Stepping Stone Technologies Inc.

Casino Information Management System (CIMS)

How To Manual

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1. Events

For the routine, oft-repeated activities that take place during a gaming day, CIMS provides a simple, streamlined method of entering information into the database. An activity can be recorded by entering a minimum amount of information (Time, source of the call (Initiated By) and the call type (Nature of Event). Other fields (Action Taken, Camera/Monitor and Location) can be defaulted where the same information would be entered each time.

1.1 Add Routine events

Fields can be entered in any order.

1.1.1 Select the **Events** Tab (bottom left)

1.1.2 Click anywhere within the **Start Time** field – where a time that is other than current is to be entered, click on the down arrow and then select the applicable hour and minutes. An **End Time** can be subsequently entered.

1.1.3 Go to **Initiated By** and select a value from the drop down, (click on the down arrow to access the drop down list, or enter any value.) Entry of the first character(s) will return the applicable value.

1.1.4 Go to **Nature of Event** and select a value from the drop down. (click on the down arrow to access the drop down list or enter any value). When the cursor is moved from this field, the default values for the remaining fields will automatically be displayed.

1.1.5 Select **Save** – the event is created, and the entry form is cleared. To view a list of created Events, select the List tab.

1.2 Events for Dispatch

Where an Event is to be assigned to a security officer

1.2.1 Follow steps 1.1.1 to 1.1.3 – enter additional information where required

1.2.2 Go to **Location** – select a value from the drop down, this entry will appear in the dispatched call

1.2.3 Select **Create for Dispatch-** the Event will be saved in the **Event List** and also displayed in the **Dispatch Pending Calls** window.

1.3 Events with an Occurrence report

See Section 11 Occurrence Reports

1.4 Events with a Review

Recording Events where a review of media footage is requested

1.4.1 Follow steps 1.1.1 to 1.1.3

1.4.2 Select the **Review** tab

1.4.3 Enter the information regarding the Review in the appropriate fields

1.4.4 Select **Add**

1.4.5 Select **Save**

1.5 Events with a Copy

Recording Events where media has been dubbed to a master

1.5.1 Follow steps 1.1.1 to 1.1.3
1.5.2 Select the **Copy** tab
1.5.3 Enter the information regarding the Copy in the appropriate fields
1.5.4 Select **Add**
1.5.5 Select **Save**

1.6 Events with Pictures

Including images with an Event record

1.5.1 Follow steps 1.1.1 to 1.1.3
1.5.2 Select the **Pictures** tab – See 2.4 (Image Type Allocation)
1.5.3 Enter the information regarding the Picture in the appropriate fields
1.5.4 Select **Add**
1.5.5 Select **Save**

1.7 Link an Event to a Current Incident

An Event can be linked to either a Subject or an Employee Incident.

1.7.1 Display the applicable Subject or Employee Incident
1.7.2 Display the Event to be linked – (Highlight in the Event List and Select Edit)
1.7.3 In the Event Control Area
   1.7.3.1 Select the **Link To Incident** bar. (the radio button pertaining to the current incident – Subject or Employee – will be highlighted)
   1.7.3.2 Select the **Link to Incident** button (bottom of the window) – (both the Event and the Incident will be updated and saved)

1.8 Link an Event to a New Incident

An Event can be linked to either a Subject or an Employee Incident.

1.8.1 Display a Subject or an Employee, however do NOT select an Incident.
1.8.2 See 1.7.3 (Link to a Current Incident) **Note –** check that the **New** radio button is enabled.
1.8.3 Click on Link to Incident (a new Incident screen will be displayed) enter the new incident information.
1.8.4 Select **Save** - Note the pale blue check mark to the right of the Date field

1.9 Link an Event to an Occurrence Report

1.9.1 Select and display an Occurrence
1.9.2 Select and display an Event
1.9.3 In the **Event Control** area select the **Link to Occurrence** bar – if an Occurrence has been selected and displayed, the **Link** bar will be highlighted
1.9.4 Select the **Link to Occurrence** button (both the Event and the Occurrence will be updated and saved)

1.11 Event Search and Display

1.11.1 Display a List by Date

1.11.1.1 Select the Events tab

1.11.1.2 Select the List tab

1.11.1.3 Select or enter the applicable date – a list of any events entered on the selected date will be displayed

1.11.2 Display from a Parameter Search

1.11.2.1 Select the Events tab

1.11.2.2 Enter search information in one or more fields

1.11.2.3 Select Search – a formatting screen will be displayed

1.11.2.4 Select the applicable function (Print, Preview, E-Mail, Export)

1.11.3 Event Report by Date

1.11.3.1 Select the Events tab

1.11.3.2 Select or Enter the applicable date

1.11.3.3 Select the Report icon (top row, large book)

1.11.3.4 Select Events - a formatting screen will be displayed

1.11.3.5 Select the fields to be printed, previewed, e-mailed or exported

1.11.3.6 Select the field by which the report is to be ordered

1.11.3.7 Select the applicable function (Print, Preview, E-Mail, Save as PDF, or Export)

2. Image Capture, Assign, Search

Facial images as well as those of distinguishing features, vehicles, and suspicious activities can be captured and stored to form part of Event, Subject, Employee, and Incident records. Where Facial Recognition is utilized, a face quality threshold can be set and an automatic encoding functionality can be used so as to ensure high quality images are being captured

2.1 Live Image Capture – No Facial Recognition (encoding)

Where the desire is to capture images without immediate concern about facial recognition (encoding)

2.1.1 Click on the **Media** button from the top rows of buttons

2.1.2 Select either **Subject** or **Employee** from the **Type** list

2.1.2 Direct an applicable camera at the intended person, vehicle, feature, etc

2.1.3 Select the **Picture** button (under the Image Capture window), each click takes one picture

2.1.4 Repeat as desired – captured images appear in the **Unassigned Media** area

2.2 Live Image Capture – Automatic Encoding

Capturing and assigning multiple good quality images taken from a variety of angles will result a higher rate of positive facial recognition returns.

2.2.1 Click on the **Media** button from the top rows of buttons

2.2.2 Select Subject from the **Type** list.

2.2.3 Direct the applicable camera at the intended subject

2.2.4 Select the **Continuous** Encoding button from middle row of buttons – the success rate (number of images captured and the face quality of each) is displayed in the lower left hand corner of the screen. Images that meet or exceed the image quality threshold will be captured, automatically encoded and displayed in the **Unassigned Media** area

2.2.4 To stop continuous encoding re-select the **Continuous** Encoding button

2.3 Image Capture (Load Picture) from File

Files on the hard drive can be browsed for previously stored images.

2.3.1 Click on the **Media** button from the top rows of buttons
2.3.2 Select either **Subject** or **Employee** from the **Type** list
2.3.3 Select the **Load Picture** button (under the Image capture window)
2.3.4 Browse the hard drive and select the desired JPEG image
2.3.5 Select **Open** (or double click on the file) – the image will appear in the Unassigned Media area and in the Selected Picture or Video window
2.3.5 Repeat as desired

2.4 Image Type Allocation

Images can be allocated to any of the screens in the **Type** list –Subject, Involved, Features, Vehicles, etc.

2.4.1 Capture an image
2.4.2 Click on the image(s) from the **Unassigned Media Area** thumbnails.
2.4.3 Select **Type**
2.4.4 Select the applicable value from the list – right click to change from Subject to Employee
2.5.5 Select **Current or New Subject** or **Current** or **New Employee**– some types require a Subject or Incident record to be displayed
2.5.7 Repeat as required

2.5 Image Encoding - Manual Encode for Facial Recognition

Where an image has been loaded from a file or otherwise captured without being encoded, and Facial Recognition functionality is employed, capturing, coding and assigning multiple good quality images taken from a variety of angles will result in a higher rate of positive facial recognition returns

2.5.1 Click on the **Media** button from the top rows of buttons
2.5.2 Click on an image from the Unassigned Media area (the image will appear in the Selected Picture or Video window) Either right click on the image and select **Encode** from the list OR
2.5.3 Select the **Encode** button (under the right hand image window) the image will appear in the encoding window with a face quality value underneath, and a rectangle surrounding the eye area. (If the image shows as Rejected, close the window and select a different image for encoding.)
2.5.4 Select **Close** – the face quality score will appear in the lower left corner of the image
2.5.5 Repeat

2.6 Image Search – No Additional Criteria

2.6.1 Select an image from the unassigned media area (the selected image will show a blue border)

2.6.2 Click on the **Encode** button (If the image shows as **Rejected**, close the window and select a different image for encoding.)

2.6.3. Set the **Threshold** slider to 50% - this is an optional setting, varying levels can be used

2.6.4 Click on the **Search** button – an array of images meeting or exceeding the **Threshold** set will be returned in order of matching confidence – high to low

2.6.5 Place the cursor over an image to display the name and status of the person, and date the image was taken.

2.6.6 Click on **OK or** double click on an image to display the selected Subject record,

2.7 Image Search – with Text Parameters

2.7.1 Right Click on an image in Unassigned Media

2.7.2 Select **Search** from the list - the image will appear in the Subject screen (if the image is rejected, it will appear in the Facial Recognition window and in the Subject screen image window, close the window and select a different image for encoding.)

2.7.3 Enter search criteria in the Subject and/or Incident screens – any combination is allowable

2.7.4 Set the Threshold slider to 50% - this is an optional setting

2.7.5 In the Control area, Select **Search Subjects** – a gallery of possible matching faces will be displayed

2.7.6 Select the appropriate face and click **OK** to display the Subject's record

3. Subjects

In the event it is not possible or practical to include an image with a new Subject record, the applicable fields in the Subject mask can be entered first, and the images can be added afterwards. – a photo is NOT required in order to create a new Subject record

3.1 Add a New Subject – No Photo

3.1.1 Select the **Subjects** tab

3.1.2 Click on **New Subject –**Control Area (top left)

3.1.3 Enter the available information into the appropriate fields

3.1.4 Click **Save**

***Note –** The remaining fields in the Subject Details screen, as well as those contained in the other Subject screens (accessed by selecting the tabs at the bottom) - Addresses, Aliases, Features, Identification, LCT Totals and Watch List, are optional, and may be completed at any time.*

3.2 Add a New Subject - Include Facial Image

3.2.1 Select the **Subjects** tab

3.2.2 Click on the **Media** button – (where Images have already been captured, skip #'s 3.2.3. and 3.2.4.)

3.2.3 Select **Subject** from the **Type** drop down list

3.2.4 Capture an Image – (See 2.1, or 2.2, or 2.3. Capturing an Image)

3.2.5 Encode the image where desired (see 2.4.-Encoding a Facial Image)

3.2.6 Click on an image(s) from the **Unassigned Media** thumbnail area (to select multiple thumbnails use the **Shift** or **CTRL** keys)– the selected images in the unassigned area will then be highlighted with a blue border, and the last image selected will also appear in the Selected Picture or Video window.

3.2.7 Click on the New Subject button – the Subject screen will automatically display

- The Subject icon and Subject Name (Unknown, Unknown) will appear at the top of the Tree area (left side of screen)
- The image will display at the top of the Tree as well as in the assigned thumbnail area.
- The Subject form will be displayed with the first and last names defaulted to "Unknown". .

3.3 Assign Additional Subject Pictures

3.3.1 Click on the **Media** button

3.3.2 Click on another image(s) from the **Unassigned Media** area (or Capture additional images and select - See 2.1, or 2.2, or 2.3. Image Capture)

3.3.3 Click on **Current Subject** to add the images to the Subject record- Repeat as desired (assigning multiple good quality images taken from a variety of angles will result a higher rate of positive facial recognition returns.)

3.4 Assign Features Image(s) to a Subject

Pictures and descriptions related to distinguishing characteristics (marks, scars, tattoos, jewelry, etc.) can be added to a Subject record.

3.4.1 Click on the **Media** button

3.4.2 Select an image from the **Unassigned Media Area –** multiple images may be selected using Shift or Ctrl - (or capture additional images and select one - See 2.1, or 2.2, or 2.3. Image Capture)

3.4.3 From the **Type** list select **Features**

3.4.4 Click on the **Current Subject** button

3.4.5 Repeat as desired (these images can be captured at any time but can only be assigned after the Subject record has been created. Textual descriptions can be added for each picture using the Subject's Features tab.)

3.5 Subject Search

3.5.1 Select **Subjects** (icon lower left, or button from the top row)

3.5.2 Click the **Clear** button located in the control area (left side area) – this ensures that all of the fields in all of the Subject/Incident screens will be cleared of any previously entered information

3.5.3 Enter search criteria in the appropriate fields in either or both the Subject and Incident screens (a right click in the applicable field will display special search parameters i.e. **greater/less than**, **starts/ends with**, **between,** and **contains**) Values may be entered into any combination of fields in the Subjects and/or Incidents screens.

3.5.4 Return a **list of Subjects**

- 3.5.4.1 Click the Search button to return a list of Subjects (or No Records Found)
- 3.5.4.2 To display a single record, double click on the record, (Select **Load When Selected**, else the list of records is replaced with the display of the selected record)
- 3.5.4.3 Repeat as desired

3.5.5 Return an **Array of Subject images** from the **Subject** Data base

- 3.5.5.1 Click the Down Arrow on the Search button
- 3.5.5.2 Click on Subject Pictures (An array of images from the Subject data base matching the criteria entered will be displayed)
- 3.5.5.3 Place the cursor over an image to display the name, status and date of the image
- 3.5.5.4 Double click on an image to display the associated Subject/Incident records

3.5.6 Return an **Array of Subject images** from the **Subject** and **Shared** data bases

- 3.5.6.1 Click the Down Arrow on the Search button
- 3.5.6.2 Click on Subject and Shared Pictures (An array of images from the Subject and Shared data bases matching the criteria entered will be displayed) (records that are resident in the Shared data base will be displayed last, and will have Shared appear at the bottom of the image.)
- 3.5.6.3 Place the cursor over an image to display the name, status and date of the image
- 3.5.6.4 Double click on an image to display the associated Subject/Incident or Shared records

3.6 Combine Subject Records

Where the same Subject has multiple Subject records

3.6.1 See 3.5 Subject Search

3.6.2 Select a base record (typically the base record will be the one with the most complete information)

3.6.3 Select the **Combine Subjects** icon

3.6.4 Enter the search criteria to return the other duplicate records

3.6.5 Select **Search**

3.6.6 Select the record(s) to be combined from the list

3.6.7 Select **Combine with Current –** all images from the duplicate records will be transferred to the base record. Only where a data field in the base record is blank, will the value from the data field in the duplicate record be transferred.

4. Subject Incidents

Multiple Incidents can be added to a Subject over time. Incident information is entered into the various data fields which are accessible through the Tabs found at the bottom of the Incident screen. The Short Description and Date for each Incident is displayed in the Control area left side under the Subject's name. A Subject record must be displayed in order for a new Incident to be added.

4.1 Add a New Incident to a Subject Record

4.1.1 Search for and display an existing Subject, or create a new Subject (See 3.1 or 3.2 - Add a New Subject Record.)

4.1.2 Go to the control area (left hand side of the screen)

- 4.1.2.1 Select New Incident – the Incident Details screen is displayed with the current date and System Generated Incident # set as defaults.
- 4.1.2.2 Enter information in the applicable fields-where drop down lists are available, either select from the list or enter a character string. Any value may be entered whether or not it appears in the list.
- 4.1.2.3 Select from the tabs at the bottom of the Details screen and enter the applicable information. Note- some screens require the selection of the ADD button prior to a Save
- 4.1.2.4 Select Save

Note *– The remaining fields in the Incident Details screen, as well as those contained in the other Incident screens (accessed by selecting the tabs at the bottom) – Cash Transactions, LCT, Vehicles, Involved, Banned, Dispute, Services and Linked - are optional, and may be completed at any time.*

4.2 Add Images to Vehicle, Involved and Dispute

The images can be captured at any time, but can only be assigned after the Incident has been added

4.2.1 Search for and display an existing Subject (See 3.5. Subject Search) or create a new Subject (See 3.1 or 3.2. Add a New Subject)

4.2.3 Select an existing Incident, or create a new Incident (See 4.1. Add a **New Incident)**

4.2.5 Click on the **Media** button

4.2.6 Select an image from the Unassigned Media area (or capture additional images and select - See 2.1, or 2.2, or 2.3. Image Capture, multiple images may be selected using Shift or Ctrl) the selected image will show blue borders, and will appear in the Selected Picture or Video window

4.2.7 From the **Type** drop down list, Select the applicable value (Vehicle, Involved or Dispute)

- 4.2.7.1 Click on **Current Subject**
- 4.2.7.2 Repeat as desired – these images can be captured at any time but can only be assigned after the Incident record has been saved. Textual descriptions can be added for each picture using the applicable Tab.

4.2.8 Click **Add** in the **Vehicle, Involved** or **Dispute** screen

4.2.9 Click on **Save** in the **Control** area – the applicable type of entry will be displayed associated to the Incident.

5. Employees

In the event it is not possible or practical to immediately include an image with a new Employee record, the applicable fields in the Employee mask can be entered first, and the images can be added afterwards

5.1 Add a New Employee – No Photo

5.1.1 Select the Employee tab
5.1.2 Click on **New Employee –**Control Area (top left)
5.1.3 Enter the available information into the appropriate fields
5.1.4 Click **Save**

Note – *The remaining fields in the Employee Details screen, as well as those contained in the other screens accessed by selecting the tabs at the bottom, (Address, License, Personal, Linked) are optional, and may be completed at any time.*

5.2 Add a New Employee - Include Facial Image

5.2.1 Select the **Employee** tab
5.2.2 Click on the **Media** button
5.2.3 Select **Employee** from the **Type** drop down list
5.2.4 Capture an Image – (See 2.1, or 2.2, or 2.3. Capturing an Image)
5.2.5 Click on an image(s) from the **Unassigned Media** thumbnail area (the selected image in the unassigned area will then be highlighted with a red border, and will also appear in the Selected Picture or Video window.)(multiple images may be selected using the Shift or Ctrl keys.)
5.2.6 Click on **New Employee** - A new Employee record will automatically be created

- The Employee icon and Employee Name (Unknown, Unknown) will appear at the top of the Tree area (left side of screen)
- The picture will display at the top of the Tree as well as in the assigned thumbnail area.
- The Employee form will be displayed with the first and last names defaulted to "Unknown".

5.3 Assign Additional Employee Pictures

5.3.1 Click on the **Media** button
5.3.2 Select other images of the Employee from the Unassigned Media area (or Capture additional images and select - See 2.1, or 2.2, or 2.3. Image Capture)
5.3.3 Select **Current Employee**
5.3.4 Repeat as desired

Note – *The remaining fields in the Employee Details screen, as well as those contained in the other Employee screens (accessed by selecting the tabs at the bottom), are optional, and may be completed at any time.*

5.4 Employee Search

5.4.1 Select the **Employee** tab – located on the left side of the screen at the bottom of the control area

5.4.2 Click the **Clear** button located in the control area (left side area) – this ensures that all of the fields in all of the Employee /Incident screens will be cleared of any previously entered information

5.4.3 Enter search criteria in the appropriate fields in both the Employee and Incident screens – Special search parameters i.e. **greater/less than, starts/ends with, between, and contains** are accessible by a right click in the applicable field. Values may be entered into any combination of fields in the Employee and/or Incidents screens.

5.4.4 Click the **Search** button - The system will return either a list of Employees that match the entered search criteria, or the message No Matches Were Found. See 3.5 Subject Search re Browse List

5.4.5 Click on the **down arrow** on the **Search** button.

5.4.6 Select **Employee Pictures** (An array of images from the **Employee** data base matching the criteria entered will be displayed)

6. Employee Incidents

6.1 Add a New Incident to an Employee Record

Multiple Incidents can be added to an Employee record.

Incidents are displayed in a tree under the Employee's name and can be ordered by date, or grouped by Incident Short Description. An Employee record must be displayed in order for a new Incident to be added

6.1.1 Search for and display an existing Employee, or create a new Employee

6.1.2 Go to the control area (left hand side of the screen)

6.1.3 Select **New Incident** – the Details screen is displayed with the current date set as a default

6.1.4 Enter information in the applicable fields-where drop down lists are available, either select from the list or enter a character string.

Note – *The remaining fields in the Employee Incident screen, as well as those contained in the other Incident screens (accessed by selecting the tabs at the bottom) are optional and may be completed at any time.*

6.1.5 Select from the tabs at the bottom of the Details screen and enter the applicable information. Note- some screens require the selection of the ADD button prior to a Save

6.1.6 Click **Save** – the record is updated

6.2 Add Images to Involved, Audit, Variance, Internal Report

The images can be captured at any time, but can only be assigned after the Incident has been added

6.2.1 Search for and display an existing Employee or

6.2.2 Create a new Employee (See 5.1 or 5.2. Add a New Employee)
6.2.3 Select an existing Incident, or
6.2.4 Create a new Incident (See 4.1. Add a New Incident)
6.2.5 Click on the **Media** button
6.2.6 Select an image from the **Unassigned Media** area or Capture new images
6.2.7 Select the applicable value(**Involved, Audit, Variance, or Internal Report**) from the Type drop down
6.2.7 Click on **Current Employee**.
6.2.8 Click **Save**
(Repeat as desired – these images can be captured at any time but can only be assigned after the Incident record has been saved. Textual descriptions can be added for each picture using the applicable Tab)

*(**Note**- some screens require the selection of the ADD button prior to a Save)*

7. Call Taking (For Dispatch)

7.1 Complaint Taker/Dispatcher (Closed by Complaint Taker)

Where the Complaint taker is also the Dispatcher and events for dispatch are Closed at the time they are Created For Dispatch.

7.1.1 See 1.1.1 to 1.1.4 - (Add Routine Event)
7.1.2 Complete the Location field (optional, but desirable)
7.1.3 Click on the **Dispatch** bar
7.1.4 Enter Area and/or Priority if used
7.1.5 Select a Unit Code from the Units drop down list
7.1.6 Check the **Close** checkbox (to view/edit closed calls Click on the **Dispatch** icon and select **Edit Closed Calls**

7.2 Complaint Taker/Dispatcher (Dispatched by Complaint Taker)

Where the Complaint taker is also the Dispatcher and events created for dispatch appear in the Dispatch screen in the Active Calls area

7.2.1 See 1.1.1 to 1.1.4 - (Add Routine Event)
7.2.2 Complete the Location field (optional)
7.2.3 Select the Dispatch bar
7.2.4 Enter Area and/or Priority if used
7.2.5 Select a Unit Code from the Units drop down list
7.2.6 Select **Create for Dispatch –** the call will appear in the Dispatch screen in the Active Calls area

7.3 Complaint Taker

Where Events Created for Dispatch appear in the Pending Calls list

7.3.1 See 1.1.1 to 1.1.4 - (Add Routine Event)
7.3.2 Complete the Location field (optional)
7.3.3 Select the Dispatch bar
7.3.4 Enter Area and/or Priority if used

7.3.5 Hold the Event for a specific Unit or a Time (optional)
7.3.6 Select **Create for Dispatch –** the call will appear in the Dispatch screen in the Pending Calls list.

8. Dispatch

8.1 Assign a Unit

8.1.1 Select the Dispatch tab
8.1.2 Select a Call from the Pending Calls list
8.1.3 Select a Unit Code in the Available Units list,
8.1.4 Right Click on the selection in 8.1.3 above - (8.1.2. and 8.1.3. can be done in reverse order)
8.1.5 Select **Assign** from the context menu

8.2 Create a Unit Initiated Call

8.2.1 Right click on a Unit Code in the Available Units list
8.2.2 Select Unit Initiated Call from the context menu – the unit will appear assigned in the Active Calls area

8.3 Assigning Additional Units to a Call

8.3.1 Drag and Drop Unit Code
8.3.1.1 Select a Unit Code from the Available Units list
8.3.1.2 Drag and drop into the applicable active call
8.3.2 Context menu Selection
8.3.2.1 Select a call in the Active Calls area - the banner of the selected call will change to blue
8.3.2.2 Right Click on a Unit Code in the Available Units list (multiple codes can be selected before the right click)
8.3.2.3 Select **Add to Call** from the menu

8.4 Add Information to a Dispatched Call

8.4.1 By Unit Code
8.4.1.1 Select the Unit Code from the **Locate Call by Active Units** list - the banner of the call the unit is assigned to will change to blue
8.4.1.2 Enter text information into the Additional Information field
8.4.1.3 Select **Add Information –**the information, preceded by a time segment and the Unit Code, will appear in the call currently assigned to the selected unit
8.4.2 By Dispatcher
8.4.2.1 Select the applicable call in the Active Calls list - the banner of the selected call will change to blue
8.4.2.2 Enter the text information in the Additional Information field
8.4.2.3 Select **Add Information –** the information, preceded by a time segment and the Dispatcher id, will appear in the selected active call

8.5 Remove a Unit from an Active Call

8.5.1 Drag and Drop

8.5.1.1 Select the applicable Unit Code in an active call

8.5.1.2 Drag the Unit from the active call to either the Available Units list or another active call - where this was the last unit assigned on the call, a choice window will appear asking if the call should be closed.

8.5.2 Clear in Active Call

8.5.2.1 Select the applicable Unit Code in an active call

8.5.2.2 Right click on the Unit Code

8.5.2.3 Select **Clear** from the context menu – the unit id will now display in the Available Units list, - where this was the last unit assigned on the call, a choice window will appear asking if the call should be closed

8.5.3 Locate Call by Active Unit and Clear

8.5.3.1 Enter the applicable Unit Code in the Locate Call by Active Unit field (or select from the list)

8.5.3.2 Select **Clear** - the Unit Code will now display in the Available Units list - where this was the last unit assigned on the call, a choice window will appear asking if the call should be closed

8.6 Primary Unit Designation

8.6.1 Default Designation – the first unit assigned to a call is, by default, the Primary Unit

8.6.2 Designate a Primary Unit

8.6.2.1 Select a Unit Code in the applicable call

8.6.2.2 Right click on the Unit Code

8.6.2.3 Select **Make Primary** from the context menu

8.7 Occurrence Report Assignment

8.7.1 Assign to the Primary Unit – the call must be Active; there must be a Unit assigned; the unit must have an officer name associated

8.7.1.1 Select the applicable call – either click within the call or select a unit code from the Locate Call by Active Unit list – the banner of the selected call will change to blue

8.7.1.2 Identify the Primary Unit – See 8.6 Primary Unit Designation

8.7.1.3 Go to Report for Selected Call (upper left screen area) and Select the Primary Unit radio button

8.7.1.4 Select **Report Required** – the message (1) Report Requested will be displayed

8.7.2 Assign Reporting Requirements to All Units - the call must be Active; the Units assigned must have officers names associated

8.7.2.1 Select the applicable call – either click within the call or select a unit code from the Locate Call by Active Unit list – the banner of the selected call will change to blue

8.7.2.2 Go to Report for Selected Call (upper left screen area) and Select the All Units radio button

8.7.2.3 Select Report Required – the message (#) Reports Requested will be displayed - (#) is the number of Unit Codes assigned to the call that have an officer name associated

8.8 Closing Calls

8.8.1 By Unit Code

8.8.1.1 Select, (or enter) the applicable active Unit Code in the Locate Call by Active Unit list – the banner of the associated active call will change to blue

8.8.1.2 Select the **Close** button – where a Unit(s) is still assigned to the call, a choice window will appear asking if the Unit(s) should be cleared and the call should be closed.

8.8.2 By Active Call

8.8.2.1 Click anywhere within the applicable active call - the banner of the active call will change to blue

8.8.2.2 Select the **Close** button – where a Unit(s) is still assigned to the call, a choice window will appear asking if the Unit(s) should be cleared and the call should be closed

8.9 Changing a Unit's Status

8.9.1 Change from Available to Unavailable

8.9.1.1 Right click on a Unit Code from the Available units list

8.9.1.2 Select **Change Status** from the context menu

8.9.1.3 Select a status – the unit will now appear in the Unavailable Units list

***Note** – if the new status selected is **Off Duty**, the unit will be removed from both lists*

8.9.2 Change from Unavailable to Available

8.9.2.1 Select the applicable unit code from the Unavailable units list

8.9.2.2 Drag the Unit to the Available Units list

9. Transaction Logs

9.1 Transaction Log

Provides an audit trail of all transactions in all modules

9.1.1 Select the **Transaction Log** icon

9.1.2 Adjust the Date fields as required

9.1.3 Select one or more Actions – Added, Updated, Deleted

9.1.4 Select a **Section** from the drop down list – blank returns all sections

9.1.5 Enter applicable text in Description if desired – (from Nature of Event Details, Subject/Employee Short Description, or Quick Event Type)

9.1.6 Select a **User Name** from the drop down list if desired

9.1.7 Select **Load** – Transactions matching the criteria entered are displayed

9.1.8 Select a transaction from the list

9.1.9 Select [**Load ….]** (bottom of the screen)

9.2 Incident List

Provides a list of Subject and Employee Incidents that were added for the Date(s) entered

9.2.1 Select the **Incident List** icon
9.2.2 Select either the **Subject** or the **Employee** radio button
9.2.3 Enter an applicable date range – defaults to the current date
9.2.4 Select **Load** – the list of Incidents entered for the date(s) entered will be displayed
9.2.5 Select an Incident from the list (double click) or
9.2.6 Select **[Load……]** from the bottom of the screen - the load button will include reflect the entered criteria.

10. Visitor Log

Replace paper-based records systems

10.1 Visitor Log Entry

10.1.1 Select the **Visitor Log** icon
10.1.2 Check Group of Visitors, where applicable
10.1.3 Enter the Group Identifier, where applicable
10.1.4 Enter the Time of Arrival – click in the Time field for the current time
10.1.5 Enter the Reason for the visit
10.1.6 Select **Add** – (select list to view the entry)

10.2 Visitor Log Update

10.2.1 Select the **Visitor Log** icon
10.2.2 Select the current date
10.2.3 select the applicable entry from the list
10.2.4 Select Edit – edit fields as desired
10.2.5 Select **Update**

10.3 Visitor Log Search

10.3.1 Select the **Visitor Log** icon
10.3.2 Enter applicable search criteria
10.3.3 Select **Search**
10.3.4 Select the applicable record from the list
10.3.5 Select **Edit** to view contents

11. Occurrence Report

When multiple reports are required in relation to a single Subject or Employee Incident, the Occurrence Report module should be utilized. This module can be used by Security and/or Surveillance officers. Typically, Supervisory staff would create an Occurrence Report and assign the officers who are to submit a report. The applicable officers can then retrieve the original entry and complete their report(s).

11.1 Create an Occurrence Report Entry (Supervisor)

11.1.1 Select the Occurrence Report icon – bottom left of screen
11.1.2 Click on the New Occurrence button – top of Control Area (note the System generated Occurrence number and the current date.)
11.1.3 Enter the **Short Description**, **Time** and **Location**
11.1.4 Click the **Required From** tab - bottom of the screen
11.1.5 Click the down arrow at the right end of the **Required From Role** field (top of screen)
11.1.6 Select the applicable Role from the list displayed – if officers from different roles are to be assigned, display each role separately and select the officers.
11.1.7 Select the applicable Officers names – a green check mark will appear in the box on the left of each officer selected.
11.1.8 Click on the **Add Selected** button - bottom of the screen (the selected Officers now appear in the area on the right side of the screen.) Note- to remove an name(s) from the Selected list, highlight the name(s) and click on the **Remove Selected** button.

11.2 Occurrence Report Writing – Assigned Officers

11.2.1 Select the **Occurrence Report** icon
11.2.2 Enter applicable search criteria into the fields (**Start Date**; **End Date**; **Required From**)– blank returns all
11.2.3 Select **Search** – a list of reports matching the search criteria is displayed showing the total number required for each Occurrence, the number completed, verified and the Occurrence date.
11.2.4 Double click to view the Occurrence
11.2.5 Select **Required From** to view. – all officers assigned will be displayed, however **Edit** capability is restricted to the each officer's own report.

11.3 Link an Occurrence to an Incident

11.3.1 Select and display an Occurrence and an Incident
11.3.2 In the Occurrence Report control area, select **Link to Incident** bar (if an Incident has been selected and displayed, the **Link to Incident** button will be highlighted
11.3.3 Select the **Link to Incident** button (both the Occurrence and the Incident will be updated and saved)

12. Access Card Inventory

12.1 Card Issue - Access Card icon (padlock)

12.1.1 Enter the cardholder's personal information - the Permitted Areas are user-definable
12.1.2 Select **Add**
12.1.3 Repeat as required
12.1.4 Select **Close** to exit

12.2 Card Inventory - Access Card icon (padlock)

12.2.1 Select the **Inventory List** tab - the list of Active cards is displayed by default
12.2.2 Select the **Terminated** radio button – the list of Terminated cards is displayed
12.2.3 Double click on a list item to display the original card issue information

13. Equipment Log

13.1 Entry of Equipment Requiring Repair

13.1.1 Select the **Equipment** icon (video tape) – the entry screen is displayed
13.1.1 Select the applicable **Type** radio button
13.1.2 Enter the equipment identifier (name, number, etc.)
13.1.3 Select a status from the drop down list (user-defined)
13.1.4 Select **Add**
13.1.5 Repeat as required

13.2 Update After Repair

13.2.1 Select the **Equipment** icon
13.2.2 Select the **Outstanding/Completed** tab – the outstanding list is displayed (to view the Completed list, select the Completed Radio button)
13.2.3 Select the applicable entry from the list
13.2.4 Select **Edit** (or double click on the list item) – the Entry screen is displayed
13.2.5 Check the **Completed** box – the current date is auto-filled and the remaining fields are enabled
13.2.6 Select an Action from the drop down list (user-defined)
13.2.7 Enter any other applicable information
13.2.8 Select **Update**
13.2.9 Repeat as required