

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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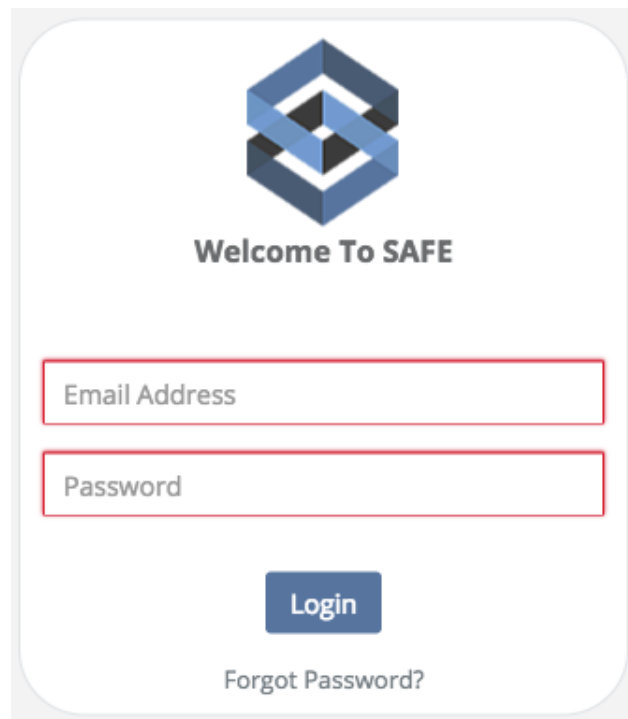
Help Files For General Users (Add Item only status)

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>



The image shows a login page for the SAFE software. At the top center is a blue and black geometric logo consisting of three interlocking cubes. Below the logo, the text "Welcome To SAFE" is displayed in a bold, black, sans-serif font. Underneath this, there are two input fields: the first is labeled "Email Address" and the second is labeled "Password". Both fields have a red border. Below the password field is a blue button with the word "Login" in white text. At the bottom of the page, there is a link that says "Forgot Password?" in a smaller, black font.

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>

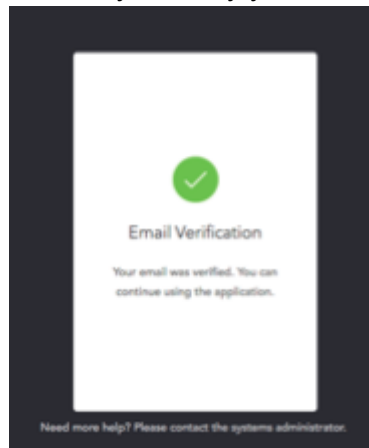
Thanks,

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 valid. [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!



Unlinked?

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.

Welcome To SAFE

newuser@trackerproducts.com

.....

Login

[Forgot Password?](#)

The user name or password is incorrect.

Password Reset

Email Address

Reset Password

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

Password Reset

Please Check your email for further instructions on how to reset your password

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

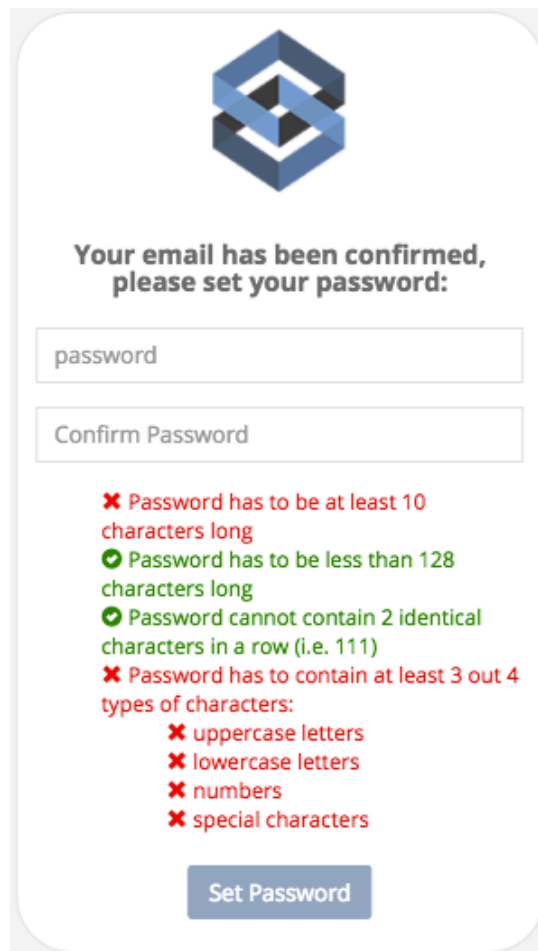
Dear New User,

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](tel: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.

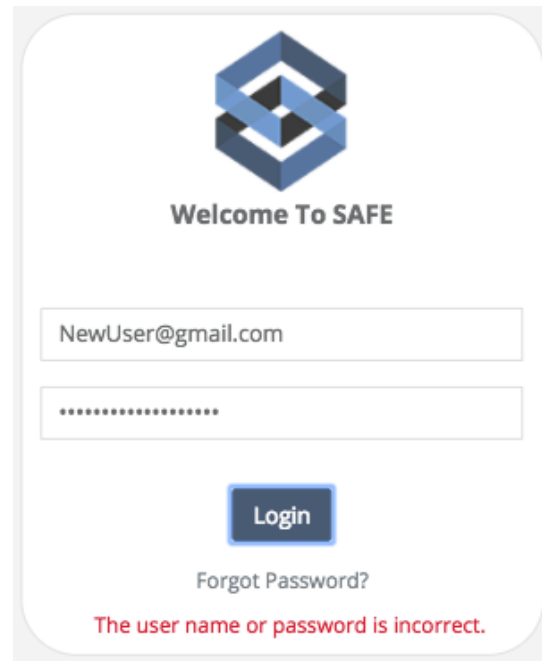


The screenshot shows a password reset interface. At the top is a blue geometric logo. Below it, the text reads: "Your email has been confirmed, please set your password:". There are two input fields: "password" and "Confirm Password". Below the fields is a list of requirements with red 'X' icons for failures and green checkmarks for successes:

- ✗ Password has to be at least 10 characters long
- ✔ Password has to be less than 128 characters long
- ✔ Password cannot contain 2 identical characters in a row (i.e. 111)
- ✗ Password has to contain at least 3 out of 4 types of characters:
 - ✗ uppercase letters
 - ✗ lowercase letters
 - ✗ numbers
 - ✗ special characters

At the bottom is a blue button labeled "Set Password".

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

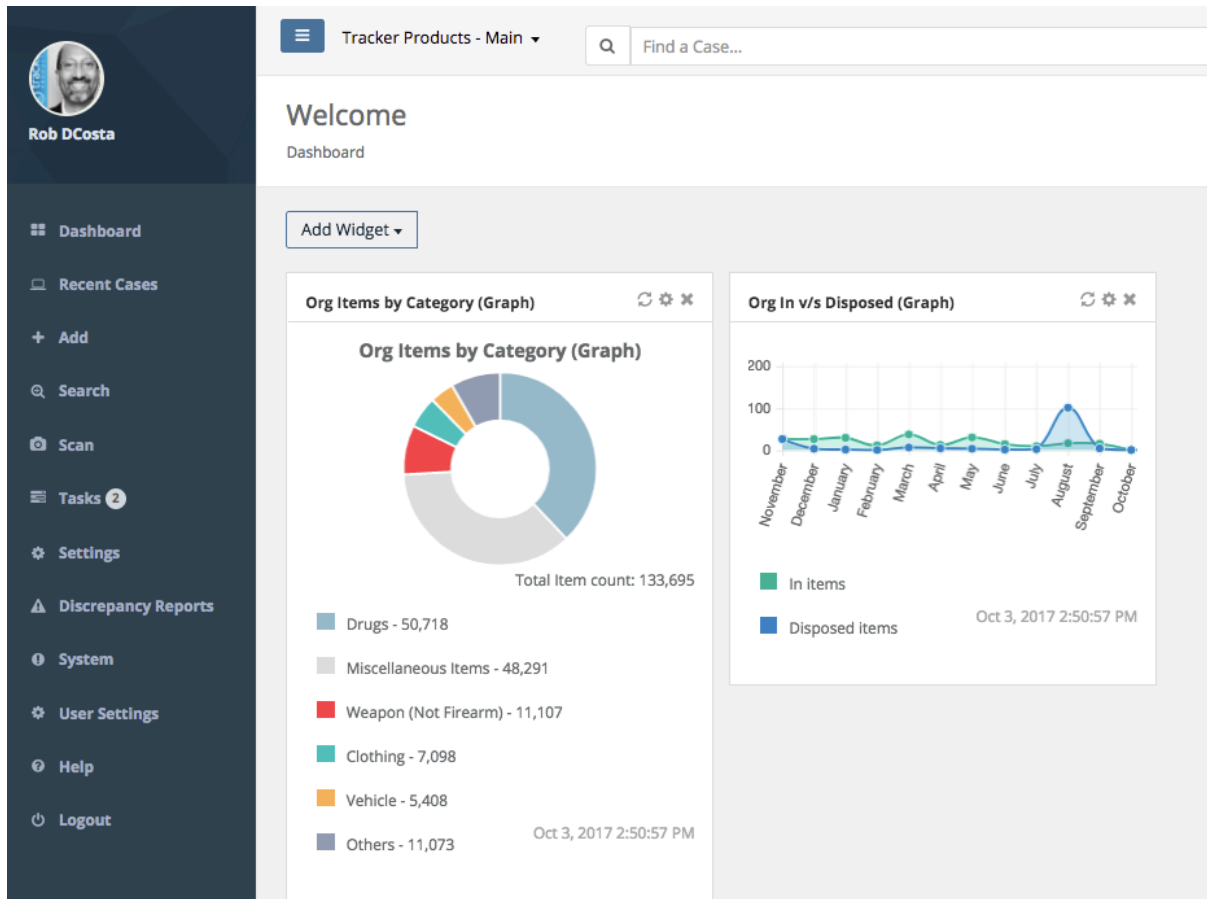
1. In Microsoft Windows, minimize all the programs that are open on your desktop.
2. Right click on an open spot on your desktop.
3. Select New.
4. Select Shortcut.
5. Enter your software link into the location box.
6. Click next when done.
7. This screen should contain the name for the link.
8. Click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

Add Case
Add / Case

Basic Info

Case Number *

Offense Type *

Next

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

Add Case
Add / Case

Basic Info

Case Number **Already exists!**
View This Case

Offense Type *

Next

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**.

Add Case

Add / Case

Basic Info

Status:

Case Number:

Offense Type:

Case Officer: *

Offense Location: *

Offense Date: *

Tags:

Offense Description:
Characters Remaining: 500

Review Date:

Review Date Notes:
Characters Remaining: 0

Save

- Add an Item
- Add a Case
- ✓ Add a Person
- View Added Case
- Add Media for the Case
- Add a Note for the Case

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.

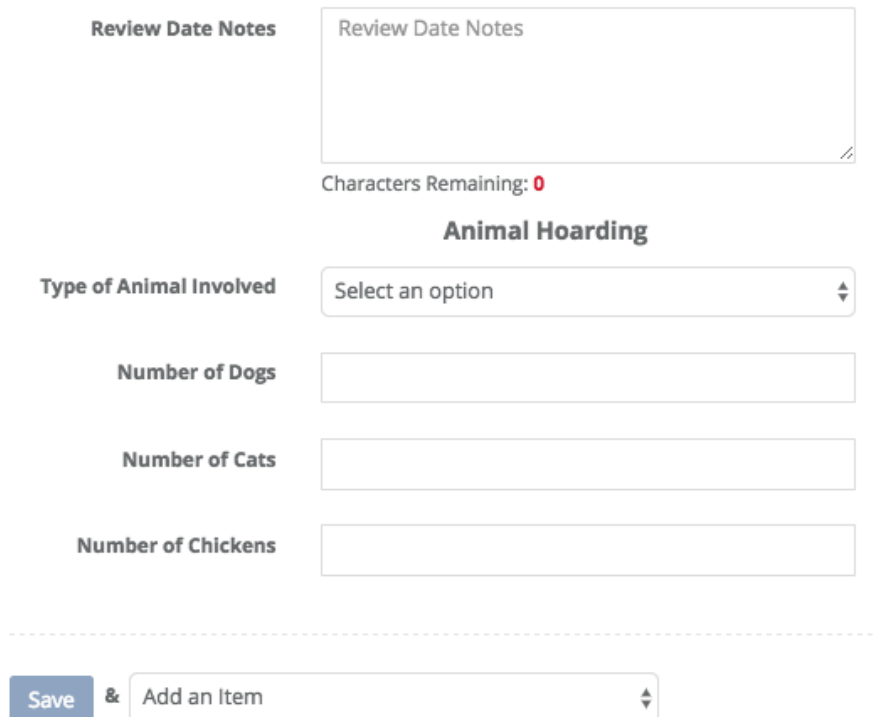
3. In addition to the Basic Info Add Case fields, you may be asked to fill out additional **Fields** if you enter a **Case** containing a particular **Offense Type**. For example, if you choose the **Offense Type** Animal Hoarding, an administrator may have added a **Form** to be filled out.

*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.

Case View

View / Case

The screenshot shows the 'Case View' interface for Case 17-0701. At the top, there is a header with a power icon and the case number 'Case 17-0701'. Below the header is a navigation bar with tabs: 'Basic Info' (selected), 'Persons 1', 'Items 0', 'Media 0', 'Notes 0', 'Tasks 0', and 'History 1'. The main content area displays various case details in a form-like layout:

- Status:** Open (with a dropdown arrow)
- Org / Office:** Tracker Products / Main
- Case Number:** 17-0701
- Offense Type:** Alcohol Related
- Case Officer:** Joe Miller (jmiller@trackerproducts.com)
- Offense Location:** The Train Depot, Buford Avenue, Hank, OH, United States
- Offense Description:** (Empty text area)
- Offense Date:** Jun 1, 2017 12:19 PM
- Tags:** No Tags
- Review Date:** Mar 10, 2020 12:17 PM
- Review Date Notes:** (Empty text area)

At the bottom left of the screen, there is an 'Edit' button.


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.



Basic Info **Persons 1** Items 15 Media 8 Notes 0 Tasks 0 History 14

Add Person

Actions ▾ Export ▾ Options ▾ 

Search 

<input type="checkbox"/>	View	Person Type	Business Name ▲	First Name	Middle Name	Last Name	Alias	Driver's License
<input type="checkbox"/>	View	Person of Interest		Axel		Foley	Axel F	

Showing 1 to 1 of 1 items

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

First Name *

Middle Name

Last Name *

Alias

Driver's License

Race

Gender

Date of Birth

Mobile Phone

Other Phone

Email

Deceased

Juvenile

Address

Type

Country

Address 1

Address 2

City

State

Postal Code

Add to Case

Add to Case

Person Type

Note

- ✓
-
-

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	<input type="text" value="Business Name"/>	
First Name	<input type="text" value="First Name"/>	*
Middle Name	<input type="text" value="Middle Name"/>	
Last Name	<input type="text" value="Last Name"/>	*
Alias	<input type="text" value="Alias"/>	
Driver's License	<input type="text" value="Driver's License"/>	
Race	<input type="text" value="Unknown"/>	
Gender	<input type="text" value="Unknown"/>	
Date of Birth	<input type="text" value=""/>	
Mobile Phone	<input type="text" value="Mobile Phone"/>	
Other Phone	<input type="text" value="Other Phone"/>	
Email	<input type="text" value="Email"/>	
	<input type="checkbox"/> Deceased	
	<input type="checkbox"/> Juvenile	
Address		
Type	<input type="text" value=""/>	
Line 1	<input type="text" value="Line 1"/>	
Line 2	<input type="text" value="Line 2"/>	
City	<input type="text" value="City"/>	
Postal Code	<input type="text" value="Postal Code"/>	
Country	<input type="text" value=""/>	
Add to Case		
Add to Case	<input type="text" value="16-0000Test"/>	
Person Type	<input type="text" value=""/>	*
Note	<input type="text" value=""/>	

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.

Add Person to Case

We have found the following people with duplicate values in the system:

	Business Name	First Name	Middle Name	Last Name	Driver's License	Date of Birth	Email
Add This Person		Ferris		Bueller		1973-01-01T05:00:00Z	
Add This Person		Ferris		Bueller			

[Proceed anyway](#)

[Cancel](#)

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**.

Remove From Case



Are you sure you want to remove these people from this case?

Property Owner: Bob Smythe

[Remove From Case](#)

[Cancel](#)

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**.

Add Item
Add / Item

Basic Info

Case

Category *

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	<input type="text" value="15-06013975"/>	
Category	<input type="text" value="Fingerprints"/>	
Recovered At	<input type="text" value="recovery location"/>	*
Recovered By	<input type="text"/>	*
Recovery Date	<input type="text" value="📅"/>	*
Description	<input type="text" value="item description"/>	*
Custody Reason	<input type="text"/>	*
Make	<input type="text"/>	
Model	<input type="text"/>	
Serial Number	<input type="text" value="item serial number"/>	
Item Belongs to	<input type="text" value="Find persons to search for"/>	
Tags	<input type="text" value="Add Tags..."/>	
Storage Location	<input type="text" value="Storage Location Name"/>	*

- 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

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.

Cellular Phone Form (Sys Template)

Phone Label	<input type="text" value="Phone Label"/>
Phone IMEI	<input type="text" value="Phone IMEI"/>
Memory Card Present	<input type="checkbox"/> No <input type="checkbox"/> Yes
Carrier	<input type="text" value="AT&T"/>

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.

Advanced Search

Advanced Search / Case

The screenshot displays the 'Advanced Search' interface for 'Case'. At the top right, there is a 'Saved Searches' dropdown menu. Below it is a 'Search Parameters' section with a dropdown arrow. The search parameters are organized into two columns:

- Left Column:** Created By, Created Date, Case Number, Case Officer, Offense Type, Offense Location, Offense Date, Offense Description, Active, Tags, Offices, Saved Searches of Items.
- Right Column:** Text input fields for 'Created By', 'Case Number', 'Case Officer', 'Offense Type', 'Offense Location', 'Offense Date', 'Offense Description', 'Active', 'Tags for search', and 'Saved Searches of Items'. There are also checkboxes for 'Current User' next to 'Created By' and 'Case Officer', and a date picker icon next to 'Created Date' and 'Offense Date'.

At the bottom of the search parameters section, there are two toggle switches: 'Search History' (set to OFF) and 'Search in Custom Data' (set to OFF). Below these are three buttons: 'Search' (highlighted in blue), 'Clear', and 'Save'.

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.

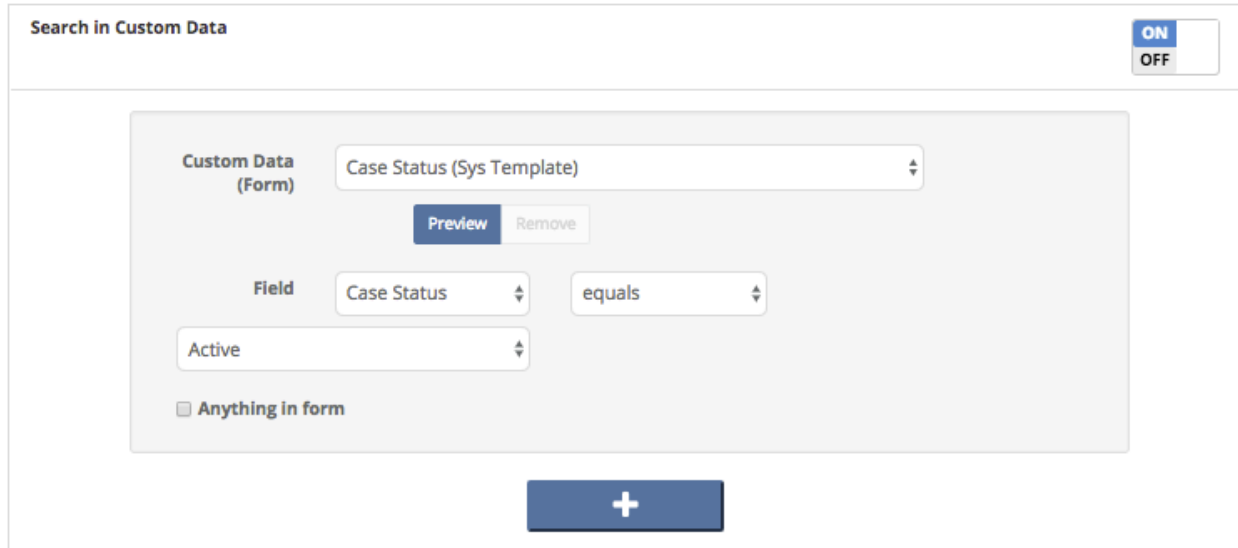
The screenshot shows a search configuration interface. At the top left, it says "Search History". At the top right, there is a toggle switch currently set to "ON". Below this, there are two rows of search criteria. The first row is labeled "Update Made By" and has a dropdown menu set to "equals" and an empty text input box to its right. The second row is labeled "Update Date" and has a dropdown menu set to "before", a calendar icon, and an empty text input box to its right.

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.



The screenshot shows a user interface for configuring a search in custom data. At the top, there is a toggle switch labeled 'Search in Custom Data' which is currently set to 'ON'. Below this, a search configuration box is displayed. Inside this box, the 'Custom Data (Form)' dropdown is set to 'Case Status (Sys Template)'. There are 'Preview' and 'Remove' buttons next to it. The 'Field' dropdown is set to 'Case Status', and the operator dropdown is set to 'equals'. Below these, there is a dropdown menu with 'Active' selected. At the bottom of the configuration box, there is a checkbox labeled 'Anything in form' which is currently unchecked. Below the entire configuration box is a large blue button with a white plus sign.

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.

Advanced Search

Advanced Search / Case

Advanced Search / Case

Search Parameters

Cases

Actions Reports Export Options

Case Officer	Created By
er (jmill@trackerproducts.com)	Rob DCosta (rdcosta@trackerproducts.com)
System Admin Move (sysadminmove@trackerproducts.com)	Mike Singleton (msingleton@trackerproducts.com)
er (jmill@trackerproducts.com)	Joe Miller (jmill@trackerproducts.com)
1617-123456789	Joe Miller (jmill@trackerproducts.com)

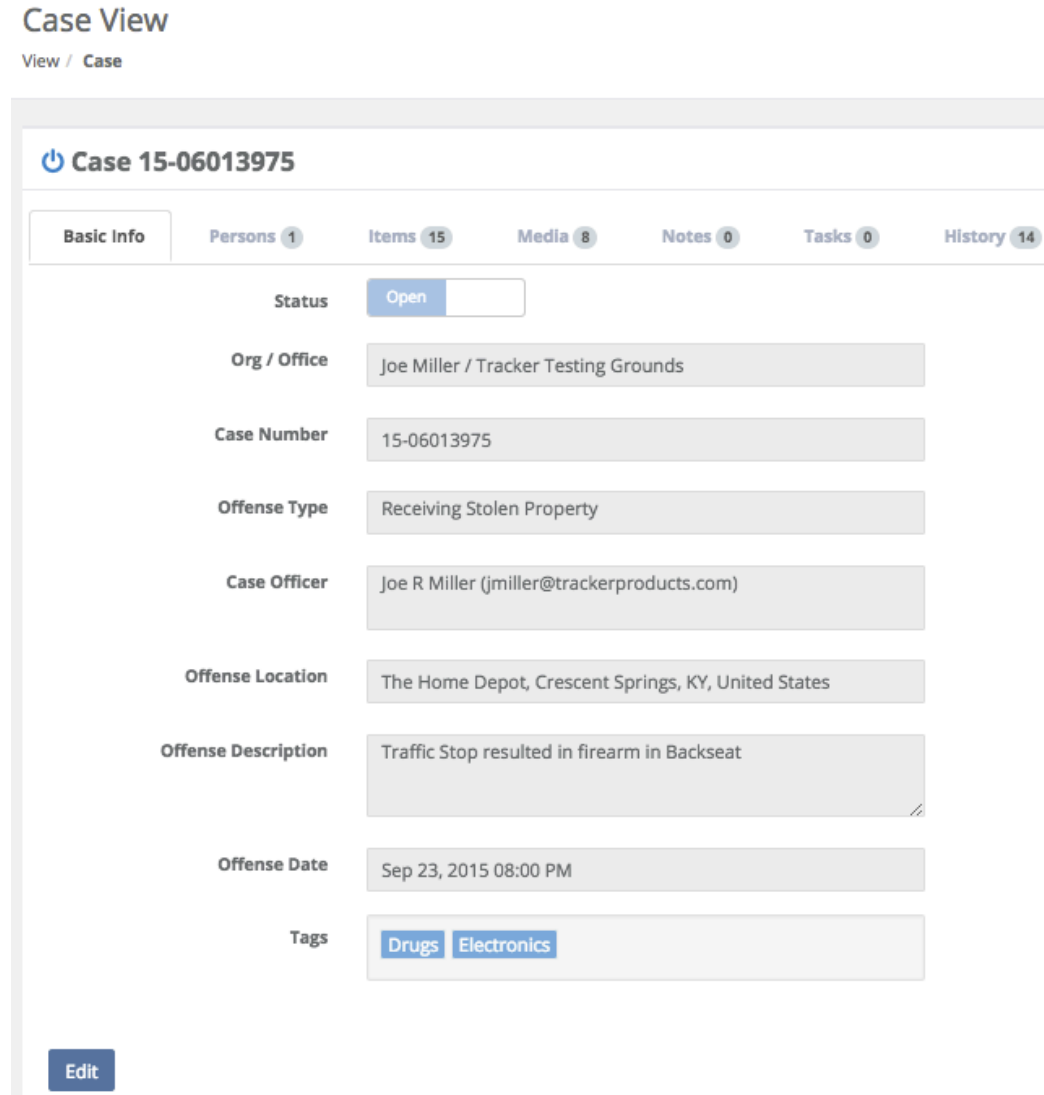
View

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.

Case 16-001Test002

Basic Info **Persons 1** Items 2 Media 2 Notes 0 Tasks 0 History 3

Add Person

Actions ▾ Export ▾ Options ▾ ↻

Search 🔍

<input type="checkbox"/>	View	Person Type	Business Name ▲	First Name	Middle Name	Last Name	Alias	Driver's License	Mobile Phone
<input type="checkbox"/>	View	Person of Interest		Ferris		Bueller			

Showing 1 to 1 of 1 items

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**

Case 15-06013975

Basic Info Persons 1 **Items 15** Media 8 Notes 0 Tasks 0 History 14

Add Item

Actions ▾ Reports ▾ Export ▾ Options ▾ ↻

<input type="checkbox"/>	View	Primary Case #	Org #	Item # ▲	Split	Category	Description	Recovery Date	Status
<input type="checkbox"/>	View	15-06013975	13	0		Drugs	9mm	Sep 23, 2015 8:00:00 PM	Checked In
<input type="checkbox"/>	View	15-06013975	14	0		Drugs	Green Leafy substance	Sep 23, 2015 8:00:00 PM	Checked Out
<input type="checkbox"/>	View	15-06013975	15	0		Drugs	Ruger P-99	Sep 23, 2015 8:00:00 PM	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.

 **Case 15-06013975**

Basic info Persons **1** **Items 15** Media **8** Notes **0** Tasks **0** History **14**

Add Item

Actions ▾ Reports ▾ Export ▾ Options ▾ ↻

	Case #	Org #	Item # ▲	Split	Category	Description	Recovery Date	Status
View Item	15-06013975	13	0		Drugs	9mm	Sep 23, 2015 8:00:00 PM	Checked In
Check Item In	15-06013975	13	0		Drugs	9mm	Sep 23, 2015 8:00:00 PM	Checked In
Check Item Out	15-06013975	14	0		Drugs	Green Leafy substance	Sep 23, 2015 8:00:00 PM	Checked Out
Move Item	15-06013975	14	0		Drugs	Green Leafy substance	Sep 23, 2015 8:00:00 PM	Checked Out
Transfer Item	15-06013975	15	0		Drugs	Ruger P-99	Sep 23, 2015 8:00:00 PM	Disposed
Dispose Item	15-06013975	1	1		Drugs	Macbook Air	Sep 23, 2015 8:00:00 PM	Checked Out
Undispose Item	15-06013975	13450	4		Electronics	Samsung Galaxy	Jan 4, 2016 12:00:00 AM	Checked In
Duplicate	15-06013975	13451	5		Audio / Video Equip	asdgasf	Jan 20, 2016 12:00:00 AM	Checked In
Split	15-06013975	13451	5		Audio / Video Equip	asdgasf	Jan 20, 2016 12:00:00 AM	Checked In
Mass Update	15-06013975	13455	6		Clothing	White Tee Shirt	Apr 13, 2016 1:00:00 AM	Disposed
Add To Case	15-06013975	13456	7		Electronics	Samsung Galaxy	Jan 4, 2016 12:00:00 AM	Checked In
Remove From Case	15-06013975	13456	7		Electronics	Samsung Galaxy	Jan 4, 2016 12:00:00 AM	Checked In
Change Primary Case	15-06013975	13457	8		Drugs	White powdery substance	Apr 4, 2016 12:00:00 AM	Checked In
Manage Cases	15-06013975	13463	9		Ammunition	9mm casings	May 16, 2016 12:00:00 AM	Checked In
Add To Task	15-06013975	13464	10		Found Property	1 small bottle of Patron tequilla	Jun 1, 2016 12:00:00 AM	Checked In
<input checked="" type="checkbox"/> View	15-06013975	13465	11		Found Property	1 small bottle of Chivas Regal scotch	Jun 1, 2016 12:00:00 AM	Checked In

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.

Item View

View / Item

Item

- Basic Info
- Cases **1**
- Media **0**
- Notes **0**
- Tasks
- Chain of Custody
- Scan History
- History **6**

Org #	150022
Item #	1
Case	16-0001Test001
Status	Checked In
Recovered At	Wally Wash Laundromat, Karl Road, Columbus, OH, United States
Recovery Date	Feb 1, 2016 12:00 AM
Recovered By	Joe Miller (jmillier@trackerproducts.com)
Storage Location	Temp Lockers New
Submitted By	Rob DCosta (rdcosta@trackerproducts.com)
Category	Electronics
Custody Reason	Evidence
Barcode	1ef5b3c4-ffb5-4457-ab39-31ace195a1ab
Description	Macbook Air TEST
Item Belongs to	No Persons
Custodian	
Tags	No Tags

[Edit](#) [Actions](#) [Reports](#)

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.

Check In Items

Returned By *

Storage Location

Note

Signature

Checking in 1 item

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.


Check Out Items

Taken By *

Reason

Notes 

Expected Return Date

Signature 

Checking out 1 item

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.

Move Item(s)

Moved By Rob DCosta

Storage Location *

Notes

Signature

Moving 1 item

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.

Transfer

Transfer From	<input type="text" value="Rob DCosta"/>
Transfer To	<input type="text"/>
Notes	<input type="text" value="Notes"/> Characters Remaining: 500
Signature	<input type="button" value="Touch Screen"/> <input type="button" value="Topaz Signature Pad"/> <input type="button" value="No Signature"/>

Transferring 1 item

<input type="button" value="Ok"/>	<input type="button" value="Cancel"/>
-----------------------------------	---------------------------------------

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.

Item Disposal

Disposed By

Method *

Notes

Signature

Disposing 1 item

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.

Check In Items

Returned By	<input type="text"/>	*
Storage Location	<input type="text" value="type '/' or start typing a location name"/>	*
Note	<input type="text" value="Note"/>	
Signature	<input type="button" value="Touch Screen"/> <input type="button" value="Topaz Signature Pad"/> <input type="button" value="No Signature"/>	

Checking in 1 item

<input type="button" value="Ok"/>	<input type="button" value="Cancel"/>
-----------------------------------	---------------------------------------

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>**.

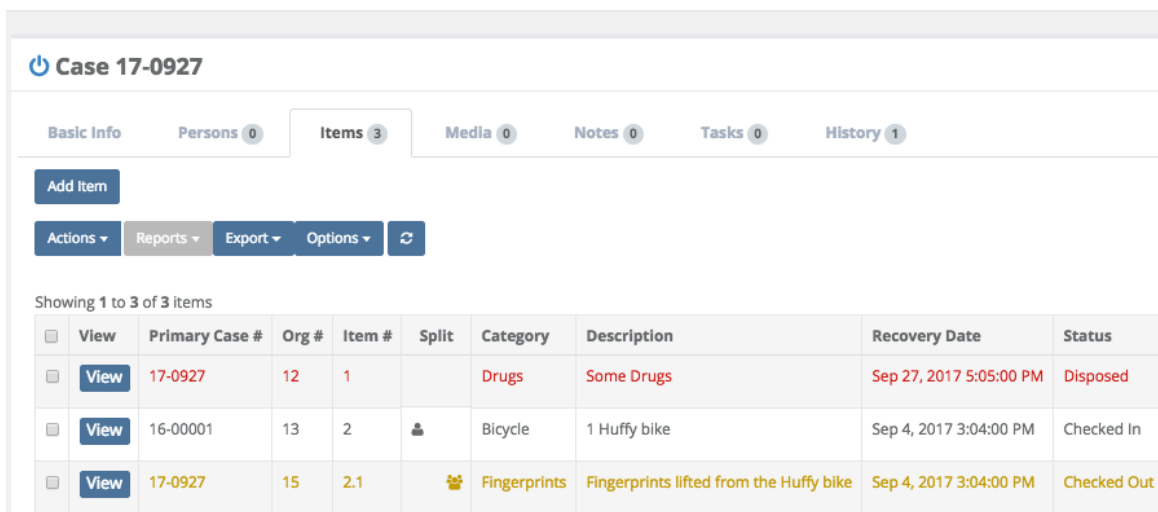
If you clicked **Save & View Item**, you will now be on the **Item View** page. Click the **Cases Tab**, then click **View** (to **View the Case** with the **Item** you just **Split**). Next, on the **Case View** screen, click the **Items Tab**. You will now see the **Item** you just **Split**.

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.

Case View

View / Case





Case 17-0927

Basic Info Persons 0 Items 3 Media 0 Notes 0 Tasks 0 History 1

Add Item

Actions Reports Export Options Refresh

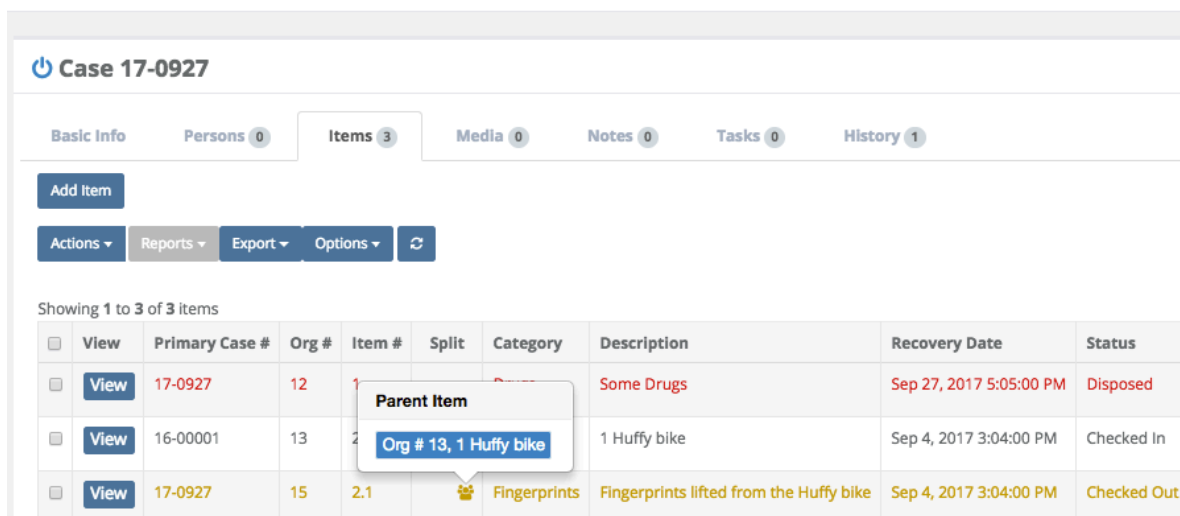
Showing 1 to 3 of 3 items

<input type="checkbox"/>	View	Primary Case #	Org #	Item #	Split	Category	Description	Recovery Date	Status
<input type="checkbox"/>	View	17-0927	12	1		Drugs	Some Drugs	Sep 27, 2017 5:05:00 PM	Disposed
<input type="checkbox"/>	View	16-00001	13	2		Bicycle	1 Huffy bike	Sep 4, 2017 3:04:00 PM	Checked In
<input type="checkbox"/>	View	17-0927	15	2.1		Fingerprints	Fingerprints lifted from the Huffy bike	Sep 4, 2017 3:04:00 PM	Checked Out

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

Case View

View / Case





Case 17-0927

Basic Info Persons 0 Items 3 Media 0 Notes 0 Tasks 0 History 1

Add Item

Actions Reports Export Options Refresh

Showing 1 to 3 of 3 items

<input type="checkbox"/>	View	Primary Case #	Org #	Item #	Split	Category	Description	Recovery Date	Status
<input type="checkbox"/>	View	17-0927	12	1		Drugs	Some Drugs	Sep 27, 2017 5:05:00 PM	Disposed
<input type="checkbox"/>	View	16-00001	13	2		Bicycle	1 Huffy bike	Sep 4, 2017 3:04:00 PM	Checked In
<input type="checkbox"/>	View	17-0927	15	2.1		Fingerprints	Fingerprints lifted from the Huffy bike	Sep 4, 2017 3:04:00 PM	Checked Out

Parent Item
Org # 13, 1 Huffy bike

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.

Mass Update Items

Description	<input type="text" value="new item description"/>	<input type="checkbox"/> No
Recovered At	<input type="text"/>	<input type="checkbox"/> No
Recovered By	<input type="text"/>	<input type="checkbox"/> No
Submitted By	<input type="text"/>	<input type="checkbox"/> No
Category	<input type="text"/>	<input type="checkbox"/> No
Recovery Date	<input type="text" value="06/26/2017 02:35 PM"/>	<input type="checkbox"/> No
Make	<input type="text"/>	<input type="checkbox"/> No
Model	<input type="text"/>	<input type="checkbox"/> No
Item Belongs to	<input type="text"/>	<input type="checkbox"/> No
Tags	<input type="text" value="Add Tags..."/>	<input type="checkbox"/> No

This field cannot be mass updated because items from multiple cases are selected!

Overwrite? No

Mass updating 2 items

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.

[Case 17-0927](#)

The screenshot shows a web interface for Case 17-0927. At the top, there are tabs for 'Basic Info', 'Persons 0', 'Items 3', 'Media 0', 'Notes 0', 'Tasks 0', and 'History 1'. Below the tabs is an 'Add Item' button and a menu with 'Actions', 'Reports', 'Export', and 'Options'. The 'Actions' menu is open, showing options like 'View Item', 'Check Item In', 'Check Item Out', 'Move Item', 'Transfer Item', 'Dispose Item', 'Undispose Item', 'Duplicate', 'Split', 'Mass Update', 'Add To Case' (highlighted with a blue box), 'Remove From Case', 'Change Primary Case', 'Manage Cases', and 'Add To Task'. Below the menu is a table with 3 items:

Case #	Org #	Item #	Split	Category	Description	Recovery Date	Status
12	1			Drugs	Some Drugs	Sep 27, 2017 5:05:00 PM	Disposed
13	2			Bicycle	1 Huffly bike	Sep 4, 2017 3:04:00 PM	Checked In
15	2.1			Fingerprints	Fingerprints lifted from the Huffly bike	Sep 4, 2017 3:04:00 PM	Checked Out

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

Add Items to Case

Case Number *

Adding 2 items to case

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**.

Remove Item From Case

Please select a case

Removing 1 item from case

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.

Change Primary Case

Select New Primary Case

Remove Old Primary Case From Item(s)

Changing primary case for 1 item

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.

Case 16-0001Test001

Basic Info Persons 4 **Items 7** Media 0 Notes 0 Tasks 0 History 8

Add Item

Actions ▾ **Reports ▾** Export ▾ Options ▾ ↻

Category	Description	Recovery Date	Status	Storage Location
Electronics	Macbook Air TEST	Feb 1, 2016 12:00:00 AM	Checked In	Temp Lockers New
Documents	Test	Apr 4, 2016 12:00:00 AM	Checked Out	
Documents	Test	Apr 4, 2016 12:00:00 AM	Disposed	
Electronics	Dell Laptop	Jan 8, 2017 1:49:00 PM	Checked In	NJ Temp Storage
Other	Test alcohol	Nov 17, 2001 7:01:00 AM	Checked In	root

Dropdown menu items:

- (TEMPLATE_DO_NOT_DELETE_1213)4x1.5 Primary Label
- (TEMPLATE_DO_NOT_DELETE_1213)4x3 Primary Label
- (TEMPLATE_DO_NOT_DELETE_1213)Chain of Custody
- (TEMPLATE_DO_NOT_DELETE_1213)Container Label
- (TEMPLATE_DO_NOT_DELETE_1213)Item Submission Form
- (TEMPLATE_DO_NOT_DELETE_1213)Transfer Receipt / Acceptance Form
- Arson Evidence Label

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.

Case View

View / Case

Case 10252017

Basic Info **Persons 1** **Items 1** Media 0 Notes 0 Tasks 0 History 1

Add Item

Actions ▾ **Reports ▾** Export ▾ Options ▾ ↻

Include custom people selection

Item #	Split	Category	Description	Rec
1		Vehicle	1961 Ferrari 250 GT SWB California Spider	Oct

Dropdown menu items:

- KSP26
- Property Release / Return to Owner

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

Select People for the Report

Options ▾

🔍

Selected 1 Showing 1 to 1 of 1 items

<input type="checkbox"/>	Name ▾	Email	Person Type	Active
<input checked="" type="checkbox"/>	Ferris Bueller		Person of Interest	🔌

Run Report

Cancel

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.

🔌
Case 16-0001Test001

Basic Info
Persons 4
Items 7
Media 0
Notes 0
Tasks 0
History 8

Add Item

Actions ▾

Reports ▾

Export ▾

Options ▾

↻

	Selected	Org #	Item #	Split	Category	Description	Recovery Date	Status	Storage Location
	All	150022	1		Electronics	Macbook Air TEST	Feb 1, 2016 12:00:00 AM	Checked In	Temp Lockers New
	Subset of Search Results	150091	2		Firearms	Test	Apr 4, 2016 12:00:00 AM	Checked Out	
<input type="checkbox"/>	View	16-0001Test001	150092	3	Firearms	Test	Apr 4, 2016 12:00:00 AM	Disposed	
<input type="checkbox"/>	View	16-0001Test001	150392	4	Electronics	Dell Laptop	Jan 8, 2017 1:49:00 PM	Checked In	NJ Temp Storage

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.

Case 16-0001Test001

Basic Info Persons 4 **Items 7** Media 0 Notes 0 Tasks 0 History 8

Add Item

Actions ▾ Reports ▾ Export ▾ **Options ▾** ↻

Page Size	Primary Case #	Org #	Item #	Split	Category	Description	Recovery Date
10	1Test001	150022	1		Electronics	Macbook Air TEST	Feb 1, 2016 12:00:00 AM
25	1Test001	150091	2		Firearms	Test	Apr 4, 2016 12:00:00 AM
50	1Test001	150092	3		Firearms	Test	Apr 4, 2016 12:00:00 AM
100	1Test001	150392	4		Electronics	Dell Laptop	Jan 8, 2017 1:49:00 PM
Columns	1Test001	150396	5		Alcohol	Test alcohol	Nov 17, 2001 7:01:00 AM
<input checked="" type="checkbox"/> View	1Test001	150412	6		Computer	IBm	Jan 18, 2017 3:42:00 PM
<input checked="" type="checkbox"/> Split History	1Test001	150502	7		Ammunition	1 orange huffy bike	May 17, 2017 12:29:00 PM
<input checked="" type="checkbox"/> Barcode	7 of 7 items						
<input checked="" type="checkbox"/> Item Cases							
<input checked="" type="checkbox"/> Category							
<input checked="" type="checkbox"/> Created By							
<input checked="" type="checkbox"/> Custodian							
<input checked="" type="checkbox"/> Custody Reason							
<input checked="" type="checkbox"/> Created Date							
<input checked="" type="checkbox"/> Description							
<input checked="" type="checkbox"/> Form Data							
<input checked="" type="checkbox"/> Storage Location							
<input checked="" type="checkbox"/> Make							
<input checked="" type="checkbox"/> Media							
<input checked="" type="checkbox"/> Model							
<input checked="" type="checkbox"/> Recovered At							
<input checked="" type="checkbox"/> Recovered By							
<input checked="" type="checkbox"/> Recovery Date							
<input checked="" type="checkbox"/> Item #							
<input checked="" type="checkbox"/> Org #							
<input checked="" type="checkbox"/> Serial Number							
<input checked="" type="checkbox"/> Status							
<input checked="" type="checkbox"/> Primary Case #							
<input checked="" type="checkbox"/> Case Officer							
<input checked="" type="checkbox"/> Tags							
<input checked="" type="checkbox"/> Item Belongs to							

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.

Case 16-00000

Basic Info Persons 0 Items 8 **Media 1** Notes 0 Tasks 0 History 5

Add

Actions Options

Search

Active	Details	Name	Thumbnail	Size	Hash	Primary Case	Uploaded By
<input type="checkbox"/>	Details	Macbook Air.jpg		37.63 kB	580A16F4D3E51845D611D251F3914EFD	16-00000	Rob DCosta (rdcosta@trackerproducts.com)

Showing 1 to 1 of 1 items

First Previous 1 Next Last

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.*

Case 16-00000

Basic Info Persons 0 Items 8 **Media 1** Notes 0 Tasks 0 History 5

Add

Actions Options

Delete

Mass Update

Move

Mass Download

Active	Details	Name	Thumbnail	Size	Hash	Primary Case	Uploaded By
<input type="checkbox"/>	Details	Macbook Air.jpg		37.63 kB	580A16F4D3E51845D611D251F3914EFD	16-00000	Rob DCosta (rdcosta@trackerproducts.com)

Selected 1 Showing 1 to 1 of 1 items

First Previous 1 Next Last

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.



This file(s) will be permanently deleted. There is no undo or recovery. Do you want to proceed?

Cancel Yes

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.

Case 16-00000

Basic Info Persons 0 Items 8 Media 1 Notes 0 Tasks 0 History 5

Add

Actions Options Refresh

Search

<input type="checkbox"/>	Active	Details	Name	Thumbnail	Size	Hash	Primary Case	Uploaded By	Uploaded Date
<input type="checkbox"/>		Details	Macbook Air.jpg		37.63 kB		16-00000	Rob DCosta (rdcosta@trackerproducts.com)	Jun 26, 2017 02:52 PM

Showing 1 to 1 of 1 items

First Previous 1 Next Last

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**.

Case View

View / Case

Case 16-00000

Basic Info Persons 0 Items 8 **Media 2** Notes 0 Tasks 0 History 5

Add

Actions ▾ Options ▾ ↻

Delete 🔍

Mass Update

Move

	is	Name	Thumbnail	Size	Hash	Primary Case	Uploaded By
<input checked="" type="checkbox"/>		Macbook Air.jpg		37.63 kB		16-00000	Rob DCosta (rdcosta@...)
<input type="checkbox"/>		Cell Phone.png		202.79 kB	61BB068BD18E32E0370CF139B38D229F		Rob DCosta (rdcosta@...)

Selected 1 Showing 1 to 2 of 2 items

First Previous 1 Next Last

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

Mass Update Medium

Category No

Description No

Mass updating 1 media

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.

Move Media

File Name: Macbook Air.jpg

Uploaded Date: Jun 26, 2017 02:52 PM

Uploaded By: Rob DCosta (rdcosta@trackerproducts.com)

Hash:

Move to: Case

Case: *

Move Cancel

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.

Case 16-00000

Basic Info Persons 0 Items 8 Media 2 Notes 0 Tasks 0 History 5

Actions Options

Search

Date	Text	Username	Category
------	------	----------	----------

Showing 0 to 0 of 0 items

First Previous 1 Next Last

Text *

Category: Miscellaneous

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.

Case View

View / Case

<input type="checkbox"/>	Active	Details	Update Date	Update Made By	Case Number	Case Officer	Creator
<input type="checkbox"/>		Details	Feb 27, 2017 12:52 PM	Rob DCosta (rdcosta@trackerproducts.com)	16-0000Test	Rob DCosta (rdcosta@trackerproducts.com)	Rob DCosta (rdcosta@trackerproducts.com)
<input type="checkbox"/>		Details	Jan 11, 2017 11:56 AM	Rob DCosta (rdcosta@trackerproducts.com)	16-0000Test	Rob DCosta (rdcosta@trackerproducts.com)	Rob DCosta (rdcosta@trackerproducts.com)

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.

History View

Field	Current Update	Previous Update
Update Made By	Rob DCosta	Rob DCosta
Update Date	Feb 27, 2017 12:52 PM	Jan 11, 2017 11:56 AM
Org / Office	Joe Miller / Tracker Testing Grounds	Joe Miller / Tracker Testing Grounds
Case Number	16-0000Test	16-0000Test
Offense Type	Receiving Stolen Property	Receiving Stolen Property
Case Officer	Rob DCosta (rdcosta@trackerproducts.com)	Rob DCosta (rdcosta@trackerproducts.com)
Offense Location	Walmart Supercenter, Columbu	Walmart Supercenter, Columbu

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.

The screenshot shows a dashboard for 'Tracker Products - Main'. The user is Rob DCosta. The dashboard includes a search bar for cases, a 'Welcome' message, and an 'Add Widget' button. Two main widgets are displayed:

- Org Items by Category (Graph):** A donut chart showing the distribution of 133,695 total items. The categories and their counts are:
 - Drugs - 50,718
 - Miscellaneous Items - 48,291
 - Weapon (Not Firearm) - 11,107
 - Clothing - 7,098
 - Vehicle - 5,408
 - Others - 11,073
- Org In v/s Disposed (Graph):** A line graph comparing 'In Items' (green line) and 'Disposed Items' (blue line) from November to October. The Y-axis ranges from 0 to 200. A significant peak in disposed items is visible in August, reaching approximately 100. The X-axis labels are: November, December, January, February, March, April, May, June, July, August, September, October.

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.

Search Parameters

Created By equals [text input] Current User

Created Date before [calendar icon] [text input]

Description equals [text input]

Custody Reason equals [text input]

Recovery Date before [calendar icon] [text input]

Recovered At equals [text input]

Status equals [text input]

Recovered By equals [text input]

Storage Location equals [text input] type 'Y' or start typing a location name Include Sublocations

Category equals [text input]

Make equals [text input]

Model equals [text input]

Serial Number equals [text input]

Org # equals [text input]

Item # equals [text input]

Item Belongs to equals [text input] Persons for search [text input]

Custodian equals [text input]

Tags equals [text input] Tags for search [text input]

Offices equals [text input] Joe Miller - Tracker Testing Grounds

Saved Searches of Cases equals [text input]

Saved Searches of Disposals equals [text input]

Saved Searches of Check Ins equals [text input]

Saved Searches of Check Outs equals [text input]

Saved Searches of Moves equals [text input]

Saved Searches of Transfers equals [text input]

Search History [text input] [FF]

Search in Custom Data [text input] [FF]

[Search] [Clear] [Save]

Items

[Add Item]

[Actions] [Reports] [Export - Options] [Refresh]

View	Primary Case #	Org #	Item #	Split	Category	Description	Recovery Date	Status	Storage Location	Created By	Created Date	Barcode
Showing 0 to 0 of 0 items												
First	Previous	1	Next	Last								

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.

The screenshot shows a 'Search History' panel with an 'ON' toggle. Below the toggle are two rows of controls. The first row is for 'Update Made By', featuring a dropdown menu with 'equals' selected and an empty text input box to its right. The second row is for 'Update Date', featuring a dropdown menu with 'before' selected, a calendar icon, and an empty text input box to its right.

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.

The screenshot shows a 'Search in Custom Data' panel with an 'ON' toggle. Below the toggle is a 'Custom Data (Form)' dropdown menu with 'Drug Form (Sys Template)' selected. Below this are 'Preview' and 'Remove' buttons. The 'Field' section contains a dropdown menu with 'Send Item to Lab' selected, followed by an 'equals' dropdown menu. Below these are two checkboxes: 'Send Item to Lab' (checked) and 'Anything in form' (unchecked). A large blue button with a white plus sign is centered below the form.

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).

Items

[Add Item](#)

[Actions](#) [Reports](#) [Export](#) [Options](#) [Refresh](#)

Showing 1 to 13 of 13 items

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

Showing 1 to 13 of 13 items

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.

Item

Basic Info	Cases 1	Media 0	Notes 0	Tasks	Chain of Custody	Scan History	History 7
Org #	150022						
Item #	1						
Case	16-0001Test001						
Status	Checked In						
Recovered At	Wally Wash Laundromat, Karl Road, Columbus, OH, United States						
Recovery Date	Feb 1, 2016 12:00 AM						
Recovered By							
Storage Location	Temp Lockers New						
Submitted By	Rob DCosta (rdcosta@trackerproducts.com)						
Category	Electronics						
Custody Reason	Evidence						
Barcode	1ef5b3c4-ffb5-4457-ab39-31ace195a1ab						
Description	Macbook Air TEST						
Item Belongs to	No Persons						
Custodian							
Tags	Electronics						

Edit Actions - Reports -

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.

Manage Cases for Macbook Air

☆ x	15-06013975
★	16-0000Test

Add to case *

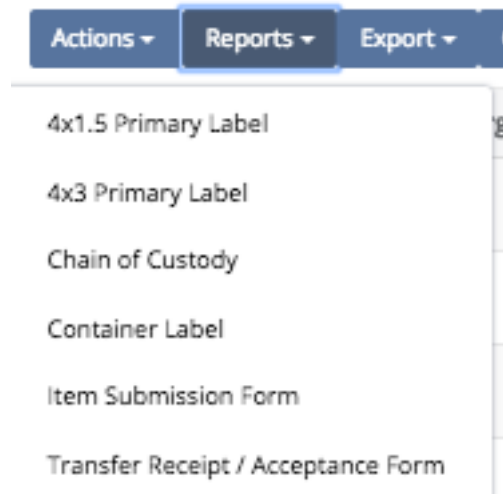
Add To Case

Finish Editing

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!

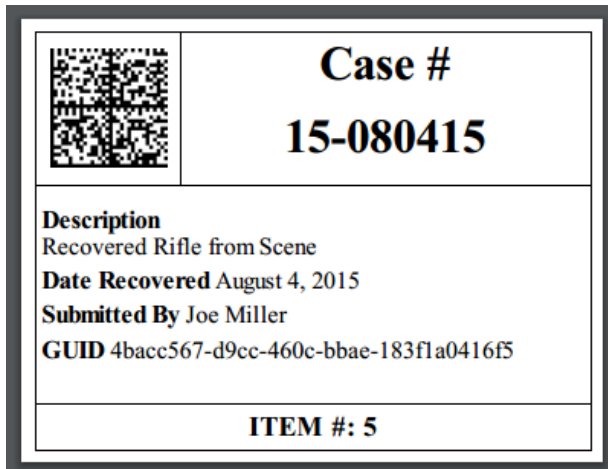
Running a Report and Printing an Item Label

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

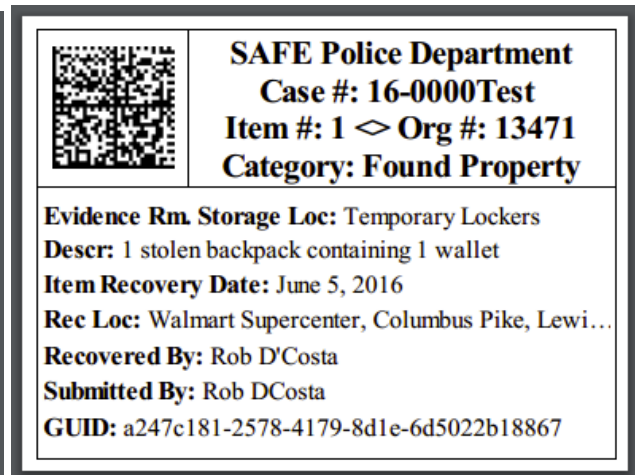


If you decide to **Print a Label or Report** for the **Item**, the software will automatically create an Adobe Acrobat file (.pdf) and the **Label or Report** will appear.

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.

Item

Item								
Basic Info		Cases 2	Media 2	Notes 0	Tasks	Chain of Custody	Scan History	History 26
Actions ▾ Reports ▾ Export ▾ Options ▾ ↻								
<input type="checkbox"/>	View	Active	Case Number	Office	Case Officer	Created By	Offense Type	Offense Description
<input type="checkbox"/>	View		15-06013975	Tracker Testing Grounds	Joe R Miller	Joe R Miller	Receiving Stolen Property	Traffic Stop resulted in firearm in Backseat
<input type="checkbox"/>	View		16-0000Test	Tracker Testing Grounds	Rob DCosta	Rob DCosta	Receiving Stolen Property	

Showing 1 to 2 of 2 items

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.

Item View

View / Item

Item									
Basic Info		Cases 1	Media 1	Notes 0	Tasks	Chain of Custody	Scan History	History 7	
Add Actions ▾ Options ▾ ↻									
<input type="text" value="Search"/>									
<input type="checkbox"/>	Active ▾	Details	Name	Thumbnail	Size	Hash	Primary Case	Uploaded By	Uploaded Date
<input type="checkbox"/>		Details	MacBook Air.jpg		37.63 kB	580A16F4D3E51845D611D251F3914EFD		Rob DCosta (rdcosta@trackerproducts.com)	Jun 26, 2017 05:05 PM

Showing 1 to 1 of 1 items

First Previous 1 Next Last

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.

Media Chain of Custody

Save as PDF



Primary Case	16-0001Test001
Description	Macbook Air TEST
Item #	1
File Name	Macbook Air.jpg
Uploaded Date	Jun 26, 2017 05:05 PM
Uploaded By	Rob DCosta
Hash	580A16F4D3E51845D611D251F3914EFD
Description	
Category	
Location	Safe Cloud

Media Details	<p>JPEG Compression Type: Baseline Data Precision: 8 bits Image Height: 270 pixels Image Width: 455 pixels Number of Components: 3 Component 1: Y component: Quantization table 0, Sampling Component 2: Cb component: Quantization table 1, Samplir Component 3: Cr component: Quantization table 1, Samplin</p> <p>JPEGCOMMENT JPEG Comment: CREATOR: gd-jpeg v1.0 (using IJG JPEG v62).</p> <p>JFIF Version: 1.1 Resolution Units: none X Resolution: 1 dot Y Resolution: 1 dot Thumbnail Width Pixels: 0 Thumbnail Height Pixels: 0</p> <p>FILE File Name: Macbook Air.jpg File Size: 38536 bytes File Modified Date: Monday, June 26, 2017 9:05:11 PM</p>
----------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Rekey Options -

Date -	Name	Activity	Notes
Jun 26, 2017 05:05 PM	Rob DCosta	Create	

Showing 1 to 1 of 1 items

First Previous 1 Next Last

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**.

Item View

View / Item

Item

Basic Info Cases **1** Media **1** **Notes 1** Tasks Chain of Custody Scan History History **7**

Actions Options Refresh

Search

Date	Text	Username	Category
Jun 26, 2017 05:11 PM	This Macbook Air was taken for evidence	Rob DCosta (rdcosta@trackerproducts.com)	Miscellaneous

Showing 1 to 1 of 1 items

First Previous **1** Next Last

Text *

Category Miscellaneous

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.

Item

Basic Info Cases **1** Media **1** Notes **1** **Tasks** Chain of Custody Scan History History **7**

Search Tasks

Open
 Closed

Add Task Tasks stream Actions Refresh

Details	Task #	Creation Date	Subject	Created by	Assigned to	Last Action
---------	--------	---------------	---------	------------	-------------	-------------

Showing 0 to 0 of 0 items

First Previous **1** Next Last

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.

Item

Basic Info	Cases 1	Media 1	Notes 1	Tasks	Chain of Custody	Scan History	History 7
------------	---------	---------	---------	-------	-------------------------	--------------	-----------

Chain of Custody

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.

Item

Basic Info	Cases 1	Media 1	Notes 1	Tasks	Chain of Custody	Scan History	History 7
------------	---------	---------	---------	-------	------------------	---------------------	-----------

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.

Item View

View / Item

<input type="checkbox"/>	Details	Update Date ▾	Update Made By	Description	Recovery Date	Status	Storage Location
<input type="checkbox"/>	Details	Jun 26, 2017 05:33 PM	Rob DCosta (rdcosta@trackerproducts.com)	1 bottle of cognac	Sep 5, 2016 08:00 PM	Disposed	
<input type="checkbox"/>	Details	Sep 29, 2016 05:00 PM	Rob DCosta (rdcosta@trackerproducts.com)	1 bottle of cognac	Sep 6, 2016 12:00 AM	Checked In	root

Showing 1 to 2 of 2 Items

First Previous 1 Next Last

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 on the right was the previous update. In addition to that, red values reflect changes that were made in the most recent update.

History View

History 59517dba1b5c5e1bbc0fe85a

Update Made By: Rob DCosta

Update Date: Jun 26, 2017 05:33 PM

Org #: 13483

Item #: 2

Case: 16-00000

Status: Disposed

History 57ed80e61b5c5e1454bfa416

Update Made By: Rob DCosta

Update Date: Sep 29, 2016 05:00 PM

Org #: 13483

Item #: 2

Case: 16-00000

Status: Checked In

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.

Advanced Search
Advanced Search / People

Search Parameters

Business name	equals	<input type="text"/>
First name	equals	<input type="text"/>
Middle name	equals	<input type="text"/>
Last name	equals	<input type="text"/>
Driver's license	equals	<input type="text"/>
Alias	equals	<input type="text"/>
Mobile phone	equals	<input type="text"/>
Other phone	equals	<input type="text"/>
Email	equals	<input type="text"/>
Date of Birth	before	<input type="text"/>
Race	equals	<input type="text"/>
Gender	equals	<input type="text"/>
Deceased	equals	<input type="text"/>
Juvenile	equals	<input type="text"/>
Active	equals	<input type="text"/>

Search History

Search in Custom Data

Persons

Actions - - -

<input type="checkbox"/>	View	Business Name	First Name	Middle Name	Last Name	Alias	Driver's License	Mobile Phone	Other Phone	Email	Date of Birth	Race	Gender	Deceased
--------------------------	------	---------------	------------	-------------	-----------	-------	------------------	--------------	-------------	-------	---------------	------	--------	----------

Showing 0 to 0 of 0 items

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.

The screenshot shows a user interface for 'Search History'. At the top right, there is a toggle switch labeled 'ON'. Below this, there are two rows of controls. The first row is for 'Update Made By', featuring a dropdown menu currently showing 'equals' and an empty text input box to its right. The second row is for 'Update Date', featuring a dropdown menu currently showing 'before' and a date picker icon (calendar) next to an empty text input box to its right.

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.

Advanced Search

Advanced Search / People

<input type="checkbox"/>	View	First Name	Last Name	Driver's License	Mobile Phone	Other Phone	Email	Date of Birth	Race	Gender	Active	Barcode
<input type="checkbox"/>	View	Bob	Smith	zf3672345	123-456-7890		bsmith@email.com	February 4, 1981	Unknown	Male		4c90a3ea-
<input type="checkbox"/>	View		Dan Dolly	2					Hispanic	Male		a31133ba-

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.

Date	Type	Address	Username
(No addresses)			

Add Address

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>

Advanced Search

Advanced Search / Disposal

Advanced Search / Disposal

Search Parameters

Disposed By: equals, , Current User

Dispose Date: before,

Notes: equals,

Disposal Method: equals,

Offices: equals, Tracker Products - Main

Search Clear Save

Disposals

Export Options

Dispose Date	Disposed By	Disposal Method	Notes	Items
--------------	-------------	-----------------	-------	-------

Showing 0 to 0 of 0 rows

First Previous 1 Next Last

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.

Advanced Search

Advanced Search / **Check In**

Search Parameters ▼

Returned By equals ▾

Checked In By equals ▾

Current User

Check In Date before ▾

Location equals ▾

Include Sublocations

Notes equals ▾

Offices equals

Check Ins

<input type="checkbox"/> Transaction Date ▼	Returned By	Checked In By	Location	Notes	Items
Showing 0 to 0 of 0 rows					

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.

Advanced Search

[Advanced Search](#) / [Check Out](#)

Search Parameters ▼

Taken By	equals	
Checked out by	equals	
	<input type="checkbox"/>	Current User
Check Out Date	before	<input type="text"/>
Reason	equals	
Notes	equals	
Expected Return Date	before	<input type="text"/>
Offices	equals	Tracker Products - Main ×

Check Outs

<input type="checkbox"/>	Transaction Date ▼	Taken By	Checked out by	Reason	Notes	Expected Return Date	Items
--------------------------	--------------------	----------	----------------	--------	-------	----------------------	-------

Showing 0 to 0 of 0 rows

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.

Advanced Search

Advanced Search / **Move**

Search Parameters

Moved By: equals [dropdown] [input field] Current User

Moved To: equals [dropdown] [input field: type '/' or start typing a location name] Include Sublocations

Move Date: before [dropdown] [calendar icon] [input field]

Notes: equals [dropdown] [input field]

Offices: equals [input field: Tracker Products - Main x]

Search Clear Save

Moves

Export Options Refresh

<input type="checkbox"/> Transaction Date	Moved By	Moved To	Notes	Items
Showing 0 to 0 of 0 rows				

First Previous 1 Next Last

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.

Advanced Search

Advanced Search / **Transfer**

Search Parameters

Transfer From equals Current User

Transfer To equals

Transfer Date before

Notes equals

Offices equals

Transfers

<input type="checkbox"/> Transaction Date	Transfer From	Transfer To	Notes	Items
-------------------------------------------	---------------	-------------	-------	-------

Showing 0 to 0 of 0 rows

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.

Advanced Search

Advanced Search / **Note**

Search Parameters ▼

User equals Current User

Date before

Text equals

Category equals

Notes Type equals

Offices equals Tracker Products - Main

Notes

<input type="checkbox"/>	View	Date	Text	Username	Category	Type
--------------------------	------	------	------	----------	----------	------

Showing 0 to 0 of 0 items

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.

Advanced Search

Advanced Search / [Media](#)

Search Parameters

Type	equals	
Active	equals	
Name	equals	
Description	equals	
Uploaded By	equals	<input type="checkbox"/> Current User
Uploaded Date	before	<input type="text"/>
Category	equals	
Media Details	contains	
Offices	equals	Tracker Products - Main

Media

<input type="checkbox"/>	Active	View	Details	Name	Thumbnail	Size	Hash	Primary Case	Uploaded By	Uploaded Date	Category	Type	Description	Location
--------------------------	--------	------	---------	------	-----------	------	------	--------------	-------------	---------------	----------	------	-------------	----------

Showing 0 to 0 of 0 rows

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.

Advanced Search

Advanced Search / Task

Search Parameters

Task #	equals	
Created by	equals	<input type="checkbox"/> Current User
Subject	equals	
Message	equals	
Creation Date	before	<input type="text"/>
Status	equals	
Notes	contains	
Offices	equals	Tracker Products - Main
Assign to users	equals	Users...
Assign to user groups	equals	User groups...

Tasks

Actions - Options -

<input type="checkbox"/>	View	Task #	Creation Date -	Subject	Message	Created by	Status	Update Date
--------------------------	------	--------	-----------------	---------	---------	------------	--------	-------------

Showing 0 to 0 of 0 items

First Previous 1 Next Last

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.

Export Jobs

Export Jobs

Exports List - Exports get deleted after 7 days.

Actions ▾ Options ▾ ↻

Search

<input type="checkbox"/>	Search ▲	Start Date	Complete Date	Status	Percent Complete	Download Link
<input checked="" type="checkbox"/>	Items	Jun 27, 2017 10:42 AM	Jun 27, 2017 10:42 AM	Complete	100	Download

Selected 1 Showing 1 to 1 of 1 items

First Previous 1 Next Last

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.

Tracker Products - Main ▾

Welcome
Dashboard

Add Widget ▾

Org Items by Category (Graph)

Category	Count
Drugs	50,714
Miscellaneous Items	48,291
Weapon (Not Firearm)	11,107

Total Item count: 133,654

Org In v/s Disposed (Graph)

Month	In items	Disposed items
August	15	2
September	18	3
October	20	5
November	25	25
December	28	5
January	30	2
February	10	2
March	35	5
April	12	3
May	30	2
June	15	2
July	5	1

Jun 27, 2017 10:43:40 AM

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.

The screenshot shows the Tracker Products dashboard for user Rob DCosta. The interface includes a top navigation bar with a search box and a main content area with two data widgets. A left sidebar contains navigation options like Dashboard, Recent Cases, Add, Search, Scan, Tasks (2), Settings, Discrepancy Reports, System, User Settings, Help, and Logout.

Org Items by Category (Graph)

Total Item count: 133,695

Category	Count
Drugs	50,718
Miscellaneous Items	48,291
Weapon (Not Firearm)	11,107
Clothing	7,098
Vehicle	5,408
Others	11,073

Oct 3, 2017 2:50:57 PM

Org In v/s Disposed (Graph)

Legend: In items (green), Disposed items (blue)

Oct 3, 2017 2:50:57 PM

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**.

Tracker Products - Main | Find a Case...

Welcome
Dashboard

Add Widget

Org Items by Category (Graph)

Org Items by Category (Graph)

Total Item count: 133,695

Drugs	50,718
Miscellaneous Items	48,291
Weapon (Not Firearm)	11,107
Clothing	7,098
Vehicle	5,408
Others	11,073

Oct 3, 2017 2:50:57 PM

Org In v/s Disposed (Graph)

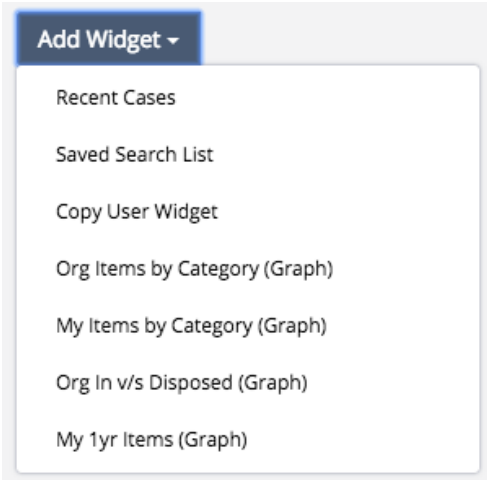
Org In v/s Disposed (Graph)

In items

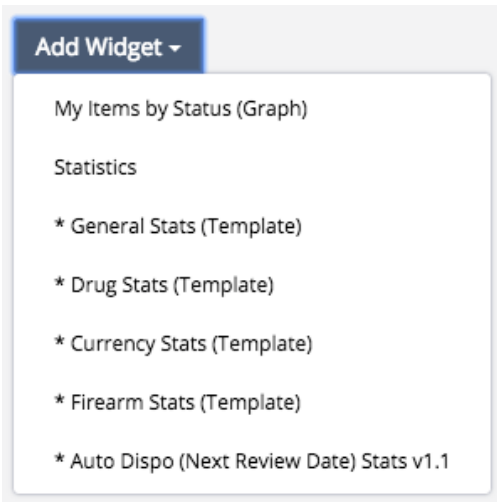
Disposed items

Oct 3, 2017 2:50:57 PM

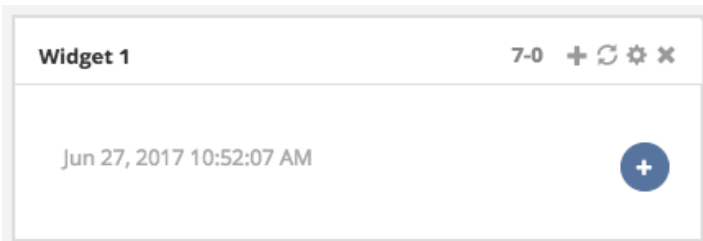
3. If none of the pre-made Widgets are what you require, you may create your own. From the **Dashboard** screen, do a **Search** on **Cases**, **Items**, or **People**. Enter your parameters and then click the **Save** box to **Save** that **Search**. Next, from your **Dashboard**, click the **Add Widget**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

Add Statistic

Saved Search	<input type="text"/>	*
Title	<input type="text" value="title"/>	*
Field	<input type="text"/>	
Function	<input type="text" value="COUNT"/>	
Format	<input type="text" value="None"/>	


Save

Cancel

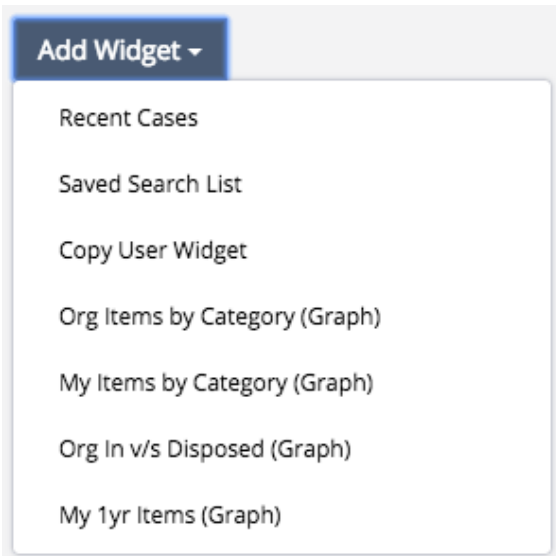
Give your **Statistic Widget** a **Title**. Next click the **Saved Search** box and choose from one of your saved searches. Then select a **Field**, **Function** and possibly **Format** and click **Save** (these will be auto-populated for you, so all you really need to do is click save). Your newly created **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**.

Items	7-0 + ↻ ⚙ ×
All Items Last 30 Days ✓	0
All Items Last 365 Days ✓	43

✓ = All data in all Offices / ✓ = All data in some Offices

Jun 27, 2017 10:58:11 AM 

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.

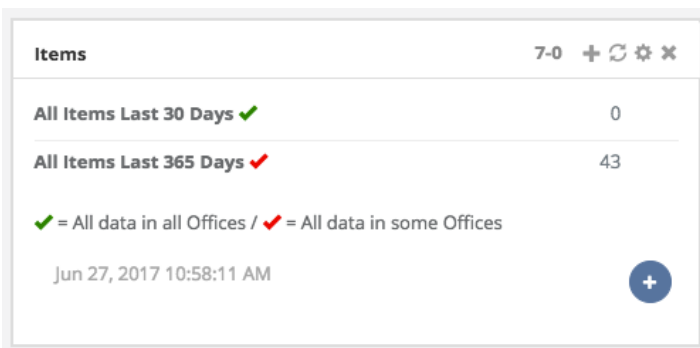
Enter Widget Id To Copy

Widget Id *

Ok Cancel

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

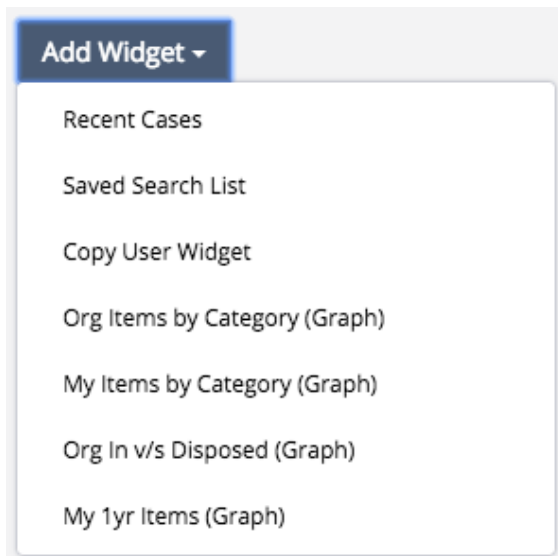
5. Initially, a Widget is rather wide. To 'scrunch' your Widget, put your mouse cursor over the right edge of the Widget (until you see the double arrow <->), then click and drag to the left. Your widget will then be smaller, allowing you to place more of them in the same space.



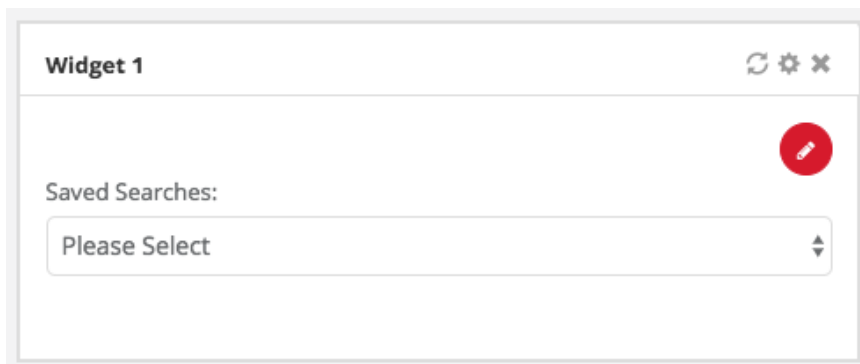
Deleting Saved Searches

[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.

Manage

All_Firearms	
All Drugs Not Disposed of in 2015	
All Drugs Not Disposed of in 2002	
All Drugs Checked In, in 2002	
All Offenses in 2002	
Items not disposed of - TEST	
All Drugs Checked In in 2013	
Drugs Checked In, in 2015	
All Checked In Items	
All Checked Out Items	

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.



Are you sure you want to delete this?

Cancel

Yes

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.

Scan

Scan Items

Barcode [Mass Import List](#)

Barcodes Scanned

Items

[Add Item](#) [Clear](#)

[Actions](#) [Reports](#) [Export](#) [Options](#) [Refresh](#)

<input type="checkbox"/>	View	Primary Case #	Org #	Item #	Split	Category	Description	Recovery Date	Status	Storage Location	Created By	Created
--------------------------	------	----------------	-------	--------	-------	----------	-------------	---------------	--------	------------------	------------	---------

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.

Add barcodes

```
c5c3ff8d-285b-e511-a0e6-06e9f5d49c4d
21ed3496-d957-e511-a0e6-06e9f5d49c4d
23ed3496-d957-e511-a0e6-06e9f5d49c4d
b91a48d2e-5ae5-e511-812d-0290fb8c2e93
```

(You can add several at a time not more 500, 1 per line.)

[Save](#) [Cancel](#)

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).

Scan

Scan items

Barcode [Mass Import List](#)

Barcodes Scanned

Items

[Add Item](#) [Clear](#)

[Actions](#) [Reports](#) [Export](#) [Options](#) [Refresh](#)

<input type="checkbox"/>	View	Primary Case #	Org #	Item #	Split	Category	Description	Recovery Date	Status	Storage Location	Created By
--------------------------	------	----------------	-------	--------	-------	----------	-------------	---------------	--------	------------------	------------

Tasks

[Quick Menu » Tasks](#)

Open
 Closed

[Add Task](#) [Tasks stream](#) [Actions](#) [↻](#)

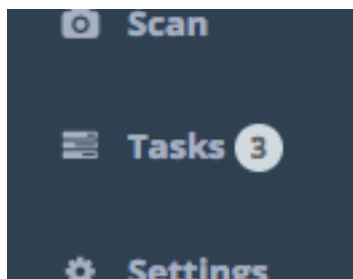
<input type="checkbox"/>	Details	Task #	Creation Date	Subject	Created by	Assigned to	Last Action
<input type="checkbox"/>	Details	D912FA0B	Jun 27, 2017 03:00 AM	Case Review for 15-26535	Benjamin Townsend (ben@trackerproducts.com)	Ben Townsend Gmail	Jun 27, 2017 10:10 AM
<input type="checkbox"/>	Details	2E35C481	Jun 27, 2017 03:00 AM	Case Review for 15-26532	Benjamin Townsend (ben@trackerproducts.com)	Ben Townsend Gmail	Jun 27, 2017 03:00 AM

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:

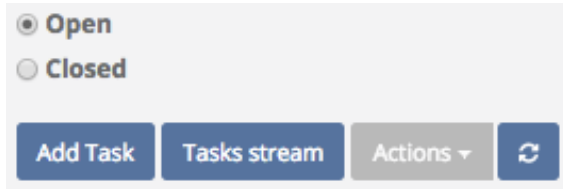
1. User A needs information from User B.
2. User A initiates a system Task.
3. User A fills in the task screen with information such as who the task is for (User B) along with a subject line and description.
4. Upon submission User B will receive an email indicating that they have received a task from 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



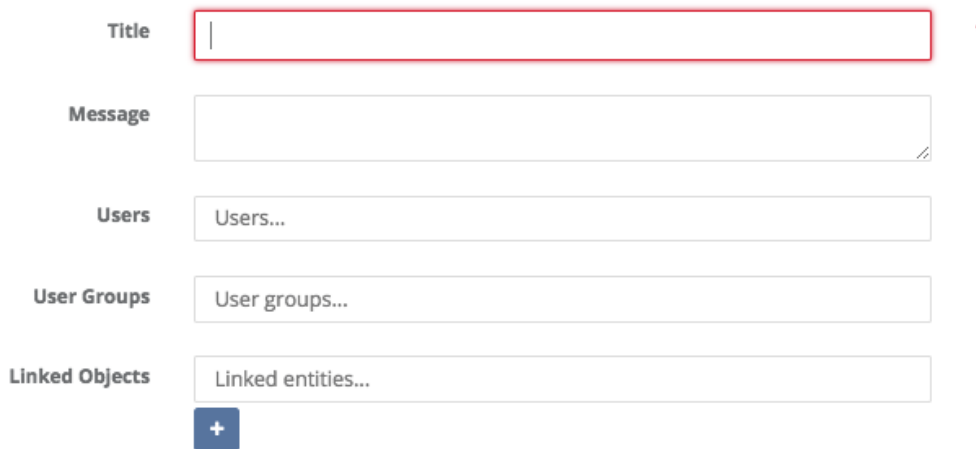
The menu bar (on the left) will have a link to the Tasks page along with a (#) that shows how many open tasks are assigned to you or in a group that you are a part of. Click on either of these options and you will be directed to the Tasks page.

Creating a Task



A control bar for task creation. It features two radio buttons: 'Open' (selected) and 'Closed'. Below the buttons are four action buttons: 'Add Task' (dark blue), 'Tasks stream' (light blue), 'Actions' (grey with a dropdown arrow), and a refresh icon (blue square with a white circular arrow).

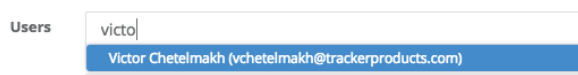
Click the 'Add Task' button to begin to generate a Task.



A form for creating a task. It has five main sections: 'Title' (a text input field with a red border and a red asterisk to its right), 'Message' (a large text area), 'Users' (a text input field with 'Users...' placeholder), 'User Groups' (a text input field with 'User groups...' placeholder), and 'Linked Objects' (a text input field with 'Linked entities...' placeholder). Below the 'Linked Objects' field is a blue square button with a white plus sign.

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.



A dropdown menu for selecting a user. The label 'Users' is to the left of the input field. The input field contains the text 'victo'. Below the input field, a blue highlight shows the selected option: 'Victor Chetelmakh (vchetelmakh@trackerproducts.com)'.

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.

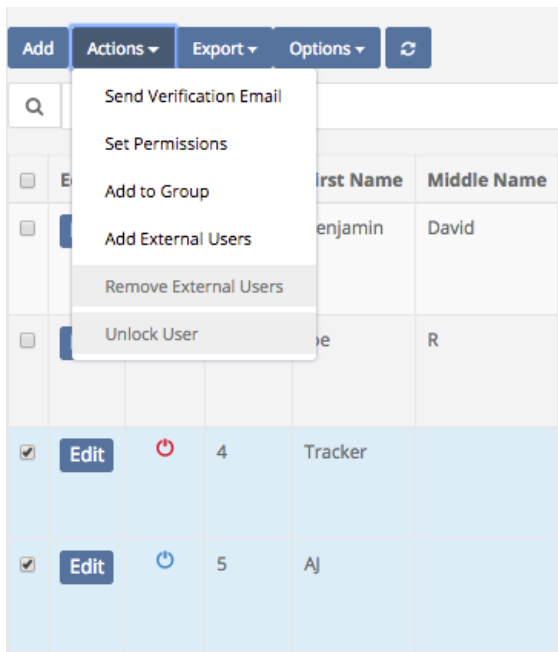
Linked Object – This is where you can associate a Task with a Case(s), Person(s) or Item(s).

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.

Items

Add Item

Actions ▾ Reports ▾ Export ▾ Options ▾ ↻

<input type="checkbox"/>	View	Primary Case #	Org #	Item #	Split	Category	Description	Recovery Date	Status	Storage Location
<input type="checkbox"/>	View	Report_Test_1	150527	8		Alcohol	Sergey Test	Jun 21, 2017 6:50:00 AM	Checked In	Temp Lockers New
<input type="checkbox"/>	View	2017-0109	150528	21		Camera	Panasonic camera	Nov 27, 2016 5:14:00 AM	Checked In	root

Showing 1 to 2 of 2 items

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

Add Items to Task

Existing

New

Title

*

Go to Selected Task

Adding 2 items to task

Ok

Cancel

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.

New

Adding 1 item to task

Create Task

Cancel

Click Create Task.

Title

Message

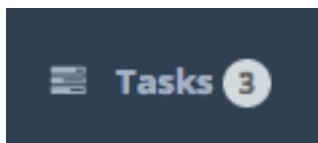
Users

User Groups

Linked Objects

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.

<input type="checkbox"/>	Details	Task #	Creation Date	Subject	Created by	Assigned to	Last Action ▾
<input type="checkbox"/>	Details	50BA417D	Jun 27, 2017 04:58 PM	Test	Mike Singleton (msingleton@trackerproducts.com)	Rob DCosta	Jun 27, 2017 04:58 PM
<input type="checkbox"/>	Details	FE222DDF	Jun 27, 2017 04:56 PM	Test2	Mike Singleton (msingleton@trackerproducts.com)	Rob DCosta	Jun 27, 2017 04:56 PM
<input type="checkbox"/>	Details	57F942B9	Jun 27, 2017 04:55 PM	Test Task	Mike Singleton (msingleton@trackerproducts.com)	Rob DCosta	Jun 27, 2017 04:55 PM
<input type="checkbox"/>	Details	D912FA0B	Jun 27, 2017 03:00 AM	Case Review for 15-26535	Benjamin Townsend (ben@trackerproducts.com)	Ben Townsend Gmail	Jun 27, 2017 10:10 AM

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.

Open
 Closed

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.


Task: D912FA0B


Subject: Case Review for 15-26535 **Created by:** Benjamin Townsend (ben@trackerproducts.com)
Status: New **Creation Date:** Jun 27, 2017 03:00 AM
Last Action Date: Jun 27, 2017 10:10 AM **Message:** Case 15-26535 is up for review, please respond to this task with further information

Assigned to:
Ben Townsend Gmail

Linked Objects:
15-26535
PHOTOS - orgNumber 88177 (Drugs)

Edit Task Close task

 **Benjamin Townsend (ben@trackerproducts.com)**
Hey, get rid of everything
Jun 27, 2017 10:10 AM

 **Mike Singleton (msingleton@trackerproducts.com)**
The item(s) PHOTOS - orgNumber 88177 (Drugs) was attached to task.
Jun 27, 2017 04:54 PM

Add Note

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.

Notice: Task notification



do_not_reply@trackerproducts.com via amazonses.com

to

Task #50BA417D has been created by Mike Singleton. [Click here to view the Tasks](#)

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.

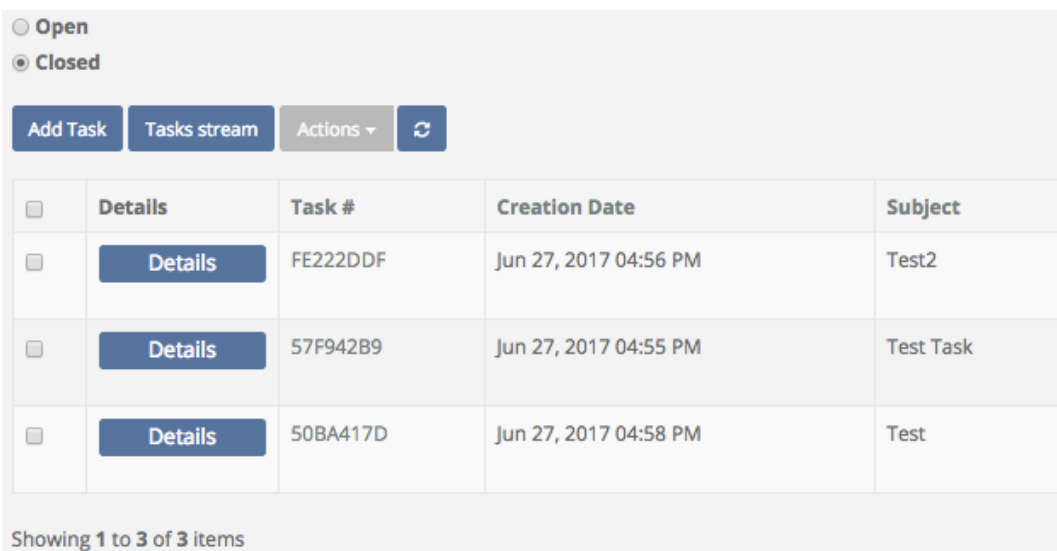
Edit a Task

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 vice versa. From the Task menu you can open or close more than one task at a time.



The screenshot shows a task management interface. At the top, there are radio buttons for 'Open' and 'Closed', with 'Closed' selected. Below this are buttons for 'Add Task', 'Tasks stream', 'Actions' (with a dropdown arrow), and a refresh icon. The main area is a table with three rows of tasks. Each row has a checkbox, a 'Details' button, a 'Task #' column, a 'Creation Date' column, and a 'Subject' column. The tasks are: 1) Task # FE222DDF, Creation Date Jun 27, 2017 04:56 PM, Subject Test2; 2) Task # 57F942B9, Creation Date Jun 27, 2017 04:55 PM, Subject Test Task; 3) Task # 50BA417D, Creation Date Jun 27, 2017 04:58 PM, Subject Test. At the bottom, it says 'Showing 1 to 3 of 3 items'.

<input type="checkbox"/>	Details	Task #	Creation Date	Subject
<input type="checkbox"/>	Details	FE222DDF	Jun 27, 2017 04:56 PM	Test2
<input type="checkbox"/>	Details	57F942B9	Jun 27, 2017 04:55 PM	Test Task
<input type="checkbox"/>	Details	50BA417D	Jun 27, 2017 04:58 PM	Test

Showing 1 to 3 of 3 items

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.

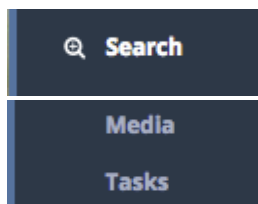
Task Security

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.

Moves		<input checked="" type="checkbox"/> *
Transfers		<input checked="" type="checkbox"/>
Tasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.

Search Parameters



Task #	equals	
Created by	equals	<input type="checkbox"/> Current User
Subject	equals	
Message	equals	
Creation Date	before	<input type="text"/>
Status	equals	
Notes	contains	
Offices	equals	Tracker Products - Main
Assign to users	equals	Users...
Assign to user groups	equals	User groups...

Tasks

Actions Options

	View	Task #	Creation Date	Subject	Message	Created by	Status	Update Date
--	------	--------	---------------	---------	---------	------------	--------	-------------

Showing 0 to 0 of 0 items

First Previous 1 Next Last

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'.

Case 05252017

Basic Info Persons 0 Items 0 Media 0 Notes 0 **Tasks 2** History 2

Search Tasks

Open
 Closed

Add Task Tasks stream Actions ▾ ↻

<input type="checkbox"/>	Details	Task #	Creation Date	Subject	Created by	Assigned to	Last Action ▾
<input type="checkbox"/>	Details	57F942B9	Jun 27, 2017 04:55 PM	Test Task	Mike Singleton (msingleton@trackerproducts.com)	Rob DCosta	Jun 28, 2017 12:42 PM
<input type="checkbox"/>	Details	FE222DDF	Jun 27, 2017 04:56 PM	Test2	Mike Singleton (msingleton@trackerproducts.com)	Rob DCosta	Jun 28, 2017 12:42 PM

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.

Tasks stream

Export ▾ Options ▾ ↻

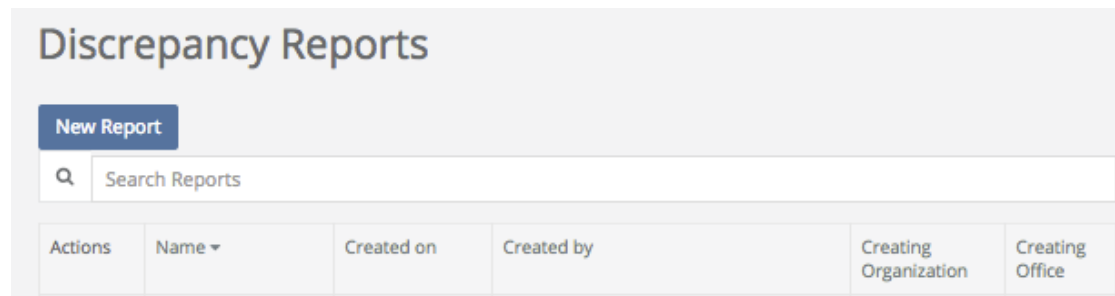
<input type="checkbox"/>	View	Task #	Creation Date ▾	Text
<input type="checkbox"/>	View	DE7E01B	Jun 8, 2017 11:44 AM	Please dispose immediately, he/she plead out.
<input type="checkbox"/>	View	DE7E01B	Jun 8, 2017 12:25 PM	Ok, will get rid of now.
<input type="checkbox"/>	View	8FDC9F78	Jun 19, 2017 06:30 PM	Yes, get rid of htis
<input type="checkbox"/>	View	72C48E15	Jun 23, 2017 10:57 AM	The item(s) Panasonic camera - orgNumber 150370 (Camera), 6 pack bud light - orgNumber 150371
<input type="checkbox"/>	View	72C48E15	Jun 23, 2017 10:58 AM	Hey Larry, these are ready for pickup.

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

Discrepancy Reports

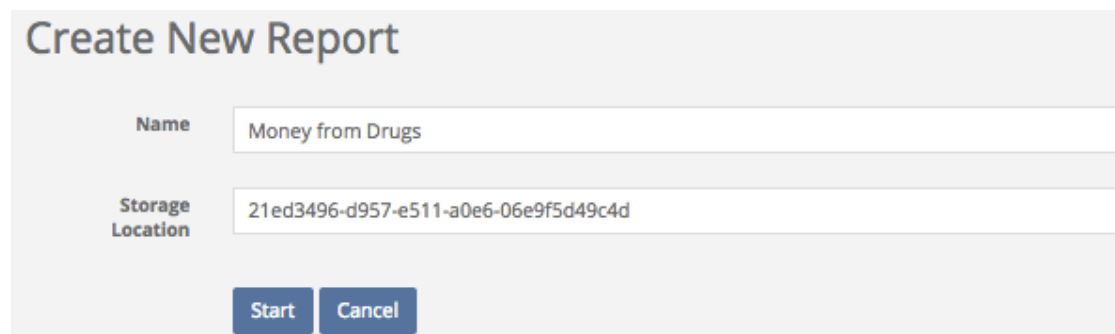
[Quick Menu » Discrepancy Reports](#)

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.



The screenshot shows the 'Discrepancy Reports' page. At the top left is a blue button labeled 'New Report'. Below it is a search bar with a magnifying glass icon and the text 'Search Reports'. Underneath the search bar is a table with the following columns: 'Actions', 'Name', 'Created on', 'Created by', 'Creating Organization', and 'Creating Office'.

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.



The screenshot shows the 'Create New Report' form. It has two input fields: 'Name' with the value 'Money from Drugs' and 'Storage Location' with the value '21ed3496-d957-e511-a0e6-06e9f5d49c4d'. At the bottom are 'Start' and 'Cancel' buttons.

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

Money from Drugs

Scanned Barcodes

Scanned Barcode	Scanned In
-----------------	------------

Scanning items in: Drugs

Storage Location	Storage Location Barcode
Drugs	21ed3496-d957-e511-a0e6-06e9f5d49c4d
Money	d576ebe5-265b-e511-a0e6-06e9f5d49c4d

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. **

Money from Drugs

Scanned Barcodes

Scanned Barcode	Scanned In
f1f0d46f-0ce6-446d-82e5-cd270ee46254	Drugs

Scanning items in: Drugs

Storage Location	Storage Location Barcode
Drugs	21ed3496-d957-e511-a0e6-06e9f5d49c4d
Money	d576ebe5-265b-e511-a0e6-06e9f5d49c4d

Discrepancy Reports

Actions	Name ▾	Created on	Created by	Creating Organization	Creating Office
<input type="button" value="Print"/> <input type="button" value="View"/>	Money from Drugs	Jul 3, 2017 04:16 PM	Rob DCosta (rdcosta@trackerproducts.com)	Joe Miller	Tracker Testing Grounds

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.

Enable Google Authenticator

1. Add Tracker Products to Google Authenticator

Open Google Authenticator and add Tracker by scanning the QR Code to the right.

2. Enter the 6 digit code that Google Authenticator generates

Verify that Tracker is added correctly in Google Authenticato by entering the 6 digit code which Google Authenticator generates for Tracker and then click Enable

Code

Enable



J5KTSWBVLJDUGOCBIFBA

Ok

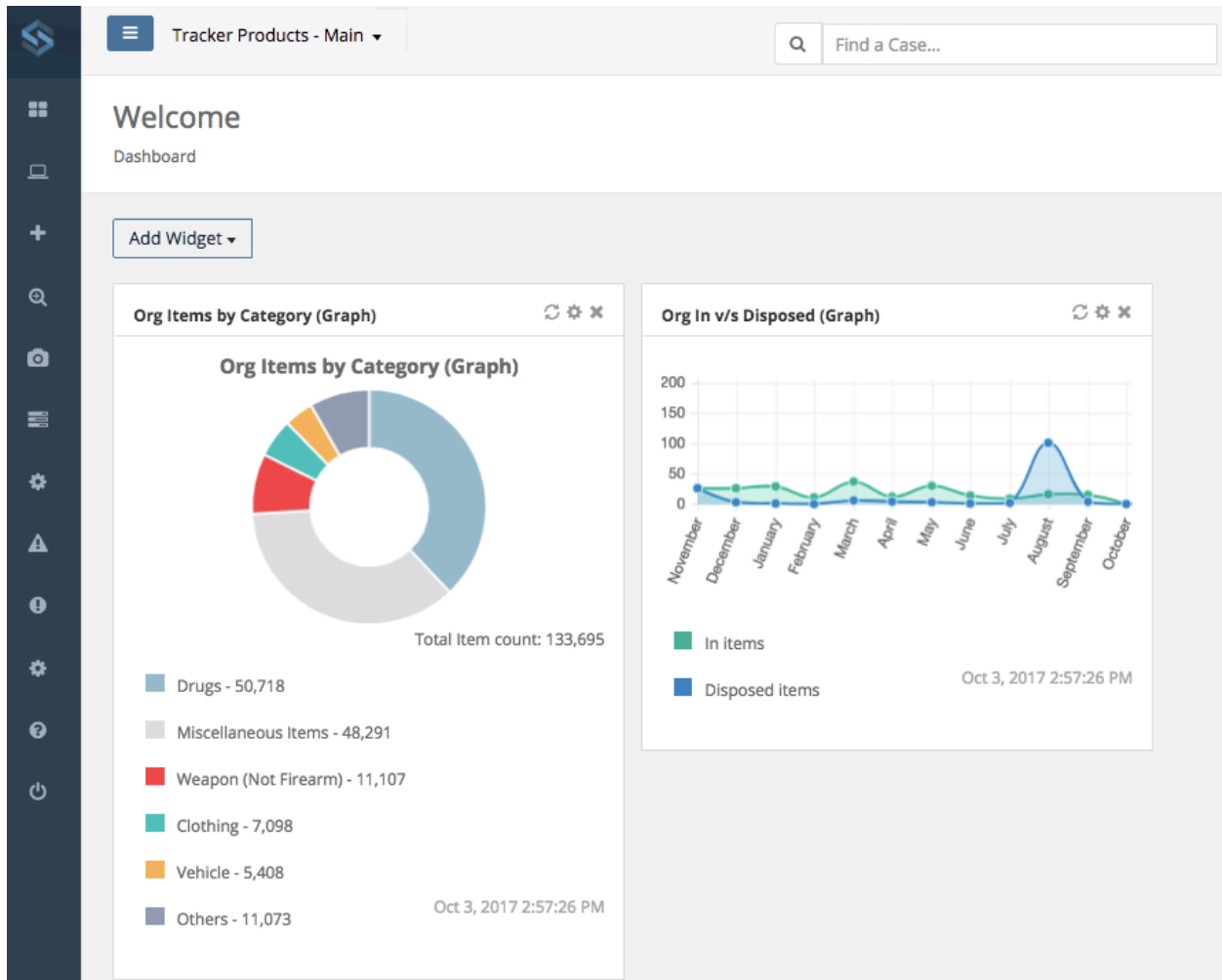
Cancel

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>

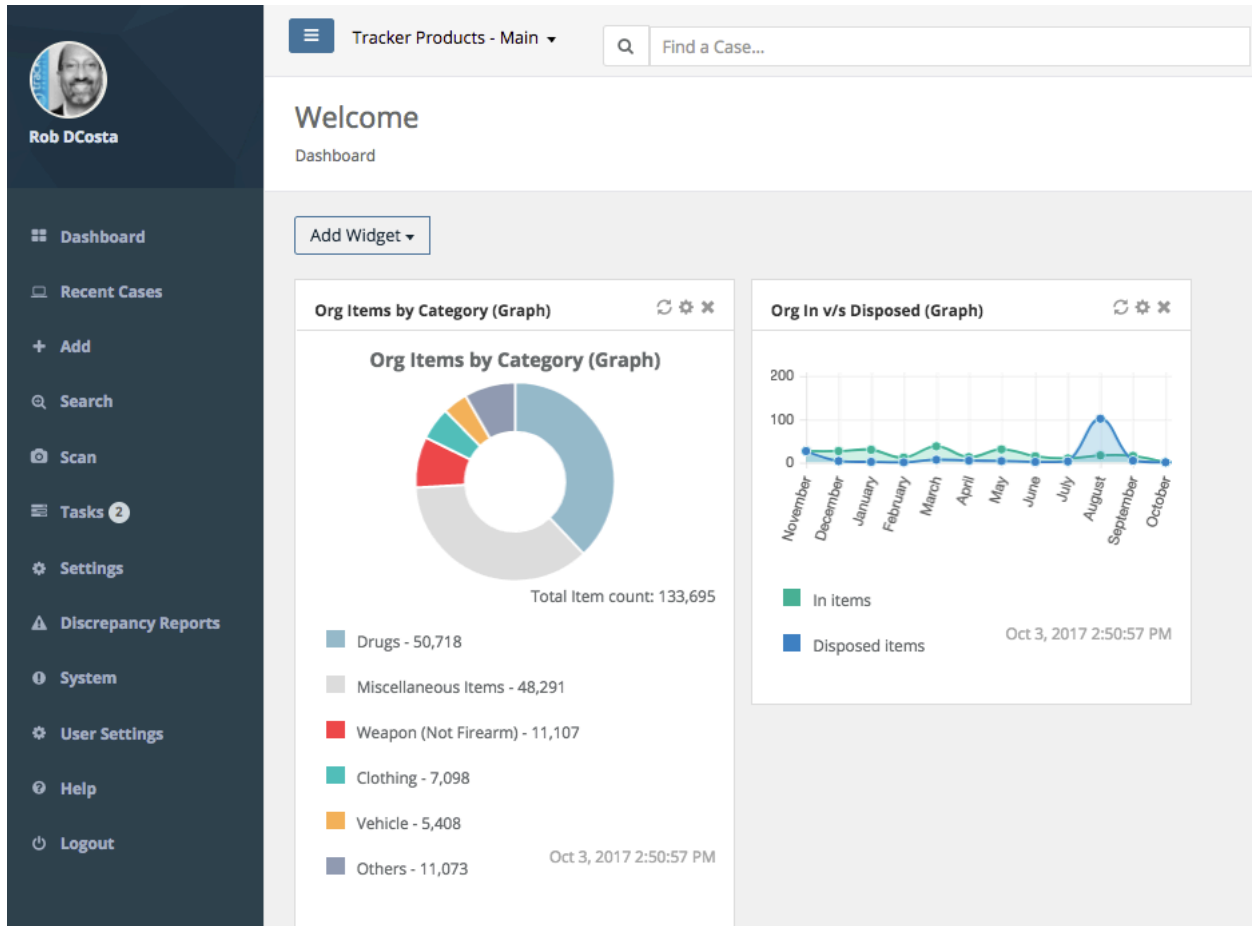
Collapsing the Quick Menu

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.