Shared Archive For Evidence

SAFE Reference manual for General Users

Version 10.26.2017

The purpose of this reference manual is to be an assistance to the most basic users of the system. It is not intended to be an all encompassing manual used by system administrators. If you are tasked with training users with limited add only access or you are a person using the system to add items and print basic forms, then this is the manual for you!

Important! Because of the customization that is available to your agency, the screen shots and explanations covered in this guide may not be exactly what you will see when using your system. We did not design this guide to cover a specific user but to help all users. With this in mind, the guide you are reading in its current format should be a great resource for assisting you learning the software.

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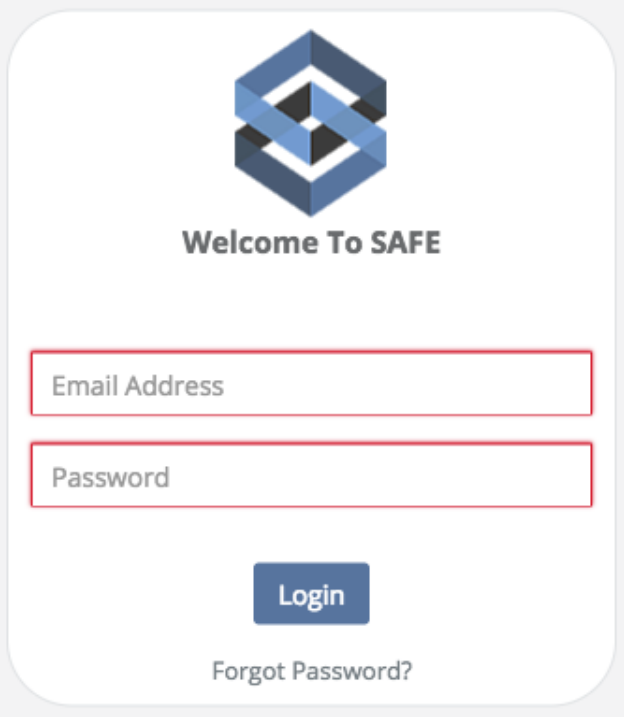
Logging into the software (Shared Archive For Evidence)

Logging into the software is as simple as opening your browser of choice and typing in your site link. Your network or organization administrator can provide this link. If this link is entered correctly, you will see a login page like the screen below. Enter your Email and Password to log into the system. If you see anything other than this login screen, you will need to contact your system administrator for assistance.

United States: https://secure.trackerproducts.com

Asia Pacific: https://apac.trackerproducts.com



Can the software store my Password?

Saving Names and Passwords is **NOT** a feature of the software for obvious **security reasons**. Instead, this is a function of the web browser you are using. When any web browser asks if you would like to save your Name and Password, select **No**. If you have inadvertently saved your Name and Password, **tell your Administrator immediately.** They can **delete the saved Name and Password and clear the web browser's cache**.

Authenticating / Forgot Password? / Password RESET

This is the initial email you will be sent before logging into the software for the first time.

Welcome to SAFE!

Hello New User,

A request was just made to allow NewUser@gmail.com access to the SAFE system. Before you can continue you need to verify the request. Confirm your email address.

Once you have confirmed your account you can proceed to the SAFE login screen.

Site: https://secure.trackerproducts.com

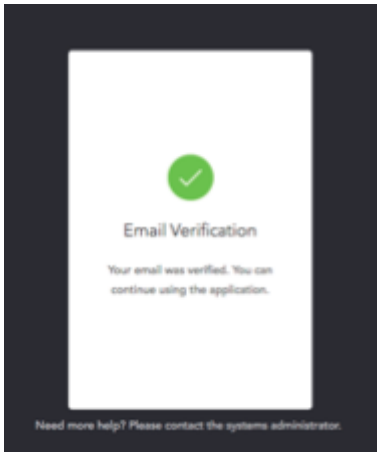
Thanks,

The SAFE team!

Once you receive this email:

1. Click the option to Confirm your email address.
2. Login with the Username and Password provided right below the confirmation.

This is the screen that will be shown after you verify your email address.



If you change your email address for any reason in the software, this will be the confirmation email.

Email Change Notification and Confirmation

Hello Ben's Yahoo Email,

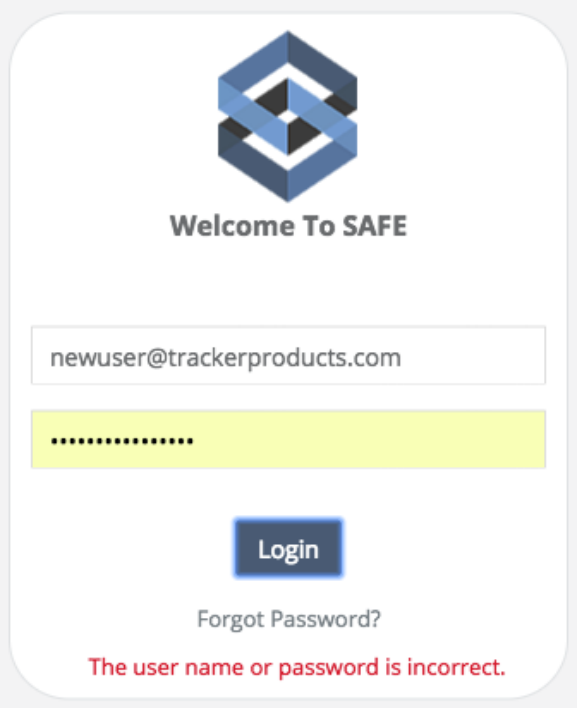
Apparently your email address in the SAFE system has changed. In order to complete the request we need you to confirm that this email address is value. Confirm here.

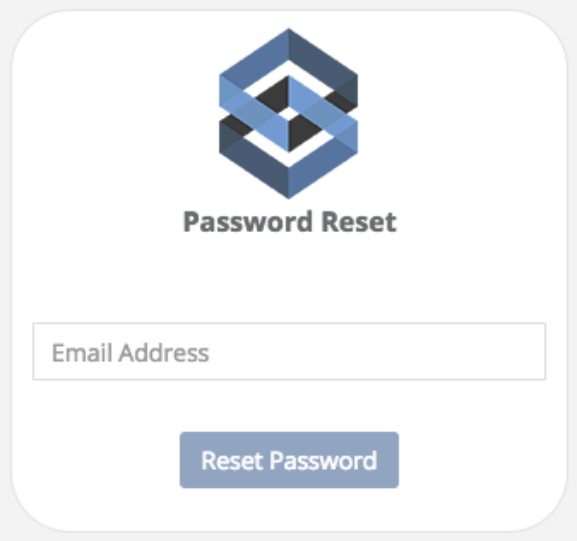
Please be aware that since your login name is your email address you need to login with this new email address.

Thanks,

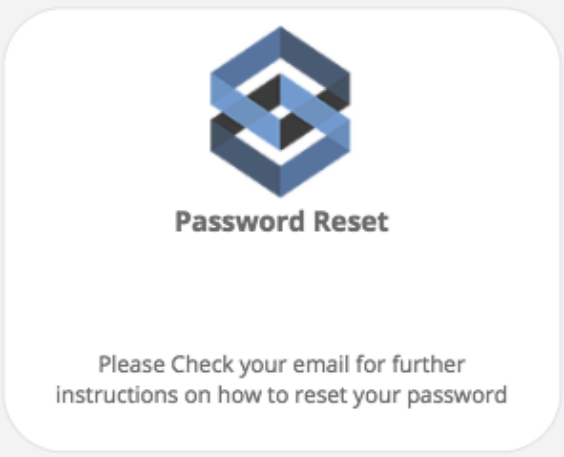
The SAFE team!

If you entered an incorrect name or password, the software will let you know that your “user name or password is incorrect”. ***If you have forgotten or wish to Reset your Password, CLICK THE WORDS “Forgot Password?”.*** Selecting this option will send you to the Password Reset page. After entering your email address and clicking the “Reset Password” box, an email with directions will be sent to you to reset your password.

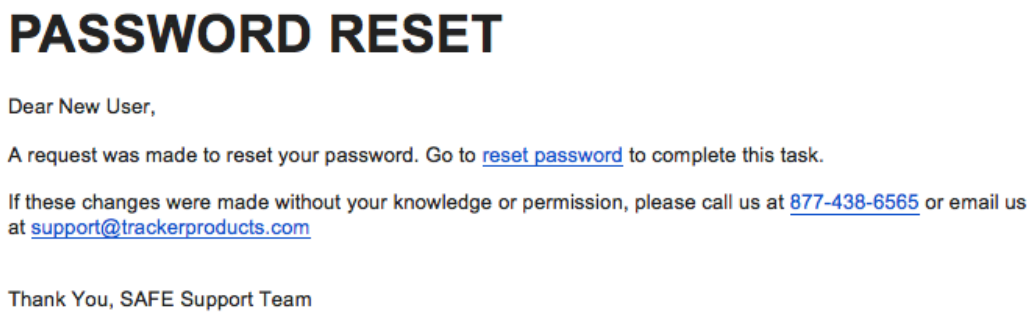




After entering your Email Address, this screen will be shown.



Once you receive the Password Change Request email, click the words "**reset password**" and you will be taken to the Password Reset page.



PASSWORD RESET

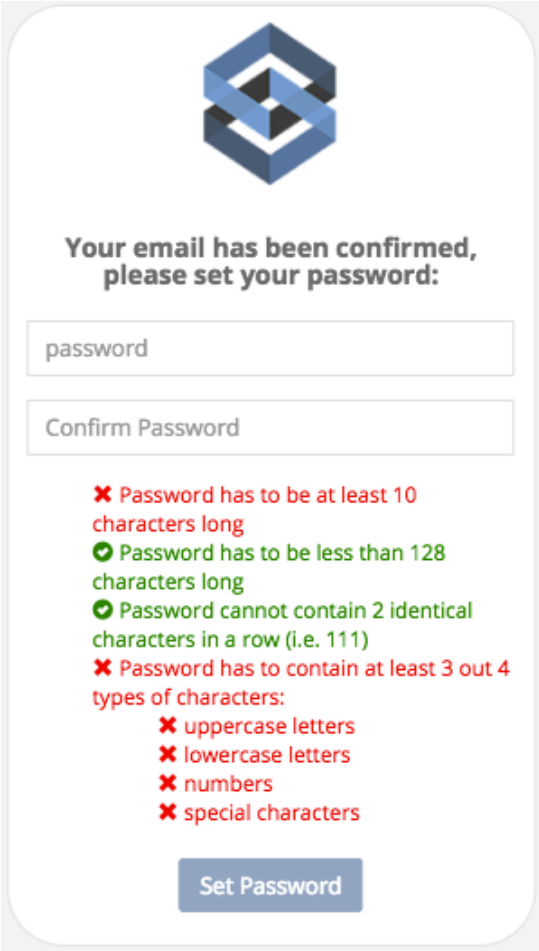
Dear New User,

A request was made to reset your password. Go to reset password to complete this task.

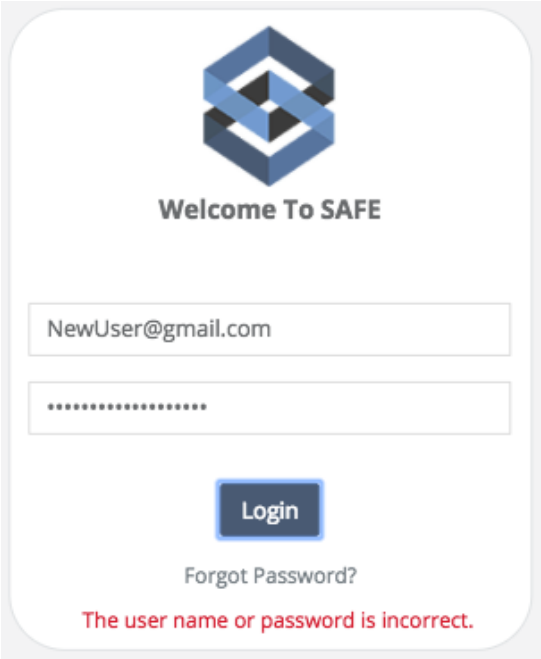
If these changes were made without your knowledge or permission, please call us at 877-438-6565 or email us at support@trackerproducts.com

Thank You, SAFE Support Team

At the Password Reset page, the software requires each user to have a unique username and password that must be entered each time a user logs on. Password strength parameters are enforced by the application and include: Password lengths of 10-128 characters, passwords cannot contain 2 identical characters in a row, must contain at least 3 character types out of 4 (upper case, lower case, numbers, and special characters), and passwords cannot be "reused" for one year. In addition, accounts are locked after 5 failed login attempts for a duration of 10 minutes or until they're unlocked by an administrator.



Failed Login example:



Upon successful new password entry and verification, you will be taken to a screen that says as much and you will then be able to log into the software.

Creating a shortcut on your desktop

The most efficient way to use the software is to create a desktop shortcut as follows:

Microsoft Windows

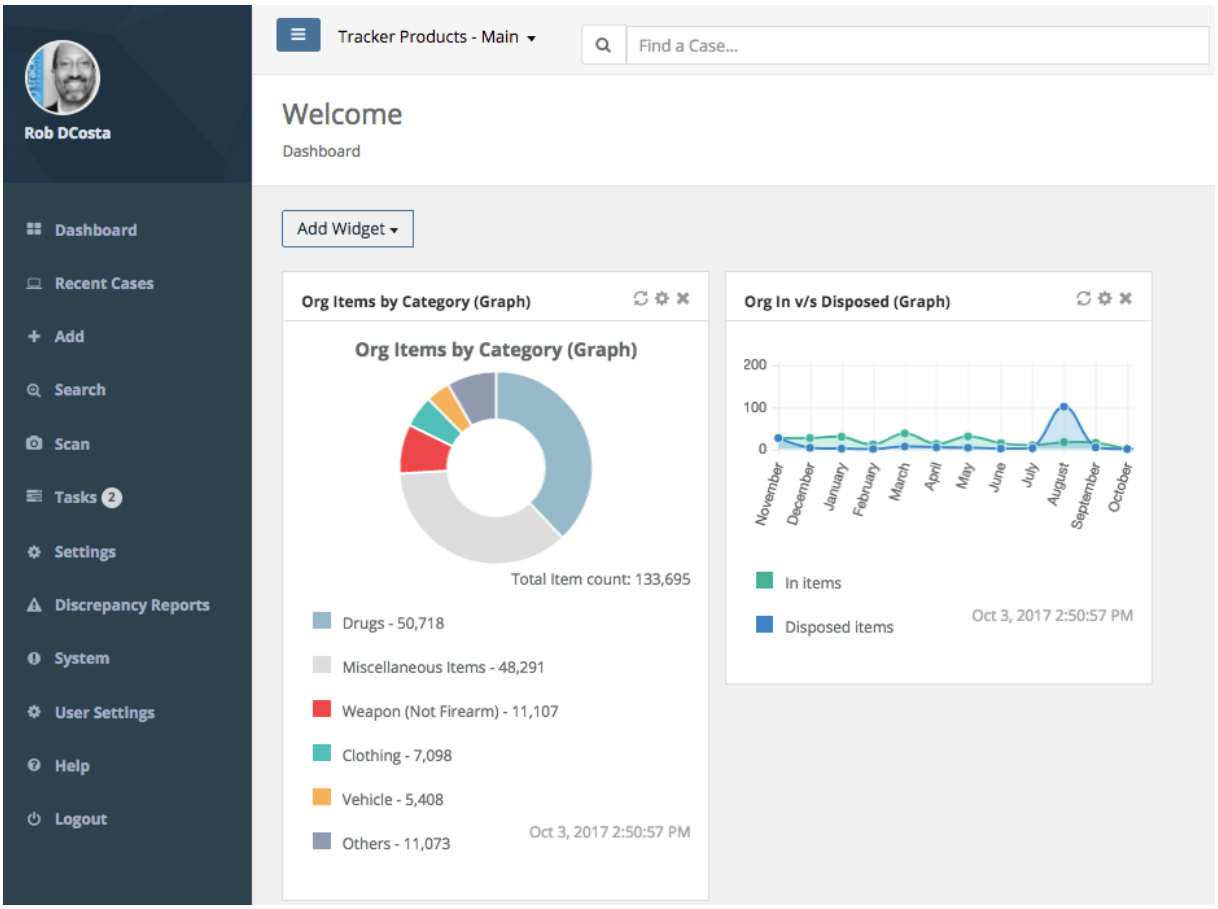
1. In Microsoft Windows, minimize all the programs that are open on your desktop.
2. Right click on an open spot on your desktop.
3. Select New.
4. Select Shortcut.
5. Enter your software link into the location box.
6. Click next when done.
7. This screen should contain the name for the link.
8. Click finish and test your icon.

Apple Mac

1.On a Mac, Launch the Safari Web browser on your Mac OS X system.
2.Navigate to the first page to which you want to create a shortcut.
3.Select the entire address in the address bar at the top of the browser.
4.Click and drag the address onto the Mac OS X desktop and release the mouse button.

Dashboard and Quick Menu

Users that have successfully logged into the system will initially see a blank **Dashboard** and a **Quick Menu** screen (on the left), as shown below. The **Dashboard** can be customized by the current user with **Widgets** (shortcuts/saved searches) to help save you time with searches! This procedure is fully explained in an upcoming section.



The Quick Menu Screen provides nearly all of the functionality in the system. This streamlined structure provides a great deal of time efficiency. Depending on your level of permissions, you may or may not see all the functionality listed on the left hand side of this screen.

Creating a Case, Item, or Person

Creating a Case, Item or Person are some of most fundamental and important areas of the software system. The next section will guide you through the basic setup required to get your system off the ground.

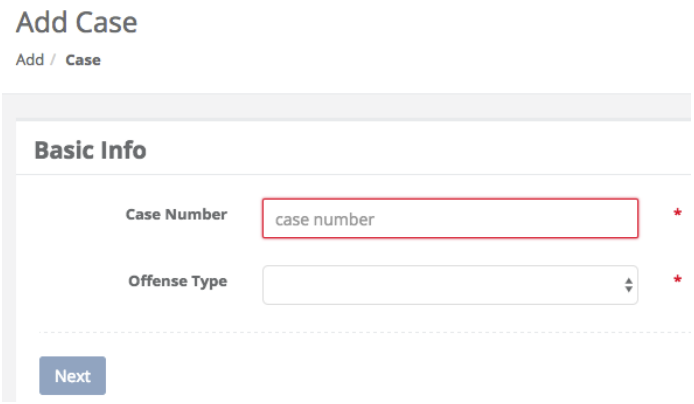
Client specific: The term Case is typically used by police agencies. This wording can be changed to a variety of terms such as incident, matter, asset category, etc. This option will be set by the system administrator. For the purpose of this guide we will use the term Case.

Creating a Case

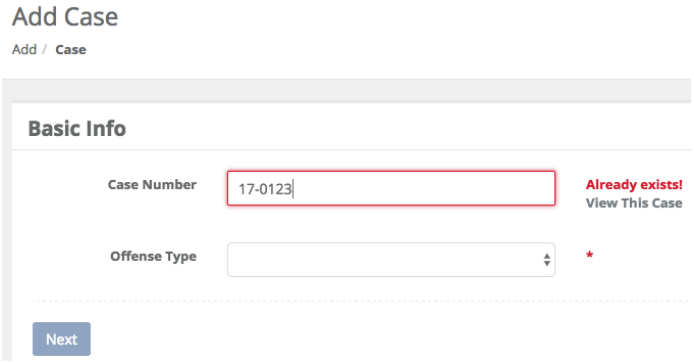
Quick Menu » + Add \ Case

When adding new items to the system, users begin by creating a new **Case/Project** to contain them. Depending on your organization's industry and preferences, your tracking containers may be referred to as either **Cases, Incidents, Matters, or projects**. All are exactly the same thing. Think of your Cases/Incidents/Matters/Projects as containers or folders for groups of Items and the Persons associated with them. **Persons** and **items** must be placed within previously established Cases/Incidents/Matters/Projects. Therefore, the **Cases/Projects** must be created prior to the Items and Persons that will be placed inside of them.

1. From the **+ Add** menu on the left hand side of the screen, select **Case**. You are now on the **Add Case** screen. Enter a **Required** valid **Case/Project Number** based on your organization's naming strategy and an **Offense Type**. *Consider that a consistent, well thought out naming strategy will increase your overall organization and ability to locate projects and items in the future. Example: 03-16-2010-A, 03-16-2010-B, 03-16-2010-C... incorporate the case/project creation date for the first part of the name and alphabetic increments to differentiate cases/projects entered on the same day.*

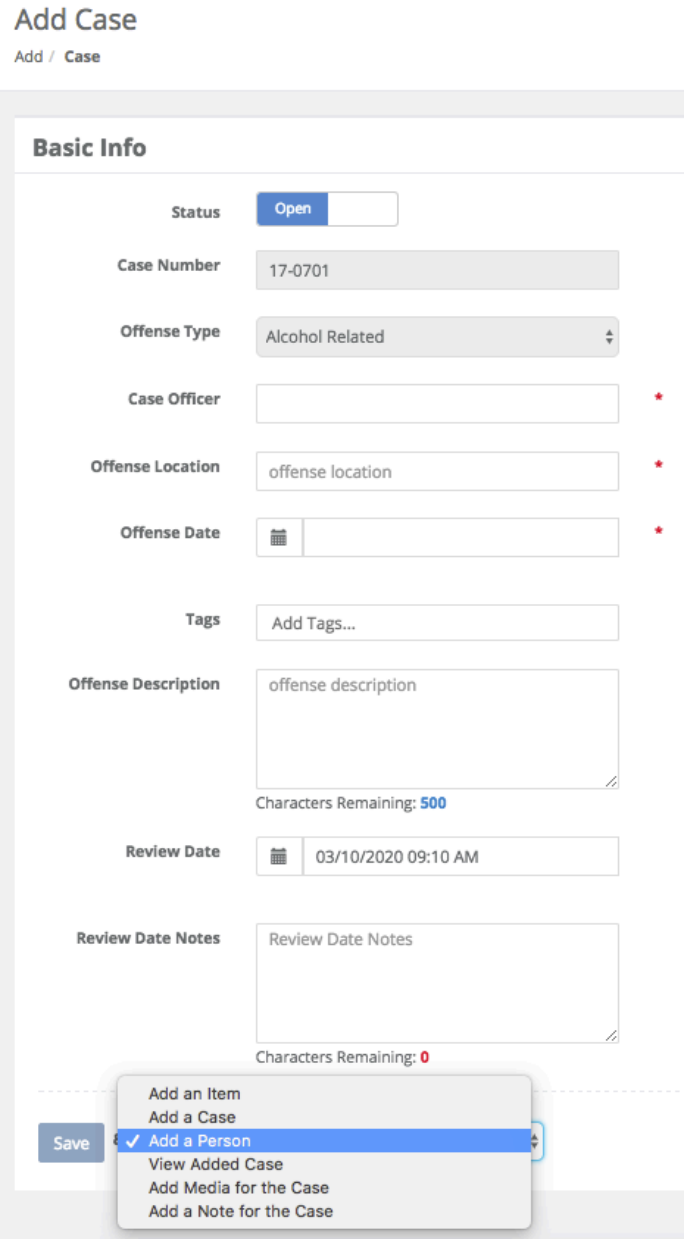


If you have entered a pre-existing Case, the following will appear, at which time you may View the pre-existing Case.



2. Once you have successfully entered a **Required,** valid **Case/Project Number** and **Offense Type**, and clicked **Next**, the software performs a check to ensure that the **Case/Project Number** entered does not already exist. Because the tracking system is designed to track unique cases/projects and items, it is essential that each Case/Project is given a unique number. This safety feature prevents Case duplication.

You must now enter a **Required Case Officer**, **Offense Location**, and **Offense Date**. Next, add any **Tags** and/or an **Offense Description** to the **Case** you just created. SAFE will generate a **Review Date** based on the specific follow up dates your administrator enters into the system for each Case Offense (in Auto Disposition). You may enter **Review Date Notes,** if you have permissions, then choose how you would like to proceed. Whether that is saving the **Basic Info**, then **Adding an Item**, or **Adding a Person** etc. When you have made your choice, click **Save**.



Fields on the Add Case Page

Status
Is this an Open or Closed Case?

Case Number
A unique number that differentiates cases/projects in the system. This is a **Required** field.

Offense Type
Click anywhere in the Offense Type field to bring up a list of offenses to choose from. This is a **Required** field.

Case Officer
Name of the person in charge of the case, which is **Required** (must be an Active User).

Offense Location
The location where the offense took place. This is a **Required** field.

Offense Date
The **Date and Time** the offense took place. This is a **Required** field. Click the calendar icon, then pick a time and day. If no time is selected, the system will default to the current time.

Tags
A searchable label any User can create that is attached to a Case or Item for the purpose of identification. Click anywhere inside the Tags field to bring up a list of available Tag options to choose from.

Offense Description
Type a brief description of the Offense which occurred.

Review Date
Based on the specific Follow Up Date(s) your administrator enters into the system for each Case Offense, SAFE will generate a Review Date which will show when the Case will be up for Review.

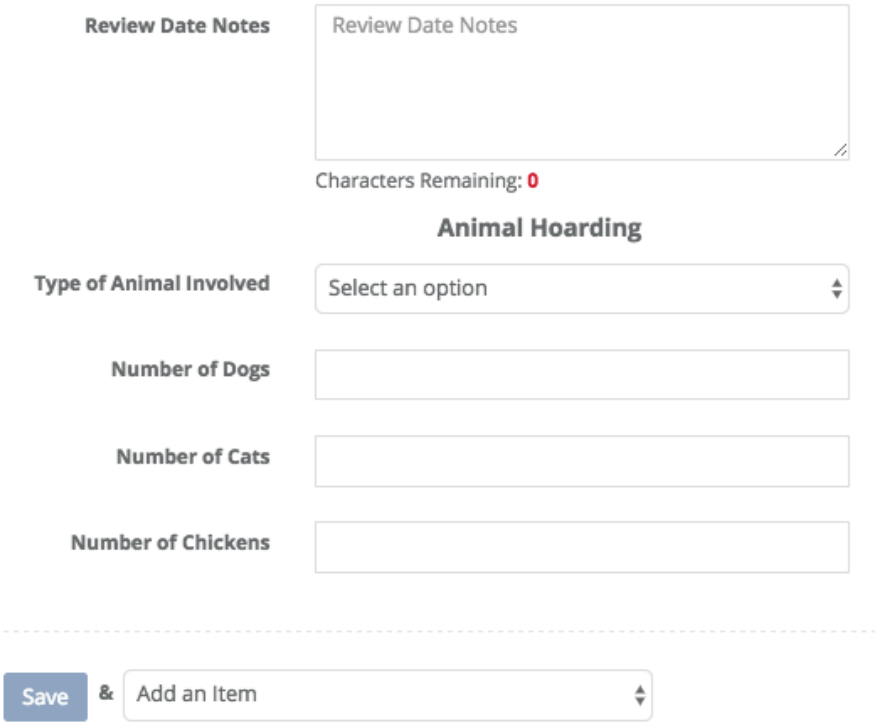
Review Date Notes
You may enter notes in this field that pertain to when the next review date is if you have the appropriate Permissions to do so.

3. In addition to the Basic Info Add Case fields, you may be asked to fill out additional **Fields** if you enter a **Case** containing a particular **Offense Type**. For example, if you choose the **Offense Type** Animal Hoarding, an administrator may have added a **Form** to be filled out.

*FYI: Some data entry fields may have requirements set by your system administrator. For example, when entering numbers on a **Custom Form,** the field does not allow multiple dots to be entered. The field will allow a single dot like "12.1" but not "12.1." or "12.1.2." to be entered. There may be other requirements like a number field must be positive, in which case, you can't enter a negative number. Any field that has not met the required standard will show a red glow around the field (telling you that it must be fixed before you can save).*

This field does not meet the required validation and must be corrected before saving.

This is an example of a Case entry screen with a Custom Form at the bottom. This Case relating to Animal Hoarding was setup by the system administrator with a Custom Form designed to obtain additional information.



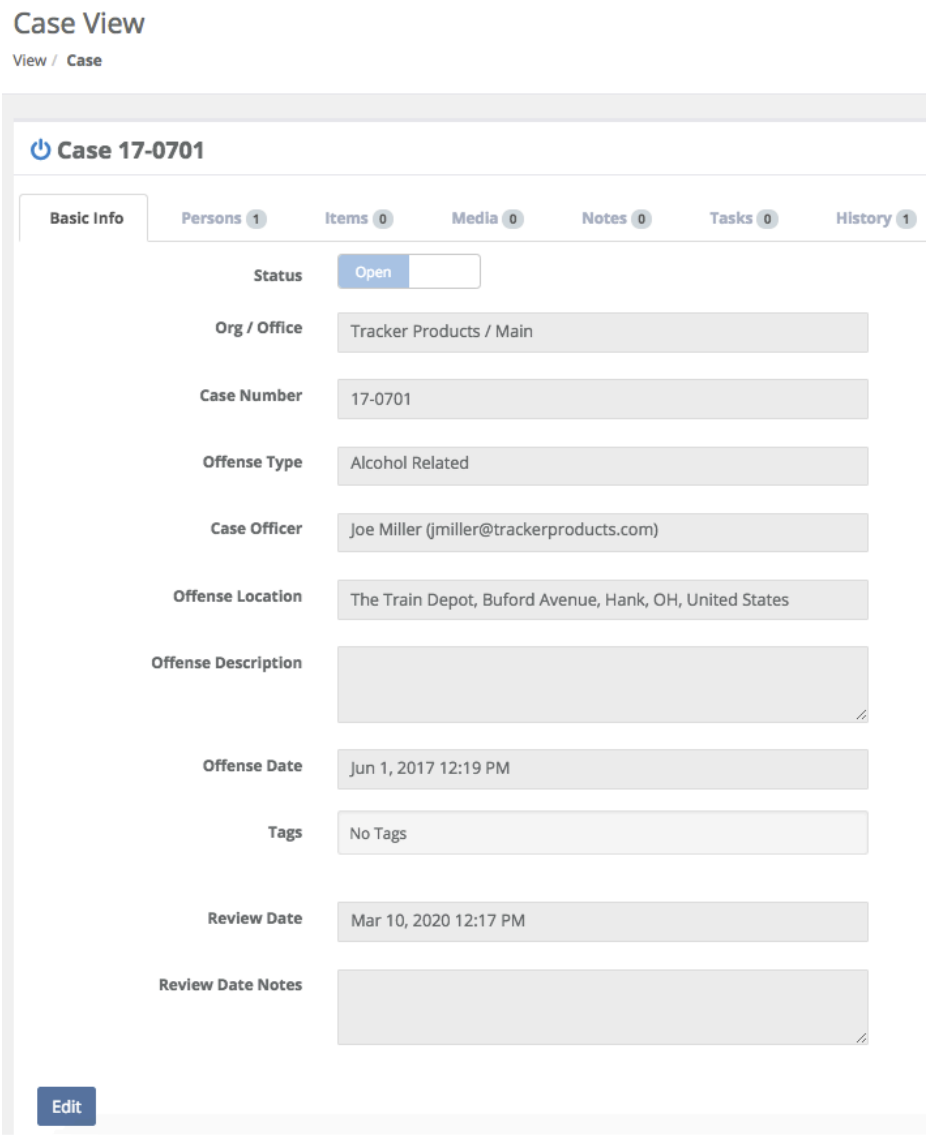
Saving a Case

Once you have filled in all of the required fields you will go to the bottom of the Case Entry screen and you will see a Save button.

If that button is light in color (like this one is), something is not right and you must fix it. You can't Save a Case until all fields have met the required validation.

Now that the button is no longer lightly colored, click the Save button to save your Case.

After successfully saving your case you are now on the Case View screen. From here you can select many options from within the **Case** or go to your Quick Menu on the left to go elsewhere.

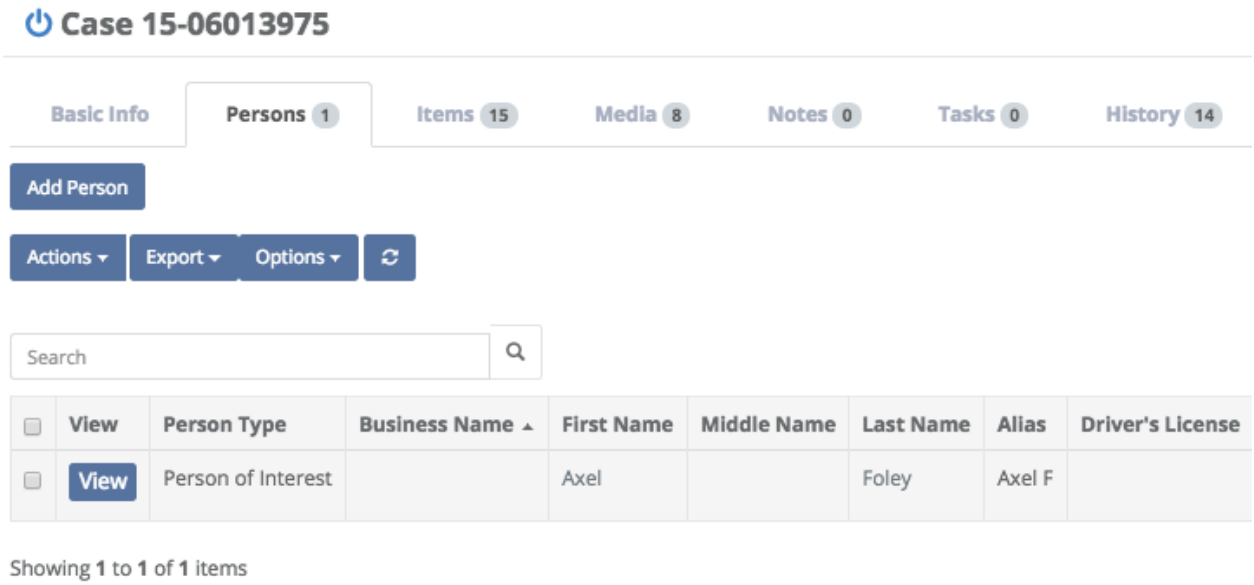


Creating a Person

1. Quick Menu » + Add \ Person
2. From the Case View (Previous Screenshot) click the Persons Tab

What is the difference between a Person in your Organization and a Person in a Case?

> **Person in your Organization** – The software is set up in such a way that every person in your Organization is unique. This means you enter a Person one time and then use that one Person everywhere in the Organization. Therefore, if you create John Doe as a Person in the Organization, you can then use John Doe on the Checkout Screen, Item Entry Screen and many other places.
>
> **Person in a Case** - So, just like I can check an item out to John Doe or enter an item for John Doe, I can also make John Doe a Type of person in my case.



This is the Persons Tab from within the case I was viewing. You will not see these options if you go to the Quick Menu \ Add \ Person.

Adding a Person

1. Quick Menu \ Add \ Person

Type the **Required** **First Name** and **Last Name** of the **Person** you would like to add. You may also choose to enter a **Business Name**, in which case First and Last name will not be required. Next, type in their Address and **Add** them to a **Case** or choose a **Person Type**. Finally, click **Save & <Choose an Option>**.

Person
Business Name
Business Name
First Name
First Name
*
Middle Name
Middle Name
Last Name
Last Name
*
Alias
Alias
Driver's License
Driver's License
Race
Unknown
Gender
Unknown
Date of Birth
Mobile Phone
Mobile Phone
Other Phone
Other Phone
Email
Email
Deceased
Juvenile
Address
Type
Country
United States
Address 1
Address 1
Address 2
Address 2
City
City
State
Postal Code
Postal Code
Add to Case
Add to Case
Person Type
Note
Save
Add an Item
Add a Person
View Added Person
View Case

Fields on the Add Person Page

Business Name
Type the name of the business you wish to add. If you choose to do this, a first and last name will no longer be required, as it is irrelevant.

First Name
Type the first name of the person you wish to add. This is a **Required** field.

Middle Name
Type the middle name of the person you wish to add if you know what it is.

Last Name
Type the last name of the person you wish to add. This is a **Required** field.

Alias
Type in an Alias (other names this person goes by) for this person if they have them.

Driver's License
Type in the Driver's License number for this individual.

Race
Click anywhere in the Race field to bring up a list of options to choose from.

Gender
Click anywhere in the Gender field to bring up a list of options to choose from.

Date of Birth
Record their date of birth in this field. You may wish to use the calendar icon in this field, or enter the date manually.

Mobile Phone
Type in a mobile phone number that is associated with this person.

Other Phone
Type in a phone number that is associated with this person.

Email
If they have an email address they wish to disclose, enter that here.

Type
Type of Address associated with this Person/Business (Work, Home, or Other).

Line 1 / Line 2
Type the Work, Home, or Other Address of this c

City
Type the City this Person/Business is located in.

Postal Code
Type the Postal Code for this Person/Business (known as a zip code in the United States).

Country
The country this Person/Business is located in. Choose via the selectable list.

Deceased
Is this individual still alive?

Juvenile
Click the box next to juvenile if the individual is under age 18. This box is based solely on age, not attitude.

Add to Case
Type the exact Case Number you would like to add this individual to.

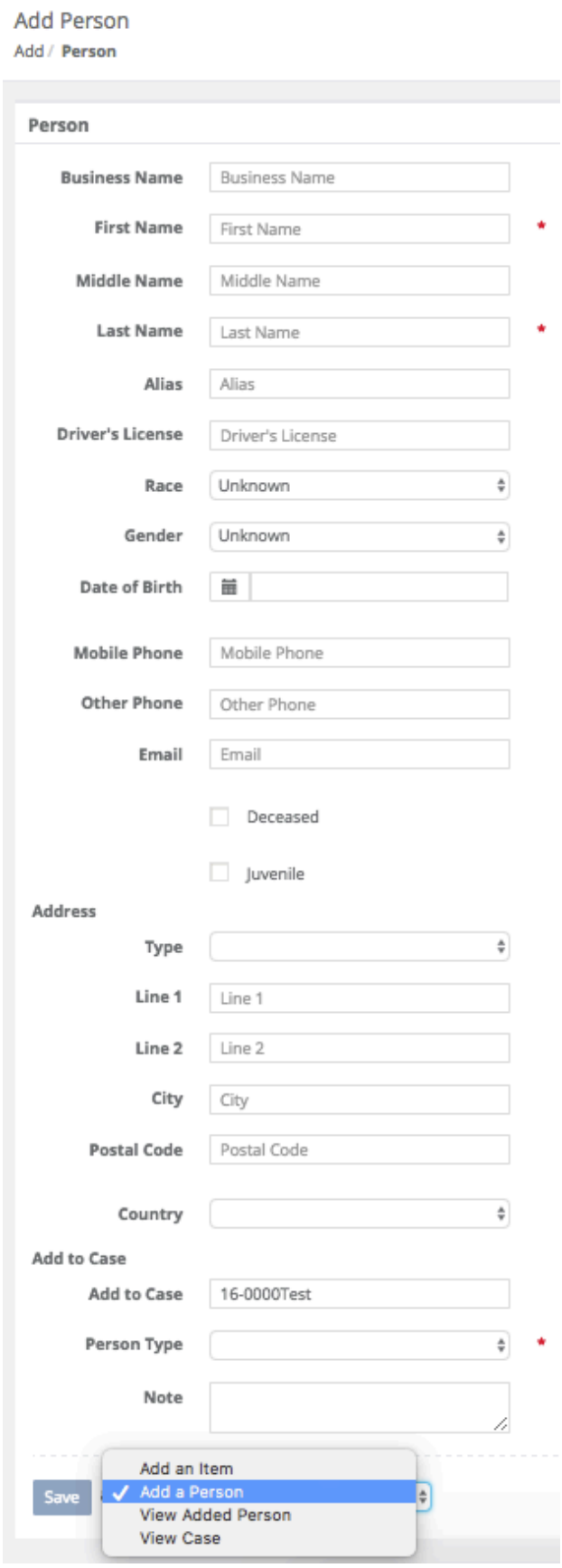
Person Type
Click anywhere in the Person Type field to bring up a list of options to choose from. This is a **Required** field.

Note
You may type a brief Note, perhaps with information regarding this individual.

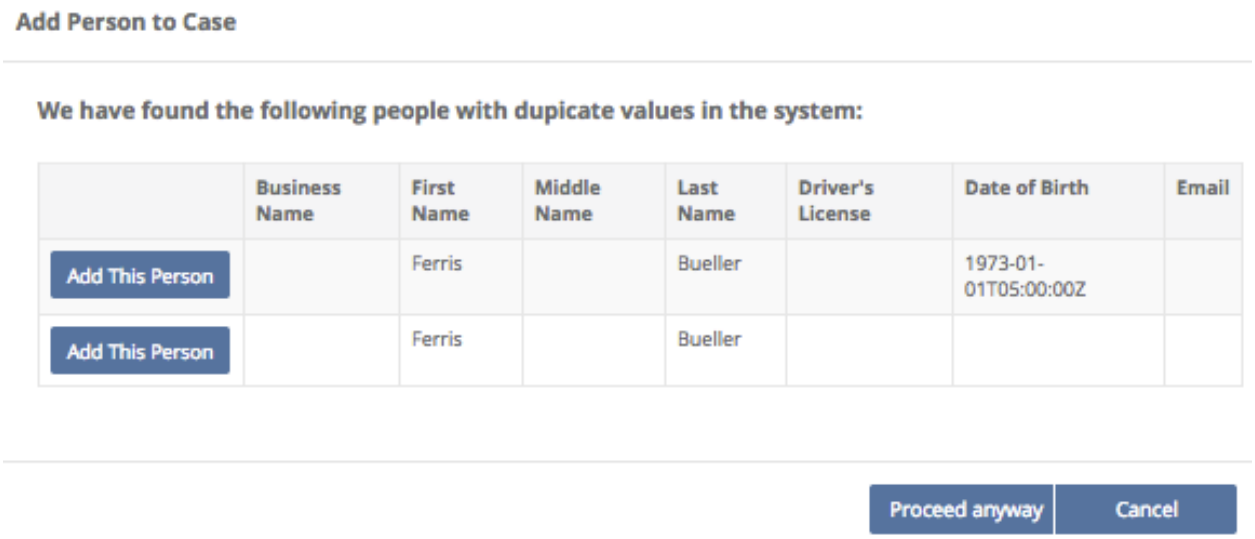
Buttons on the Add Person Page
Save
This button saves the information you just entered about the Person. Next to it, you can make additional choices.

Adding a Person to a Case (from the Case View)

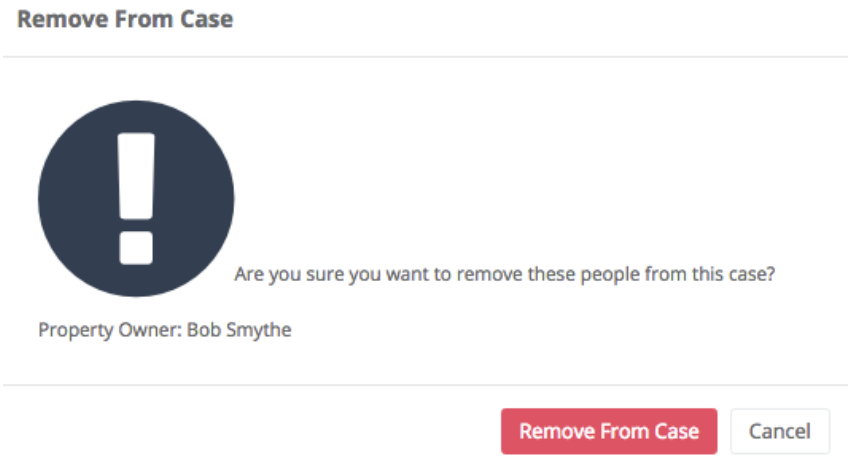
On the Case View screen, click the Persons tab, then click **Add Person**. This will take you to the **Add Person** screen. Type the **Required** **First Name** and **Last Name** of the **Person** you would like to add to the **Case** you were just viewing. You may also choose to enter a **Business Name**, in which case First and Last name will not be required. The **Add to Case** field will have the Case Number of the **Case** you were just viewing. Finally select a **Required** **Person Type** and click **Save & <Choose an Option>**.


Add Person
Add / Person
Person
Business Name
Business Name
First Name
First Name
Middle Name
Middle Name
Last Name
Last Name
Alias
Alias
Driver's License
Driver's License
Race
Unknown
Gender
Unknown
Date of Birth
Mobile Phone
Mobile Phone
Other Phone
Other Phone
Email
Email
Deceased
Juvenile
Address
Type
Line 1
Line 1
Line 2
Line 2
City
City
Postal Code
Postal Code
Country
Add to Case
Add to Case
16-0000Test
Person Type
Note
Add an Item
Add a Person
View Added Person
View Case
Save

After clicking **Save & <Choose an Option>,** if the person you just added has a duplicate(s) in the system, the following pop-up will appear.



You may now click **Add This Person**, or **Cancel**. Once the **Person** is saved in the **Case**, and you are back on the **Persons Tab** of the **Case View** screen, you can continue to add Persons. You also have the option from the **Actions Menu** of **Removing the Selected Person** from the **Case** you're viewing (if you have the appropriate permissions). First, select the Person you wish to Remove, then click the **Actions Menu** and choose **Remove Selected Person**.



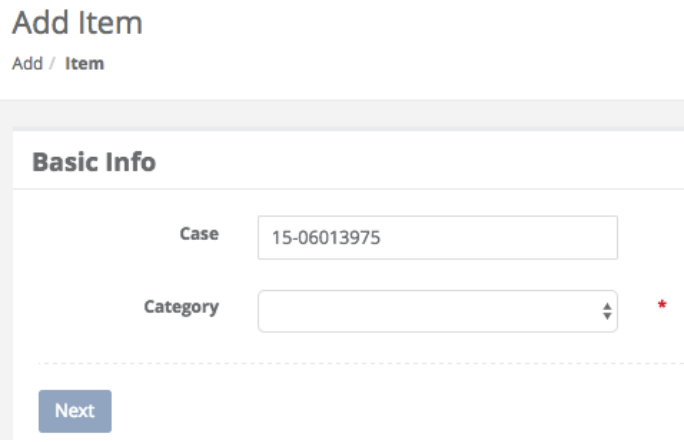
You can now **Remove** that person from the **Case**.

Creating an Item

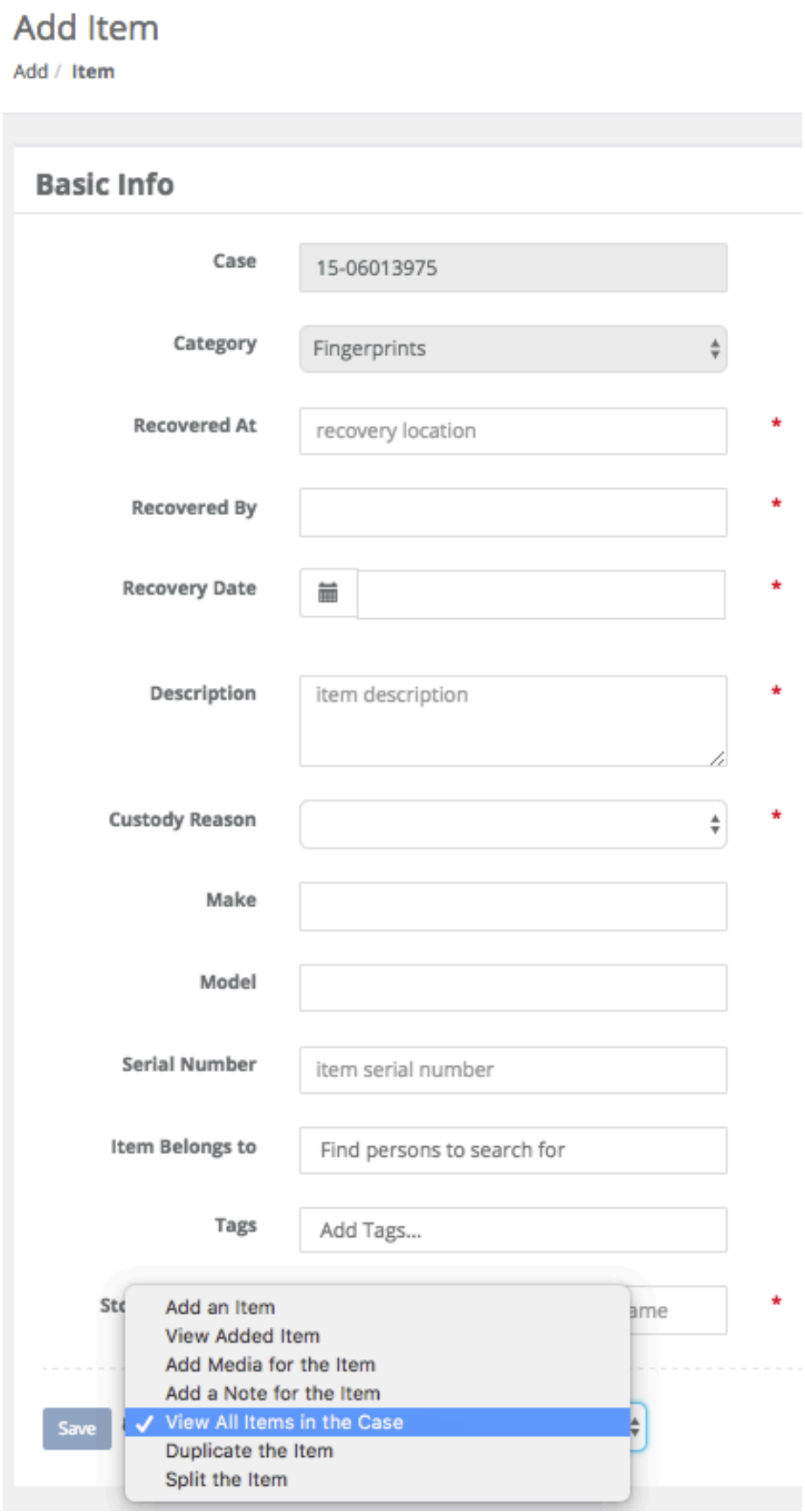
Quick Menu » + Add \ Item

Once you have successfully created a new case/project and added the appropriate persons to it, you may begin to create and add unique **items** to it. You can add as many items to any case/project as you wish. Begin the process of creating and adding items to your new case by clicking the **Save and add item** button at the bottom of the 'Add person' or 'New case' submission pages.

From the **+ Add** menu on the left hand side of the screen, select **Item**. This takes you to the Add Item screen. Enter a **Required** valid **Case/Project Number** you would like to add an item to. Also enter a **Required** category the item belongs to and click **Next**.



2. Once you have successfully entered a **Required** valid **Case/Project Number** and **Category**, and clicked **Next**, you must now enter a few more **Required** fields. The **Required** fields are **Recovered At**, **Recovered By**, **Recovery Date**, **Description**, **Custody Reason**, and **Storage Location**. Once you have entered these, you may add additional information to the **Item** you are creating, such as the **Make**, **Model**, **Serial Number** etc.


Add Item
Add / Item
Basic Info
Case
15-06013975
Category
Fingerprints
Recovered At
recovery location
Recovered By
Recovery Date
Description
item description
Custody Reason
Make
Model
Serial Number
item serial number
Item Belongs to
Find persons to search for
Tags
Add Tags...
Add an Item
View Added Item
Add Media for the Item
Add a Note for the Item
View All Items in the Case
Duplicate the Item
Split the Item
Save

Fields on the Add Item Page

Case
Type the name of the case you want to add the item to. This is a **Required** field.

Category
Click anywhere in the **Required** Category field to bring up a list of options to choose from.

Recovered At
Type the location the item was recovered at. This is a **Required** field.

Recovered By
Enter who the item was Recovered By here. This is a **Required** field.

Recovery Date
When, and at what time was the item recovered? This is a **Required** field. You may wish to use the calendar icon in this field, or enter the date and time manually.

Description
Enter a brief Description of the item here. This is a **Required** field.

Custody Reason
What is the reason for having this item? Click anywhere in the Custody Reason field to bring up a list of options to choose from. This is a **Required** field.

Make
Type the Make of the item.

Model
What Model is the item? For example, Dodge is the make, Viper is the model.

Serial Number
If the item had a Serial Number, enter it here.

Item Belongs To
Who does the item belong to? Type that Person's name here.

Tags
A searchable label any User can create that is attached to a Case or Item for the purpose of identification. Click anywhere inside the Tags field and start typing to bring up a list of available Tag options (which have already been entered) to choose from.

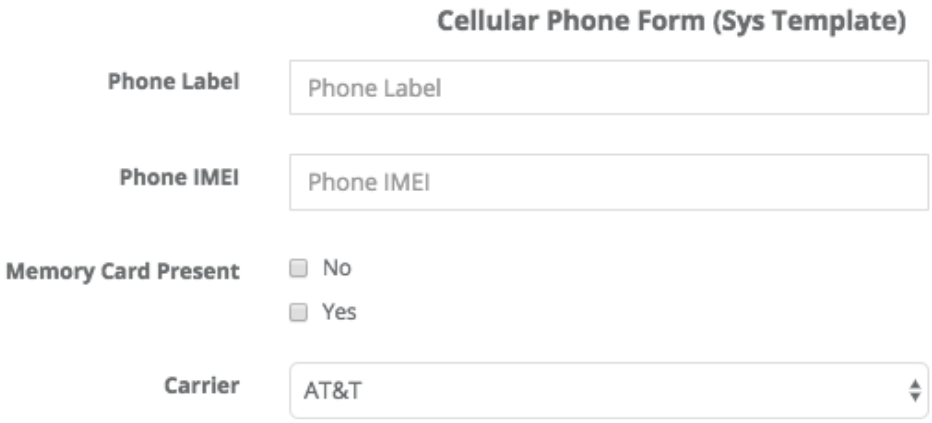
Storage Location
This is where the Item is currently located. For example, this may be a Temporary Locker, a box on a shelf in your evidence room, or a safe. This is a **Required** field.

Buttons on the Add Item Page

Save

This button saves the information you just entered about the Item. Next to it, you can make additional choices.

3. In addition to the Basic Info Add Item fields, you may be asked to fill out additional **Fields** if the **Item** entered belongs to a particular **Category**. For example, if you chose the **Category Cellular Phone**, an administrator may have attached a **Cellular Phone Form** to be filled out. When using a number on a **Custom Form,** the field does not allow multiple dots to be entered. The field will allow a single dot like “12.1” but not “12.1.” or “12.1.2.” to be entered.



Fields on the Phone Form

Phone Label

Is there a label on the phone? If so, enter it here.

Phone IMEI

IMEI stands for **International Mobile Equipment Identity** and is a unique identifier for a mobile device. **IMEI** is a form of ESN (Electronic Serial Number). **IMEI** numbers are typically 15 digit numbers.

Memory Card Present

Was a memory card present when the phone was obtained? Check Yes or No.

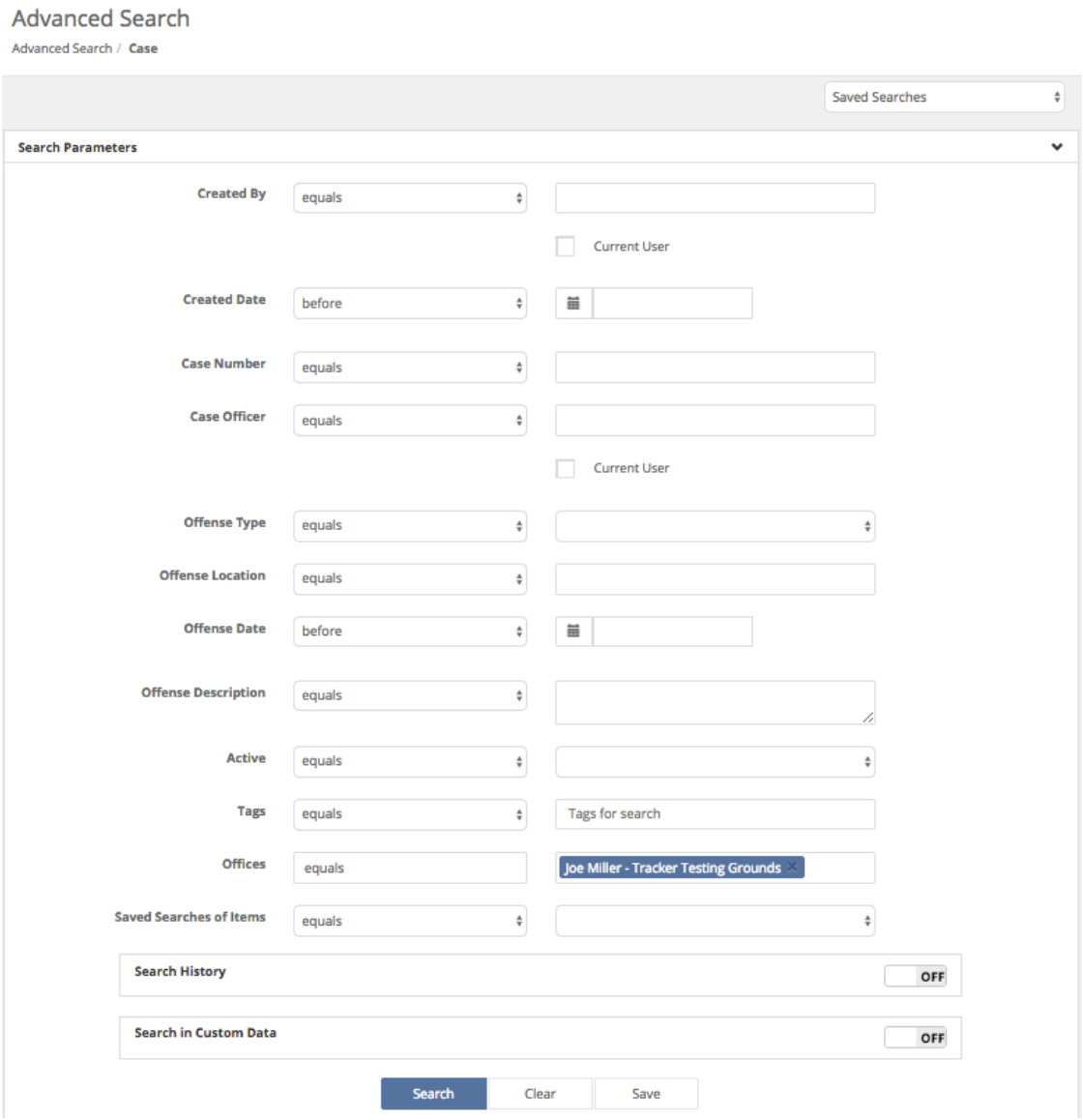
Carrier

What carrier is associated with this phone? Choose AT&T, Verizon etc.

Searching for a Case(s)

Quick Menu » Search \ Cases

Click **Search** from the Quick Menu on the left hand side of the screen and select **Cases**. This will take you to the Advanced Search Case screen. From here, you can customize the search parameters by selecting boxes with the two small triangles (on the right side of the box). Choose from a number of variables depending on what case(s) you're searching for. Or, if you know the Case Number, simply type it in and click **Search**. This will show the case you searched for.



More information regarding **Searches** can be found by listening to our webinar:

SAFE Sessions - Advanced Searching @ https://vimeo.com/202443717/e9eb495b03

Fields on the Case Search page

Created By

Choose either ‘equals’ or ‘not equals’, then enter the name of the person who created the case. You may also choose to select ‘Use the logged in user for this search’.

Created Date

The date the Case was created. Click anywhere in the Created Date field to bring up a list of options to choose from. Next, in the box to the right of the Created Date field, there is a Calendar field where you can enter your parameters.

Case Number

Click anywhere in the Case Number field to bring up a list of options to choose from. Next, in the box to the right of the Case Number field, enter your parameters.

Case Officer

Click anywhere in the Case Officer field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Case Officer field, you may type the name of an Officer this Case belongs to, depending on your search requirements.

Offense Type

What type of offense is this? Click anywhere in the Offense Type field and choose ‘equals’ or ‘not equals’. Next, click anywhere in the box to the right of the Offense Type field and choose an offense.

Offense Location

Where the offense was committed. Click anywhere in the Offense Location field to bring up a list of options to choose from. Next, in the box to the right of the Offense Location field, enter your parameters.

Offense Date

When the offense was committed. Click anywhere in the Offense Date field to bring up a list of options to choose from. Next, in the box to the right of the Offense Date field, there is a Calendar field where you can enter your parameters.

Offense Description

Click anywhere in the Offense Description field to bring up a list of options to choose from. Next, in the box to the right of the Offense Description field, enter your parameters.

Active

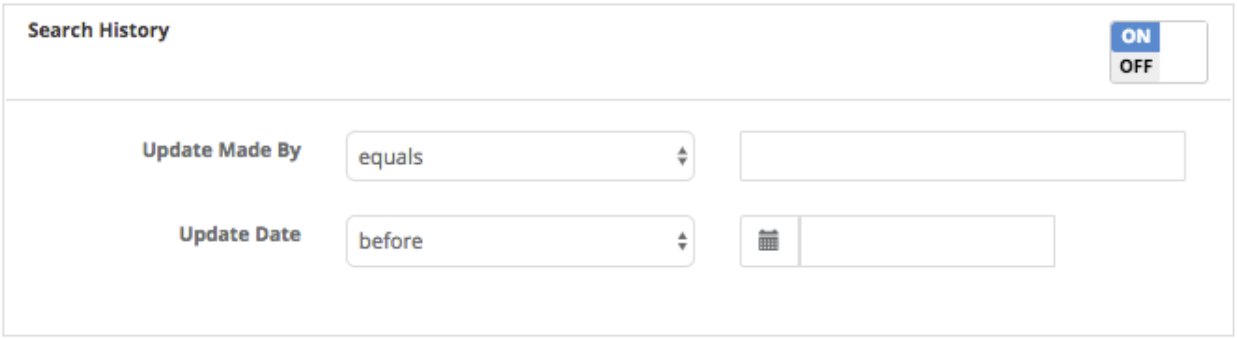
Is this case still active or not? Click anywhere in the Active field and choose ‘equals’ or ‘not equals’. Next, click anywhere in the box to the right of the Active field and select ‘true’ or ‘false’.

Tags
A searchable label any User can create that is attached to a Case or Item for the purpose of identification. Click anywhere in the Tags field and choose ‘equals’ or ‘not equals’. Next, click anywhere in the box to the right of the Tags field and select the Tags you would like to search.

Offices
Which Office location(s) does this Case pertain to? Click anywhere in the Offices field and choose ‘equals’ or ‘not equals’. Next, click anywhere in the box to the right of the Offices field and select your option(s) from the scrollable menu.

Saved Searches of Items
The first field is set to equals. In the second field, you may choose a previously Saved Search of Items you would like to couple with the search parameters you have currently chosen.

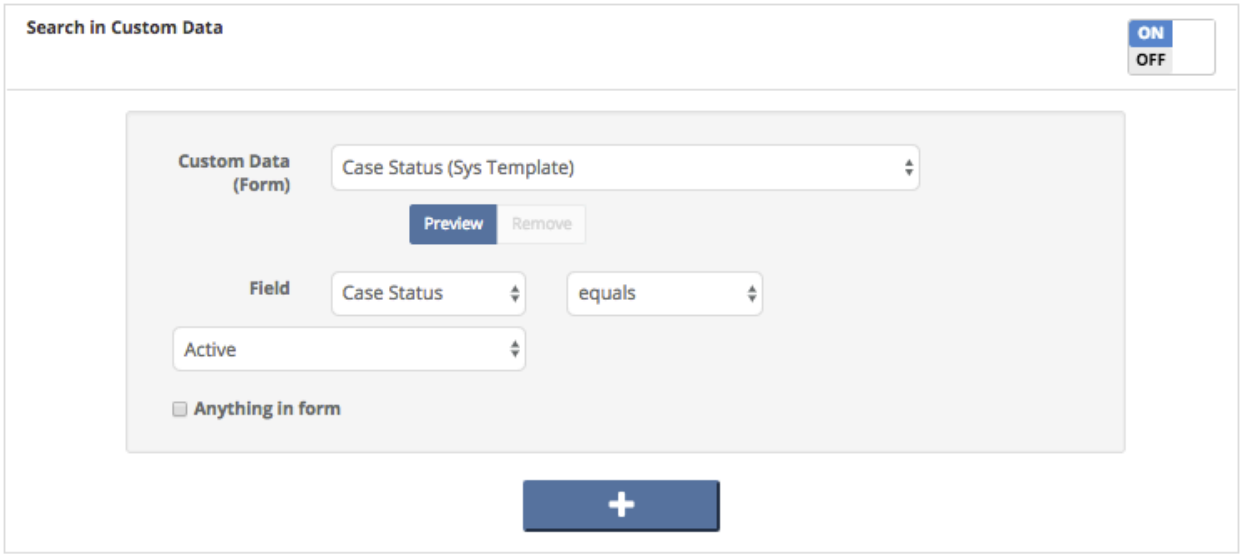
Search History \ Update Made By
When the Search History field is turned ‘on’, you may click anywhere in the Update Made By field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Update Made By field you can enter your parameters.



Search History \ Update Date
When the Search History field is turned ‘on’, you may click anywhere in the Update Date field to bring up a list of options to choose from. Next, in the box to the right of the Update Date field, there is a Calendar field where you can enter your parameters.

Search in Custom Data \ Form

When the Search in Custom Data field is turned ‘on’, after clicking the Plus sign at the bottom of the Search in Custom Data box, you may click anywhere in the Form field to bring up a list of options to choose from. You may also Preview the form by clicking the green Preview button.



Search in Custom Data \ Field

When the Search in Custom Data field is turned ‘on’, after clicking the Plus sign at the bottom of the Search in Custom Data box, you may click anywhere in Field to bring up a list of options to choose from. Next, to the right of the first Field box, you may choose ‘equals’ or ‘not equals’.

Search in Custom Data \ Anything in form (check box)

When the Search in Custom Data field is turned ‘on’, after clicking the Plus sign at the bottom of the Search in Custom Data box, you may click the Anything in form (check box) to select a search pertaining to anything in the form you have selected.

Buttons on the Search in Custom Data field

+

Choose the blue ‘plus’ button on the Search in Custom Data field to add additional forms you can select parameters for.

Buttons on the Case Search Page

Search

Once you have entered all of your parameters, click the Search button to search cases.

Clear

Click this button to reset all parameters.

Save

Click here to save a copy of the Search containing the parameters you’ve chosen.

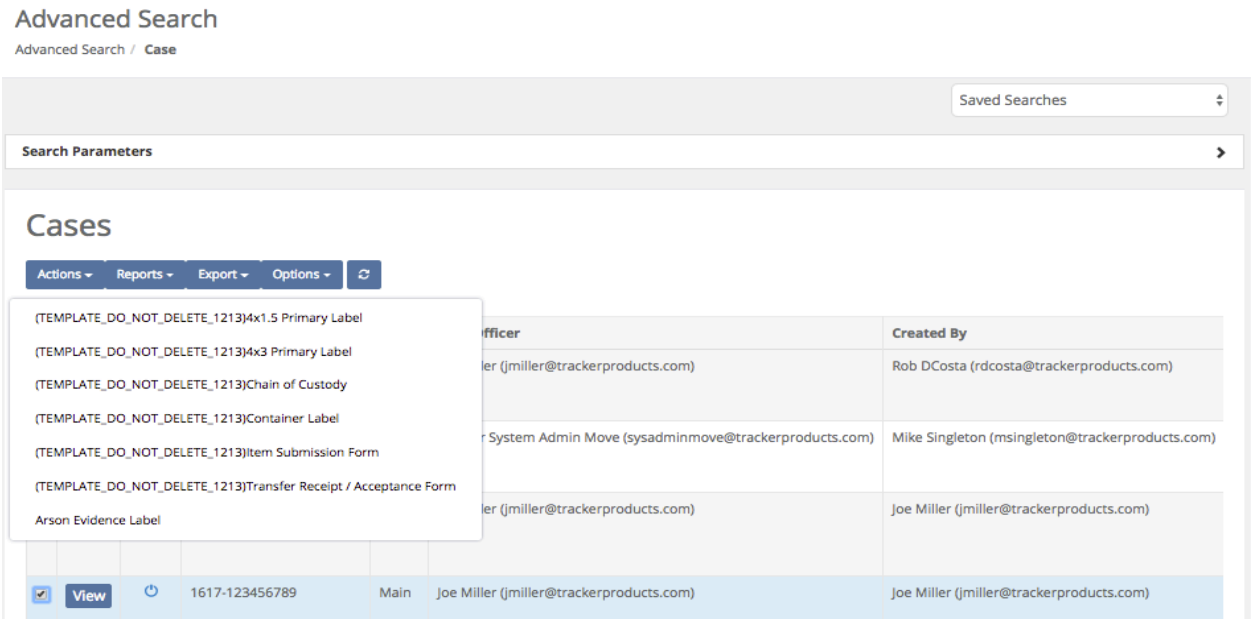
Cases found from a Search

After you've run a Search on a Case, a list of Cases will appear. Click on any box at the top of the list you would like to sort by. Simply click Case Officer for example and the list will be sorted by that. Click Case Officer again, and the list will be sorted in reverse order. You may also now **switch the header options**. For example, you want the Active column to be last. Simply drag Active to the last column spot and release the mouse. Active will now be the last column.

To view an individual Case, click the **View** box next to the Case you're interested in looking at to bring up that particular Case Number and information, otherwise, highlight the Case(s) you're interested in by clicking anywhere in their horizontal Case row and you may then choose from the **Actions**, **Reports**, **Export** or **Options** menus.

In the **Actions** menu, you can **Export** the list of items associated with the case you just highlighted by clicking **Export All Results**. The exports get deleted after 7 days. If you choose, you may also cancel the export from the **Actions** box on the next screen.

If you would like to run a **Report**, or **Print a Label** on the Case you just brought up, click the **Reports** box to bring up a list of Reports or Labels you can choose from.

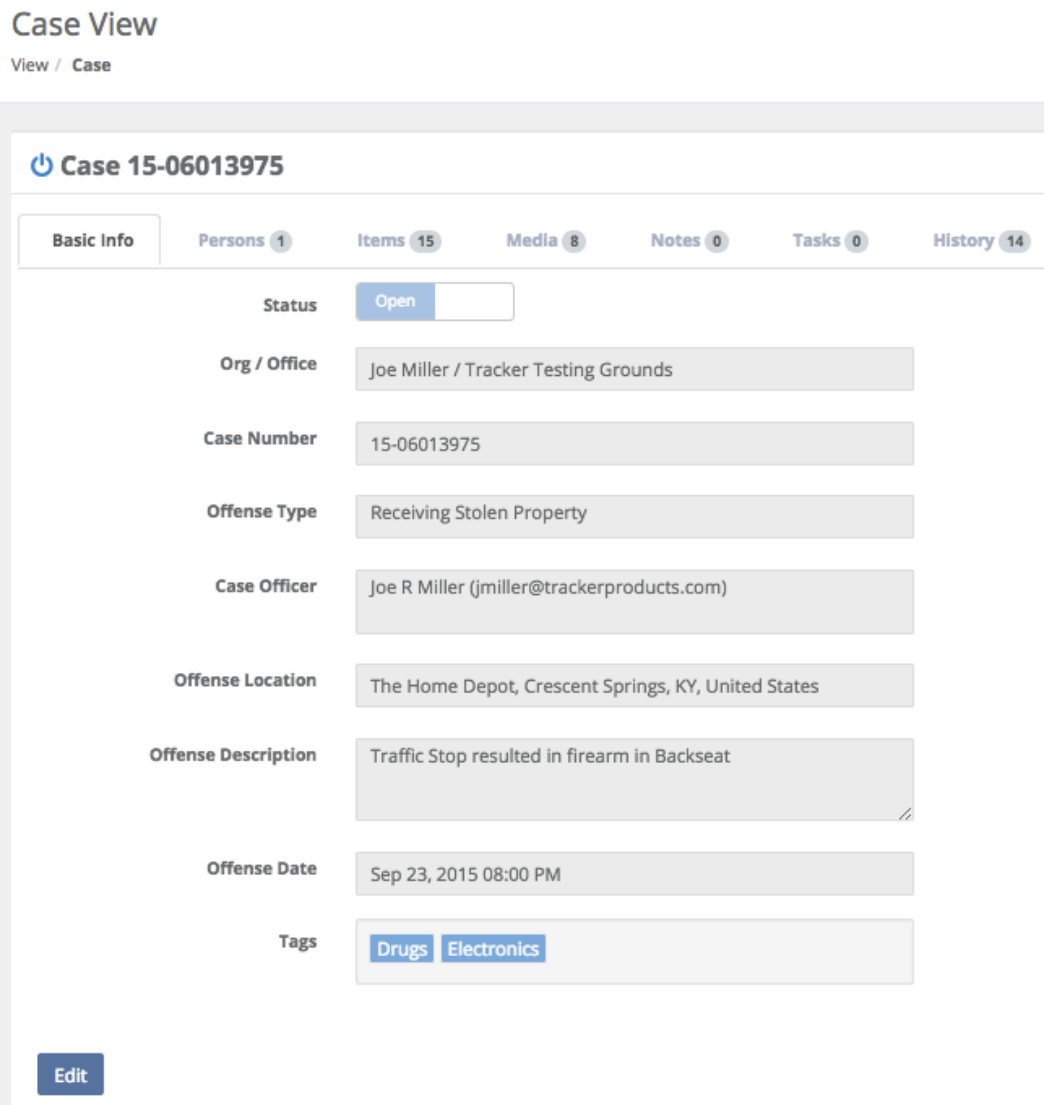


You can also click the **Export** box to export the information on any Case(s) you've selected to a comma separated value (.csv) file.

Click the **Options** box to display the drop down **Options** menu. From here, you can turn on/off which columns of information you wish to see displayed on your screen (or not displayed if there is an "**X**" beside them). If you don't want a column displayed, click on it's name and it will be removed (not permanently) from the list.

Search \ Case \ Basic Info Tab

After clicking view, the Case View screen will appear, showing the **Basic Info** tab.



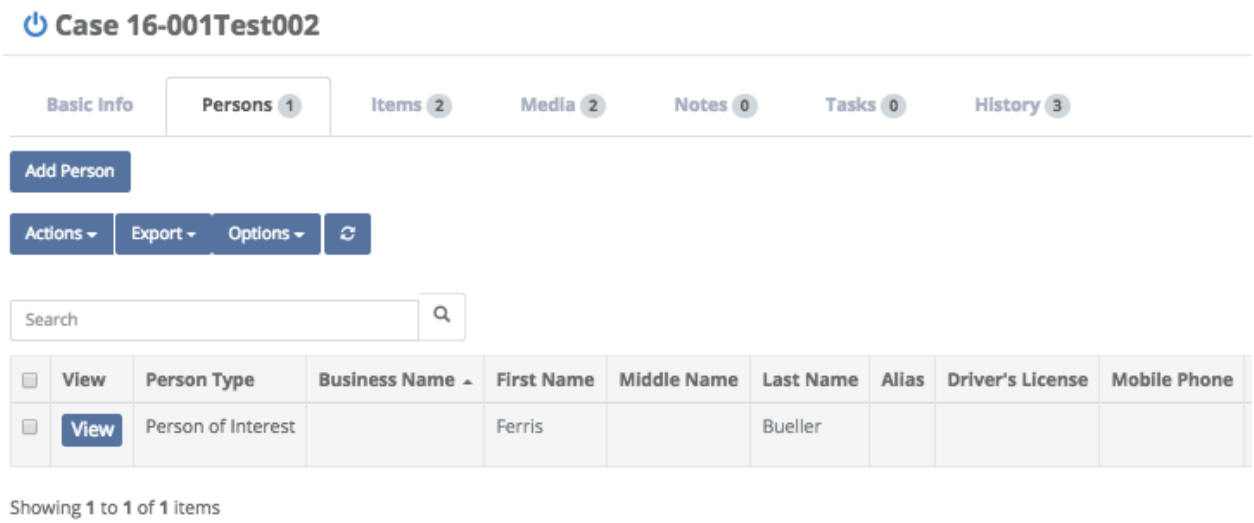
The **Basic Info** tab immediately under the Case number will show you basic information regarding the case. **Persons**, **Items, Media**, **Notes** and **History** (tabs) associated with the case will also be shown here.

The fields immediately under the tabs (such as **Case Number** and **Offense Type** etc.) have been filled in by the person who submitted the case.

Clicking the **Edit** box will allow you to edit and change any information shown on the **Case View** screen, depending on your permission level (except the **Org / Office**). For example, if a user inadvertently enters an incorrect **Case Number** or **Offense Type**, you may be allowed to change it by clicking **Edit**, making those changes, then clicking **Save**.

Search \ Case \ Persons Tab

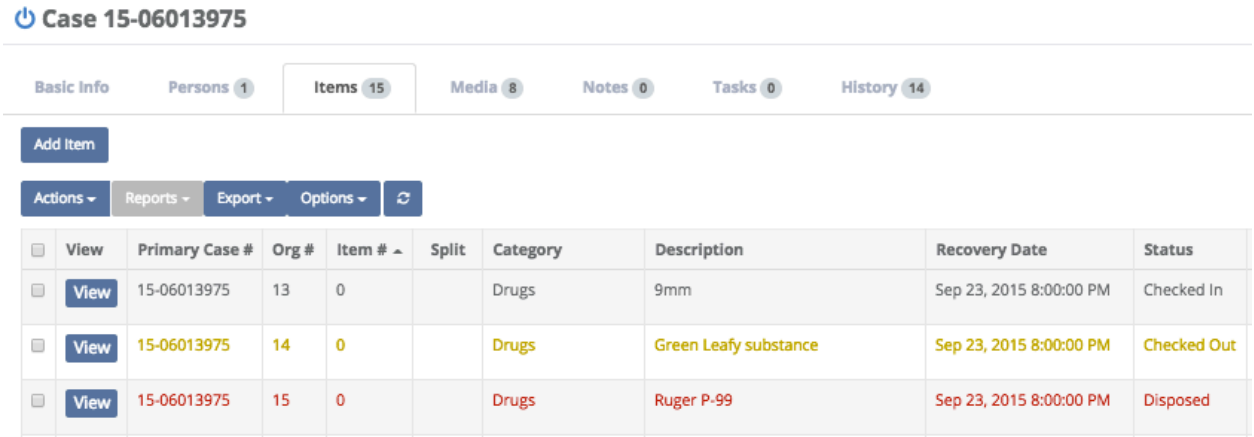
In the Case View Section, under the **Persons** tab, you will see Persons associated with the particular case you have brought up if there are any. From here you can **Add (another) Person** to this Case by clicking **Add Person** (the Add Person screen will then come up and be populated with the Case Number). Or, from the **Actions** menu, you can **Remove Selected Person(s)** from this case.



Search \ Case \ Items Tab

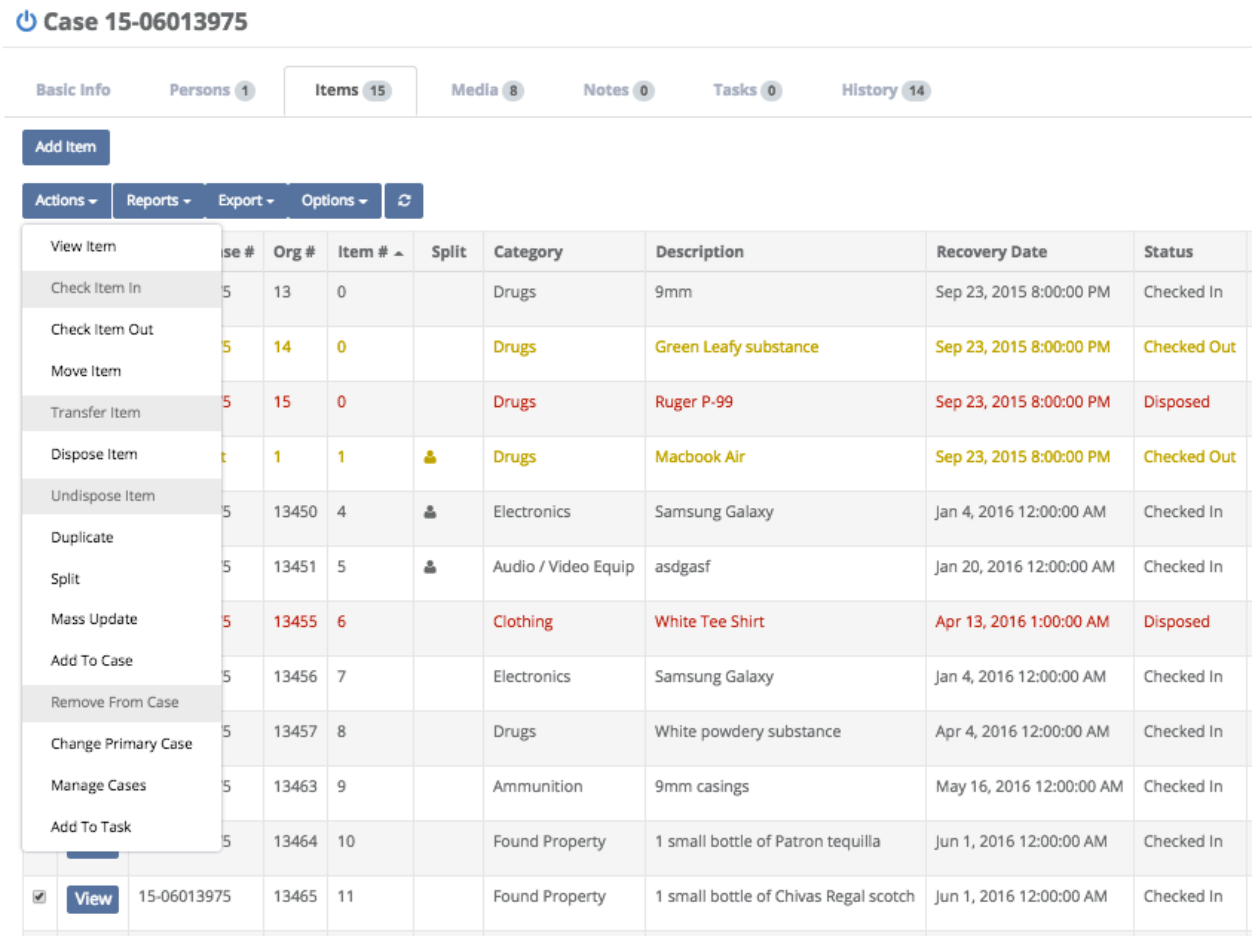
In the **Case View** Section, under the **Items** tab, you will see Items (with their information) associated with the particular case you have brought up. You may **Add/Create Items** for the case you brought up by clicking on the **Add Item** box then filling in any **Required** information (as was discussed in the previous **Creating an Item** section).

All item lists now show color depending on the status of the item.
Black = Checked In / Dark Yellow = Checked Out / Red = Disposed



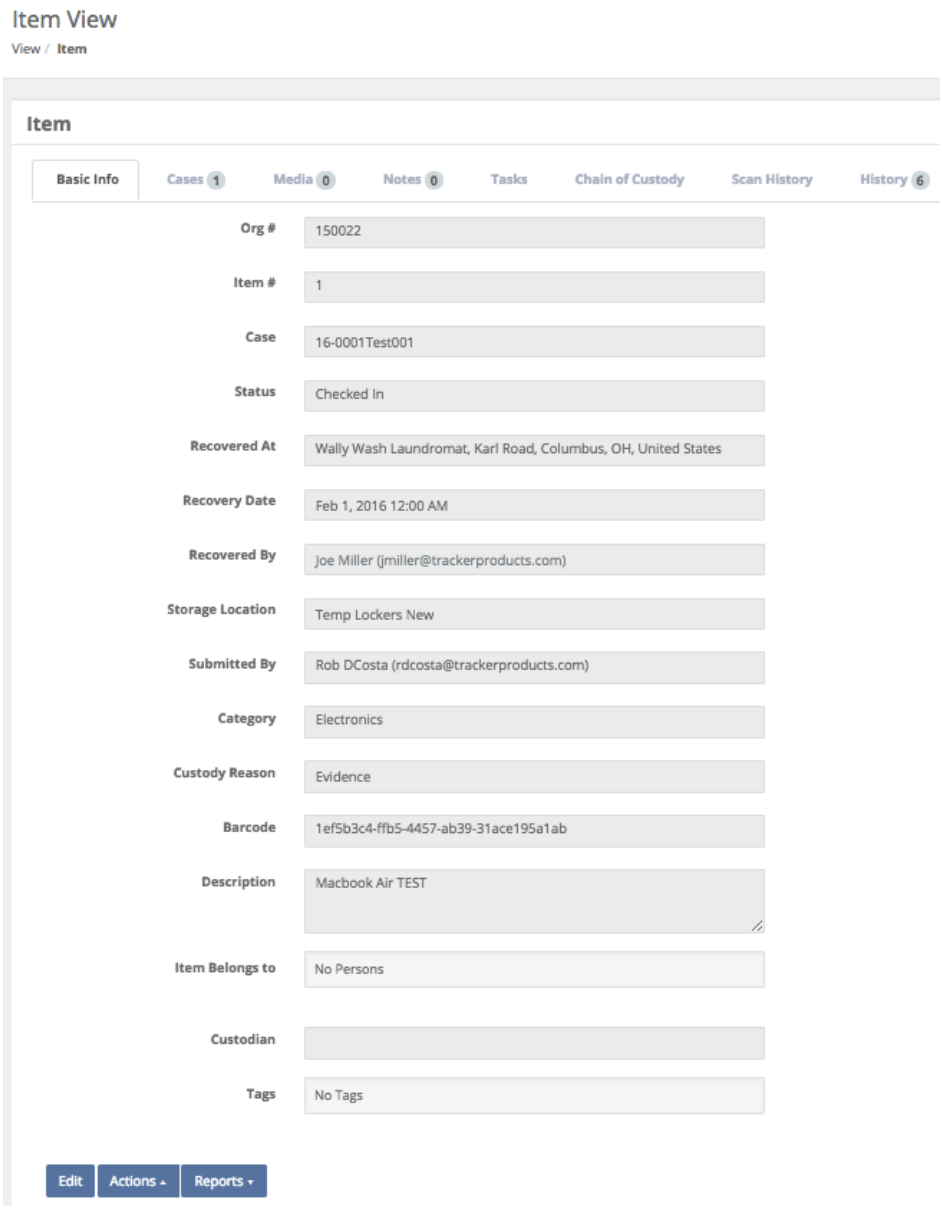
Search \ Case \ Items Tab \ Actions Box

You may immediately view an **Item** by clicking the **View** box. You may also check the box to the left of **View**, then click the **Actions** box, which will bring up a list of options to choose from.



Viewing an Item

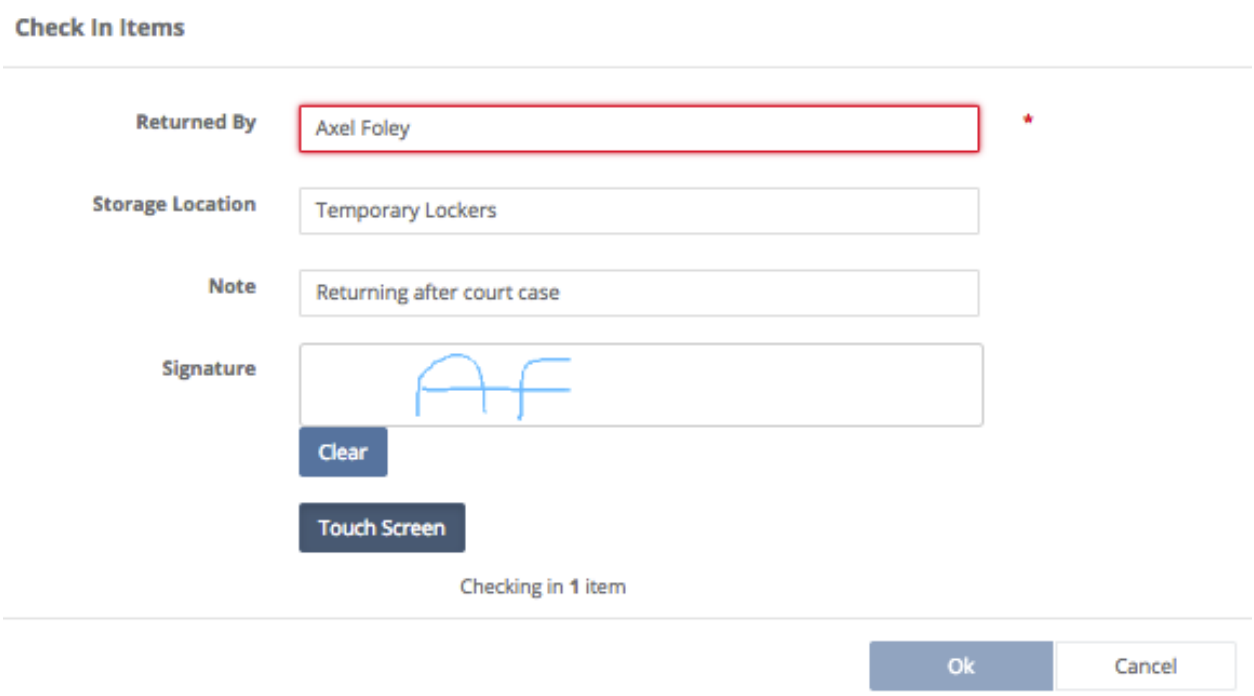
1. Click any one item and choose **View Item** from the **Actions** menu to view the item you've chosen. From here, you may **Edit** the item by clicking the **Edit** box. You may also click the **Actions** box and choose a selection (we will go into further detail on these selections in an upcoming section). You can also **Print a Label**, or run a report on the Item by clicking the **Reports** box and making a selection.



Clicking the **Edit** box will allow you to edit **ONLY** certain fields relating to the **Item**, depending on your permission level. For example, you may be allowed to edit **Recovered At**, **Recovery Date**, **Recovered By**, **Category**, **Custody Reason**, **Serial Number**, **Model**, **Make**, **Description, Item Belongs to**, and **Tags**.

Checking an Item In

2. Choose any item(s) you wish to **Check In** by selecting your item(s), and choosing **Check Item(s) In** from the **Actions** menu (make sure the item isn't currently checked in by looking under Status). This will bring up the Check In Items screen. Perhaps this item is being returned from a court case, for example. *To Check Items in from another Office or Org, see the Scan section.*



Fields on the Check In Items Screen

Returned By

Type the name of the Person who returned the Item. This field will remain red unless the person returning the item has a valid email address in the system. This is a **Required** field.

Location

This is where the Item will be placed. This may be a Temporary Locker, a box on a shelf in your evidence room, or a safe, for example. This is a **Required** field.

Note

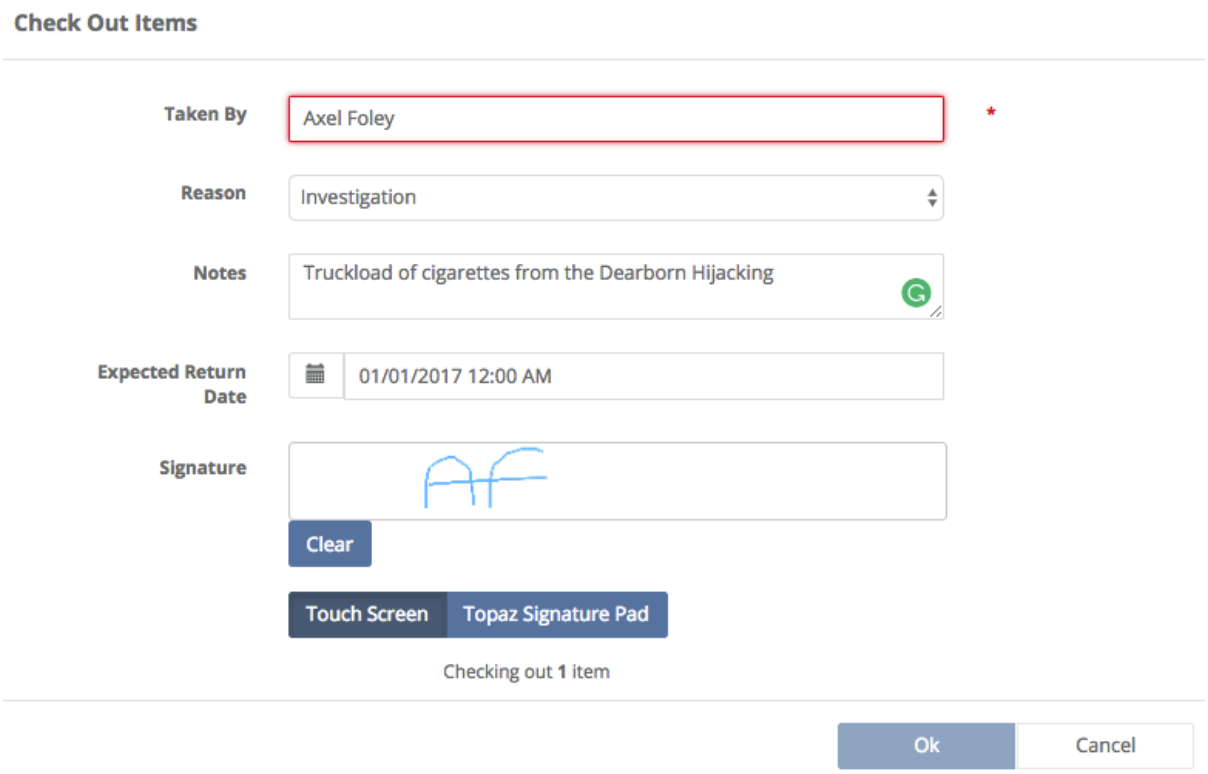
You can type a note in this field.

Signature

Anyone checking in an item should provide a signature via Touch Screen, Topaz Signature Pad (if either of those options are enabled by your administrator), or simply signing via mouse to maintain the Chain of Custody. This is a **Required** field.

Checking an Item Out

3. Choose any item(s) you wish to **Check Out** by selecting your item(s), and choosing **Check Item(s) Out** from the **Actions** menu (make sure the item isn't currently checked out by looking under Status). The Check Out Items screen will then appear.



Fields on the Check Out Items Screen

Taken By

Type the name of the Person who is taking the Item. This field will remain red unless the person returning the item has a valid email address in the system. This is a **Required** field.

Reason

What is the reason for taking the Item? This is a **Required** field.

Notes

You can type notes in this field.

Expected Return Date

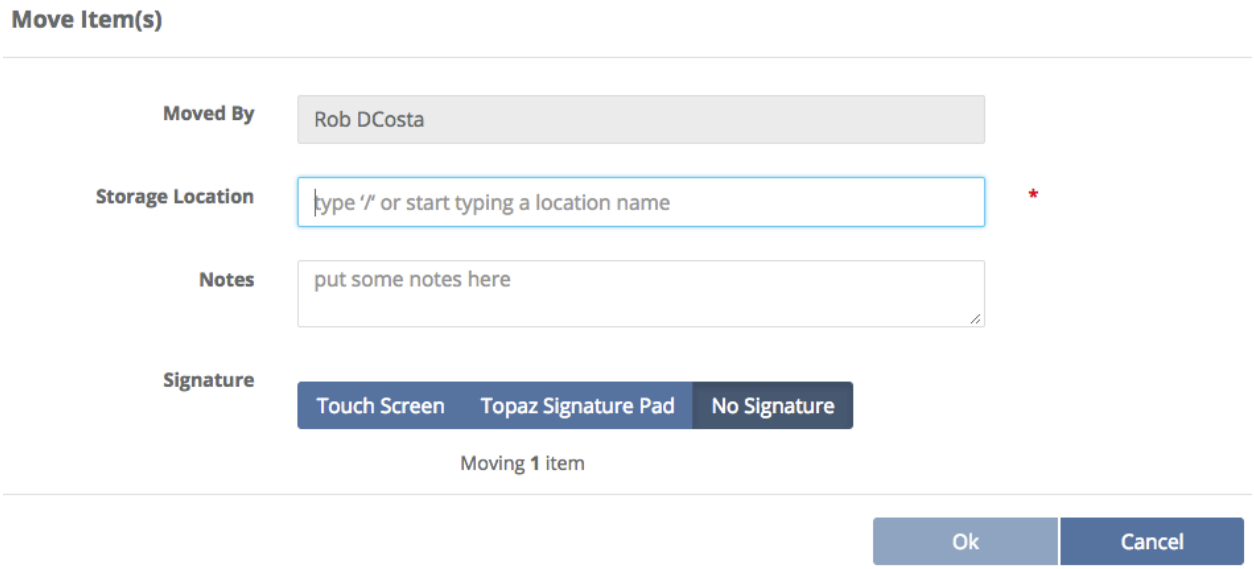
Enter a date and time you expect the Item to be returned by.

Signature

When checking out an item, you must sign your name in this field via Touch Screen, Topaz Signature Pad (if either of those options are enabled by your administrator), or simply signing via mouse to maintain the Chain of Custody. This is a **Required** field.

Moving an Item

4. You may also choose from the **Actions** menu, **Move Item(s).** This will bring up the Move Item screen. You can now move items that are 'Checked In' from one Location to another such as from a temporary locker to a safe, for example. Simply type a **Required** Location the Item will be moving to, sign your name (also **Required**) and click Ok.



Fields on the Move Item(s) Screen

Moved By

Shows the name of the person currently logged into the software who is moving the Item.

Location

This is where the Item will be moved to. This may be a Temporary Locker, a box on a shelf in your evidence room, or a safe, for example. This is a **Required** field.

Notes

You can type notes in this field.

Signature

When moving an item, you must sign your name in this field (via Touch Screen, Topaz Signature Pad (if either of those options are enabled by your administrator), or simply signing via mouse to maintain the Chain of Custody. This is a **Required** field.

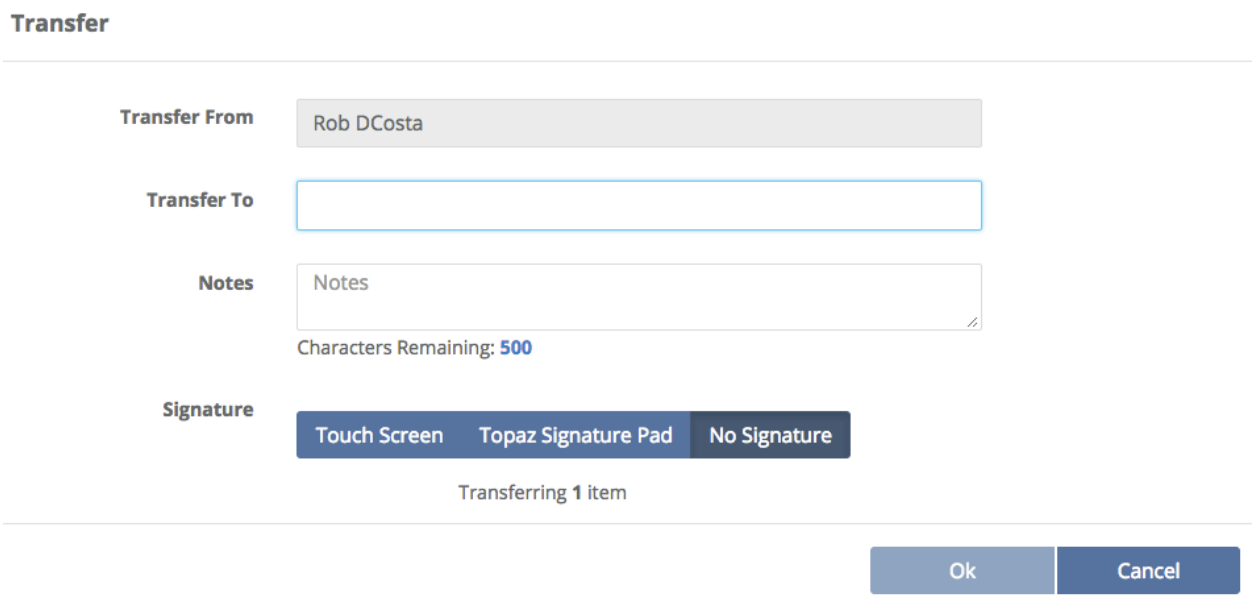
Moving an Item from one Office or Org. to another

If you are moving evidence to another Office or Org within SAFE, simply follow these steps to complete the transaction.

1. Check out all items that are being transferred from the Office they currently reside in
2. Switch the current Office to the Office you would like the Items transferred to
3. Go to the Scan page
4. Scan all items that are being checked in (Choose Office for Inter-Org moves, or System if Checking the Item in from a different Org.)
5. Complete the check in. This action will now move these items from the originating Office / Org into your current Office / Org.

Transferring Items

5. ***The purpose of Transferring Items (to a Person OR User) is to Check Out an Item that is ALREADY Checked Out***. For example, you can **Check Out** an **Item** to an Officer who then **Transfers** that **Item** to a lab for testing. When going through the Transfer process, the Officer can document notes regarding the **Transfer**, and obtain a signature from the lab via a cell phone or tablet with internet connectivity. To **Transfer** an **Item(s)** to another Organization that uses SAFE (for example), first make sure that Item has been '**Checked Out**', next highlight the **Item(s)** you would like to **Transfer** and choose **Transfer Item(s)** from the **Actions** menu. The **Transfer** screen will then appear.



Fields on the Transfer Screen

Transfer From

This is the person currently logged into the software who is transferring the Item.

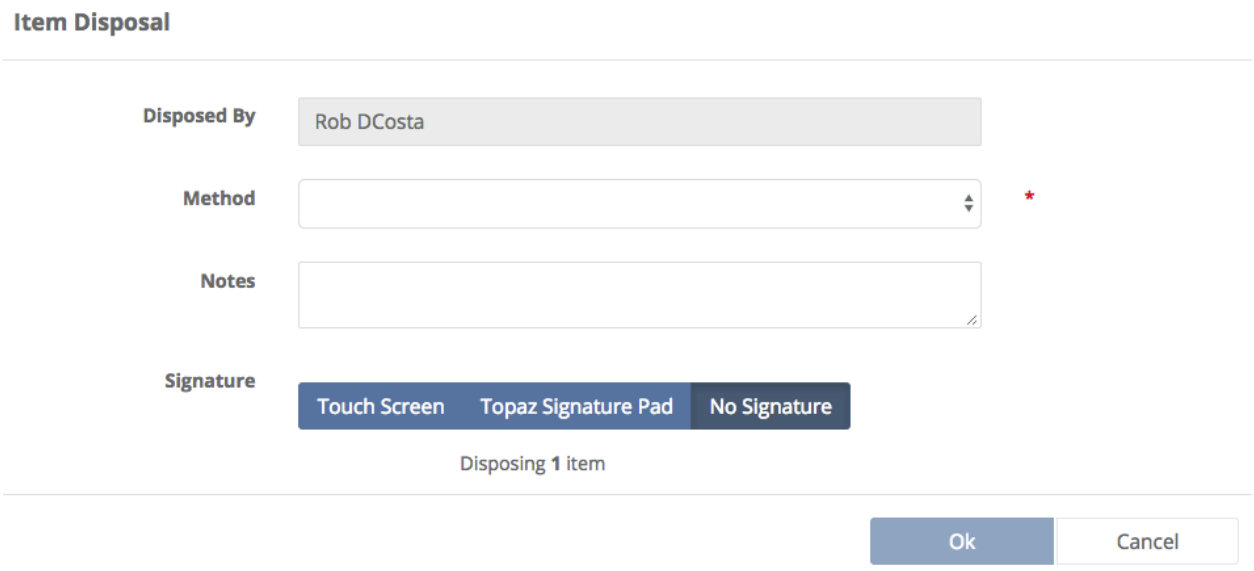
Transfer To
Type the name of the Organization you are transferring the Item to. This is a **Required** field.

Notes
You can type notes in this field.

Signature
Anyone transferring an item must provide a signature (via Touch Screen, Topaz Signature Pad (if either of those options are enabled by your administrator), or simply signing via mouse to maintain the Chain of Custody. This is a **Required** field.

Disposition of Items

6. If you wish to Dispose of an Item(s), highlight the Item(s), then choose **Dispose Item(s)** from the **Actions** menu. This will take you to the **Item Disposal** screen.



Fields on the Item Disposal Screen

Disposed By
This is the person currently logged into the software who is disposing the Item.

Method
This will state how the Item was disposed of. Click anywhere in the Method field to bring up a list of choices. This is a **Required** field.

Notes
You can type notes in this field.

Signature

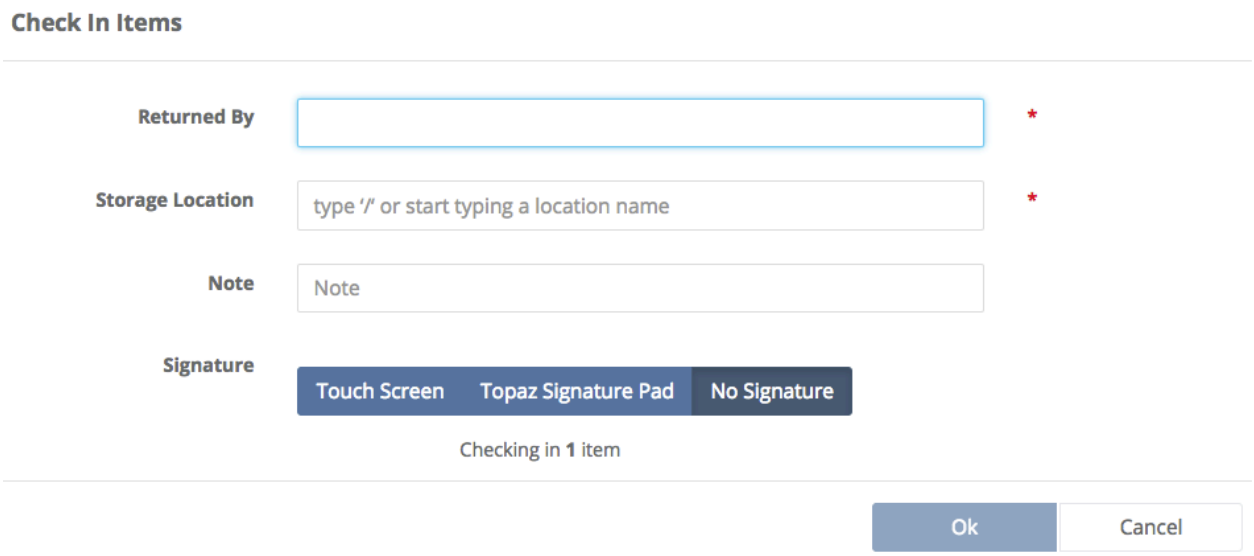
Anyone disposing an item must provide a signature (via Touch Screen, Topaz Signature Pad (if either of those options are enabled by your administrator), or simply signing via mouse to maintain the Chain of Custody. This is a **Required** field.

Undispose an Item

7. As an Org Admin, why **Undispose**? Because when you **Undispose** an **Item**, you are checking the Item back in, and a **Chain of Custody** entry will be added to that Item.

For example, if you accidentally disposed a credit card that had fingerprints on it, when it was actually on a shelf in the furthest reaches of your evidence room. Or, you accidentally disposed a hard drive that (unbeknownst to you) someone had sent to the lab for analysis. These are just a few of the possible reasons to use the **Undispose** function.

If you wish to **Undispose** an Item(s), highlight the Item(s), then choose **Undispose Item(s)** from the **Actions** menu. This will take you to the **Check In Items** screen.



Duplicating Items

8. The **Duplicate** feature found in the **Actions** menu, can streamline the Item entry process. Users can duplicate previously created items to make new items. You can also edit newly created duplicated items before submitting them. This option removes the need to retype the same information over and over into the system.

To Duplicate an Item, highlight one item you wish to copy, then choose **Duplicate** from the **Actions** menu. This will take you to the **Add Item** screen where the software has made a duplicate of the information from this Item, but provided the duplicate with a unique GUID (Globally Unique Identifier which is a unique 128-bit integer number). The GUID is/corresponds to the barcode ID for an Item.

(Note: A common mistake in the software is creating too many items when duplicating existing items. Emphasize to your users they need to pay close attention when duplicating items to avoid creating too many new items.)

Splitting Items

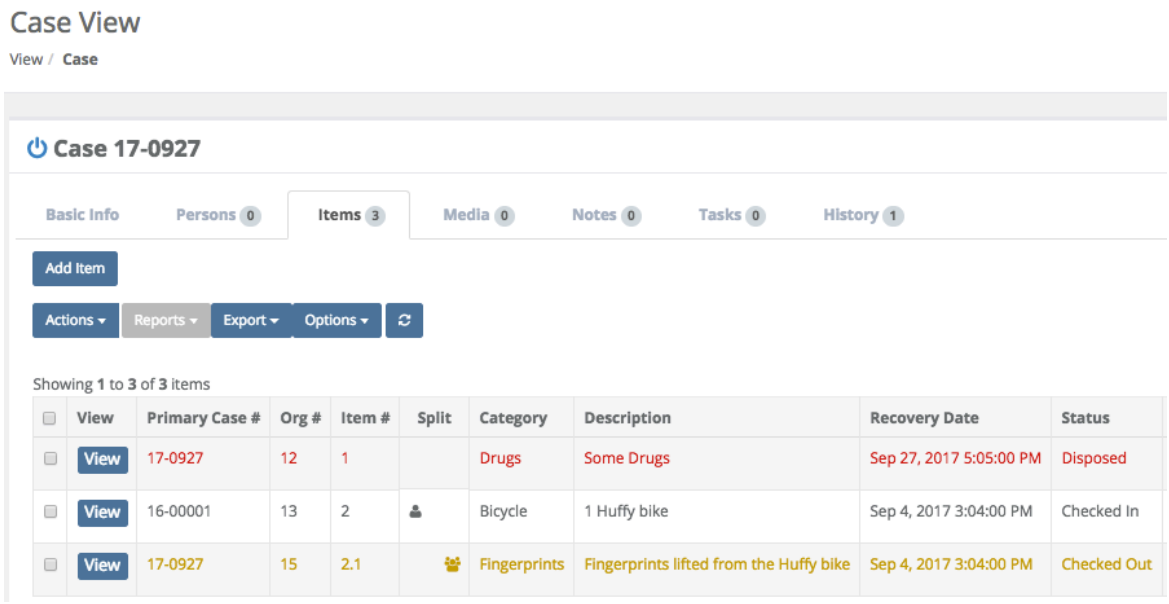
9. Why Split Items? Say you have a backpack full of various items, some of which need to be sent to the lab for analysis. Or, you've taken an image of a computer hard drive and would like to maintain the Chain of Custody relating to the Original Item. To show, maintain, and preserve the Chain of Custody relating to the Original Item, you can Split the Item (multiple times if needed). Splitting an Item will show that "parent/child" relationship. The Split creates a new Item and indicates that it came from the parent.

If you wish to **Split** an Item(s), highlight the Item(s), then choose **Split** from the **Actions** menu. This will take you to the Add Item page where the case number and category have been selected. Clicking Next will take you to the Add Item \ Basic Info page. Fill in as much information as you can, then click **Save & <Choose an Option>.**

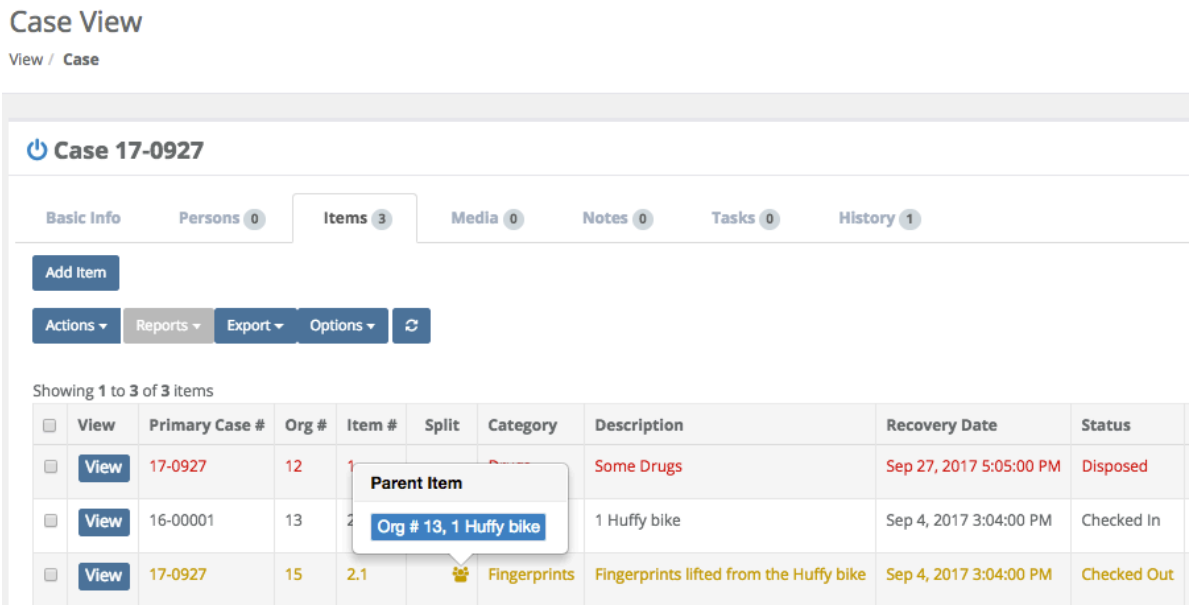
If you clicked **Save & View Item**, you will now be on the **Item View** page. Click the **Cases Tab**, then click **View** (to **View the Case** with the **Item** you just **Split**). Next, on the **Case View** screen, click the **Items Tab**. You will now see the **Item** you just **Split**.

In the **Split Column**, the single/parent icon denotes the **Original Item**, while the multiple/child icon denotes the **Split Item**. If you have one Split, only 1 parent and 1 child icon will appear. In the example below, a Split Item (Fingerprints lifted from the Huffy bike) was Split from the the '1 Huffy bike' and is shown by the multiple/child icon . Another indicator that an Item was Split is shown in the Item # column, as the Split Item now shows Item # 2.1

When splitting items, it can be useful to include (in the description field) what the item was split from.

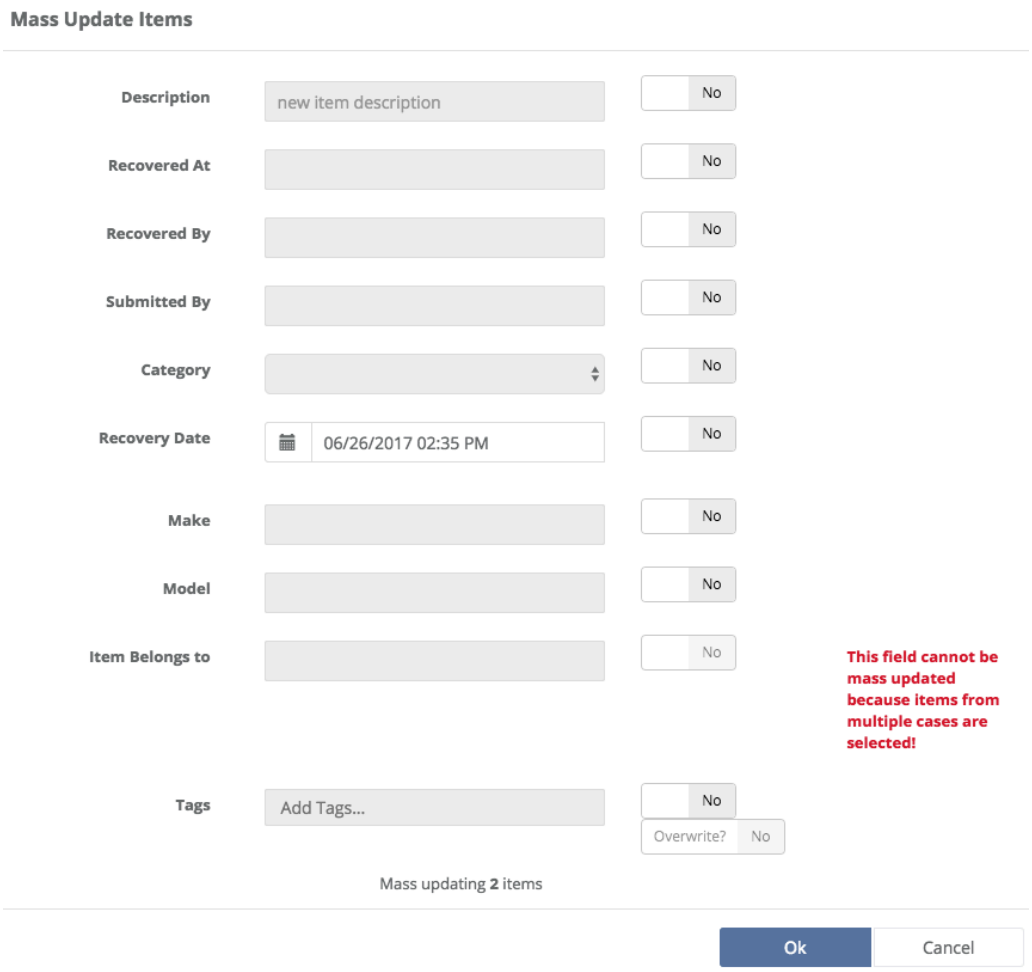


Clicking either the parent or the child item Icon will reveal the Org # and a partial description of either the child or parent Items.



Mass Update on Multiple Items

10. To do a **Mass Update** on multiple items from the **Same Case**, choose more than 1 item and select **Mass Update** from the **Actions** menu. This will bring up the **Mass Update Items** screen. After you finish choosing your options from the Mass Update Items selections, click Ok.



Fields on the Mass Update Items Screen

Description

If you'd like a new item description for the items you've selected, type one here and select Yes.

Recovered At

To update the location the items were recovered at, type one here and select Yes.

Recovered By

To update who the item was Recovered By, type one here and select Yes.

Submitted By

To update who Submitted the items, type one here and select Yes.

Category
To update the category these items belong to, Select Yes first. Next, click in the category box and a selectable menu will appear.

Recovery Date
To update the date and time these items were recovered on, click the calendar icon to choose a date and time, or enter one manually and select Yes.

Make
To update the Make of these items, type one here and select Yes.

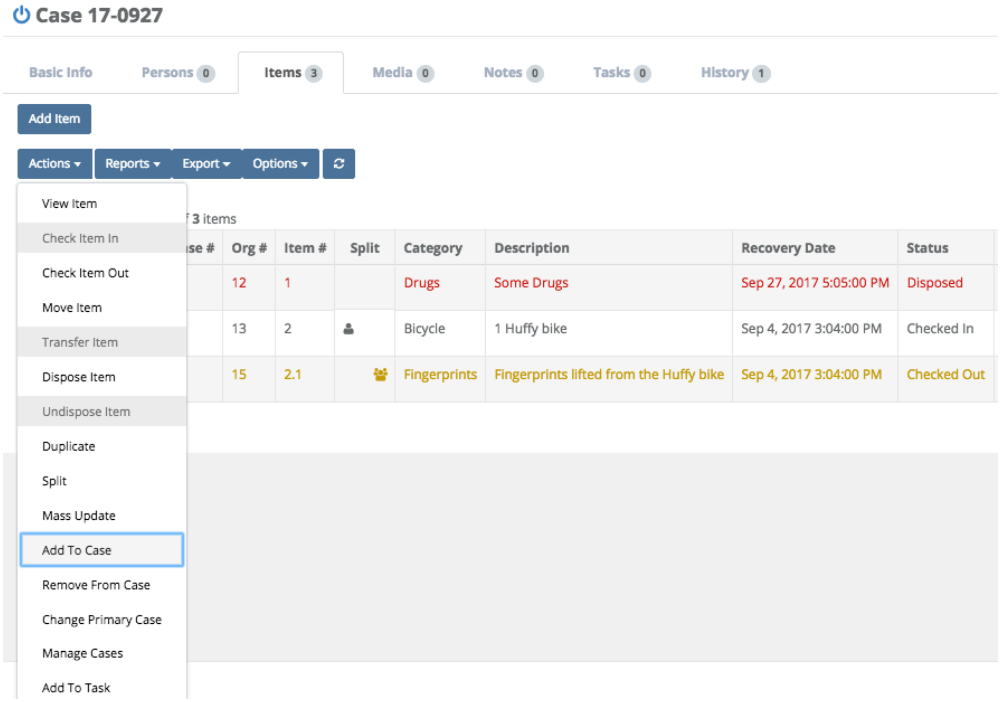
Model
To update the Model of these items, type one here and select Yes.

Item Belongs To
To update who this Item Belongs To, type one here and select Yes.

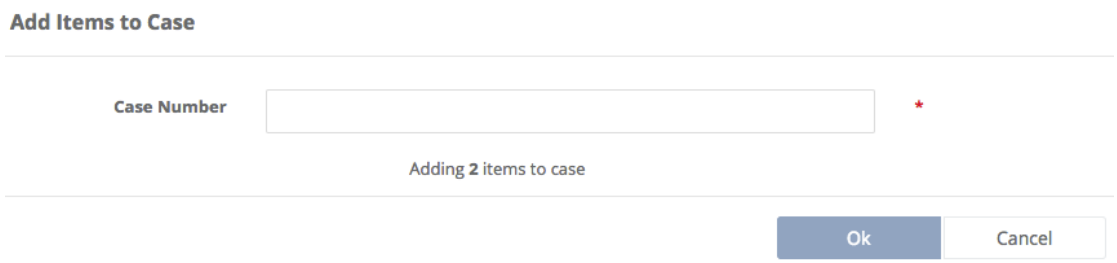
Tags
The item mass update option allows you to mass apply or overwrite Tags to selected items. The default value is to apply the new tags to selected items. You must select Overwrite to replace all tags.

Adding an Item to a Case

11. Click any number of item(s) and Choose **Add to Case** from the **Actions** menu to add the item(s) you've chosen to a particular case.

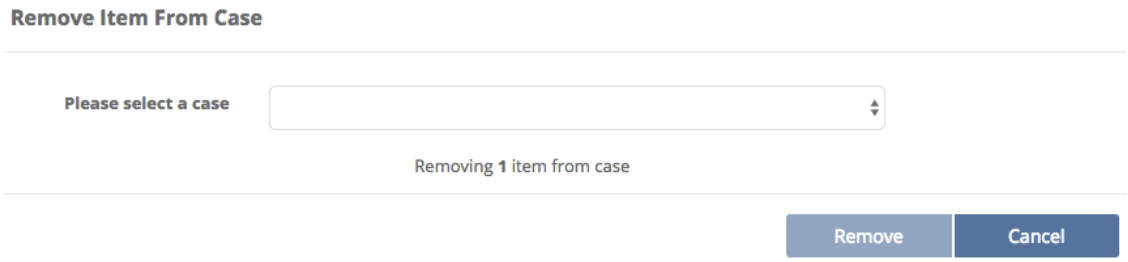


When the **Add Items to Case** screen is shown, enter a **Required** **Case Number** and click Ok.



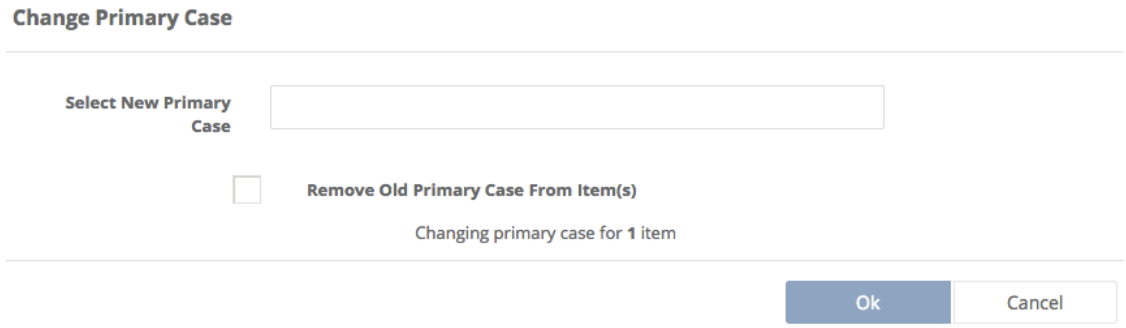
Removing an Item From a Case

12. Select an Item which has been 'Checked Out', and Choose **Remove from Case** from the **Actions** menu to remove the item you've chosen from a particular case. When the Remove from Case screen is shown, select a case (**Required**) by clicking in the 'Please select a case' field, then click **Remove**.



Changing the Primary Case

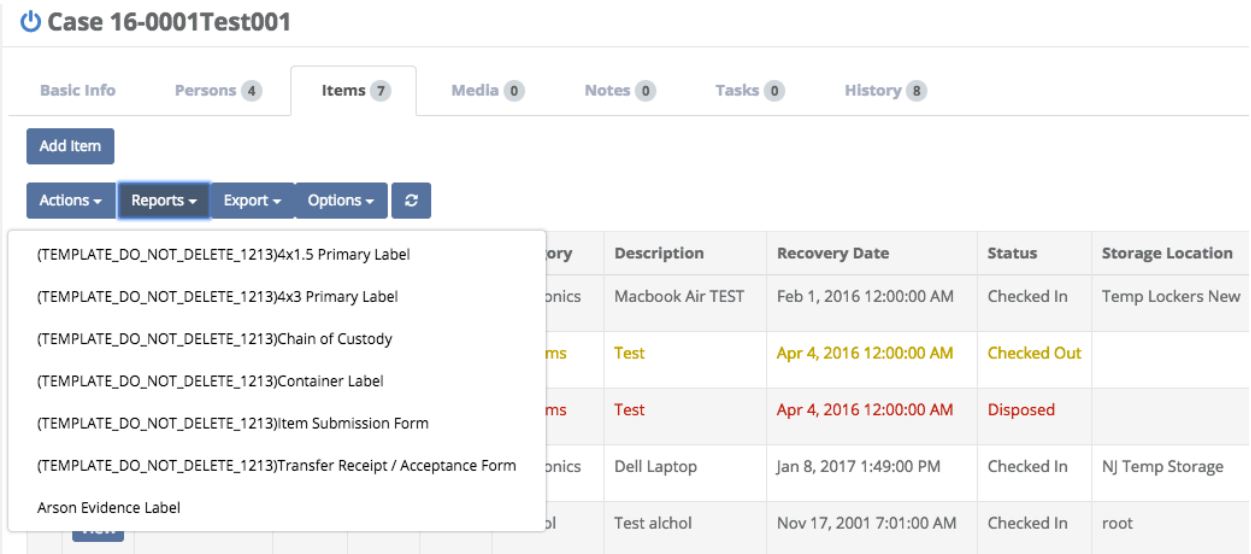
13. The **Change Primary Case** feature found in the **Actions** menu, will allow you to select a new Primary Case related to the Item(s) you have selected.



Note: When changing an Item's Primary Case # (moving the Item from one Case to another), or if an Item is in more than one Case, to preserve the Chain of Custody, DUPLICATE Item #s may be created!
For these reasons alone, we suggest using the Org # (on labels for example), because the Org # will never have a duplicate!

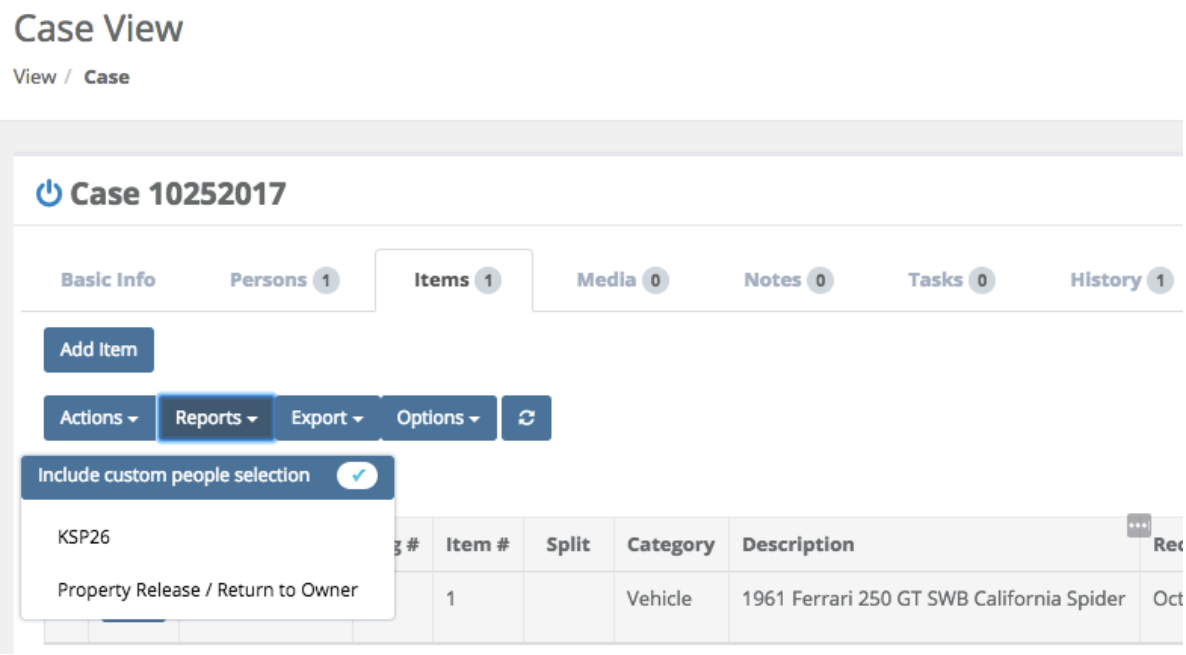
Search \ Case \ Items Tab \ Reports Box

In the Case View Section, under the **Items** tab, you can also click the Reports box to run a report on any item(s) you've selected.

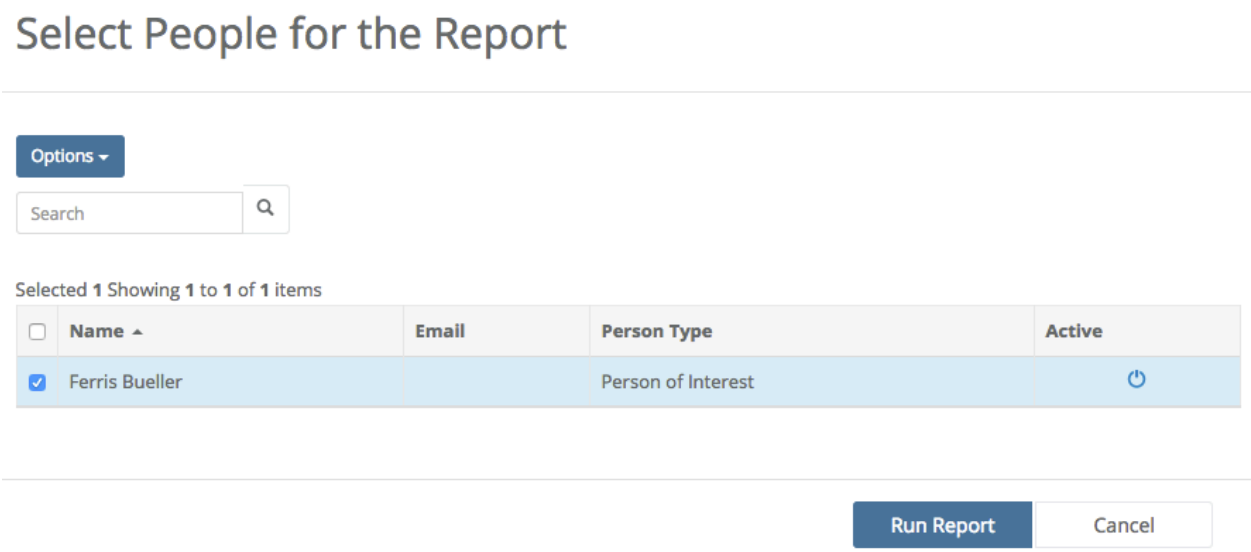


Search \ Case \ Items Tab \ Reports Box \ Persons

If you would like to run a Report showing specific Persons, first select the Items you're interested in. Next, check the **Include Custom People Selection** and finally choose the Report you would like to run.



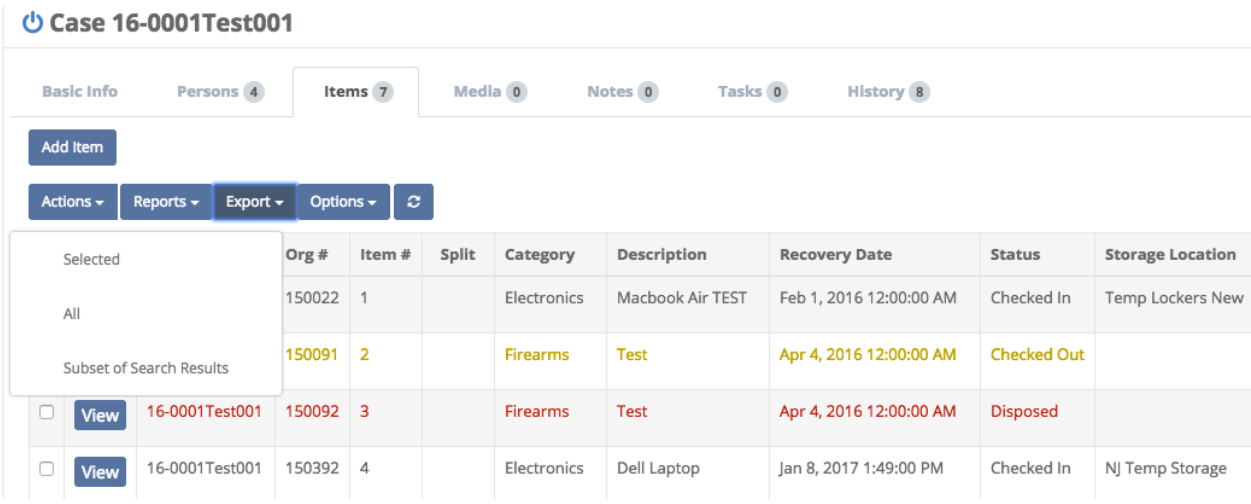
You may now select People for the Report and then run the Report.



Depending on how your Administrator has set up your report, you may see the Person you've selected, their Address, Person Type etc.

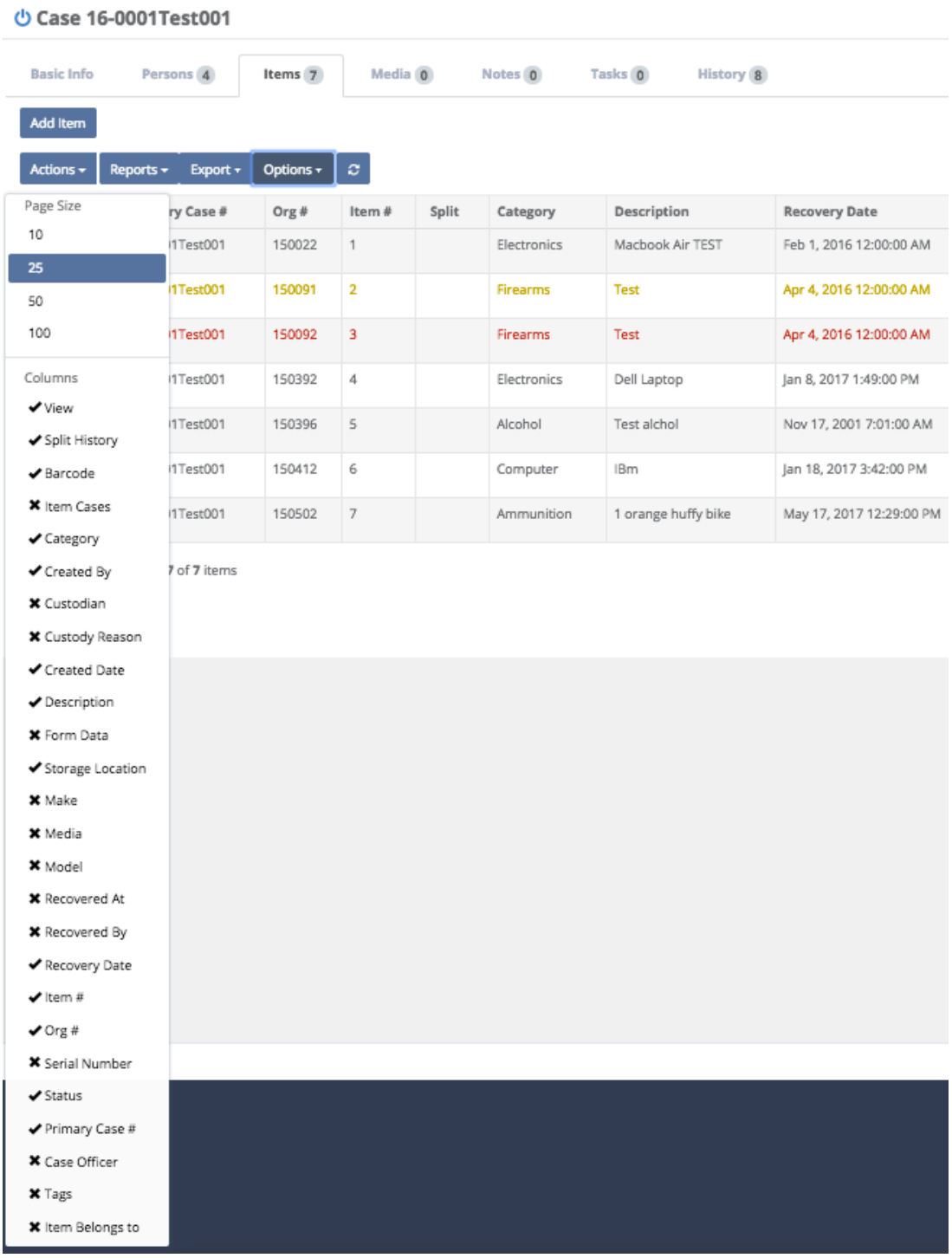
Search \ Case \ Items Tab \ Export Box

In the Case View Section, under the **Items** tab, you can also click the Export box to export the information on any item(s) you've selected by selecting **Selected, All, or a Subset of the Search Results** to a .csv file.



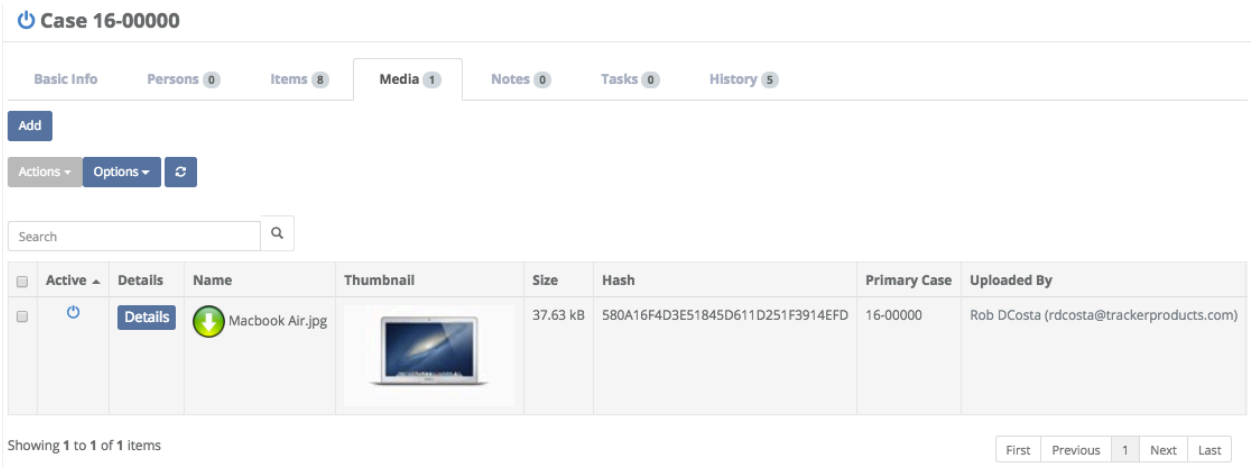
Search \ Case \ Items Tab \ Options Box

Click the **Options** box to display the drop down **Options** menu. From here, you can turn on/off which columns of information you wish to see displayed on your screen (or not displayed if there is an "**X**" beside them). If you don't want a column displayed, click on it's name and it will be removed (not permanently) from the list.



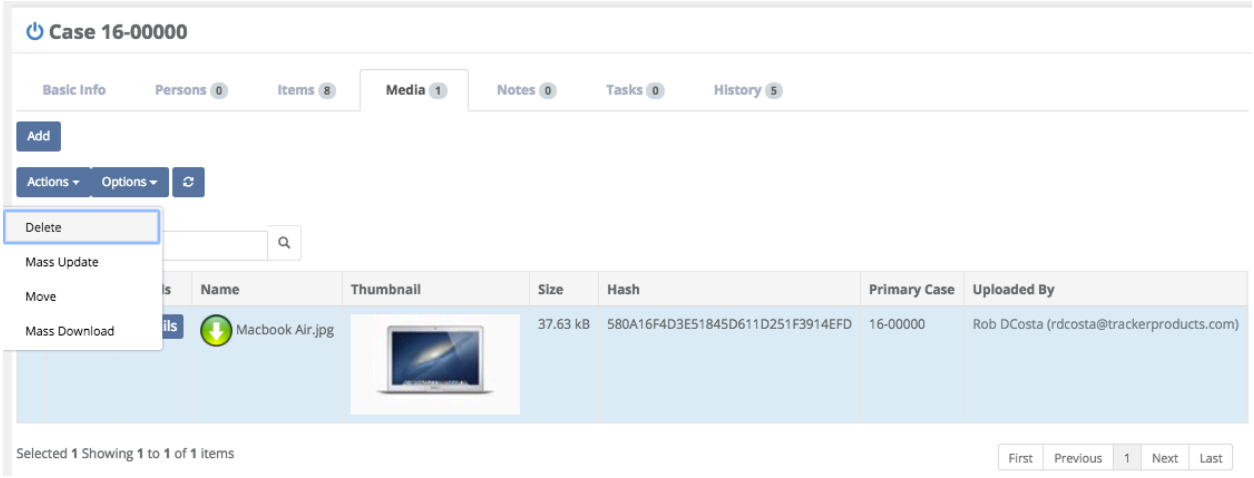
Search \ Case \ Media Tab

In the Case View Section, under the **Media** tab, you will see **Media** associated with the particular **Case** you have brought up, if there is any. If there is no **Media** associated with the **Case**, you have the option of Uploading Media to the **Case** by clicking the **Add** box. Next, click the **Upload Files** box, and choose or Drag and Drop your files into the marked box.



Clicking the **Thumbnail** of the **Media** allows you to see the image associated with it.
If you click the checkbox to the far left of any **Media**, and you have the appropriate level of permissions, you may then click on the **Actions** box, where you will be given the option to **Delete** the **Media** associated with this particular case.

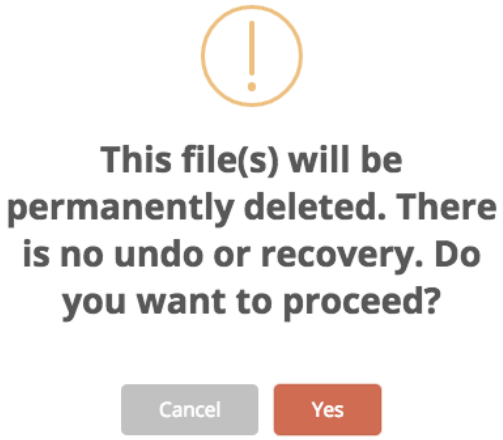
*Rarely do you ever want to 'delete' anything from the system. However, deleting an actual media payload file may eventually become necessary as you don't want to continue to take up server hard drive space especially with larger files. You may want to do this if you reach your storage limit and no longer need **Media** associated with closed Cases.*



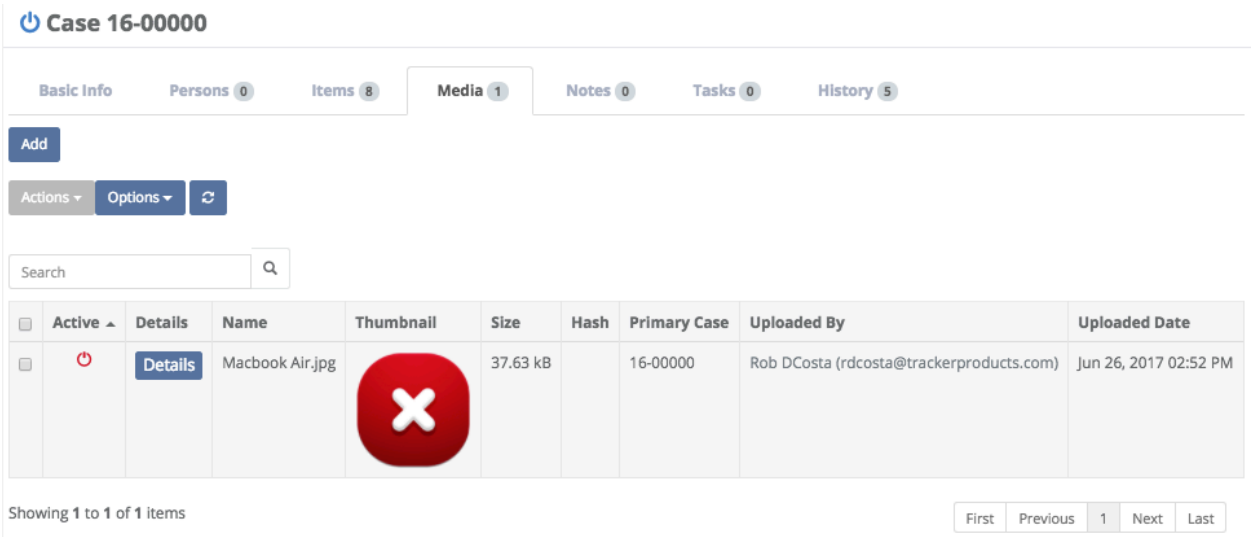
All files listed in the Case or Item 'Media' section are now able to be deleted. With the proper permissions you can select the files that you want to delete and click Actions > Delete Media. This action will only delete the actual media payload file and thumbnail file. All other meta data information including records of who deleted the file will be preserved.

Note: Deleting files will prompt a confirm message which notifies the User that file deletes cannot be recovered! This is for real, the actual payload file is not recoverable if deleted!
Anyone with the ability to Update Media (Settings > Security) is able to delete the media payload and thumbnail file.

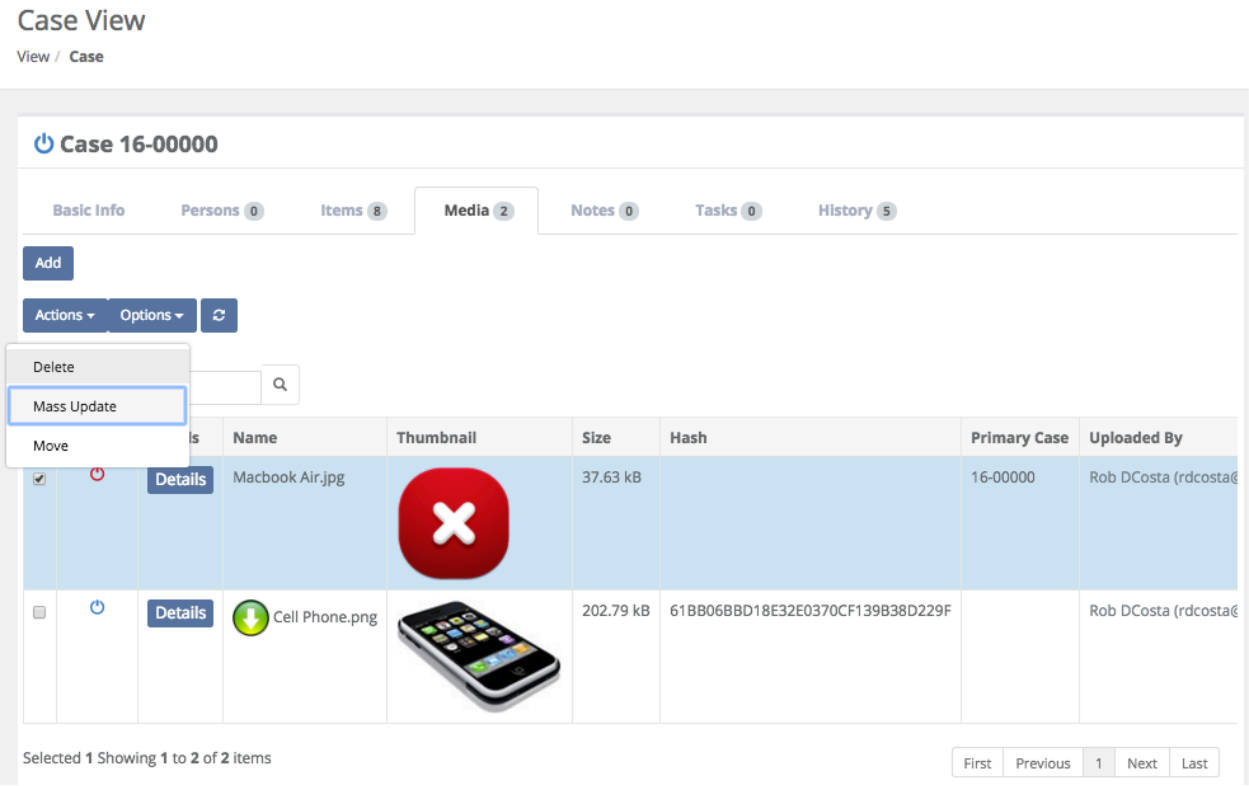
After clicking **Delete**, the following message will appear.



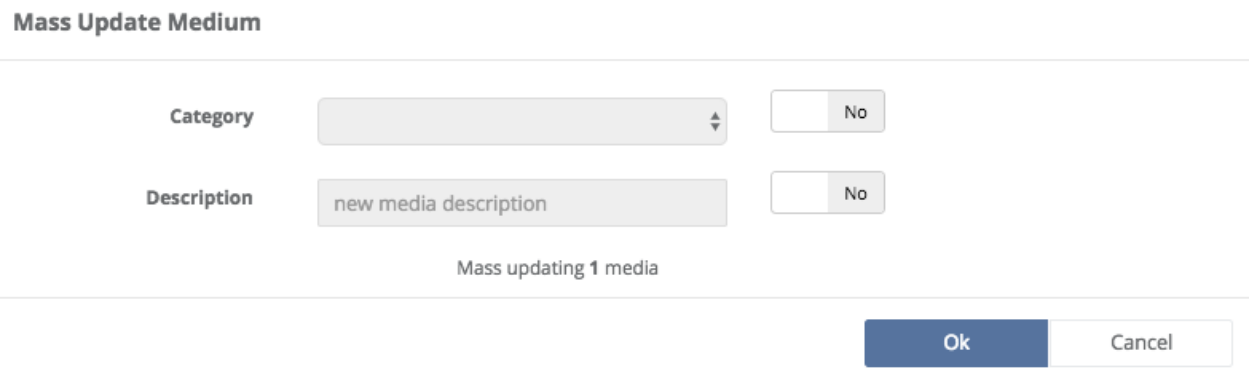
Once you Delete any Media, the files will be Permanently Deleted, and Completely Unrecoverable! **Deleted Media** will then be designated by a white “X” with a red background.



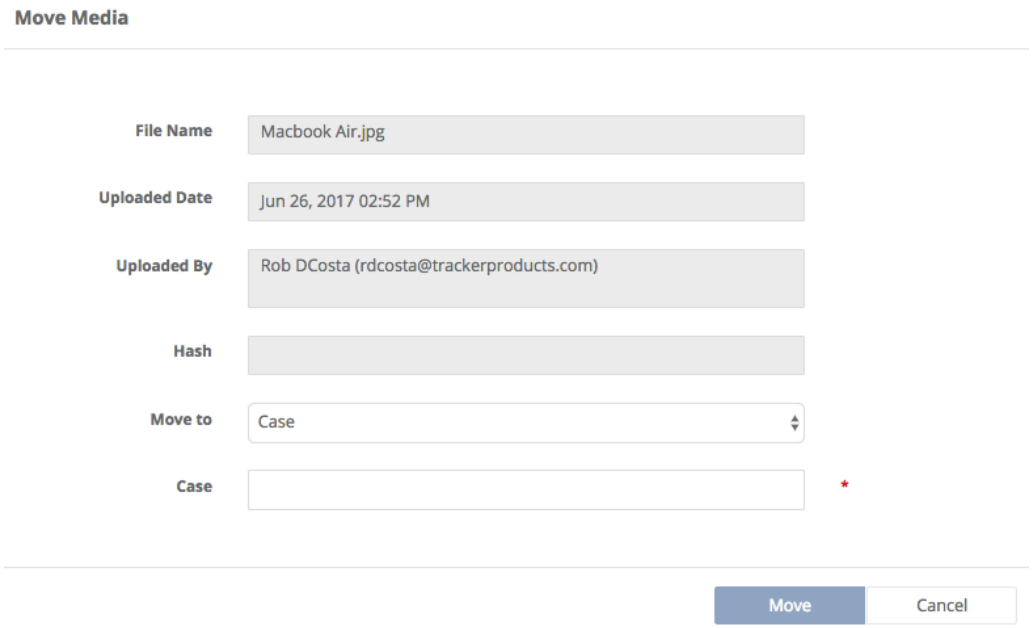
A useful feature from the Cases View is being able to **Mass Update** Media. Simply check the check box for the Media you're interested in. Next, click the Actions Box, and finally click **Mass Update**.



A Mass Update Medium pop up window will then appear. You may now **Mass Update** the Category and/or Description(s) or Item(s).



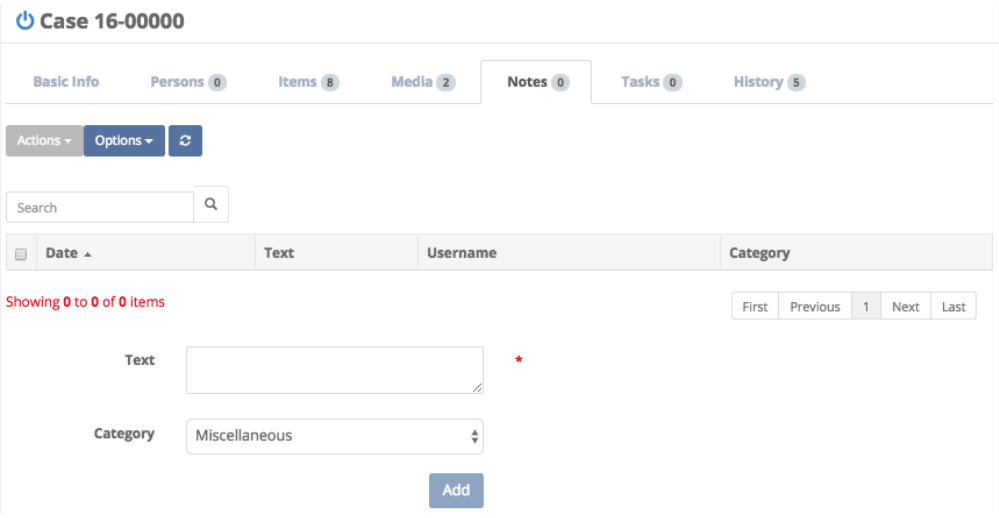
Another useful feature from the Case View is being able to **Move** Media to another Case or Item. Simply check the check box for the Media you're interested in. Next, click the Actions Box, and finally click **Move**. A **Move Media** pop up window will then appear. You may now **Move** the Media to another Case or Item.



More information regarding Media can be found by listening to our webinar:
SAFE Sessions 3 - Media and On Premise File Server @
https://vimeo.com/213138970/45faf15f72

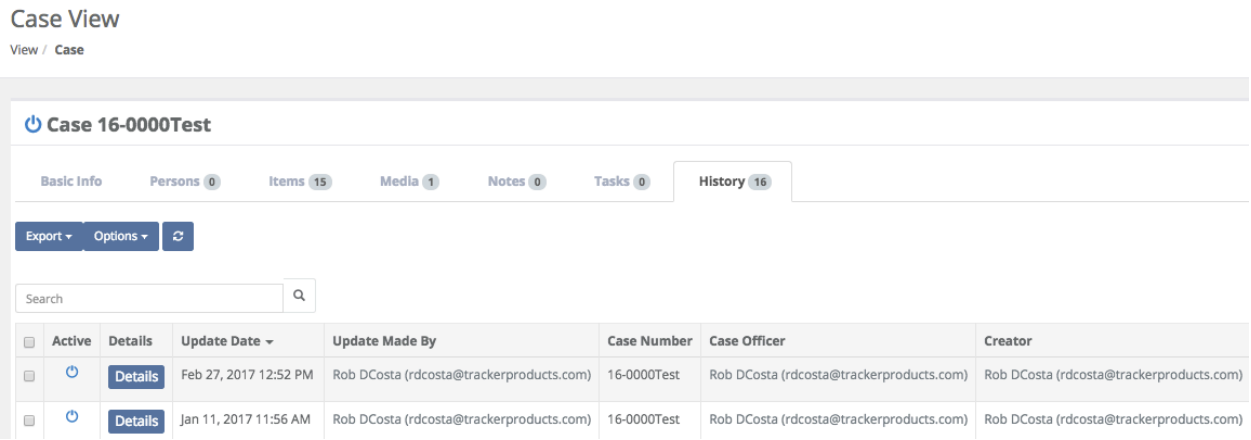
Search \ Case \ Notes Tab

In the Items Section, under the **Notes** tab, you will see Notes associated with the particular case you have brought up if there are any. You also have the option of **Adding Notes** by typing a Note you'd like to Add (which is **Required**), then clicking Add.

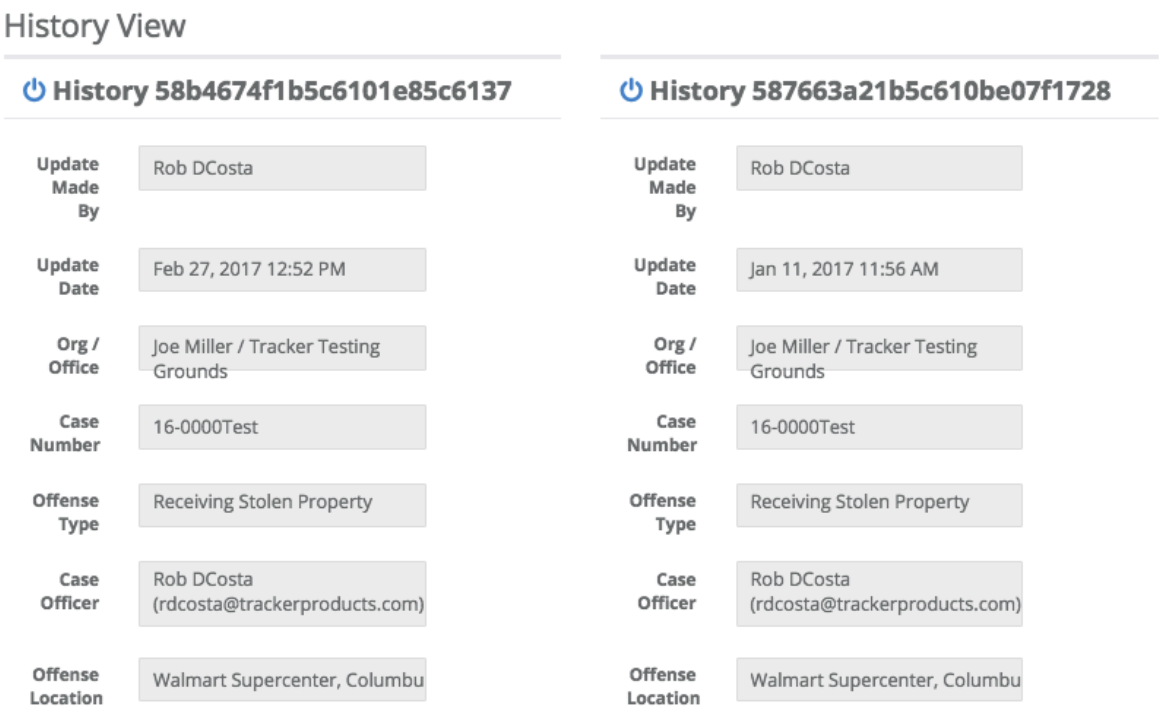


Search \ Case \ History Tab

From the Case (or Item) View, under the **History** tab, you will see History associated with the particular Case (or Item) you have brought up if there is any. You may choose to Export the History associated with this Case (or Item) by clicking the checkbox next to the History you're interested in Exporting, then clicking the **Export** box and choosing Selected.



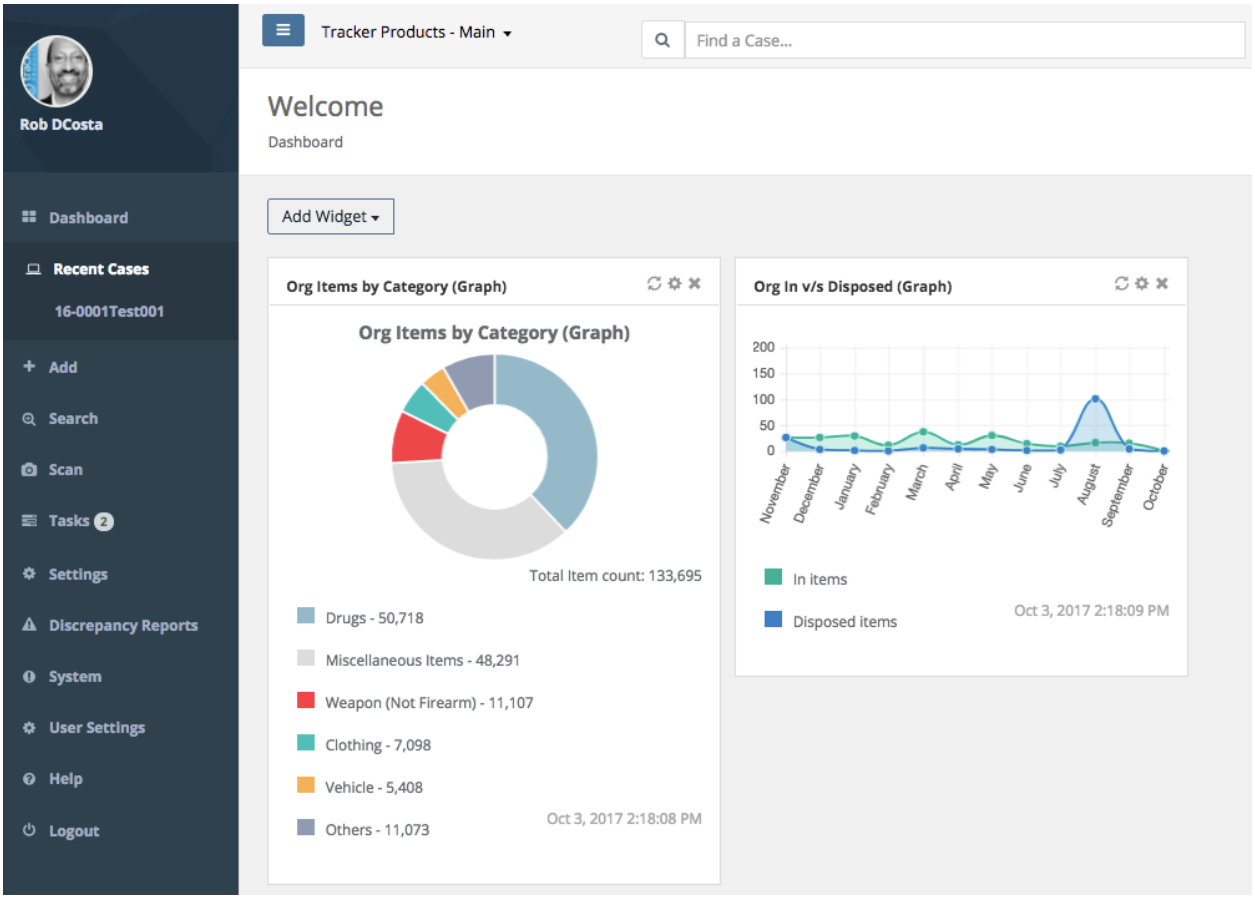
On the **History** tab for Cases and Items, next to each History entry is a 'Details' button which will show more Details on an item. If you click the Details button, you will see two columns of information. The column on the left is the most current information on that Case (or Item), and the column one the right was the previous update. In addition to that, red values reflect changes that were made in the most recent update.



Viewing Recent Cases

Quick Menu » Recent Cases

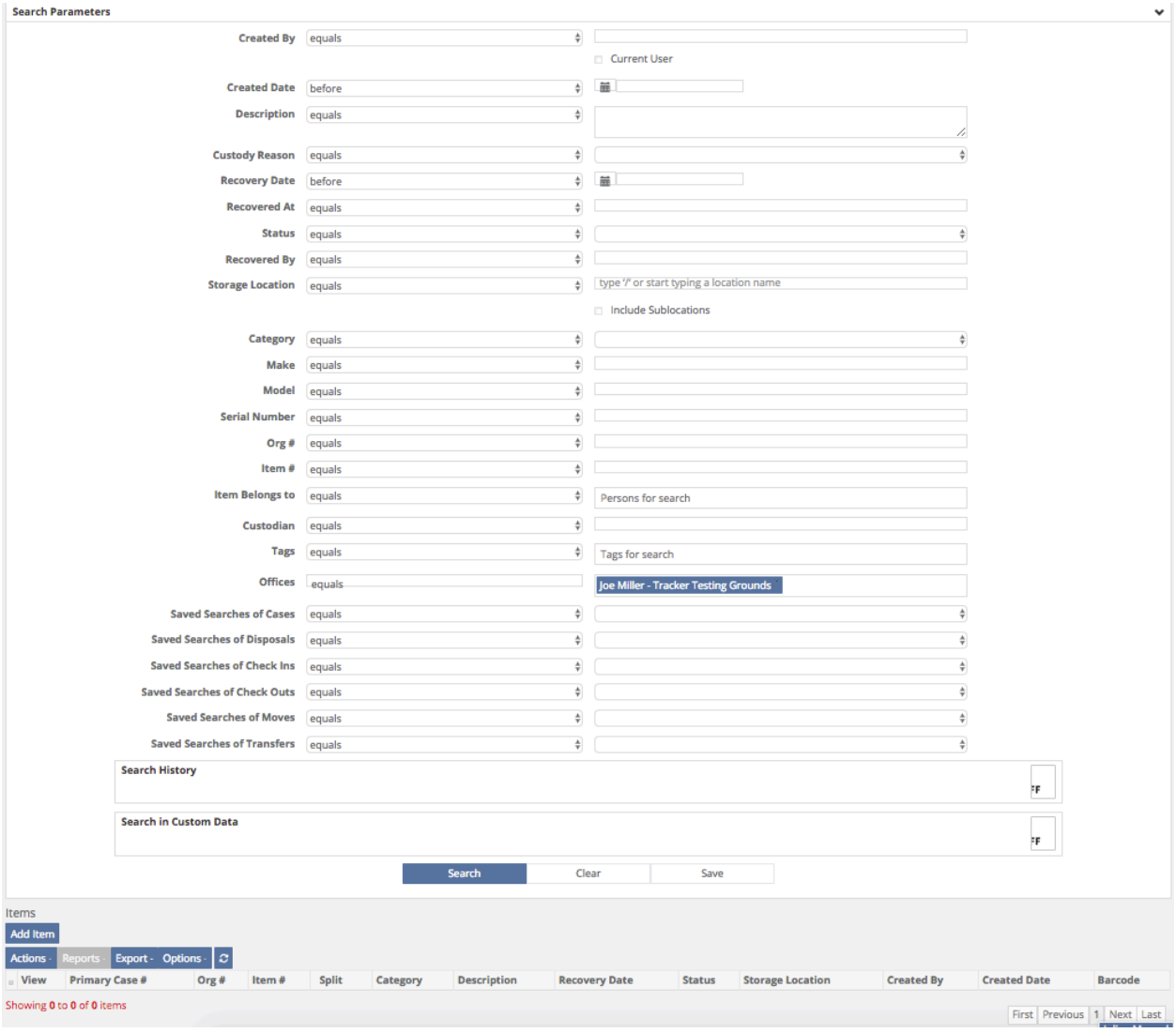
A very fast way to view cases you've recently brought up is by clicking **Recent Cases** from the Quick Menu on the left hand side of the screen. This will let you view your last 15 cases.



Searching for Items

Quick Menu » Search \ Items

Click **Search** from the Quick Menu on the left hand side of the screen and select **Items**. This will take you to the **Advanced Search Items** screen where you can customize your search. Choose from a number of variables depending on what Item(s) you're searching for.



More information regarding **Searches** can be found by listening to our webinar:

SAFE Sessions 1 - Advanced Searching @
https://vimeo.com/202443717/e9eb495b03

Fields on the Items Search page

Created By

Choose either ‘equals’ or ‘not equals’, then enter the name of the person who created the case. You may also choose to select ‘Use the logged in user for this search’.

Created Date

The date the Case was created. Click anywhere in the Created Date field to bring up a list of options to choose from. Next, in the box to the right of the Created Date field, there is a Calendar field where you can enter your parameters.

Description

Click anywhere in the Description field to bring up a list of options to choose from. Next, in the box to the right of the Description field, type in your search parameters.

Custody Reason

Choose equals or not equals, then click the box to the right and make a selection.

Recovery Date

Click anywhere in the Recovery Date field to bring up a list of options to choose from. Next, in the box to the right of the Recovery Date field, there is a Calendar field where you can enter your parameters.

Recovered At

Click anywhere in the Recovered At field to bring up a list of options to choose from. Next, in the box to the right of the Recovered At field, type in your search parameters.

Status

Click anywhere in the Status field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Status field, you may choose from the menu of options as to whether the Item has been ‘checked in’ or ‘disposed of’ etc.

Recovered By

Click anywhere in the Recovered By field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Recovered By field, type in your search parameters.

Storage Location

This is where the Item is currently located. This may be a Temporary Locker, a box on a shelf in your evidence room, or a safe, for example. Click anywhere in the Storage Location field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Storage Location field, type in your search parameters. You may also check the Include Sublocations box to include any sublocations in the root Storage Location you selected, in your search.

Category
Click anywhere in the Category field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Category field, you may choose from the menu of available options.

Make
Click anywhere in the Make field to bring up a list of options to choose from. Next, in the box to the right of the Make field, type in your search parameters.

Model
Click anywhere in the Model field to bring up a list of options to choose from. Next, in the box to the right of the Model field, type in your search parameters.

Serial Number
Click anywhere in the Serial Number field to bring up a list of options to choose from. Next, in the box to the right of the Serial Number field, type in your search parameters.

Org
Click anywhere in the Org # field to bring up a list of options to choose from. Next, in the box to the right of the Org # field, type in your search parameters. The Org # is a system assigned number given to all entries. It is the most current ascending, unique number any Item is assigned in the Organization when entered.

Item
Click anywhere in the Item # field to bring up a list of options to choose from. Next, in the box to the right of the Item # field, type in your search parameters. The Item # (Agency Item Number) is a sequential, ascending number any Item(s) are assigned by the system when they are entered into a particular Case.

Item Belongs To
To update who this Item Belongs To, type a Person’s name for the search.

Custodian
Can be equals or not equals to the person responsible for this Item. For example, when an Item has been Checked Out.

Tags
A searchable label any User can create that is attached to a Case or Item for the purpose of identification. Click anywhere inside the Tags field and start typing to bring up a list of available Tag options (which have already been entered) to choose from.

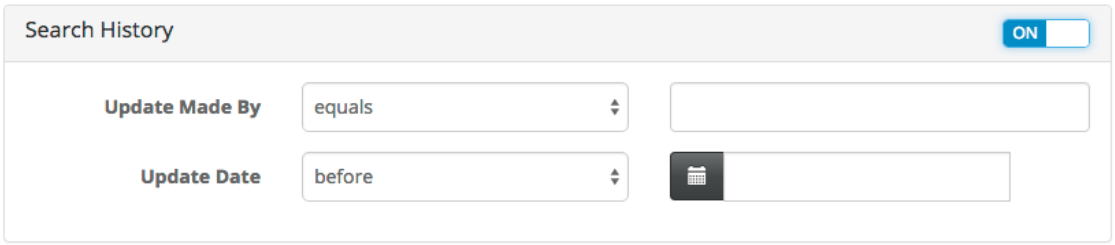
Offices
Which Office location(s) does this Item pertain to? Click anywhere in the Offices field and choose ‘equals’ or ‘not equals’. Next, click anywhere in the box to the right of the Offices field and select your option(s) from the scrollable menu.

Saved Searches of Cases, Disposals, Check Ins, Check Outs, Moves, and Transfers

Which Saved Search does the Item pertain to? Click anywhere in the Saved Searches (equals) field and choose ‘equals’ or ‘not equals’. Next, click anywhere in the box to the right of that, and select your Saved Search(s) from the scrollable menu.

Search History \ Update Made By

When the Search History field is turned ‘on’, you may click anywhere in the Update Made By field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Update Made By field you can enter your parameters.

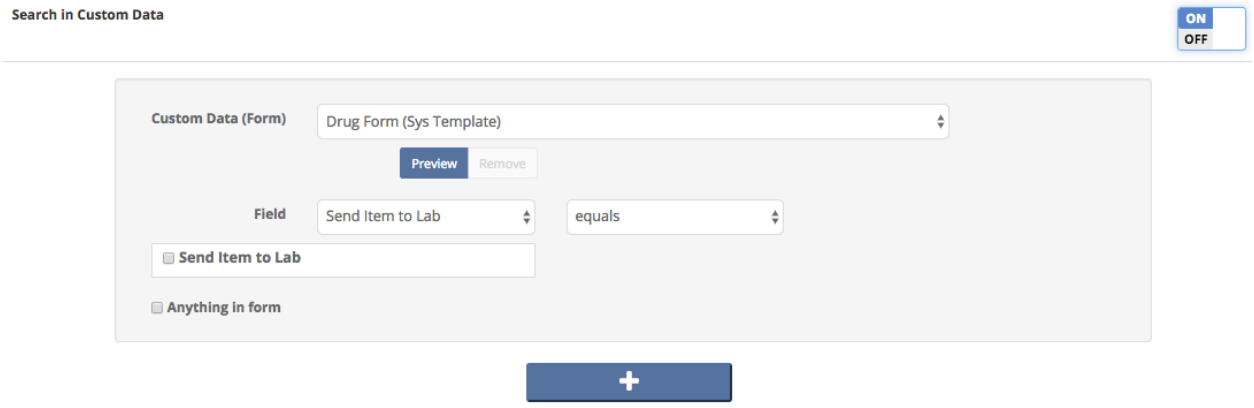


Search History \ Update Date

When the Search History field is turned ‘on’, you may click anywhere in the Update Date field to bring up a list of options to choose from. Next, in the box to the right of the Update Date field, there is a Calendar field where you can enter your parameters.

Search in Custom Data \ Form

When the Search in Custom Data field is turned ‘on’, you may click anywhere in the Form field to bring up a list of Forms to choose from.



Search in Custom Data \ Field

When the Search in Custom Data field is turned ‘on’, you may click anywhere in the Field box to bring up a list of options to choose from. To the right of the Field box, you may choose ‘equals’ or ‘not equals’.

Search in Custom Data \ Send Item to Lab (check box)

When the Search in Custom Data field is turned ‘on’, if you are sending this item to the lab, make sure the Send Item to Lab box is checked.

Search in Custom Data \ Anything in form (check box)

When the Search in Custom Data field is turned ‘on’, you may click the Anything in form (check box) to select a search pertaining to anything in the form you have selected.

Buttons on the Search in Custom Data field

+

Choose the ‘plus’ button on the Search in Custom Data field to add additional forms you can Search and select parameters for.

Buttons on the Items Search Page

Search

Once you have entered all of your parameters, click the Search button to search cases.

Clear

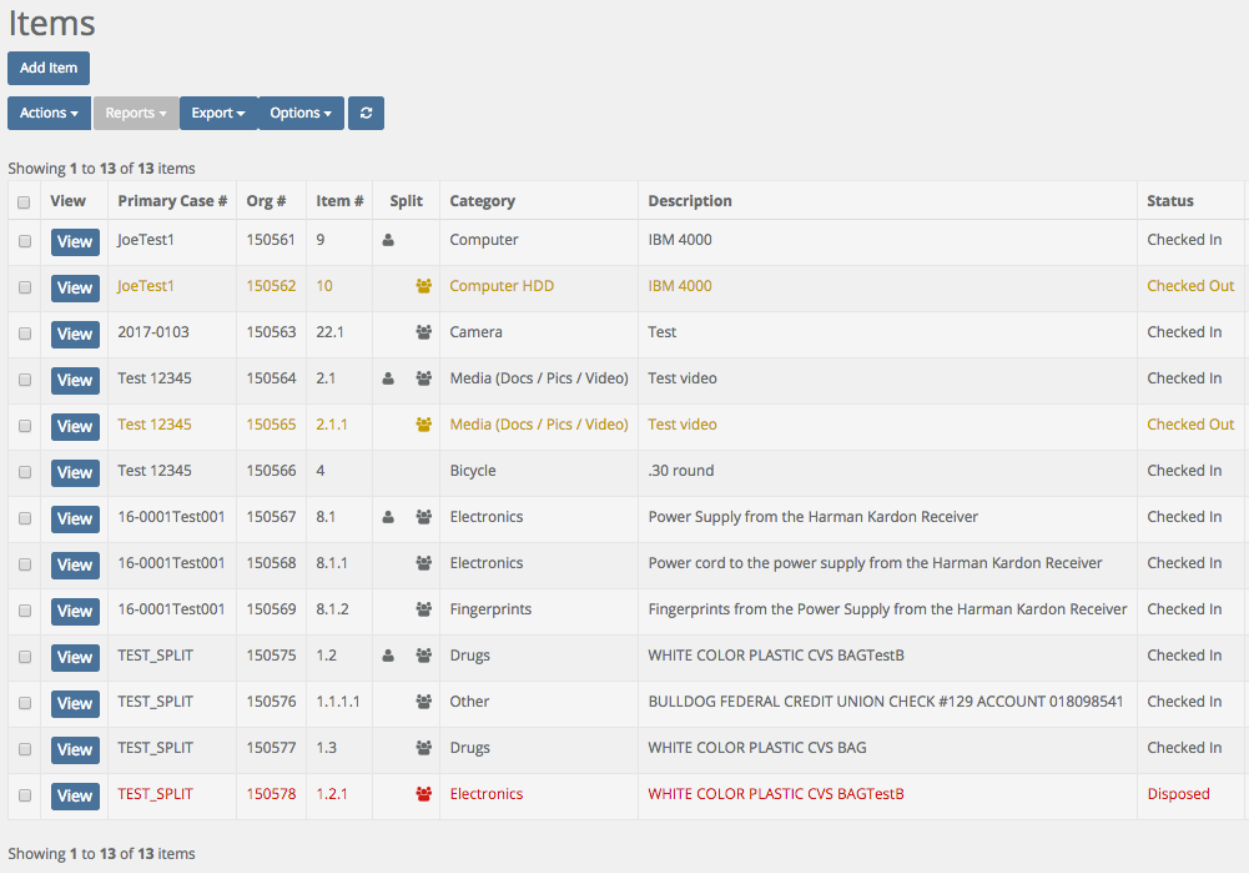
Click this button to reset all parameters.

Save

Click here to save a copy of the Search containing the parameters you’ve chosen.

Items Found from a Search - All Items

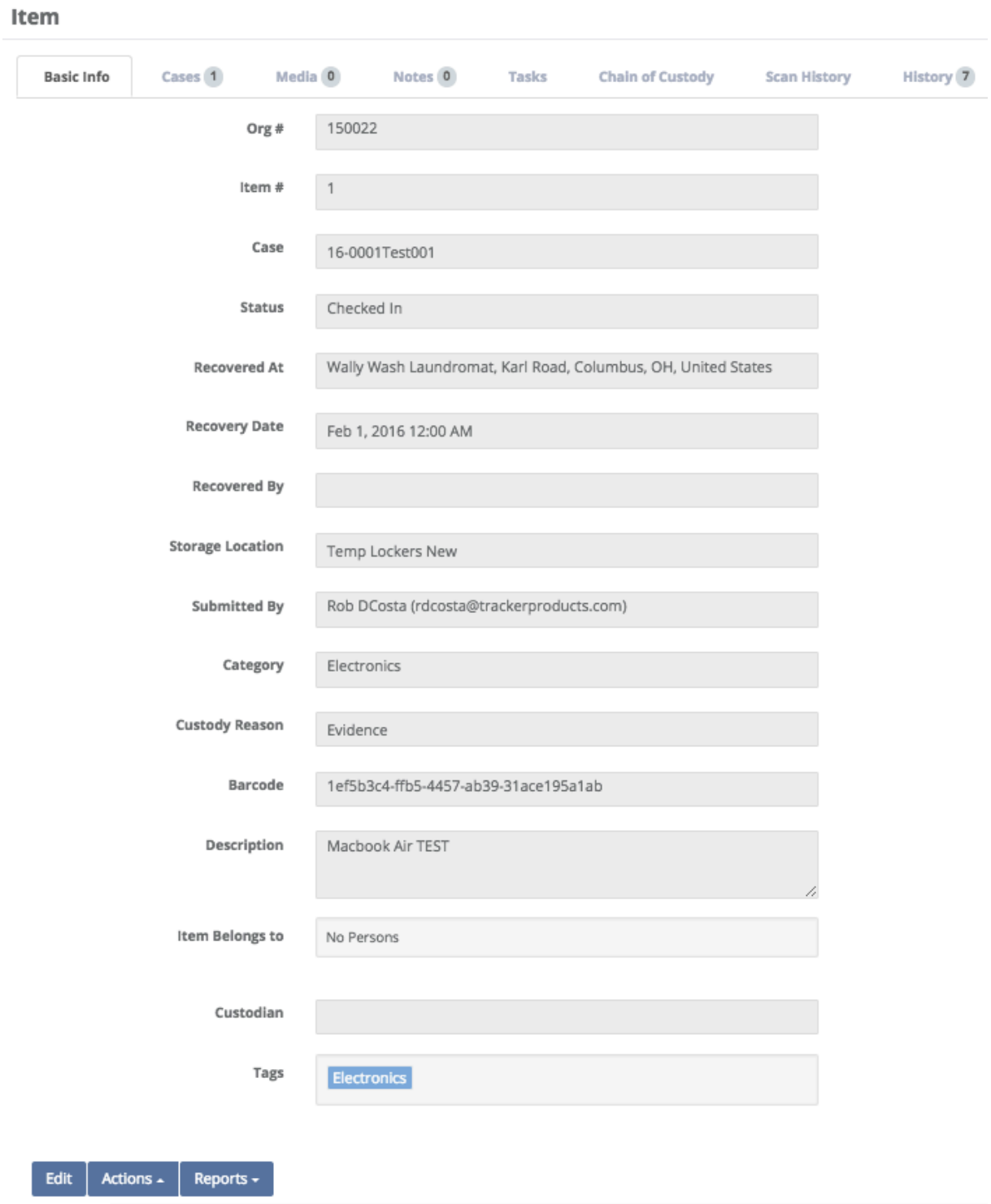
After you have run a Search for an Item, a list of Items will appear. You can an **Add Item**(s) to this list by clicking the **Add Item** box (explained in the **Creating an Item** section), or highlight the Item(s) you're interested in by clicking the small box next to the View box. You may also click on the **Actions**, **Reports**, **Export**, or **Options** boxes for more choices (explained in the previous **Search \ Case \ Items Tab** section).



View	Primary Case #	Org #	Item #	Split	Category	Description	Status
View	JoeTest1	150561	9		Computer	IBM 4000	Checked In
View	JoeTest1	150562	10		Computer HDD	IBM 4000	Checked Out
View	2017-0103	150563	22.1		Camera	Test	Checked In
View	Test 12345	150564	2.1		Media (Docs / Pics / Video)	Test video	Checked In
View	Test 12345	150565	2.1.1		Media (Docs / Pics / Video)	Test video	Checked Out
View	Test 12345	150566	4		Bicycle	.30 round	Checked In
View	16-0001Test001	150567	8.1		Electronics	Power Supply from the Harman Kardon Receiver	Checked In
View	16-0001Test001	150568	8.1.1		Electronics	Power cord to the power supply from the Harman Kardon Receiver	Checked In
View	16-0001Test001	150569	8.1.2		Fingerprints	Fingerprints from the Power Supply from the Harman Kardon Receiver	Checked In
View	TEST_SPLIT	150575	1.2		Drugs	WHITE COLOR PLASTIC CVS BAGTestB	Checked In
View	TEST_SPLIT	150576	1.1.1.1		Other	BULLDOG FEDERAL CREDIT UNION CHECK #129 ACCOUNT 018098541	Checked In
View	TEST_SPLIT	150577	1.3		Drugs	WHITE COLOR PLASTIC CVS BAG	Checked In
View	TEST_SPLIT	150578	1.2.1		Electronics	WHITE COLOR PLASTIC CVS BAGTestB	Disposed

Items Found from a Search - Individual Items

After running a Search for an Item, a list of Items will appear. Highlight the Item you're interested in by clicking the small box next to View and/or clicking **View** to examine the individual item's attributes. You will be taken to the **Item View** screen **Basic Info** Tab.



Fields on the Items Found from a Search - Individual Items Screen

Org

The Org # is a system assigned ascending Item # for every Item in the system. It gives you an idea of how many Items you have entered. Since the system allows you to Move Items from one Case to another, it is advisable to use the Org # since it will be a unique number no matter what Case the Item is in (*see Editing an Item and Managing Cases for more information*).

Item

The Item # (Agency Item Number) is a sequential, ascending number any Item(s) are assigned by the system when they are entered into a particular Case.

Case

This is the Case this Item belongs to.

Status

This field will show if the Item is checked in or out etc.

Recovered At

This is the location the Item was Recovered At.

Recovery Date

This is the Date the Item was recovered.

Recovered By

This field shows who recovered the Item.

Storage Location

This is where the Item is currently located. This could be a safe or temporary locker for example.

Submitted By

The person who submitted the Item.

Category

The category this Item belongs to.

Custody Reason

The reason for having this Item.

Serial Number

The serial number of the Item, if it has one.

Model

What model the Item is.

Barcode
The Barcode field consists of a unique GUID (Globally Unique Identifier which is a unique 128-bit integer number). This number uniquely identifies the Item it relates to.

Make
What make the Item is.

Description
A brief description of the item.

Item Belongs To
To update who this Item Belongs To, type one here and select Yes.

Custodian
Who is the custodian of this evidence?

Child Items
Child Items associated with this Parent Item will be shown here.

Tags
A searchable label any User can create that is attached to a Case or Item for the purpose of identification. Click anywhere inside the Tags field and start typing to bring up a list of available Tag options (which have already been entered) to choose from.

Buttons on the Item View \ Item Page
Edit
Allows you to edit the item.

Actions Box
From here, you are able to perform many functions such **Check Out** or **Move** an item.

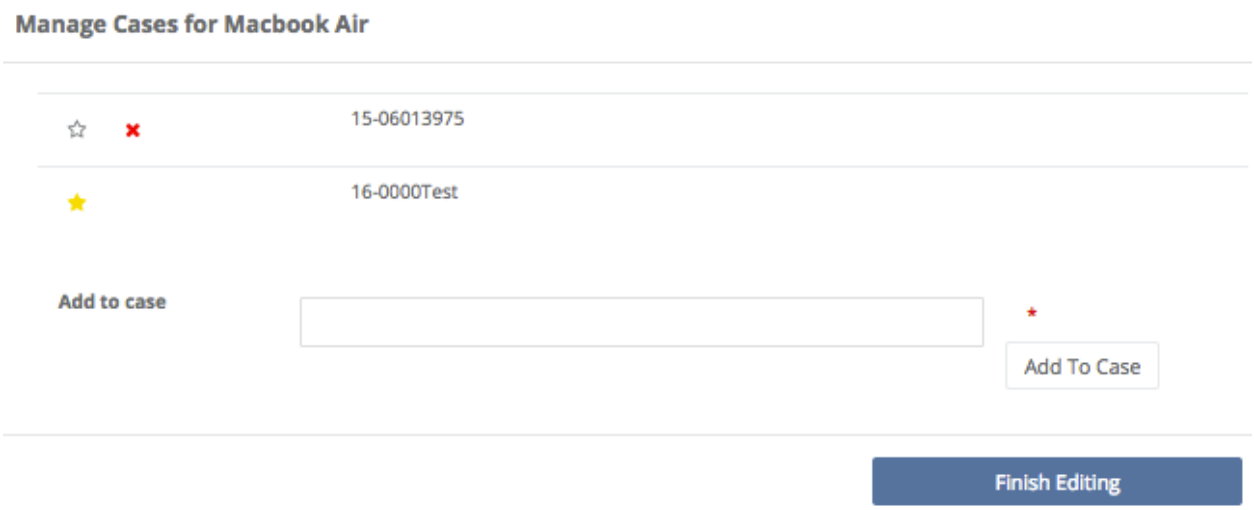
Reports Box
From here, select a report or label you would like to run on the selected item.

Editing an Item and Manage Cases

1. You may **Edit** the **Item** by clicking the **Edit** box, or click the **Actions** box and choose a selection (like checking an **Item** in or out).

After clicking **View** (the Item), the choices in the **Actions** menu are exactly the same as explained in the previous **Search \ Case \ Items Tab** section). The only different selection in the **Actions** menu is **Manage Cases**.

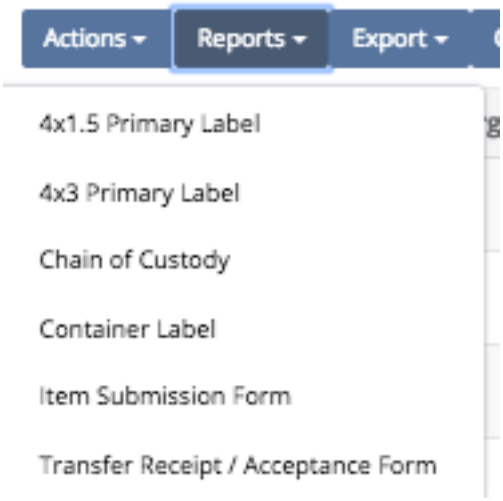
2. The **Manage Cases** feature found in the **Actions** menu, will allow you to "Set this as the Item's primary case" by clicking the star icon. You may also "Remove item from this case" by clicking the "**x**", or you may **Add** the **Item** to a case by supplying a valid **Case Number** and clicking **Add To Case**. When you are finished, click the **Finish Editing** box.



Note: When changing an Item's Primary Case (moving the Item from one case to another), duplicate Item #s may be created! For this reason alone, we suggest using the Org # (on labels for example). The Org # will never have a duplicate!

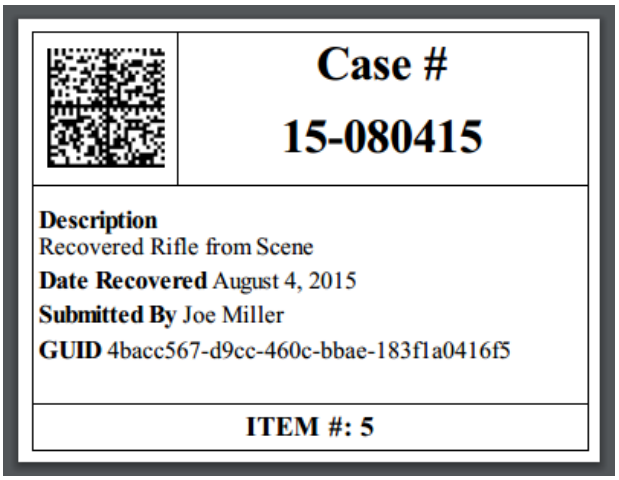
Running a Report and Printing an Item Label

You may also run a **Report** or **Print a Label** for the **Item** by clicking the **Reports** box and making a selection.

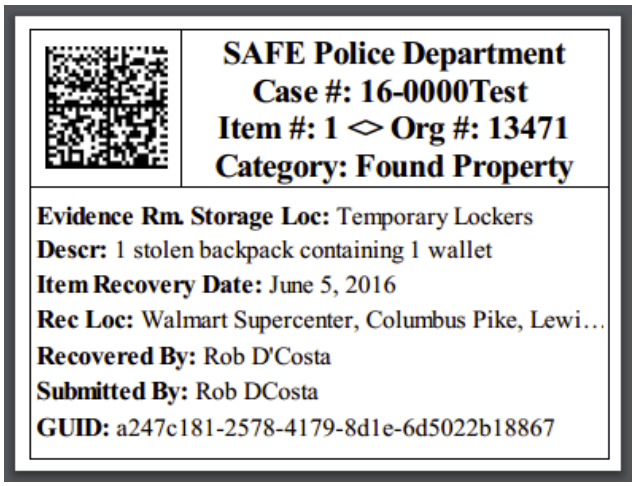


If you decide to **Print a Label or Report** for the **Item**, the software will automatically create an Adobe Acrobat file (.pdf) and the **Label or Report** will appear.

Label 1 example



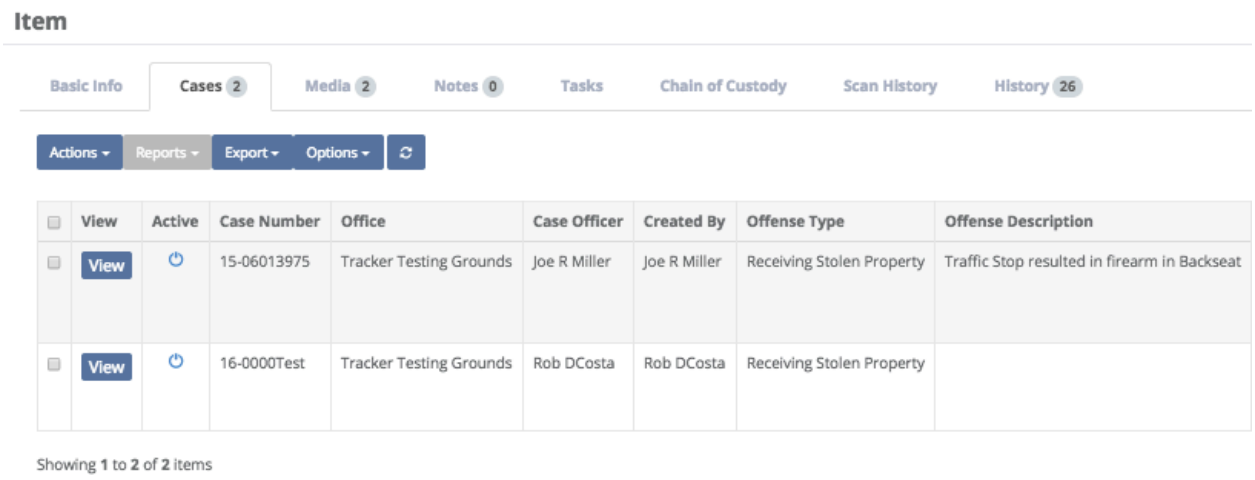
Label 2 example



Once the Adobe Acrobat (.pdf) file is generated, you will have some options to choose from in the top right hand corner of the screen. The first two options let you rotate the document. The third option (which looks like a disk) will let you save the document. Finally, the fourth option (which looks like a printer) will let you print the document.

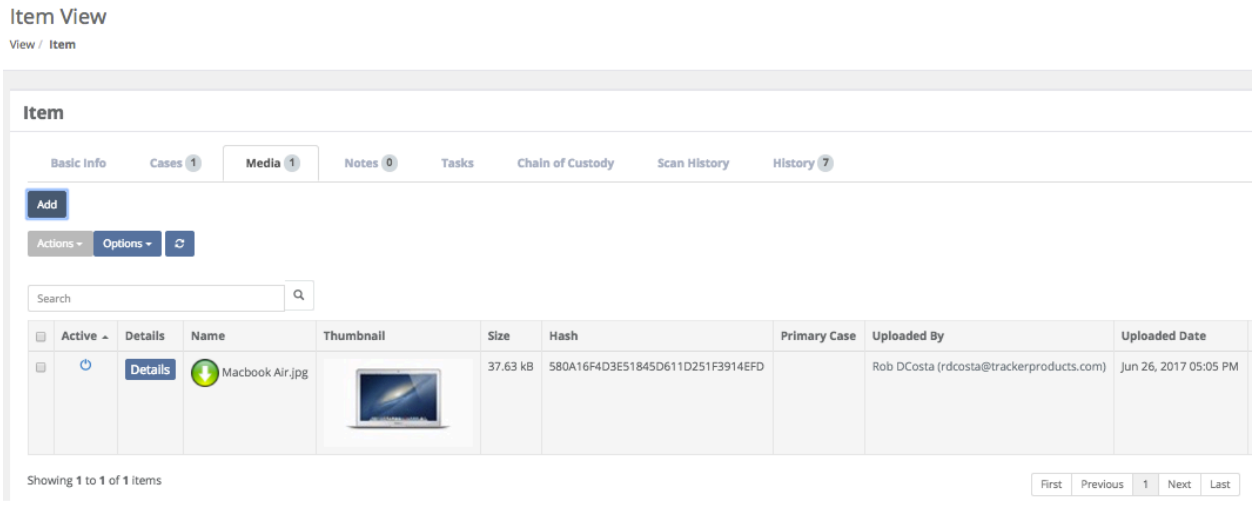
Search \ Item View \ Item \ Cases Tab

On the Item View page, under the **Cases** tab, you will see **Cases** associated with the particular Item you have brought up. You may view a Case by clicking the **View** box. You also have the option to export your results to a comma separated value (.csv) file from the **Actions** box. Finally, you can choose to export **All** Cases to a .csv file from the **Export** box.



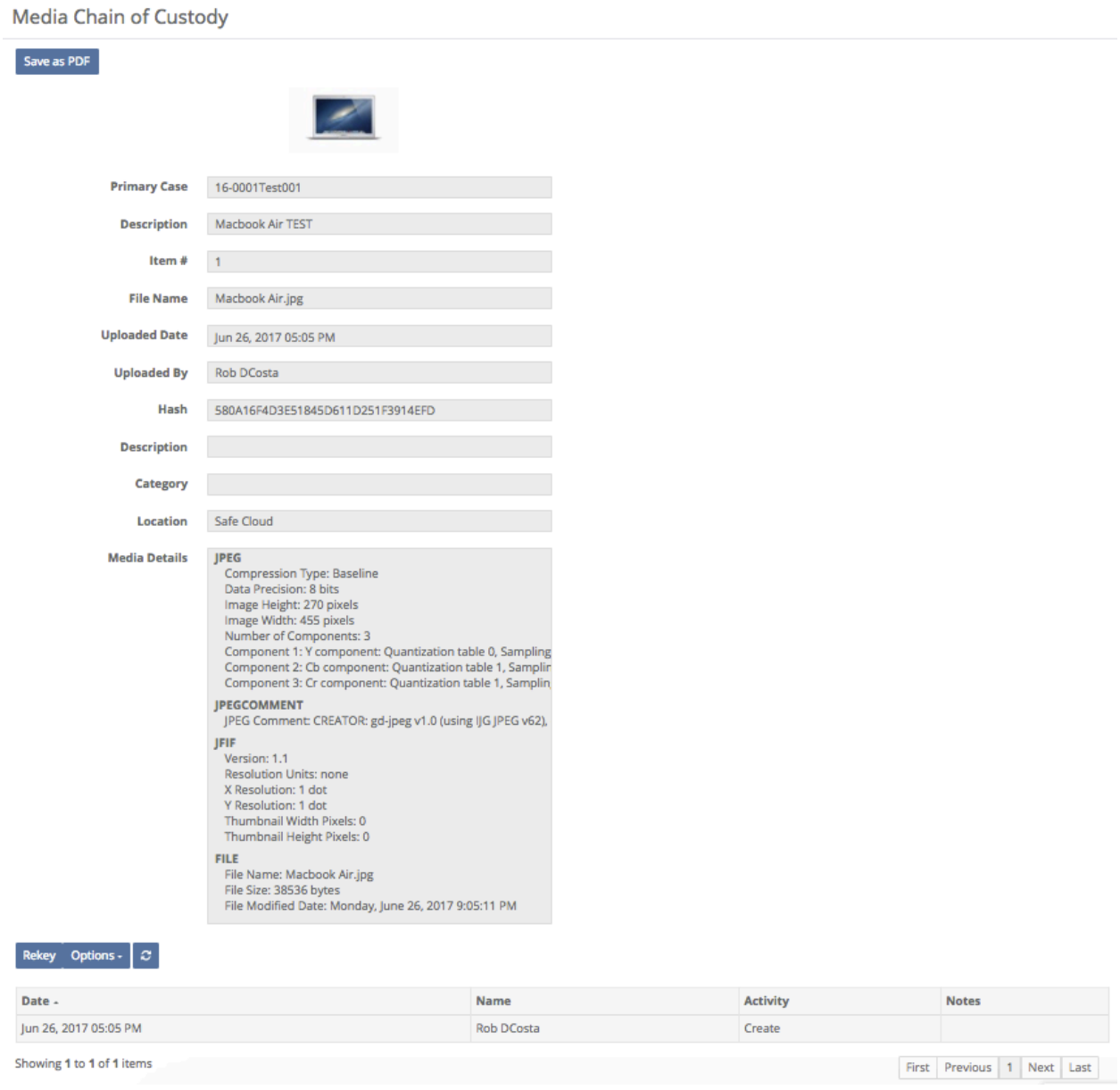
Search \ Item View \ Item \ Media Tab

On the Item View page, under the **Media** tab, you will see Media associated with the particular **Item** you have brought up, if there is any. If there is no Media associated with the item, you have the option of Uploading Media to the Item by clicking the **Add** box, then Dragging and Dropping your files into the marked box or clicking the **Upload Files** box and making selections.



You may also view the **Media CoC** by clicking the **Details** box. This will take you to the Media Chain of Custody page where you can view the Case Number the Media is associated with, the File Name of the Media, when the Media was uploaded etc. You are also able to view meta data associated with the Media.

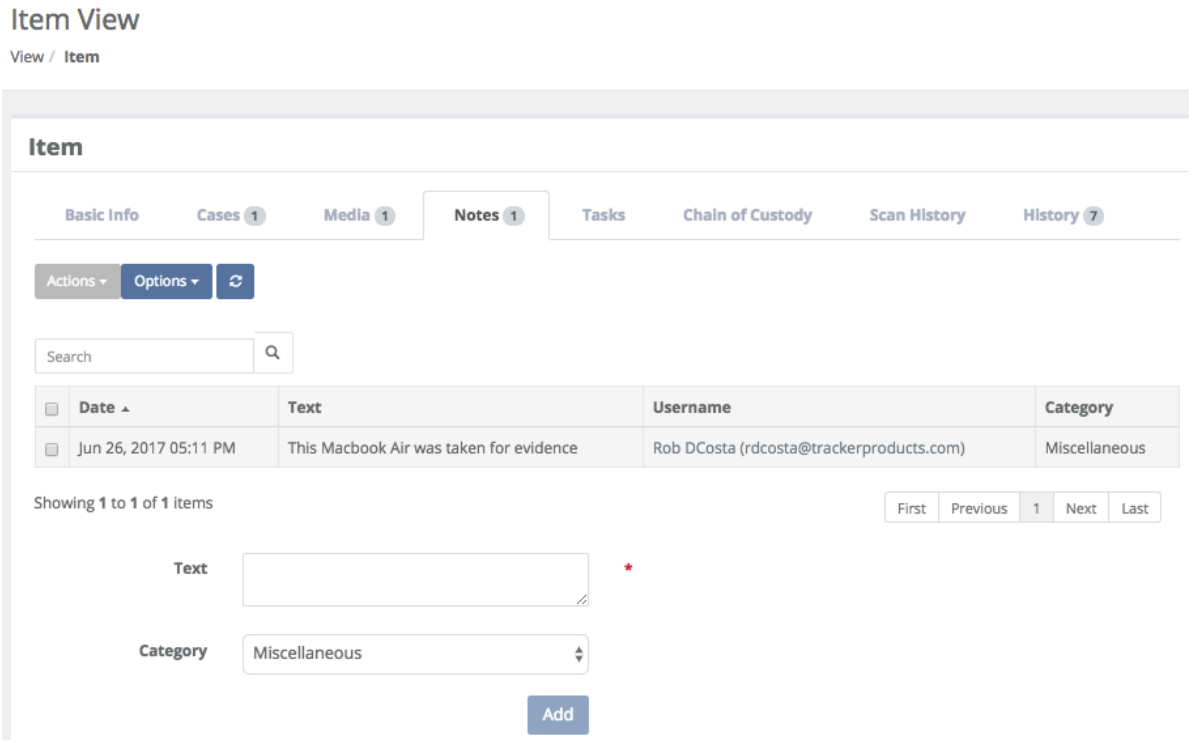
There is an option at the top of the page to generate an Adobe Acrobat (.pdf) file should you need it. Simply click the **Save as PDF** button, and the file will be downloaded to your local machine.



More information regarding Media can be found by listening to our webinar:
SAFE Sessions 3 - Media and On Premise File Server @
https://vimeo.com/213138970/45faf15f72

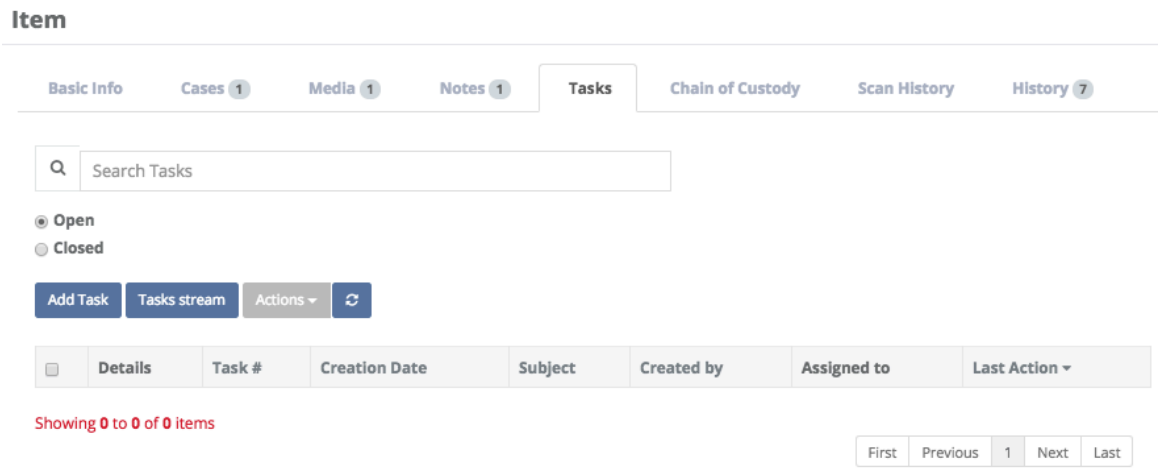
Search \ Item View \ Item \ Notes Tab

On the Item View page, under the **Notes** tab, you will see Notes associated with the particular case you have brought up if there are any. You also have the option of **Adding Notes** by typing a Note you'd like to Add (which is **Required**), then clicking **Add**.



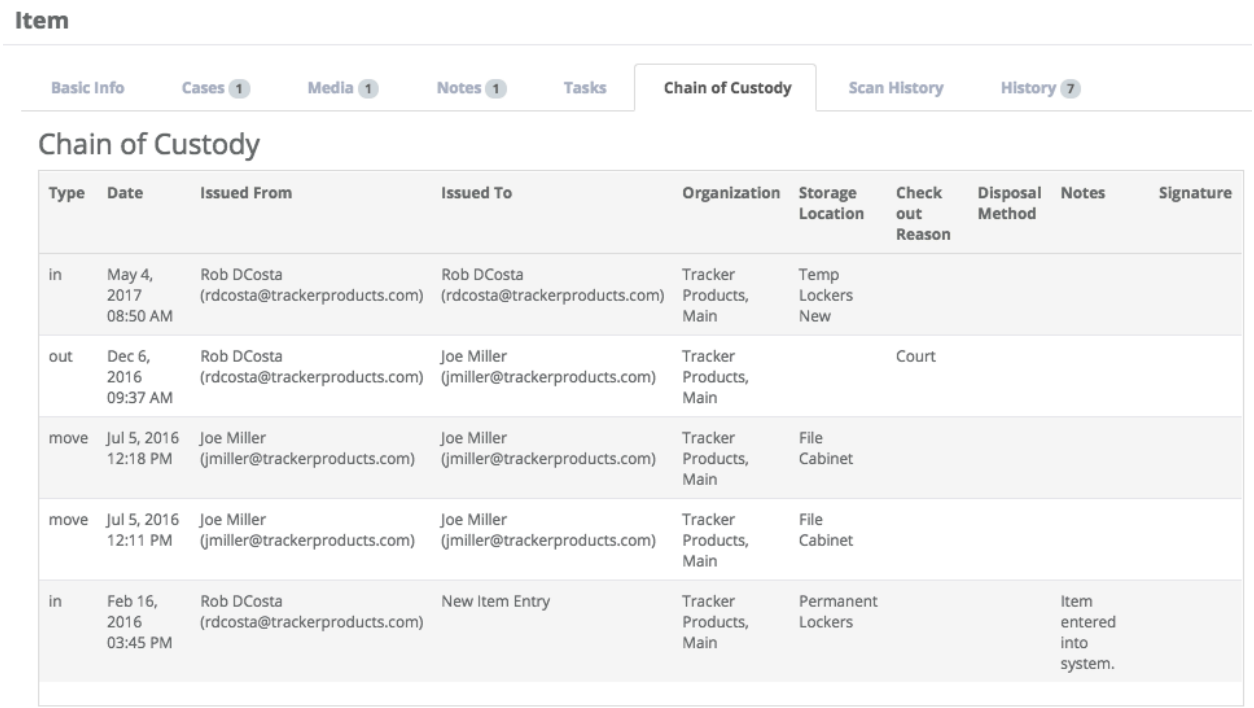
Search \ Item View \ Item \ Tasks Tab

On the Item View page, under the **Tasks** tab, you will see Tasks associated with the particular Item you have brought up if there are any. You also have the option of searching by Open or Closed Tasks as well as Adding Tasks to the Item etc.



Search \ Item View \ Item \ Chain of Custody Tab

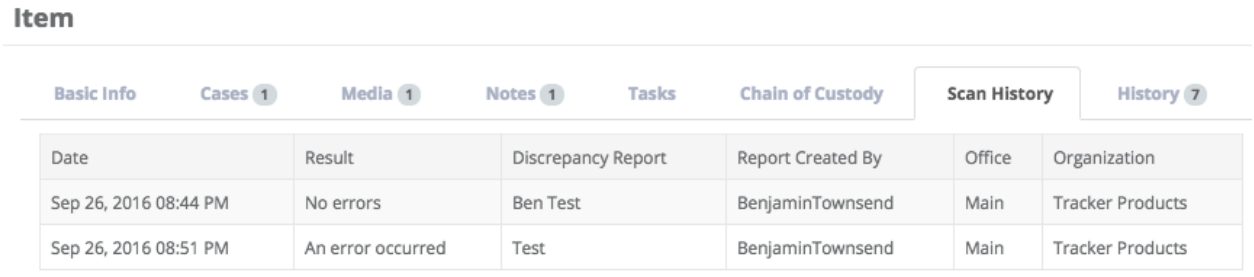
On the Item View page, the **Chain of Custody** tab shows when an item has been checked in or out, or has been disposed of, and who has performed this action.



Type	Date	Issued From	Issued To	Organization	Storage Location	Check out Reason	Disposal Method	Notes	Signature
in	May 4, 2017 08:50 AM	Rob DCosta (rdcosta@trackerproducts.com)	Rob DCosta (rdcosta@trackerproducts.com)	Tracker Products, Main	Temp Lockers New				
out	Dec 6, 2016 09:37 AM	Rob DCosta (rdcosta@trackerproducts.com)	Joe Miller (jmiller@trackerproducts.com)	Tracker Products, Main		Court			
move	Jul 5, 2016 12:18 PM	Joe Miller (jmiller@trackerproducts.com)	Joe Miller (jmiller@trackerproducts.com)	Tracker Products, Main	File Cabinet				
move	Jul 5, 2016 12:11 PM	Joe Miller (jmiller@trackerproducts.com)	Joe Miller (jmiller@trackerproducts.com)	Tracker Products, Main	File Cabinet				
in	Feb 16, 2016 03:45 PM	Rob DCosta (rdcosta@trackerproducts.com)	New Item Entry	Tracker Products, Main	Permanent Lockers			Item entered into system.	

Search \ Item View \ Item \ Scan History Tab

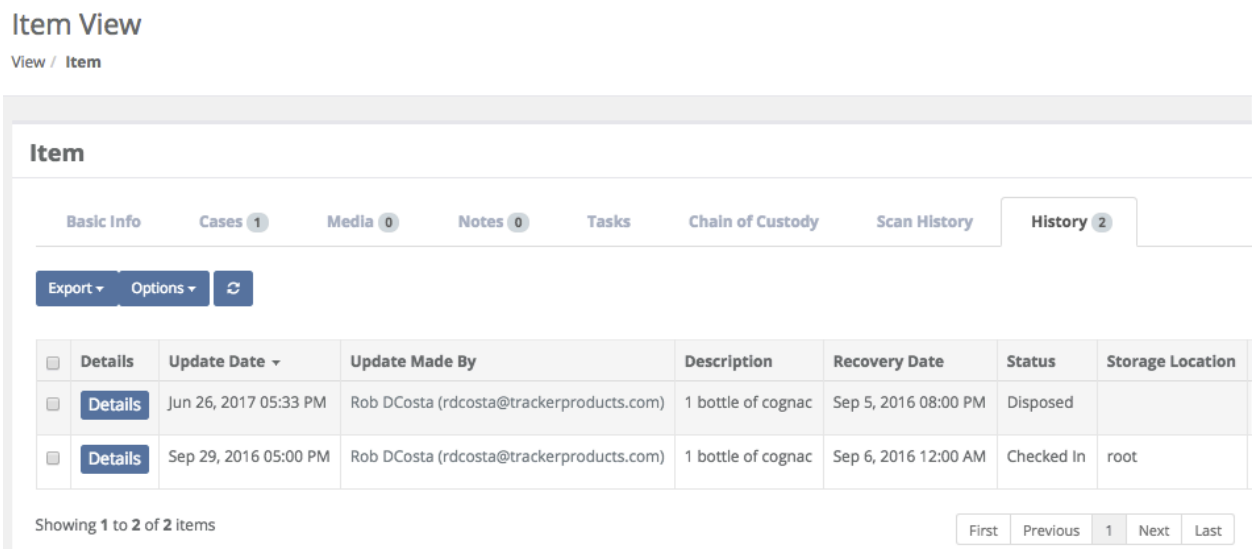
On the Item View page, under the **Scan History** tab, you will see the Scan History associated with the particular Item you have brought up if there is any.



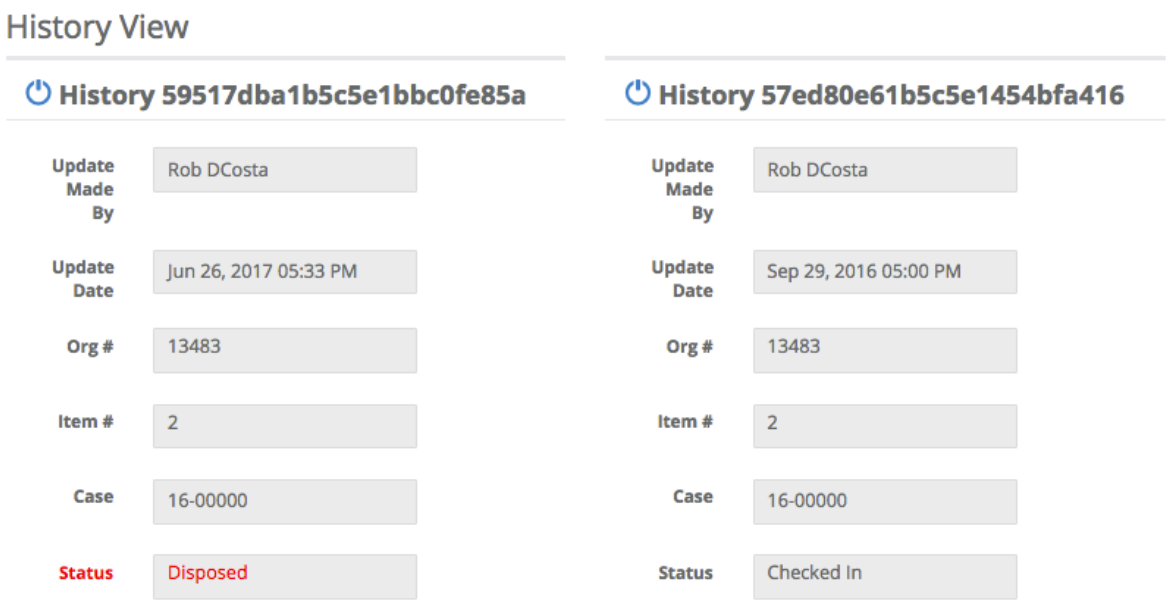
Date	Result	Discrepancy Report	Report Created By	Office	Organization
Sep 26, 2016 08:44 PM	No errors	Ben Test	BenjaminTownsend	Main	Tracker Products
Sep 26, 2016 08:51 PM	An error occurred	Test	BenjaminTownsend	Main	Tracker Products

Search \ Item View \ Item \ History Tab

From the Item (or Case) View, under the **History** tab, you will see History associated with the particular Item (or Case) you have brought up if there is any. You may choose to Export the History associated with this Item (or Case) by clicking the checkbox next to the History you're interested in Exporting, then clicking the **Export** box and choosing Selected.



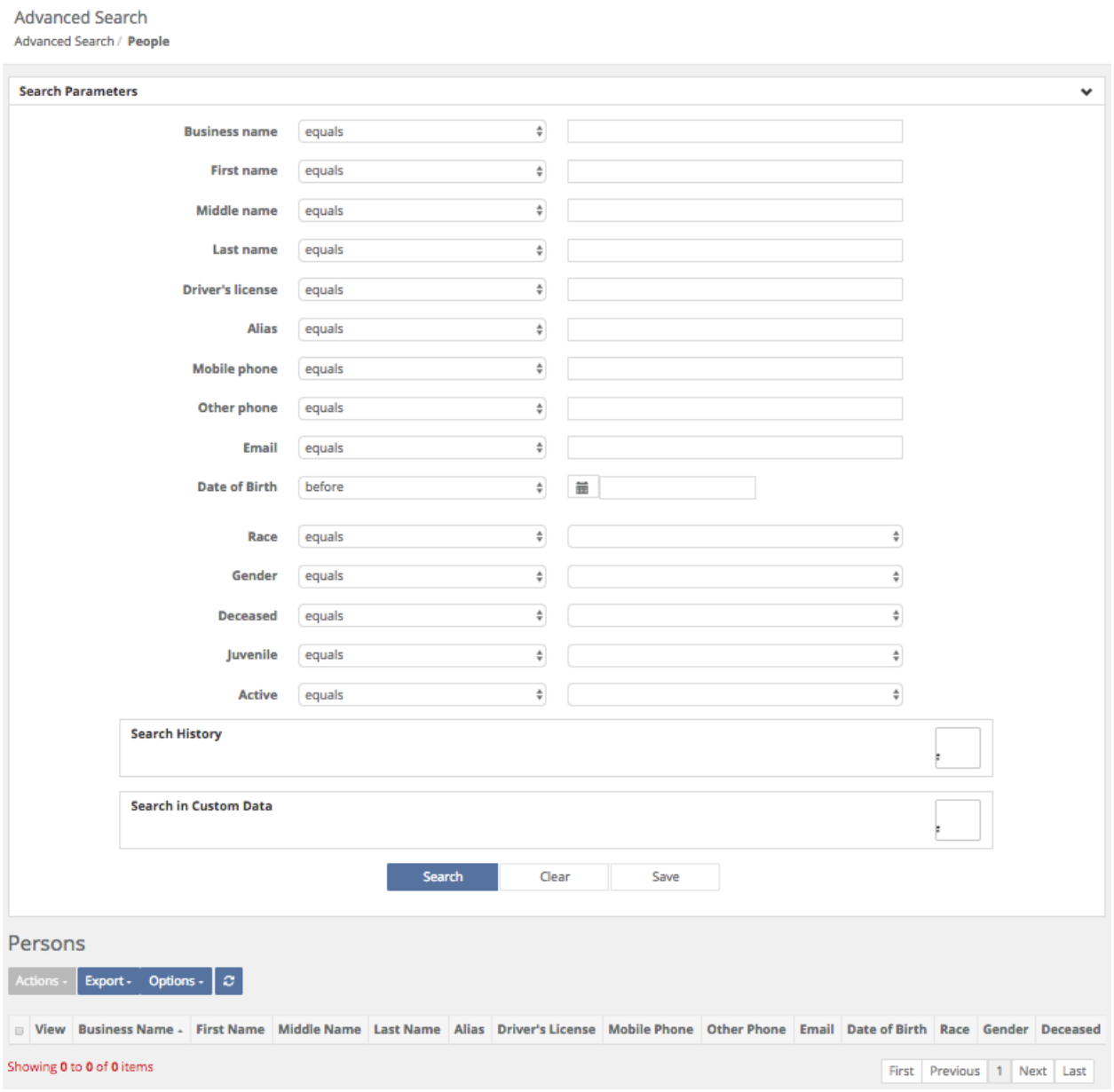
On the **History** tab for Cases and Items, next to each History entry is a 'Details' button which will show more Details on an item. If you click the Details button, you will see two columns of information. The column on the left is the most current information on that Case (or Item), and the column one the right was the previous update. In addition to that, red values reflect changes that were made in the most recent update.



Searching for People

Quick Menu » Search \ People

Click **Search** from the Quick Menu on the left hand side of the screen and select **People**. This takes you to the **Advanced Search People** screen. From here, you can customize the search parameters by selecting boxes with the two small triangles (on the right side of the box). Choose from a number of variables depending on what People(s) you're searching for. Or, if you know the People(s), simply type it in and click **Search**. This will show the People you searched for.



Fields on the People Search page

Business Name

Click anywhere in the Business Name field to bring up a list of options to choose from. Next, in the box to the right of the Business Name field, type in your search parameters.

First Name

Click anywhere in the First Name field to bring up a list of options to choose from. Next, in the box to the right of the First Name field, type in your search parameters.

Middle Name

Click anywhere in the Middle Name field to bring up a list of options to choose from. Next, in the box to the right of the Middle Name field, type in your search parameters.

Last Name

Click anywhere in the Last Name field to bring up a list of options to choose from. Next, in the box to the right of the Last Name field, type in your search parameters.

Driver's License

Click anywhere in the Driver's License field to bring up a list of options to choose from. Next, in the box to the right of the Driver's License field, type in your search parameters.

Alias

Click anywhere in the Alias field to bring up a list of options to choose from. Next, in the box to the right of the Alias field, type in your search parameters.

Mobile Phone

Click anywhere in the Mobile Phone field to bring up a list of options to choose from. Next, in the box to the right of the Mobile Phone field, type in your search parameters.

Other Phone

Click anywhere in the Other Phone field to bring up a list of options to choose from. Next, in the box to the right of the Other Phone field, type in your search parameters.

Email

Click anywhere in the Email field to bring up a list of options to choose from. Next, in the box to the right of the Email field, type in your search parameters.

Date of Birth

Click in the Date of Birth field to bring up a list of options to choose from. Next, in the box to the right of the Date of Birth field, there is a Calendar field where you can enter your parameters.

Race

Click anywhere in the Race field and choose 'equals' or 'not equals'. Next, in the box to the right of the Race field, select an option from the menu.

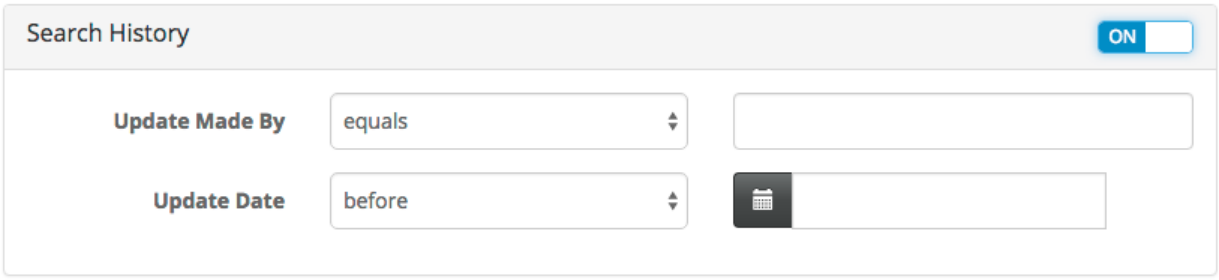
Gender
Click anywhere in the Gender field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Gender field, select an option from the menu.

Deceased
Click anywhere in the Deceased field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Deceased field, select ‘true’ or ‘false’.

Juvenile
Click anywhere in the Juvenile field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Juvenile field, select ‘true’ or ‘false’.

Active
Click anywhere in the Active field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Active field, select ‘true’ or ‘false’.

Search History \ Update Made By
When the Search History field is turned ‘on’, you may click anywhere in the Update Made By field and choose ‘equals’ or ‘not equals’. Next, in the box to the right of the Update Made By field you can enter your parameters.



Search History \ Update Date
When the Search History field is turned ‘on’, you may click anywhere in the Update Date field to bring up a list of options to choose from. Next, in the box to the right of the Update Date field, there is a Calendar field where you can enter your parameters.

Buttons on the People Search Page
Search
Once you have entered all of your parameters, click the Search button to search cases.

Clear
Click this button to reset all parameters.

Save
Click here to save a copy of the Search containing the parameters you’ve chosen.

People found from a Search

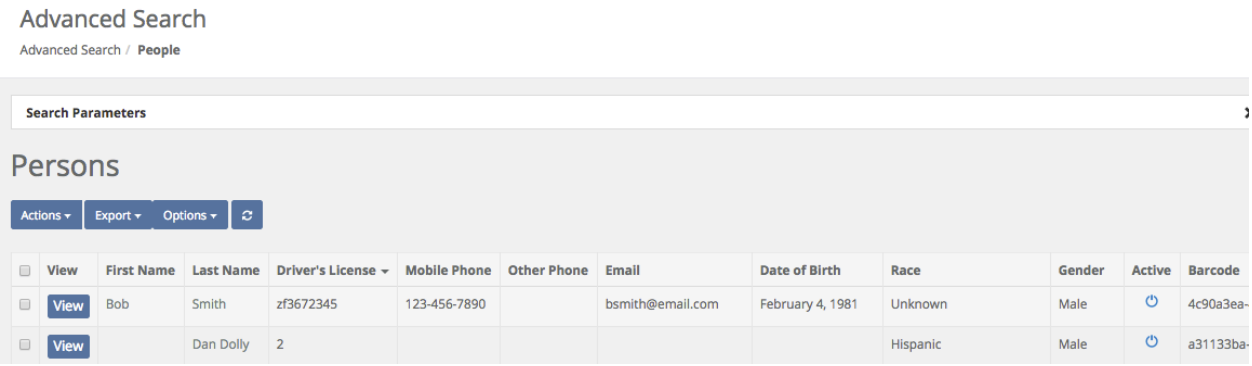
After running a Search on People, a list of Persons will appear. You can export your entire search to a comma separated value (.csv) file by clicking the **Actions** box and choosing **Export All Results**.

If you'd like to export your results by filtering them, choose that option from the **Export** box.

If you'd like to choose the results you want to export that you found from your search, highlight them by clicking anywhere in their row, then click the **Export** box and choose **Selected**.

Click the **Options** box to display the drop down **Options** menu. From here, select which columns of information you wish to see displayed. If you don't want a column displayed click on it's name and it will be removed (not permanently) from the list. For example, **Alias**, **Middle Name**, **Deceased**, **Juvenile**, and **Race** have been removed from the **Search** results below.

Click on any box at the top of the list you would like to sort by. Simply click **DOB** for example and the list will be sorted by that. Click **DOB** again, and the list will be sorted in reverse order.



From the list of Persons you just obtained, you may now click the View box next to their name which will take you to the Person View screen. From here, you will see information relating to that person such as their first, middle and last name.

If you scroll down to the bottom of the Person View screen, you can Add an Address for this person by clicking the Add Address button. If there are multiple addresses, you can **Set one as the Default**. You may also click the Notes Tab to add Notes relating to this person. Or you may click the Cases Involved Tab to see which Cases this person is associated with etc.

Searching for Disposals

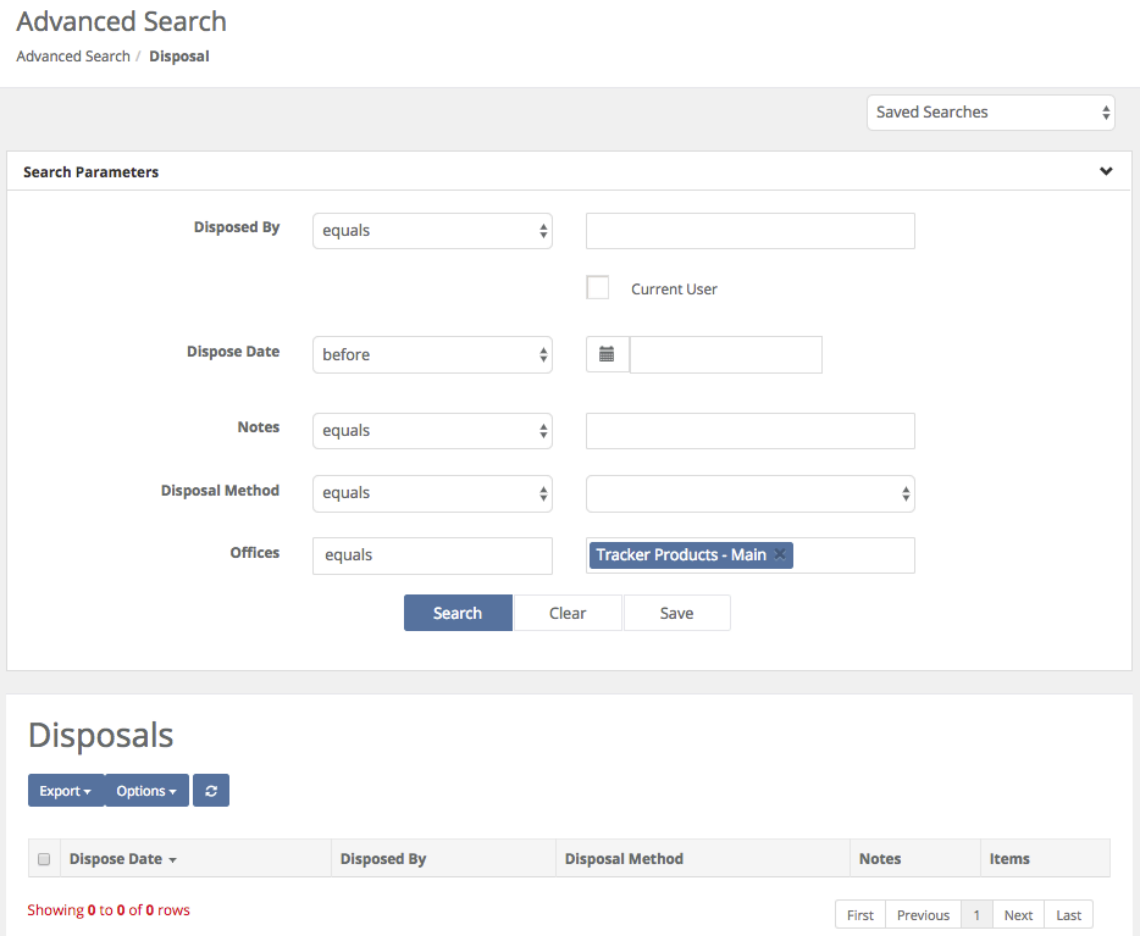
Quick Menu » Search \ Disposals

*Depending on your level of permissions, you may or may not be able to **Search** for **Disposals**.*
Click **Search** from the Quick Menu on the left hand side of the screen and select **Disposals**. This takes you to the **Advanced Search Disposal** screen. From here, you can customize the search parameters by selecting boxes with the two small triangles (on the right side of the box). Choose from a number of variables depending on what Disposal(s) you're searching for. When you are finished customizing your search criteria, click **Search**. This will show the **Disposals** you searched for.

You may now click the Export Box and make selections you would like to export to a comma separated value (.csv) file.

More information regarding **Searches** can be found by listening to our webinar:

SAFE Sessions 1 - Advanced Searching @
https://vimeo.com/202443717/e9eb495b03



Fields on the Advanced Search Disposal page

Disposed By

Click anywhere in the Disposed By field to bring up a list of options to choose from. Next, in the box to the right of the Disposed By field, type in a User for your search parameter.

Dispose Date

Click anywhere in the Dispose Date field to bring up a list of options to choose from. Next, in the calendar box to the right of the Disposed Date field, type in a date, or click the calendar icon and choose the Dispose Date you'd like.

Notes

Click anywhere in the Notes field to bring up a list of options to choose from. Next, in the box to the right of the Notes field, type in Notes for your search parameters.

Disposal Method

Click anywhere in the Disposal Method field to bring up a list of options to choose from. Next, in the box to the right of the Disposal Method field, click anywhere in the box to bring up a list of options to choose from such as Auctioned, or Released to Owner.

Offices

Click anywhere in the Offices field to bring up a list of options to choose from. Next, in the box to the right of the Offices field, type in an Office for your search parameter (your default office should already be listed).

Buttons on the Advanced Search Disposal page

Search

Once you have entered all of your parameters, click the Search button to search cases.

Clear

Click this button to reset all parameters.

Save

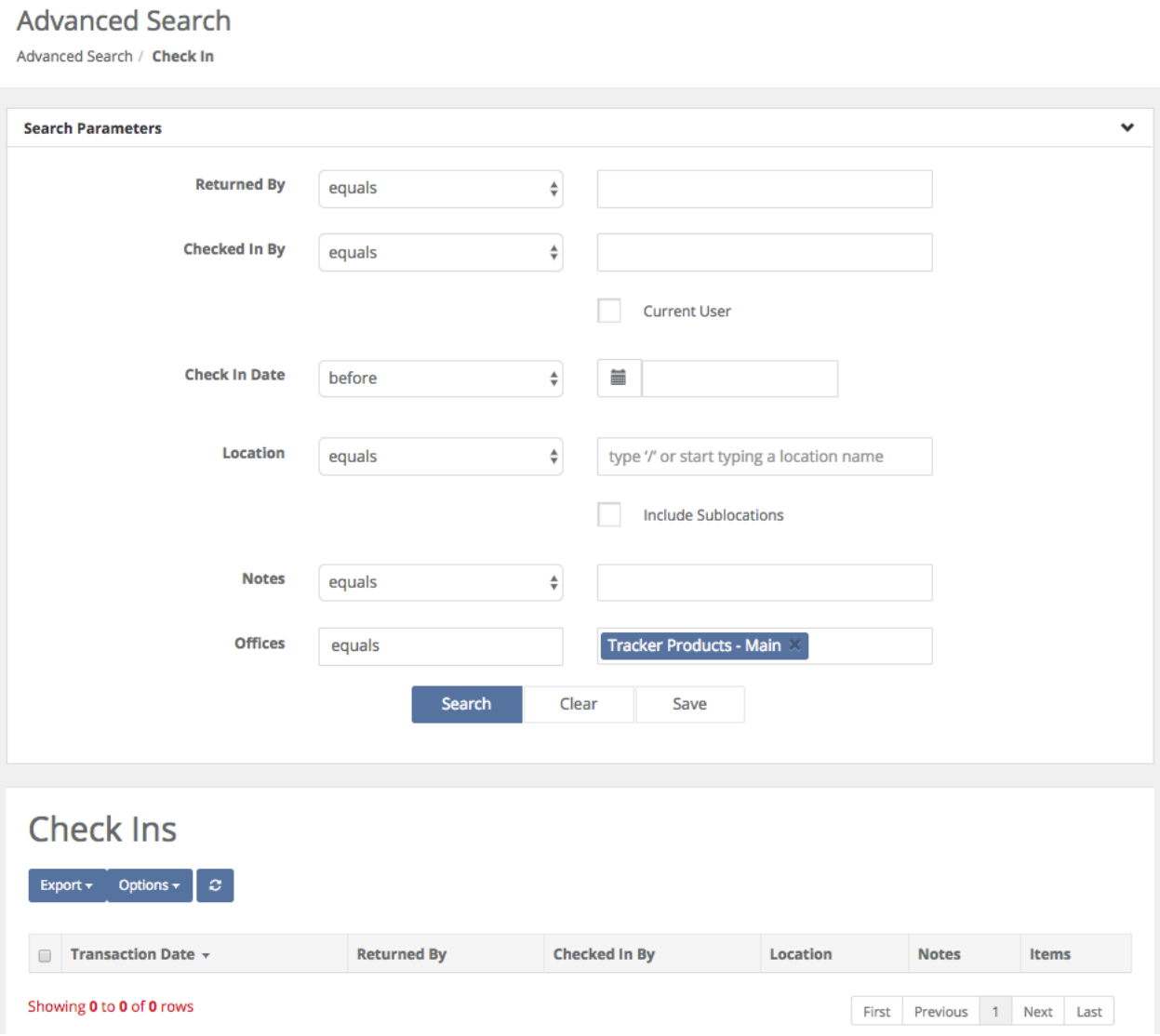
Click here to save a copy of the Search containing the parameters you've chosen.

Searching for Check Ins

Quick Menu » Search \ Check Ins

*Depending on your level of permissions, you may or may not be able to **Search** for **Check Ins**.*
Click **Search** from the Quick Menu on the left hand side of the screen and select **Check Ins**. This takes you to the **Advanced Search Check In** screen. From here, you can customize the search parameters by selecting boxes with the two small triangles (on the right side of the box). Choose from a number of variables depending on what Check In(s) you're searching for. When you are finished customizing your search criteria, click **Search**. This will show the **Check Ins** you searched for.

You may now click the Export Box and make selections you would like to export to a comma separated value (.csv) file.



Fields on the Advanced Search Check Ins page

Returned By

Click anywhere in the Returned By field to bring up a list of options to choose from. Next, in the box to the right of the Returned By field, type in a User for your search parameter.

Checked In By

Click anywhere in the Checked In By field to bring up a list of options to choose from. Next, in the box to the right of the Checked In By field, type in a User for your search parameter.

Check In Date

Click anywhere in the Check In Date field to bring up a list of options to choose from. Next, in the calendar box to the right of the Check In Date field, type in a date, or click the calendar icon and choose the Check In Date you'd like.

Location

Click anywhere in the Location field to bring up a list of options to choose from. Next, in the box to the right of the Location field, type in the Storage Location for your search parameter. You may click the checkbox to Include Sublocations in your search.

Notes

Click anywhere in the Notes field to bring up a list of options to choose from. Next, in the box to the right of the Notes field, type in Notes for your search parameters.

Offices

Click anywhere in the Offices field to bring up a list of options to choose from. Next, in the box to the right of the Offices field, type in an Office for your search parameter (your default office should already be listed).

Buttons on the Advanced Search Check In page

Search

Once you have entered all of your parameters, click the Search button to search cases.

Clear

Click this button to reset all parameters.

Save

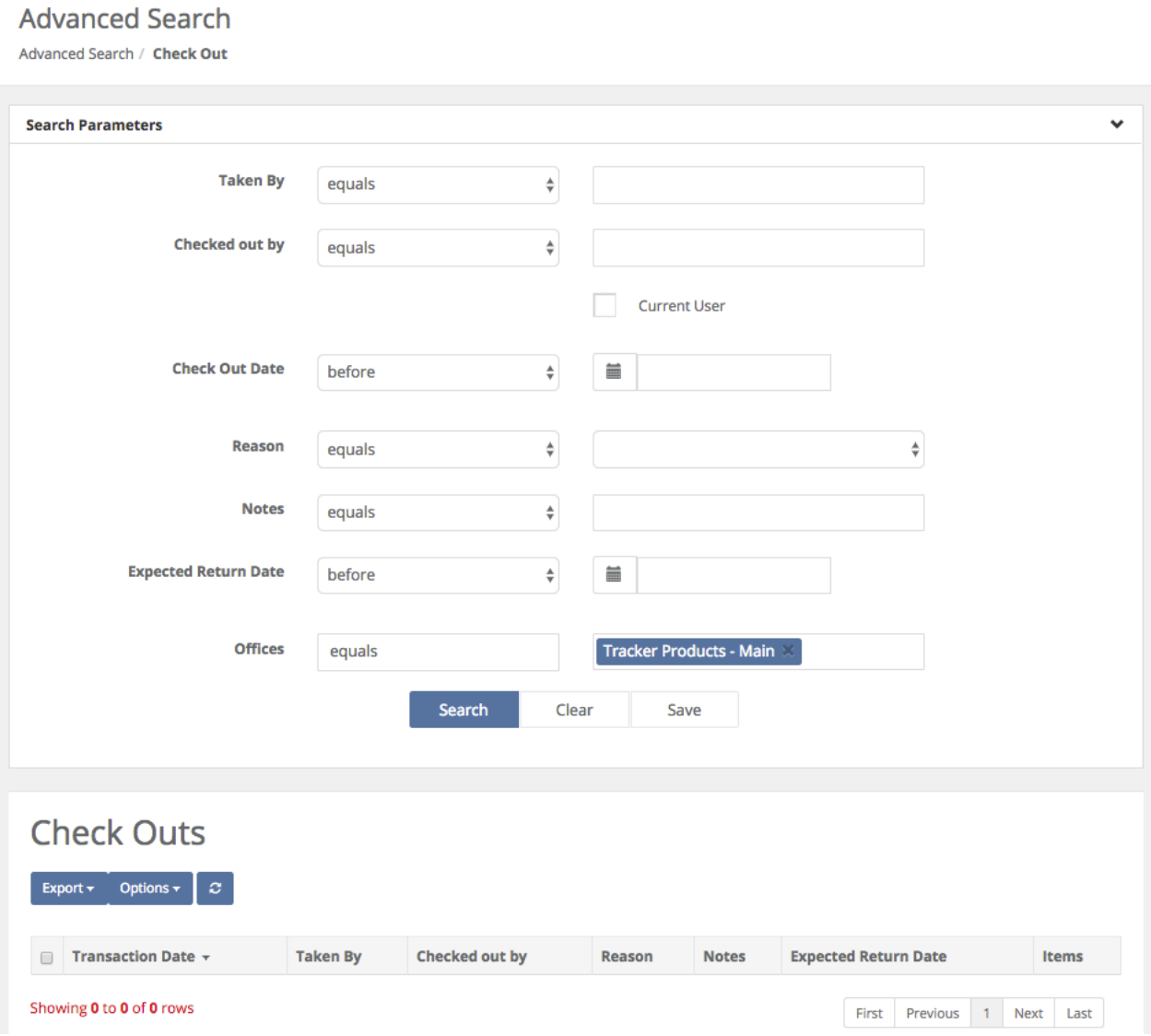
Click here to save a copy of the Search containing the parameters you've chosen.

Searching for Check Outs

Quick Menu » Search \ Check Out

*Depending on your level of permissions, you may or may not be able to **Search** for **Check Outs**.* Click **Search** from the Quick Menu on the left hand side of the screen and select **Check Outs**. This takes you to the **Advanced Search Check Out** screen. From here, you can customize the search parameters by selecting boxes with the two small triangles (on the right side of the box). Choose from a number of variables depending on what Check Out(s) you're searching for. When you are finished customizing your search criteria, click **Search**. This will show the **Check Outs** you searched for.

You may now click the Export Box and make selections you would like to export to a comma separated value (.csv) file.



Fields on the Advanced Search Check Out page

Taken By

Click anywhere in the Taken By field to bring up a list of options to choose from. Next, in the box to the right of the Taken By field, type in a User for your search parameter.

Checked Out By

Click anywhere in the Checked Out By field to bring up a list of options to choose from. Next, in the box to the right of the Checked Out By field, type in a User for your search parameter.

Check Out Date

Click anywhere in the Check Out Date field to bring up a list of options to choose from. Next, in the calendar box to the right of the Check Out Date field, type in a date, or click the calendar icon and choose the Check Out Date you'd like.

Reason

Click anywhere in the Reason field to bring up a list of options to choose from. Next, click anywhere in the box to the right of the Reason field, to bring up a list of options to choose from, such as Court or Lab etc.

Notes

Click anywhere in the Notes field to bring up a list of options to choose from. Next, in the box to the right of the Notes field, type in Notes for your search parameters.

Expected Return Date

Click anywhere in the Expected Return Date field to bring up a list of options to choose from. Next, in the calendar box to the right of the Expected Return Date field, type in a date, or click the calendar icon and choose the Expected Return Date you'd like.

Offices

Click anywhere in the Offices field to bring up a list of options to choose from. Next, in the box to the right of the Offices field, type in an Office for your search parameter (your default office should already be listed).

Buttons on the Advanced Search Check Out page

Search

Once you have entered all of your parameters, click the Search button to search cases.

Clear

Click this button to reset all parameters.

Save

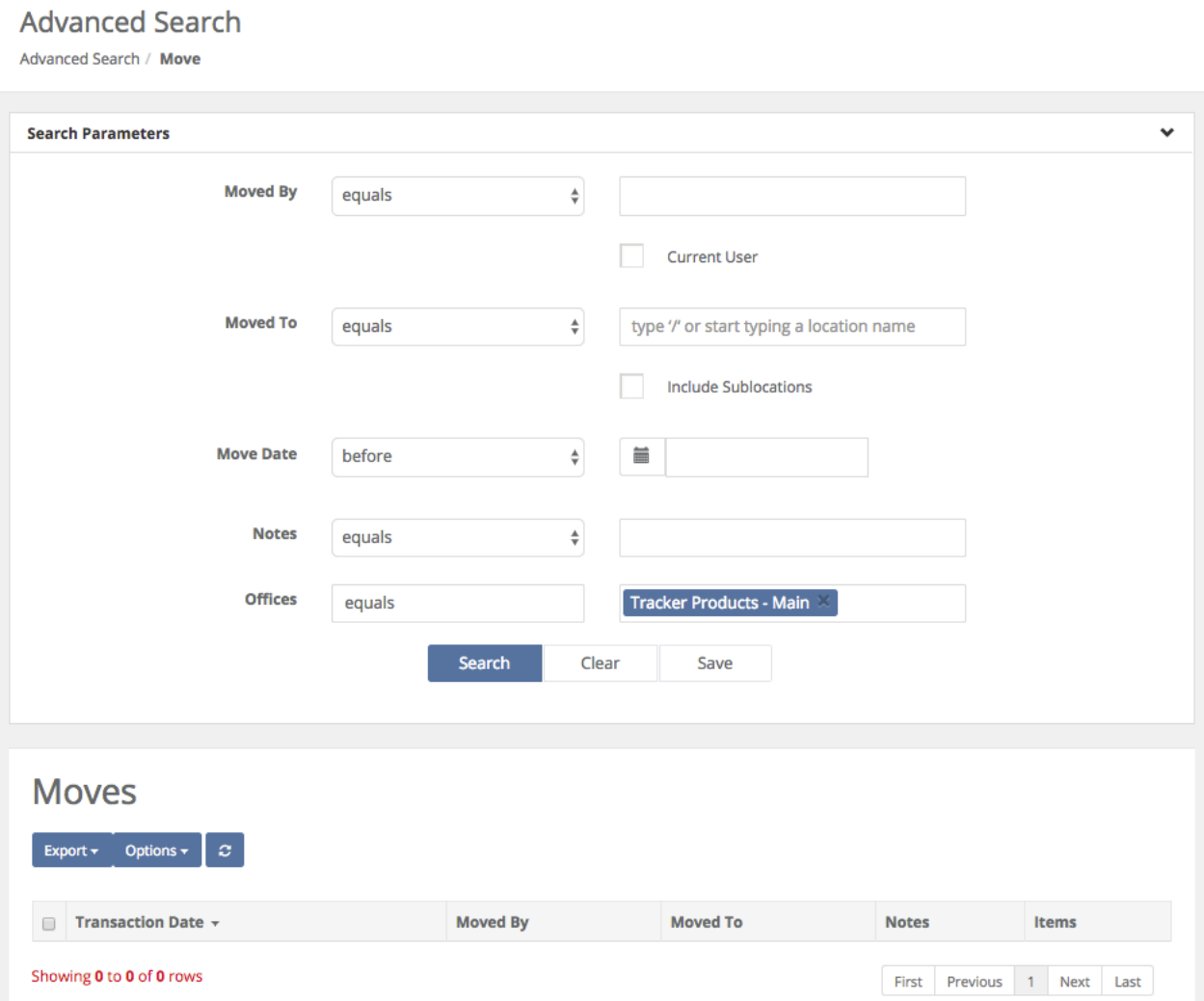
Click here to save a copy of the Search containing the parameters you've chosen.

Searching for Moves

Quick Menu » Search \ Moves

*Depending on your level of permissions, you may or may not be able to **Search** for **Moves**.*
Click **Search** from the Quick Menu on the left hand side of the screen and select **Moves**. This takes you to the **Advanced Search Move** screen. From here, you can customize the search parameters by selecting boxes with the two small triangles (on the right side of the box). Choose from a number of variables depending on what Move(s) you're searching for. When you are finished customizing your search criteria, click **Search**. This will show the **Moves** you searched for.

You may now click the Export Box and make selections you would like to export to a comma separated value (.csv) file.



Fields on the Advanced Search Move page

Moved By

Click anywhere in the Moved By field to bring up a list of options to choose from. Next, in the box to the right of the Moved By field, type in a User for your search parameter.

Moved To

Click anywhere in the Moved To field to bring up a list of options to choose from. Next, in the box to the right of the Moved To field, type in the Storage Location for your search parameter. You may click the checkbox to Include Sub-locations in your search.

Move Date

Click anywhere in the Move Date field to bring up a list of options to choose from. Next, in the calendar box to the right of the Move Date field, type in a date, or click the calendar icon and choose the Move Date you'd like.

Notes

Click anywhere in the Notes field to bring up a list of options to choose from. Next, in the box to the right of the Notes field, type in Notes for your search parameters.

Offices

Click anywhere in the Offices field to bring up a list of options to choose from. Next, in the box to the right of the Offices field, type in an Office for your search parameter (your default office should already be listed).

Buttons on the Advanced Search Move page

Search

Once you have entered all of your parameters, click the Search button to search cases.

Clear

Click this button to reset all parameters.

Save

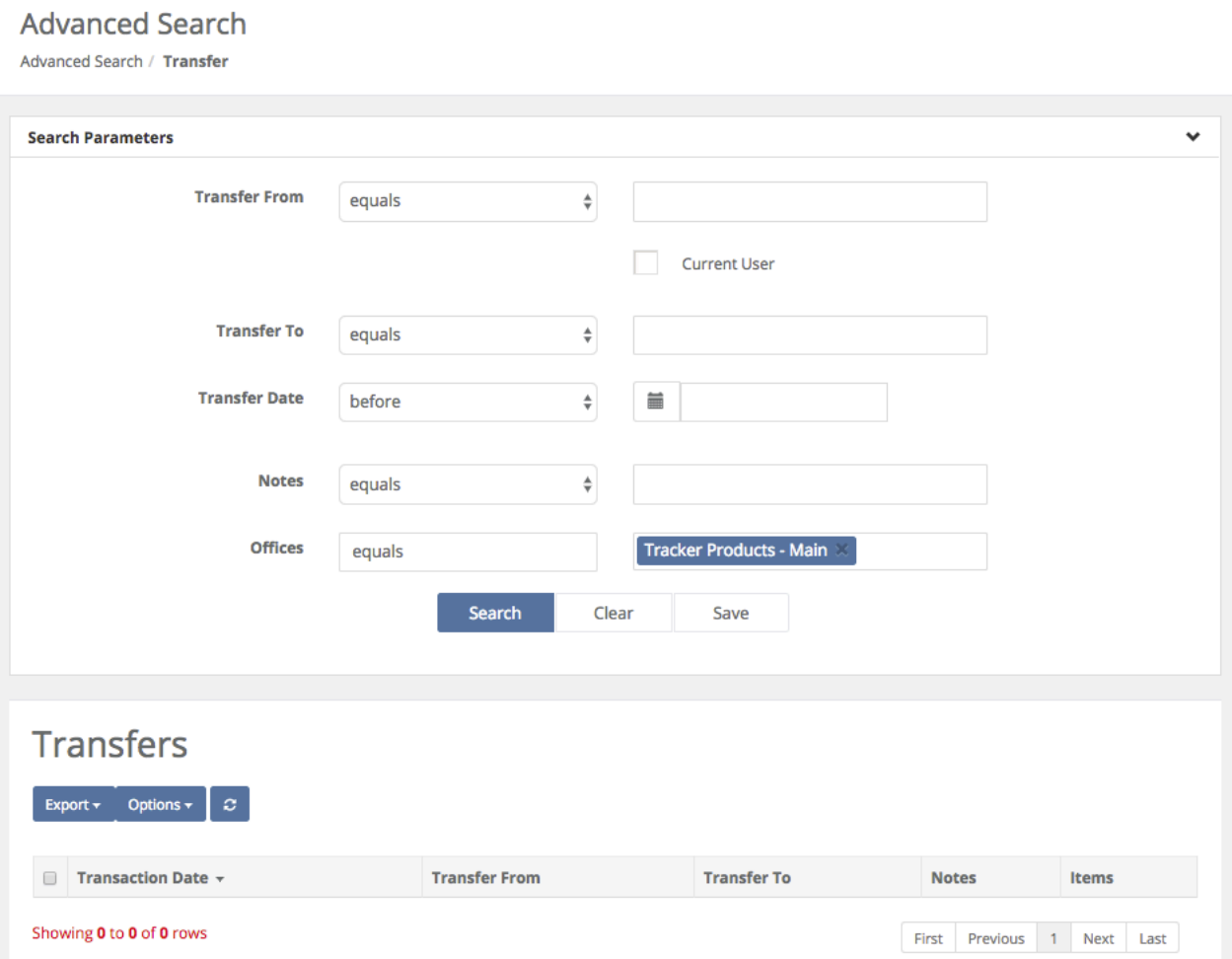
Click here to save a copy of the Search containing the parameters you've chosen.

Searching for Transfers

Quick Menu » Search \ Transfers

*Depending on your level of permissions, you may or may not be able to **Search** for **Transfers**.*
Click **Search** from the Quick Menu on the left hand side of the screen and select **Transfers**. This takes you to the **Advanced Search Transfer** screen. From here, you can customize the search parameters by selecting boxes with the two small triangles (on the right side of the box). Choose from a number of variables depending on what Transfer(s) you're searching for. When you are finished customizing your search criteria, click **Search**. This will show the **Transfers** you searched for.

You may now click the Export Box and make selections you would like to export to a comma separated value (.csv) file.



Fields on the Advanced Search Transfer page

Transfer From

Click anywhere in the Transfer From field to bring up a list of options to choose from. Next, in the box to the right of the Transfer From field, type in a User for your search parameter.

Transfer To

Click anywhere in the Transfer To field to bring up a list of options to choose from. Next, in the box to the right of the Transfer To field, type in a User for your search parameter.

Transfer Date

Click anywhere in the Transfer Date field to bring up a list of options to choose from. Next, in the calendar box to the right of the Transfer Date field, type in a date, or click the calendar icon and choose the Transfer Date you'd like.

Notes

Click anywhere in the Notes field to bring up a list of options to choose from. Next, in the box to the right of the Notes field, type in Notes for your search parameters.

Offices

Click anywhere in the Offices field to bring up a list of options to choose from. Next, in the box to the right of the Offices field, type in an Office for your search parameter (your default office should already be listed).

Buttons on the Advanced Search Transfer page

Search

Once you have entered all of your parameters, click the Search button to search cases.

Clear

Click this button to reset all parameters.

Save

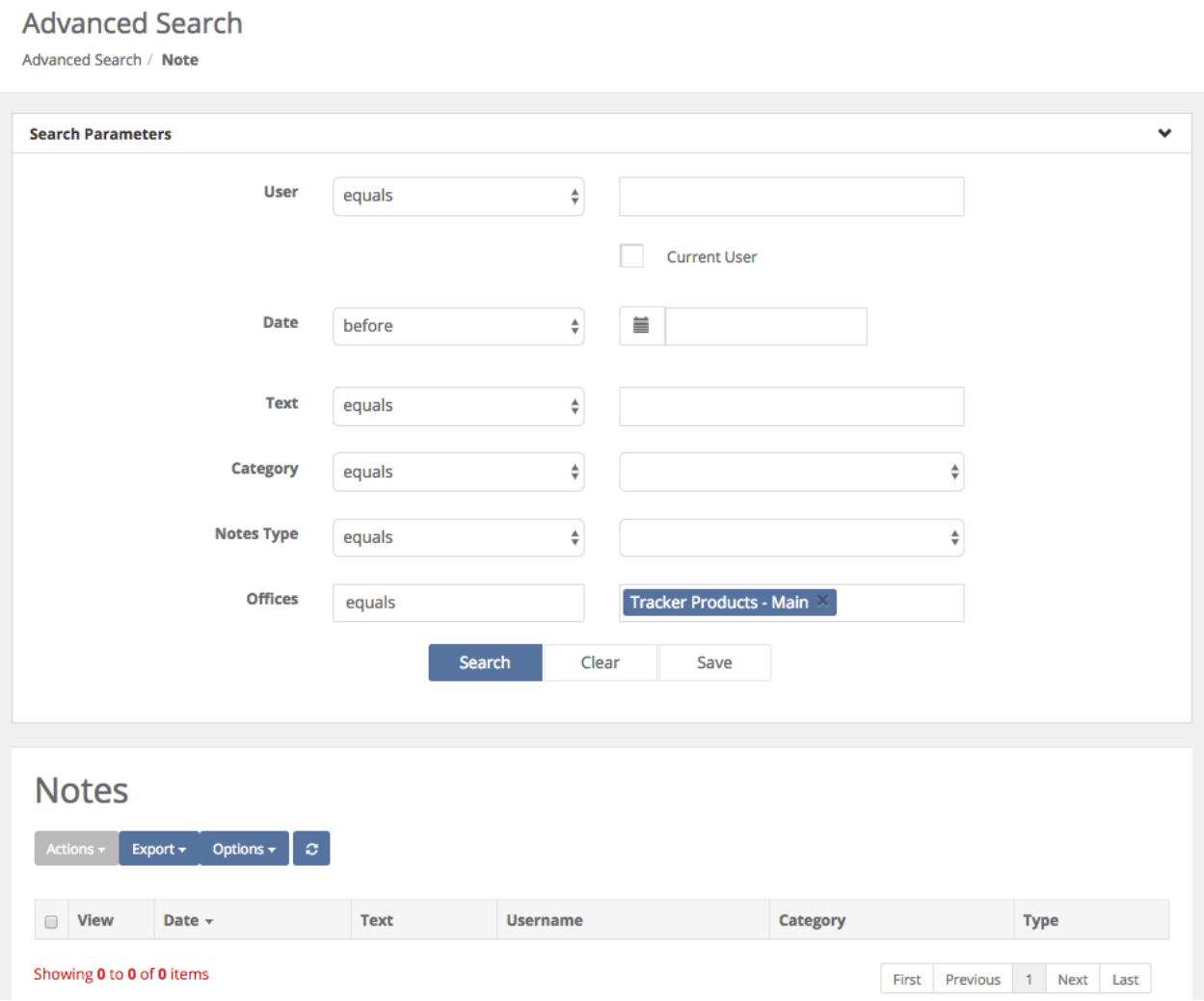
Click here to save a copy of the Search containing the parameters you've chosen.

Searching for Notes

Quick Menu » Search \ Notes

*Depending on your level of permissions, you may or may not be able to **Search** for **Notes**.* Click **Search** from the Quick Menu on the left hand side of the screen and select **Notes**. This takes you to the **Advanced Search Note** screen. From here, you can customize the search parameters by selecting boxes with the two small triangles (on the right side of the box). Choose from a number of variables depending on what Note(s) you're searching for. When you are finished customizing your search criteria, click **Search**. This will show the **Notes** you searched for.

You may now click the Export Box and make selections you would like to export to a comma separated value (.csv) file.



Fields on the Advanced Search Note page

User

Click anywhere in the User field to bring up a list of options to choose from. Next, in the box to the right of the User field, type in a User for your search parameter.

Date

Click anywhere in the Date field to bring up a list of options to choose from. Next, in the calendar box to the right of the Date field, type in a date, or click the calendar icon and choose the Date you'd like.

Text

Click anywhere in the Text field to bring up a list of options to choose from. Next, in the box to the right of the Text field, type in the text you would like to search for.

Category

Click anywhere in the Category field to bring up a list of options to choose from. Next, in the box to the right of the Category field, select the Category you would like to search for.

Notes Type

Click anywhere in the Notes Type field to bring up a list of options to choose from. Next, in the box to the right of the Notes Type field, choose a selection from the list of available choices for your search parameters.

Offices

Click anywhere in the Offices field to bring up a list of options to choose from. Next, in the box to the right of the Offices field, type in an Office for your search parameter (your default office should already be listed).

Buttons on the Advanced Search Note page

Search

Once you have entered all of your parameters, click the Search button to search cases.

Clear

Click this button to reset all parameters.

Save

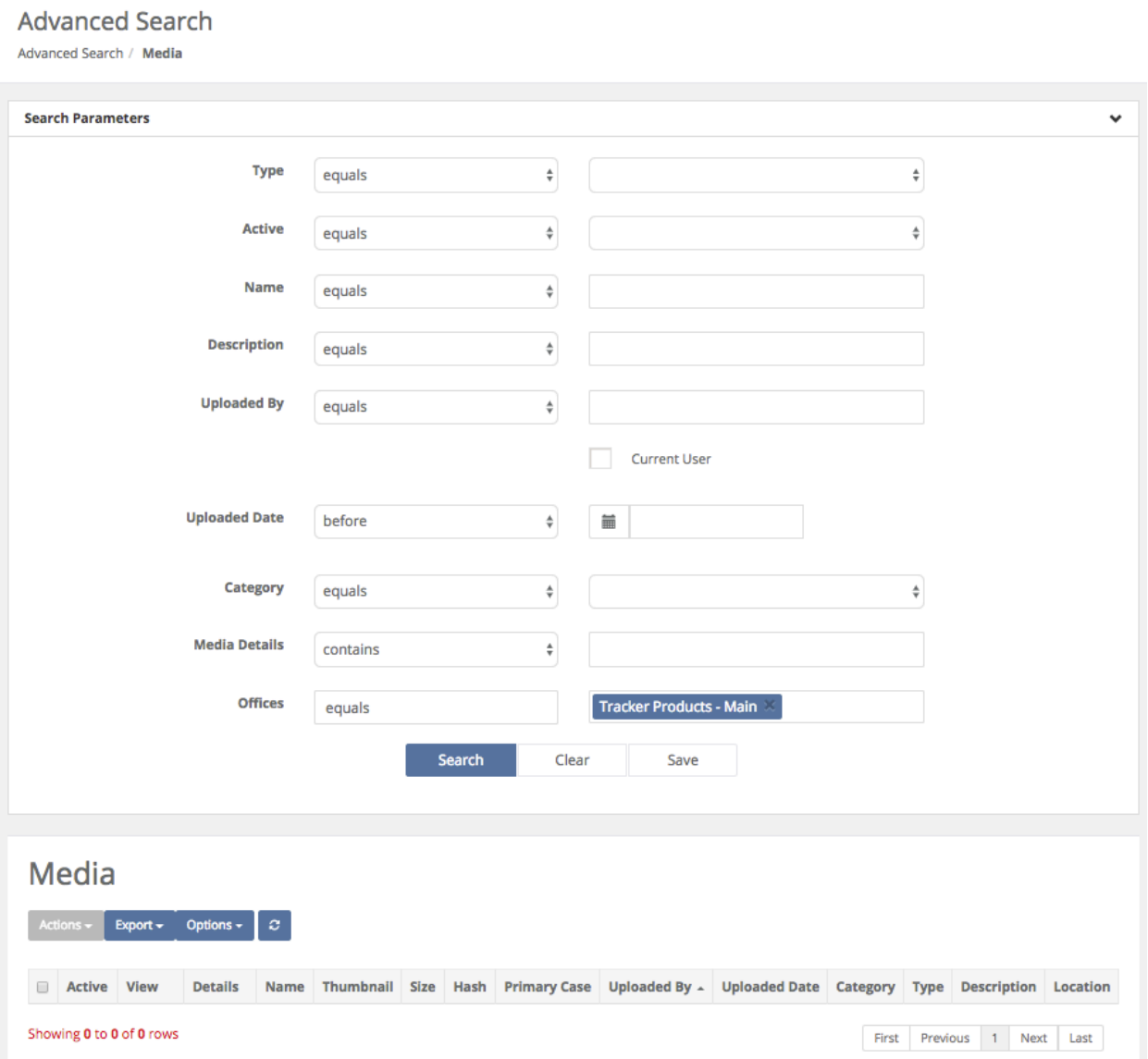
Click here to save a copy of the Search containing the parameters you've chosen.

Searching for Media

Quick Menu » Search \ Media

*Depending on your level of permissions, you may or may not be able to **Search** for **Media**.* Click **Search** from the Quick Menu on the left hand side of the screen and select **Media**. This takes you to the **Advanced Search Media** screen. Here you can customize the search parameters by selecting boxes with the two small triangles (on the right side of the box). Choose from a number of variables depending on what Media(s) you're searching for. When you are finished customizing your search criteria, click **Search**. This will show the **Media** you searched for.

You may now click the Export Box and make selections you would like to export to a comma separated value (.csv) file.



Fields on the Advanced Search Media page

Type

Click anywhere in the Type field to bring up a list of options to choose from. Next, in the box to the right of the Type field, select the Category the Media belongs to that you would like to search for (for example, does the Media relate to an Item or a Person etc.).

Active

Click anywhere in the Active field to bring up a list of options to choose from. Next, in the box to the right of the Active field, choose a selection from the list of available choices for your search parameters.

Name

Click anywhere in the Name field to bring up a list of options to choose from. Next, in the box to the right of the Name field, type in the Name of the Media you would like to search for.

Description

Click anywhere in the Description field to bring up a list of options to choose from. Next, in the box to the right of the Description field, type in a Description of the Media you would like to search for.

Uploaded By

Click anywhere in the Uploaded By field to bring up a list of options to choose from. Next, in the box to the right of the Uploaded By field, type in a User for your search parameter.

Uploaded Date

Click anywhere in the Uploaded Date field to bring up a list of options to choose from. Next, in the calendar box to the right of the Uploaded Date field, type in a date, or click the calendar icon and choose the Uploaded Date (of the Media) you'd like.

Category

Click anywhere in the Category field to bring up a list of options to choose from. Next, in the box to the right of the Category field, select the Category you would like to search for.

Media Details

Click anywhere in the Media Details field to bring up a list of options to choose from. Next, in the box to the right of the Media Details field, type Media Details you would like to search for.

Offices

Click anywhere in the Offices field to bring up a list of options to choose from. Next, in the box to the right of the Offices field, type in an Office for your search parameter (your default office should already be listed).

Buttons on the Advanced Search Media page

Search

Once you have entered all of your parameters, click the Search button to search cases.

Clear

Click this button to reset all parameters.

Save

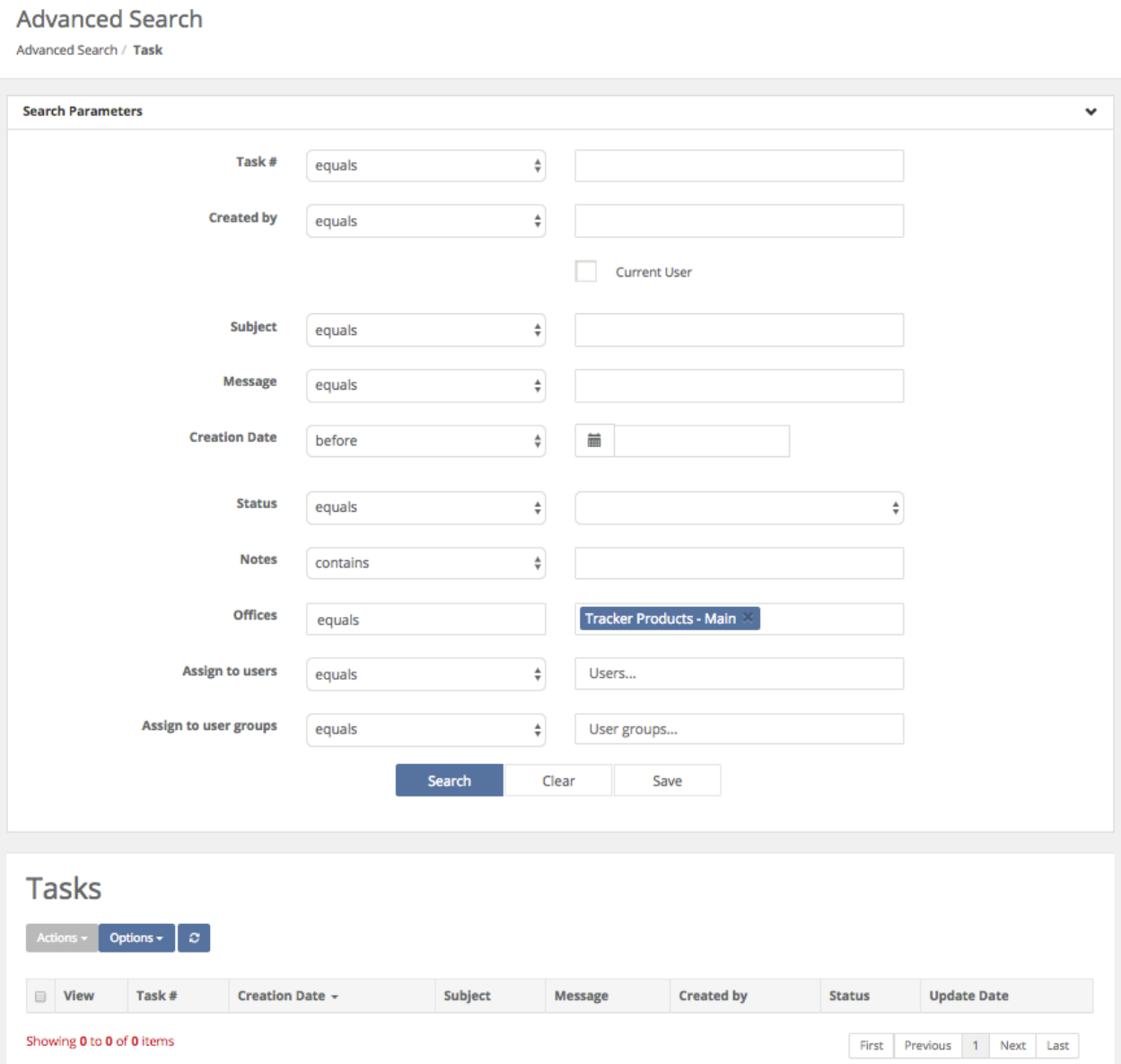
Click here to save a copy of the Search containing the parameters you've chosen.

Searching for Tasks

Quick Menu » Search \ Tasks

*Depending on your level of permissions, you may or may not be able to **Search** for **Tasks**.* Click **Search** from the Quick Menu on the left hand side of the screen and select **Tasks**. This takes you to the **Advanced Search Task** screen. Here you can customize the search parameters by selecting boxes with the two small triangles (on the right side of the box). Choose from a number of variables depending on what Task(s) you're searching for. When you are finished customizing your search criteria, click **Search**. This will show the **Task(s)** you searched for.

You may now click the Export Box and make selections you would like to export to a comma separated value (.csv) file.



Fields on the Advanced Search Task page

Task

Click anywhere in the Created by field to bring up a list of options to choose from. Next, in the box to the right of the Task # field, type in a Task #.

Created by

Click anywhere in the Created by field to bring up a list of options to choose from. Next, in the box to the right of the Created by field, type in a User for your search parameter.

Subject

Click anywhere in the Subject field to bring up a list of options to choose from. Next, in the box to the right of the Subject field, type in the Subject of the Task you would like to search for.

Message

Click anywhere in the Message field to bring up a list of options to choose from. Next, in the box to the right of the Message field, type the Message from the Task you would like to search for.

Creation Date

Click anywhere in the Creation Date field to bring up a list of options to choose from. Next, in the calendar box to the right of the Creation Date field, type in a date, or click the calendar icon and choose the Creation Date you'd like.

Status

Click anywhere in the Status field to bring up a list of options to choose from. Next, in the box to the right of the Status field, select the Status of the Task you would like to search for.

Notes

Click anywhere in the Notes field to bring up a list of options to choose from. Next, in the box to the right of the Notes field, type a Note from the Task you would like to search for.

Offices

Click anywhere in the Offices field to bring up a list of options to choose from. Next, in the box to the right of the Offices field, type in an Office for your search parameter (your default office should already be listed).

Assign to Users

Click anywhere in the Assign to Users field to bring up a list of options to choose from. Next, in the box to the right of the Assign to Users field, type Users the Task was assigned to.

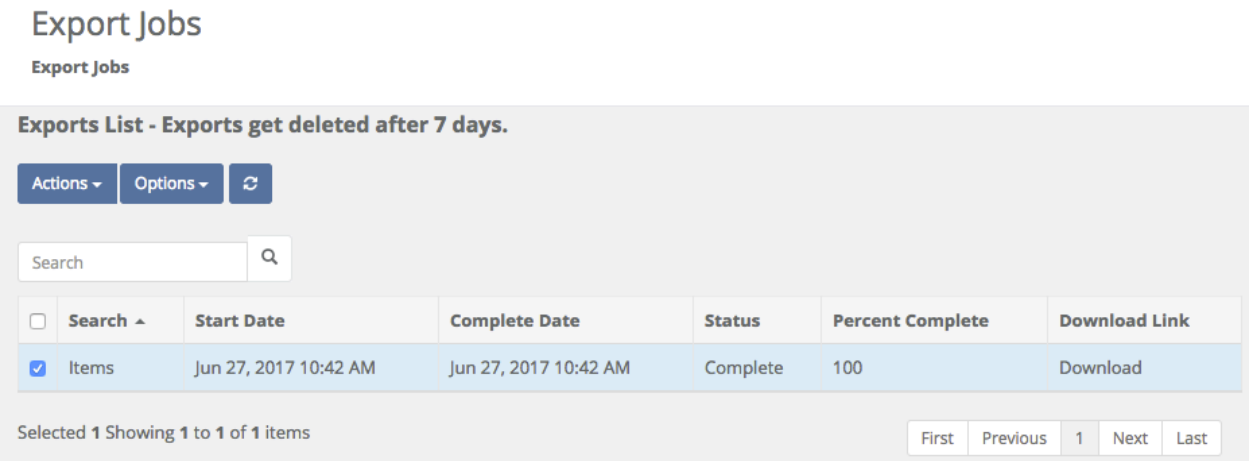
Assign to User Groups

Click anywhere in the Assign to User Groups field to bring up a list of options to choose from. Next, in the box to the right of the Assign to User Groups field, type the User Group the Task was assigned to.

Searching for Exported Searches

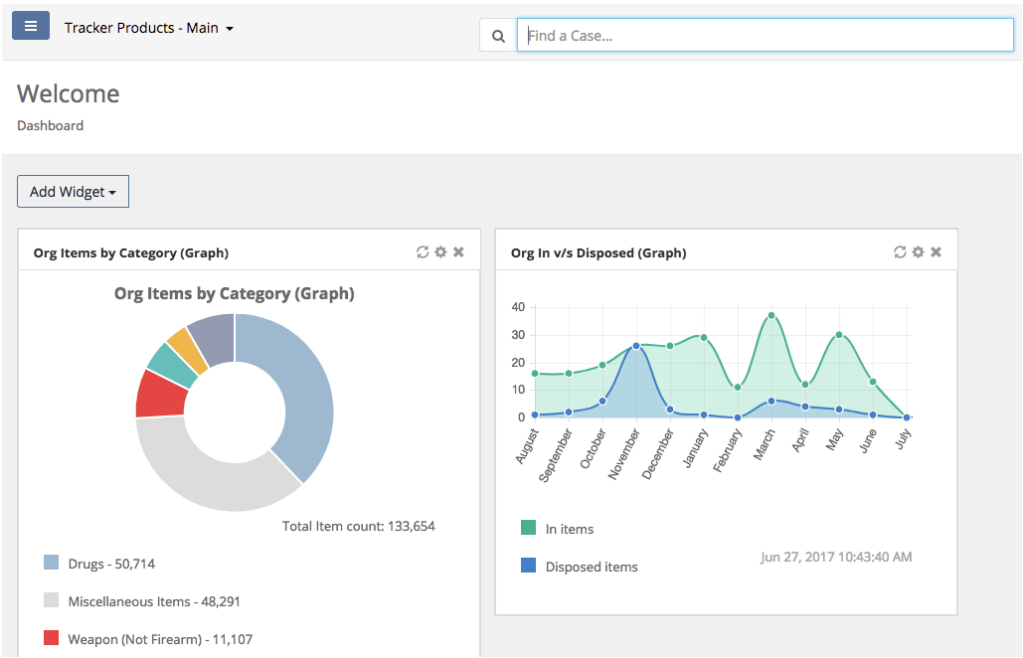
Quick Menu » Search \ Exported Searches

Click **Search** from the Quick Menu on the left hand side of the screen and select **Exported Searches**. This will take you to the **Export Jobs** screen. From here, you can export a search to a comma separated value (.csv) file by first highlighting the item you want, and then clicking the **Download** link.



Using Quick Search

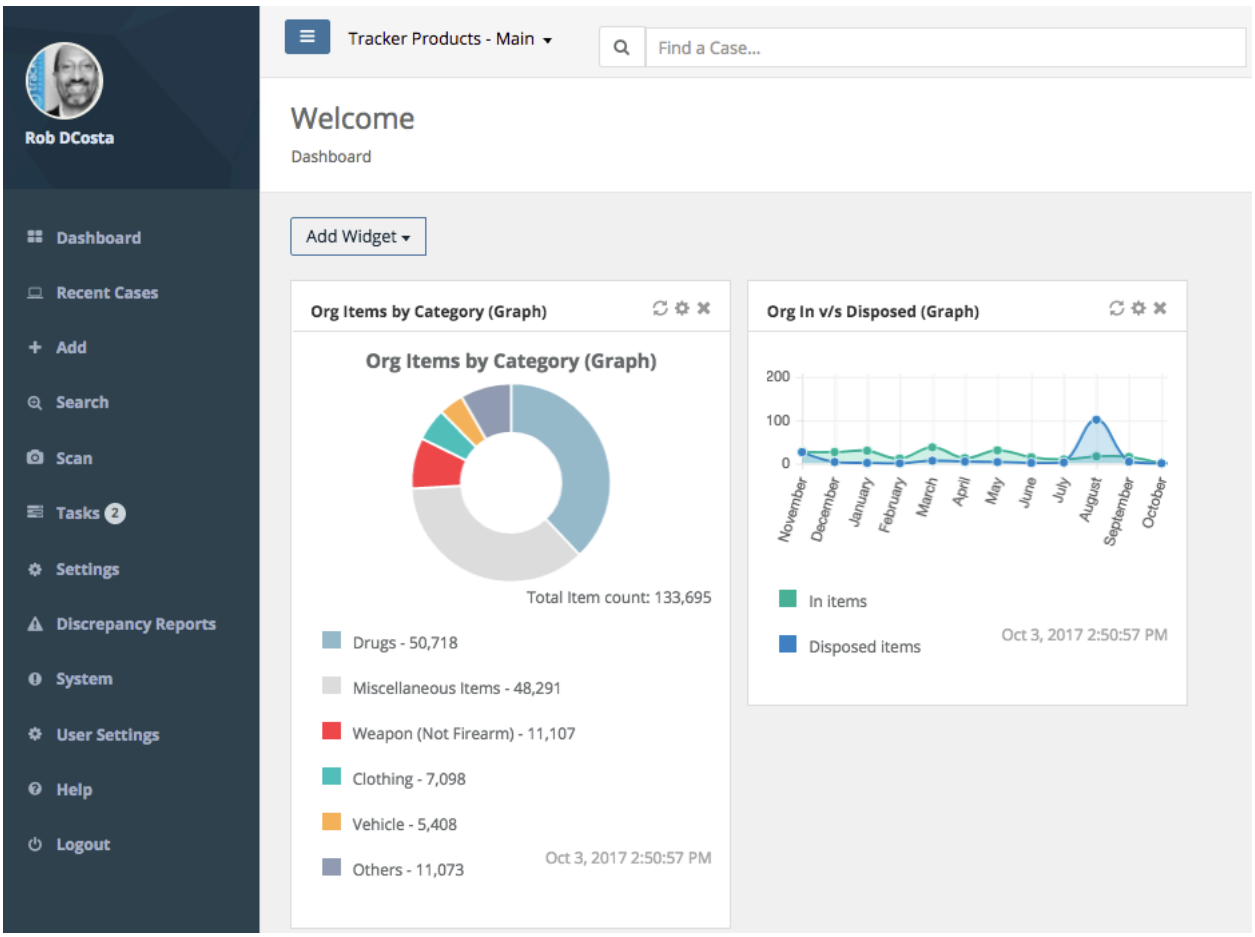
Once you've created all of your information in the system you may wish to use the Quick Search option to search for Cases. From the magnifying glass icon in the upper right hand corner of the screen, as soon as you start typing in the Find a [Case] field, a list of available options will appear for you to choose from.



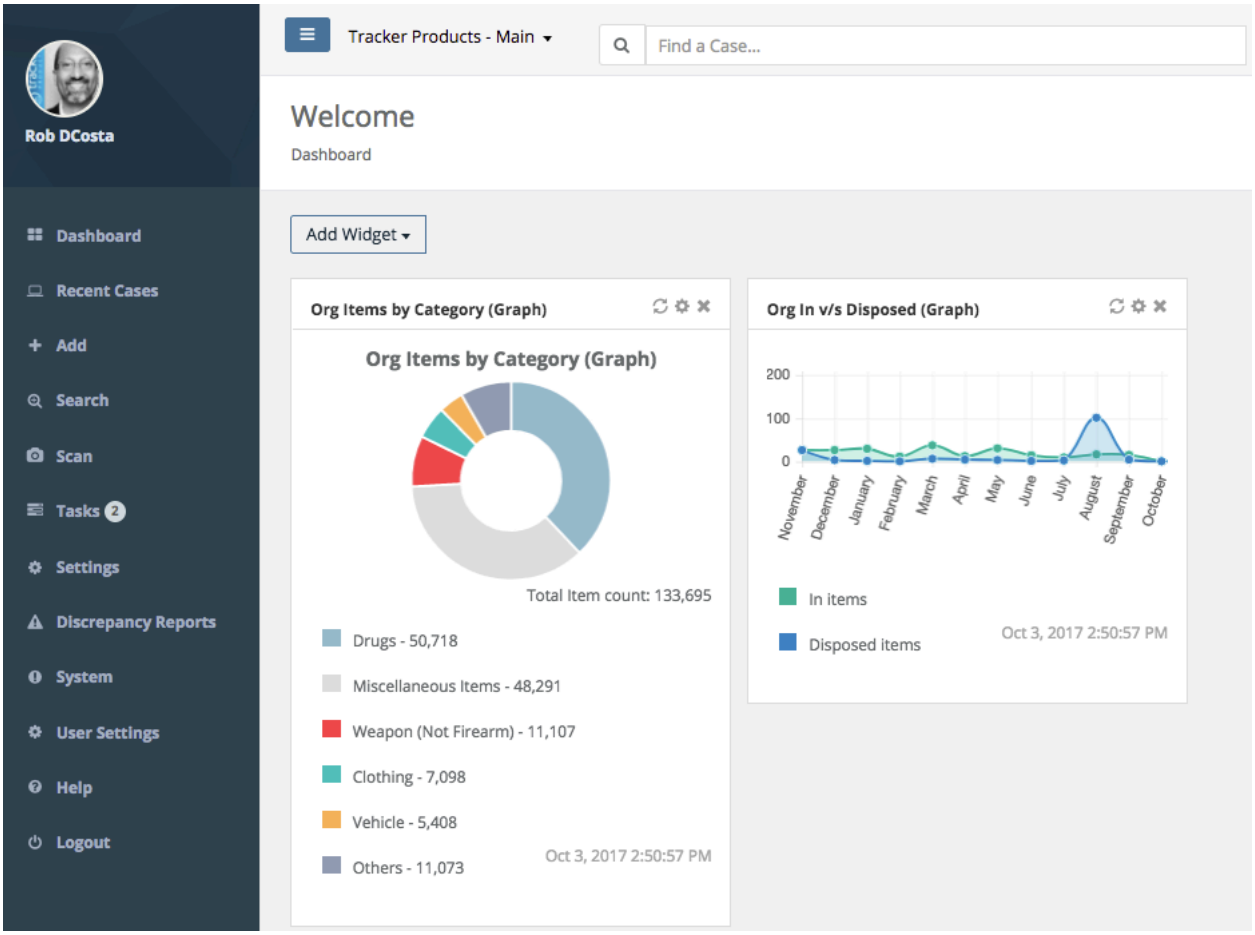
Dashboard Icon and Creating Widgets

Quick Menu » Dashboard

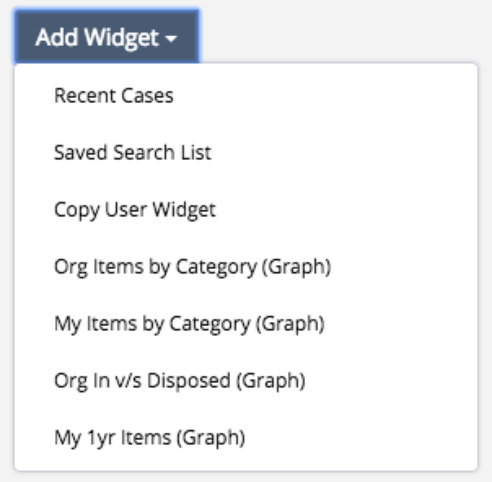
1. Click **Dashboard** from the Quick Menu on the left hand side of the screen. This will take you to the Dashboard screen you can personalize by creating **Widgets** (shortcuts relating to saved searches), or by copying **Widgets** that have already been created by other Users.



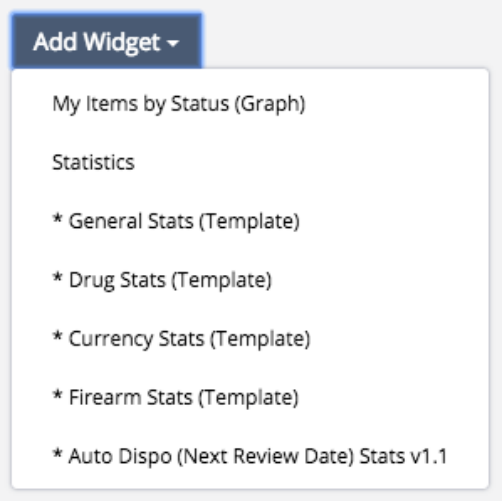
2. You can customize/personalize this screen with multiple **Widgets** (shortcuts relating to saved searches) that will save you time by minimizing the need to perform repeated searches. Click the **Add Widget** box, then select from the drop down menu of pre-made **Widgets** you want to add. You now have a personalized screen of **Widgets** (shortcuts/saved searches) to choose from. To 'refresh' a **Widget**, click the two arrows forming a circle in the **Widget** box. To rename a **Widget**, click the icon that looks like a star. Finally, to close a **Widget**, click the 'x' in the box of that particular **Widget**.



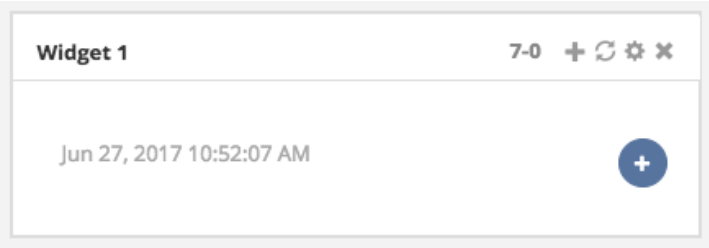
3. If none of the pre-made Widgets are what you require, you may create your own. From the **Dashboard** screen, do a **Search** on **Cases**, **Items**, or **People**. Enter your parameters and then click the **Save** box to **Save** that **Search**. Next, from your **Dashboard**, click the **Add Widget** box.



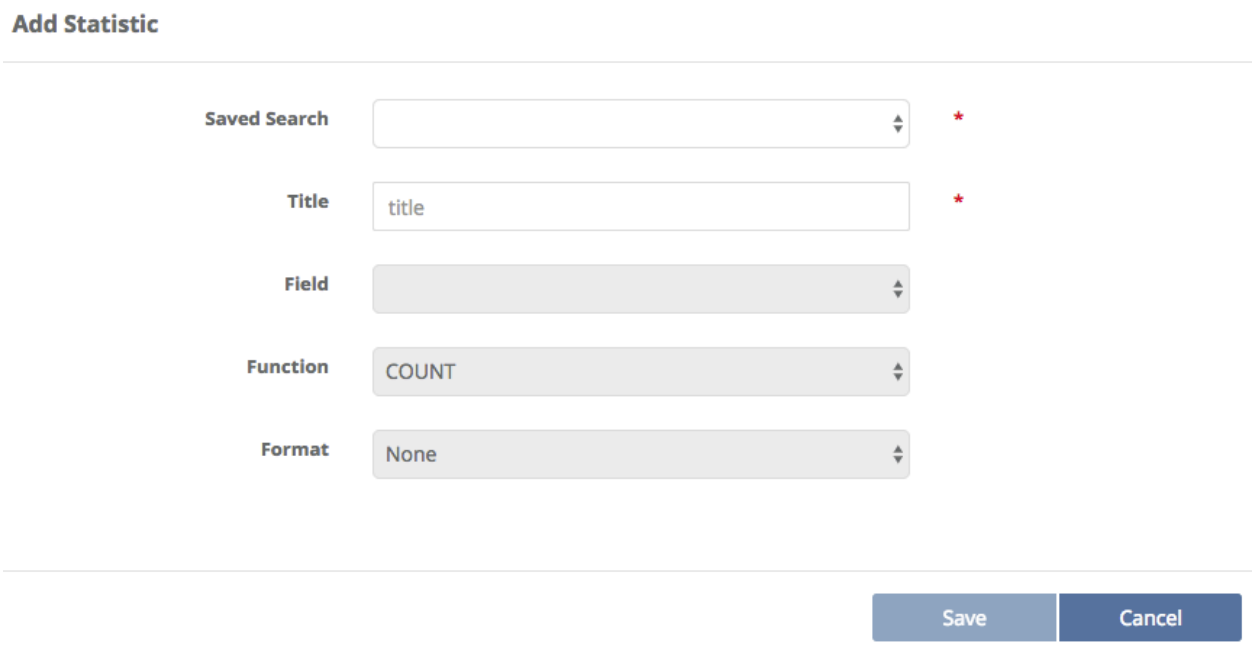
Then scroll down the list and click **Statistics**.



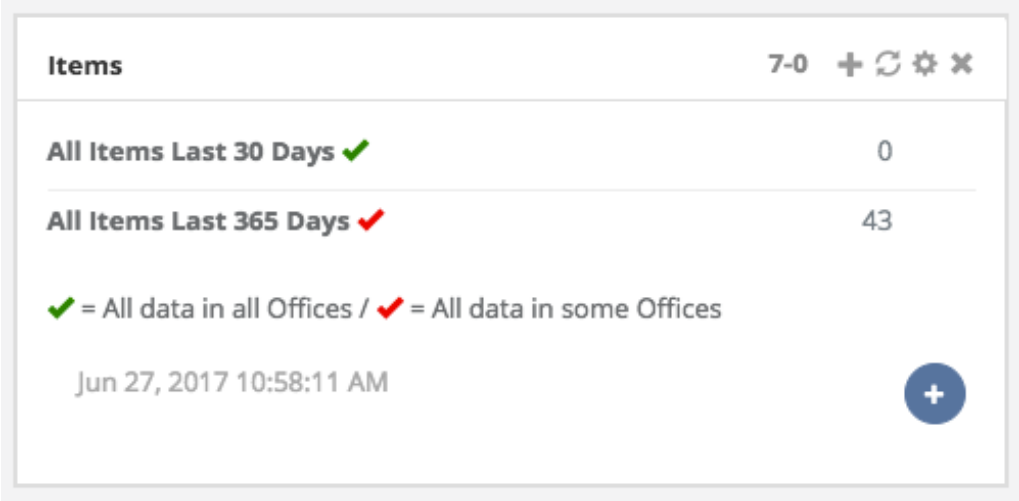
The Widget 1 box will then appear. Rename the **Widget 1** box by clicking the icon that looks like a star, then give it a name of your choosing.



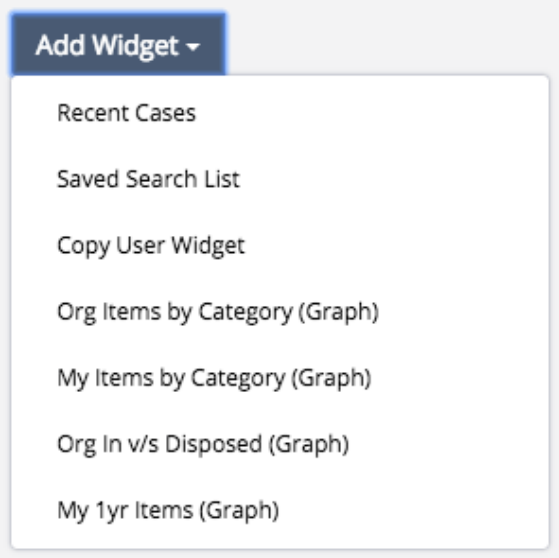
Next, click the blue circle with the plus symbol in it, and the **Add Statistic** page will appear.



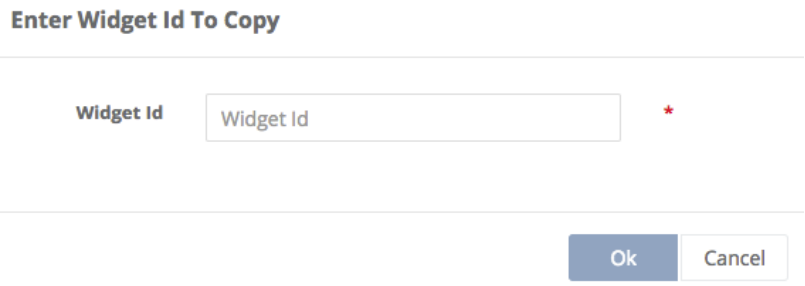
Give your **Statistic Widget** a **Title**. Next click the **Saved Search** box and choose from one of your saved searches. Then select a **Field**, **Function** and possibly **Format** and click **Save** (these will be auto-populated for you, so all you really need to do is click save). Your newly created **Widget** will then appear on your dashboard. A Green checkmark denotes you're seeing All **Offices** in your **Organization**. A Red checkmark denotes you're not seeing all **Offices** in your **Organization**.



4. Any User can copy another User's **Widgets** by clicking the **Add Widget** box on their **Dashboard**, then selecting **Copy User Widget**.

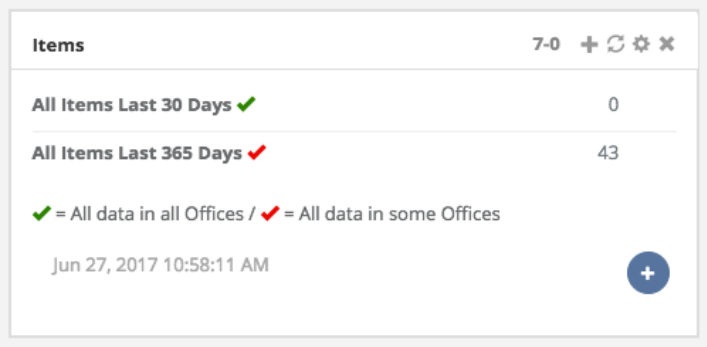


Next, enter the **Widget ID** located in the top right-hand corner of your **Widget** box, and click OK.



A copy of that User's **Widget** will then be on the **Dashboard**.

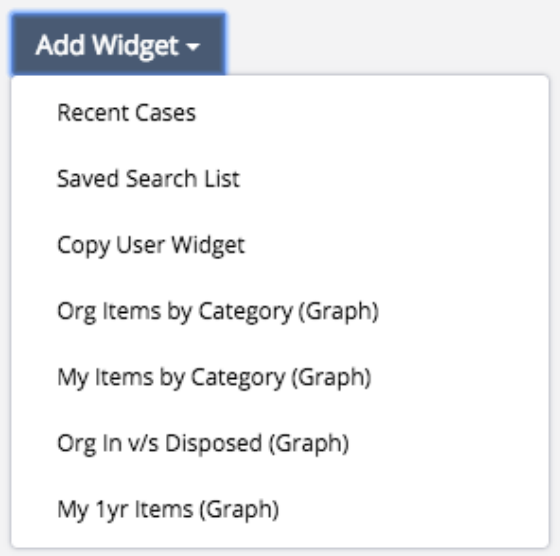
5. Initially, a Widget is rather wide. To 'scrunch' your Widget, put your mouse cursor over the right edge of the Widget (until you see the double arrow <->), then click and drag to the left. Your widget will then be smaller, allowing you to place more of them in the same space.



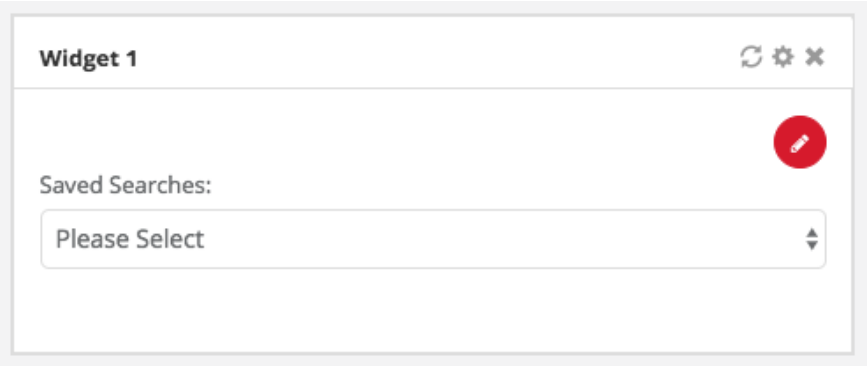
Deleting Saved Searches

Quick Menu » Dashboard

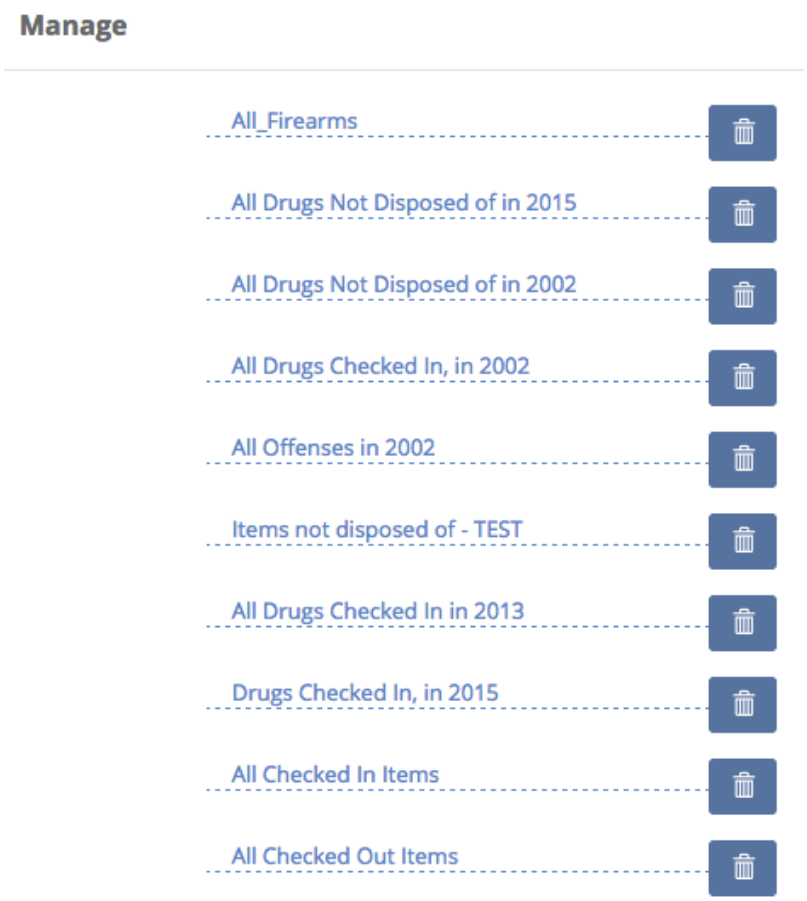
1. Click **Dashboard** from the Quick Menu on the left hand side of the screen. This will take you to the Dashboard screen. Next, click the **Add Widget** box and select **Saved Search List.**



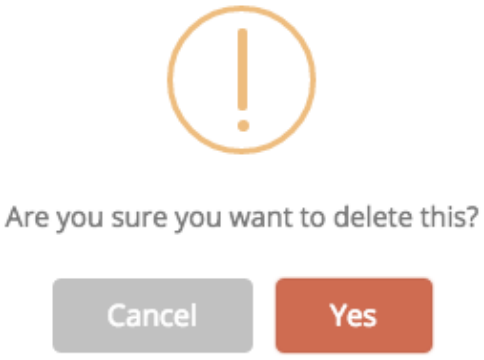
A widget will then be created on your **Dashboard** screen which contains all of your **Saved Searches**.



Click the red circle (with a pencil in it) on the **Saved Searches** widget you just created. Doing this will bring up your entire list of **Saved Searches**, which you may now manage. To delete a Saved Search you are no longer using, simply click the garbage can next to it.



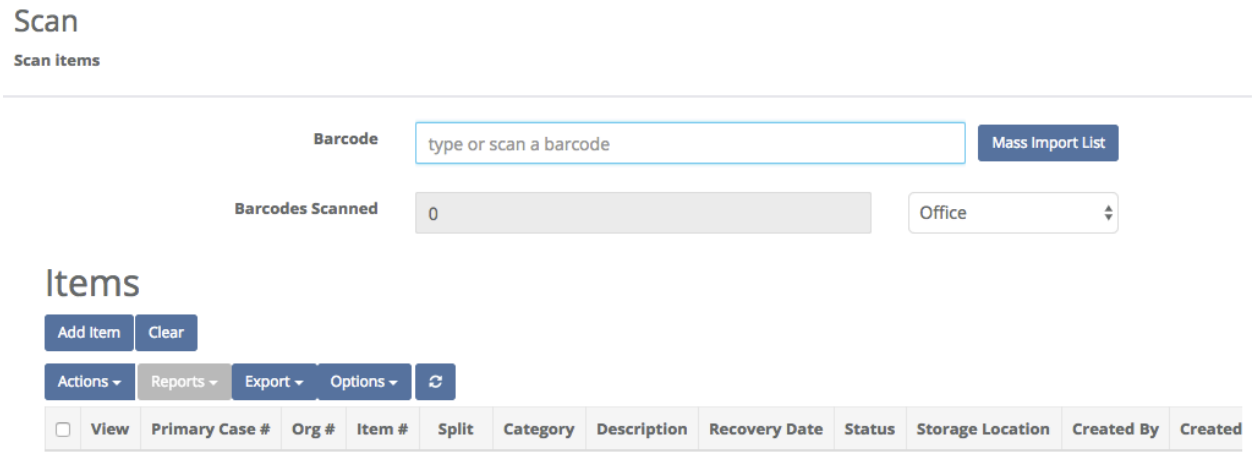
The system will then ask if you're sure you want to delete the search. If you are, click Yes and the search will be deleted.



Scan Icon

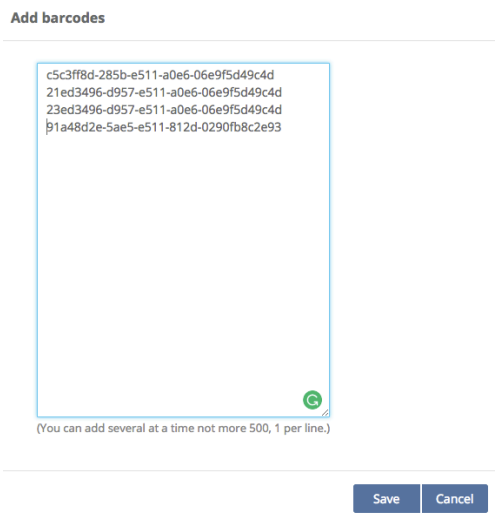
Quick Menu » Scan

Click **Scan** from the Quick Menu on the left hand side of the screen. This will take you to the **Scan Items** screen. You may **Scan Item(s)** or manually enter a barcode(s). The software will let you know how many items you have scanned so far. From the Scan screen, once you have scanned your Items, you can do a **Mass Disposal of Items** – Drugs for example, or you could **Check Out** numerous Items at once. Simply click the **Actions** box and make a selection.



Note: If all columns aren't visible, you may either remove some via the Options Box or scroll to the right with your mouse to view them.

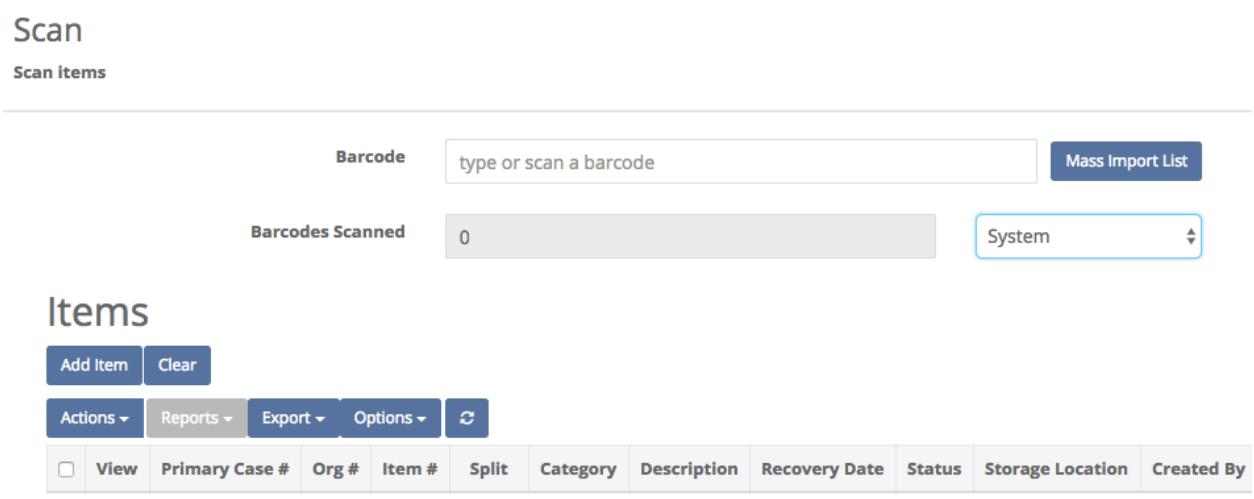
Click **Mass Import List** to bring up a text area box you can now paste a large quantity of barcodes into for mass population of the Scan screen.



Save this list to have the barcodes populated.

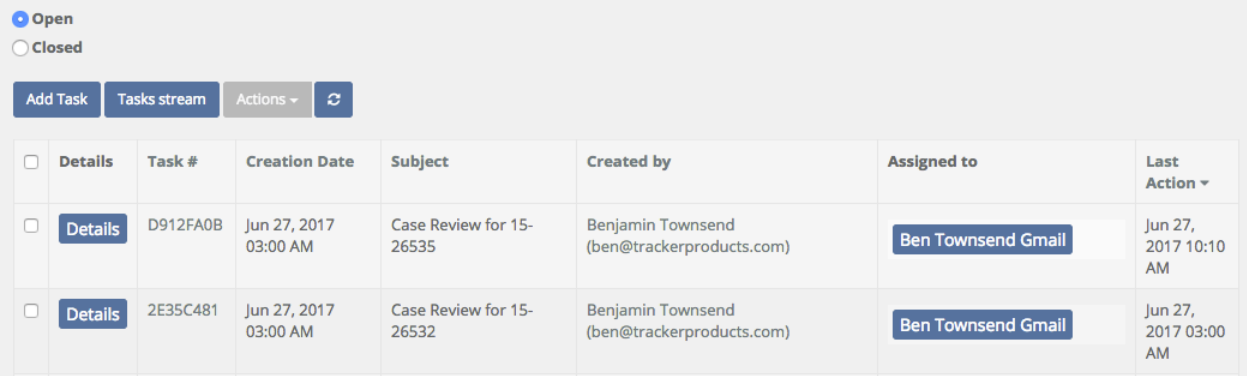
Scanning Items from another Office or Organization

In the **Scan** area, you may also **Check an Item Out** from one Office or Org and **Check that Item into** another Office or Org. To do that, first Check out an Item. Next switch Offices or Orgs then go to the Scan area. If that Item is from another Office or Org, to the right of Barcodes Scanned, select System from the selectable list. You may then type or Scan the Barcode(s) of the Item(s).



Tasks

Quick Menu » Tasks

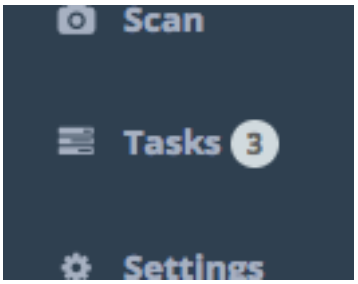


The SAFE Task system allows users within the software to communicate with other system users. The key feature being that all communication takes place within the software, where it can be tracked to a Case or Item, instead of outside of the system where communication is not documented for further review.

Typical Scenario:

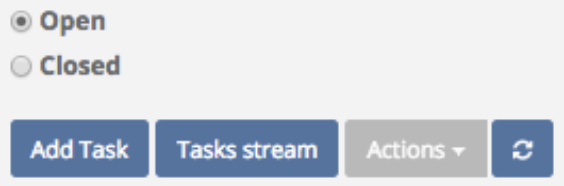
1. User A needs information from User B.
2. User A initiates a system Task.
3. User A fills in the task screen with information such as who the task is for (User B) along with a subject line and description.
4. Upon submission User B will receive an email indicating that they have received a task from User A with a link back to the system.
5. User B will login to the system and supply the requested information about the task.
6. User A will receive a return email indicating that a response has been posted. User A can then respond to the task or close the task.

Tasks Menu Option

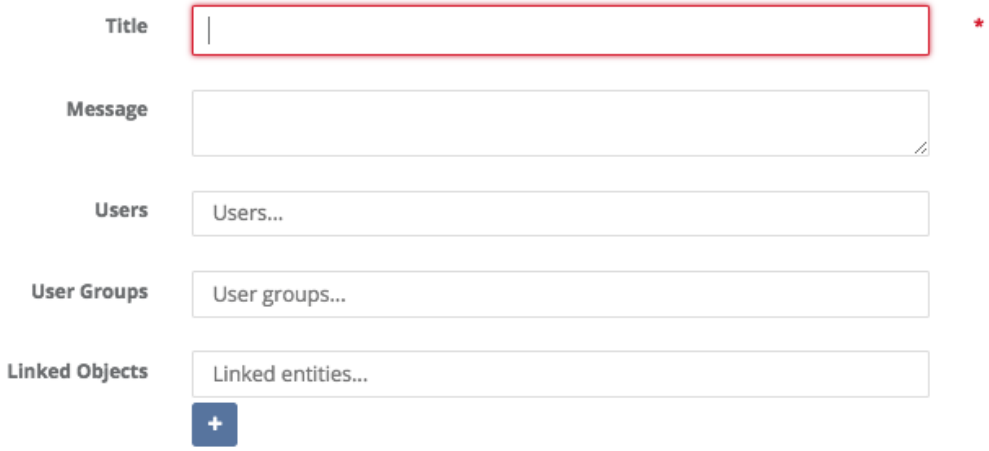


The menu bar (on the left) will have a link to the Tasks page along with a (#) that shows how many open tasks are assigned to you or in a group that you are a part of. Click on either of these options and you will be directed to the Tasks page.

Creating a Task

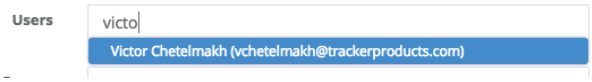


Click the ‘Add Task’ button to begin to generate a Task.



Title & Message – This is sort of like a Subject and Message for an email message. Fill in a Title (Subject) and message for the user or group you are going to assign the Task.

User – Begin to type the name or email of a user you want to get the Task.



As you begin to type a name the options for that name will come up below.

User Groups – If you want to assign a Task to a group of users you will type in the name of the group here.

> *Note: If you are a Org Admin you can setup these groups in Settings > User Groups.*
>
> *Note 2: Tasks can be generated for a user or group but must contain at least one user or group.*

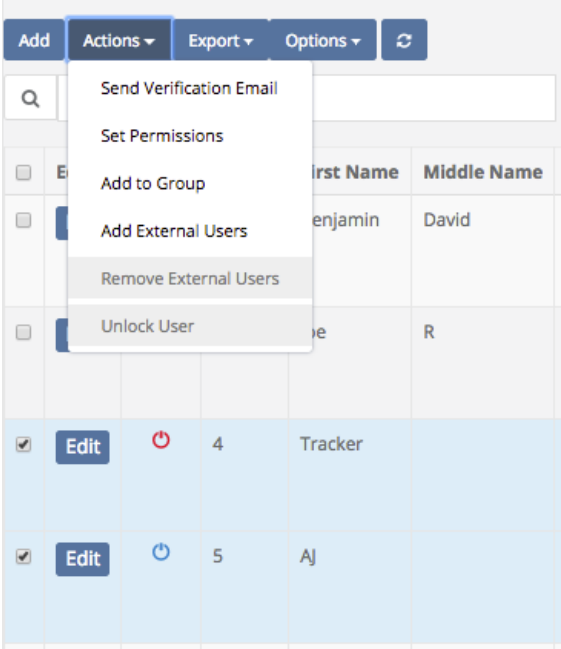
Linked Object – This is where you can associate a Task with a Case(s), Person(s) or Item(s).

User Groups

Quick Menu » Settings \ User Groups

User groups are for assigning tasks to Groups of users. When a task is assigned to a group, all users in the group will get the task along with a notification email.

To add users to the group, go to Settings > User Admin. Select the users for the group and go to Actions > Add to Group.

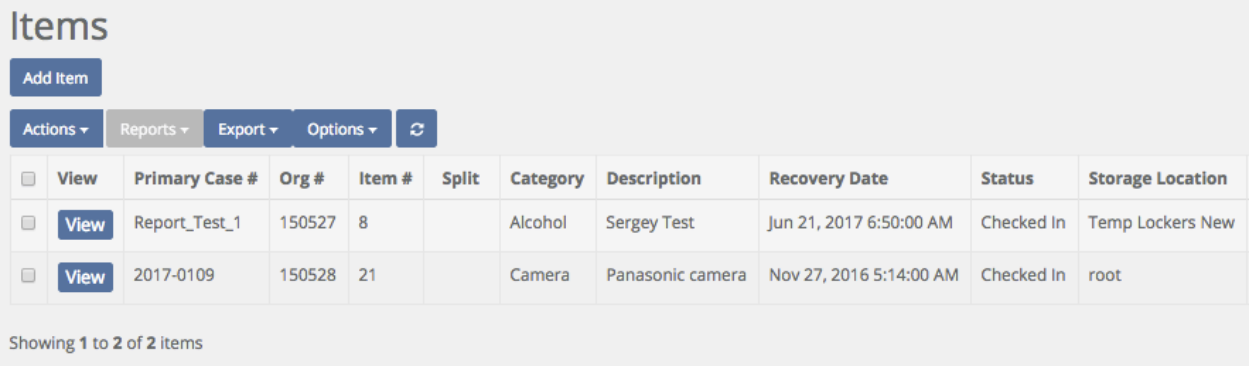


Users that are a part of a group will be shown in the User grid under the heading User Groups.

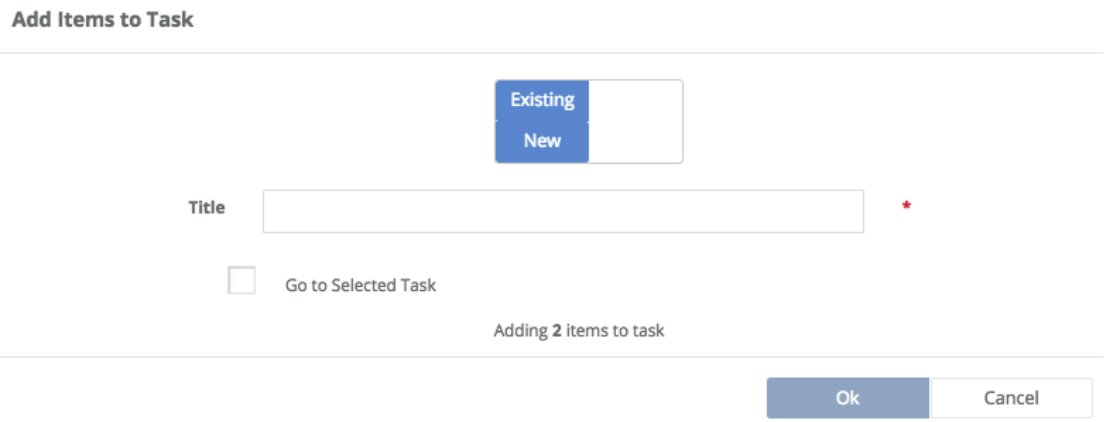
Adding a Case, Person or Item from Menu

While you can add a Case, Person or Item to a Task from within the Task creation screen, the far better option is to add these from their respective search pages.

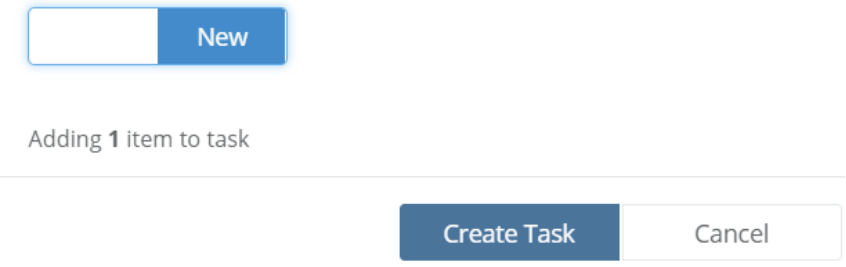
Go to Search > Items. Search for all items entered in the last 10 days (assuming you have some items in this search). Search for the list of results.



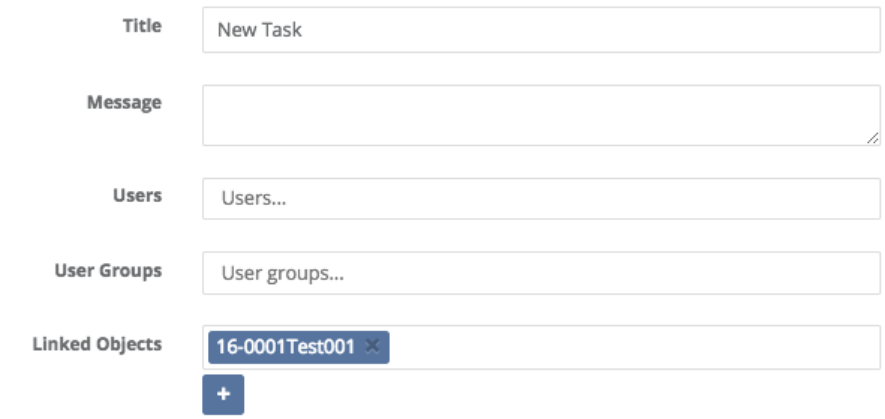
Now that I have a list of results, select all the items in this list and go to Actions > Add to Task



There is a slider on the top to add these items to an existing task or to create a new task. Click the slider for New.

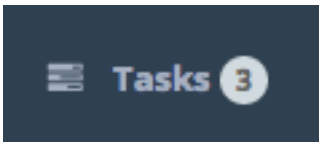


Click Create Task.

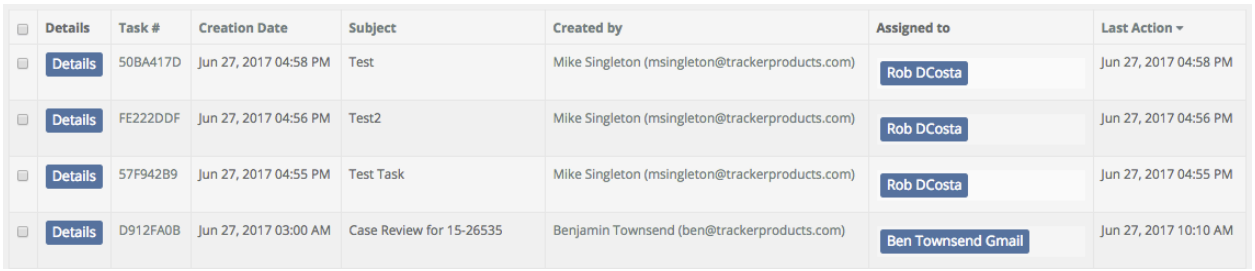


You are now redirected to the Task entry screen but all of your items are now in the list. *Note: You can complete the same results by searching for Cases or Persons and adding to a Task.*

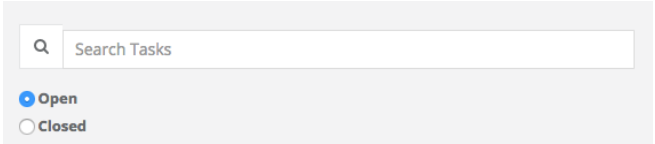
Viewing a Task



Clicking on the Task menu on the left side of the screen will take you into the Tasks display area.

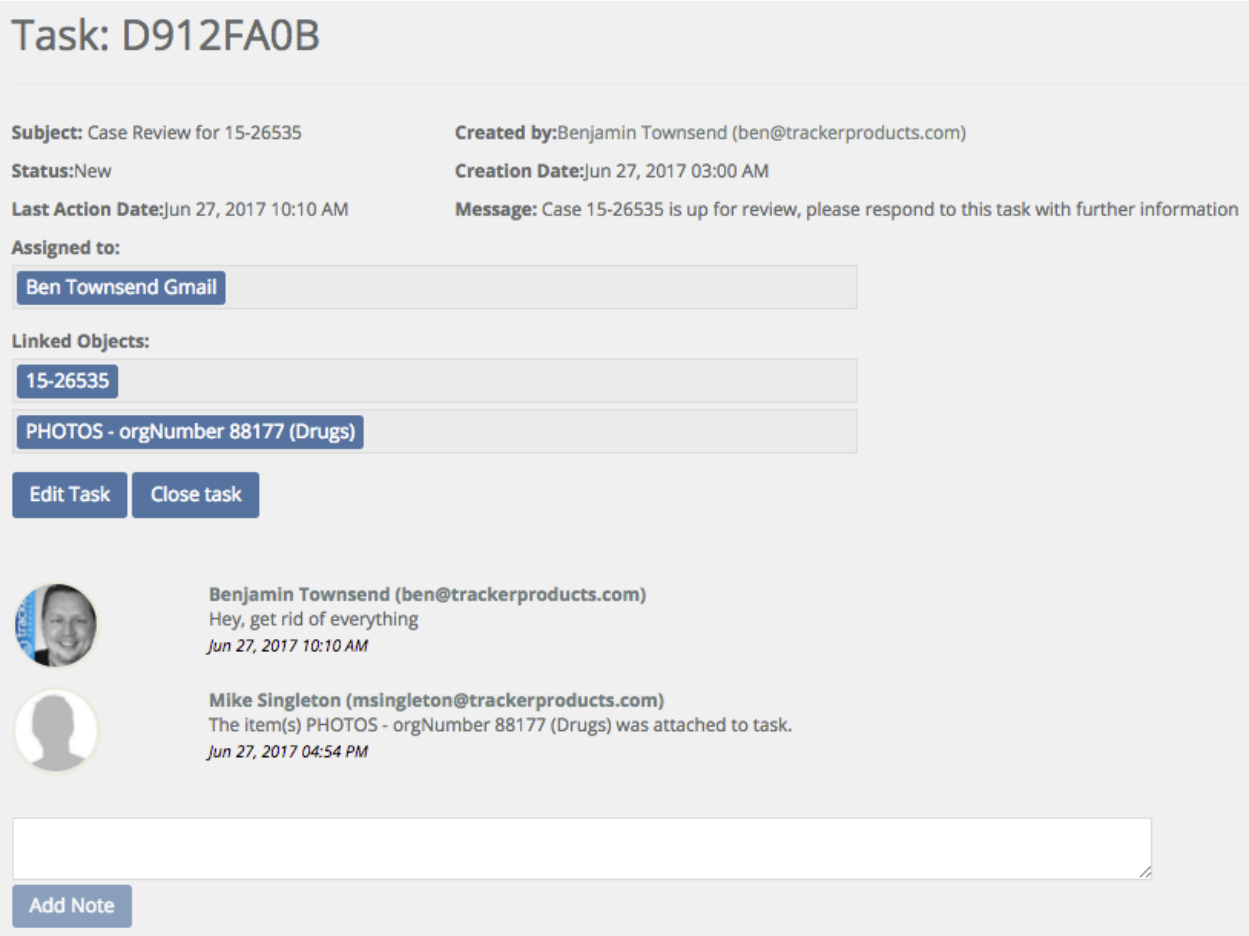


This page will show a list of all Tasks that you have created or are assigned to you. The list, by default, is sorted by the Last Action date column so you always get the most up to date task on top. You can of course resort the list by clicking on any of the headers.



The Tasks view page also has an option at the top to quick search for Tasks by Task # or Subject. Toggle the Open / Closed value to see Tasks that are open or Closed.

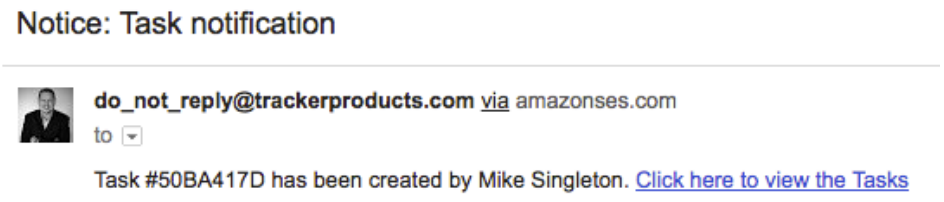
Each task will have a Details button that will take you into more details on the Task.



From this page you can see all of the Task details, who it is assigned to along with all notes on the task. If you created or are assigned the task you will have the option to Edit, Close or Add a Note to the task.

Task Email

All newly created or updated Tasks will generate an email to the recipient of the Task.



The email will contain information about the task and a short bit of info about the current status of the Task. The email will also contain a link back to the task in the system.

Task email with more details

By default, very little information about the Task is passed in the email. If you are an Administrator, you can go to Settings > Organization, and enable the option for the email to include more details. If enabled, the user will not only get a Task ID and what was updated, but they will get the actual log of the transaction.

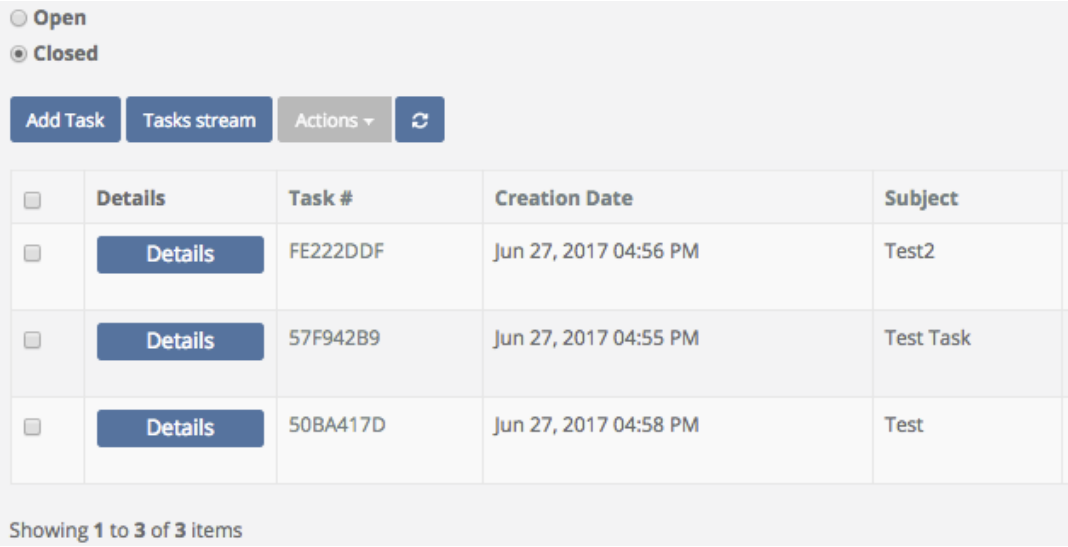
Edit a Task

Only the creator of a task or assignee can edit the task.

To Edit a task, go to the Details button for the Task and click the Edit option.

Closing or Opening a Task

Any Open task can be closed and vise versa. From the Task menu you can open or close more than one task at a time.



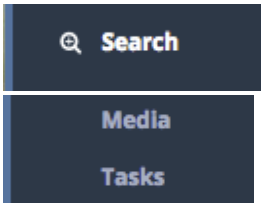
In this scenario I have my ‘Closed’ tasks screen open and I have selected three tasks. Go to Actions > Open tasks to open all the selected Tasks.

Task Security

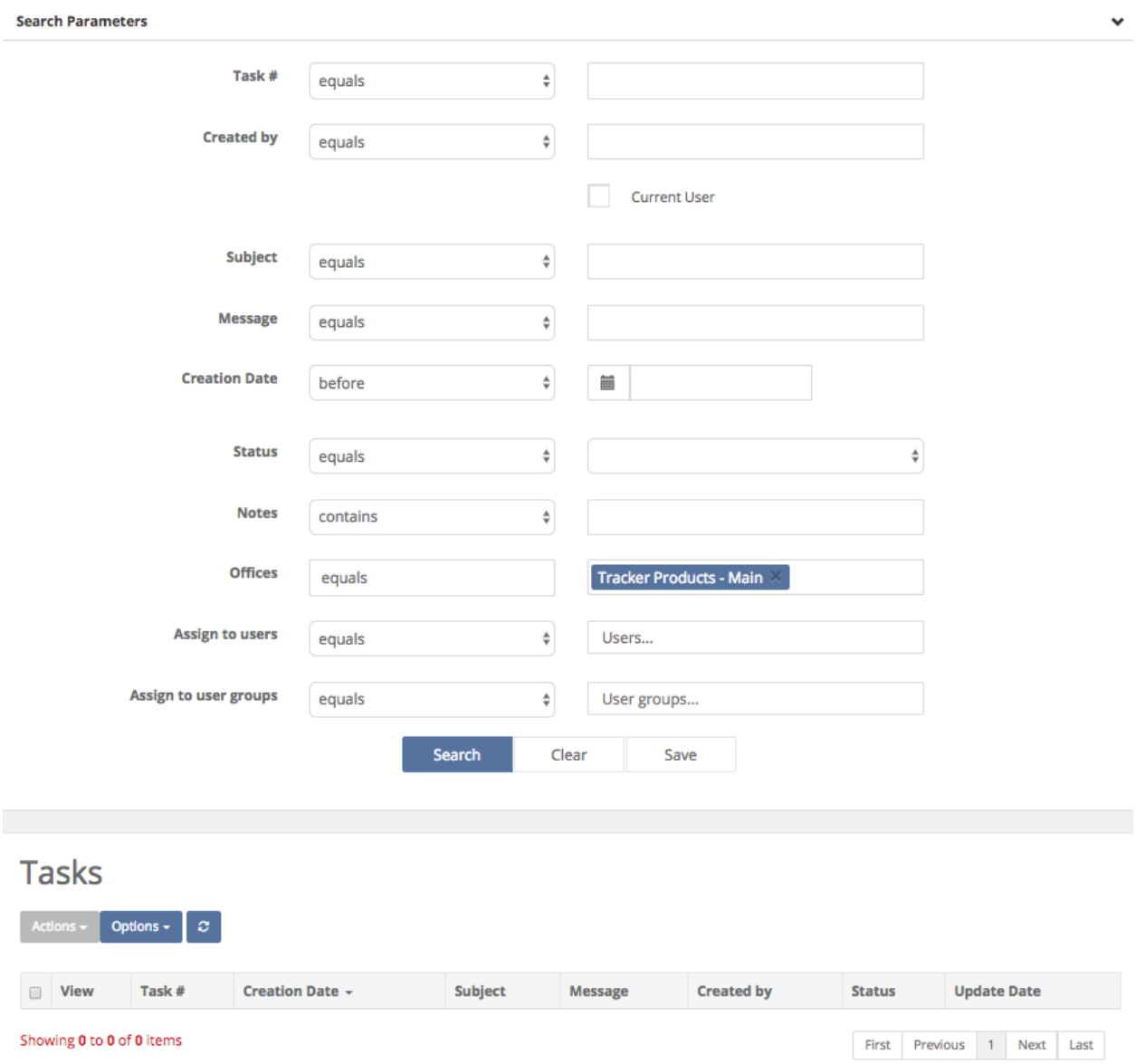
The Org Admin can control who can create or view tasks in the system. Go to Settings > Permissions Groups. Click Permissions for the desired group.

There is now a new option at the bottom to control who can View or Create a task. By default, these are enabled for all Permission Groups in the entire system.

Task Search



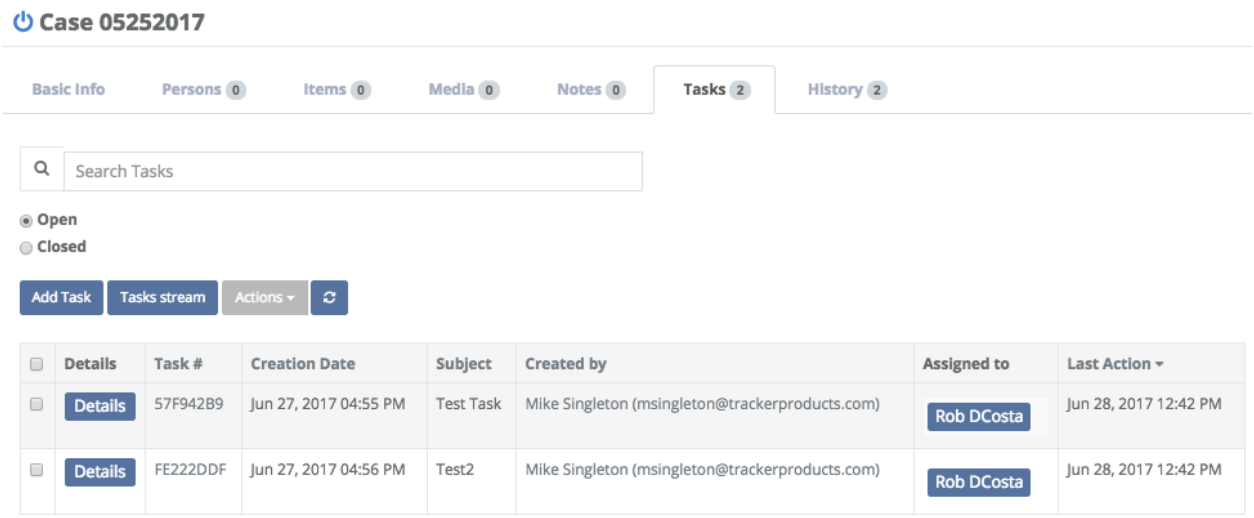
The Search menu contains a Tasks option which allows you to search across all Tasks in the system. From your Navigation Menu on the left hand side of the screen, you can click Search \ Tasks.



From here you search against any Task in your organization.

View a Task from with a Case, Person or Item view

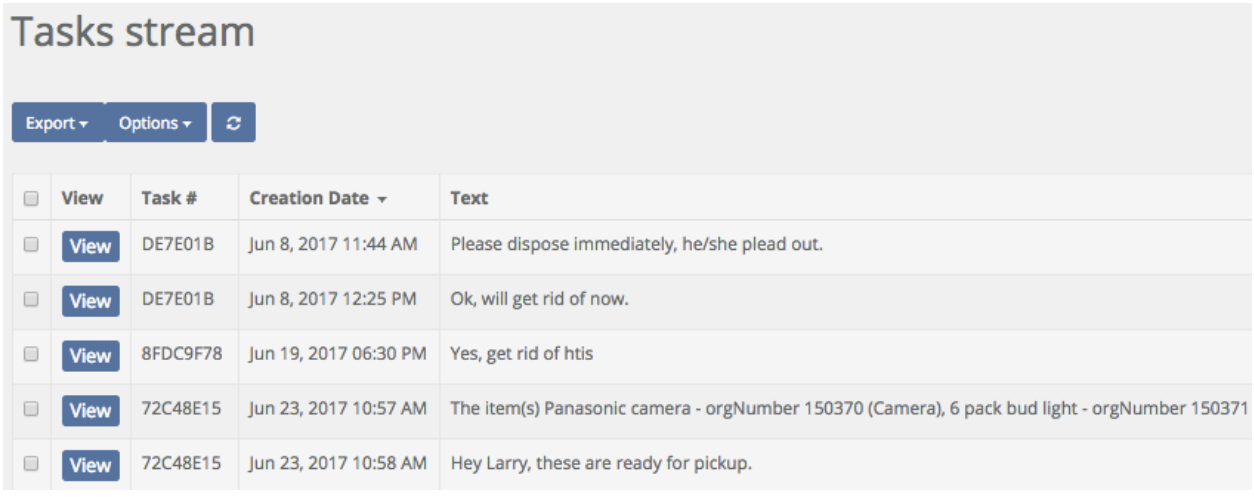
The Case, Person and Item details screen will now have a new tab for ‘Tasks’.



This Tab will show all Tasks that are, or have been, assigned to the object you are viewing. Like the Tasks menu you can go to details of the Task and work on it from there.

Task Stream

To view a list of all Task transactions, select ‘Tasks stream’ from the Tasks menu. From this page, we see a list of all Task transactions in descending date order.

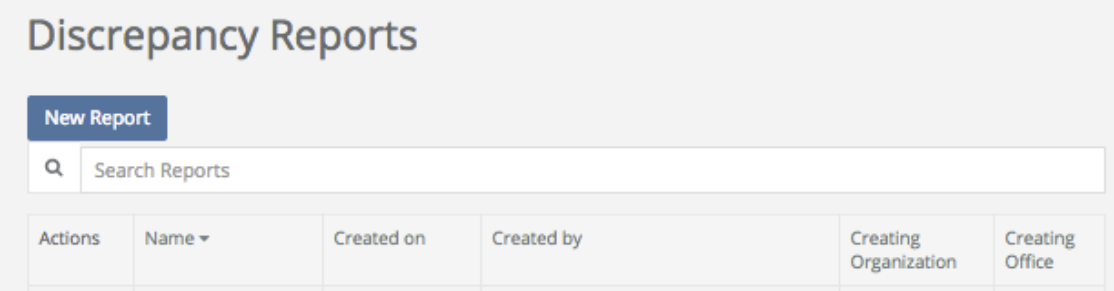


For more information regarding Tasks, please listen to our Webinar:
SAFE Sessions 2 - Tasks @ https://vimeo.com/207013802/02fd286346

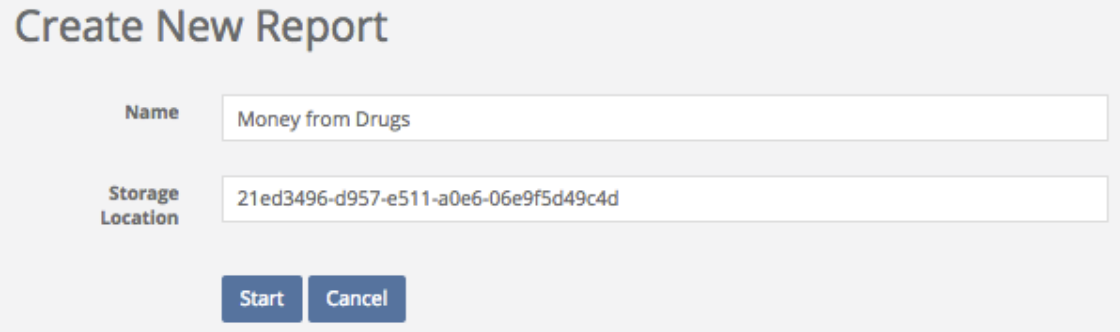
Discrepancy Reports

Quick Menu » Discrepancy Reports

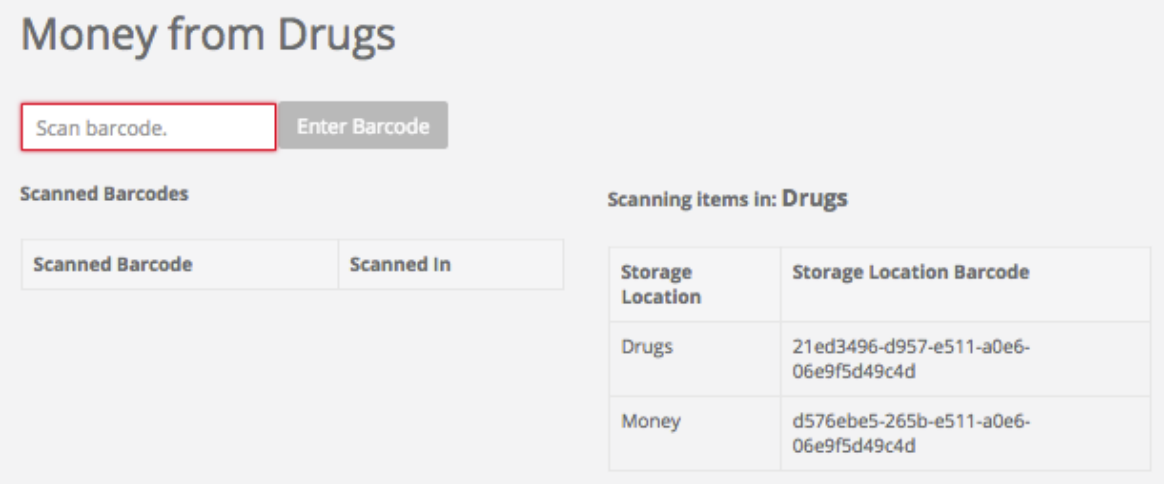
1. Given the appropriate Permissions from an Org Admin, you may access the **Discrepancy Reports** section of the software from the Quick Menu on the left hand side of the screen by selecting the **Discrepancy Reports** Icon (it has an exclamation point inside a triangle). You are now on the **Discrepancy Reports** screen. From here, you can choose which **Storage Location** you're interested in running a report on.



First click **New Report** and give your report a name and then scan or enter the barcode of the location you would like to audit.

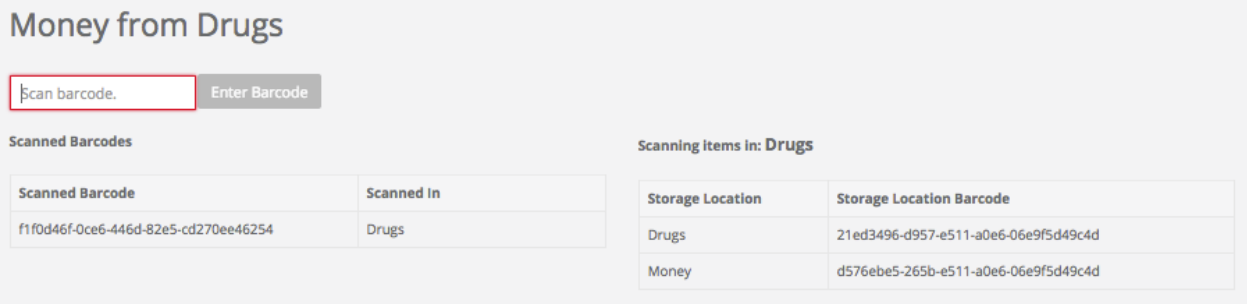


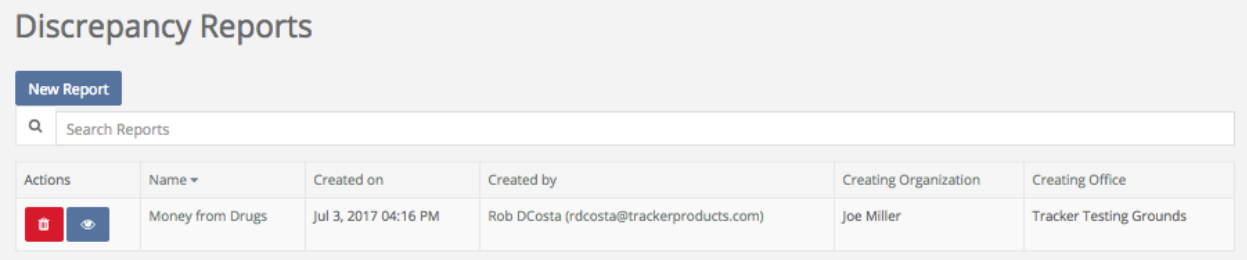
Next, Finally, click **Start**, or your Enter key.



You may then begin scanning in barcodes from that particular Storage Location.

** Note where it says "**Scanning Items in: _____** ". This is the current Storage Location where the Items are currently located. To change to a different (Nested) Storage Location, scan (or copy and paste) another Storage Location from the Storage Location Barcode (Nested List). In the above example, the only other Storage Location you may choose to scan is Money (since it is a Storage Location Nested under Drugs). Once the Storage Location has been changed, you may continue scanning Items, before finally running your report. **





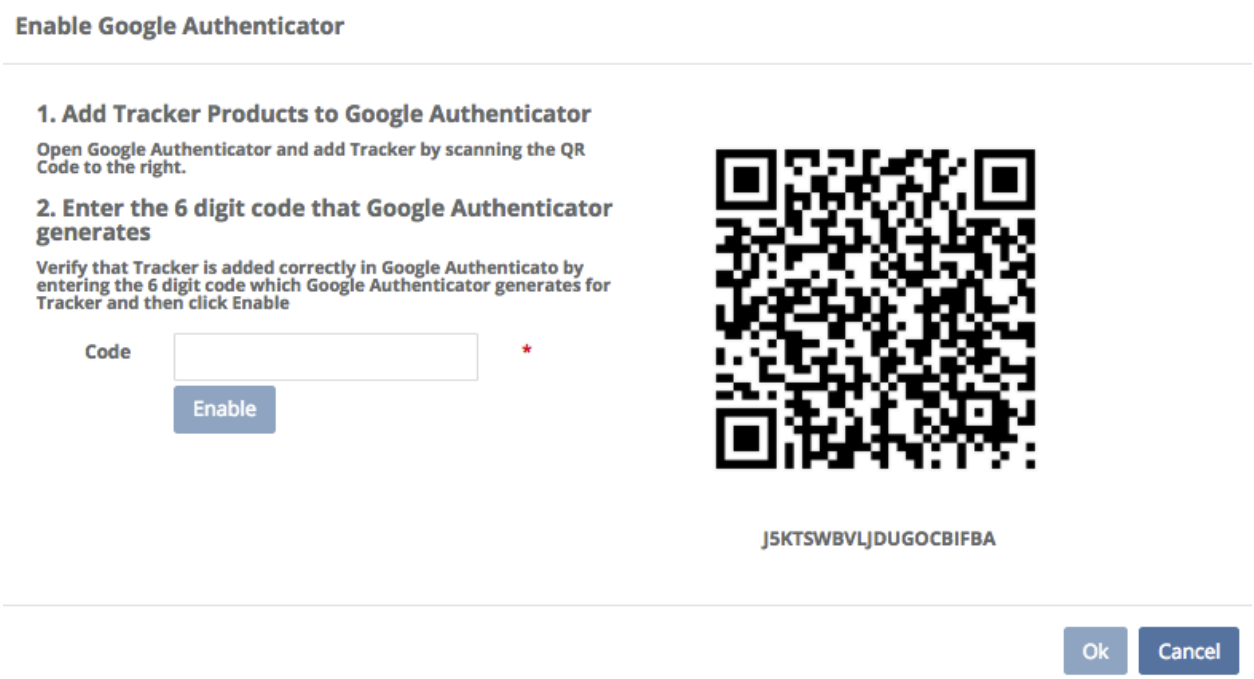
Once a report has been run, you will see a **Discrepancy Report** for the **Storage Location(s)** you specified. You may then view and print the report, go through the checklist, fix any discrepancies listed, sign and date it.

User Settings and Multi-Factor Authentication

Quick Menu » User Settings

Click **User Settings** from the Quick Menu on the left hand side of the screen. This will take you to the **User Settings** screen. Here, you can edit your **First** and **Last Name**, **Phone Number** etc.

For those needing an added level of site security, SAFE now supports **'Google Authenticator'** multi-factor authentication (**MFA**). Simply download the **Google Authenticator** app on your phone and go to your **User Settings**. **Edit** your settings and enable **Google Authenticator**. This will force a screen scan and setup of **MFA**. Upon your next login you will be required to enter the **MFA** code for the site.

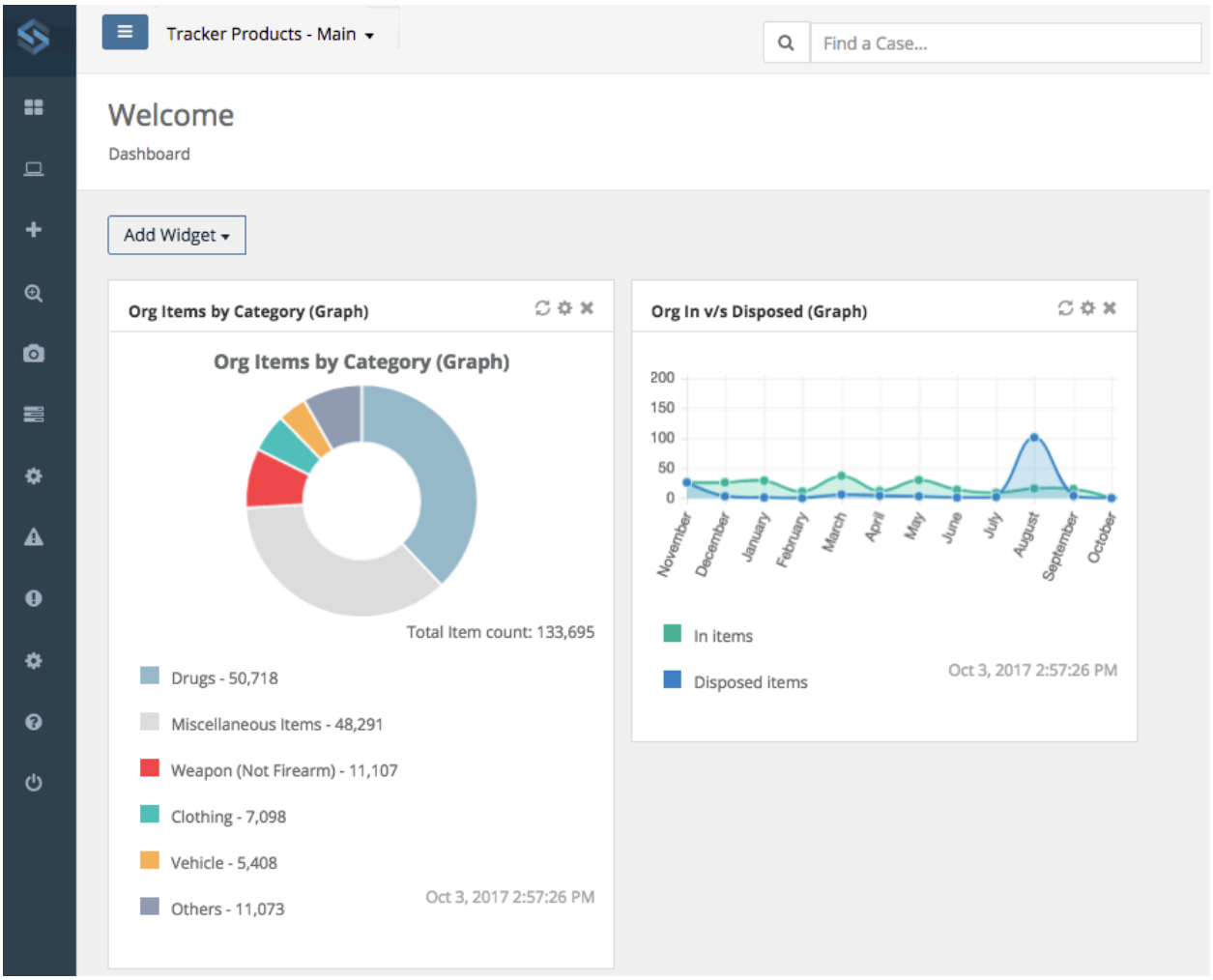


What is Multi-Factor Authentication (MFA)? MFA is a security system that requires more than one method of authentication from independent categories of credentials to verify the User's identity for a login or other transaction. It provides an additional layer or security.

For more information regarding Multi-Factor Authentication, please listen to our Webinar: **SAFE Sessions 3 - Security Options @** **https://vimeo.com/213138766/669ce2f31a**

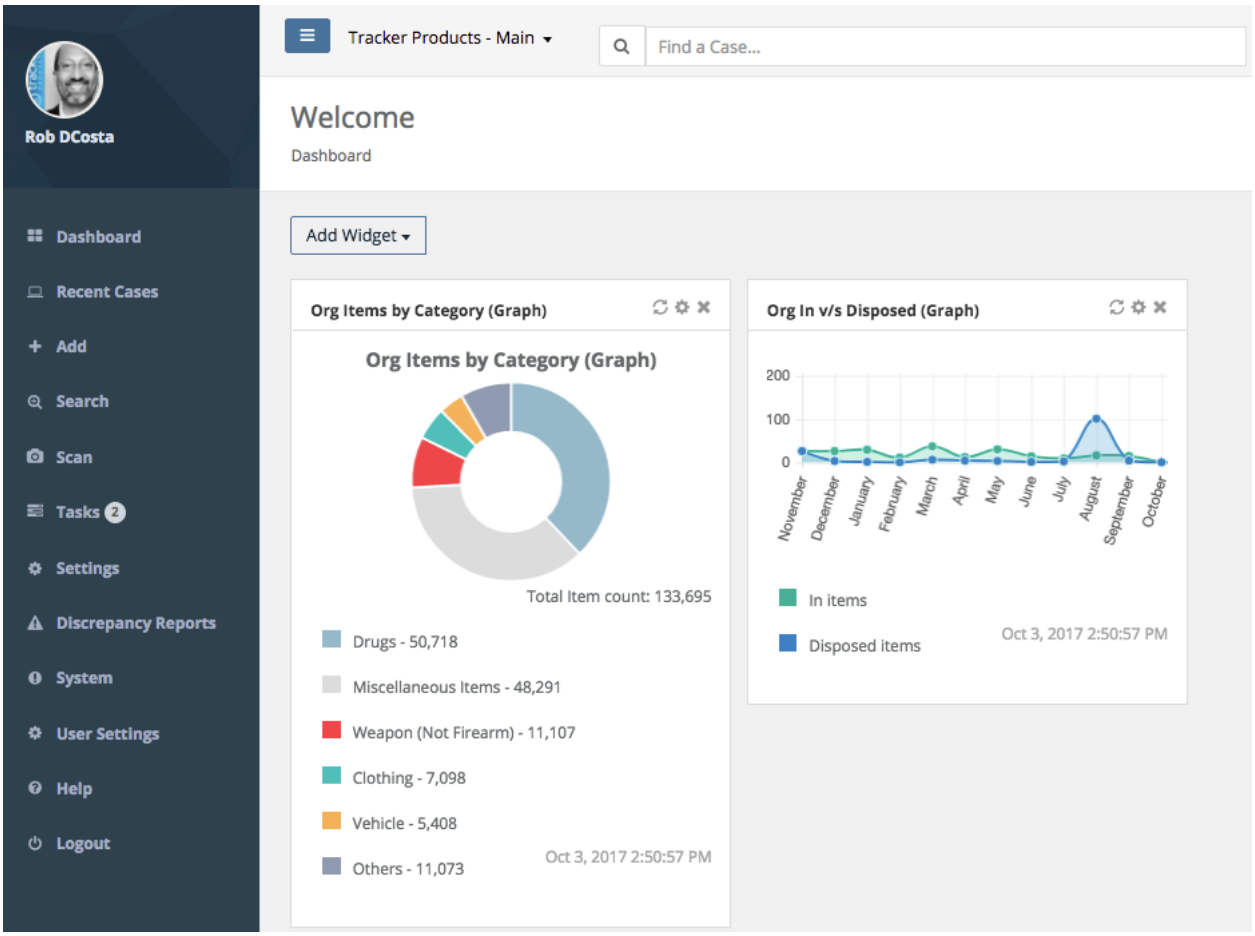
Collapsing the Quick Menu

Once you are familiar with the icons in your Quick Menu on the left hand side of your screen, if you'd like to have some extra room, you can collapse the Quick Menu by clicking the blue square box with 3 horizontal lines in it, next to the name of your office location in the upper left hand side of the screen. To re-inflate the menu, click the blue square box with 3 horizontal lines in it one more time.



Logging Out of the software (Shared Archive For Evidence)

To **Logout** of the software, simply click the **Logout** field located in the lower left hand corner of the screen. If you do not Logout of the system, you will remain logged in until you are automatically logged out (by default) 30 minutes after your last activity. You will be given a 2 minute warning before you're logged out.



Each User logged into the system is utilizing 1 Concurrent Access License (CAL) until you Logout. Make sure to logout of the system once you're finished using it, or additional Users will not be able to log into the system if a CAL Limit is reached. You will then see a message stating that the Maximum Number of Concurrent Access Licenses has been reached.