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 / Confirmation email, follow the instructions to get yourself set up with a password and get logged in.

Support Documentation

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

User Settings

Click the User Settings icon to the left of the Log Out icon in the Navigation Menu located in the top left hand corner. Change basic info, add a picture of yourself to your user account, set up Google Multi Factor Authentication or change your Password.

System Configuration

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

General

The General \ 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.

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.

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 \ General, click the Auto Disposition Tab. From the Auto Disposition Tab, click Edit, move the Auto Disposition slider to On. Choose a User or Group the Auto Disposition email will appear to come from. Finally, assign Follow Up Dates to all Cases/Matters and click Save.

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

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.

System Configuration (continued)

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.

Fields & Forms Settings

Fields & Forms Settings \ Field Settings
You may hide Case, Item, and Person 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.

Custom Forms

Tools > Custom Data (Forms), is used to generate custom forms/fields that come up on Case/Matter, Item, Person or User 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, Items, Persons, or Users.
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 trash can 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, Fields & Forms Settings and then click the Required Case/Matter, Item, Person, or User 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, types of People, or Users you specify. When you are done, click Save Changes. Your Custom Data (Forms) will then appear at the bottom of the Case/Matter, Item, Person, or User initial entry screen(s).

Dropdown Options

For Case/Matter Offense Types, Item Categories, Person Types, Media, and Notes Categories, click their respective tabs and 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 to the right column under Options in Use. Click Save Changes to save your changes before switching Tabs.

Item Transactions

For Checkout Reasons, Custody Reasons, and Disposal Methods, click their respective tabs and 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 to the right column under Options in Use. Click Save Changes to save your changes before switching Tabs.

For Verifications Settings, simply click the checkboxes to activate a setting for a type of transaction. Upon doing so, when performing that transaction you will be sent an email and a Task will be generated asking you to Verify it was really you that performed that action.

For Expected Return Date Notifications, you may click Edit and turn Auto Notification on. You may then set a Days Expired date. Now, when checking an Item Out, you can set an Expected Return Date. If the Item is not returned on that date, 'x' Days Expired later the Custodian of that Item will receive an email requesting it.

Creating Offices

If you need to segment Users or data you should consider creating Offices in Settings > Offices. Create your Offices before adding any User to the system. If you already created Users then go to Settings > User Admin and change Office based permissions by selecting Users and clicking Actions > Set Permissions.

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.

User Groups

Click Add to add a User Group.
You may then enter a Name and Description of your Group. After adding the group, select it and then Add Users to it. Creating User Groups is particularly helpful when assigning Tasks to multiple Users and also when using Auto Disposition.

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.

WorkFlows

Workflows are Alerts that can be set up in SAFE in the Settings > Workflows area. Perhaps a Notification of when a particular Item was entered or Disposed of would be helpful?
Click Add, give it a Name and attach it to either Cases or Items. Assign Users to receive the alert and choose how to notify them (via email, etc.). Execute the Workflow when… make a selection, then decide which Records to Use.
Typically, you may click Add a Filter Criteria where the Matching Criteria <Category> <equals> <Choose an Item Category for example>, before finally clicking Save.

Setting up Storage Locations

Each Office will need to have Storage Locations set up. Go to
Tools > Storage Locations to create your 'top-level' storage locations. Click Add Storage Locations to start listing them. After you are 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 allow to have access to those Storage Locations, and click Save.

After adding your 'top-level' locations, if you click the blue '+' in that Storage Location row, you can add nested Storage Locations underneath of it.

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

This is essentially the same asDuplicating an Item, but selecting Split Item instead of Duplicate will show an Item originated from a parent, and you will be able to see the Parent / Child relationship.

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 the previous step but go to the Notes Tab.

Tasks

Tasks can be created by any User for another User to do something related to a Case/Matter, Item, etc. They replace email within the software.

From the Tasks tab, click Add Task to add a Task directly to your Case/Matter. You will then need to enter a required Title, Message, and assign Users or Groups to the Task. The Case/Matter will automatically be linked in the Linked Objects section.

If you'd like to add a Task related to Items, from the Items tab, select any Items you'd like, click the Actions box, and then click Add to Task. Your Case/Matter # will be pre-populated in the Title of the Task, and your Items will automatically be linked in the Linked Objects section. You will need to enter a required message and assign Users or Groups to the Task.

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 a 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 Tools > Report Builder and modify the HTML code if you have the appropriate Permissions to do so.

Discrepancy Reports

Go to Tools > 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.

Random Audits

Go to Tools > Random Audits to test if Items are where they are supposed to be!. Give your Random Audit a Name, and make selections such as Item Category, then you may choose to randomly audit a percentage or number of items. Find the displayed Items and scan their Barcodes before running 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.