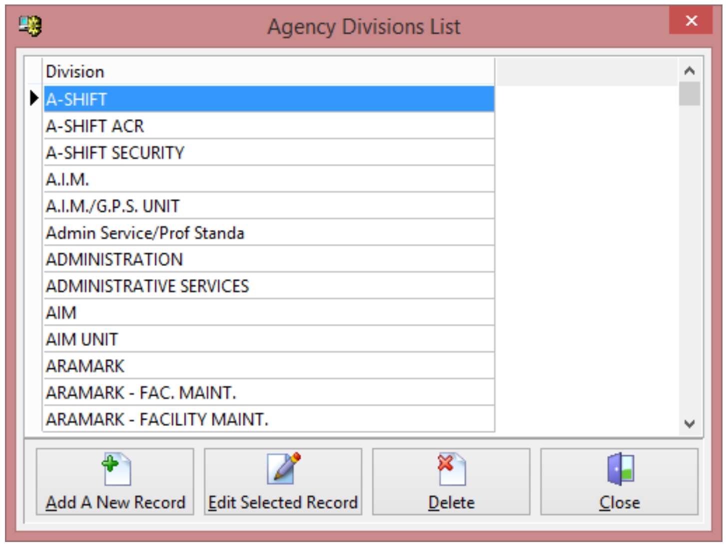
TIPS

- ✓ To edit an attribute, double-click the record or highlight it and click **Edit**.
    - o 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.
    - o 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.

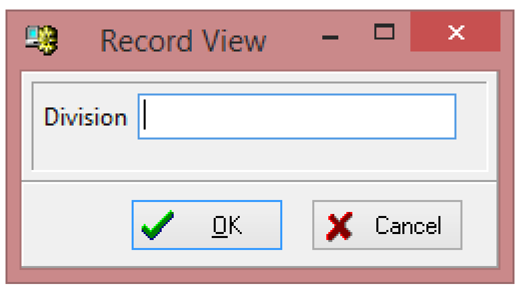
Agency Divisions List

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**.

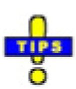


2. Click **Add New Record**.



3. Enter the **Division** name and click **OK** or press **[Enter]**.

4. When finished, click **Close**.

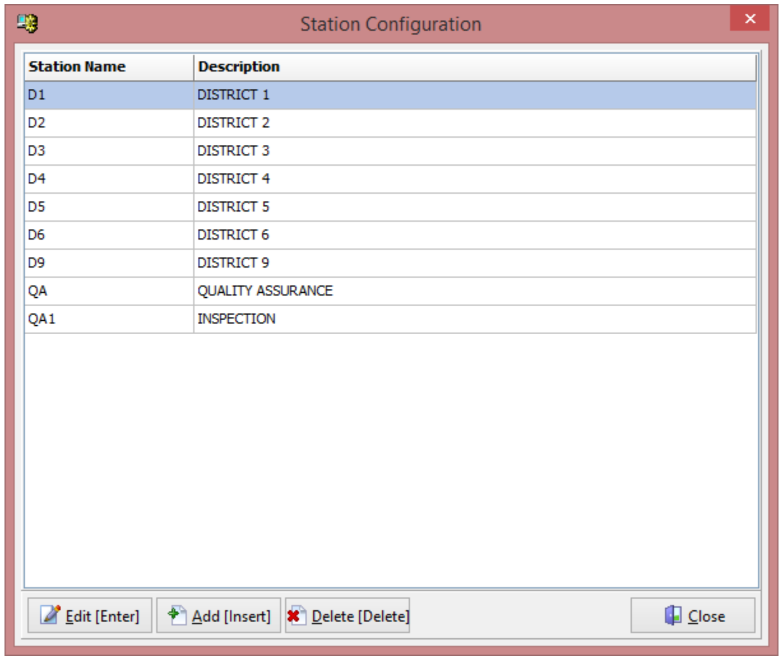


- ✓ To edit an existing record, highlight the desired division, and then click **Edit Selected Record**.
- ✓ Division names that are currently in use cannot be modified.
- ✓ To delete an existing division, highlight the division and click **Delete**. Press **[Y]** or click **Yes** to confirm the deletion.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

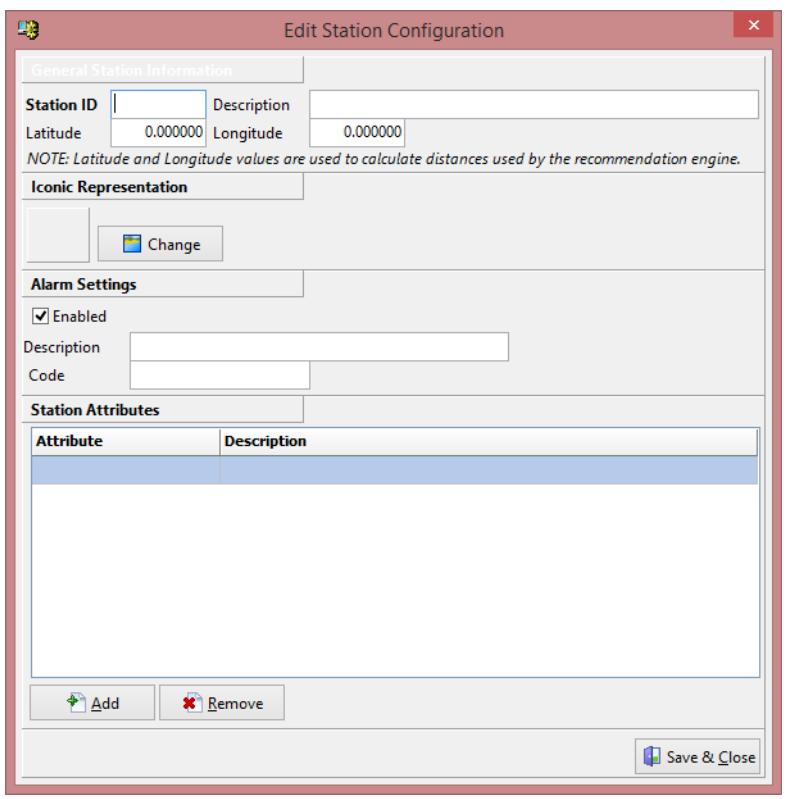
Station Configuration

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

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



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



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 Agency Unit, Station, and Complaint Attributes.

7. When finished configuring the station, click **Save & Close**.

8. When finished working with *Station Configuration*, click **Close**.

TIPS

✓ To edit an existing station record, double-click the record or highlight it and click **Edit**.

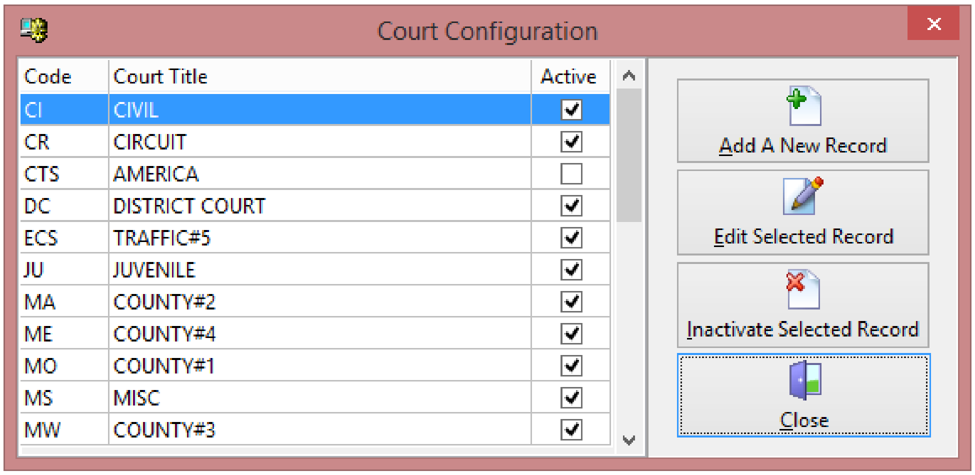
✓ To delete a station from the list, select the desired station and click **Delete**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **No**.

✓ 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.

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



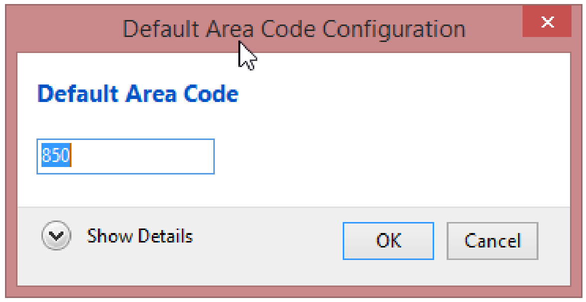
2. Click **Add A New Record**.
3. Enter the court **Code** and **Court Title**. The *Active* check box is selected by default.
4. Click **Close**, when finished.

- ✓ 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**.



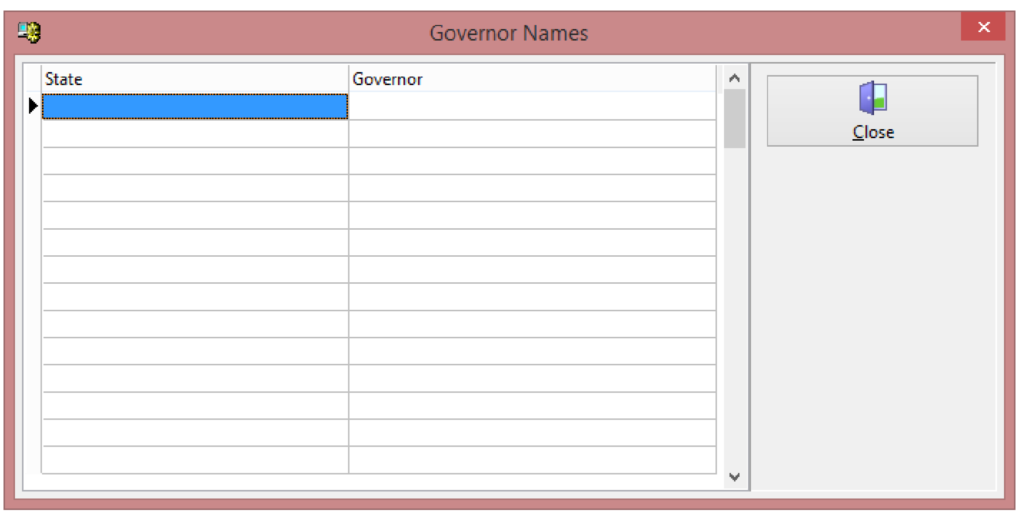
2. Enter the **Default Area Code**.

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**.



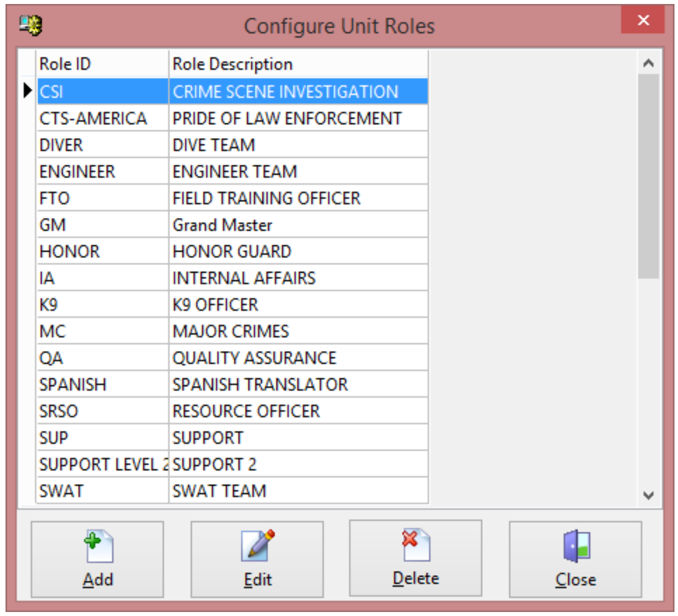
2. Scroll through the list to find the state or territory to be updated. Records are in alphabetical order.

3. Once the state has been found. Double-click in the *Governor* column to change the governor listed.

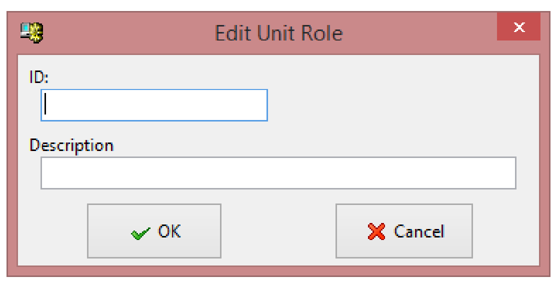
Unit Roles

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**.



2. Click **Add**.



3. Enter a unique role **ID** and **Description**.

4. Click **OK**, when finished entering role information.

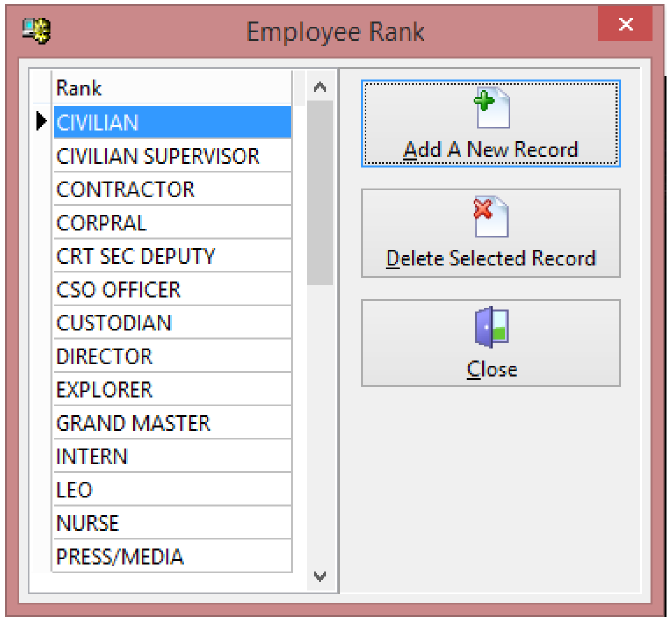
5. When finished working with unit roles, click **Close**.

✓ 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.

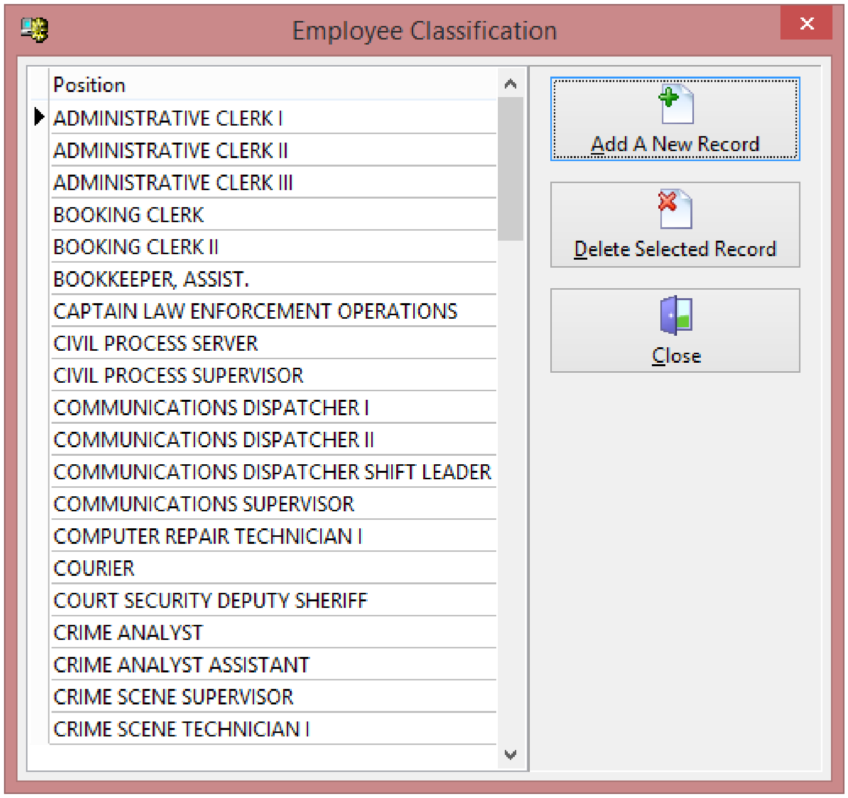
✓ To edit an existing rank record, double-click the desired rank in the list.

✓ 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**.



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**.

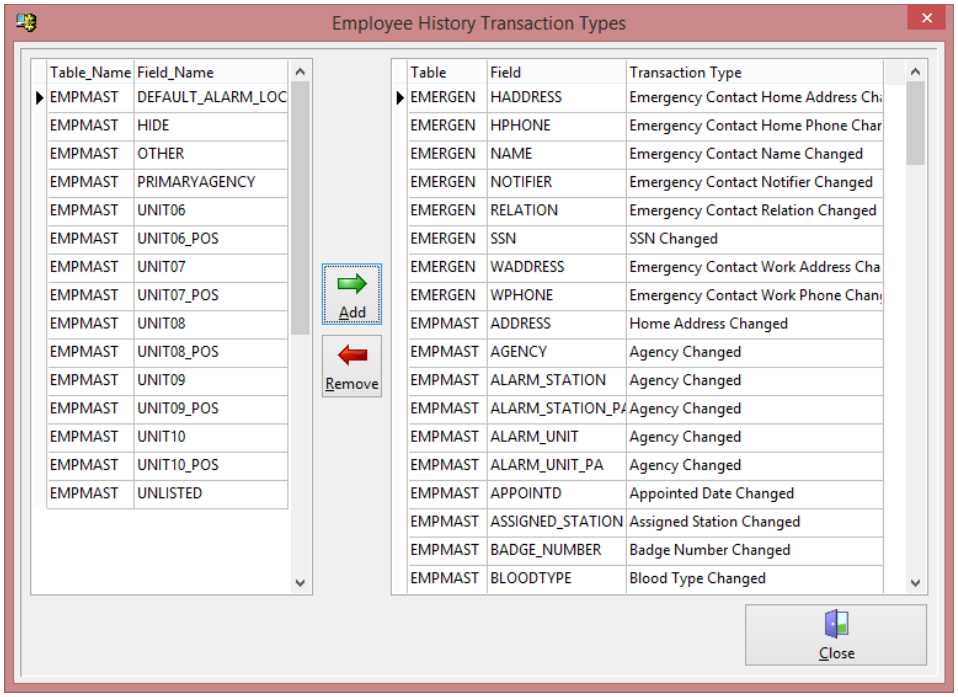
TIPS

- ✓ 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**.



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.

TIPS

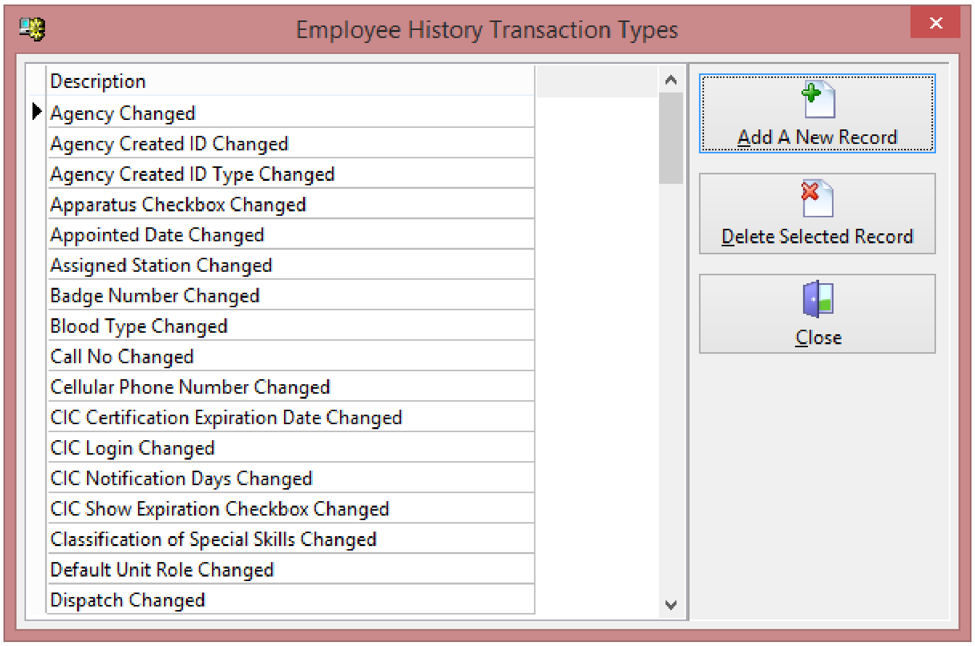
- ✓ To remove a field from being tracked in history, select the field in the list on the right, and click **Remove**. That field will, then move to the list on the left.

- ✓ A transaction type must be selected for each field. The window cannot be closed until all fields have a transaction type selected.

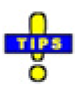
Employee History Transaction Types

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**.



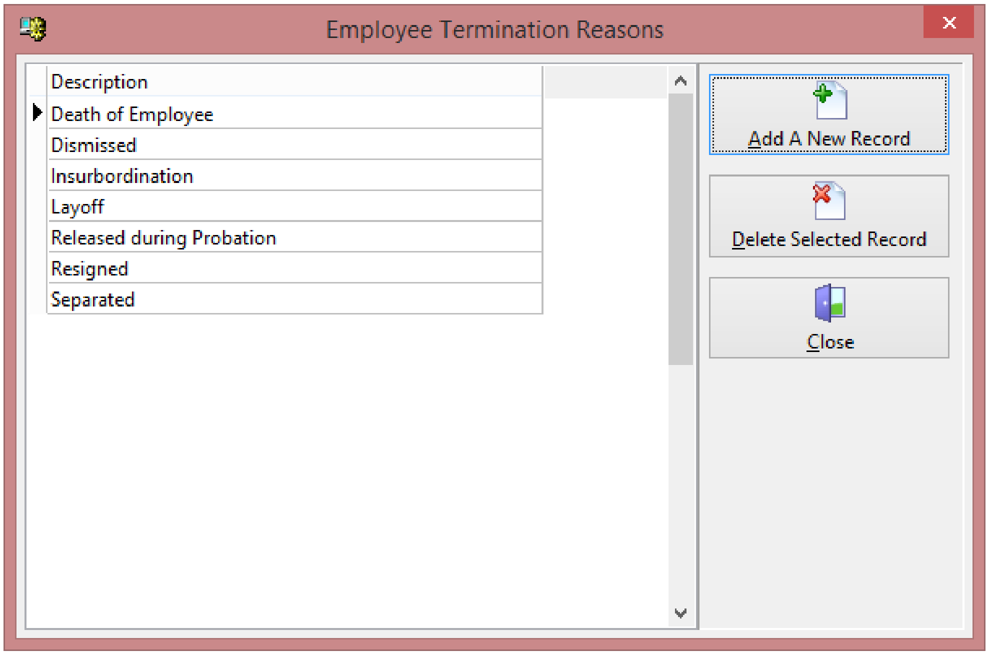
2. Click **Add A New Record**. A new record is added at the bottom of the list.
3. Enter a unique *Description*.
4. Click **Close** when finished.



- ✓ 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**.



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.

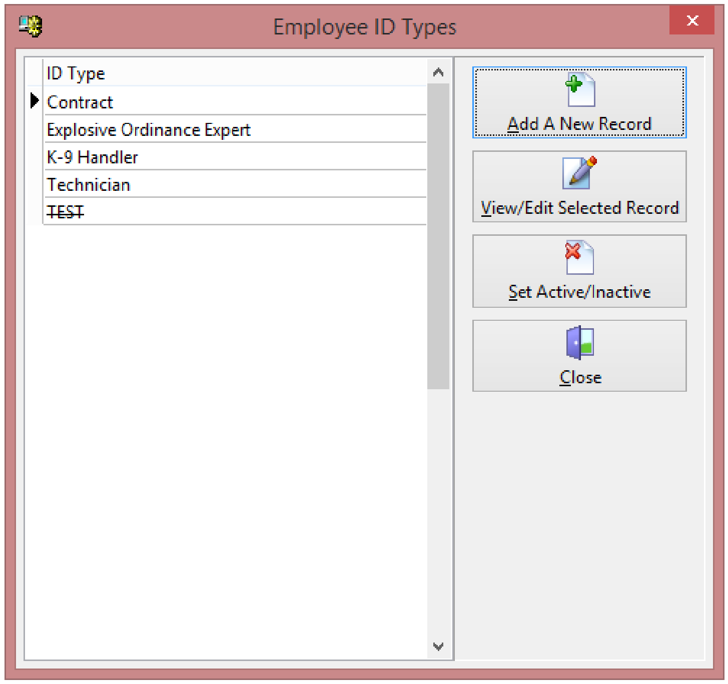
TIPS

- ✓ 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**.

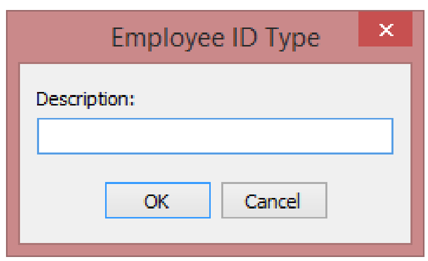
Employee ID Types

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**.



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

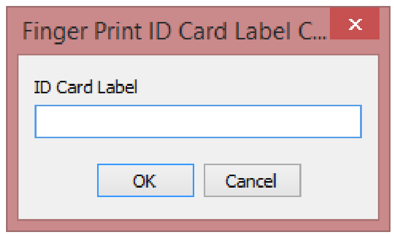
✓ Employee ID types are active immediately upon creation. Click **Set Active/Inactive** to toggle the record status between active and inactive.

- ✓ 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**.

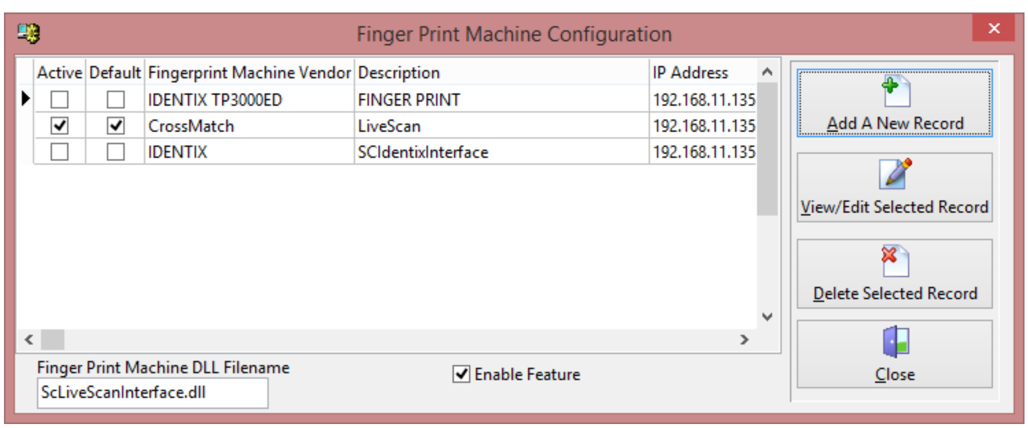


2. Enter the **ID Card Label**.
3. Click **OK**.

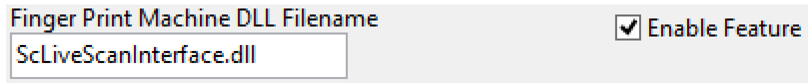
Finger Print Machine List

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**.



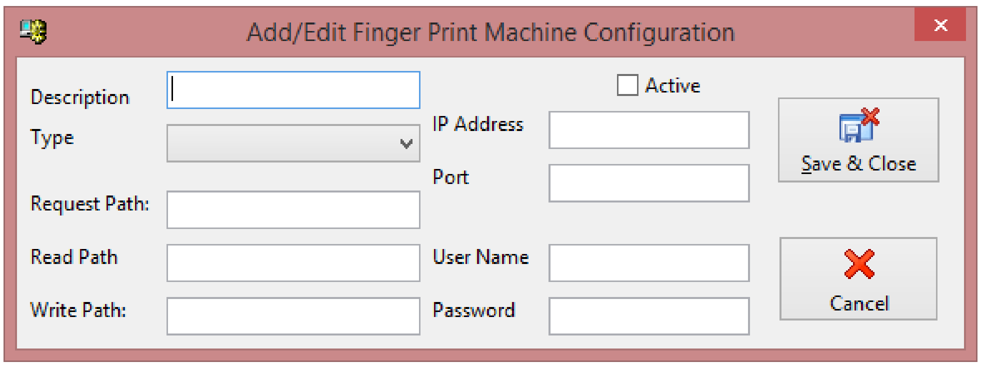
2. Enter the settings to allow sending demographic information to the fingerprint interface from the Master Name Index (*Options>Send Demographics to Finger Print Machine* in *Master Index*).



   a. Enter the **Finger Print Machine DLL Filename**.

   b. Place a check beside **Enable Feature**.

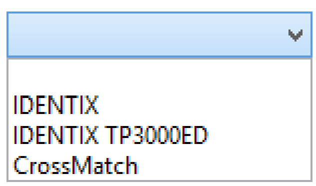
3. Click **Add A New Record**.



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.



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

TIPS

- ✓ 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.
   - IP Address
   - Port
   - User Name
   - Password
   - Request Path
   - Read Path

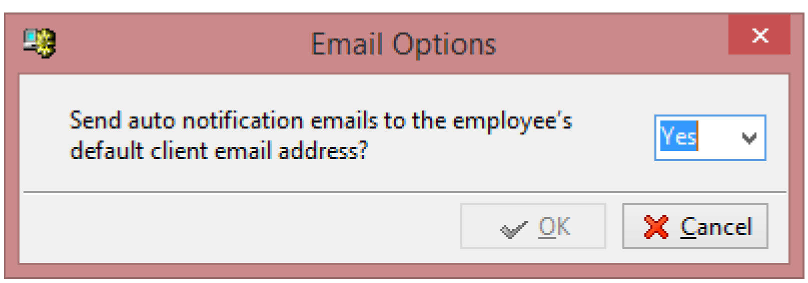
8. When finished adding a machine, click **Save & Close**.
9. When finished adding fingerprint machines, click **Close**.

TIPS

- ✓ 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**.

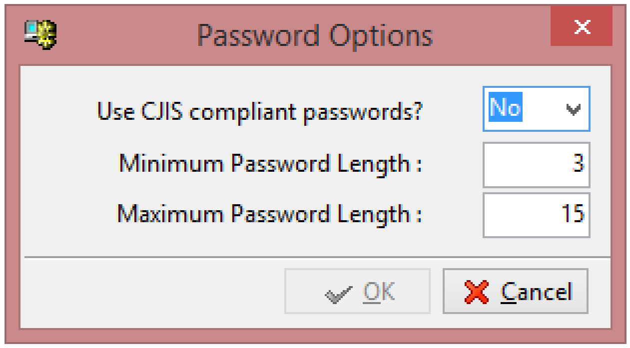


2. Use the drop-down list to indicate if automatic notification e-mails should be sent to the employee's default client e-mail address.
3. Click **OK** when finished.

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**.



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

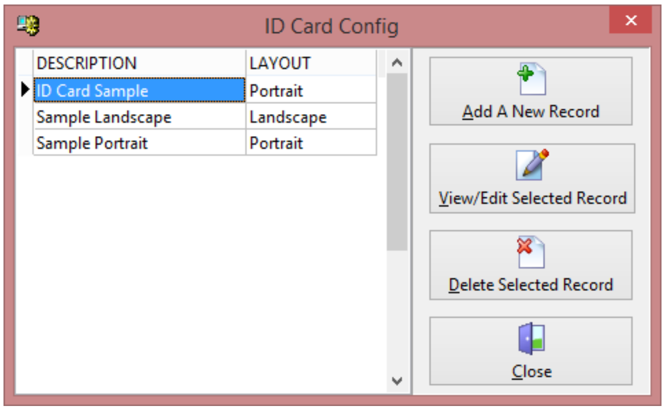
- Passwords cannot contain the "@" symbol.
- Minimum Password Length: 8
- Maximum Password Length: 15
- Invalid Password Options:
    - User Name
    - Password
    - Drowssap
- The password cannot be a dictionary word in any language.

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

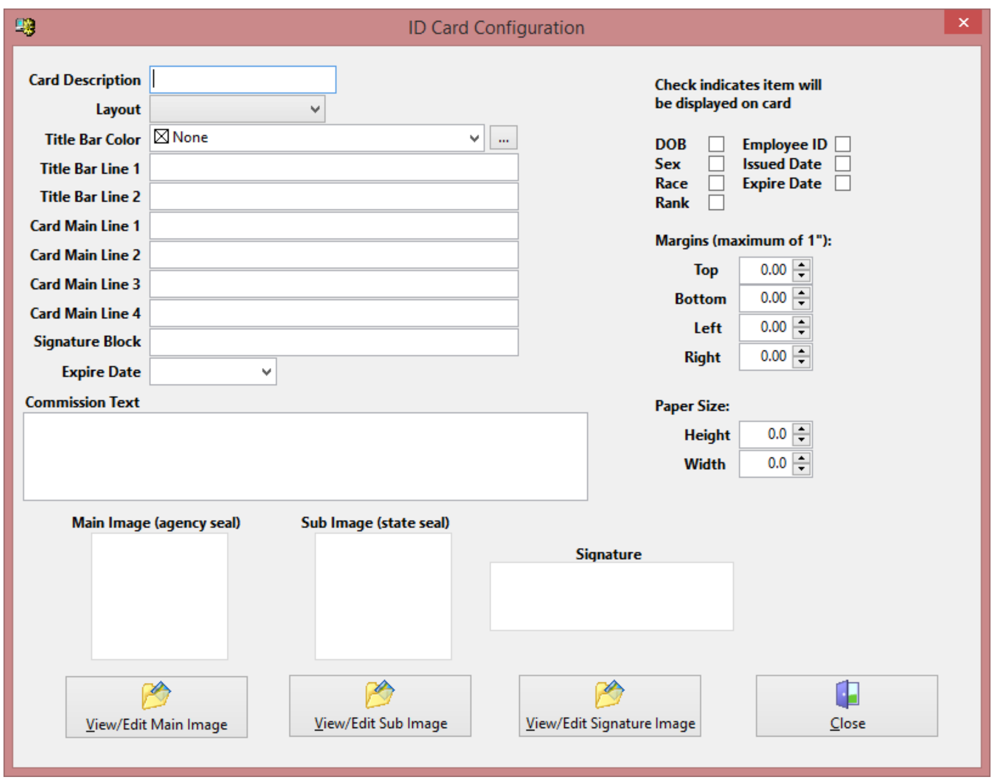
ID Cards

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**.



3. Enter a unique **Card Description**.

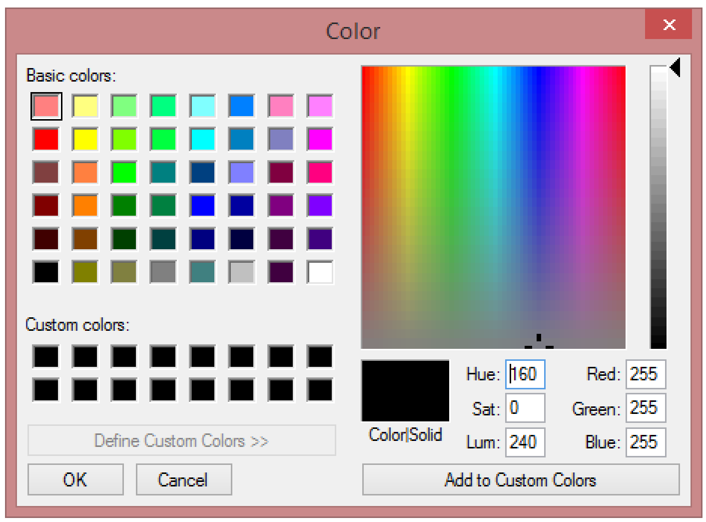
4. Select the **Layout** of the ID (*Portrait* or *Landscape*) from the drop-down menu.

5. If desired, choose a **Title Bar Color** from the drop-down menu or using the ellipsis (**…**) to the right.

TIPS

- ✓ Color selection is not limited to the 20 colors immediately available in the drop-down 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**.

7. 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.

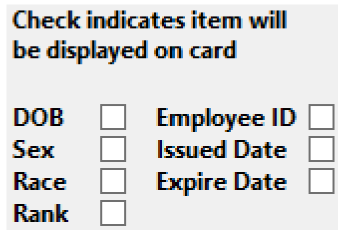
   b. The contents of *Card Main Line 2*, *Card Main Line 3* and *Card Main Line 4* appear consecutively on the ID below the employee's name.

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.

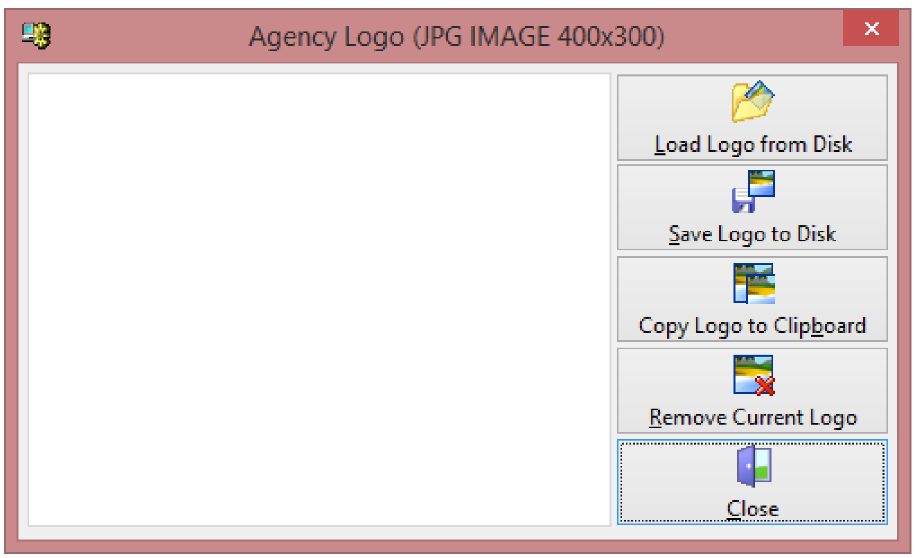


12. Enter the top, bottom, left and right margins (up to 1”).

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.

    TIPS

    ✓ 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**.

    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.

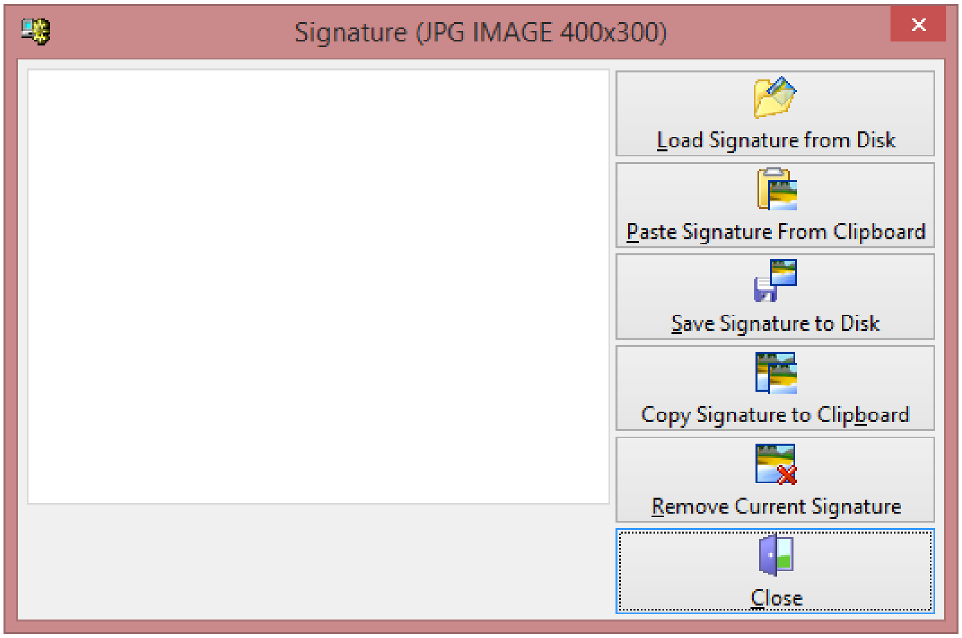
✓ Click **Save Logo to Disk** to save a copy of the current logo to the local computer, a USB drive, or a network location.

✓ 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**.



    b. Click **Load Signature from Disk**.

    c. Navigate to the desired JPG file on the local computer, a USB drive, or a network location.

    TIPS

    ✓ 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.

TIPS

✓ 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.

TIPS

- ✓ 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**.

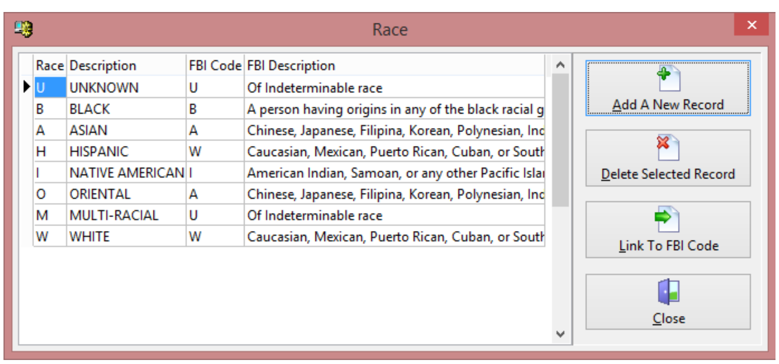
Miscellaneous Lists

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.

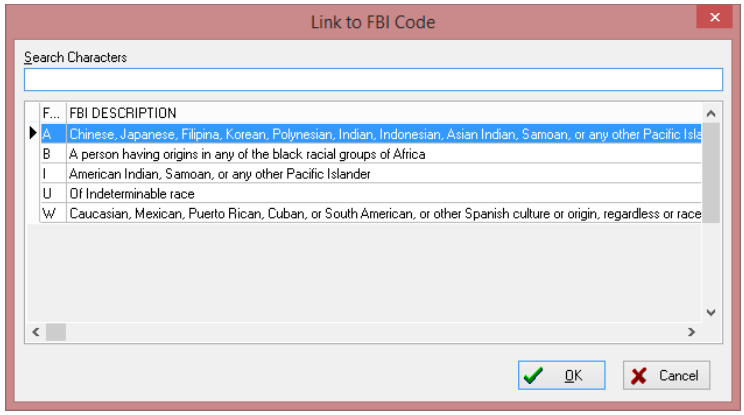
Race options must be mapped to a valid FBI description to be utilized in UCR-reported incidents.

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**.



   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**.

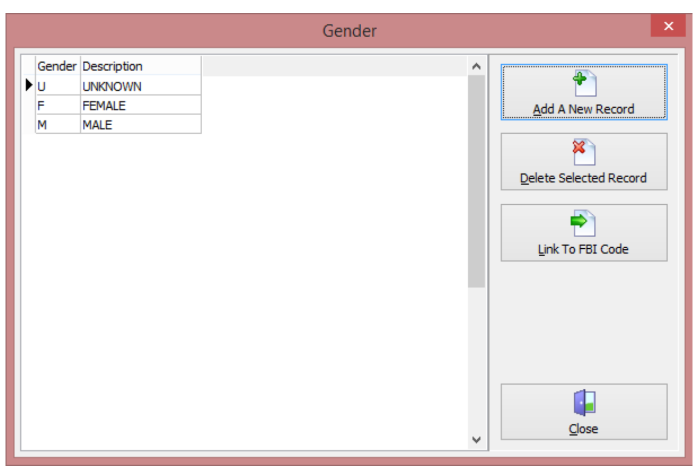
6. When finished, click **Close**.

- ✓ 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**.

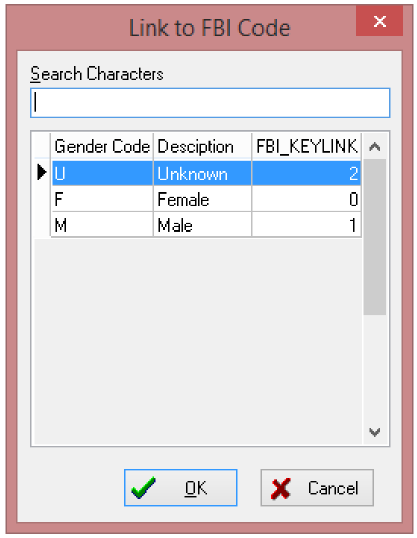
Gender (Sex) List

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**.



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.



   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**.

TIPS

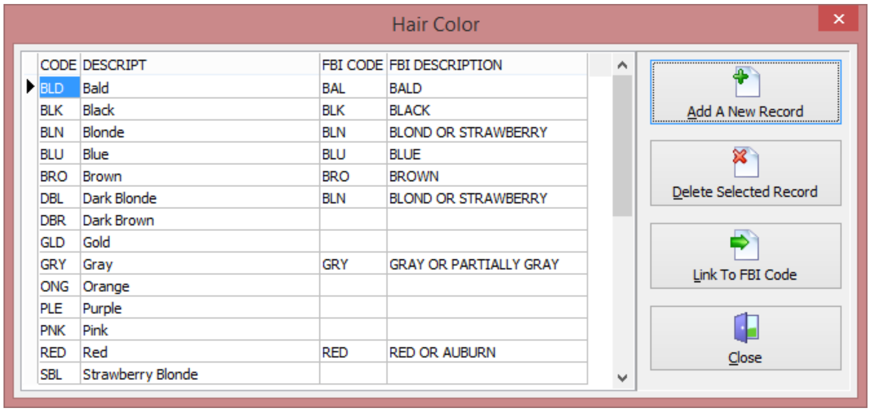
✓ To edit an existing gender record, double-click the record.

✓ 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.

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

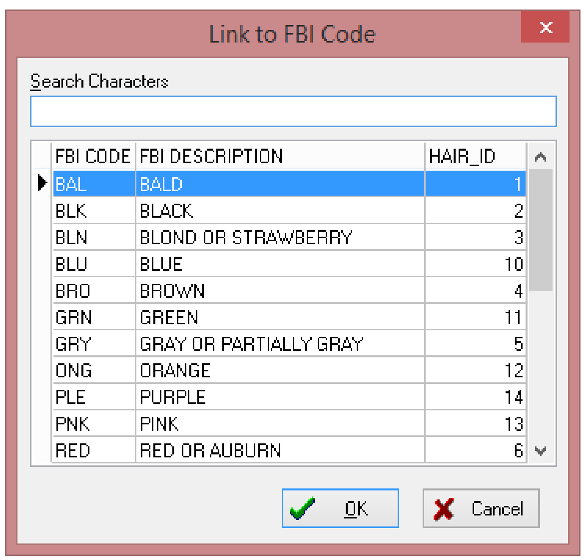


2. Click **Add A New Record**. A new record is created at the bottom of the list.

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.



   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**.

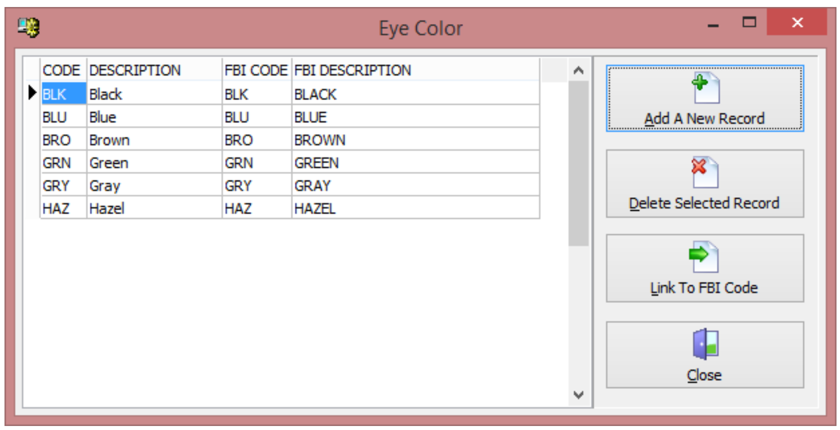
6. When finished, click **Close**.

- ✓ 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**.

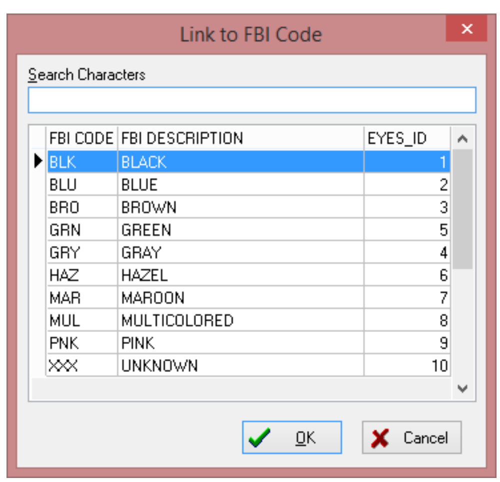
Eye Color List

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**.



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.



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**.

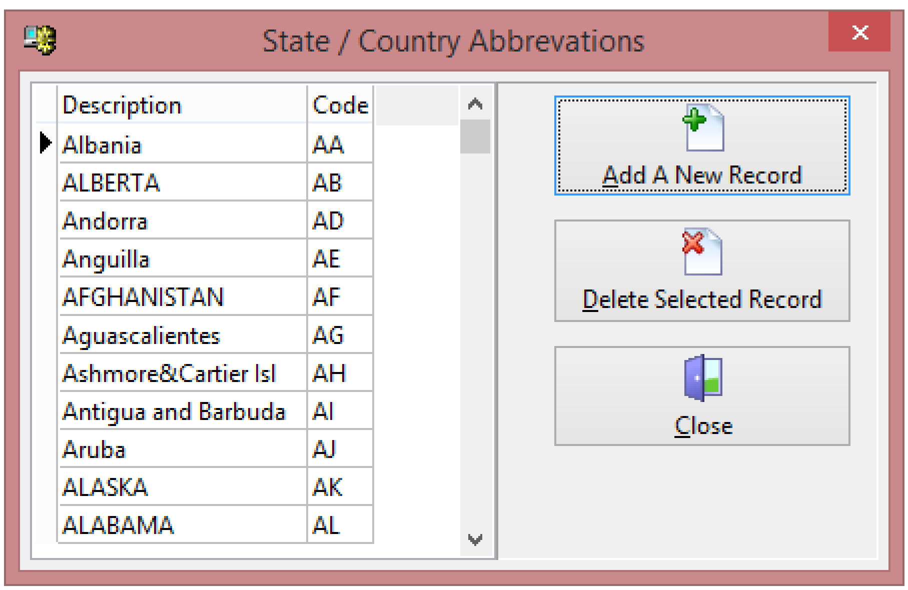
TIPS

- ✓ 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**.



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**.

- ✓ 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.

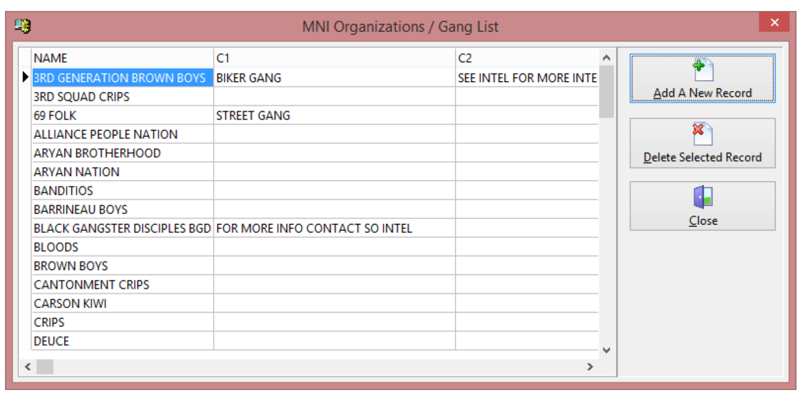
MNI

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**.



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**.

- ✓ 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**.

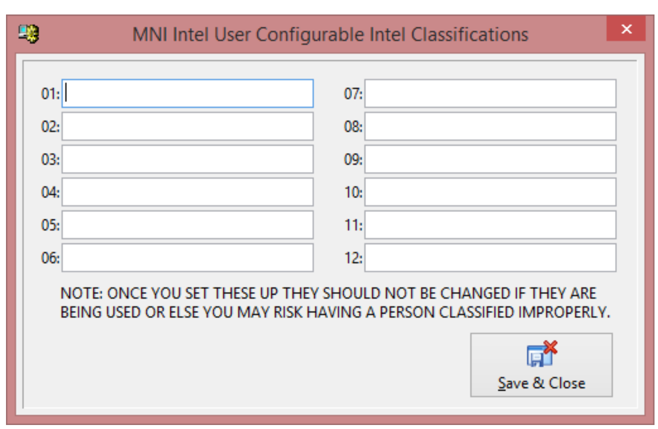
MNI Intel Classification Setup

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.

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

• 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	

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



2. Using fields *01* through *12*, enter the names of any desired intel flags.

3. When finished, click **Save & Close**.

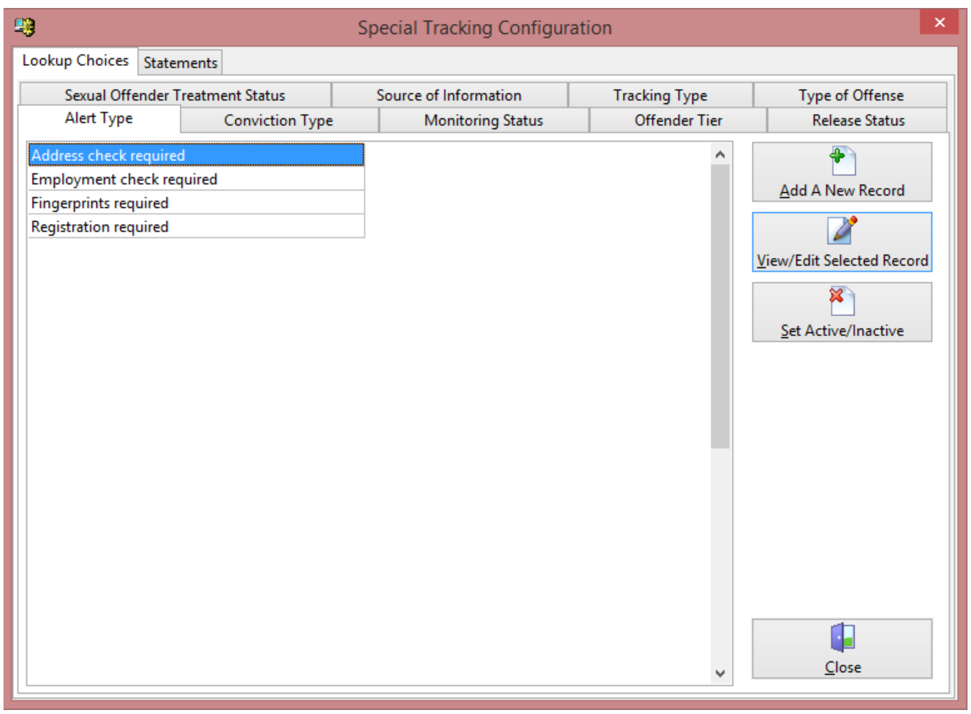
✓ Once a custom intel flag has been configured, it should not be changed, except in the case of spelling errors, as it may be in use on MNI records.

✓ Custom intel flags are listed on MNI records immediately following the default flags.

Special Tracking Configuration

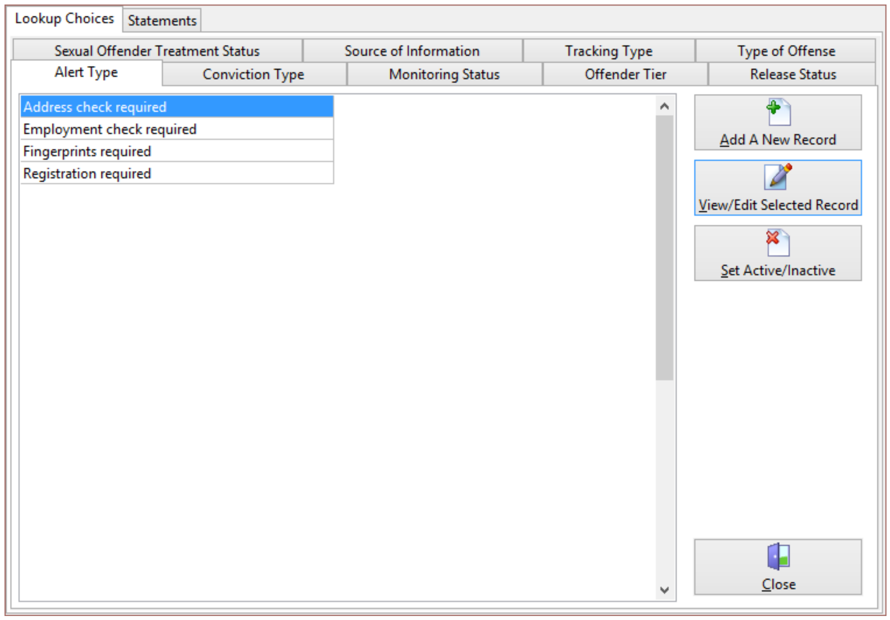
The *Special Tracking Configuration* console allows administrators to customize the items tracked in the *Special Tracking* section of Master Name Index records.

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



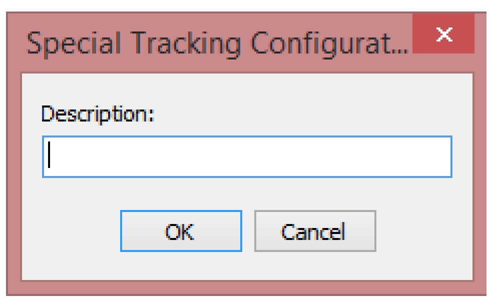
Lookup Choices

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.



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

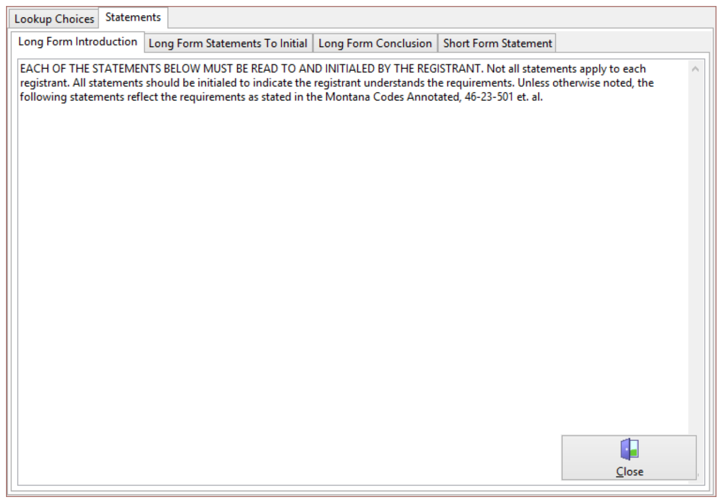
1. Click **Add New Record**.



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**.

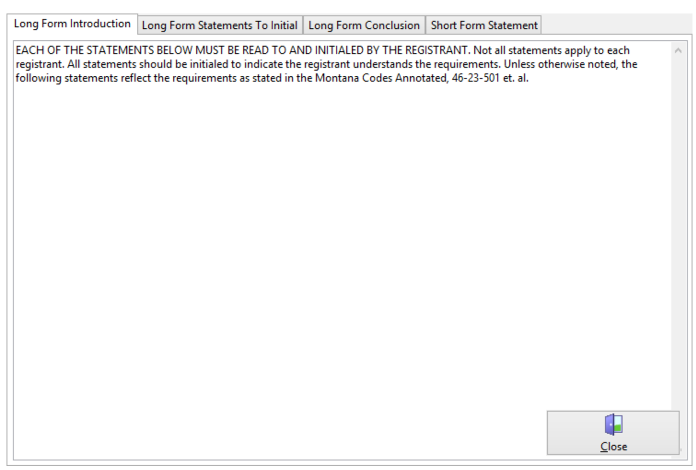
- ✓ To edit an existing lookup choice, double-click it or highlight it and click **View/Edit Selected Record**.
- ✓ Lookup choices cannot be deleted, but they can be disabled. Select the lookup choice to be modified and click **Set Active/Inactive**.
- ✓ An inactive lookup choice is marked with a line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

Statements

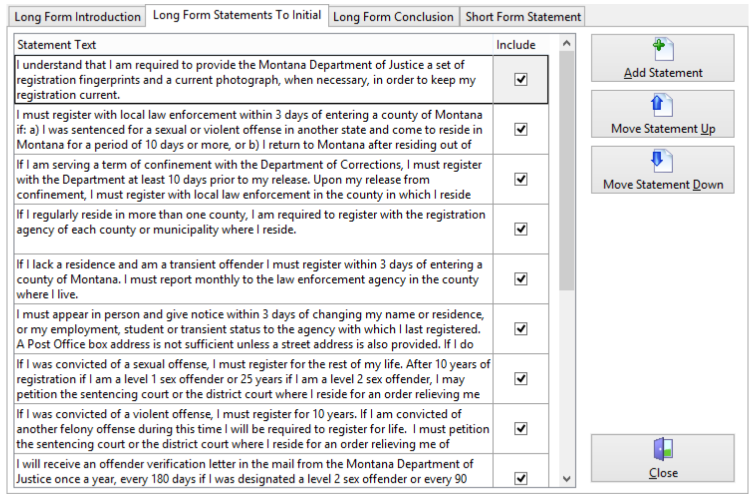


The *Statements* tab is used to configure the specific text that appears on the forms presented to persons subject to special tracking. Four tabs are used on a long form:

- *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.

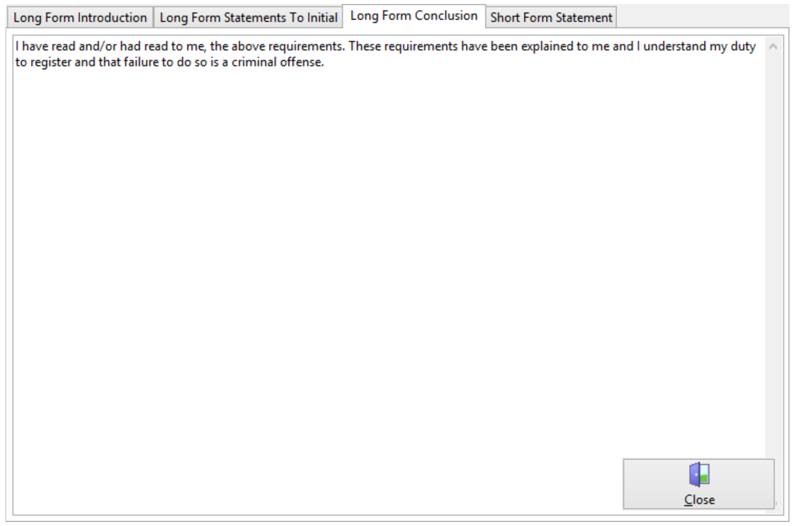


  - **Add Statement**: Add a new statement to the list.
  - **Move Statement Up**: Move the currently selected statement up in the list.
  - **Move Statement Down**: Move the currently selected statement down in the list.

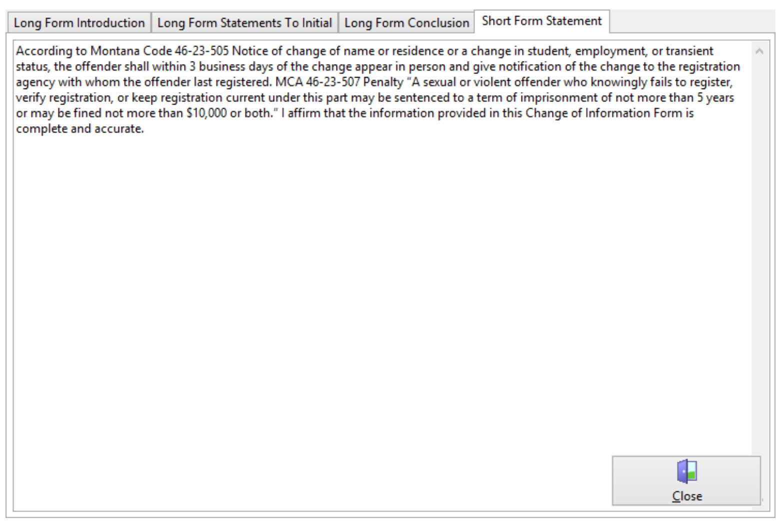
TIPS

- ✓ 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.

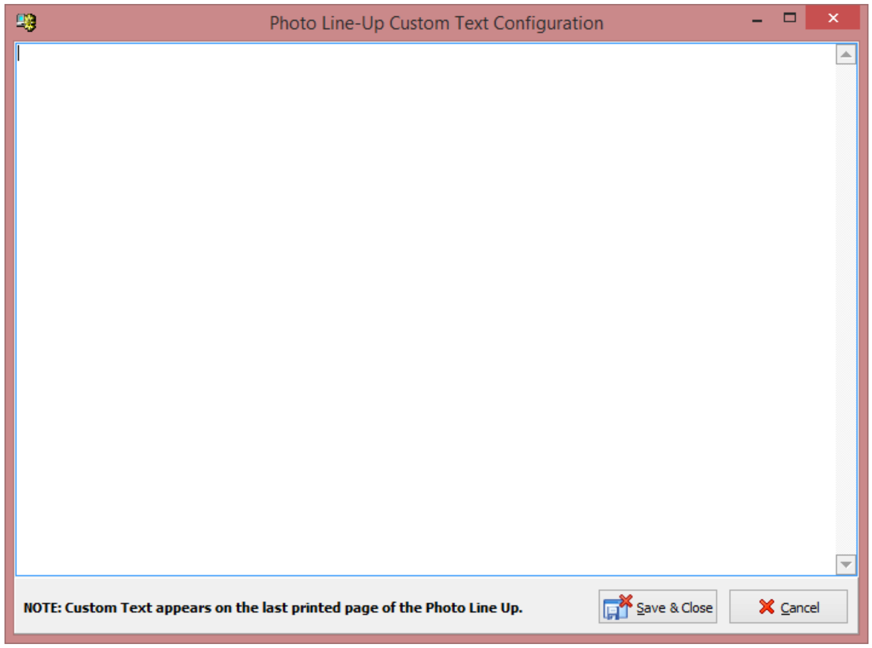


When finished working with the *Special Tracking Configuration*, click **Close**.

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**.

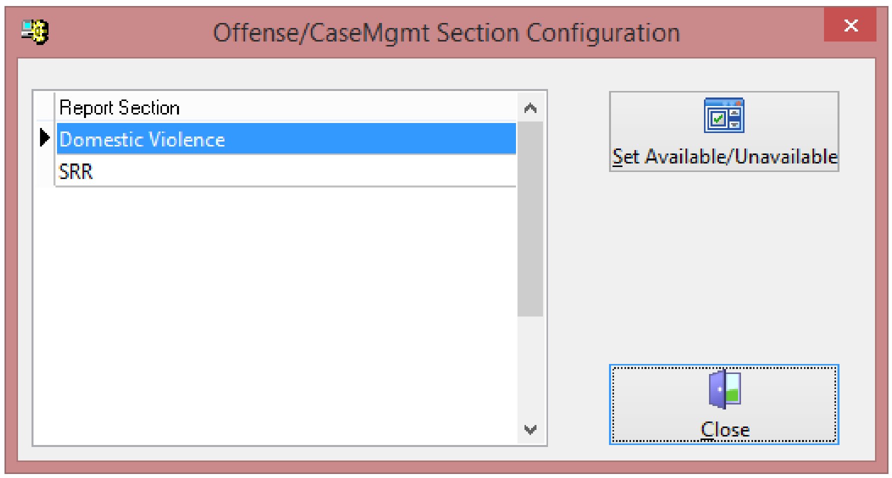
Offense and Case Management

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

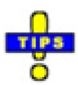
Report Configuration

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 double-clicking it or highlighting it and clicking on **Set Available/Unavailable**.



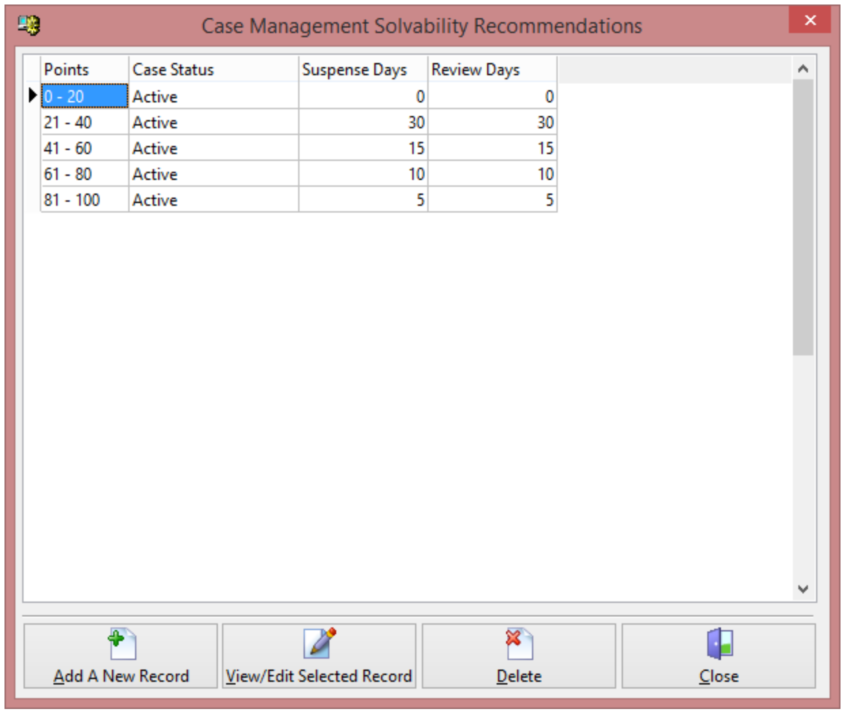
✓ A report section that has been disabled is flagged by a strikethrough going through the section name (~~Report~~).

3. When finished, click **Close**.

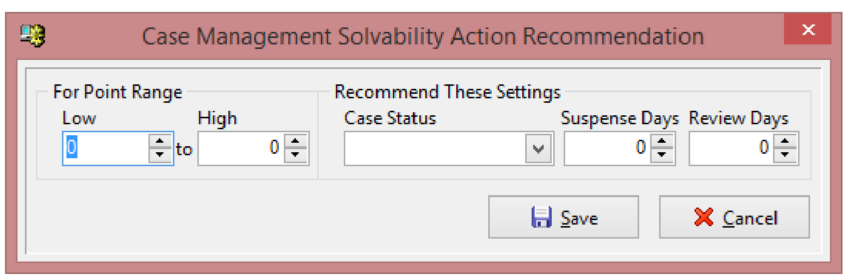
Case Management Solvability Recommendations

A case's potential solvability is determined by a series of questions configured under *Case Management Solvability Questions*. 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 *Case Management Solvability Recommendations* for specific ranges of total point values.

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



2. Click **Add A New Record**.



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**.

TIPS

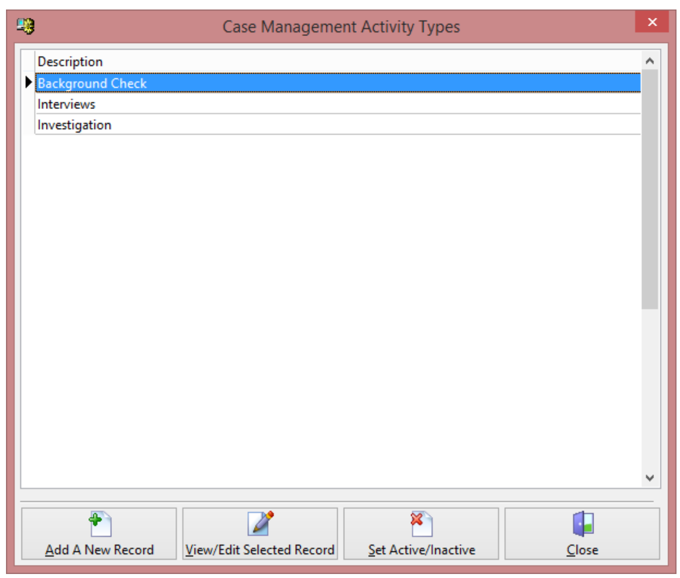
- ✓ To modify an existing recommendation, double-click the record or highlight it and click on **View/Edit Selected Record**.

- ✓ To delete a recommendation, highlight the record and click on **Delete**.

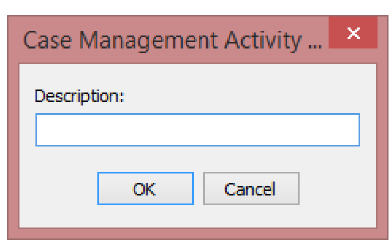
Case Management Activity Types

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**.



2. Click **Add A New Record**.



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**.

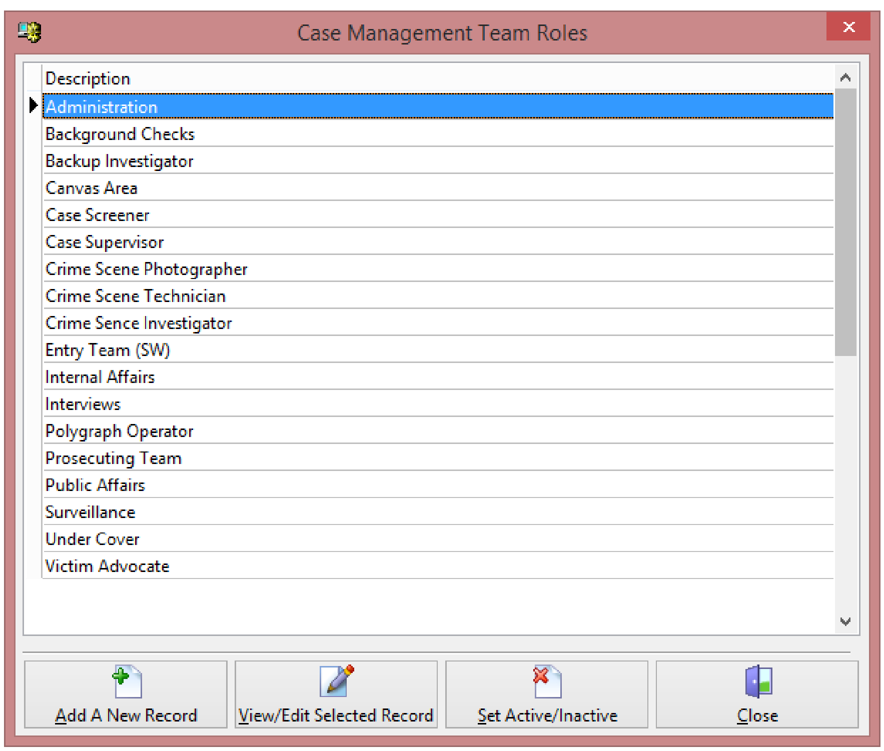
- ✓ Activity types cannot be deleted, but they can be disabled. Highlight the activity type to be changed and click on **Set Active/Inactive**.

- ✓ An inactive activity type is denoted by a strikethrough over the description (~~Activity~~).

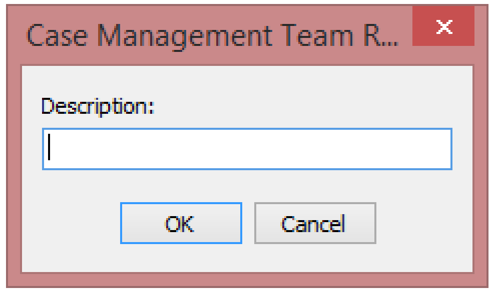
Case Management Team Roles

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**.



2. Click **Add A New Record**.



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**.

TIPS

✓ 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.

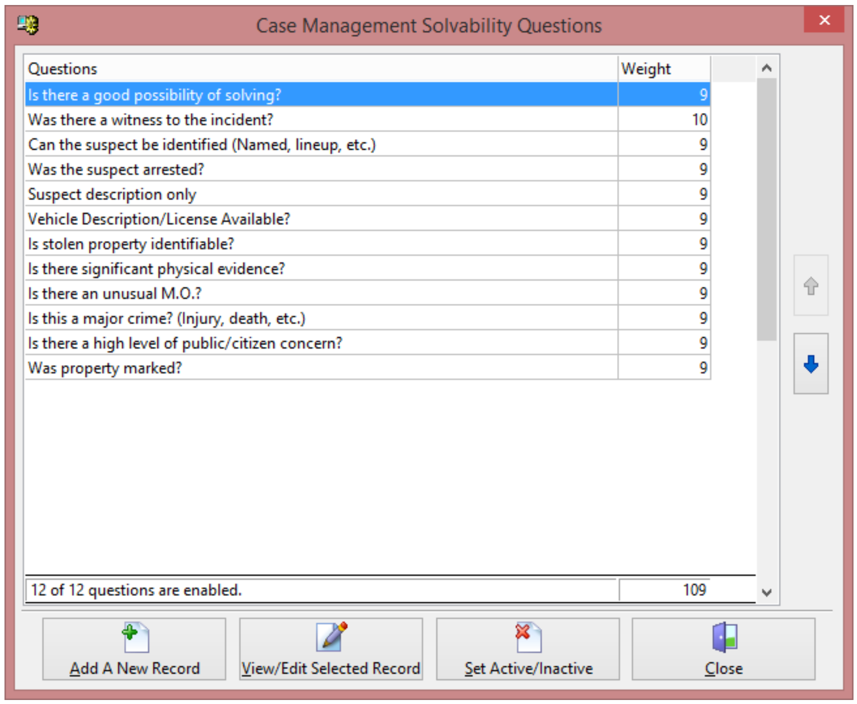
✓ Inactive roles are moved to the bottom of the list and are flagged by a strikethrough on the role name (~~Team Role~~).

✓ To modify an existing team role record, double-click it or highlight it and click on **View/Edit Selected Record**.

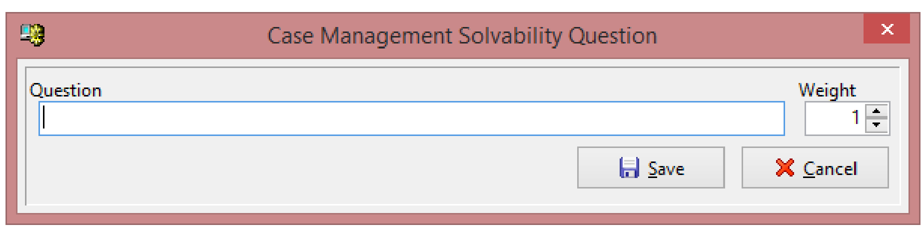
Case Management Solvability Questions

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**.



2. Click **Add A New Record**.



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 *Case Management Solvability Recommendations* to ensure the maximum potential solvability score is considered in the configured ranges.

5. Click **Save**.

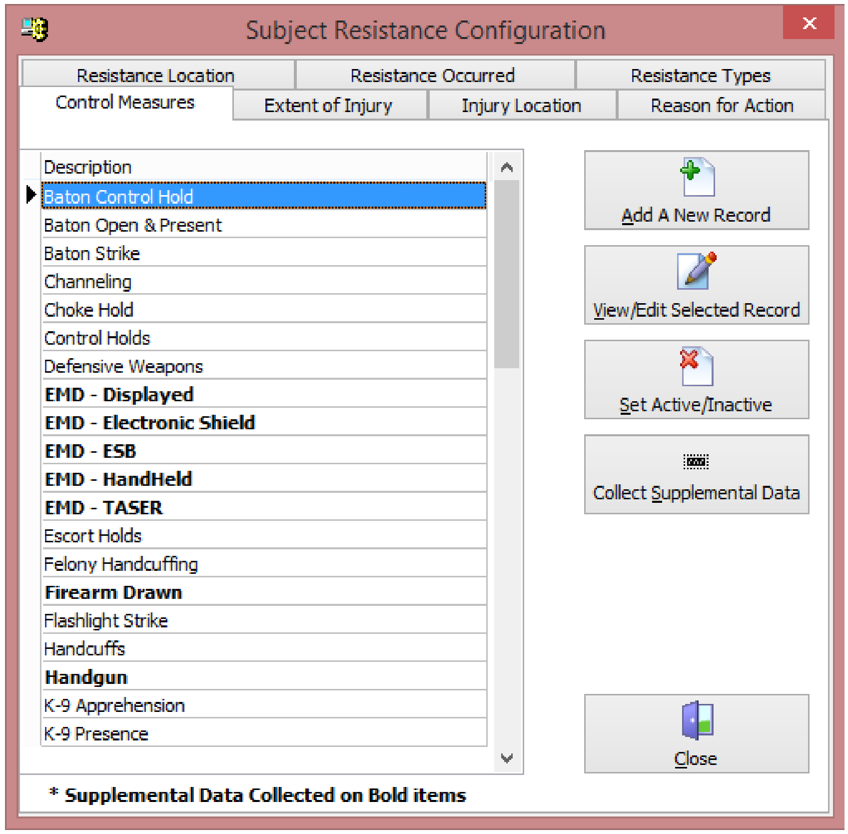
6. When finished working with solvability questions, click **Close**.

- ✓ 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

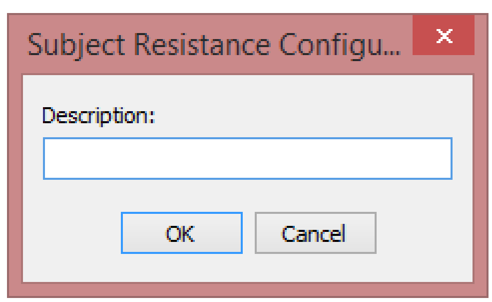
The *Subject Resistance Configuration* is used to set up drop-down menu options shown when creating a Subject Resistance Report associated with an offense report.

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



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**.



3. Enter the **Description**. This will serve as the drop-down menu option.

4. Click **OK**.

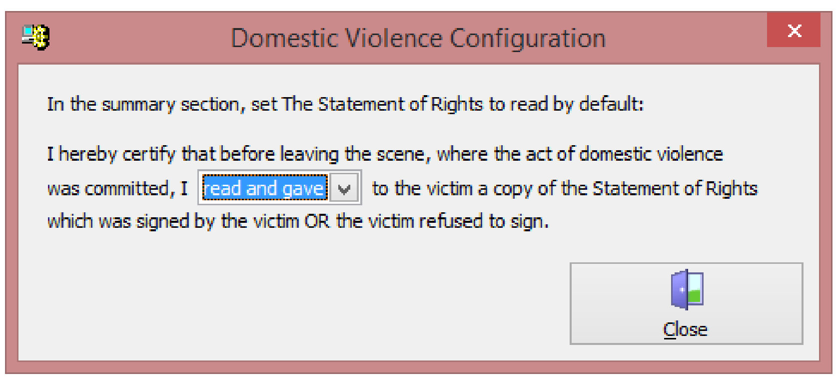
5. When finished working with the *Subject Resistance Configuration*, click **Close**.

- ✓ 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**.

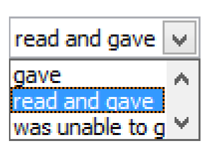
Domestic Violence Configuration

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.

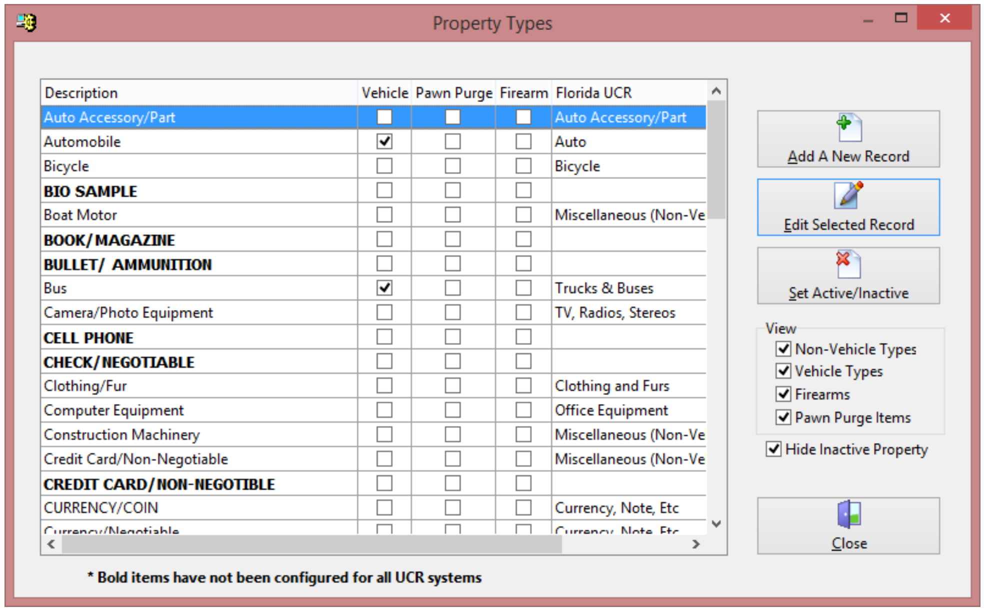


3. When finished, click **Close**.

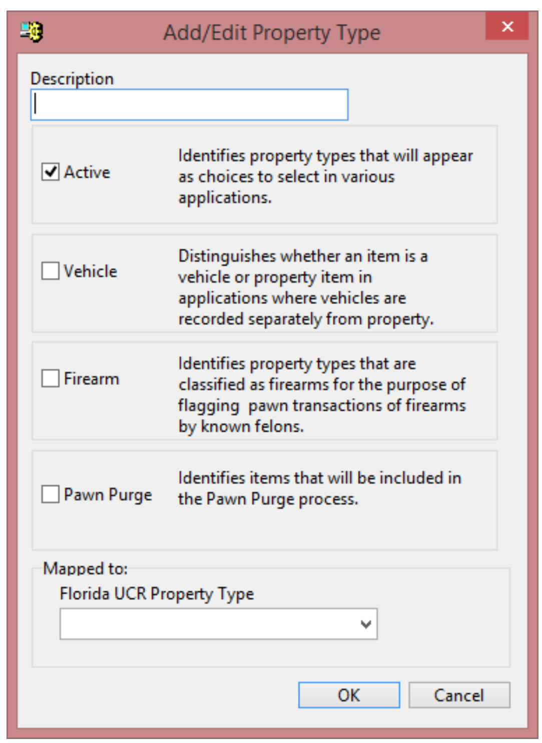
Property Items

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 goverments.

1. Click on the *RMS* menu and select **Property Items**.



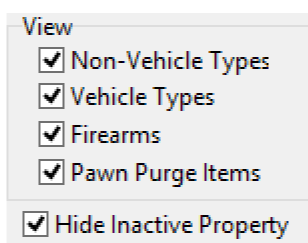
2. Click **Add A New Record**.



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**.

TIPS

- ✓ 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.

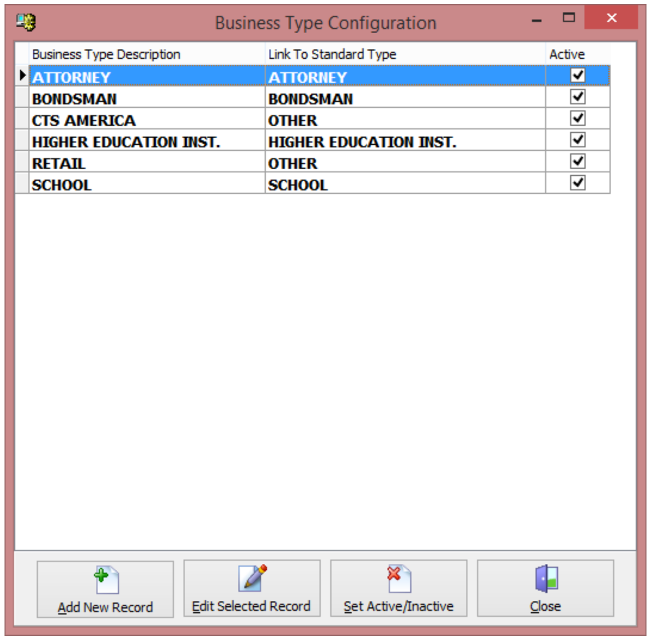


By default, all options are selected.

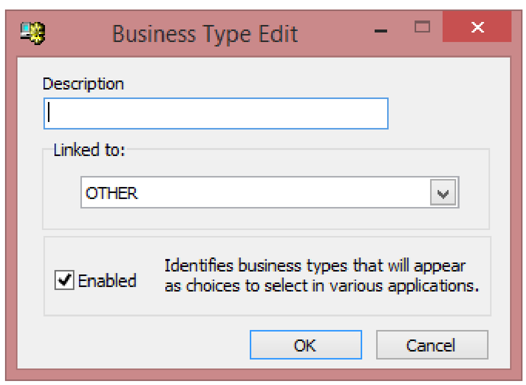
Business Types

Business types created here are available throughout the Records Management Software suite of applications.

1. Click on the *RMS* menu and select **Property Items**.



2. Click **Add New Record**.



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**.

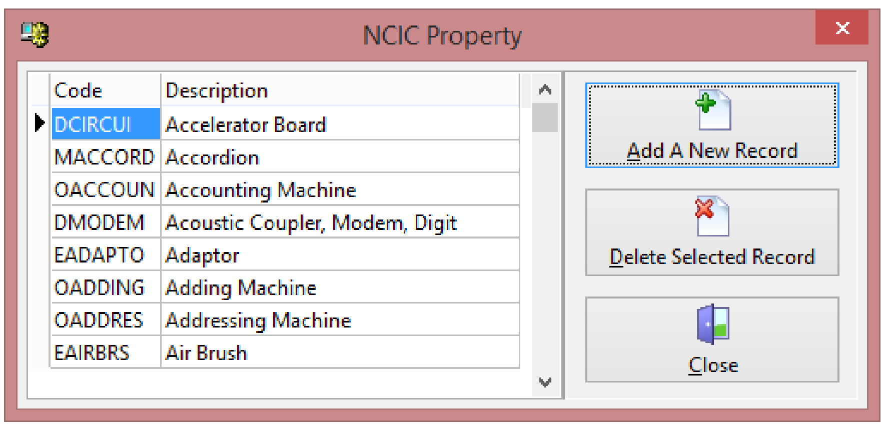
- ✓ To modify an existing business type, double-click the record or highlight it and click on **Edit Selected Record**.
- ✓ Once created, business types cannot be deleted, but they can be disabled. Highlight the desired business type, and click on **Set Active/Inactive** to disable an active business 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**.

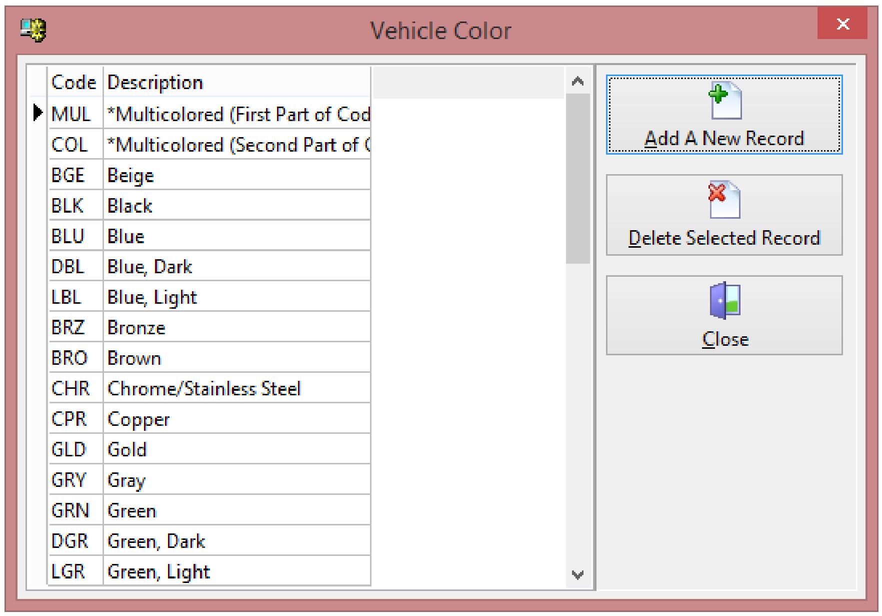
- ✓ To modify an existing NCIC Property record, double-click it in the list.
- ✓ To delete an NCIC Property record, highlight it and click **Delete Selected Record**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **No**.

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**.



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**.

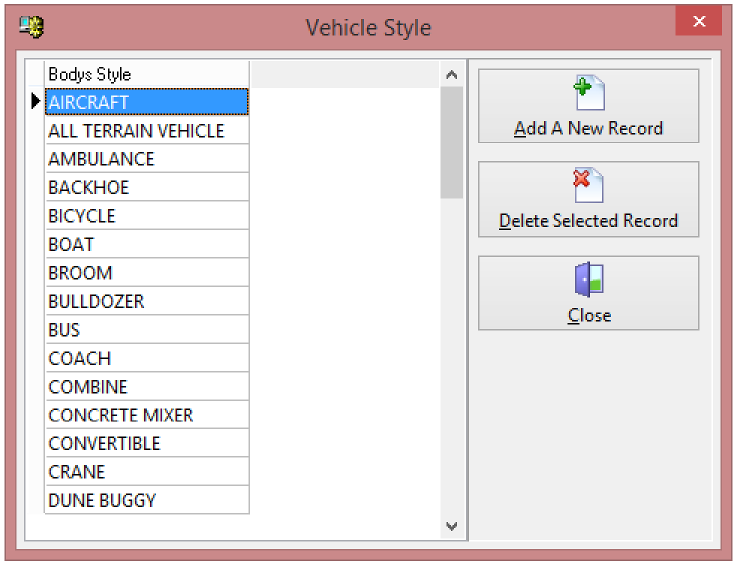
✓ To modify an existing vehicle color record, double-click it in the list.

✓ 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**.

TIPS

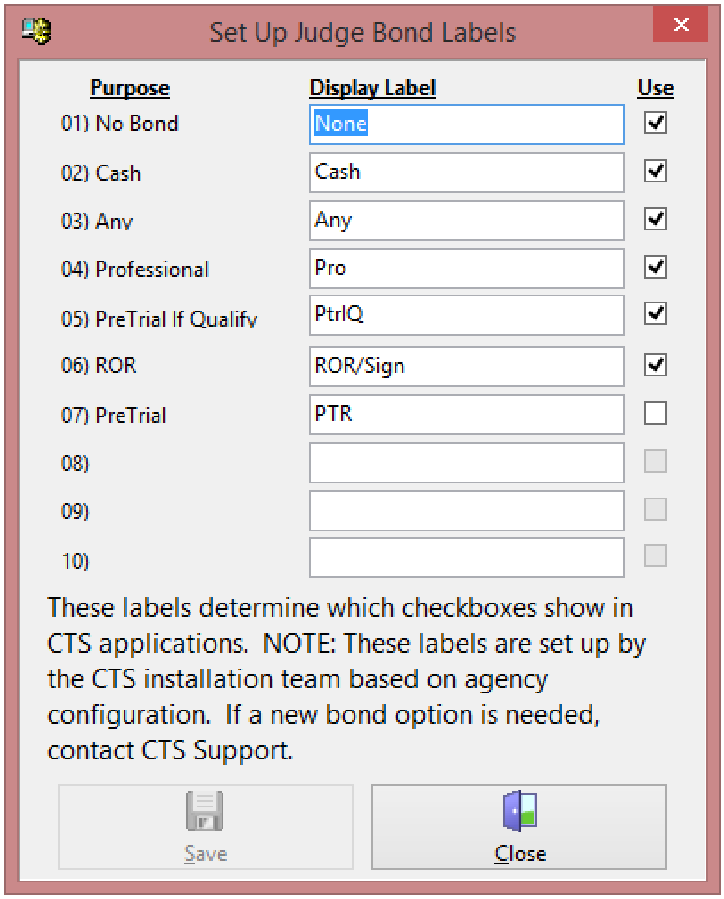
- ✓ To modify an existing vehicle style record, double-click it in the list.
- ✓ To delete a vehicle style record, highlight it and click **Delete Selected Record**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **No**.

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**.



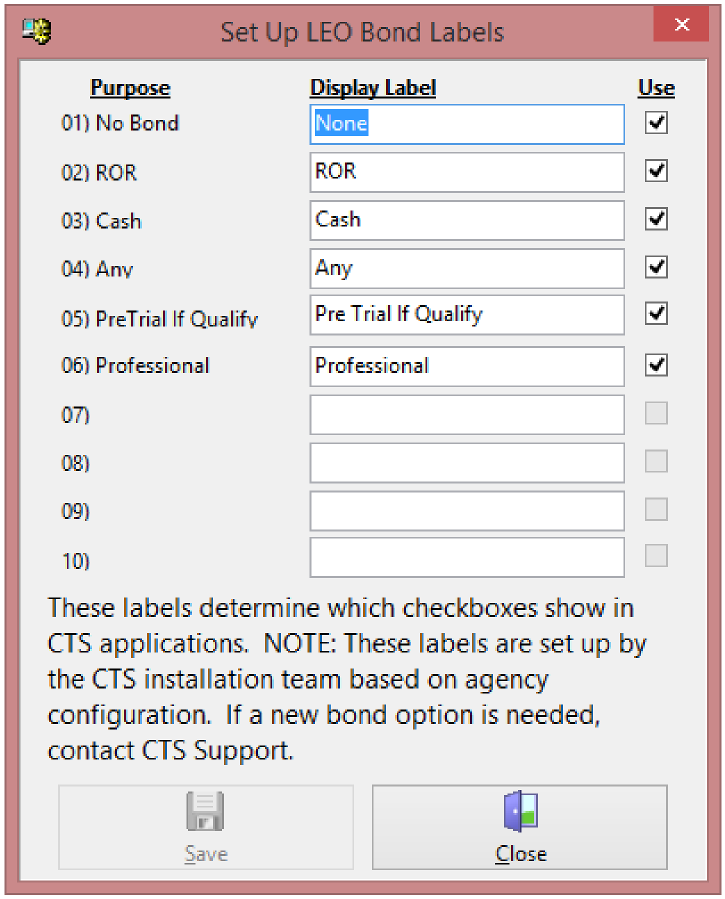
2. Use the check boxes to the right of the bond labels to indicate which bond options should appear in SmartRMS and SmartJAIL. Leave a check box empty if that bond option should not be available to users.

3. Click **Save**.

4. When finished, click **Close**.

LEO Bond Labels

1. Click on the *Bond Types* menu and select **LEO Bond Labels**.



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**.

CTS America™

Chapter 4

Fleet Management

Version 9.4

User Manual

Printed December 18, 2014

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

CTS America

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Table of Contents

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

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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 *Fuel Employee ID* tab
Access *Fuel File Configuration* tab	**[F2]**	**Options**>**Fuel File Configuration** or Click on *Fuel File Configuration* tab
Access *Funding Sources* tab	**[F3]**	**Options**>**Funding Sources** or Click on *Funding Sources* tab
Access *Maintenance* tab	**[F4]**	**Options**>**Maintenance** or Click on *Maintenance* tab

To Do This	Press This Key	Or Use the Mouse Here
Access *Makes & Models* tab	**[F5]**	**Options>Makes & Models** or Click on *Makes & Models* tab
Access *Vehicle Usage Categories* tab	**[F6]**	**Options>Vehicle Usage Categories** or Click on *Vehicle Usage Categories* tab
Access *Vendors* tab	**[F7]**	**Options>Vendors** or Click on *Vendors* 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 *Configuration* window	**[Alt+C]**	**File>Close** or Click **Close** button

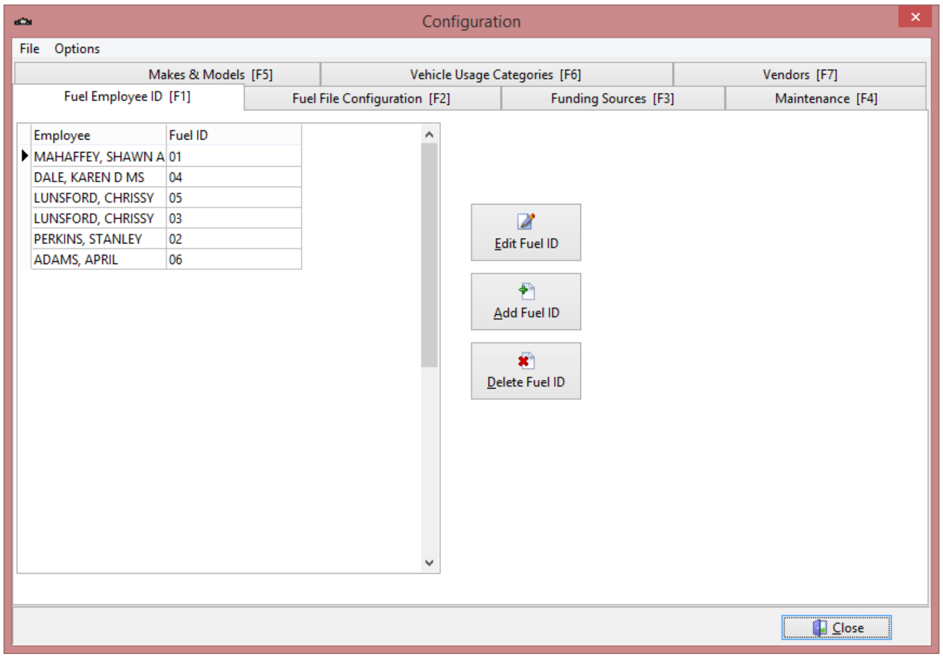
Within a Fleet Vehicle Record

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 *Current Assignment* 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]** (*Attachments* tab only)	Click **Delete [Detail Type]**
Open selected attachment (*Attachments* tab)	**[Alt+O]**	Click **Open** button
Save attachment to local computer (*Attachments* tab)	**[Alt+S]**	Click **Save As…** button
Refresh attachments list (*Attachments* 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”

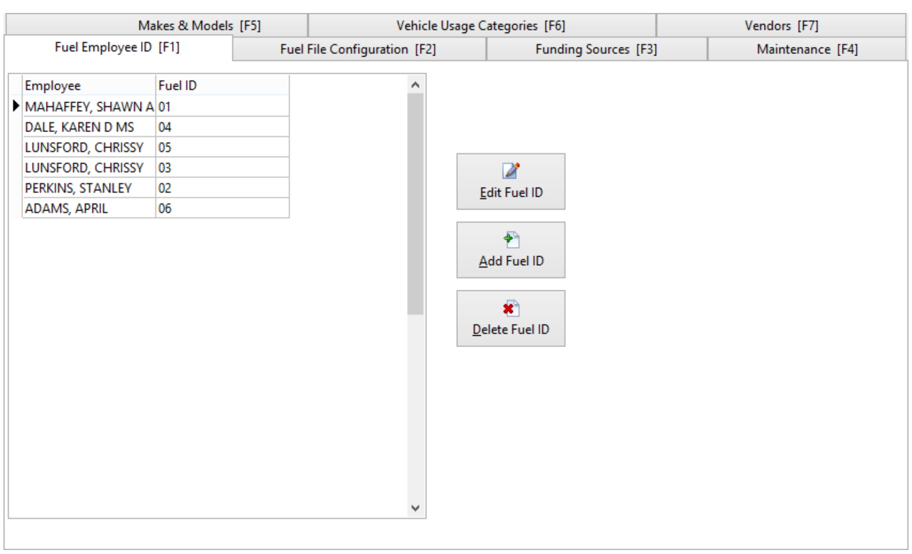
Fleet Management Configuration

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*.

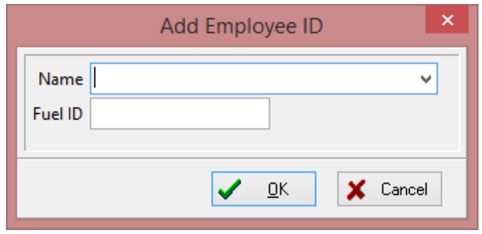


Employee Fuel ID

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.



1. Click on the **Fuel Employee ID** tab, if it is not already active.
2. Click **Add Fuel ID**.



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**.

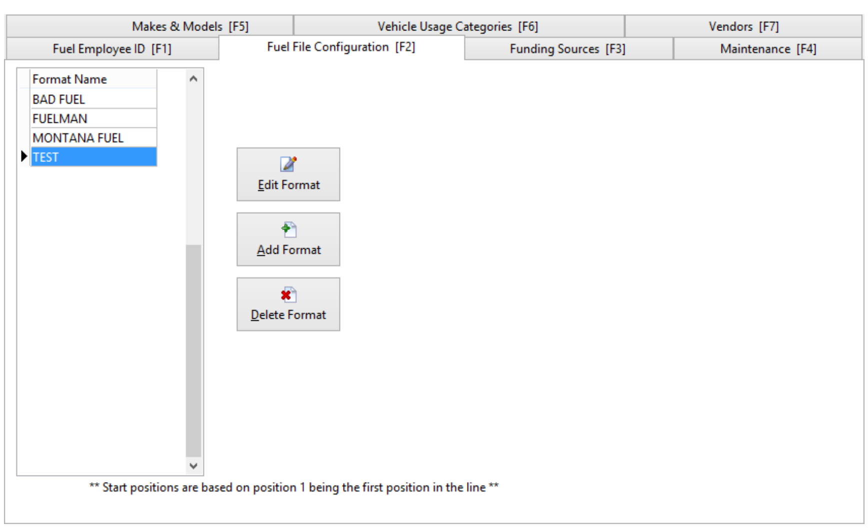
TIPS

✓ To modify an existing fuel ID, highlight it and click on **Edit Fuel ID**.

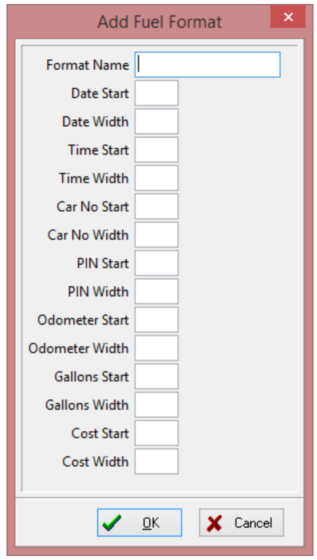
✓ To delete a fuel ID, highlight it and click on **Delete Fuel ID**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **[Yes]**.

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.



1. Click on the **Fuel File Configuration** tab.
2. Click **Add Format**.



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`.

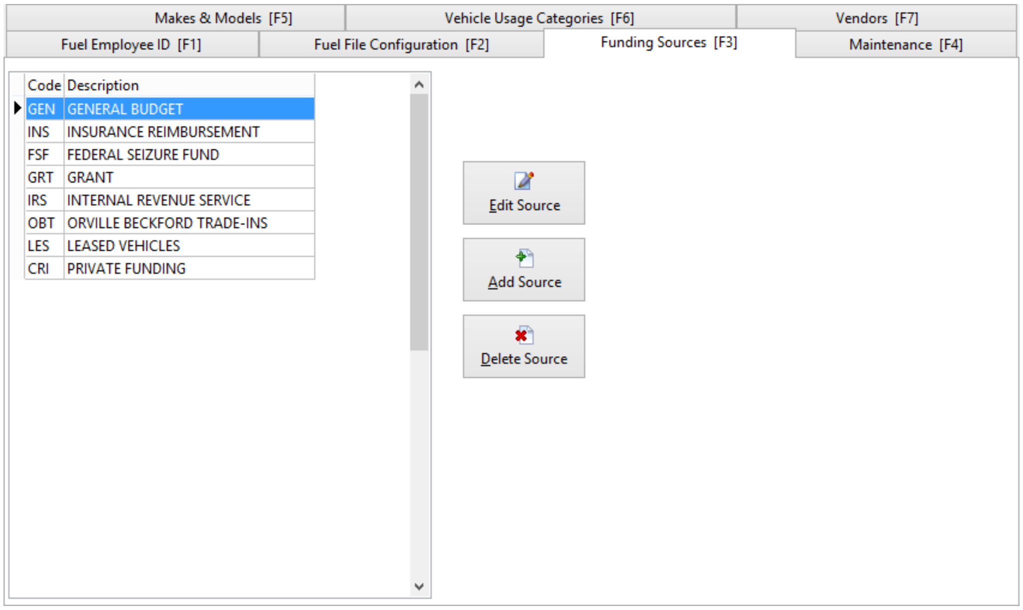
5. Click **OK** when finished entering all information.
6. When finished working with the *Configuration* window, click **Close**.

TIPS

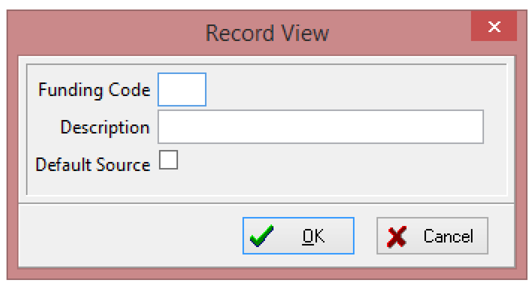
- ✓ To modify an existing fuel file record, highlight it and click on **Edit Format**.
- ✓ The *Bad Fuel* format name is reserved and cannot be edited.
- ✓ To delete a fuel file record, click **Delete Format**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **[Yes]**.

Funding Sources

Use this tab to designate sources of funding for vehicle fuelling and maintenance.



1. Select the **Funding Sources** tab.
2. Click **Add Source**.



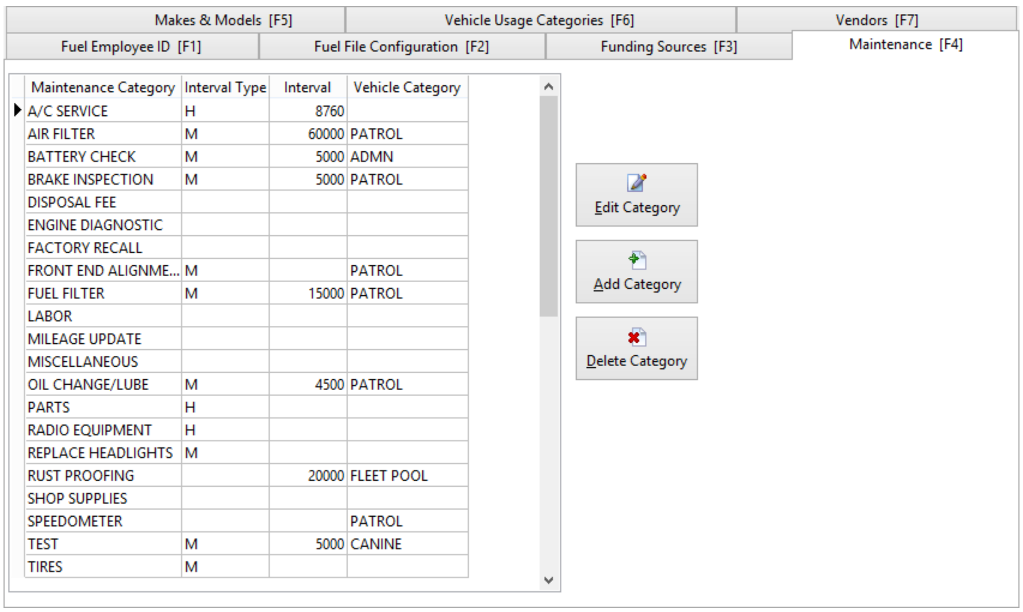
3. Enter the funding **Code**.
4. Enter a **Description** of the funding source.
5. If applicable, place a check beside **Default Source**.
6. Click **OK**.
7. When finished working with the *Configuration* window, click **Close**.

TIPS

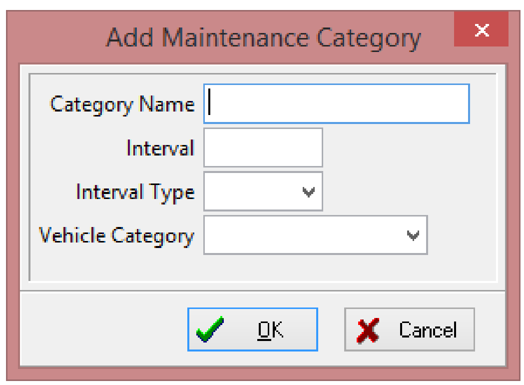
- ✓ To modify an existing fund source record, highlight it and click on **Edit Source**.
- ✓ To delete a funding source, highlight it and click on **Delete Source**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **[Yes]**.

Maintenance

Use this tab to set up a list of maintenance procedures that will be performed to agency vehicles.



1. Click on the **Maintenance** tab.
2. Click on **Add Category**.



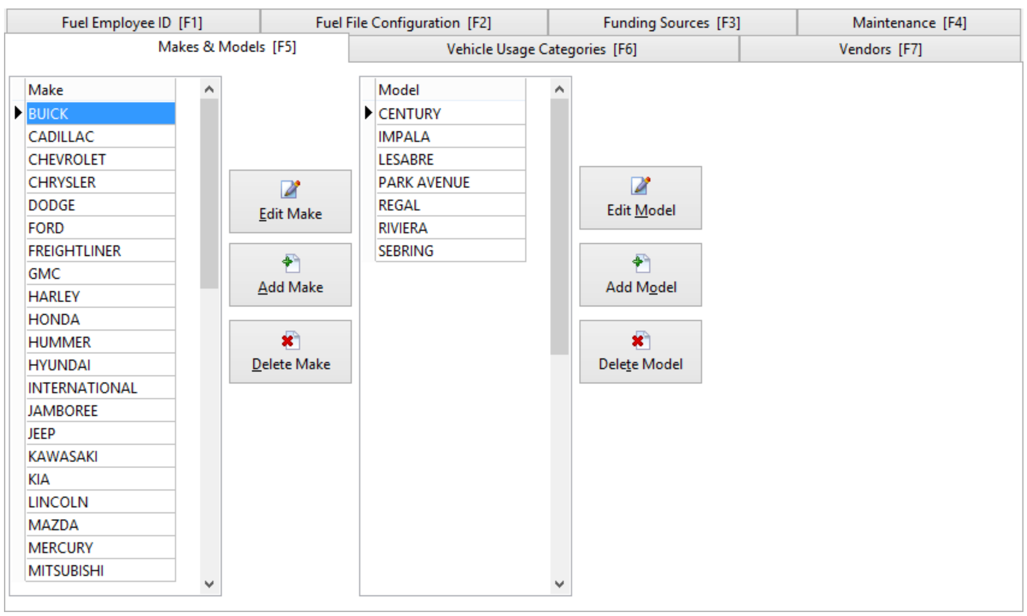
3. Enter the **Category Name**.
4. Enter the **Interval** and choose the **Interval Type** (*Hours* or *Miles*) from the drop-down menu.
5. Choose the **Vehicle Category** from the drop-down menu.
6. Click **OK**.
7. When finished working with the *Configuration* window, click **Close**.

TIPS

- ✓ 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]**.

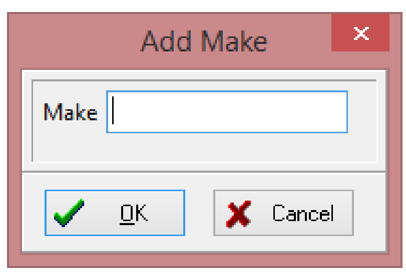
Makes & Models

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*.



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**.

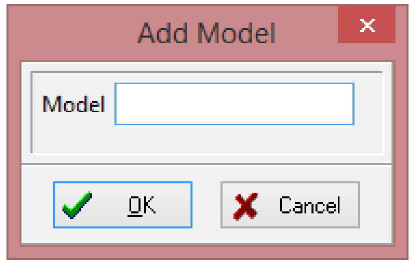


    b. Enter the vehicle **Make**.
    c. Click **OK**.

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**.



    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]**.

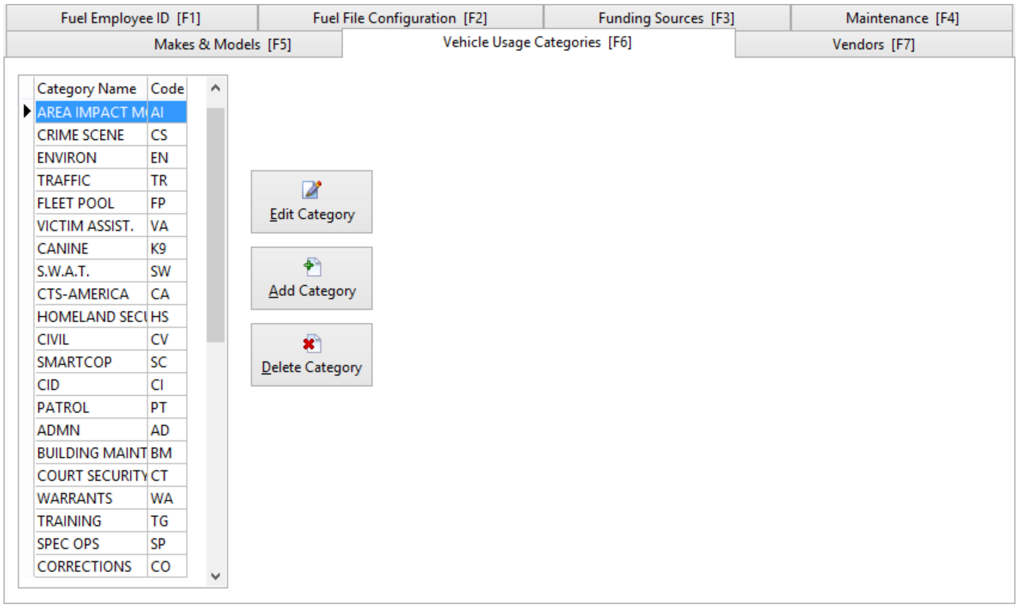
✓ When a vehicle make is deleted, any associated models are also deleted.

✓ To modify an existing vehicle model, highlight it and click on **Edit Model**.

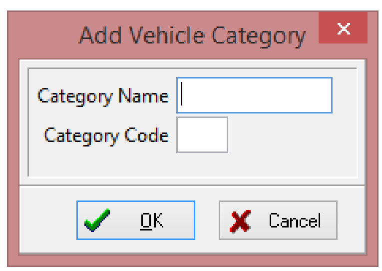
✓ To delete a vehicle model, highlight it and click on **Delete Model**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **[Yes]**.

Vehicle Usage Categories

This tab allows administrators to designate the different methods by which vehicles may be utilized by the agency.



1. Click on the **Vehicle Usage Categories** tab.
2. Click **Add Category**.



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**.

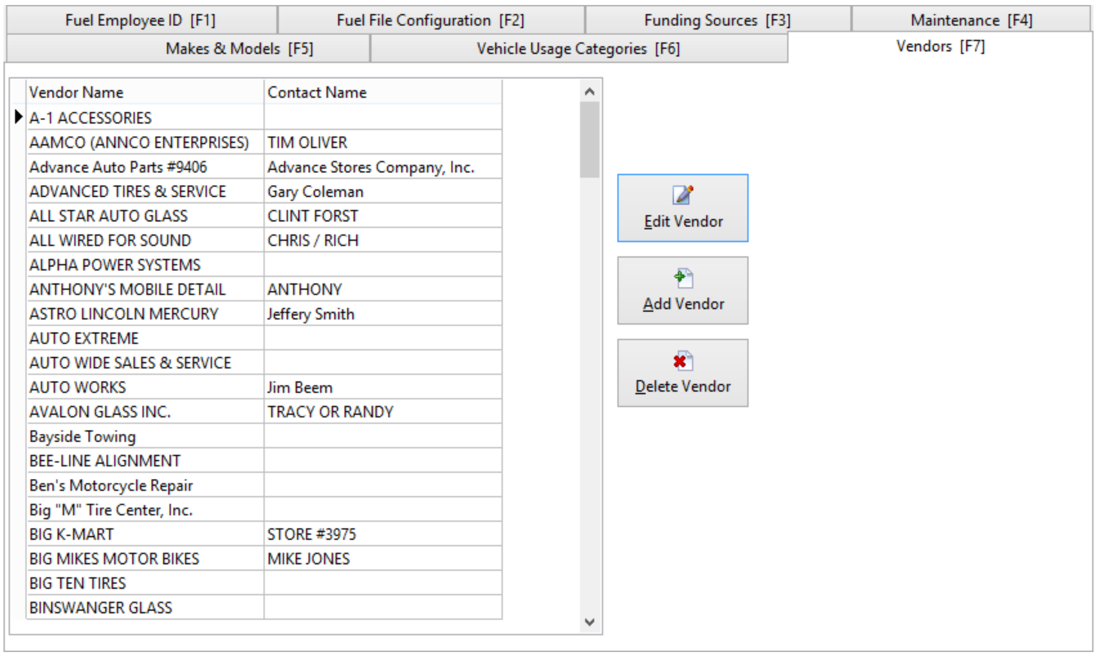
TIPS

✓ To modify an existing vehicle usage category, highlight it and click on **Edit Category**.

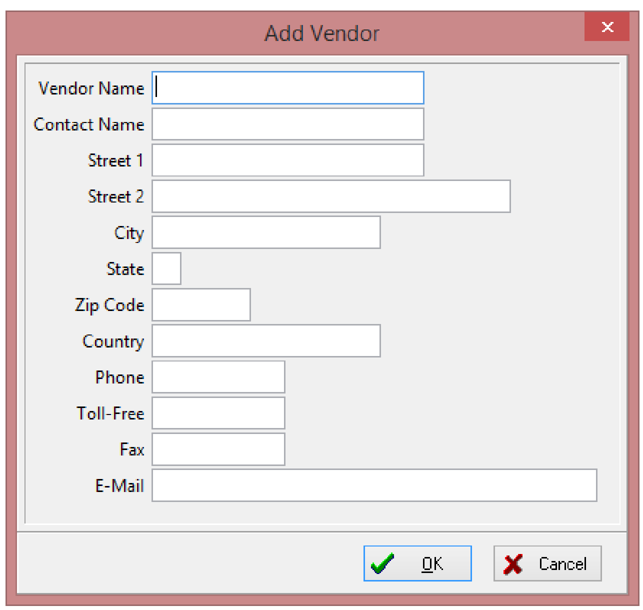
✓ To delete a vehicle usage category, highlight it and click on **Delete Category**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **[Yes]**.

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.



1. Click on the **Vendors** tab.
2. Click **Add Vendor**.



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**.

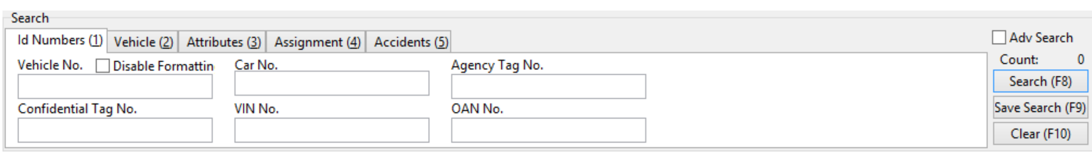
✓ To modify an existing vendor record, highlight it and click on **Edit Vendor**.

✓ 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

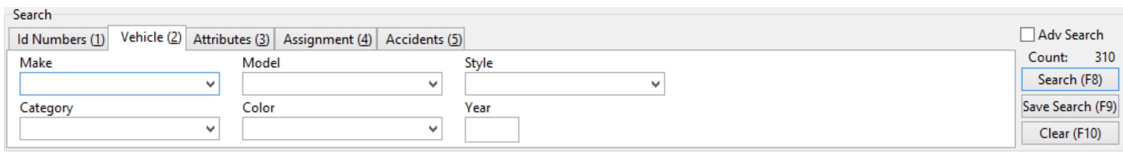


The **ID Numbers** tab is selected by default when *Fleet Management* opens.

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



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

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)

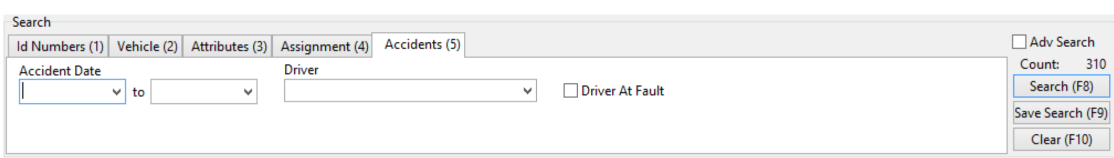
3. Press **[Enter]** or click **Search**. All records matching the criteria are listed.
4. Double-click the desired record or select it and press **[Enter]** to open the record.

Assignment

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



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.

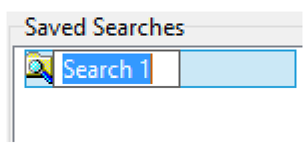
Conducting an Advanced Search

1. Place a check beside **Adv Search** to use multiple search tabs for more specific results.
2. Enter search criteria in all necessary tabs (ID Numbers, Vehicle, Attributes, Assignment, Accidents).
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.



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

TIPS

- ✓ Hover the mouse over a saved search folder to reveal the search criteria.
- ✓ 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.

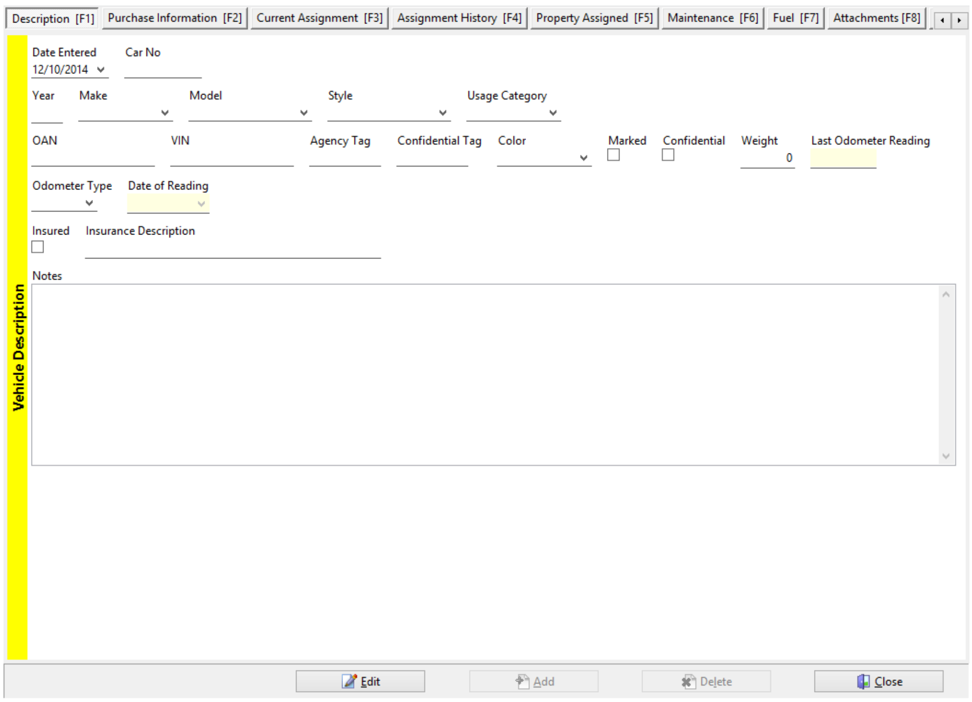
- Right-click on the grid and select a column by which to sort from the context menu.
- Click on the *Options* menu and select **Sort**, then select a column by which to sort from the menu.
- Left-click on the column by which the list should be sorted.

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**.



   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.

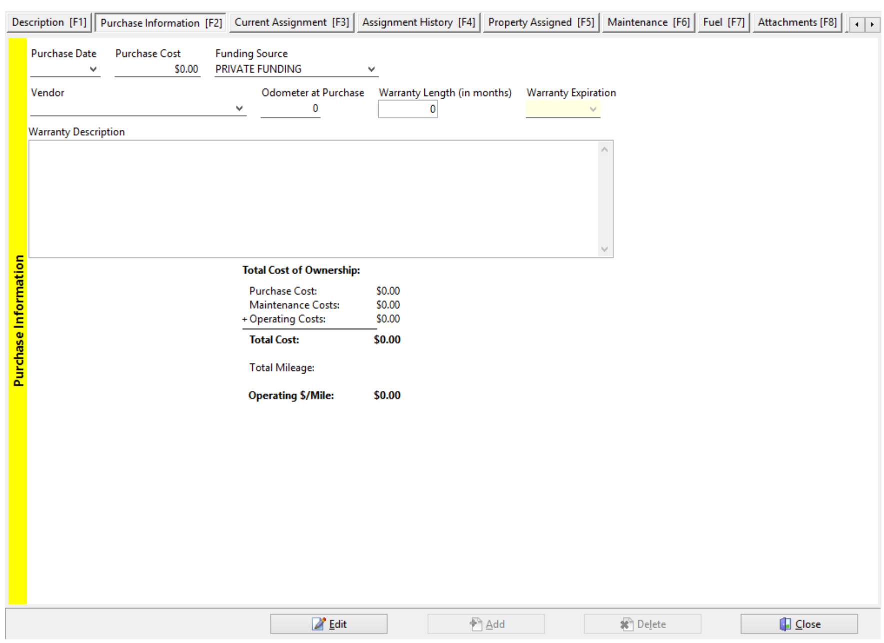
i. If the vehicle has insurance, place a check beside **Insured** and enter the details in **Insurance Description**.

j. Enter any **Notes** that apply to this vehicle.

TIPS

- ✓ 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 Configuration console.

3. Click on the **Purchase Information** tab, and click **Edit**.



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)**.

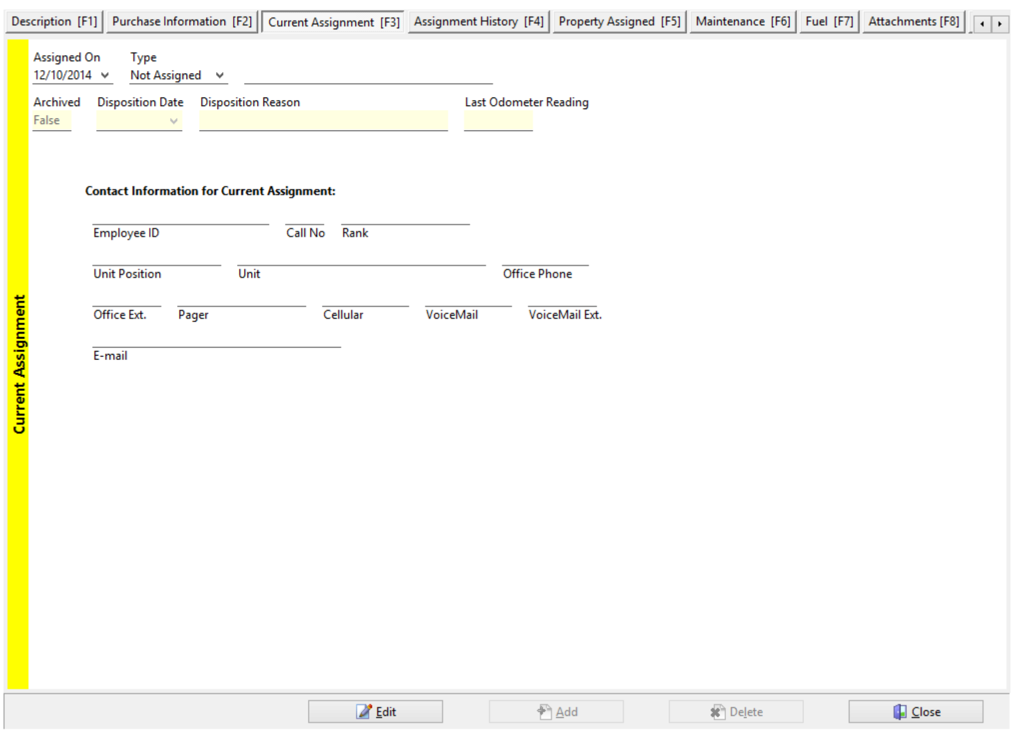
g. Enter warranty details in **Warranty Description**.

TIPS

✓ The *Warranty Expiration* field is populated based upon the purchase date and the length of the warranty.

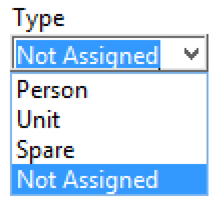
✓ The operating cost per mile for the vehicle (displayed at the bottom of the tab) takes into account all maintenance and fuel purchases for the vehicle. If the vehicle was purchased used, the mileage prior to purchase is not considered.

4. Click on the **Current Assignment** tab, and click **Edit**.



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*.

TIPS

✓ 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.

TIPS

✓ 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.

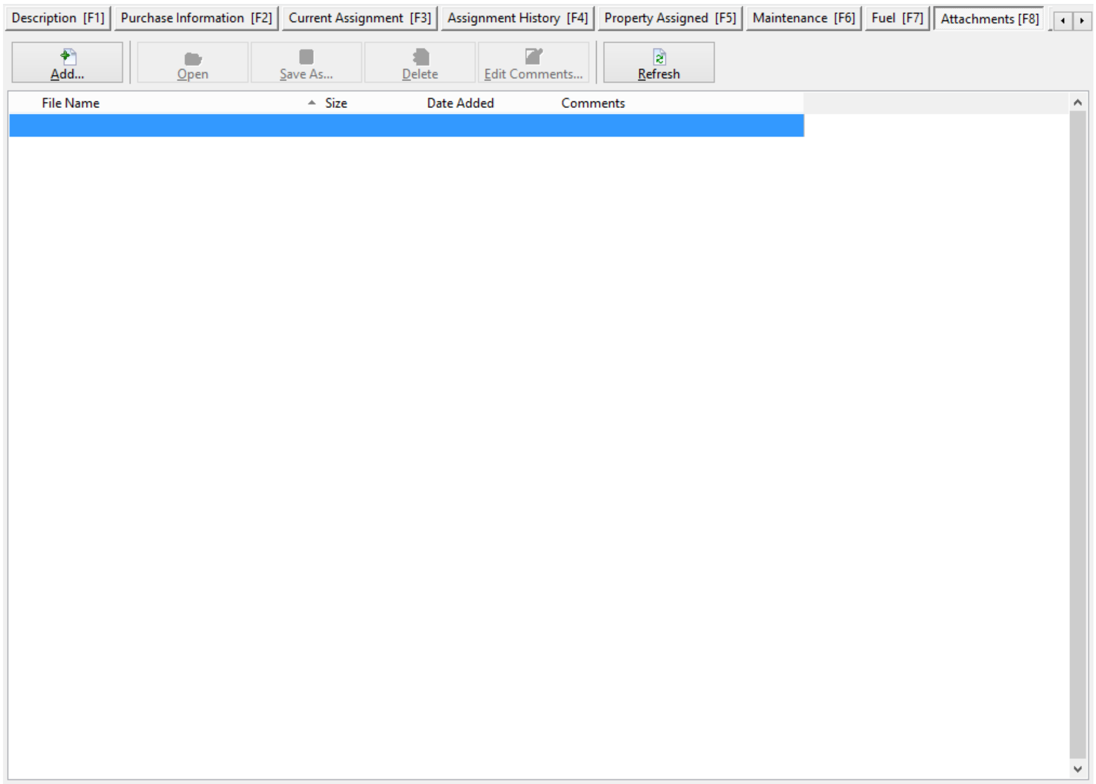
✓ The *Property Assigned* tab is read-only regardless of access level. It shows any property that has been assigned to the vehicle, itself, through *Issued Property*.

✓ Vehicle records are color-coded: green indicates spare vehicles; yellow indicates unassigned vehicles; white indicates assigned vehicles.

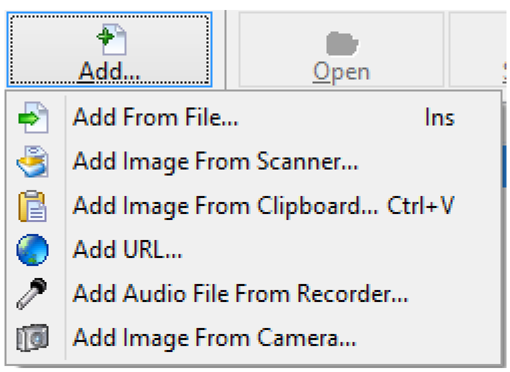
Color	Indication
(Green)	Spare Vehicle
(Yellow)	Unassigned Vehicle
(White)	Assigned Vehicle

Adding Attachments

Within the *Attachments* tab files relating to the vehicle may be uploaded to the server for reference when making considerations.



1. Click on the **Attachments** tab.



2. Click **Add**.

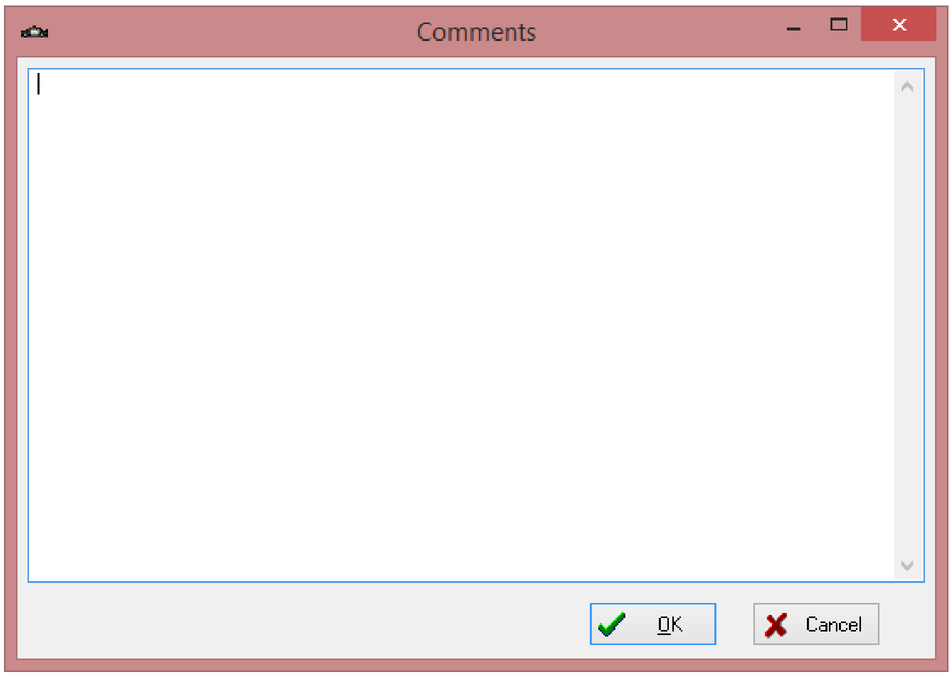
3. Choose the source for the attachment.

   - **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**.



5. Enter a brief description of the attachment.
6. Click **OK**.

TIPS

✓ Click **Open** to view the selected attachment.

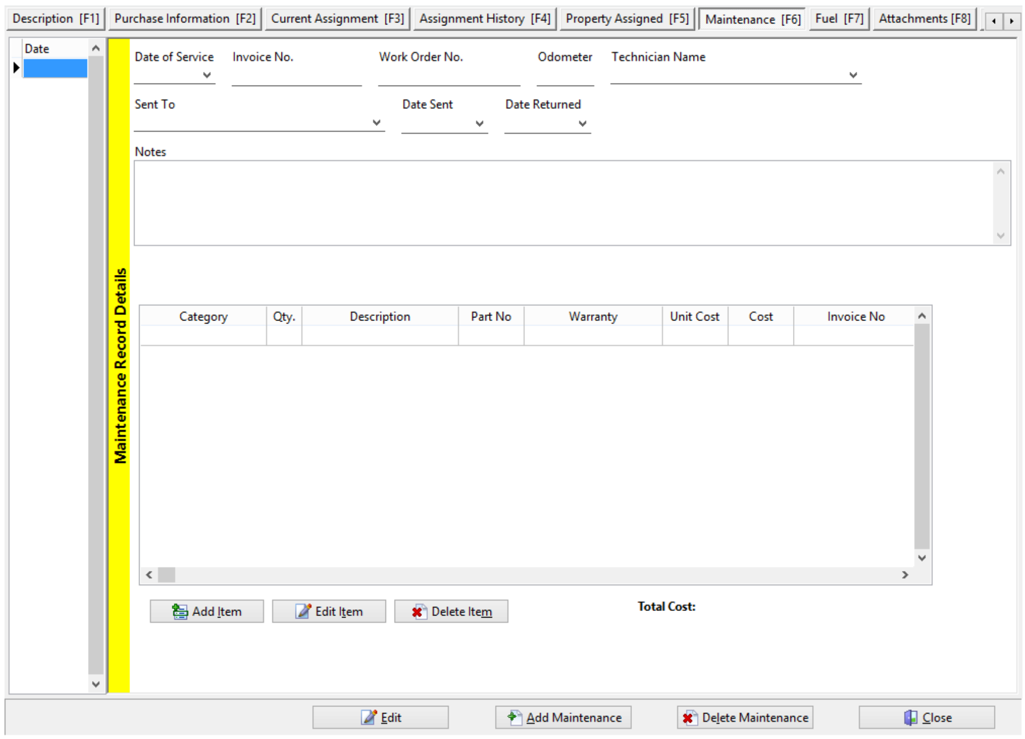
✓ Click **Save As…** to save a copy of the selected attachment to the local computer, a USB drive, or a network location.

✓ 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.

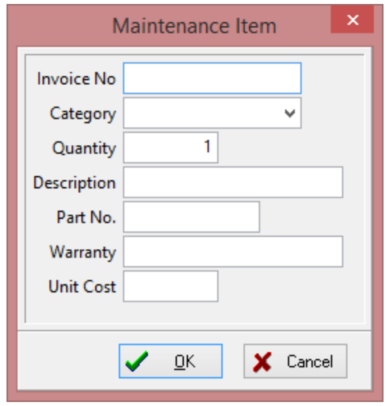
Within Vehicle Record



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**.



   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**.

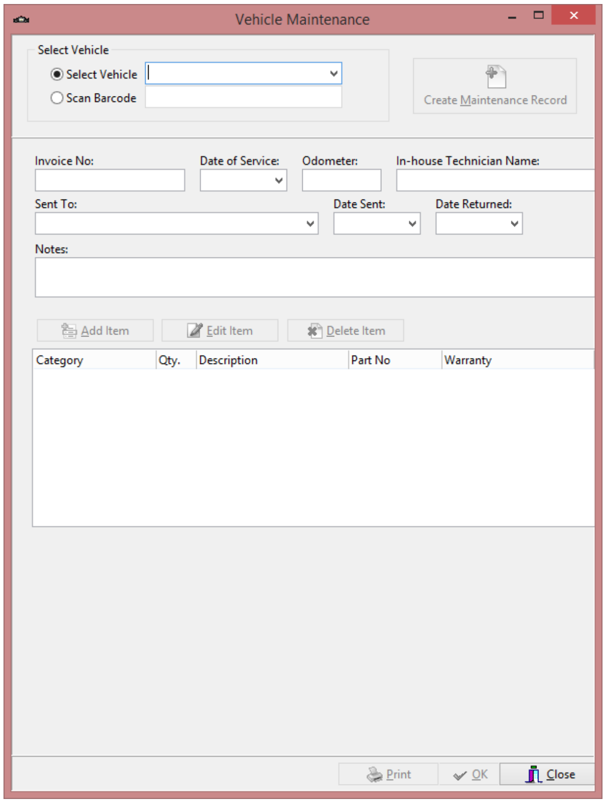
9. When finished working with the vehicle record, click **Close**.

✓ 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**.



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.

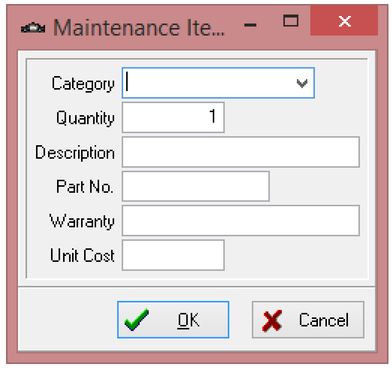
    a. If the maintenance was performed in-house, choose the **In-house Technician Name** from the drop-down menu.

    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**.



    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**.

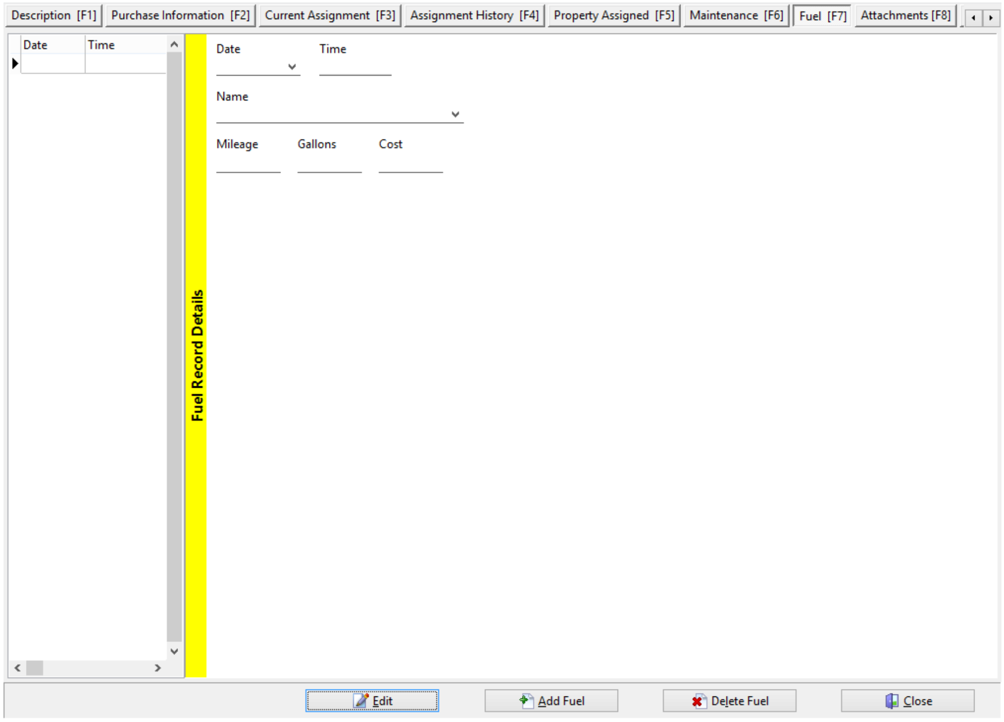
✓ Data is required in the *Invoice Number* field before the *Add* button is available for adding items to the record.

✓ 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



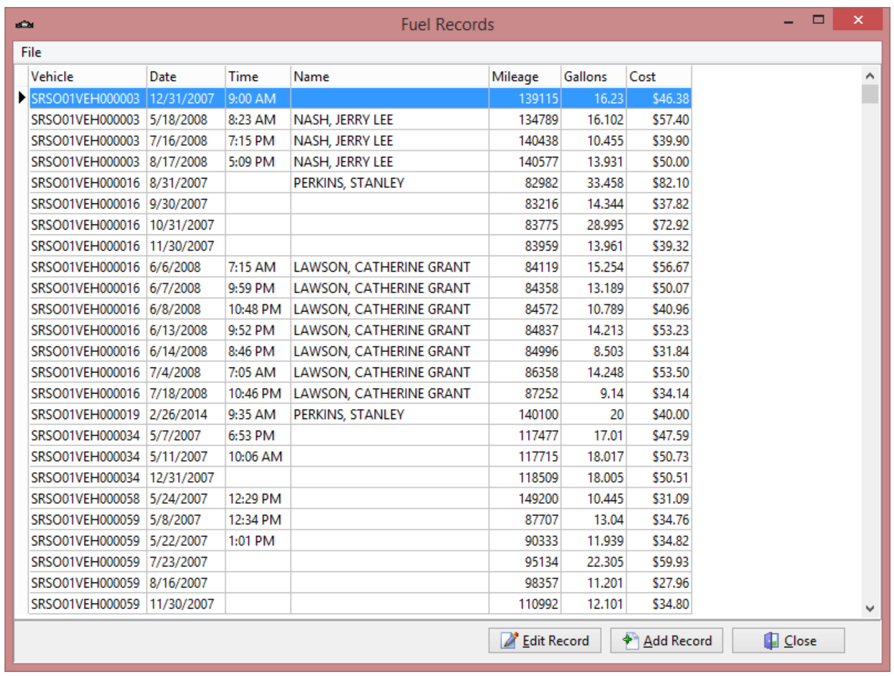
1. Search for, and open, the desired vehicle record.
2. Press **[F7]** or click on the **Fuel** tab.
3. Click **Add Fuel**.
4. If applicable, change the **Date**.
5. Enter the **Time** of the transaction.
6. Enter the **Name** of the employee making the purchase.
7. Enter the odometer reading at the 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

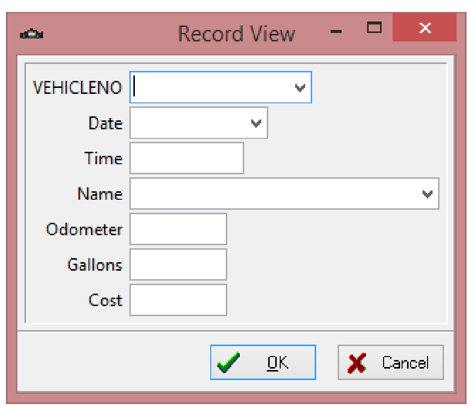
This option provides a way to record one or more fuel expenses quickly and easily, especially when multiple vehicles are involved.

1. Press **[Alt+T]** or click on the *Fuel* menu and select **Enter Fuel Tickets**.



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

2. Click **Add Record**.



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**.

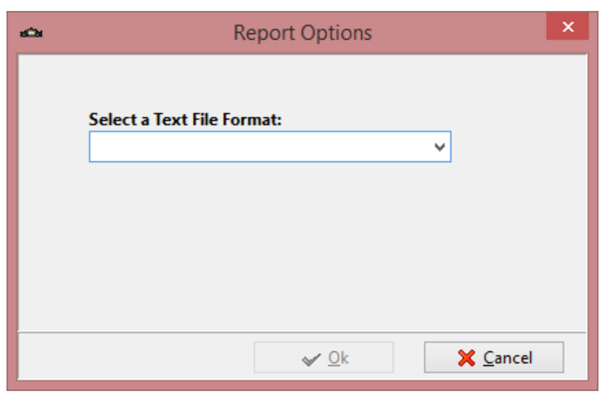
TIPS

✓ 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 *Configuration*.
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.

TIPS

- ✓ 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 re-import 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**.

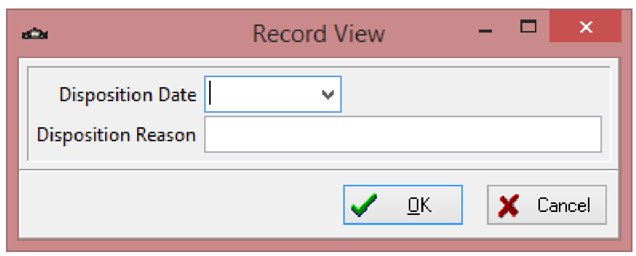
Archiving/Unarchiving a Vehicle

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.



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 un-archived.
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 *Person Assignment*, *Unit Assignment*, *Spare* and *Not Assigned*. Within the *Person* and *Unit* groups, the names or units are also sorted. • **Car Number**: Sorts vehicle records by *Car Number* • **Make and Model**: Sorts vehicle records by the *Vehicle Make* and *Vehicle Model* • **Year**: Sorts vehicle records by the *Vehicle Year*
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 *Car Number* • **Person**: Provides a listing of vehicles assigned to specific persons, including the *Person* and the *Date Assigned* • **Persons In Unit**: Provides a listing of vehicles assigned to persons in a specific unit, including: *Vehicle Number* (with bar code), *Car Number*, *Year*, *Make*, *Model*, *Category*, *Marked* status, *VIN*, *OAN*, *Agency Tag Number*, *Confidential Tag Number*, *Odometer* reading, *Date Assigned*, and employee assigned (*Name*, *Employee ID*, and *Unit*) • **Spare**: Provides a listing of all spare vehicles by *Car Number* • **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: *Vehicle Number* (with bar code), *Department*, *Car Number*, *Year*, *Make*, *Model*, *Category*, *VIN*, *OAN*, *Agency Tag*, *Confidential Tag*, *Odometer* reading, *Date Assigned*, and employee assigned (*Name*, *Employee ID*, and *Unit*)
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: *Vehicle Number* (with bar code), *Car Number*, *Employee*, *Date*, *Time*, *Odometer* reading, *Gallons* of fuel, and *Cost* 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: *Car Number*, *Year*, *Make*, *Model*, *Style*, *Category*, *VIN*, *OAN*, *Purchase Date*, *Odometer at Purchase*, *Last Odometer Reading*, *Average MPG*, *Total Cost of Ownership*, and a breakdown of all repairs made

Report	Description
Vehicle Details	• Provides details for the specified vehicle, including the *Vehicle Number* (with bar code), *Car Number*, *Year*, *Make*, *Model*, *Style*, *Color*, *Weight*, *VIN*, *Agency Tag Number*, *Confidential Tag*, *Marked* (status), *Odometer* reading, *Average MPG*, *Purchase Date*, *Purchase Cost*, *Vendor*, *Total Cost of Ownership*, *Warranty Length*, *Warranty Expiration*, *Description*, *Date Assigned*, and employee assigned (*Name*, *Employee ID*, and *Unit*) • Also lists all *Assigned Property* related to the vehicle, the *Assignment History* of the vehicle, and the *Maintenance History* • Maintenance history includes each *Date of Service*, with the *Mileage*, I*nvoice Number*, the name of the *Assigned Employee*, where the vehicle was sent for repair, the *Date Sent*, the *Date Returned*, 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 *Accident Date*, *Car Information*, *Driver*, *Repair Cost*, and whether the driver was at fault

TIPS

- ✓ Users with Limited Access (LA) cannot view or print the following reports
  - Fuel Averages
  - Fuel Records: All Vehicles
  - 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**.

CTS America™

Chapter 5

Property Management

Version 9.4

User Manual

Printed December 18, 2014

Printed December 18, 2014

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

CTS America

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Table of Contents

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: support@cts-america.com

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 *Configuration* 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 *Inspections* and *Maintenance* 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 (*ID Types* tab)	N/A	**Set Active/Inactive** button

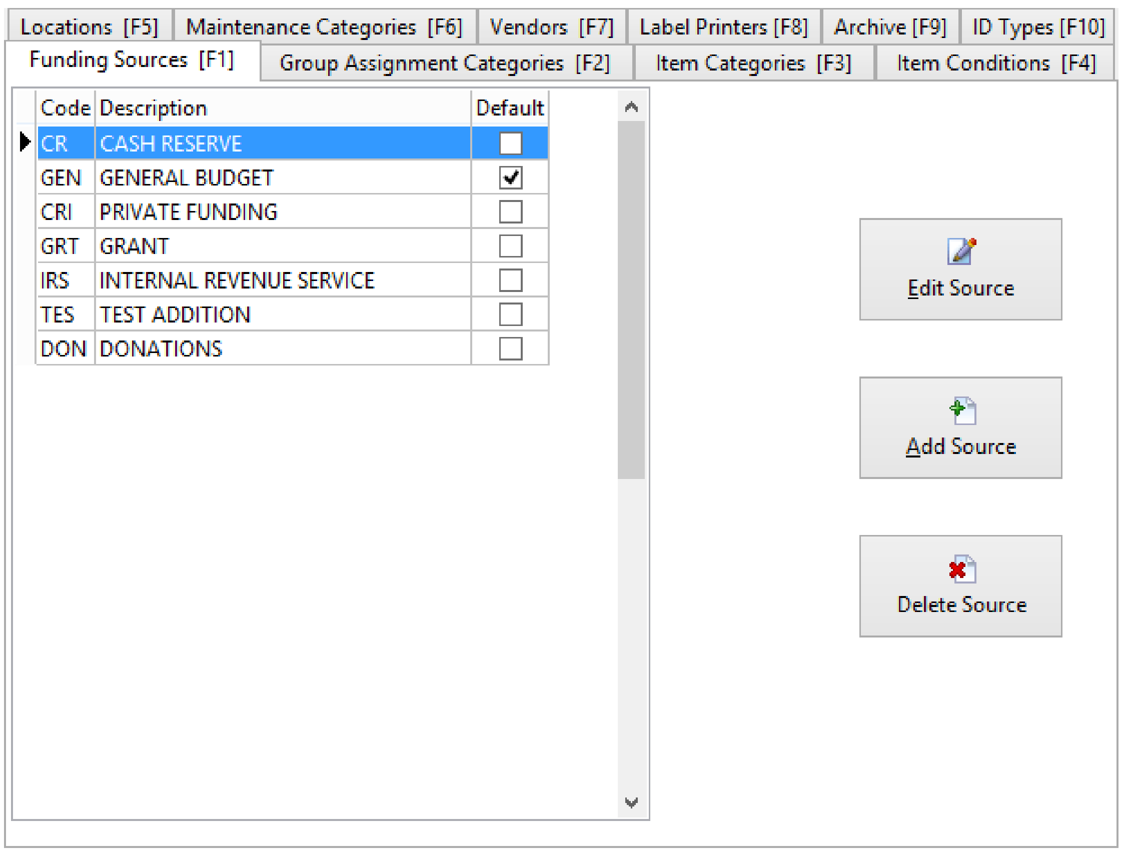
Configuring Property Management

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.

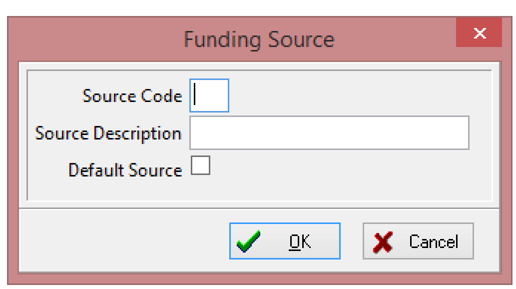
Funding Sources

Use this tab to designate different sources of funding for the purchase of the equipment issued to officers.



The *Funding Sources* tab is selected by default when the *Configuration* console opens.

1. Click **Add Source**.



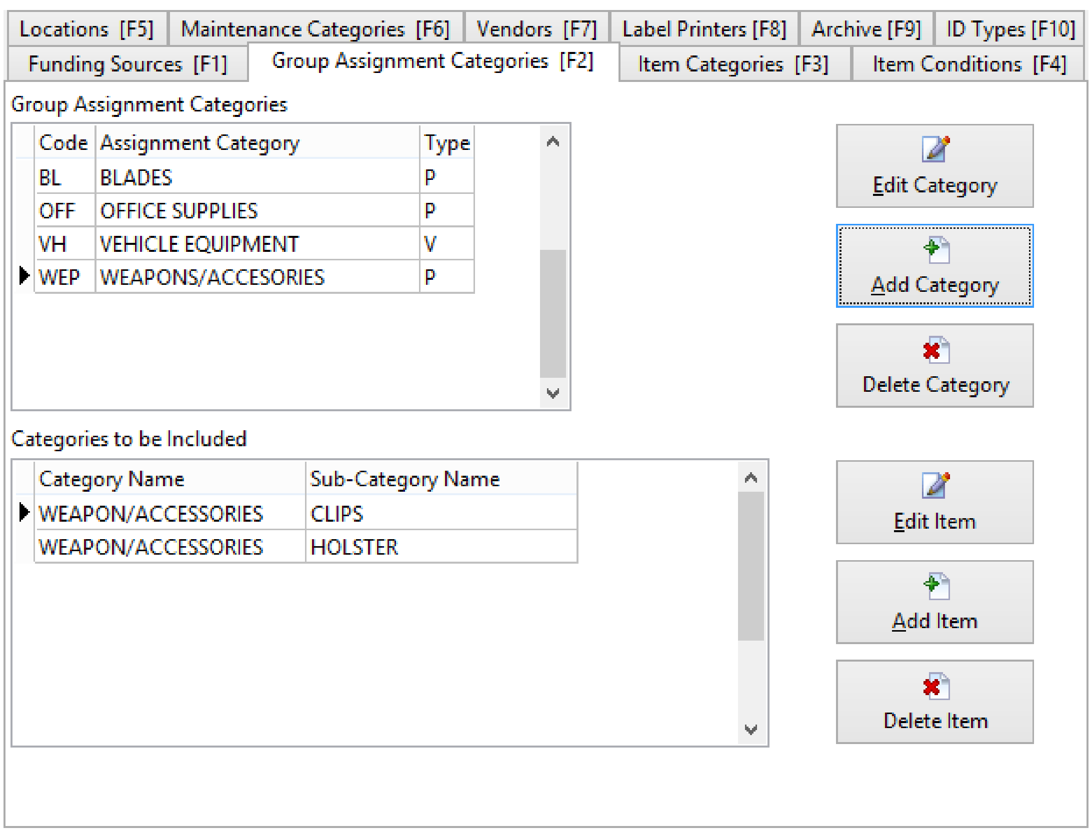
2. Enter a **Source Code** and **Source Description**.
3. If this will be the new default funding source, place a check beside **Default Source**.
4. Click **OK**.
5. When finished working with the *Configuration* console, click **Close**.

TIPS

- ✓ 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**.

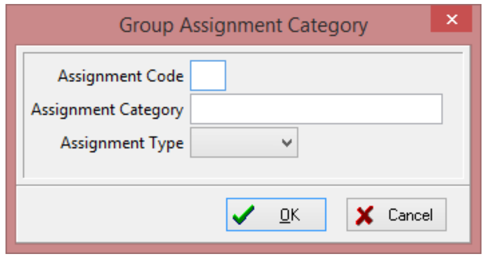
Group Assignment Categories

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.

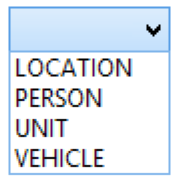
2. Click **Add Category**.



   a. Enter a **Code**.

   b. Enter an **Assignment Category** name.

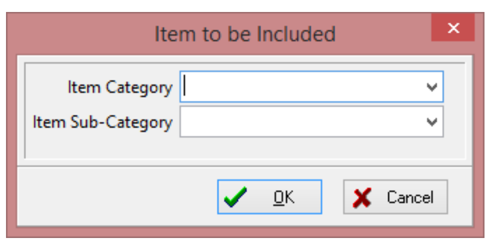
   c. Choose an **Assignment Type** from the drop-down menu.



✓ 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.

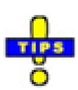
4. Click **Add Item**.



   a. Choose an **Item Category** from the drop-down menu.

   b. Choose an **Item Sub-Category** from the drop-down menu.

   c. Click **OK**.



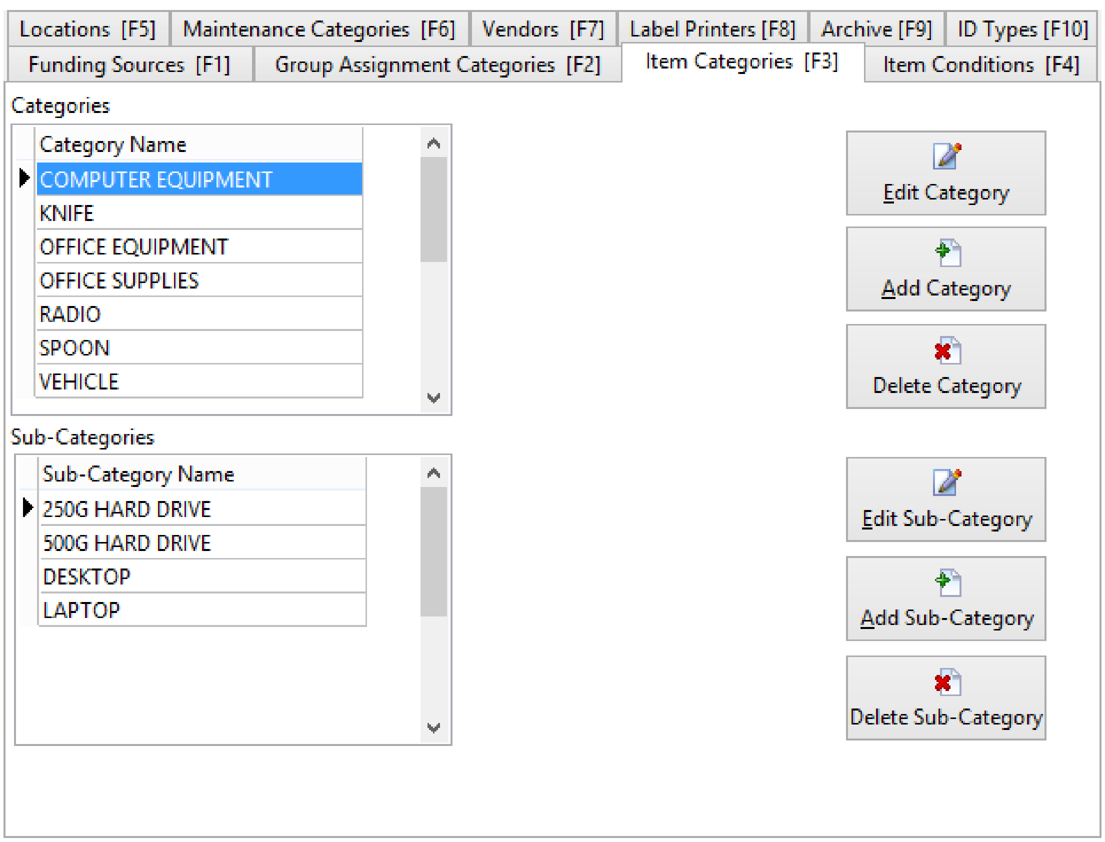
✓ Item categories and sub-categories are configured on the *Item Categories* tab.

5. When finished working with the *Configuration* console, click **Close**.

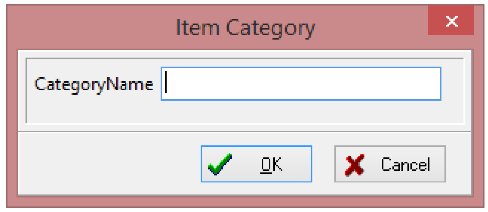
- ✓ The list of *Categories to be Included* shown depends upon the *Group Assignment Category* currently selected.
- ✓ To modify an existing category, highlight it in the list and click on **Edit Category**.
- ✓ To delete a category, highlight it in the list and click on **Delete Category**. Press **[Y]** 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.



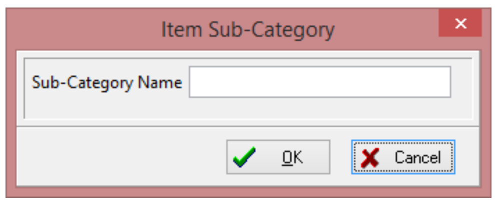
1. Click on the **Item Categories** tab.
2. Click on **Add Category**.



    a. Enter the **Category Name**.

    b. Click **OK**.

3. Highlight a category.
4. Click on **Add Sub-Category**.



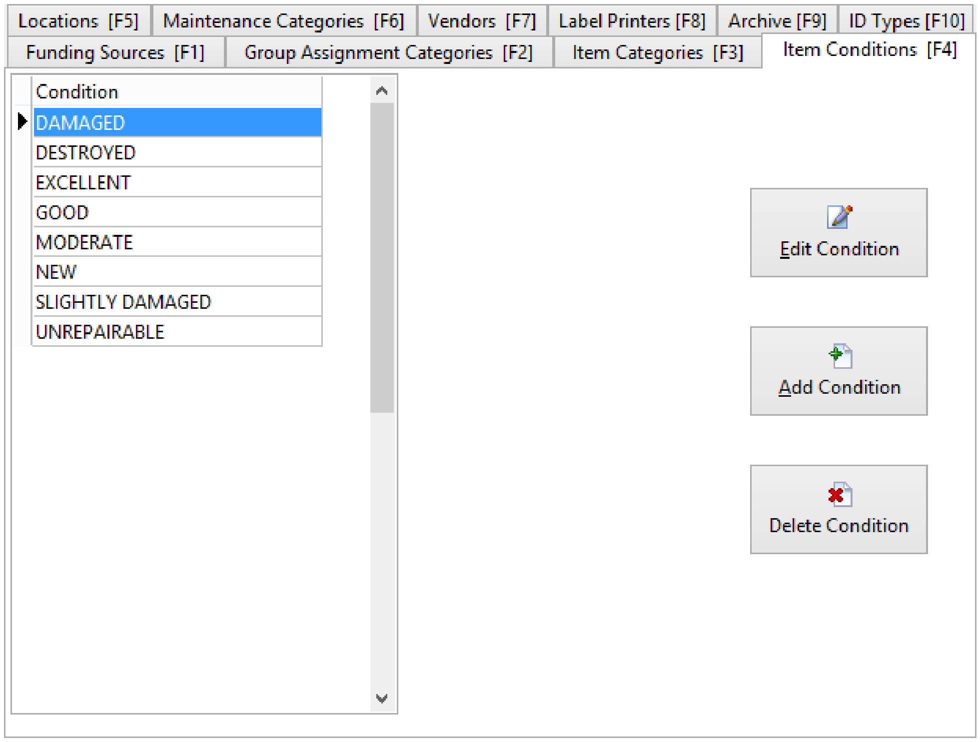
    a. Enter the **Sub-Category Name**.

    b. Click **OK**.

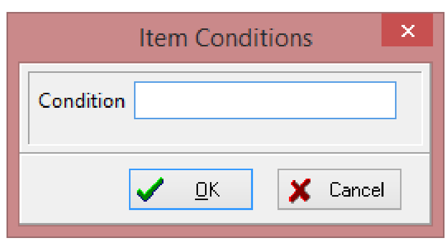
5. When finished working with the *Configuration* console, click **Close**.

Item Conditions

This tab is used to list the various conditions in which the agency's property can be found.



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**.

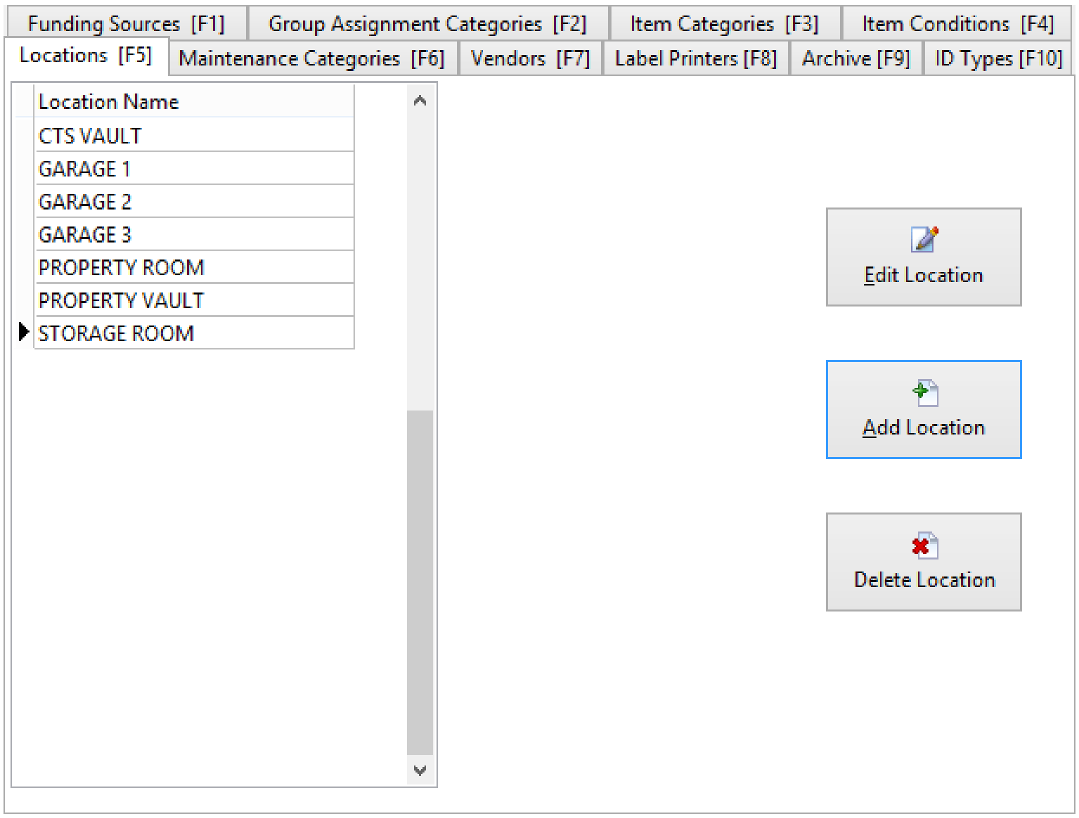
TIPS

✓ To modify an existing condition, highlight it in the list and click on **Edit Condition**.

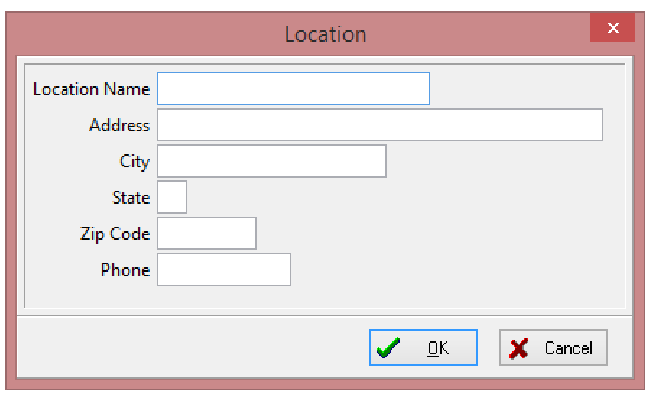
✓ To delete a condition, highlight it in the list and click on **Delete Condition**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **No**.

Locations

This tab is used to list the various storage locations where equipment can be acquired for issuance.



1. Click on the **Locations** tab.
2. Click **Add Location**.



3. Enter the **Location Name**.
4. Enter the location's **Address**, **City**, **State**, and **Zip Code**.
5. Enter the location's **Phone** number.

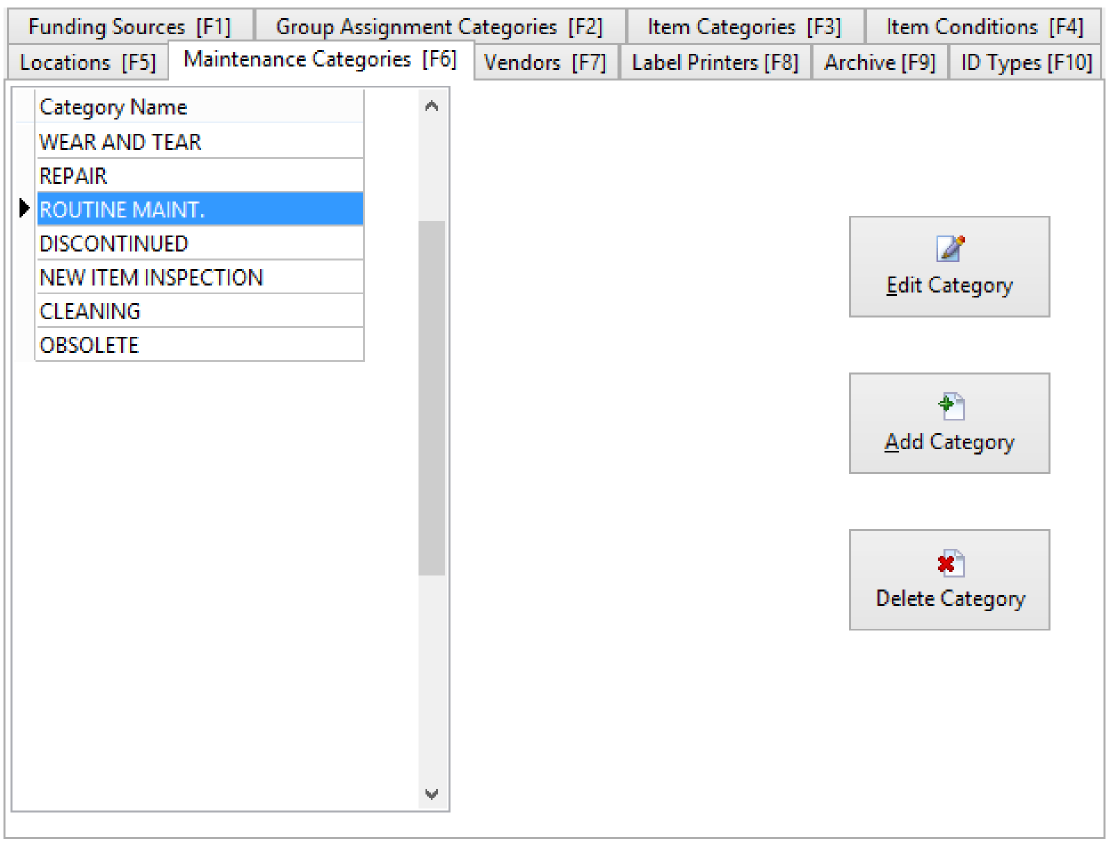
6. Click **OK**.
7. When finished working with the *Configuration* console, click **Close**.

✓ To modify an existing location, highlight it in the list and click on **Edit Location**.

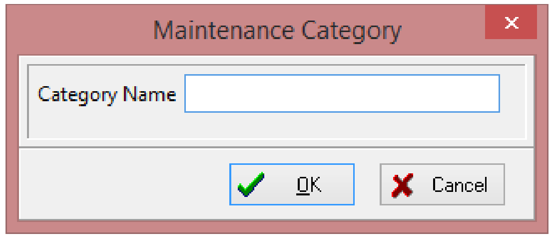
✓ To delete a location, highlight it in the list and click on **Delete Location**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **No**.

Maintenance Categories

This tab is used to list the general maintenance categories under which property upkeep may fall.



1. Click on the **Maintenance Categories** tab.
2. Click **Add Category**.



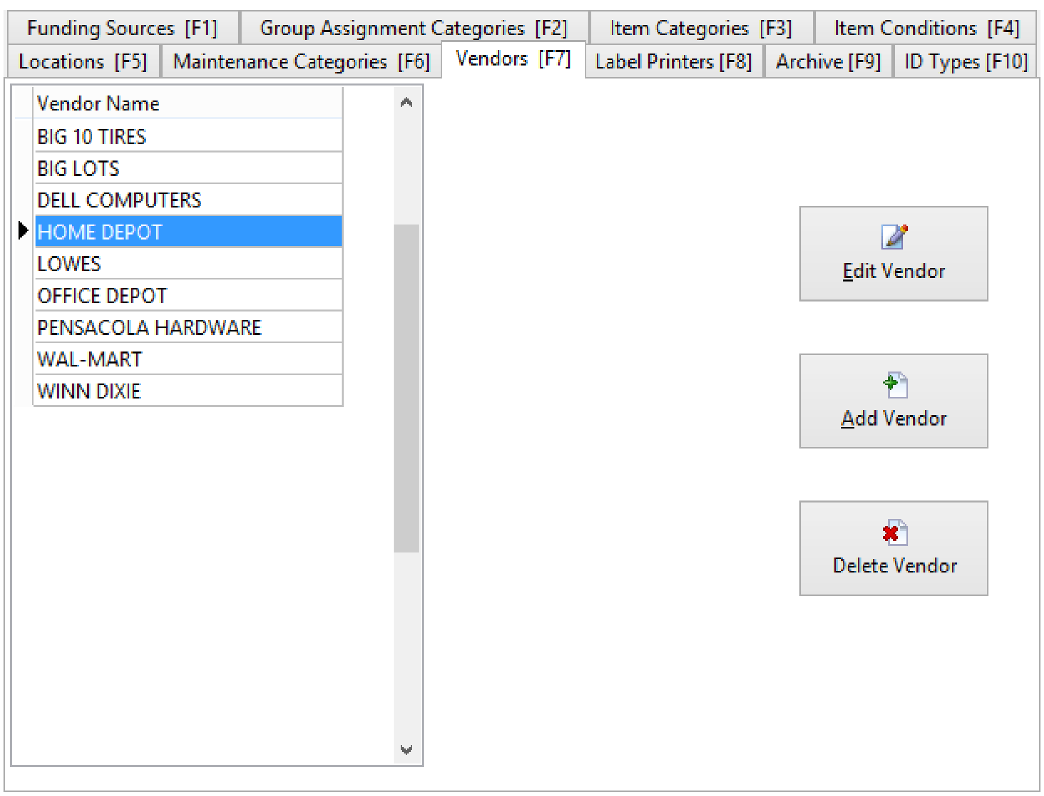
3. Enter a **Category Name**.
4. Click **OK**.
5. When finished working with the *Configuration* console, click **Close**.

TIPS

- ✓ 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**.

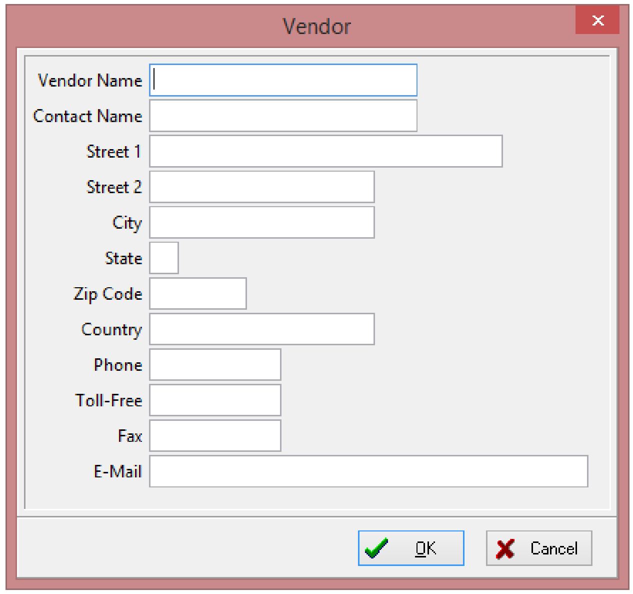
Vendors

This tab is used for listing the various vendors from whom the issued equipment is purchased.



1. Click on the **Vendors** tab.

2. Click **Add Vendor**.



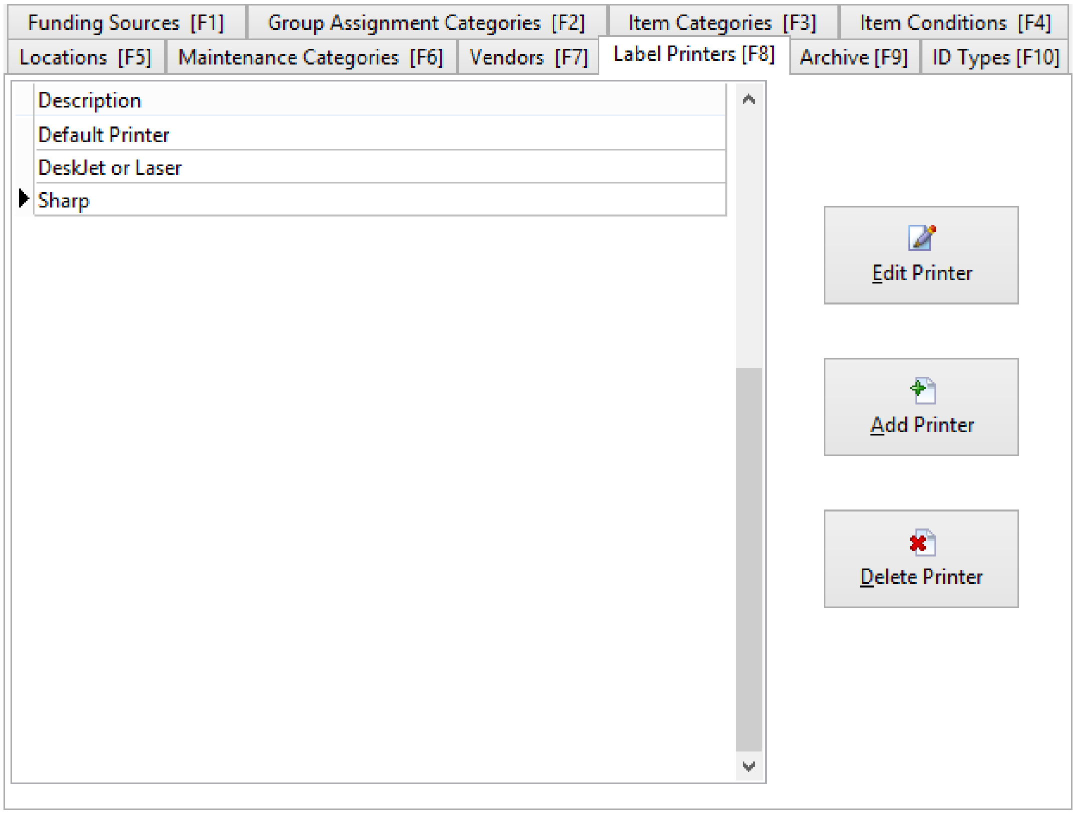
3. Enter the **Vendor Name**.
4. Enter the **Contact Name**.
5. Enter the vendor's address information in **Street 1**, **Street 2**, **City**, **State**, **Zip Code**, and **Country**.
6. Enter the vendor's **Phone** number, **Toll-Free** phone number, and **Fax** number.
7. Enter the vendor's **E-Mail** address.
8. Click **OK**.
9. When finished working with the *Configuration* console, click **Close**.

TIPS

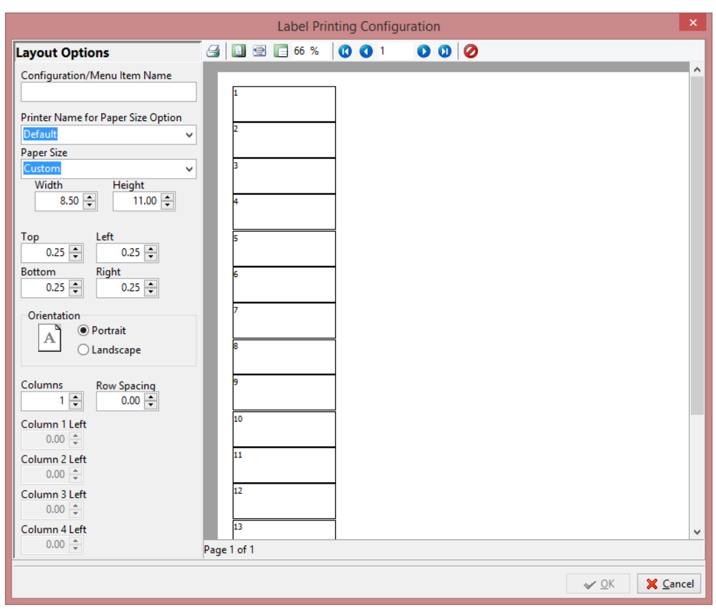
- ✓ To modify an existing vendor, highlight it in the list and click on **Edit Vendor**.
- ✓ To delete a vendor, highlight it in the list and click on **Delete Vendor**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **No**.

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.



1. Click on the **Label Printers** tab.
2. Click **Add Printer**.



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**.

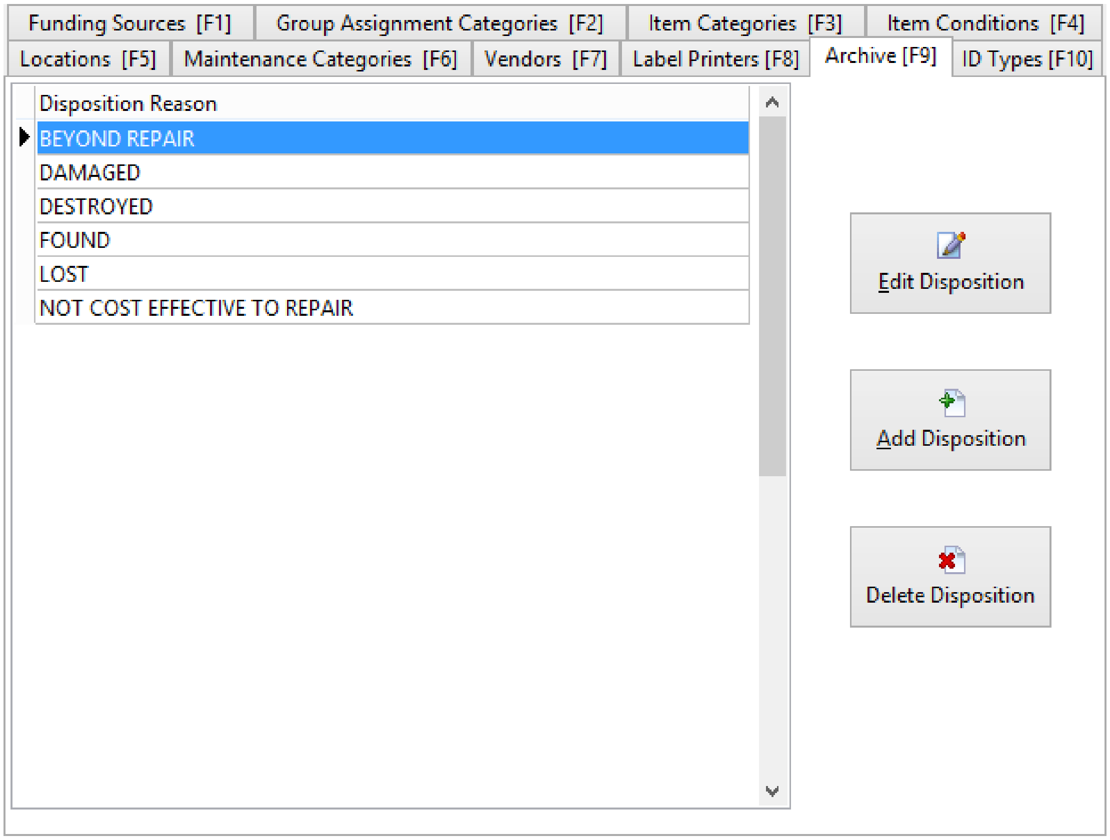
TIPS

✓ To modify an existing printer, highlight it in the list and click on **Edit Printer**.

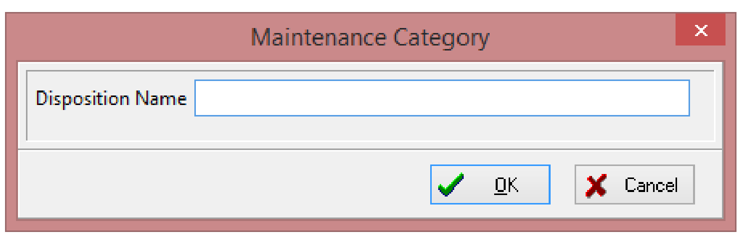
✓ To delete a printer, highlight it in the list and click on **Delete Printer**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **No**.

Archive

This tab is used to customize the available disposition reasons used when archiving property records.



1. Click on the **Archive** tab.
2. Click **Add Disposition**.

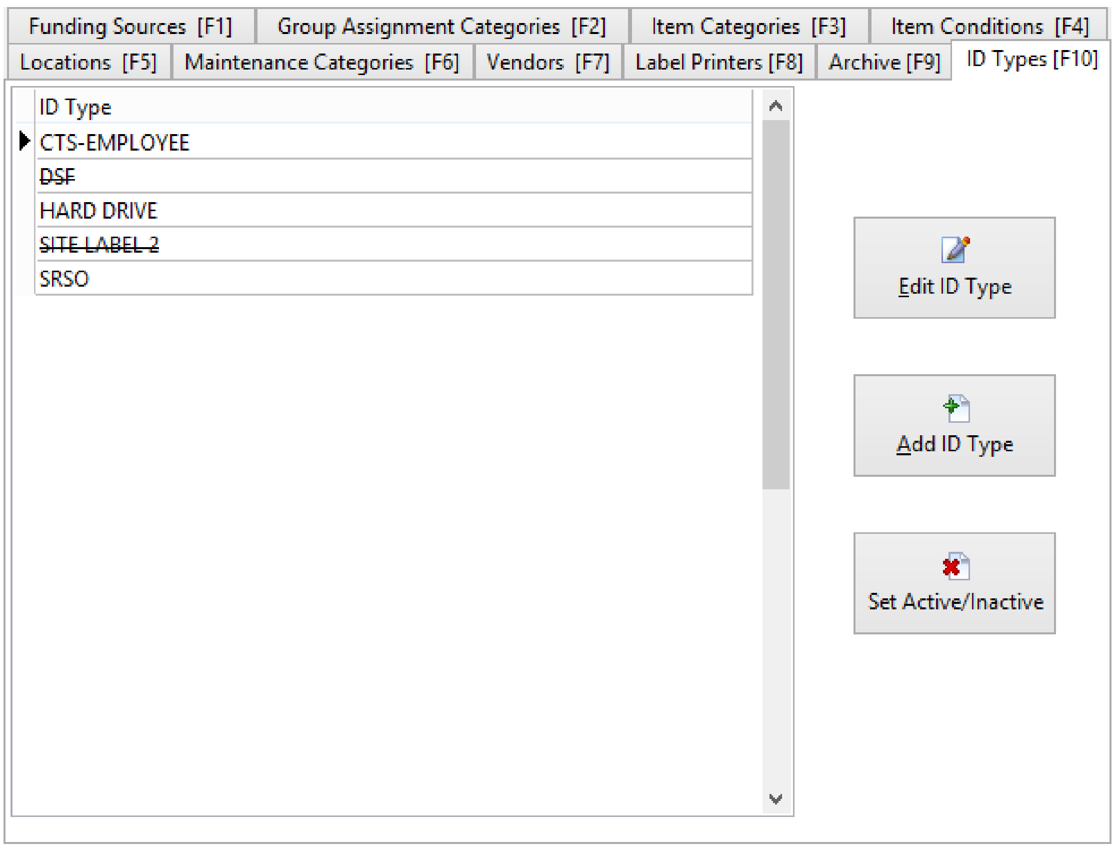


3. Enter a **Disposition Name**.
4. Click **OK**.
5. When finished working with the *Configuration* console, click **Close**.

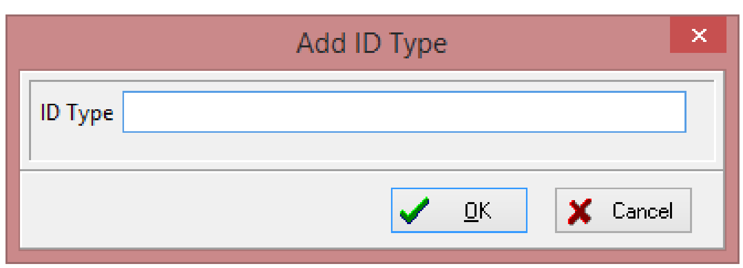
- ✓ To modify an existing disposition, highlight it in the list and click on **Edit Disposition**.
- ✓ To delete a disposition, highlight it in the list and click on **Delete Dispostion**. Press **[Y]** or click **Yes** to confirm the deletion. Otherwise, press **[N]** or click **No**.

ID Types

This tab is used for designating the types of IDs that may be assigned to property items.



1. Click on the **ID Types** tab.
2. Click **Add ID Type**.



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**.

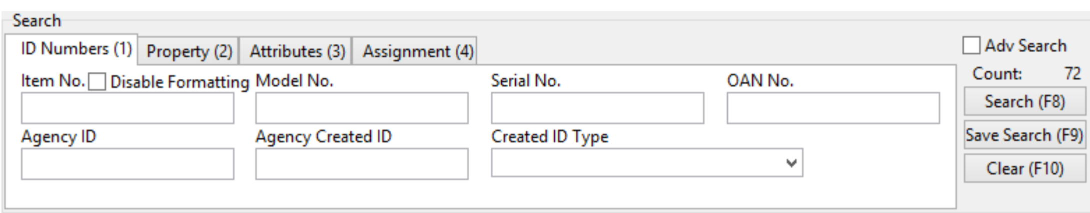
- ✓ To edit an existing ID type, highlight it and click **Edit ID Type**.
- ✓ ID types cannot be deleted, but they can be disabled. Select the ID type to be modified and click **Set Active/Inactive** to toggle between *Active* and *Inactive*.
- ✓ An inactive ID type is marked with a line through the text (~~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*.



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.

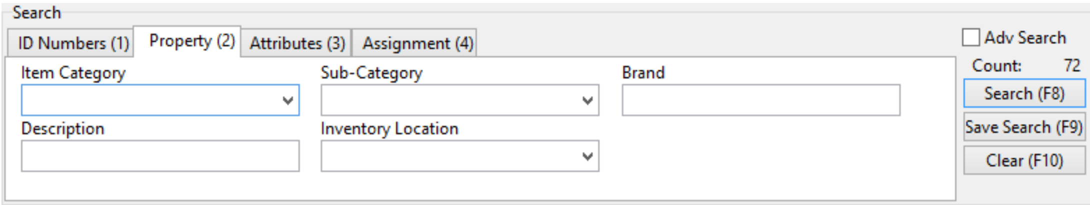
3. Double-click the desired record or highlight it and click on **View Item**.

- ✓ 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

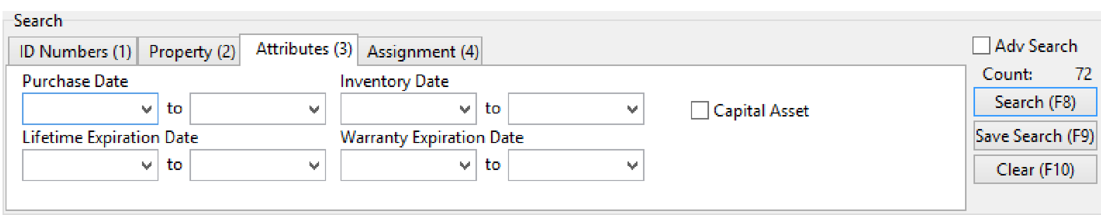
Use this tab to search all records by *Item Category*, *Sub-Category*, *Brand*, *Description*, and/or *Inventory Location*.



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

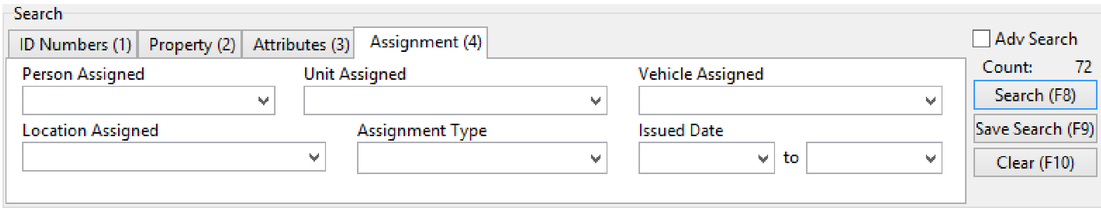
Use this tab to search all records by *Purchase Date* (range), *Inventory Date* (range), *Lifetime Expiration Date* (range), *Warranty Expiration Date* (range), and *Capital Asset* (check).



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).



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**.

TIPS

✓ 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).

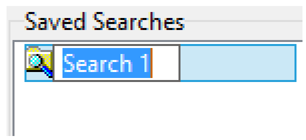
Conducting an Advanced Search

1. Place a check beside **Adv Search** to us multiple search tabs for more specific results.
2. Enter search criteria in all necessary tabs (ID Numbers, Property, Attributes, Assignment).
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.



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

- ✓ Hover the mouse over a saved search folder to reveal the search criteria.
- ✓ 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.

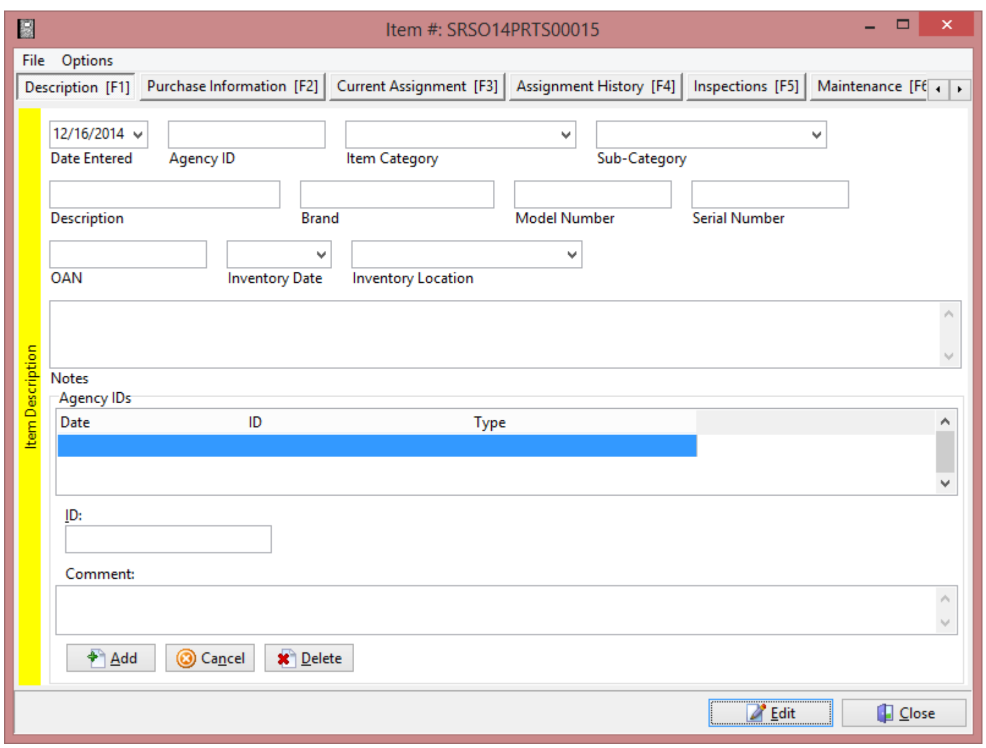
Property Record Color-Coding

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

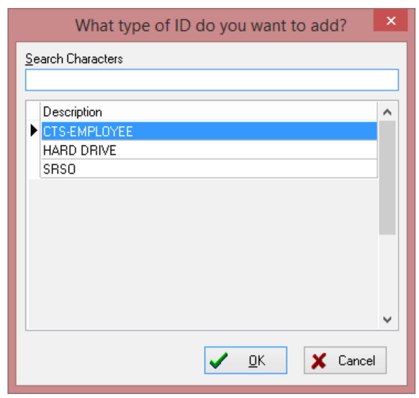
Adding a Single Property Item

1. Click **Add Item(s)** and select **Single Item** or press **[Alt+S]**.

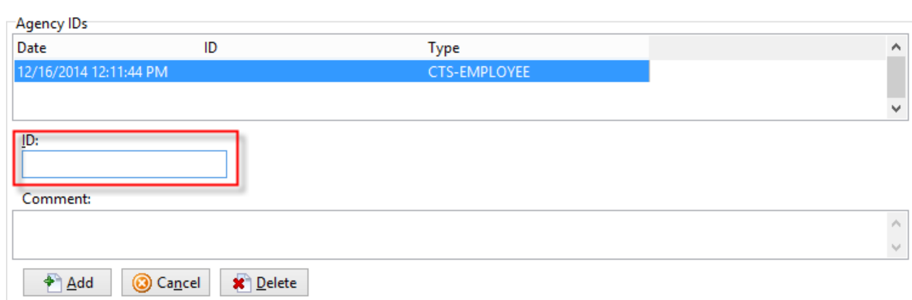


The *Description* tab is selected by default and the current date is pre-populated in the *Date Entered* field.

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**.



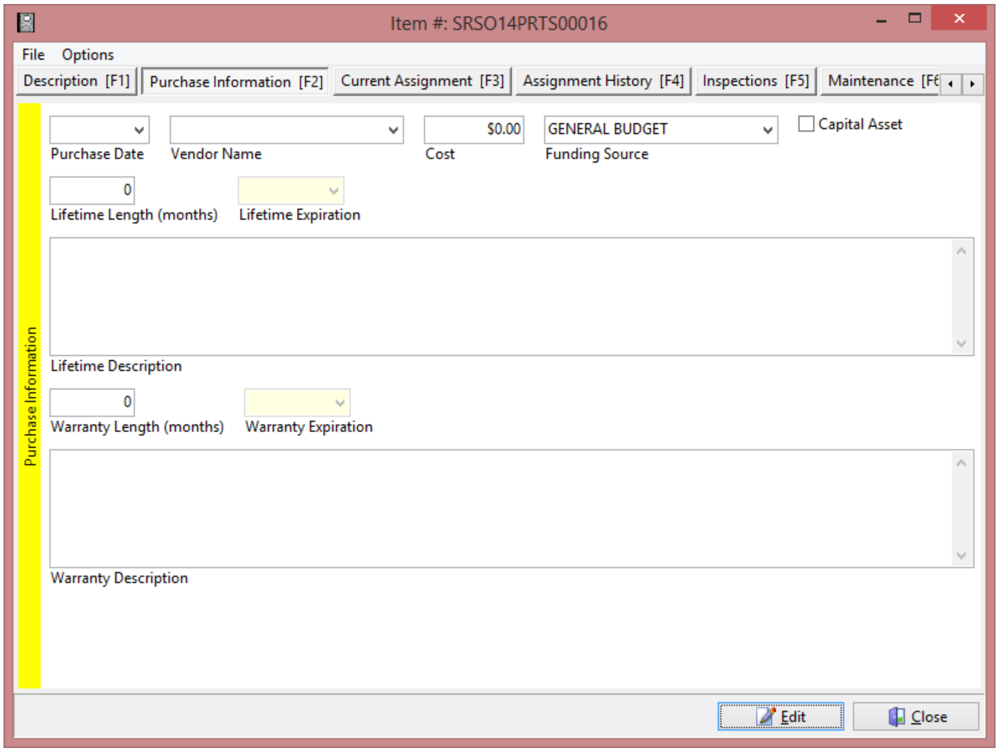
    b. Choose the type of ID to be created and click **OK**.
    c. Enter the **ID** number in the field below the list.



✓ 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]**.



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**.

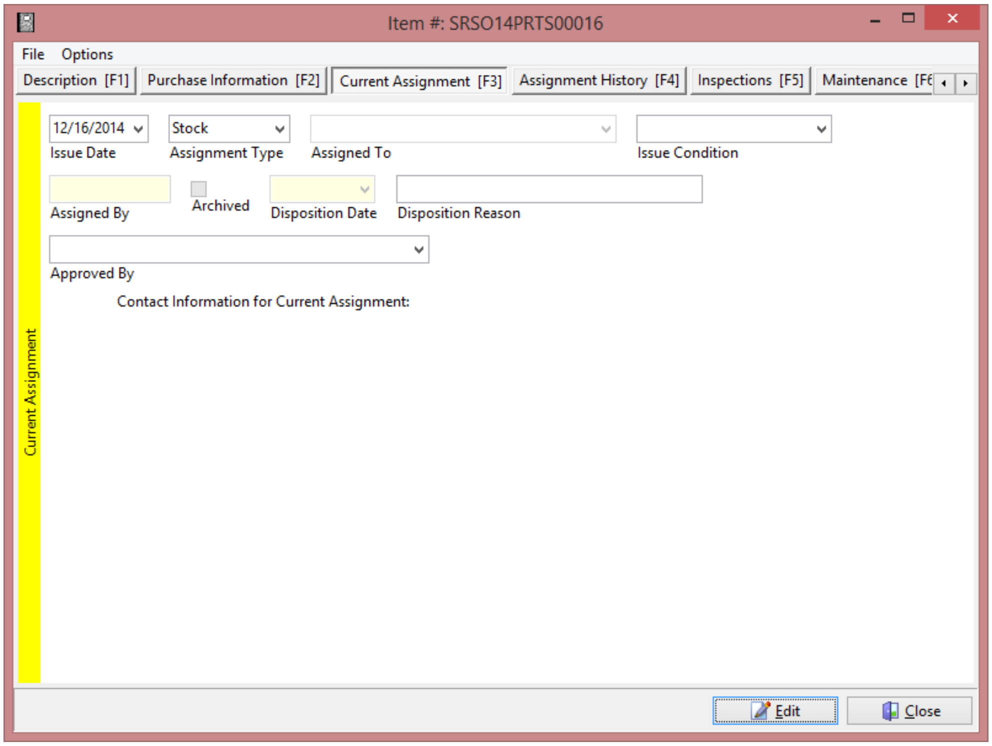
18. Enter the anticipated **Lifetime Length** (in months) for the item. The *Lifetime Expiration* field automatically calculates the date based on the *Purchase Date* and the *Lifetime Length*.

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]**.



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**.

TIPS

✓ Only users with full access (FA) to run Issued Property granted in *Employee Master* can enter or view purchase information.

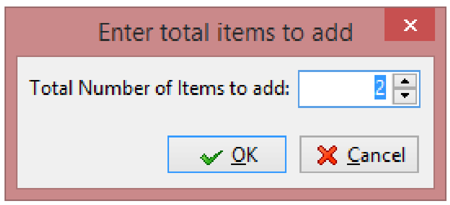
✓ The *Archived* check box, *Disposition Date* and *Disposition Reason* will only be populated when an item is taken out of commission.

- ✓ 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 Adding a Single Property Item, 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**.

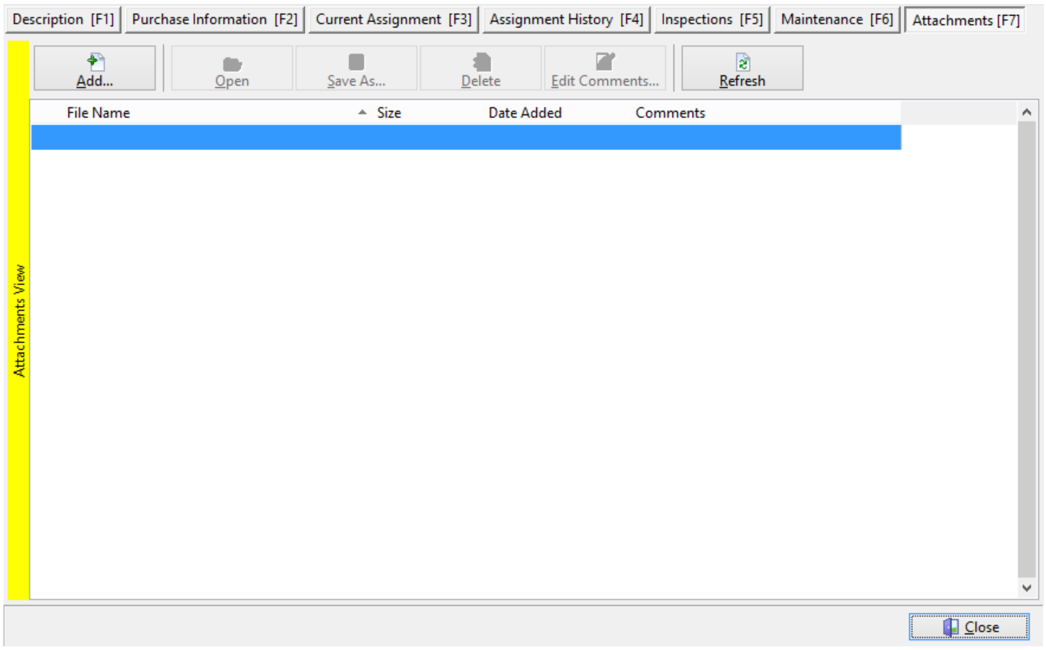


4. Enter the **Total Number of Items to add**.
5. Click **OK**.

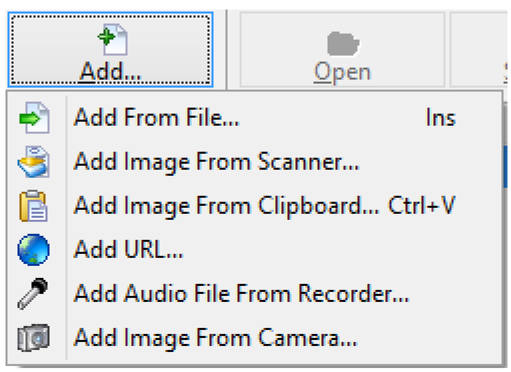
The designated number of property items are created, including the original.

Adding Attachments

Within the *Attachments* tab files relating to the vehicle may be uploaded to the server for reference when making considerations.



1. Click on the **Attachments** tab.

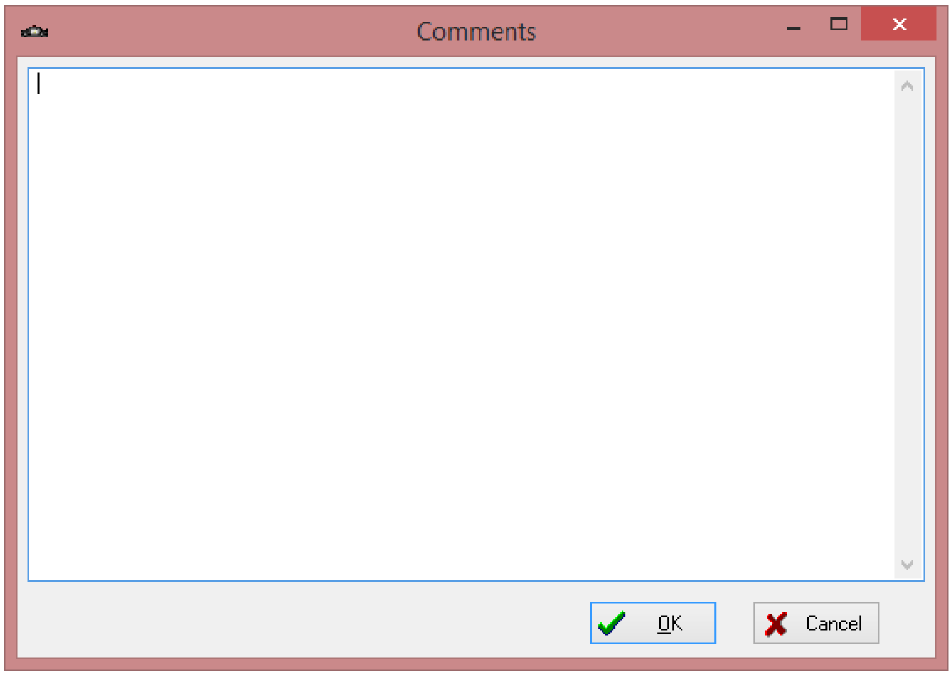


2. Choose the source for the attachment.

   - **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**.



4. Enter a brief description of the attachment.
5. Click **OK**.

TIPS

✓ 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

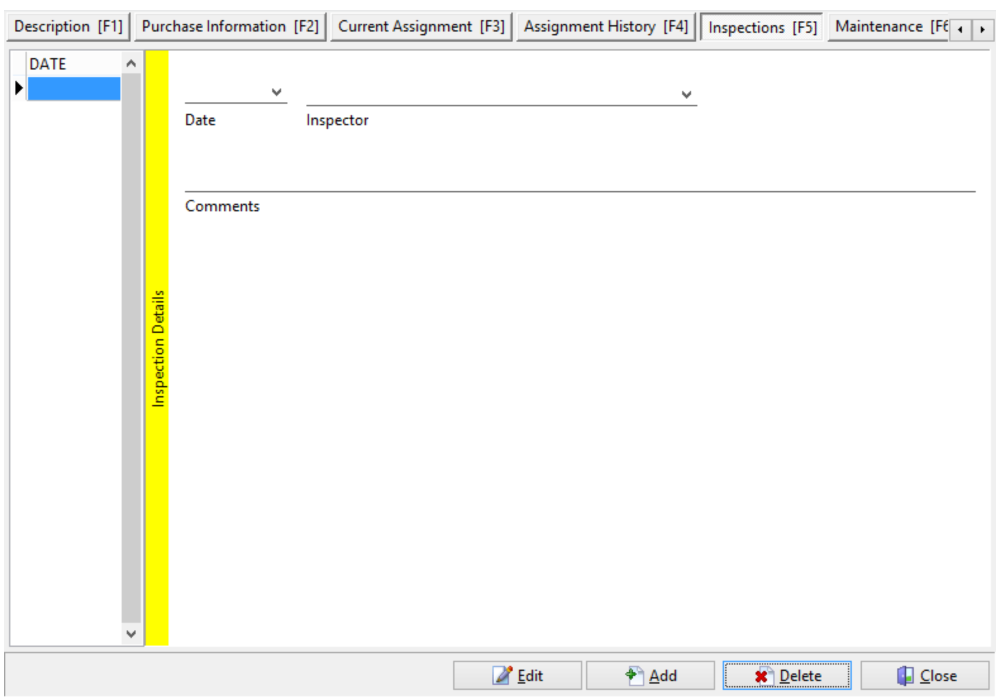
1. Search for, and open, the record to be modified.
2. Use the tabs at the top of the screen to move to different parts of the record. Click **Edit** and make changes as needed on each tab.
3. When finished, click **Close**.

- ✓ 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.

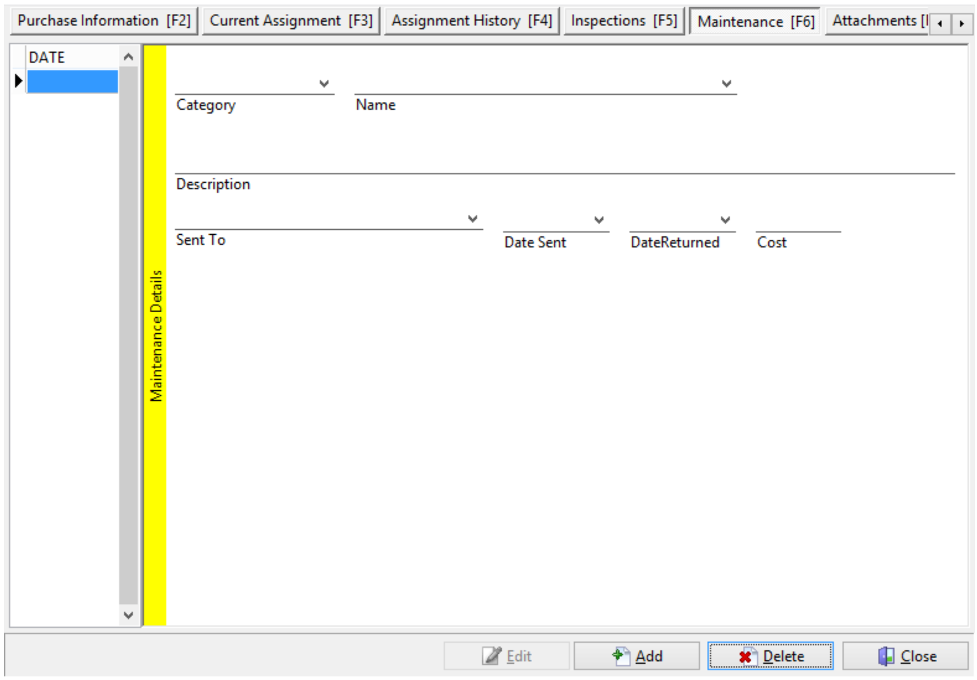


3. Click **Edit**.
4. If needed, change the **Date**. When a new inspection record is created, the current date is automatically inserted.
5. Choose the **Inspector** from the drop-down menu.

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.



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**.

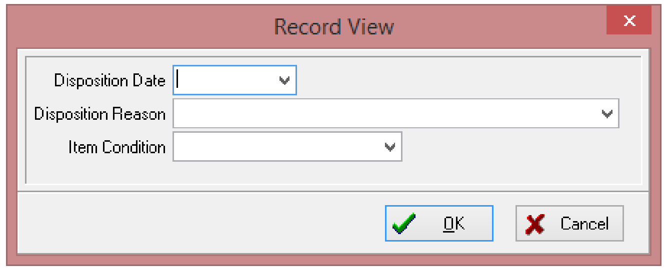
Archiving and Un-archiving Property Records

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**.



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.

- ✓ 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**.

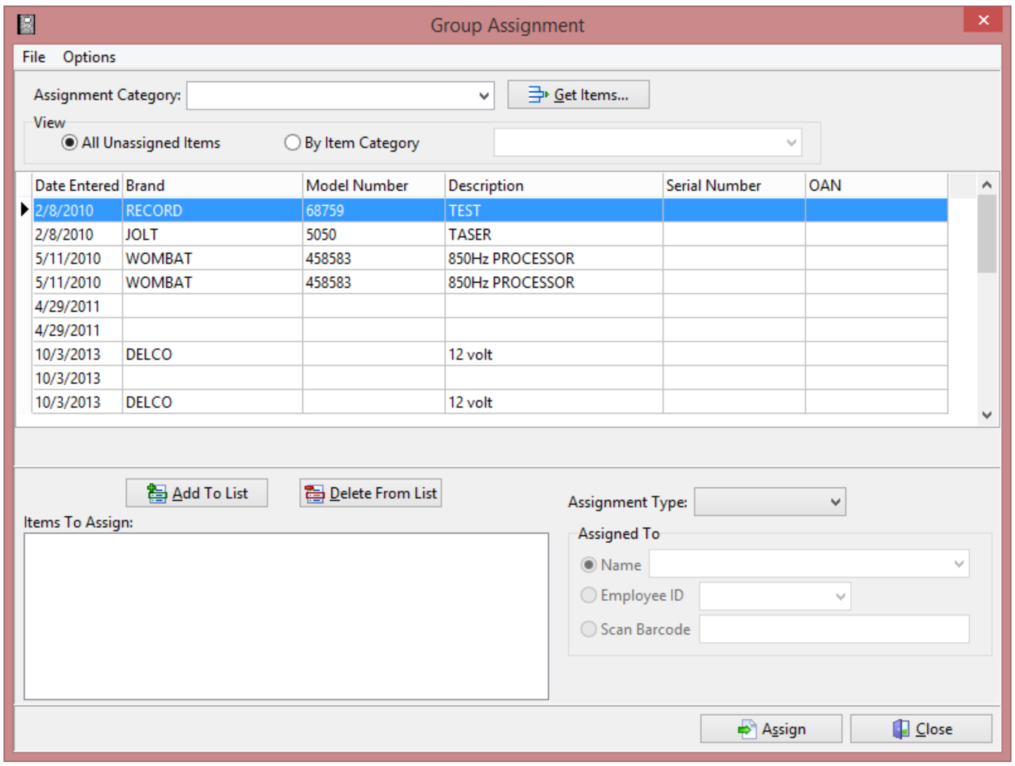
4. Press **[Y]** or click **Yes** to un-archive the record. Otherwise, press **[N]** or click **No**.

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**.



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 drop-down 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 Number	Prints labels for all items with bar codes and the corresponding 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 *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*) • **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 vehicle
By Brand	Lists all items according to the specified brand 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 Category	Lists all items according to the specified category (and, if desired, sub-category) 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 Funding Source	Lists all items according to the specified funding source 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 Lifetime Expiration Date	Lists all items according to the specified lifetime expiration date range 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 Purchase Date	Lists all items according to the specified purchase date range 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*)

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 Date	Lists all items according to the specified warranty expiration date range 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*)
Capital Assets	Lists all items specified as capital assets including the *Property 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, vehicle, or location (*Assigned To*)
Inspections	Lists all inspections for the specified item category on the specified date including the *Property Number* (with bar code), *Description*, *Brand*, *Model Number*, *Serial Number*, *Serial Number*, Owner Applied Number (*OAN*), *Capital Asset* status (check), *Inventory Date*, Inventory Location (*at*), *Last Inspection Date*, Inspection *Comments*, *Issue Date*, Issue *Condition*, and the assigned person, unit, vehicle, or location (*Assigned To*)
Item Details	Lists the details of the specified property item, including the *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*, *Issue 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 (*OAN*) for each, ordered by the date entered
Labels By Item Number Range	Prints labels for all items within the specified property number range with bar codes and the corresponding owner applied number (*OAN*) for each, ordered by the property number

TIPS

- ✓ 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
  - Capital Assets
  - Inspections
  - Item Details
- ✓ Individual item labels can be printed from within property records.

Chapter 6

Training

Version 1.0

User Manual

Printed December 18, 2014

cts-america.com

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

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Table of Contents

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.
N	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*.
N	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.
N	The user is unable to delete classes within a lesson plan.

Delete Course

Y	The user is able to delete courses in *SmartAdmin*.
N	The user is unable to delete courses.

Edit Settings

Y	The user is able to edit *SmartAdmin* settings.
N	The user is unable to change settings in *SmartAdmin*. They may only be viewed.

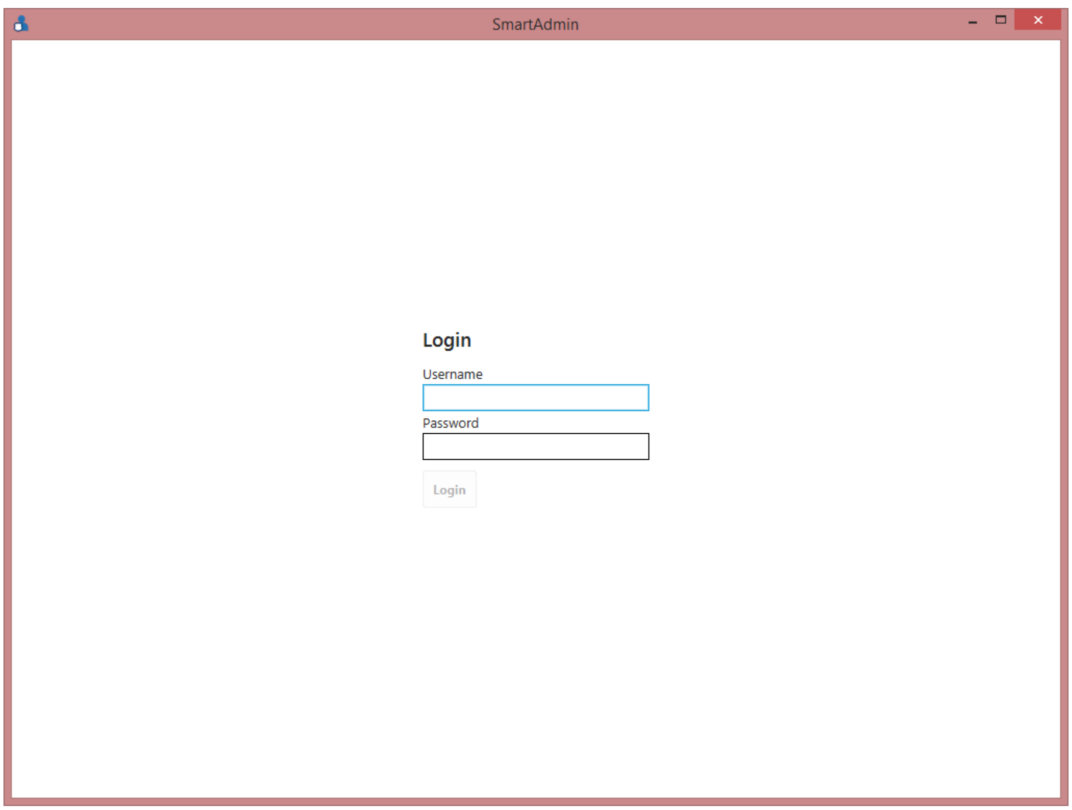
Run

FA	The user is able to access *SmartAdmin* and edit records not specifically denied by other permissions.
LA	The user is able to access *SmartAdmin*. 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. Class information may still be viewed, however.

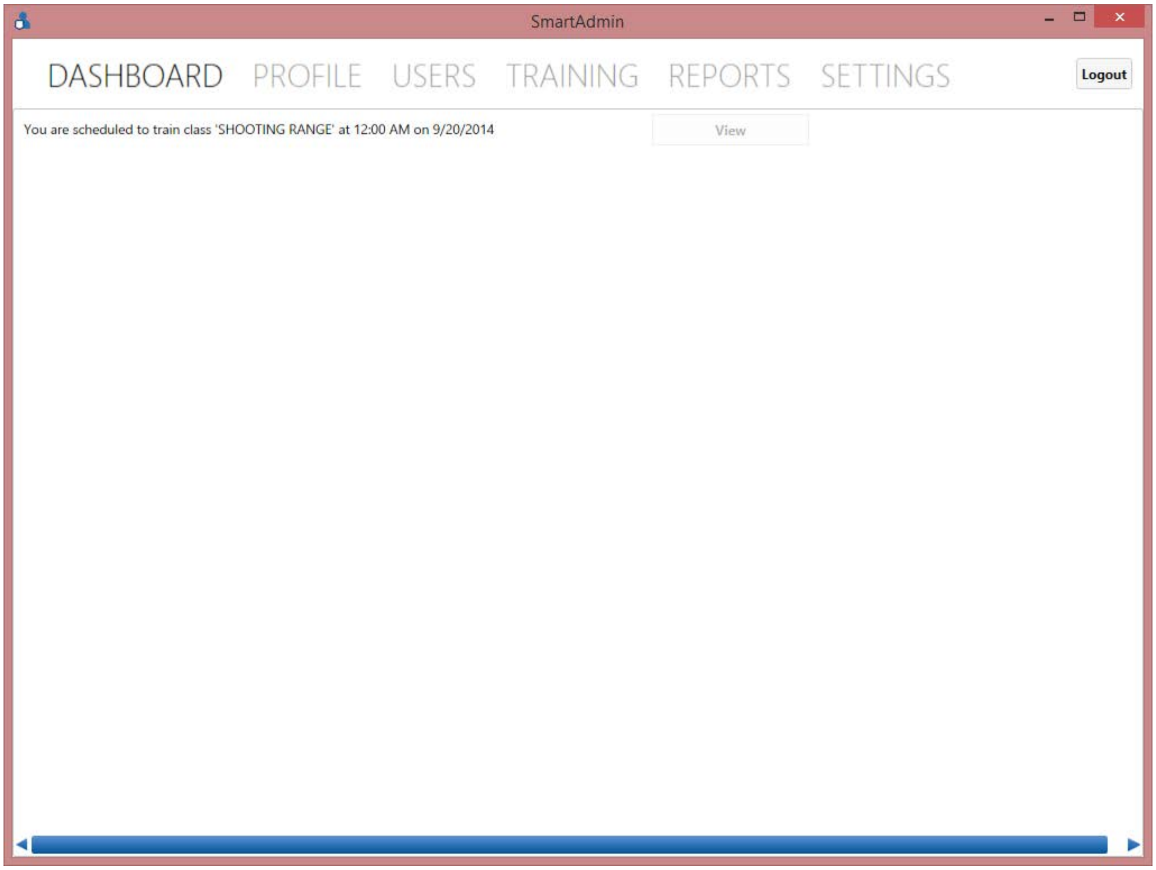
Logging In



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.

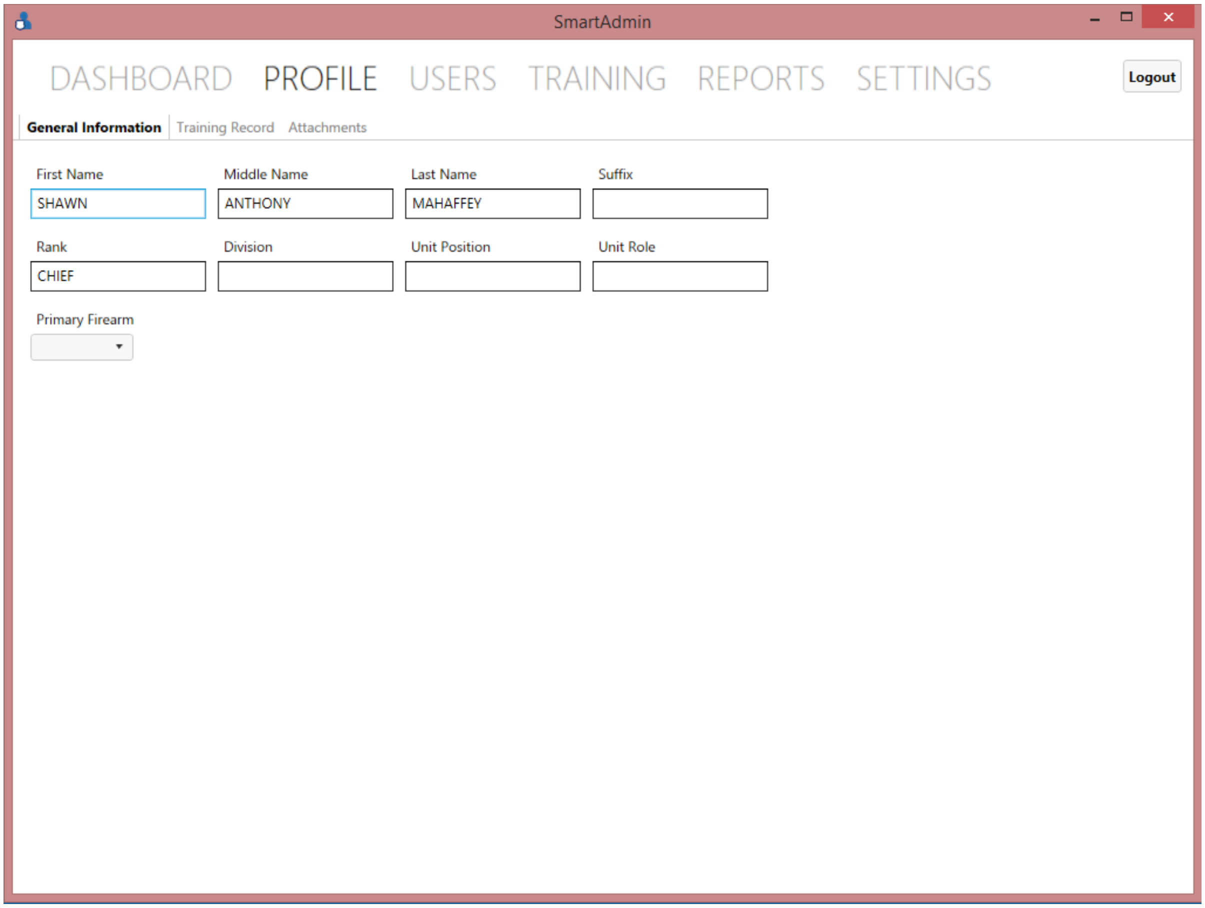
1. Enter the **Username** and **Password**.
2. Press **[Enter]** or click **Login**.

Dashboard

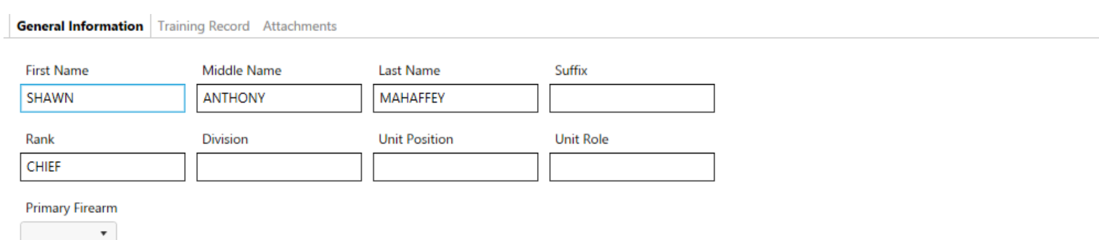


The *Dashboard* tab displays any classes the current user is scheduled to teach or attend. It also allows the user to go directly to that class record to modify or download materials, depending upon permission levels. It is blank, if no information is available.

Profile

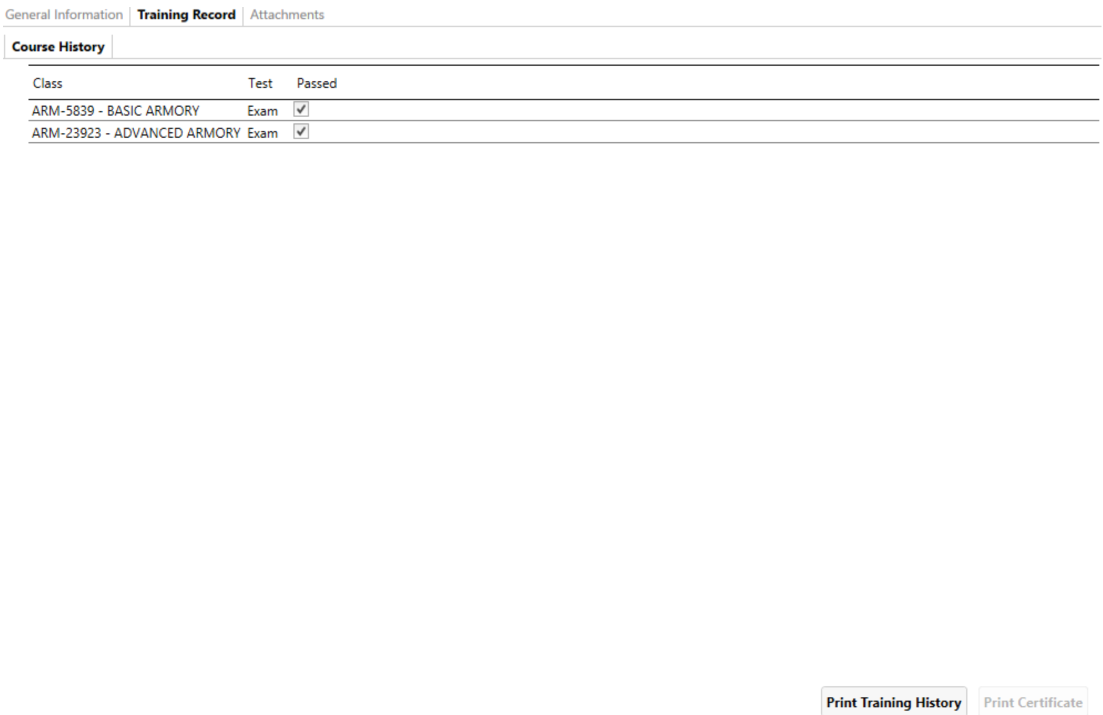


General Information



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.

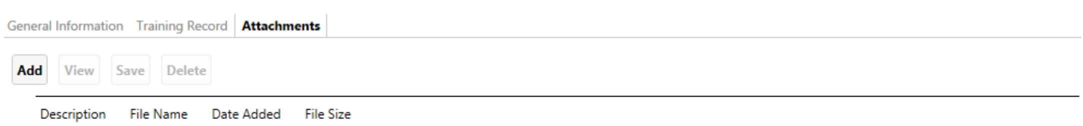
Training Record



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

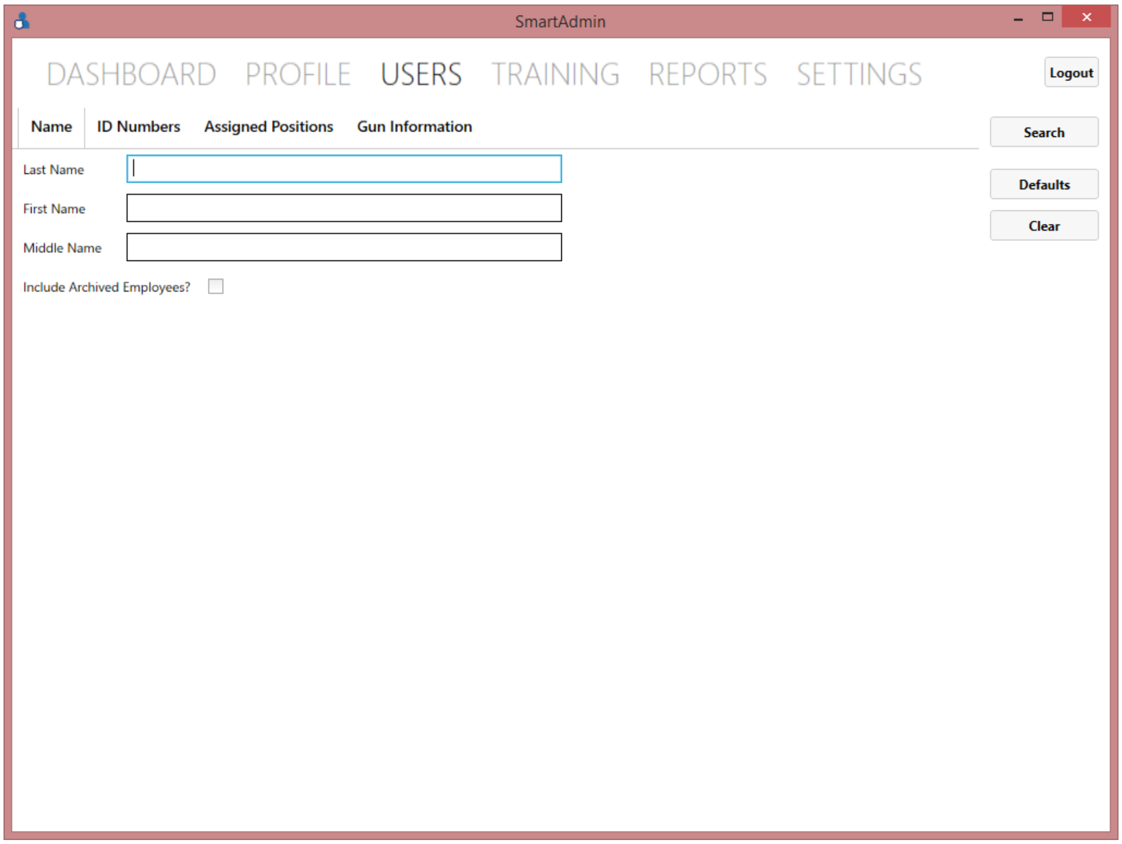


Attachments may be added, viewed and deleted using the toolbar at the top of the *Attachments* tab.

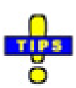
- **Add**: Associate a new attachment with the user profile.
    - After clicking *Add*, navigate to the desired file on the local computer, a USB device, or a network location, and click **Open**.
- **View**: View the currently selected attachment.

- **Save**: Save a copy of the selected attachment on the local computer.
- **Delete**: Delete the selected attachment from the user profile.

Users

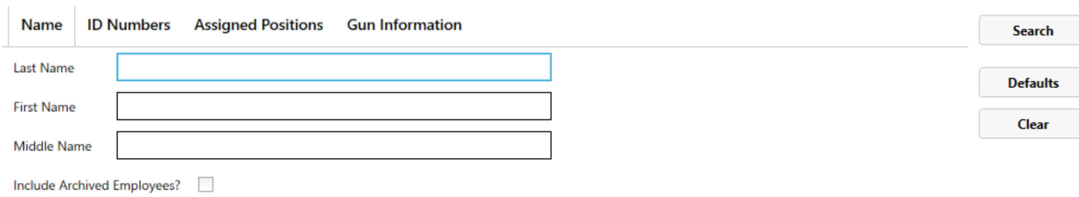


If permissions allow such, the *Users* tab allows the user can search the employee listing and view information about the selected record. The *Search* button is grayed out if the current user is denied user searching access. Available information about each user is the same as that available on the *Profile* tab about the current user.



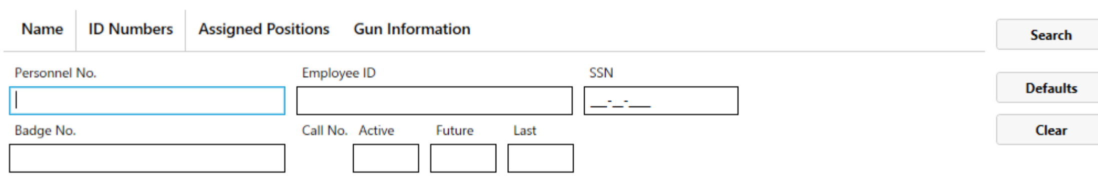
- ✓ Clicking **Search** without entering any search criteria will pull all active Employee records.
- ✓ Include as much information as possible to limit the results returned.
- ✓ Click **Clear** to remove the current search criteria and any results obtained using them.

Search by Name



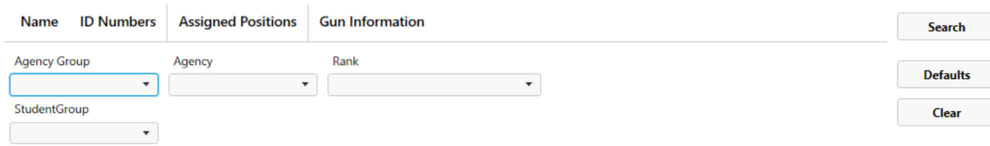
1. Enter the desired user's **Last Name**, **First Name**, and **Middle Name**, as available.
2. If desired, place a check beside **Include Archived Employees?**. This will expand the search to include user who are no longer employed by the agency.
3. Click **Search**.
4. Highlight the desired record, and click **View Employee Record**.

Search by ID Numbers



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



1. Choose one or more criteria from the drop-down menus.

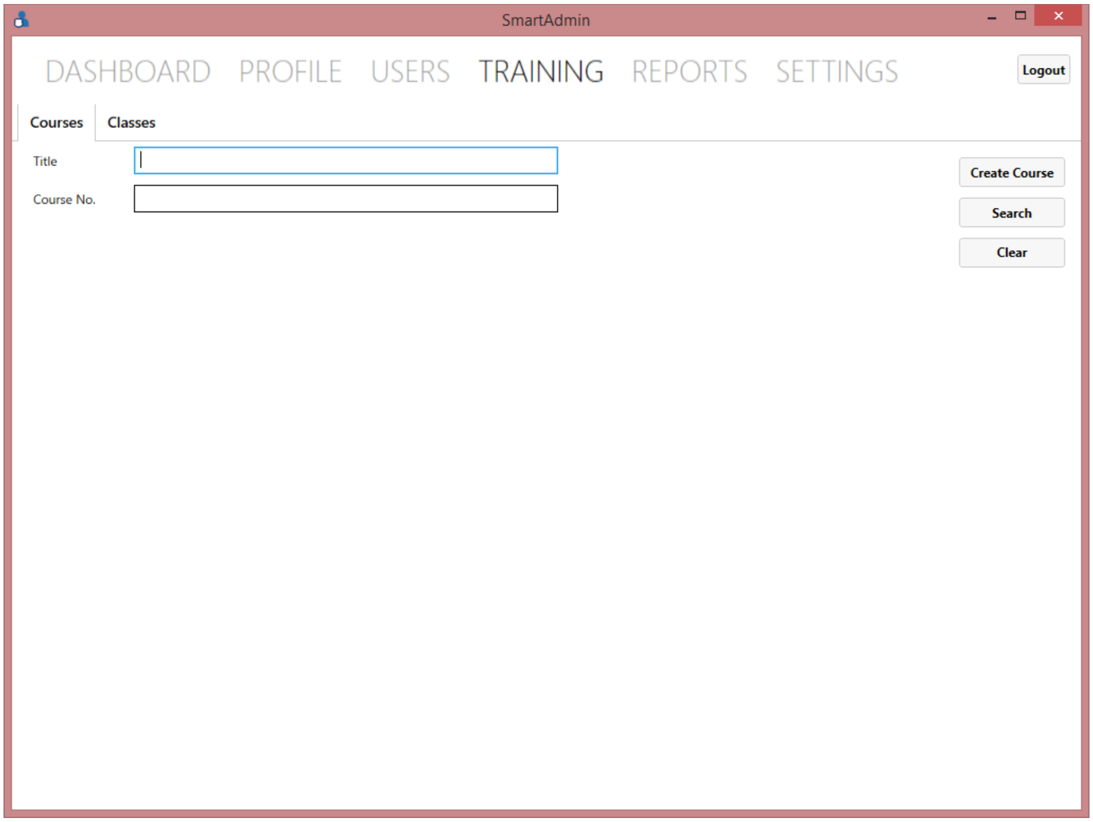
Agency Group	These are configured on the *Agency Grouping* tab of *Settings*.
Agency	These are pulled from *Master Configuration*.
Rank	These are pulled from *Master Configuration*.
Student Group	These are configured in the *Student Grouping* tab of *Settings*.

2. Click **Search**.
3. Highlight the desired record, and click **View Employee Record**.

Search by Gun Information

1. Enter the firearm's **Serial Number**.
2. Click **Search**.
3. Highlight the desired record, and click **View Employee Record**.

Training

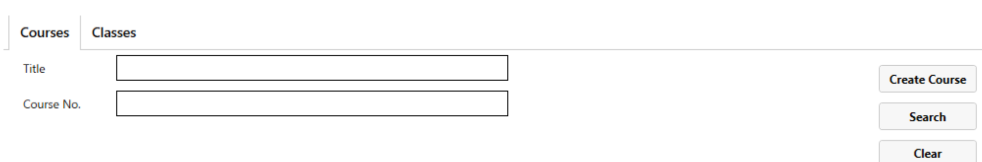


The *Training* tab is used to search for, and create, courses. It is also used for creating the classes within each course.

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

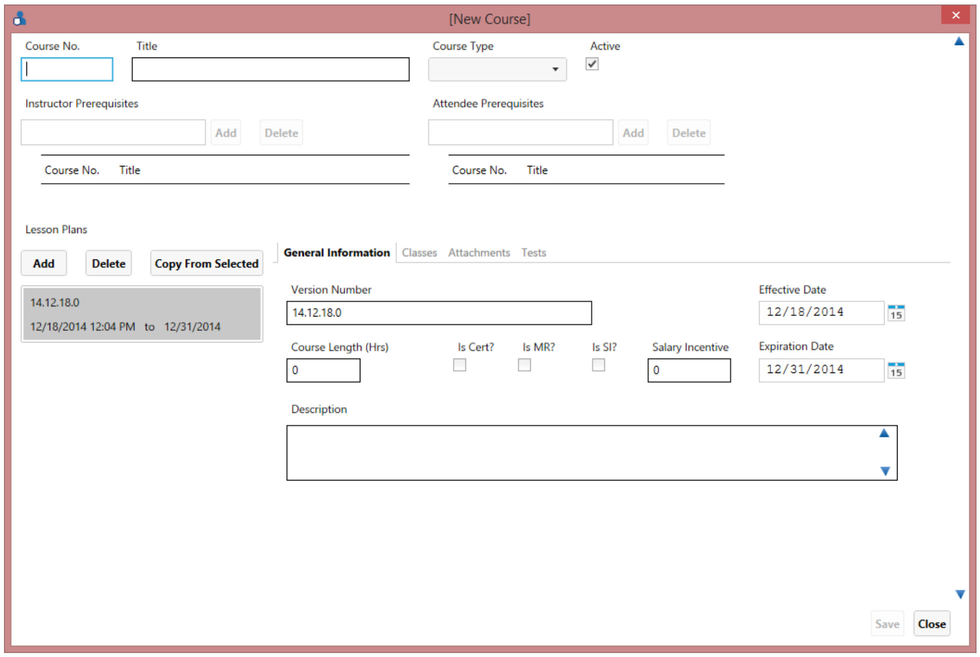


1. Enter the **Title** or the **Course Number** for the course in question.
2. Click **Search**.
3. Highlight the desired course record and click **View Course** at the bottom of the window.

✓ 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**.



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**.

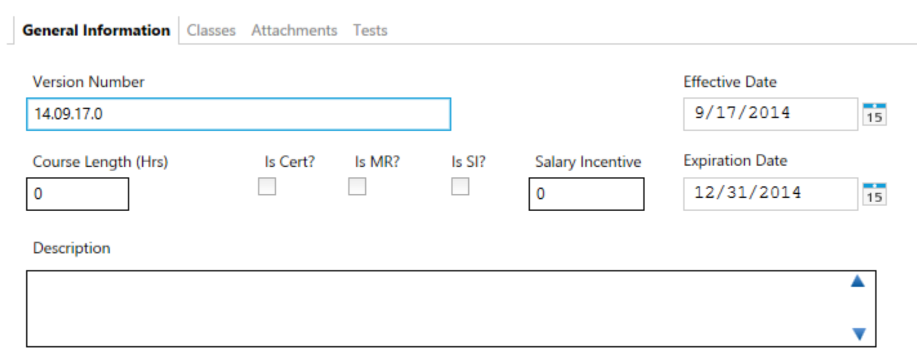
    ✓ If a prerequisite is not needed, highlight the course in the list and click **Delete**.

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



1. The **Version Number** is automatically populated according to the configurations set on the *Settings* tab. Change this, if necessary.

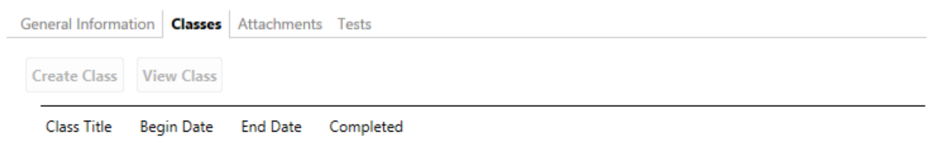
2. The **Effective Date** of the lesson plan is automatically populated with the date the plan was created. Change this, if necessary.

    ✓ 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*.

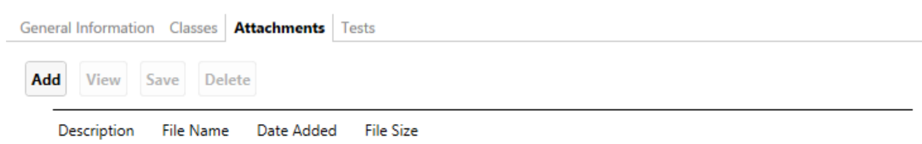
3. The **Expiration Date** is automatically set to the end of the current year (e.g. 12/31/2014). Change this, if necessary.
4. Enter the **Course Length** in hours.
5. Use the check boxes to indicate this is a certification (**Is Cert?**), mandatory re-training (**Is MR?**) or there is a salary incentive (**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



This tab is used to create and administer classes associated with the current lesson plan. Refer to Classes 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.
- ✓ Click **Save** to save a copy of the attachment on the local computer.

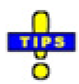
- ✓ Click **Delete** above the *Class Attachments* list to remove the attachment from the class record.

Tests

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**.

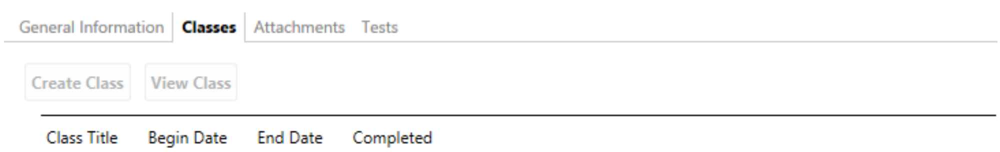
Classes

Searching Class Records

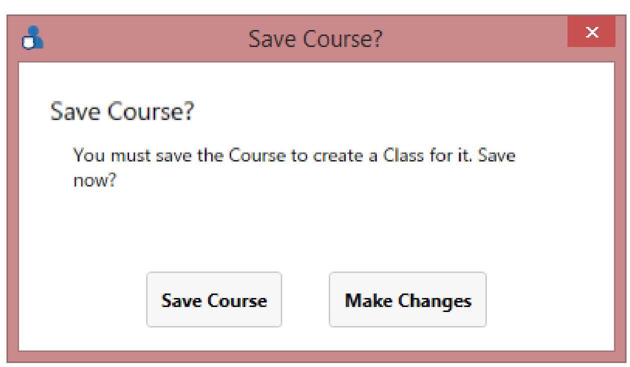
Enter criteria in the search fields to limit the number of results received.

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 *Completed*, place a check here. By default, completed classes are not included in the search results.

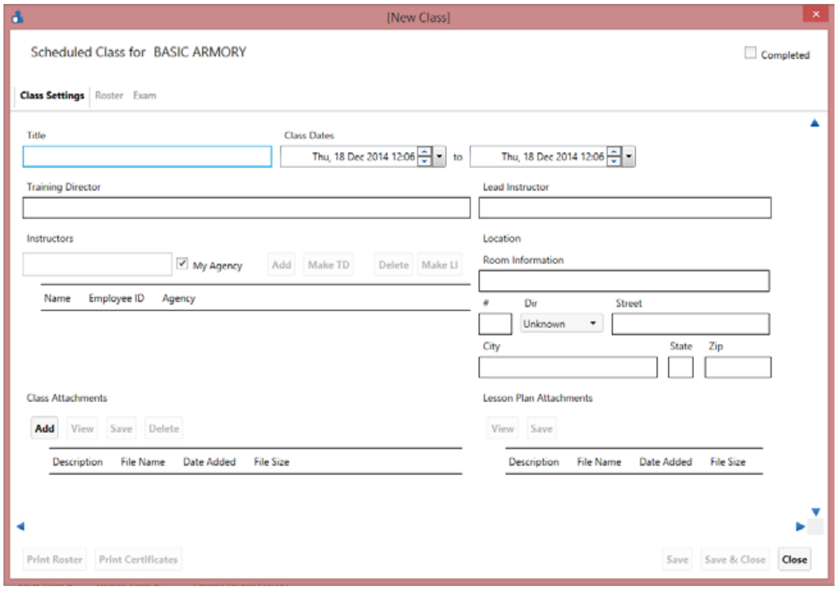
Creating a Class Record



1. Click **Create Class**.



2. Course information must be saved prior to creating a class. Click **Save Course** to continue.



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*.

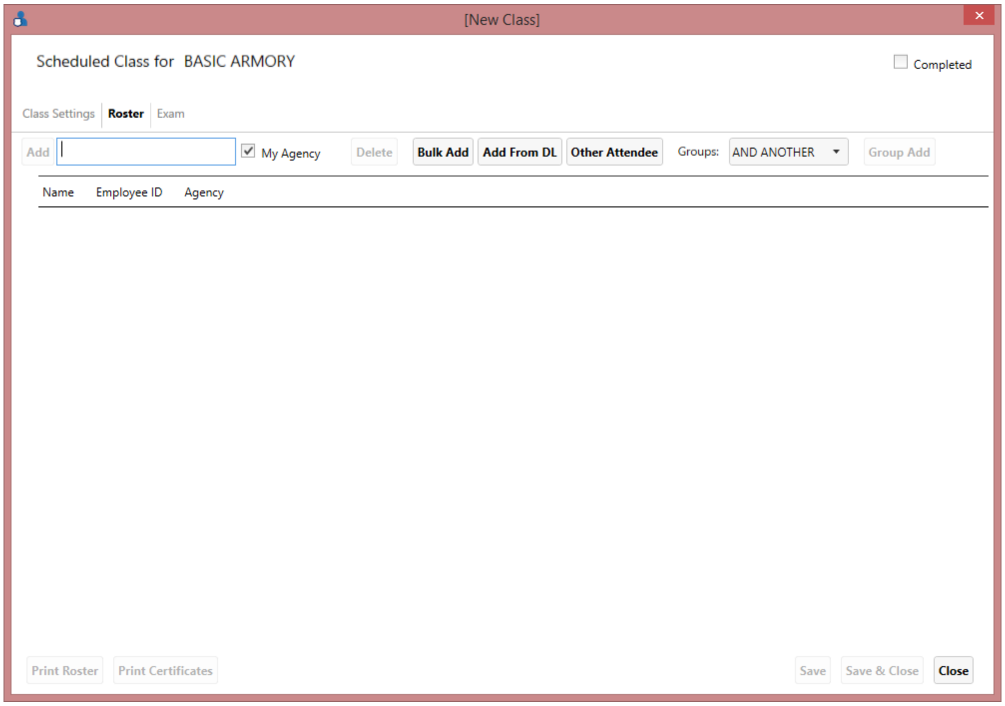
   ✓ Click **View** to open the highlighted attachment.

   ✓ 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)



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.

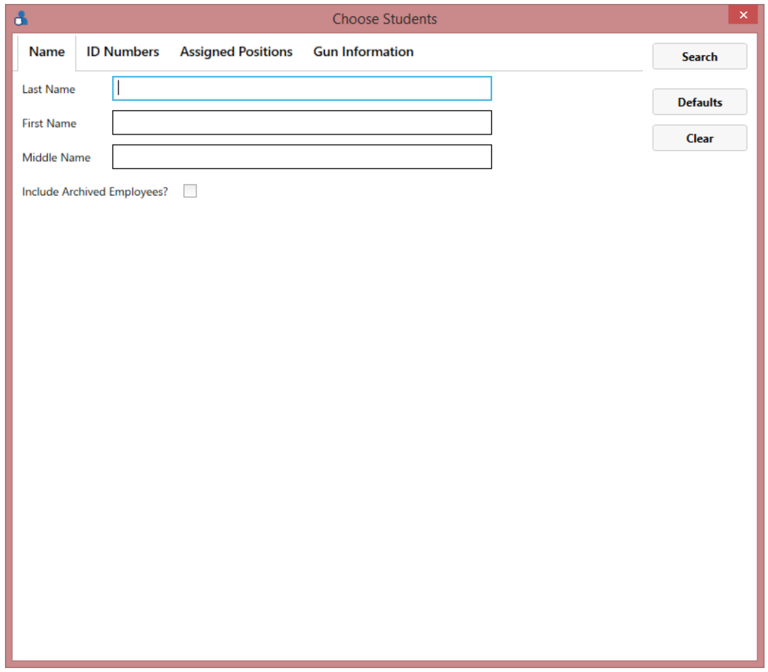
Click **Save** or **Save & Close**, when finished.

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.



   Search options are identical to that of the *Users* tab 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.

TIPS

✓ 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.

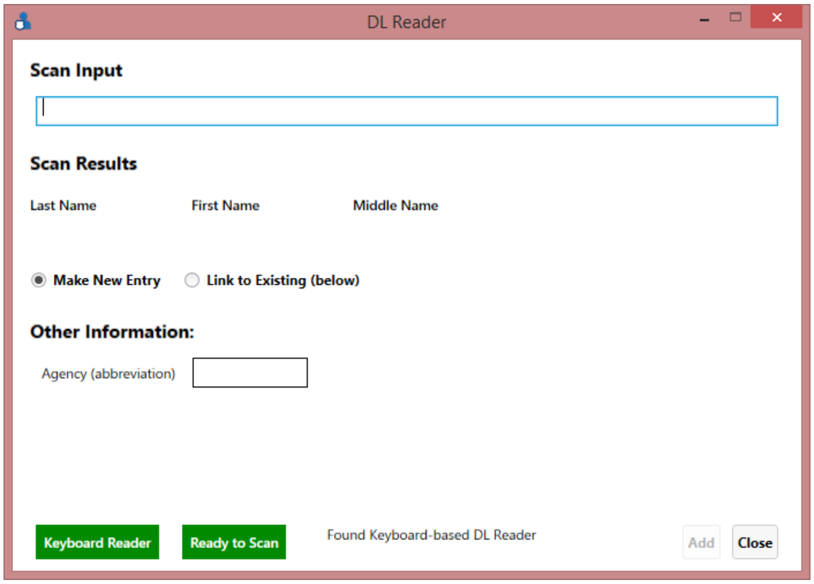
   - Find the last desired record and click on it. All intervening records will also be selected.

✓ 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.

   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.

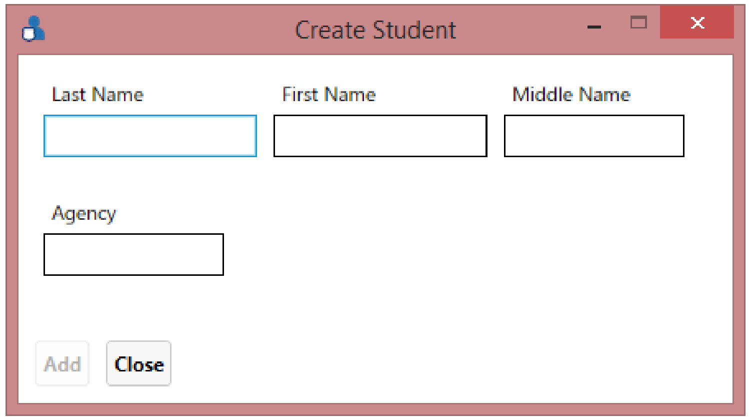
3. Using the radio buttons, choose whether to make a new entry or match the scanned license with an existing employee.

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.



2. Enter the student's **Last Name**, **First Name**, and **Middle Name**.
3. Enter the **Agency** from which the student comes.
4. Click **Add**.

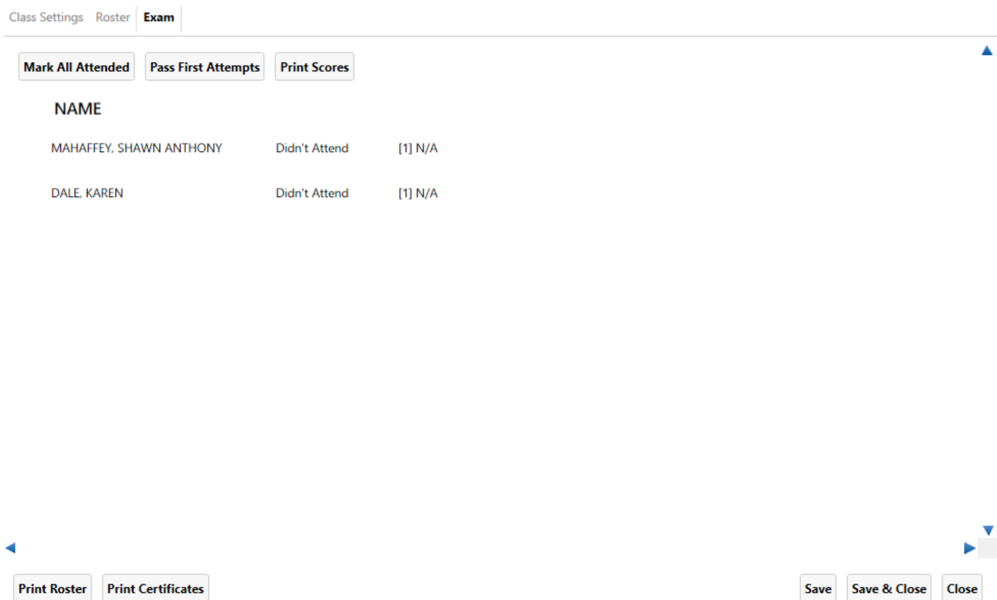
Adding Groups

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.

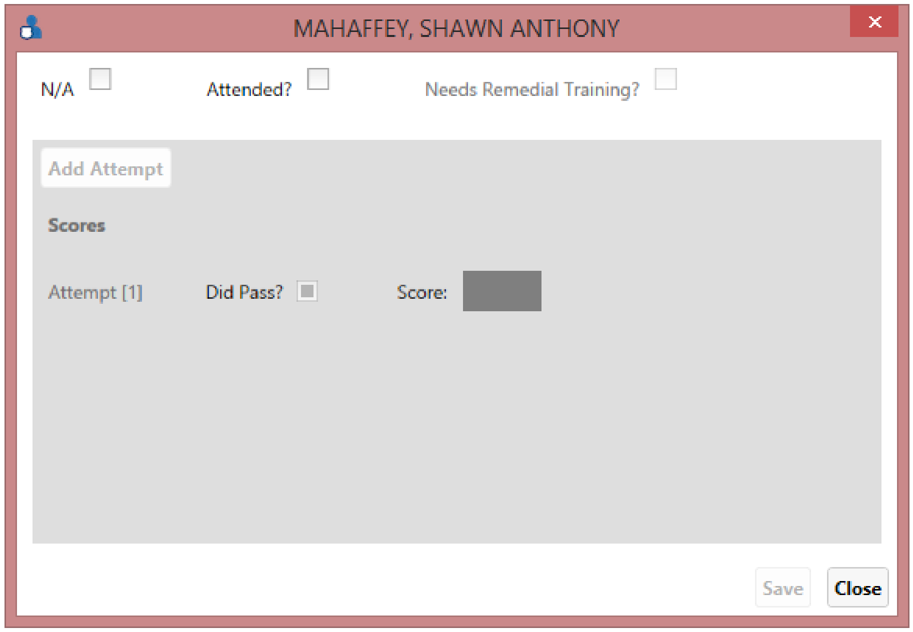


Attendance to a class is an overall yes/no criteria. If the class covers multiple days, daily attendance will need to be tracked externally. The buttons above the list of enrolled students may be used to perform repetitive actions.

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



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.

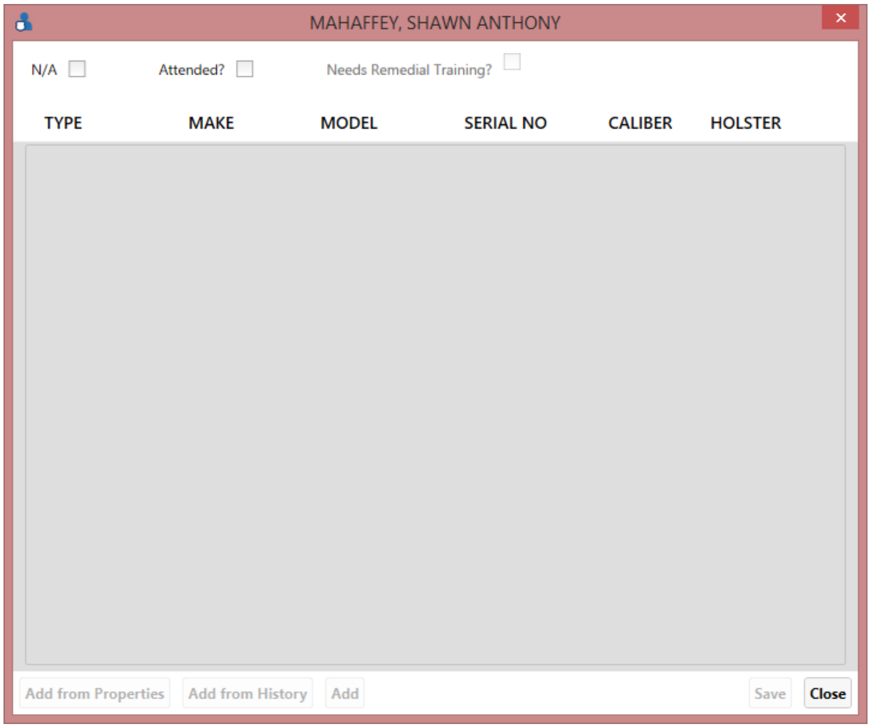
2. If the student attended the course and passed the exam on the first attempt, place a check beside **Did Pass?**.

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



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.

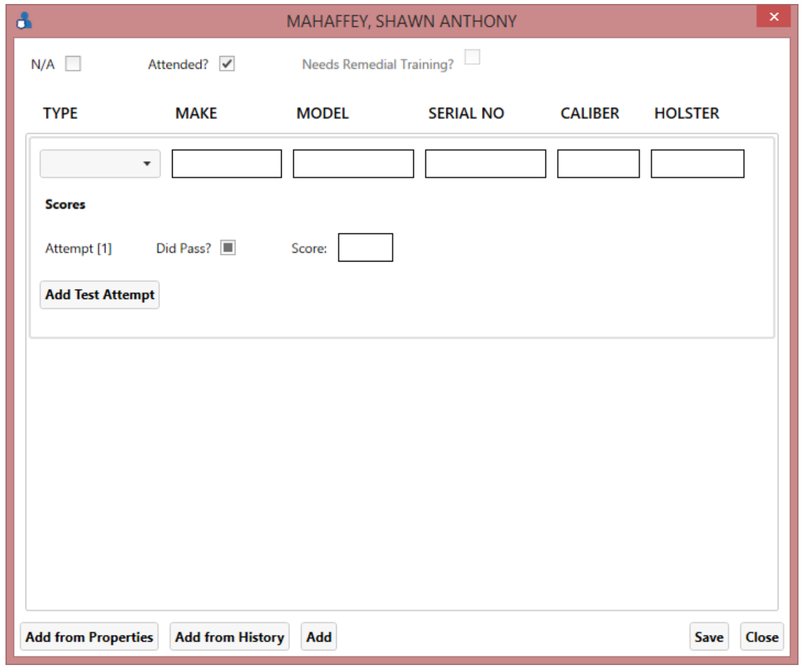
    - **Attended?**: Mark this to indicate the student's attendance to the class. Test scores may now be entered.

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.



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.

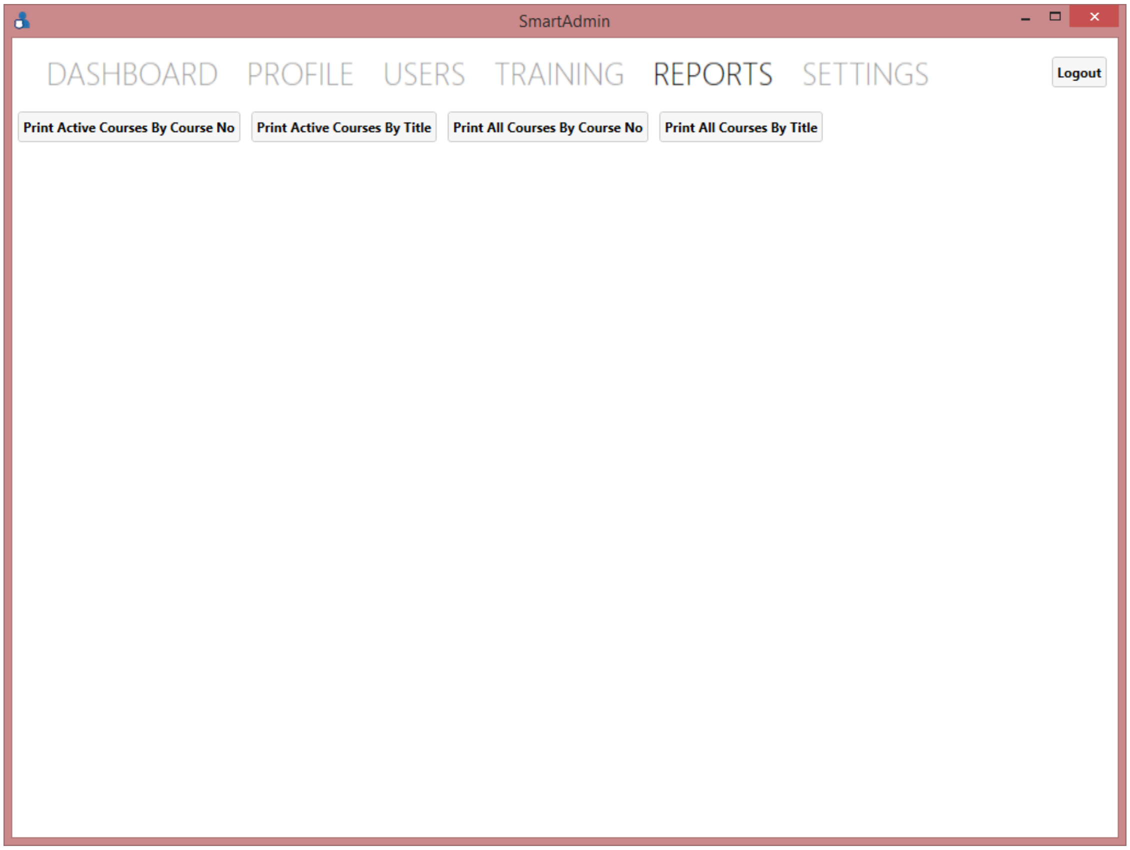
5. If the student attended the course and passed the exam on the first attempt, place a check beside **Did Pass?**.

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.

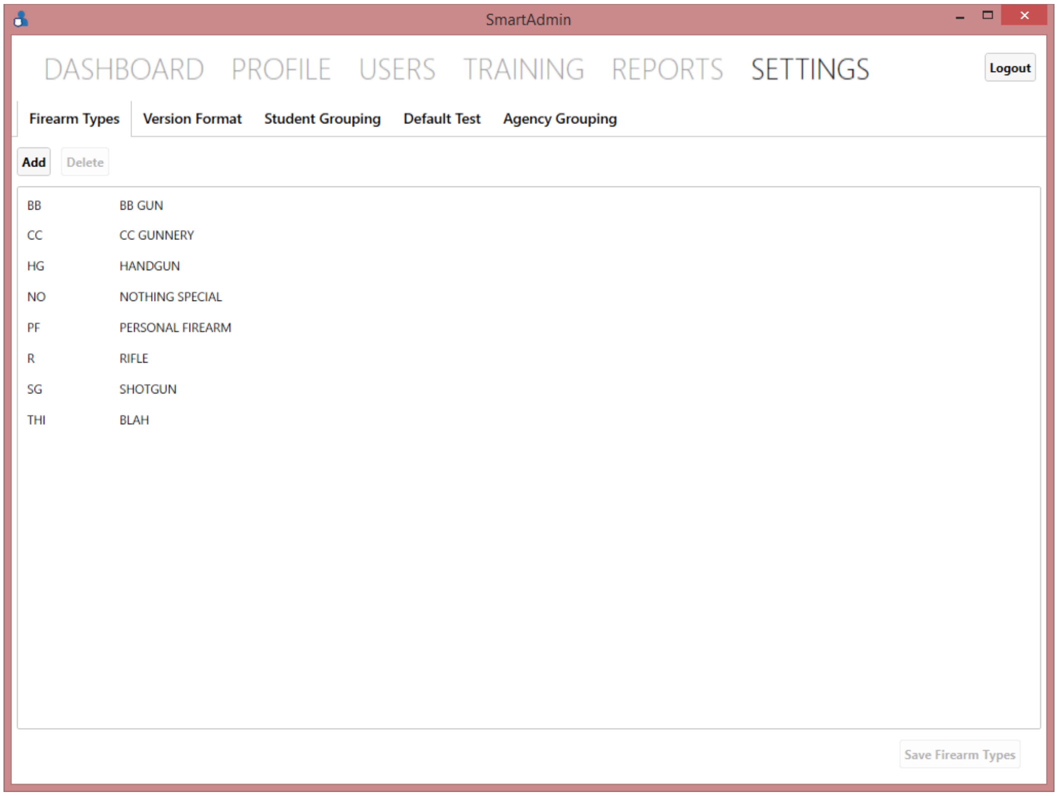
Reports



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.

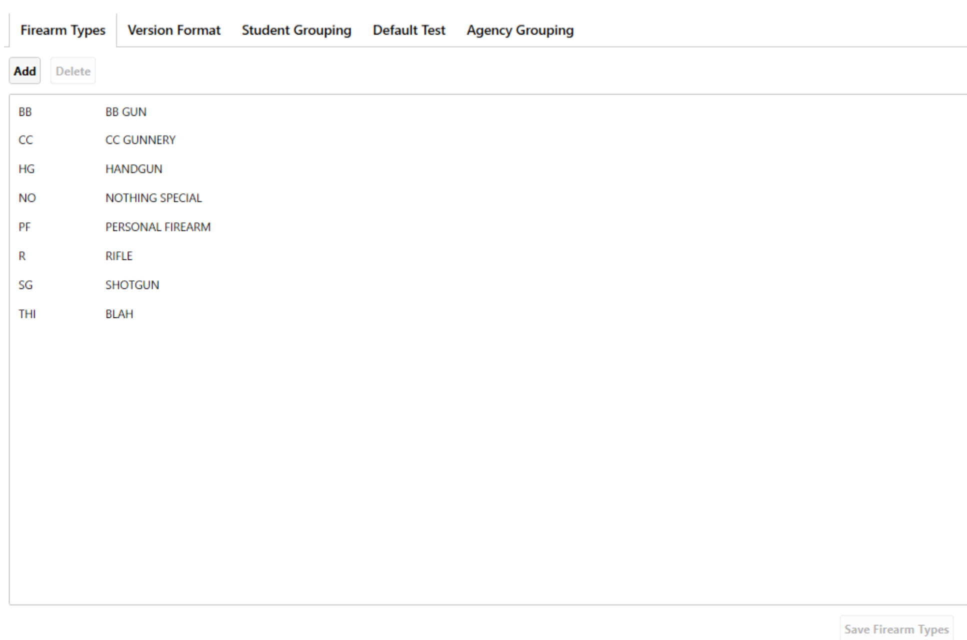
Print Active Courses By Course Number	Print a report showing only those courses that have not been marked complete. The report is ordered by Course Number.
Print Active Courses By Title	Print a report showing only those courses that have not been marked complete. The report is ordered by Course Title.
Print All Courses By Course Number	Print a report showing all recorded courses regardless of completion status. The report is ordered by Course Number.
Print All Courses By Title	Print a report showing all recorded courses regardless of completion status. The report is ordered by Course Title.

Settings



The *Settings* tab allows users to determine default program behavior and configure some drop-downs.

Firearm Types



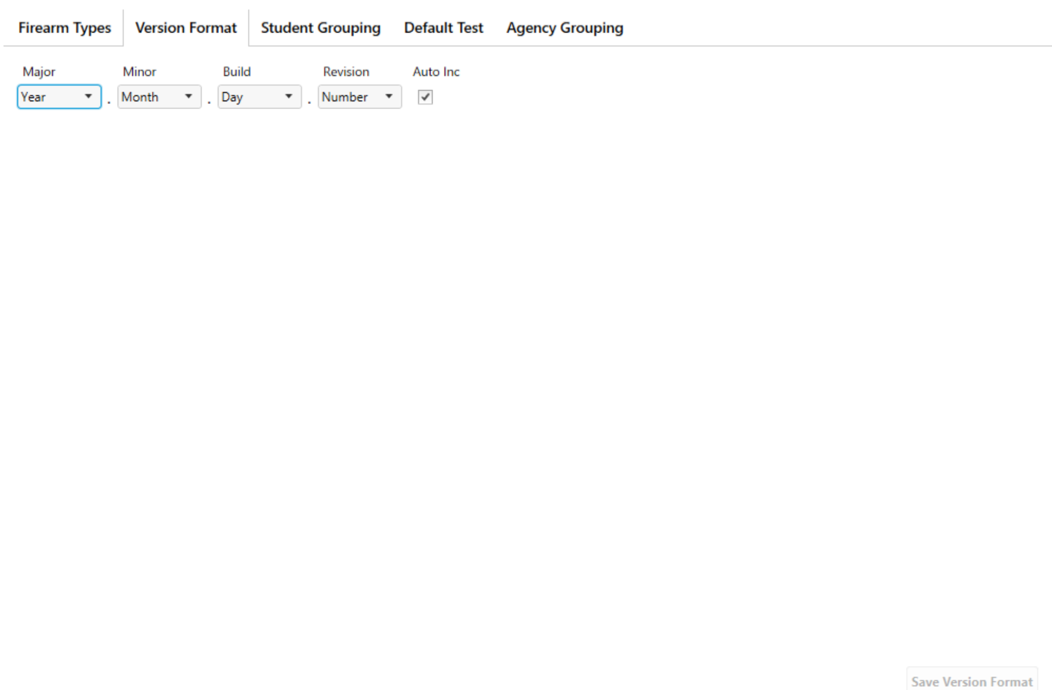
The *Firearm Types* tab allows users to configure types of firearms that may be used for examinations.

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.

TIPS

✓ To delete a firearm type, highlight it and click **Delete** at the top.

Version Format



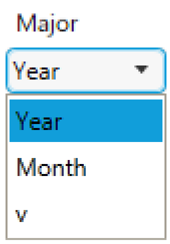
The *Version Format* tab is used to configure the automatic version numbering of lesson plans. Four main settings are available: *Major*, *Minor*, *Build*, and *Revision*.

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.

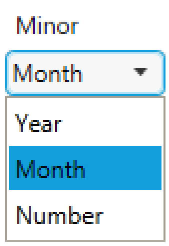
Version Value	Version Type	Version Information
2014	Major	The lesson plan was created in 2014.
09	Minor	The lesson plan was created in the 9th month (September).
14	Build	The lesson plan was created on the 14th day of the month.
0	Revision	This is the original lesson plan created on that day. Subsequent plans would have a revision of 1, 2, etc.

Major



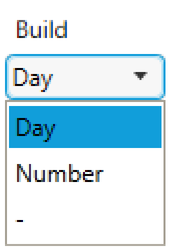
The *Major* version may be set to the current year, the current month, or the letter "v."

Minor



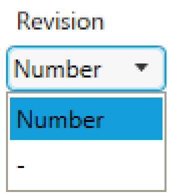
The *Minor* version may be set to the current year, the current month, or a number.

Build



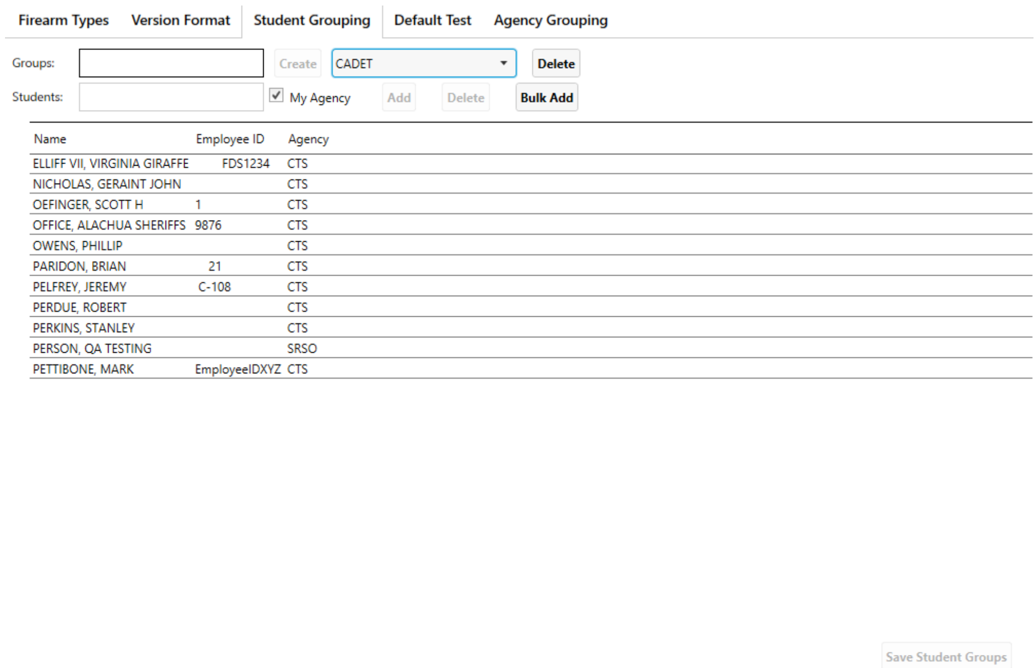
The *Build* may be set to the current day, a number, or a hyphen (-).

Revision



The *Revision* may be set to a number or a hyphen (-).

Student Grouping



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.

TIPS

✓ 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

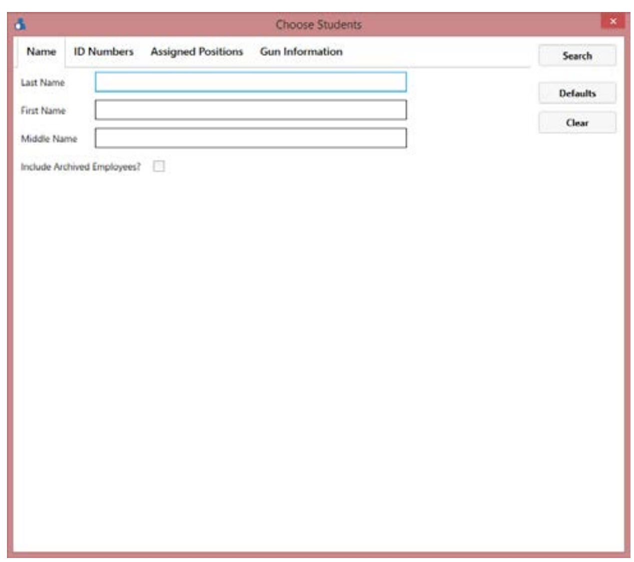
1. Begin entering the student's name in the first field on the *Students* line at the top.

   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.



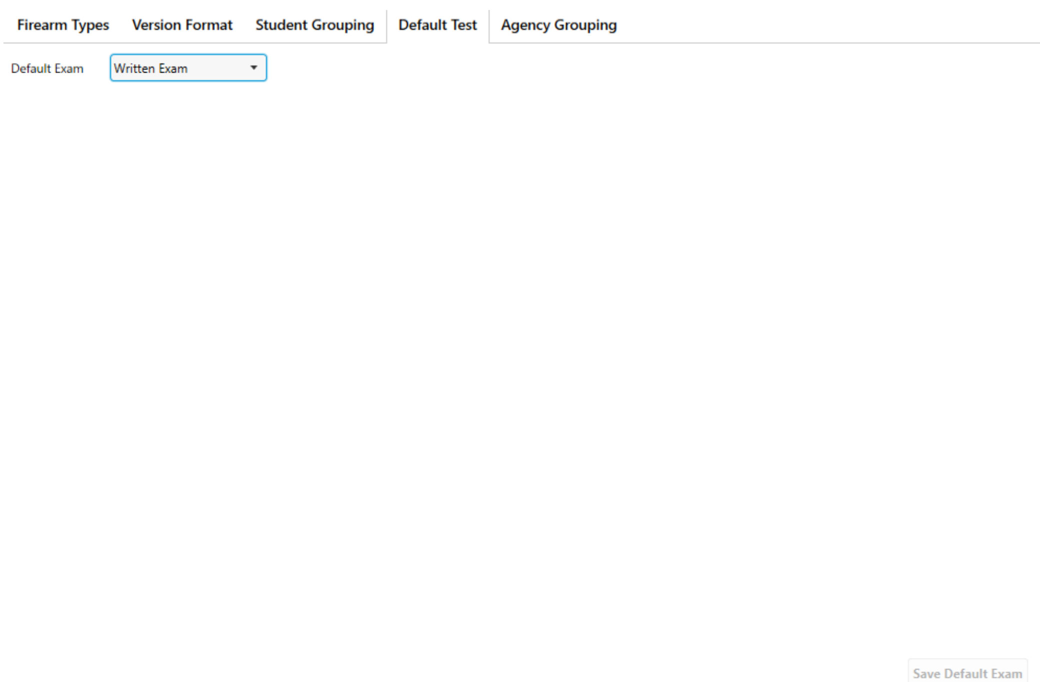
Search options are identical to that of the [Users tab] from the main application window.

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:
  - o Press the **[Down-Arrow]** until all desired records are selected.
  - o 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.

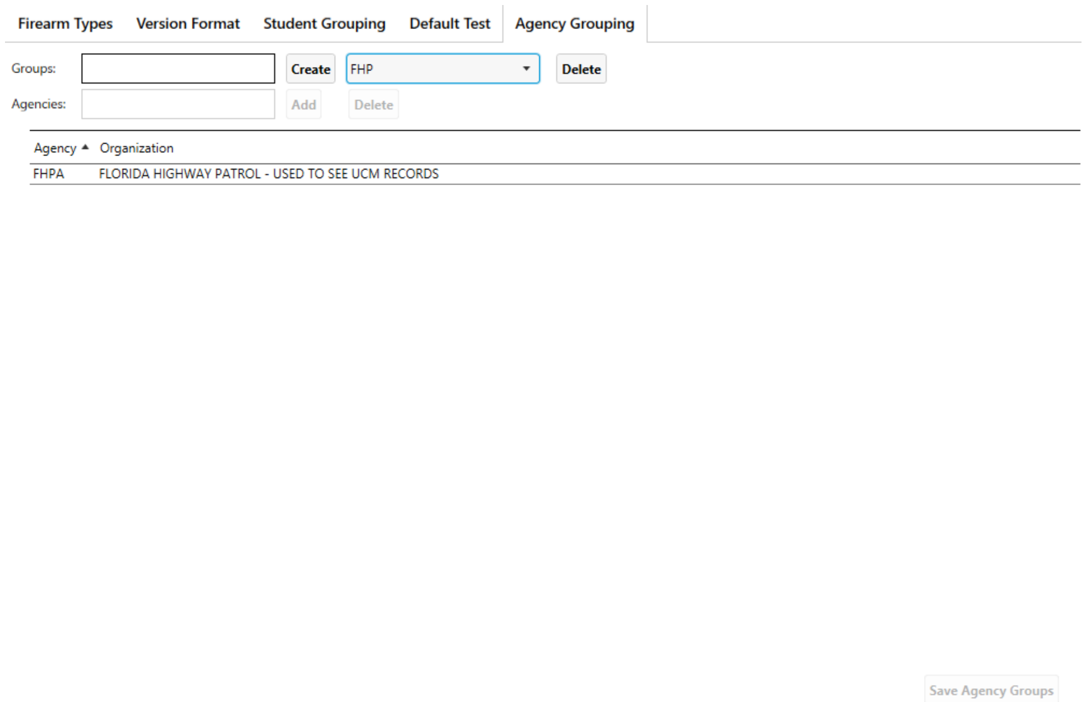
Important: These two methods of selection cannot be used at the same time. Use one OR the other.

Default Test



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



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.

TIPS

- ✓ 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**.

TIPS

- ✓ 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.