



SAFE Quick Start Guide

Enough to get you started and pointed in the right direction...

Site URL

<https://secure.trackerproducts.com>
for most Users of our US based system.

Logging In

After you receive the SAFE welcome email, follow the instructions to get logged in. If you've forgotten your Password, click the words 'Forgot Password' and enter your email address. SAFE will send you an email on how to create a new one!

Support Documentation

Go to Help from the Navigation Menu and select 'Wiki Support Guide' for General User and Administrator help.

User Settings

Change basic info, add a picture of yourself to your user account, or setup Google MFA / change PW.

System Configuration

Go to Settings > Organization. Most of the tabs on this page control drop down values through the system.

The Org Settings Tab is for general site setup like Time Out Settings, setting up Signature Devices and Case/Matter Number formatting etc. If you wish to change these settings, Click the Edit button to Edit your selections. When you're finished, click Save.

For Item Categories, Custody and Checkout Reasons, Disposal Methods, Case/Matter Offense and Person Types, select the Available Options you'd like to use, and place them in Options in Use by highlighting them and clicking the single right arrow to move them. Click Save Changes to save your changes before switching Tabs.

System Configuration (continued)

The Announcements Tab allows you to place a color Banner on a User's Dashboard. Good for getting out information in a timely manner, or for use as a reminder to All Users such as to follow a certain Case/Matter Number format. Info banners are blue, success banners are green, and warning banners are yellow.

The Translation Tab allows you to change most text that is shown on the site. Only change text in second set of quotes or you may end up 'breaking' your site. When you're finished, click Save Changes.

The Required Fields Tab allows you to remove Item fields you don't want to use. If you don't want to capture Make, Model, or the Serial number of an Item, feel free to switch it off.

The On Premise File Server Tab is for use with an on premise file server for media files such as body cam videos or hard drive images. 250GB of cloud storage is included per CAL. We back up that data. If you're storing more data than that, you may want to consider purchasing a license to use with an On-Premise File Server, in which case you would be responsible for backing up that data. If the cost of the additional license is less than the cost associated with the cloud storage fees, you'll be coming out ahead.

The IP Whitelisting Tab allows you to control access to your SAFE site via IP address you specify to allow to have access.

System Configuration (continued)

Auto Disposition

To set up Auto Disposition to send Users a Task and/or Email letting them know their Case/Matter is up for Review, first go to Settings > Permission Groups, and specify which Groups can View/Create/Update things related to Auto Dispositions. Next, under Settings > Organization, click the Auto Disposition Tab. From the Auto Disposition Tab, click Edit, move the Auto Disposition slider to On. Choose a User the Auto Disposition email will appear to come from. Finally, assign Follow Up Dates to all Cases/Matters and click Save.

Under Allowed Media File Extensions, you can specify which types of Media you will allow to be uploaded to SAFE. You can also remove Media File Extensions you wish to prohibit Users from uploading.

Under Custom Views, create custom views for Items/Cases/People for all Users.

Creating Offices

If you need to segment Users or data you should consider creating Offices in Settings > Offices. Create your Offices before Users. If you already created Users then go to the Users setup area and change Office based permissions under Actions > Set Permissions.

Setting up Storage Locations

Each Office will need to have Storage Locations set up. Go to Tools > Storage Locations to create your locations. Click Add Storage Locations to start listing them. When finished, click the checkbox to the left of any Storage Locations you would like to assign Permissions to, and click the Edit Selected Storage Locations box. Next, click inside the Groups field to specify which Permission Groups you will



[Custom Forms](#)

Tools > Custom Data (Forms), is used to generate custom forms/fields that come up on Case/Matter, Person or Item entry pages. You can customize SAFE to capture information you want to receive. You can then take that information and put it onto a Label, or into a Report.

From Custom Data (Forms), click Add to Add a Form. Next, give your Form a name and choose if you will be attaching it to Cases/Matters, Persons, or Items.

From the Palette, click the "+" to make a selection which will then be placed onto your Canvas. Next, click the wrench icon to configure your selection. On the Properties Tab, you may now change the Display Name. If you chose a Select List, click the Options Tab to configure the choices. Click the "+" to add more options, or the red trashcan icon to remove them. Finally, click the Validation Tab and click the Required checkbox to make your Form Required, which will force the User to make a choice before they are allowed to proceed.

[Custom Forms Inclusion](#)

Once you create Custom Forms go to Settings > Organization and then click the Required Case/Matter, Item, or Persons Forms tab(s). Next, click in the Select a Form field and choose the Form you would like to attach to the Cases/Matters, Item Categories or types of People you specify. When you are done, click Save Changes. Your Custom Data (Forms) will then appear at the bottom of the Case/Matter, Item, or Person initial entry screen(s).

[Permission Groups](#)

Go to Settings > Permission Groups and click the Permissions Box for each Group and assign that Group the Permissions you'd like them to have by checking/unchecking selections.

[Creating Users in User Admin](#)

Go to Settings > User Admin and click Add. Fill in basic User information and assign the User to an Office and click ok. You will then be taken to the Permissions Matrix where you can choose which Offices the User will belong to and what Permissions they will have for each Office.

[Add a Case/Matter](#)

Go to Add > Case/Matter and create your first Case/Matter. Fill in as much data as you can. Fields with a red asterisk are Required.

[Add a Person](#)

After creating a Case/Matter you can add your first Person. Fill in as much data as you can. Fields with a red asterisk are Required.

[Add an Item](#)

Now start entering items within your Case/Matter. Click in the Item Belongs To field to add the Person you just created to this Item. Fill in as much data as you can. Fields with a red asterisk are Required.

When entering multiple Items with similar information, consider Duplicating that Item.

[Duplicating an Item](#)

From any Case/Matter, after you enter your first Item you may choose to Save & Duplicate an Item, or you may go to the Items tab from the Case View and select any Item and click the Actions box, then Duplicate Item. A lot of information will be populated so you don't have to keep entering in the same information over and over again. This is extremely helpful when entering in large numbers of Items.

[Splitting Items](#)

Same as the previous step but select Split Item instead of Duplicate to show an Item originated from a parent.

allow to have access to those Storage Locations, and click Save.

[Media](#)

Go to the Media tab within the Case/Matter View or Item View and click Add. You may then add Media at either the Case/Matter and/or Item levels.

[Notes](#)

Same as previous step but go to Notes Tab.

[Printing Labels & Running Reports](#)

Select an item you've entered, by clicking the checkbox to the left of View. Next, click the Reports box and select your Label or Report to run.

[Scanning Items](#)

Now that you have a Label with a barcode, go to the Scan section and scan the barcode. You may now perform a variety of functions related to those Item(s). Click the checkbox next to the Item(s) you're interested in. You may then click the Actions box to Check that Item In or Out, Move, or Dispose of it etc. If you select the Reports box, choose from a variety of Reports you may print, such as a Chain of Custody report.

[Reports Customization](#)

Don't like the way a report looks or want to change your Agency's address or Logo? Go to Settings > Report Builder and modify the HTML code.

[Discrepancy Reports](#)

Go to Settings > Discrepancy Report to test your first inventory. Give your Report a Name, then scan a Storage Location Barcode and begin scanning Items for your Report.

[Add Template Widgets to Dashboard](#)

Click the Add Widget box and select the pre-made Widgets you'd like to Add to your Dashboard.

