Agency Special Admin Training Guide

Version 3.5
January 2022

Table of contents

Welcome to OfficerTRAK®

OfficerTRAK® is a proprietary software system owned and designed by OfficerTRAK®, LLC. We upgrade our system regularly to provide added functionality based on feedback from our users.

We value your feedback and encourage you to provide any recommendations on how we can improve our software. We will communicate new functionality and provide updated training guides to reflect those changes.

We encourage you to use the Google Chrome browser for the best results.

Getting Started

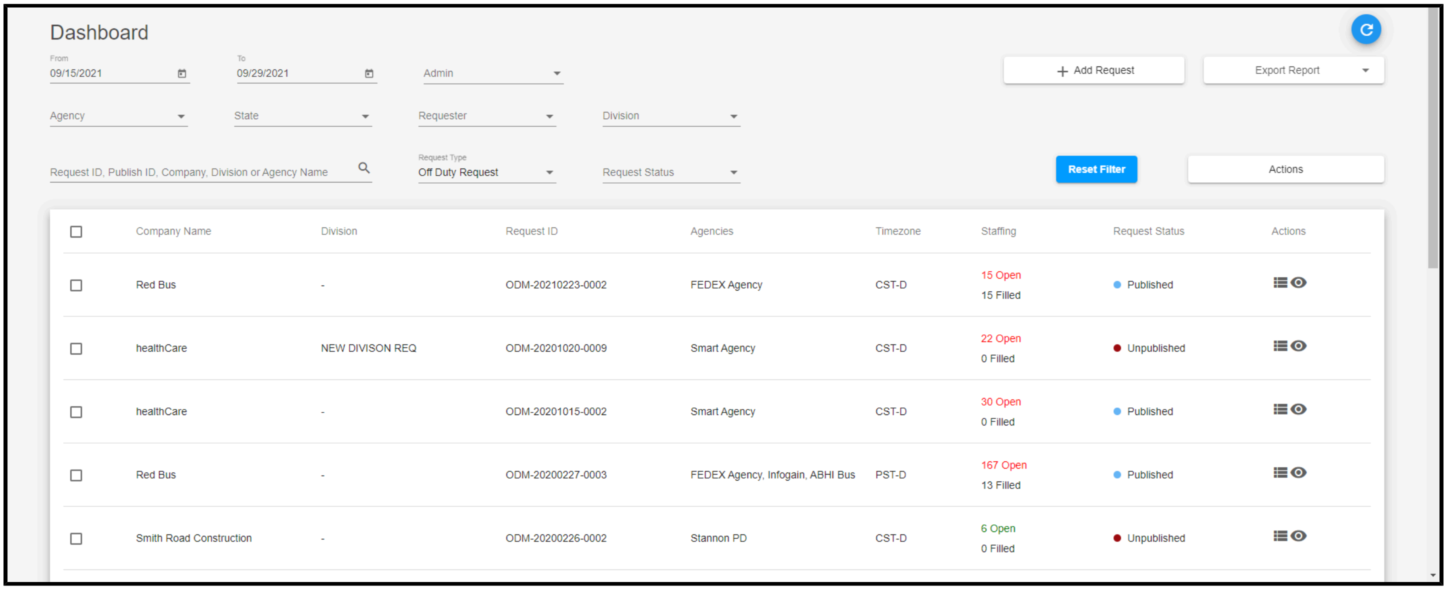
Log into the OfficerTRAK® system using your email and password.
Forgot Password - If you forget your password, click on the "Forgot password?" link below the Sign-in section. OfficerTRAK® will email you a link to create a new password.

Once you have logged in, you will be directed to the DASHBOARD page. This page provides you detailed information on all the requests in the system for your agency. The following pages are also available on top of the page:

- DISPATCH- Information provided at the shift level for easier management of upcoming shifts, sorted by shift rather than the full request. It also allows for greater flexibility in publishing specific shifts.
- OFFICERS – Information on specific officers and the ability to run several reports on officer status and activity.
- OFFICERS GROUP – Ability to create groups if you want to publish requests to certain populations of officers.
- REQUESTORS – Create customers to define different types of internal request types
- NOTIFICATION – Sent Shift or Broadcast Notifications to Officer's Mobile App.

Dashboard

Basic information about each request is shown on the dashboard.



Filters

You can utilize the filters to condense the information you want to view. The filters provide search and multiple select options. Once you have entered the information in the filters you would like to see, click on the Apply Filter button for that filter to see the results.

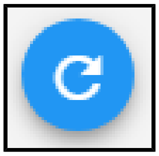
- From / To Date Range — this will show requests in which shifts appear for that date range. All other filters will only show the values for that date range.
- Requester – This is the company name, in the event an individual is requesting service their name will be the company name.
- Division- This is a referenced category set by the requester.
- Created By - Allows Agency Admins the ability to view and filter ODM vs. Agency managed requests.
- Request Status* – Five different statuses- Approved, Canceled, Published, Rejected, Unpublished.
- Search Request – This allows you to search for other values on the dashboard.

*You must manually select Rejected and Canceled status' to see them on the Dashboard.

Refreshes & Sorts

REFRESHES

- Clears all filters on page


- Allows filters and filtered information to remain in place, updates data on page

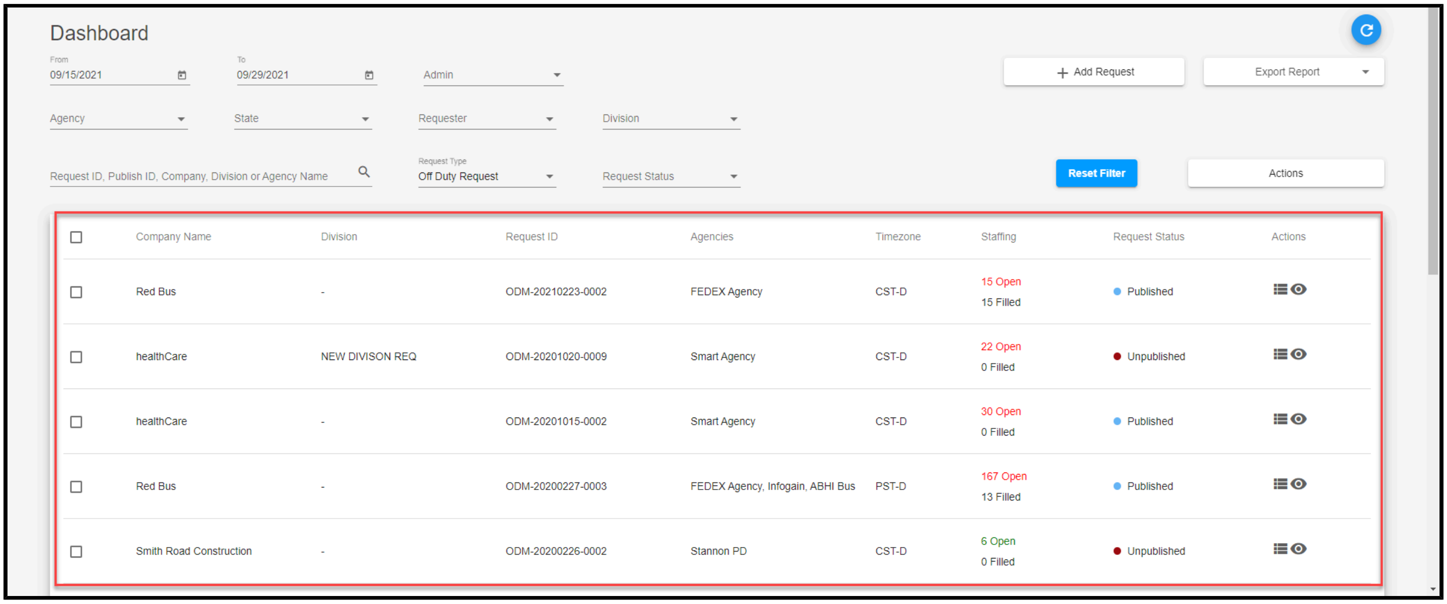
SORTS

Click on the header name to sort up or down for the following:

- Company Name
- Request ID

Main Request Information

The Information below is a break down of the different columns that are visible on the Dashboard.



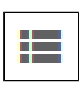
Company Name - Requesters Name or Company Name
Division – allows for multiple locations, types, etc. per company
Request ID - Unique Request ID (YYYYMMDD-daily sequence)
Created By - Who Created Request (Admin, Requester)
Agencies - Agency Assigned

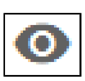
Staffing – Open / Filled shifts status based on date range

GREEN - No Open Jobs <7 days from the filter start date
ORANGE - No Open Jobs <48 hours, Open Jobs>= 48 hours, <7 days from the filter start date
RED - Open Shifts < 48 hours from filter start date

Request Status (Waiting for Approval, Approved, Rejected*, Canceled*, Published, Unpublished)

·Only show when selected in the filter

Actions -  - Expands View of request details

 - Publish history for request

Actions - Request Statuses

Take action on a request(s) by selecting the box to the left of the request and click on the action you would like to take on the request(s). You can select the same action for more than one request as long as they are in the same status.

APPROVE -Approve a request. Once in an Approved state, the Publish option will be active.

PUBLISH – Initiates the Publish Engine to determine how you would like to send a request(s) to your officers to select shifts from the request(s).

RE-APPROVE – Approve a request that has been Canceled or Rejected.

REJECT – Reject a request. You can reject a request instead of approving it.

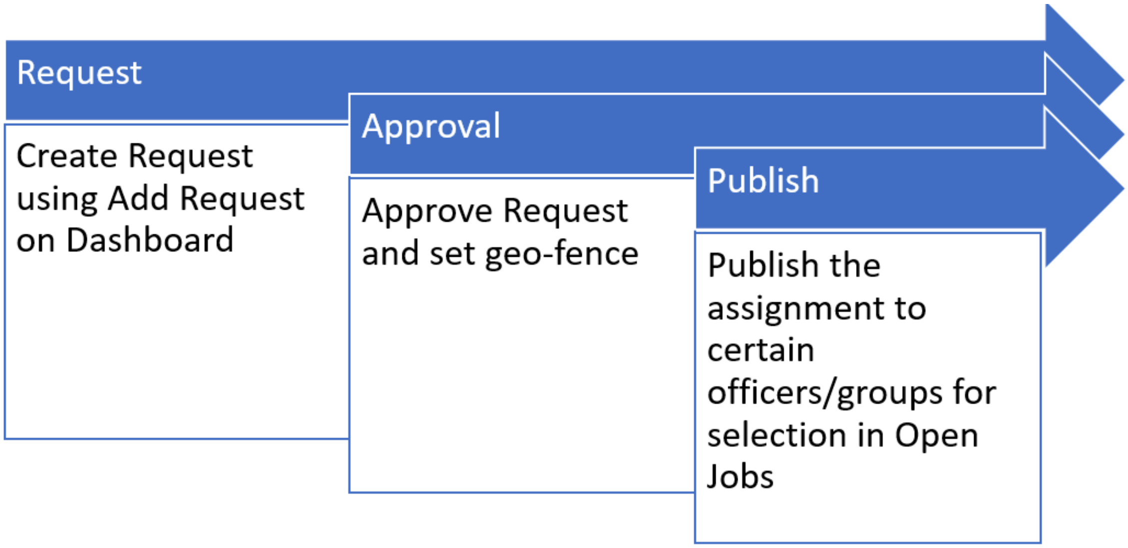
CANCEL – Cancel an Approved or Unpublished request. Requires reason for cancellation to be entered.

These are the types of actions and what statuses they need to be in to take certain actions.

Action Buttons						
Current Status	Publish	Unpublish	Approve	Reject	Re-Approve	Cancel
Published	Y	Y	N	N	N	N
Unpublished	Y	N	N	N	N	Y
Waiting for Approval	N	N	Y	Y	N	N
Rejected	N	N	N	N	Y	N
Canceled	N	N	N	N	Y	N
Approved	Y	N	N	N	N	Y

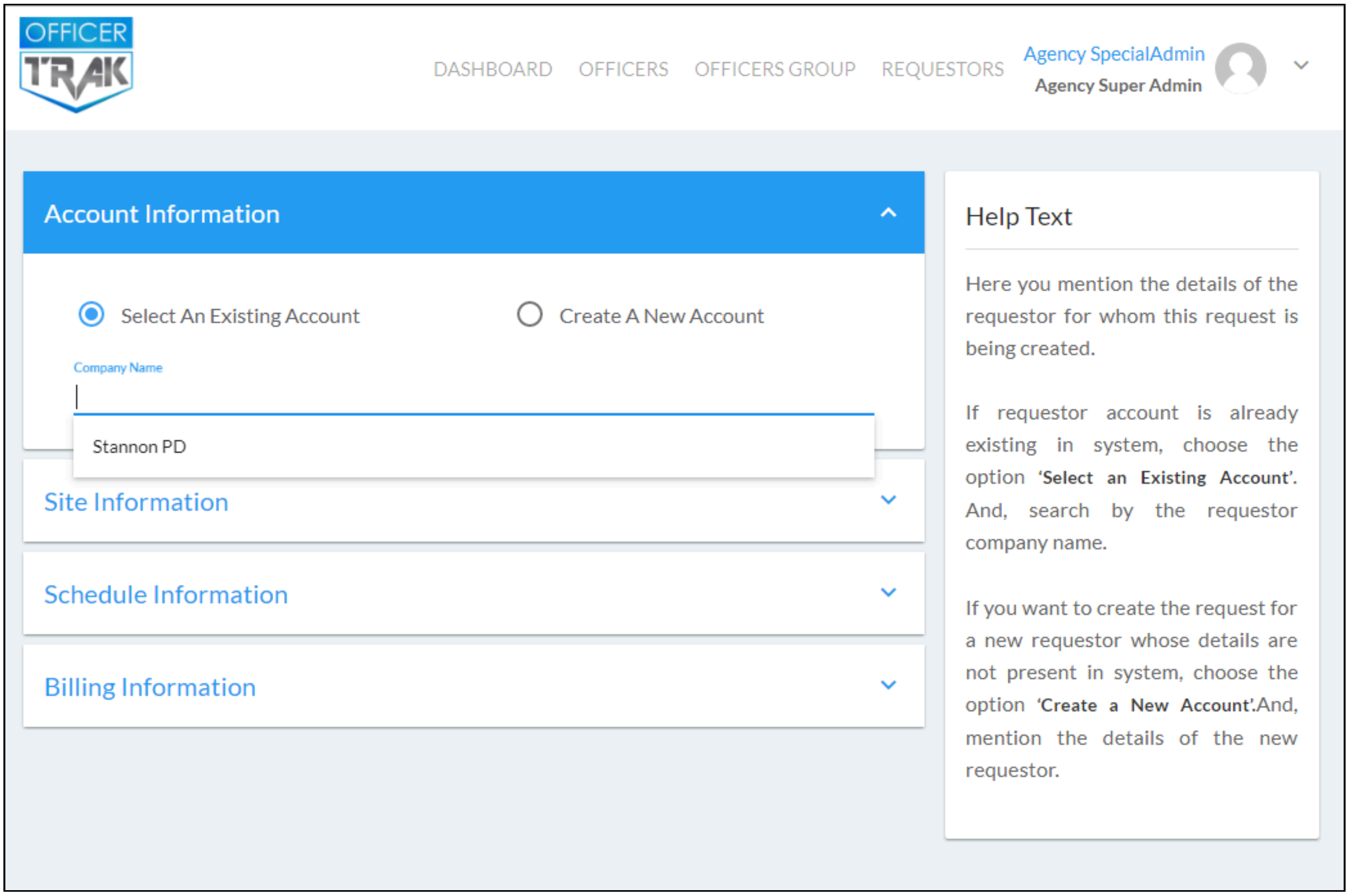
Creating a Request

Below is the process for creating and publishing a request.



- Use this to create a new customer request or create a request for an existing customer.

Requesters & Divisions



You have two options when creating a request, **Select an Existing Account,** or **Create a New Account**.

When creating Requesters (customers), consider how you want to use them for requests for agency use. You can use one Requester for all requests (perhaps agency name for the Company Name) and utilize the Description field in the request to better outline the specific requests. In the event you have more specific, consistent types of work you could create individual Requesters for each type, using the Company Name to define the type (IE. 3rd Shift, Thanksgiving Day Parade, etc.). Remember the officers will know it's an agency request by the name AGENCY showing up on the app next to those requests.

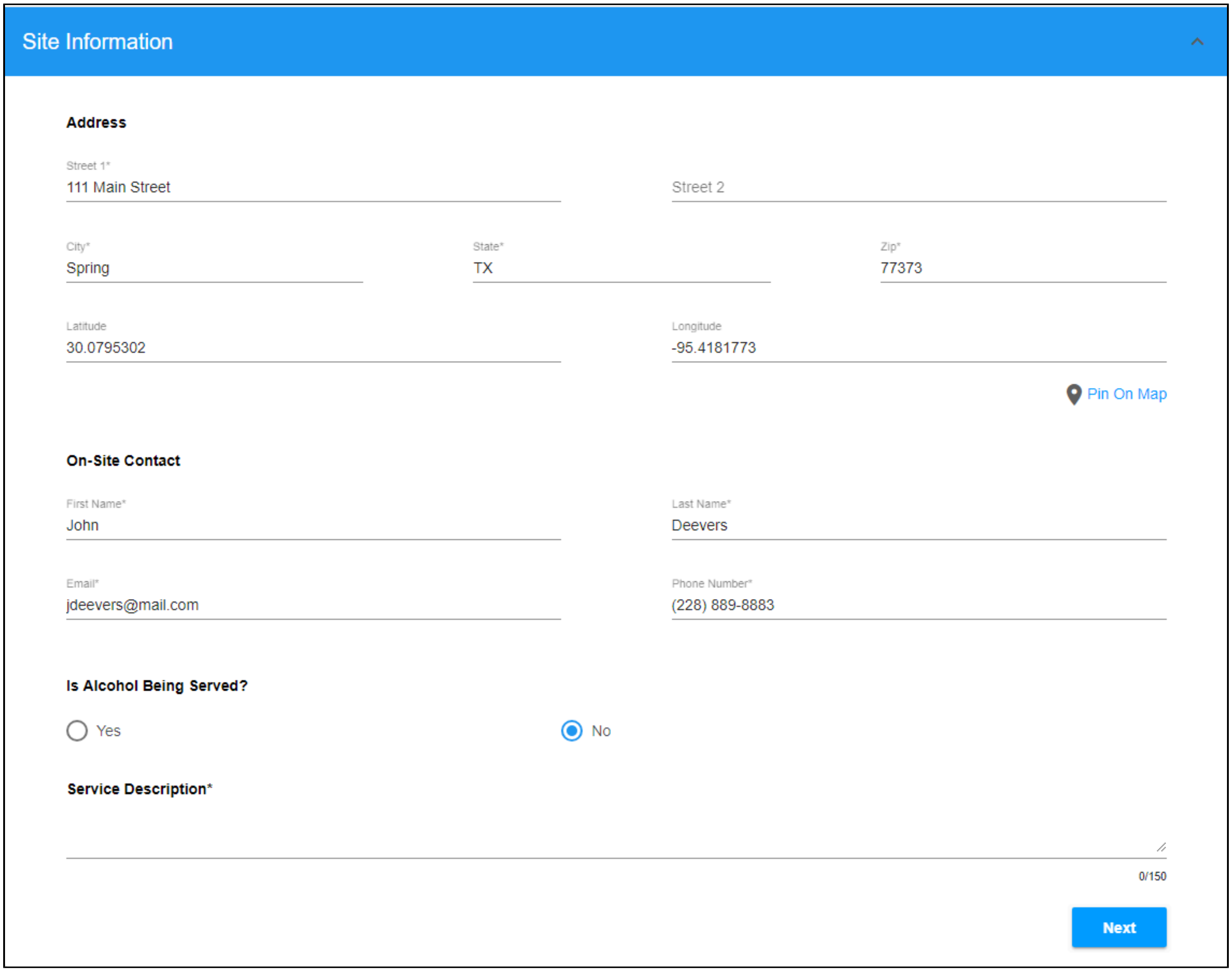
Select an Existing Account – This allows you to utilize an existing account to create a request. Each section except for the Schedule Information will pre-populate with information from the last request. You can modify all this information for an existing Requester per request.

Create a New Account – Starts you from the beginning; the Company Name and email address must be unique for each Requester. Since these won't be accessed by a customer, you can create false emails for each requester (recommend using @mail.com at the end of the email to avoid potentially using a real email account).

DIVISION

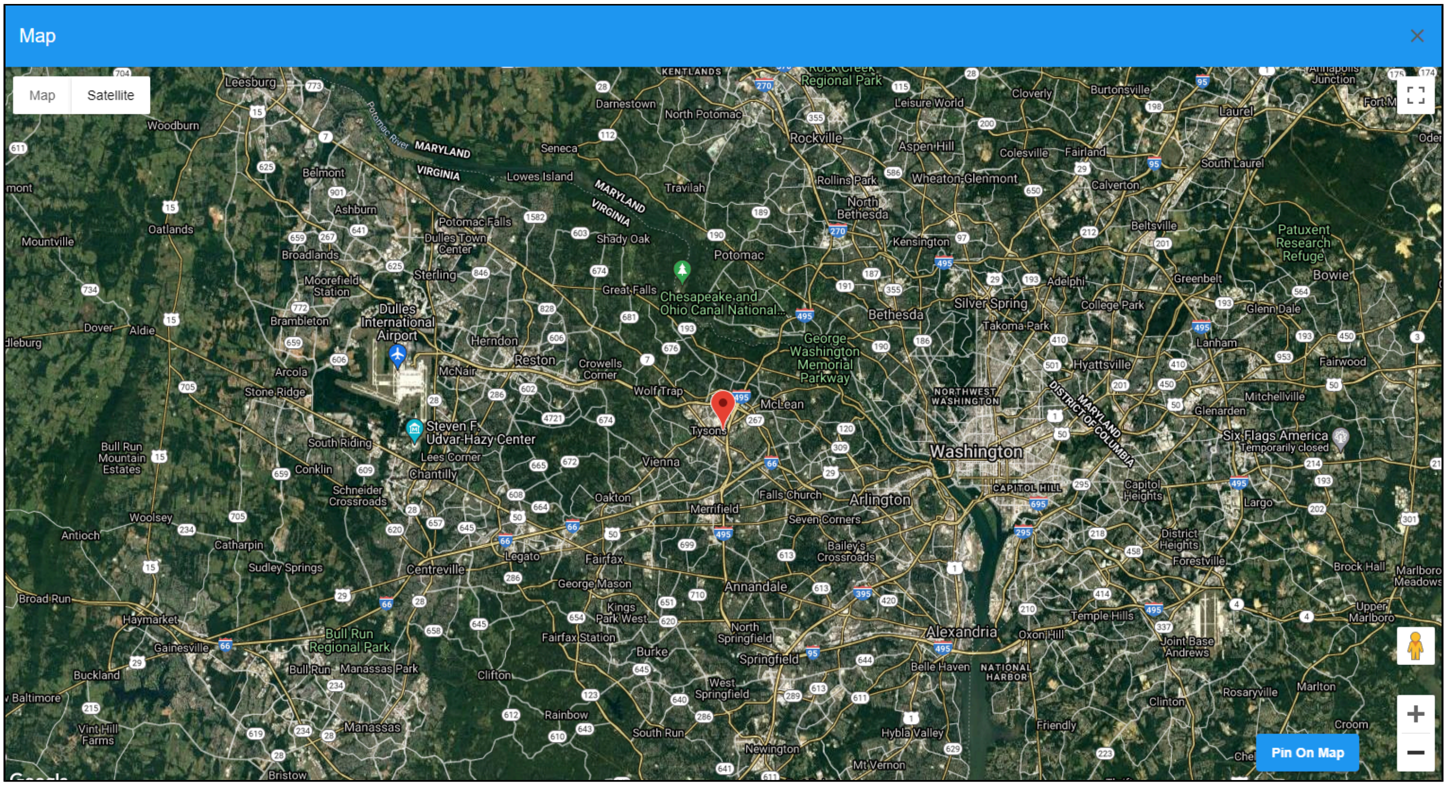
Allows multiple different sub-companies, locations, stores, or descriptors to be created under one company name. An example is an agency may want to create one company for their agency and add Divisions for events, shifts, etc. (4th July Parade, 3rd Shift, DUI Task Force). Each division is saved as added and can have unique locations and billing information for future use. The Division is visible through OfficerTRAK® for reference.

Site Information



Utilize the Address Search Bar to pull up Google Maps addresses. Once you select an address it will populate the rest of the address fields including latitude and longitude. If you manually enter the address it will not modify the latitude and longitude fields. **These coordinates are used for location directions for the officers on the App as well as Geo-Fence location.**

Pin On Map



You can use the Pin On Map to provide an exact location for a request if not available through the Google Maps search. Click on Pin On Map, use the + and – to zoom in / out. Move the red marker  to the location you want and click the check mark at the bottom right  to accept. It will take you back to the Site Information page, update the coordinates and override the physical address with Pin on Map. The address on the App will then be replaced with "Click here for work location".

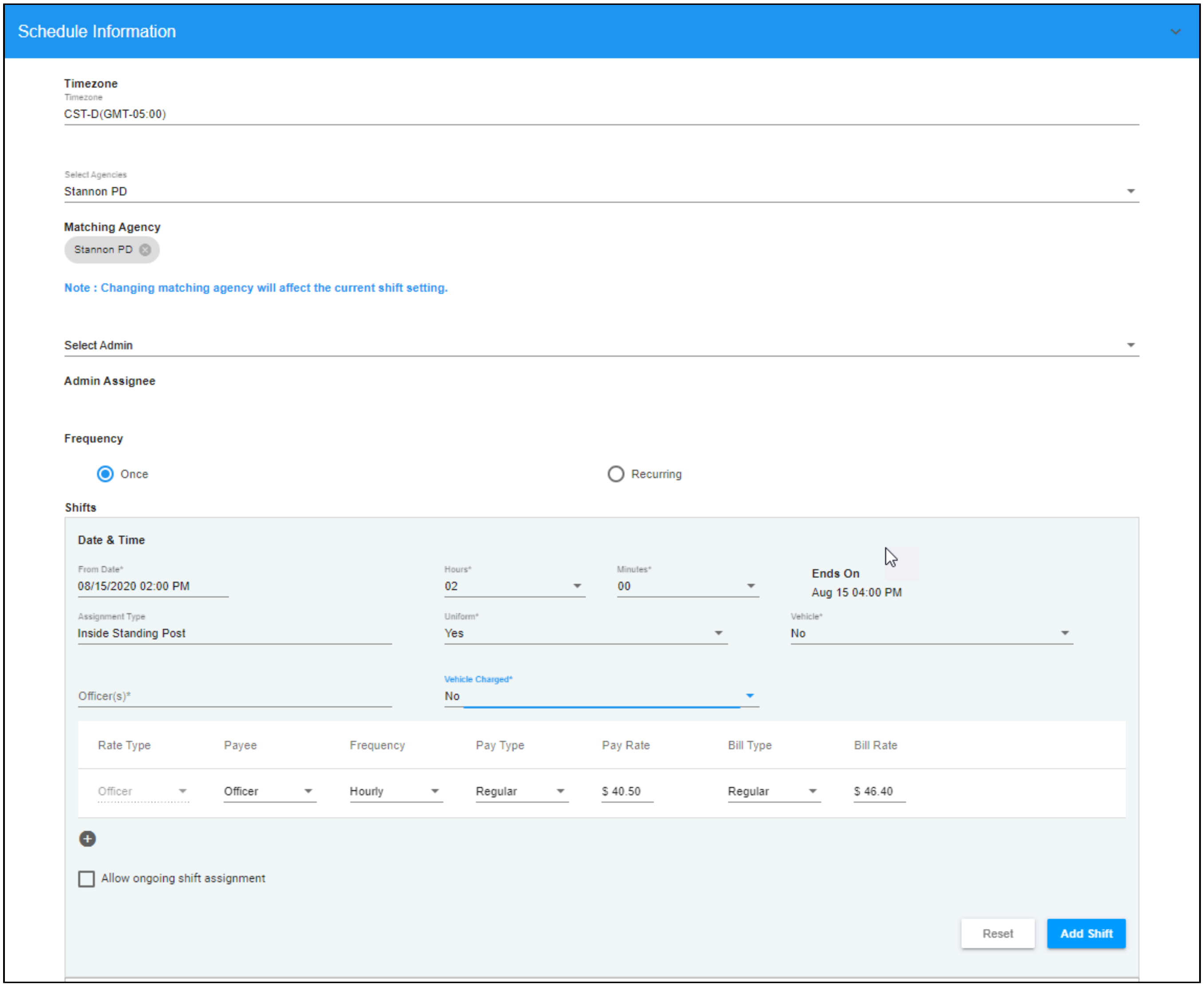
On-Site Contact

This information will show on the App for the officers to contact someone regarding the request.

Service Description

Provide a brief description of the request, up to 150 characters. This will be visible to officers on the App and will show in the Officer Hour's export on the Officers page.

Schedule Information



This schedule builder allows you to create a simple, one-time request to an extremely complex request that goes on for an extended period.

Time Zone

The time zone will default to the latitude and longitude used for site location. You can edit this in the request flow and job details once the request has been submitted.

Matching Agency

If a Requester accesses an agency URL and / or the worksite location is within the jurisdiction map, agency(s) will be assigned. Defaults at the agency level will pre-populate fields, defaults, and assignment types.

Admin Assignee

Admins can be assigned to requests, this filter allows users to filter using My View and / or other admins on Dashboard and Dispatch pages.

Frequency

If your request is for one day (Ex. 7 AM to 2 PM on Sep. 25, 2019), simply click on **“Once”**.

If you have a request that extends beyond one day, or with multiple shifts, staggered shifts, different request types or occur on different days of the week please click on **“Recurring”**.

Please remember you are building shifts. If you want 24/7 coverage for one week and want three shifts per day you would create three separate shifts and adjust the start and end times of each as you would like the officers to start and finish. The schedule builder will compile all those shifts together to create 24/7 coverage with your requested start and end times per shift.

Shifts

To create a one-time shift please follow the below steps:

1. Select your start date and time
2. Select the number of hours and minutes for that shift (15-minute increments)
3. Select the Request Type, Uniform, Vehicle, and Number of Officers
4. Click on the “Add Shift” button
5. Your created shift will appear below

To create a recurring shift, please follow the steps below:

1. Define the First Occurrence

Here you fill in the details for **only the first shift.**

• Select your start date and time
• Select the number of hours and minutes for that shift (15-minute increments)
• Select the Request Type, Uniform, Vehicle, and Number of Officers

2. Define Recurrence Basis

• **Daily –** Shifts will be created daily until the end date in the **Define Recurrence Duration** section.

• **Weekly –** Shifts will be created based on the days you select per week until the end date in the **Define Recurrence Duration** section.

• **Weekly - Interval –** select the interval of weeks from 1 to 4. If you want the shifts to be created for every other week you will select 2.

• **Monthly –** Shifts will be created on a certain day of the week or date of the month per month until the end date in the **Define Recurrence Duration** section.

3. Define Recurrence Duration

The **From Date** will be automatically populated based on the original start date. You will select when the last **Start Date** of that shift should occur.

4. Allow Ongoing Shift Assignment

Check this box to allow the shift to show in the Open Jobs tab in the OfficerTRAK® mobile app up to the specified time frame entered. This allows officers to select shifts after they have started, up to the amount of time allotted to select the shift.

Rate Information

Rates for the shifts will be built based on the agency defaults or overall defaults (vehicle, vehicle charged, etc.) You can manually add additional rows for the shift for additional rates.

Rate Type	Payee	Frequency	Pay Type	Pay Rate	Bill Type	Bill Rate
Officer	Officer	Hourly	Regular	$ 40.50	Regular	$ 46.40
Admin	Agency	Hourly	Regular	$ 10	Regular	$ 20

Once completed, click on the Add Shift button and the shift will be built below.

You can edit / copy or delete created shift by clicking on the appropriate icon

• **Edit Shift-**click on the pencil icon**,** the original information will populate in the **Schedule Information** section above. Make changes there and click on **Update Shift** to save the changes

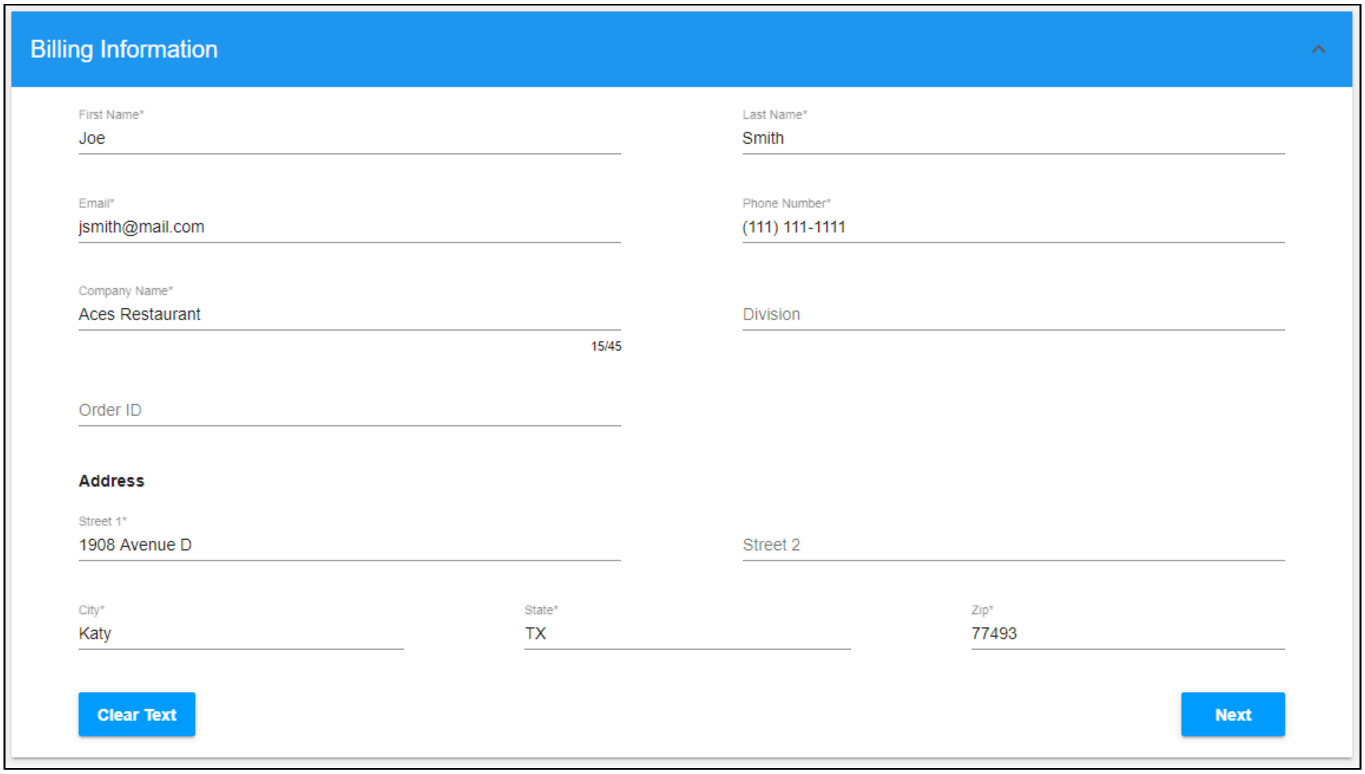
• **Copy Shift-**click on the square icon, the original information will populate in the **Schedule Information** section above. Make changes there and click on **Add Shift** to make a revised copy of the original shift

• **Delete Shift-**click on the garbage can icon, it will ask to confirm you want to cancel that shift

Useful Tip: Use the Copy feature if only a few fields change.

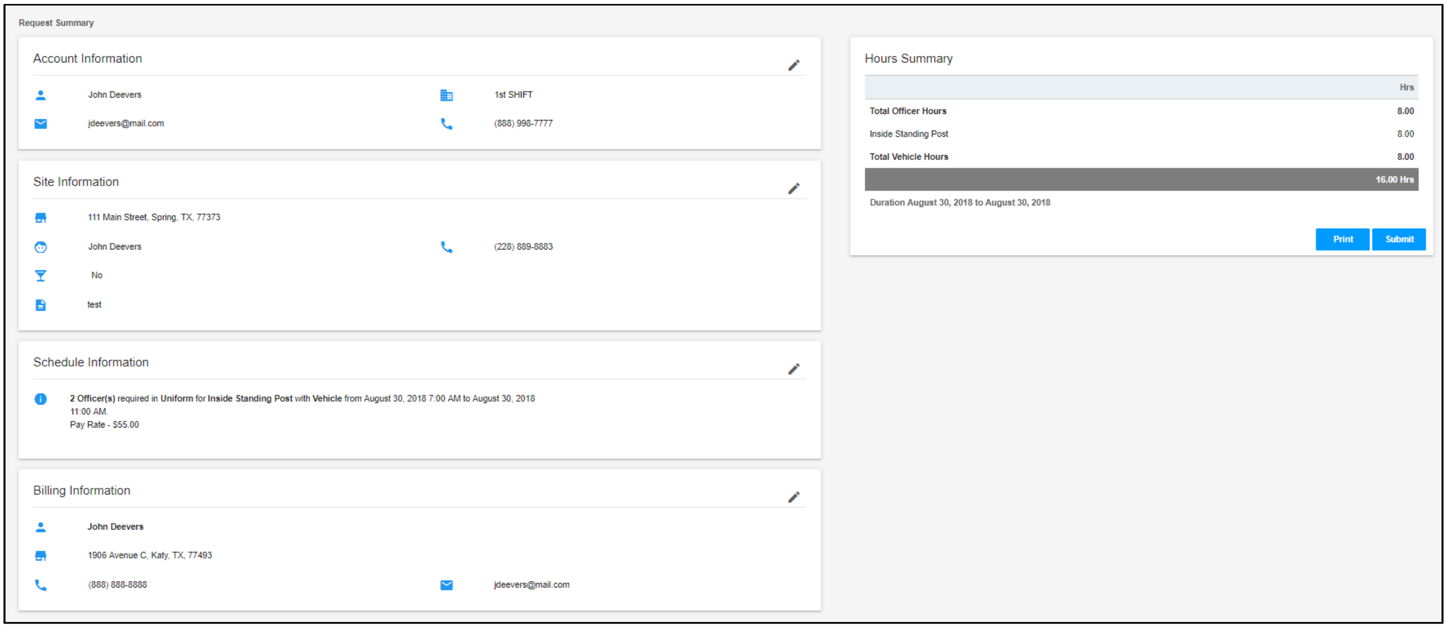
You will have a chance to review your schedule and make changes on the confirmation page.

Billing Information



Place billing information here for the request.
If Billing Info is not required, you can clear the data and edit under Request Info once the request has been created.

Confirmation Page



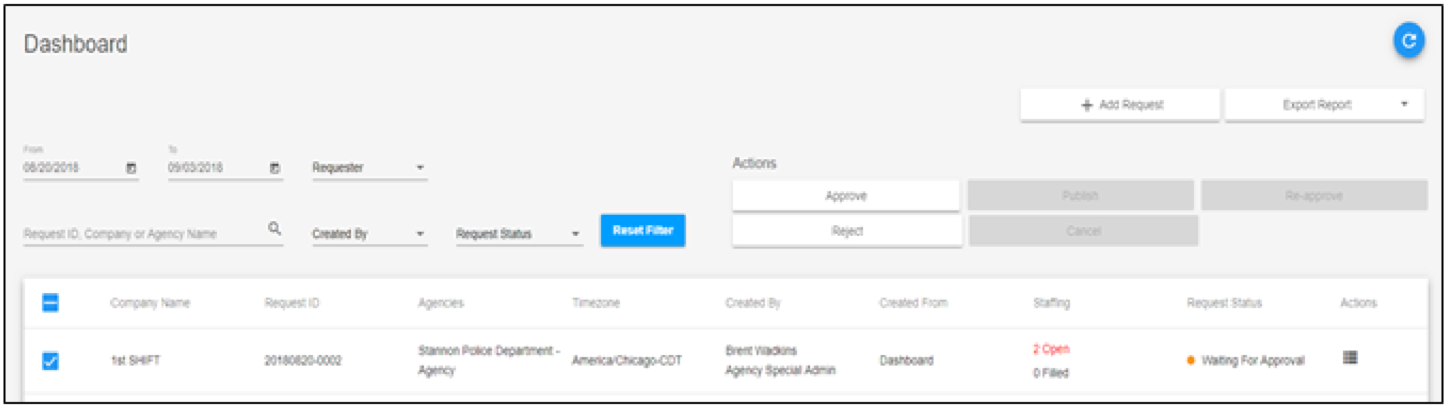
You can review your request prior to submitting it for review. Use the edit pencils to edit any sections of the request.

The Hours Summary section will outline the total hours for each type of request including vehicle hours. If the request lasts for longer than one month it will total one month's hours and reflect those in the section above the Submit button.

You can print the summary page to a printer or PDF.
Once everything looks correct, you can submit the request where it will go to "Waiting for Approval" on the Dashboard. Don't worry if you made a mistake, you can always change it on the Dashboard.

Approving the Request

Once a request has been created it will appear on the dashboard in a “Waiting for Approval” status.



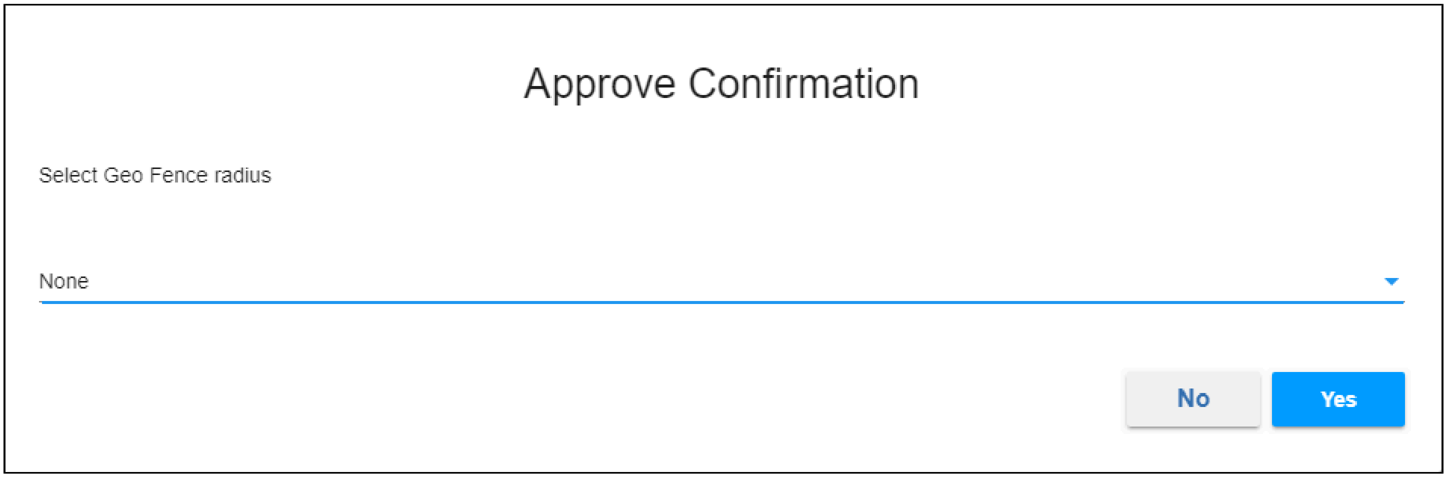
Check the Box for this request and select Approve or Reject under the Actions Drop down button.

*Remember that by Approving the request it will not be published out to the officers yet, this will happen when you use the Publish feature.

You can modify the request prior to or after approving the request.

After clicking on the Approval button, you will be asked to select a Geo-Fence.

Geo-Fence



Geo-Fences are used to provide officer accountability while clocking in, clocking out, and working the shift. Various radius's can be set which will create a fence of that distance around the work coordinates. While the work coordinates are quite accurate, please consider increasing the radius of the Geo-Fence since factors such as phone type, version, carrier, and settings can cause an officer's location to be slightly off.

No Geo-Fence – does not require the officer to clock in and out within the fence, captures GPS coordinates when they clock in and out, and when they add field notes during their shift.

Geo-Fence – requires GPS to be on and officer to be within the fence to clock in / out. The system will also randomly ping the officer's location during the shift to determine their location. If an officer is outside the fence a system-generated note will appear in shift notes. Attempts to turn off the GPS, or clocking in or out outside the Geo-Fence will also be documented in the shift notes.

Geo-Fence type can be modified after approval in the Job Details section of the request.

Cancel a Request

Once a request has been approved it can be canceled at any time.

If a request is in the published state, it must be Unpublished before you can cancel it.

Simply select the request you would like to cancel, click on the Cancel button in the Actions section, enter a reason and click Yes. You will need to manually remove any assigned officers prior to canceling the request. You can always re-approve the request once canceled.

To view Canceled requests, you will need to select the Job Status Type filter of Canceled to see it on the Dashboard.

Assign Officers

Manually assign officers to shifts using the officer icon on the Shifts tab.
For recurring shifts, you can assign an officer to certain shifts. You will be prompted whether you want to assign an officer to one shift or recurring.
If you select recurring, the system will provide the recurring days available and you can select those days.
IMPORTANT – Since the assigned shifts require a Publish ID to appear in my jobs, you will need to publish the assigned shift(s) to the respective officers for them to receive the notification and see the shift(s) in My Jobs.

Allowing Officers to Drop Jobs

You can toggle on the ability for officers to drop jobs in the mobile app after they have selected shifts to work. This feature is available in case a work schedule change or personal emergency prevents an officer from working the previously chosen shift.

You may specify the time frame in which an officer may **not** drop a job from the app, prior to the work shift start. For example, You may set the window to 24hrs before the shift starts so that instead of dropping the job, pressing the drop job button will generate a pop up to call the account coordinator, so that your ODM representative may attempt to arrange last-minute coverage or notify the customer of the change.

The Job Drop function is available for Off Duty and Agency Shifts.

		Days*	Hours*	Minutes*
☑ Allow Job Drop Off Duty Job	Time prior to shift start	07	00	00
☑ Allow Job Drop Agency Job	Time prior to shift start	04	00	00

Publish Engine

The OfficerTRAK® Publish Engine allows administrators to provide officers with multiple different ways to select open requests and shifts.
You will want to begin by making sure you have any specific groups of officers created and ready in the Officer Groups section.
There are two pages on which you can publish requests/shifts – DASHBOARD and DISPATCH

DASHBOARD – Basic-publishes out all shifts associated with the selected request(s). Recommended when publishing basic requests with non-repeating, non-permanent shifts.
DISPATCH – Flexible-publishes out specific shifts, allows users to select shifts from various requesters within a date/time range. If you wish to publish shifts for a specific date range (i.e. next week or month), this is the best option. Allows for selection at the shift level for all shifts you want to send out.

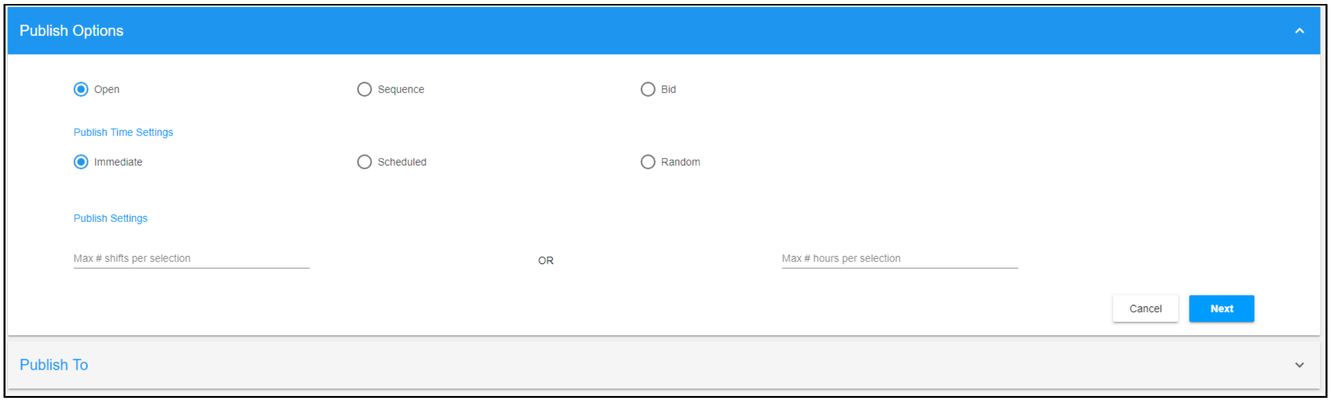
PUBLISHING A REQUEST FROM DASHBOARD
To publish one or more entire requests, select the requests on the Dashboard page, and click PUBLISH in the Actions section. You will now be walked through the Publish Engine to complete your publish. Remember that you will be publishing ALL the shifts for that request. If it's a permanent request all shifts up to 120 days out will be published out.

****IMPORTANT** We recommend you do not publish recurring shifts from the Dashboard, especially those with shifts marked as "Until canceled". The system will publish out all existing and future shifts when they are created 120 days +. In addition, any new shifts created for the request will automatically publish out. Publishing from Dispatch gives ultimate control and flexibility.**

PUBLISHING SHIFTS FROM DISPATCH
If you want to publish certain shifts from a request or multiple shifts from different requests (i.e. all shifts for next week, all shifts on Thursday, etc.) select the shifts from the DISPATCH page and click PUBLISH. IF YOU HAVE PERMANENT, REPEATING SHIFTS ON A REQUEST WE RECOMMEND YOU USE THE DISPATCH PUBLISH OPTION TO SEND OUT ONLY THE SHIFTS YOU WANT FOR UPCOMING WEEKS, MONTHS, ETC.

You will now be walked through the Publish Engine to complete your publish.

SELECTING PUBLISH TYPE
Select from one of three options on how you would like to publish to your officers. If you opted out of bidding for your agency, the bid option will not be available on the web or in mobile apps.
a. Open – Sent to all available officers at the time. First come, first served on selections
b. Sequence – Using hierarchy, ability to send to officers in a specific order. This can be accomplished at the officer level or with certain populations such as groups of officers.
c. Bid – Using hierarchy, the ability for officers to select and prioritize a list of shifts they would like to work.


Publish Options
Open
Sequence
Bid
Publish Time Settings
Immediate
Scheduled
Random
Publish Settings
Max # shifts per selection
OR
Max # hours per selection
Cancel
Next
Publish To

Open

Open Publish = Sent to all available officers at the time. First come, first served on selections

PUBLISH OPTIONS

<u>Publish Time Settings</u>

- **Immediate** – Sent out to officers once you click the PUBLISH button
- **Scheduled** – Select the Date and Time you would like the shifts to be sent out
- **Random** – This allows you to select a date and time range, the system will randomly release the shifts in between those dates/times.

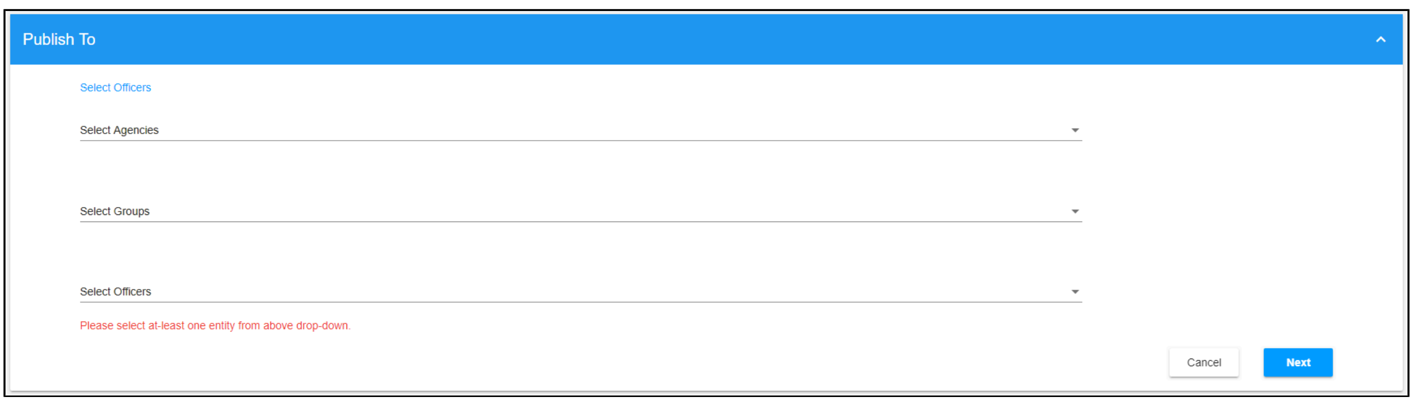
<u>Publish Settings</u>

- **Max # Shifts** – The total number of shifts an officer can select for all the shifts that were published. Leave at 0 if unlimited.
- **Max # Hours** – The total number of hours an officer can select from all the shifts that were published. Leave at 0 if unlimited.

PUBLISH TO

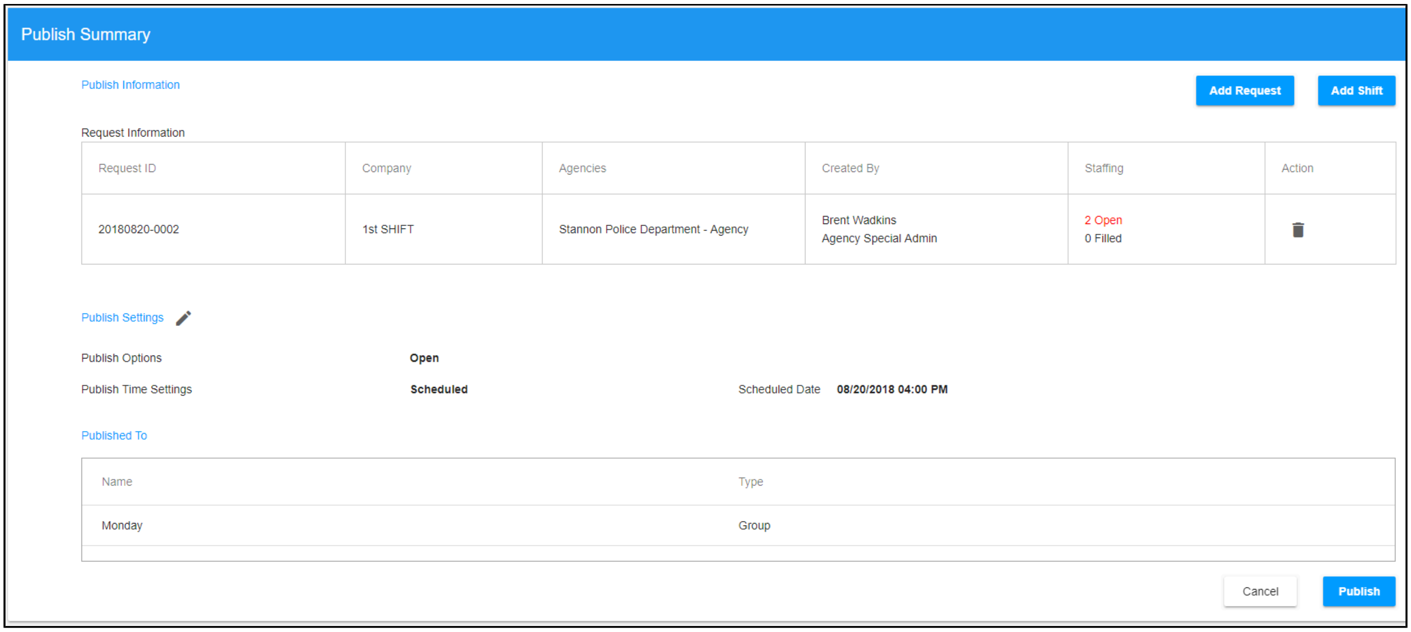
Select the officers to whom you want to publish the shifts/requests. You can add a combination of agencies, groups, and officers.

- **Agency** – Will send out to all eligible officers in the agency
- **Groups** - Will send out to all the eligible officers in the group(s) selected
- **Officers** – Will send out to all officers selected.



PUBLISH SUMMARY

Provides a summary of all your selections for the publish. It allows the ability to review and edit any sections prior to publishing.



- Allows you to select or unselect entire requests from the Dashboard page.

- Allows you to select or unselect specific shifts from the Dispatch page.


- Click here to edit the different sections to make changes.

- Click here to Publish

Sequence

Sequence = Using hierarchy, the ability to send to officers in a specific order. This can be accomplished at the officer level or with certain populations such as groups of officers.

PUBLISH OPTIONS

<u>Publish Time Settings</u>

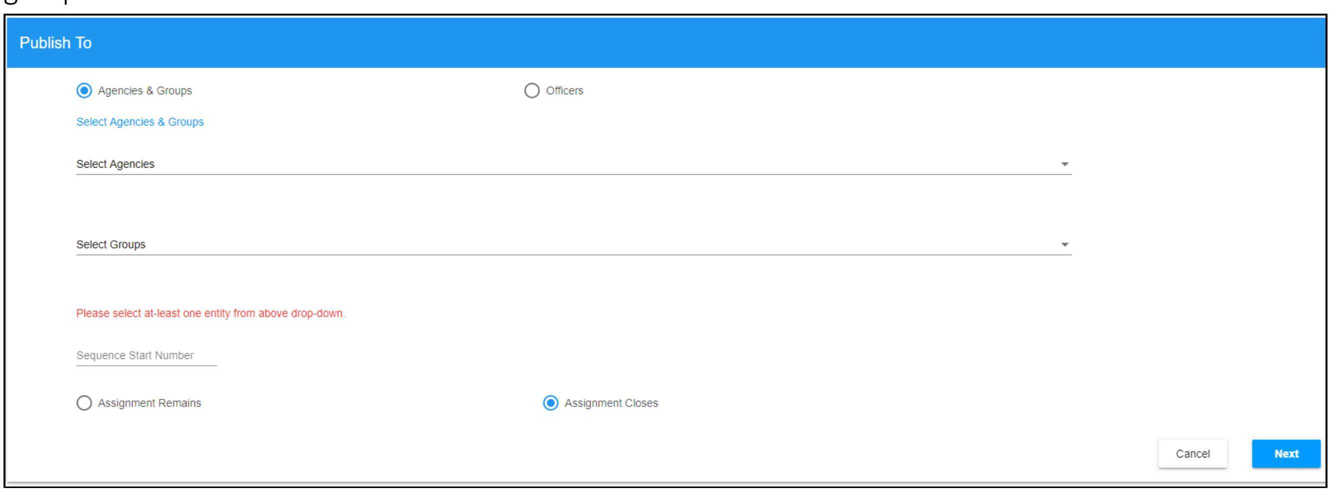
- Immediate – Sent out to officers once you click the PUBLISH button
- Scheduled – Select the Date and Time you would like the shifts to be sent out
- Random – This allows you to select a date and time range, the system will randomly release the shifts in between those dates/times.

<u>Publish Settings</u>

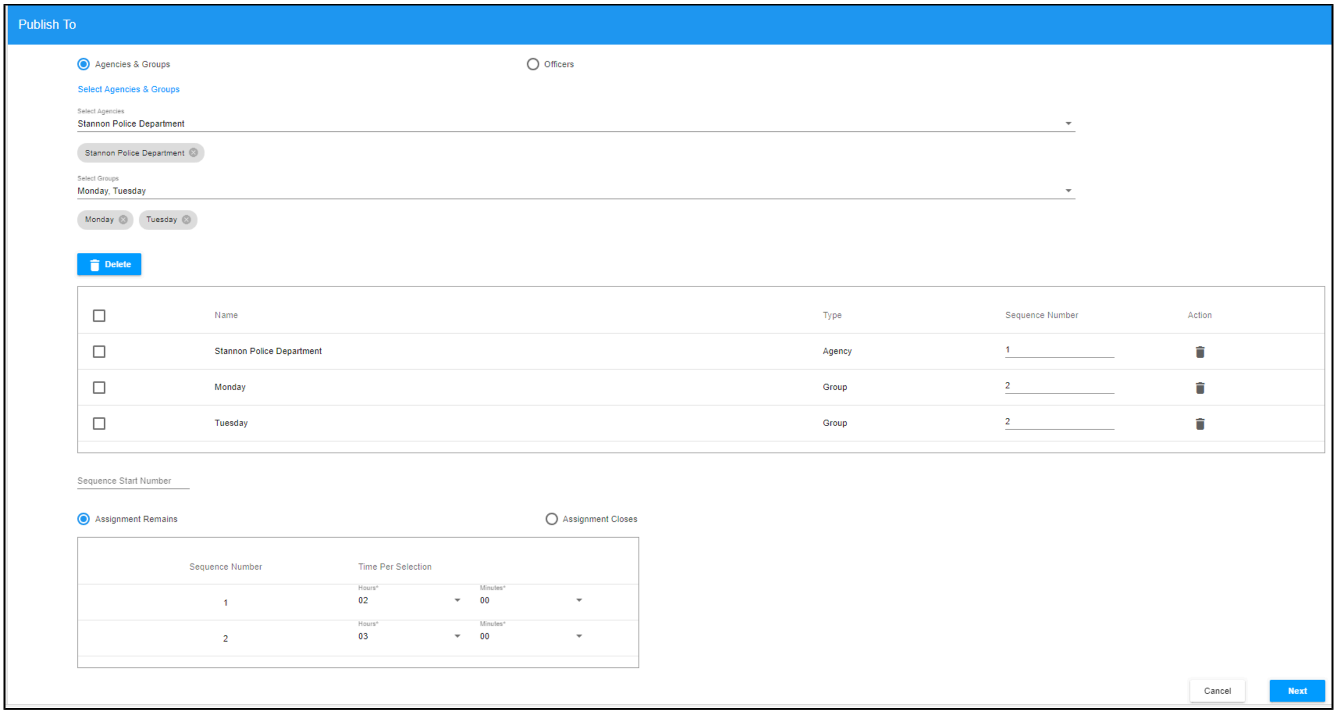
- Max # Shifts – The total number of shifts an officer can select for all the shifts that were published. Leave at 0 if unlimited.
- Max # Hours – The total number of hours an officer can select from all the shifts that were published. Leave at 0 if unlimited.
- Number of Loops – If you want to continue the selection more than one time through the entire sequence list, include the number of times you want the sequence to cycle through, then enter the Max shifts or Max Hours per loop. The Maximum times the loop will run is 20.

PUBLISH TO

Select the officers to whom you want to publish the shifts/requests. You can add a combination of agencies/groups or officers.

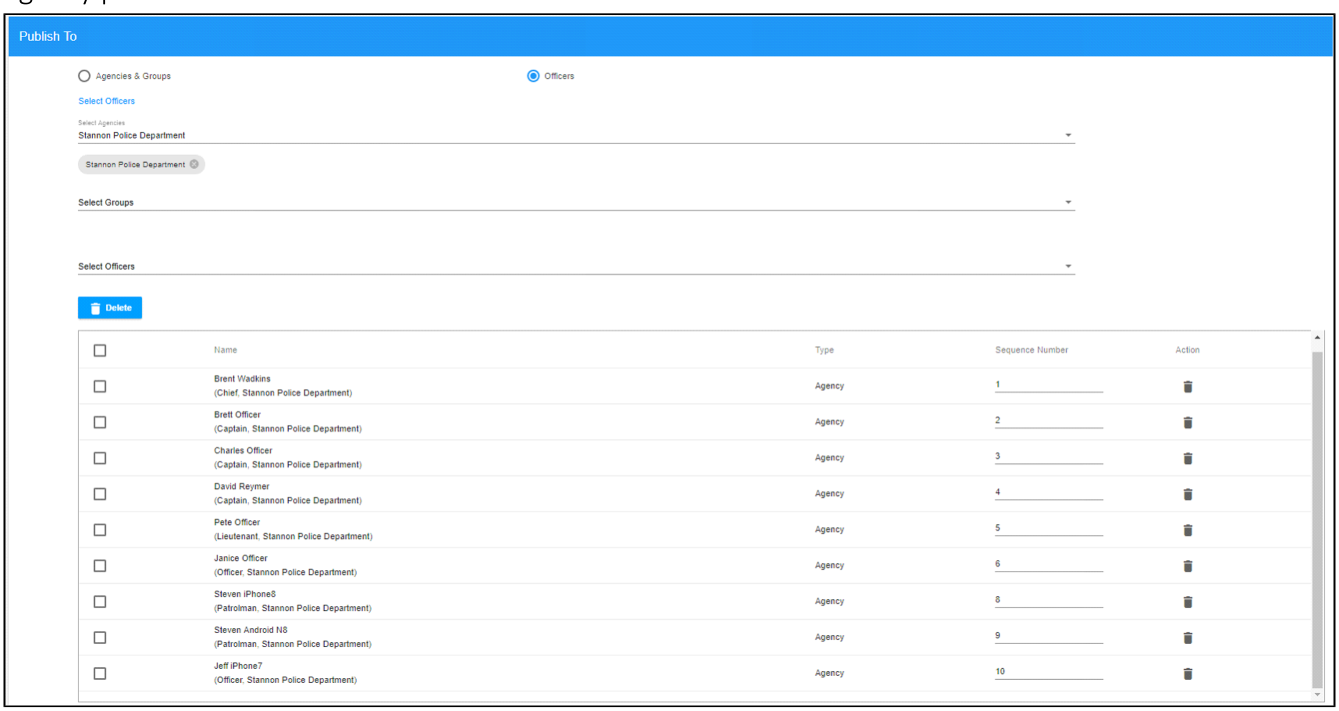


Agencies/Groups – This allows you to send out to different populations for varying amounts of time. Example - You may want one agency of officers to be able to select first for 2 hours, then two groups are able to select for 3 hours.

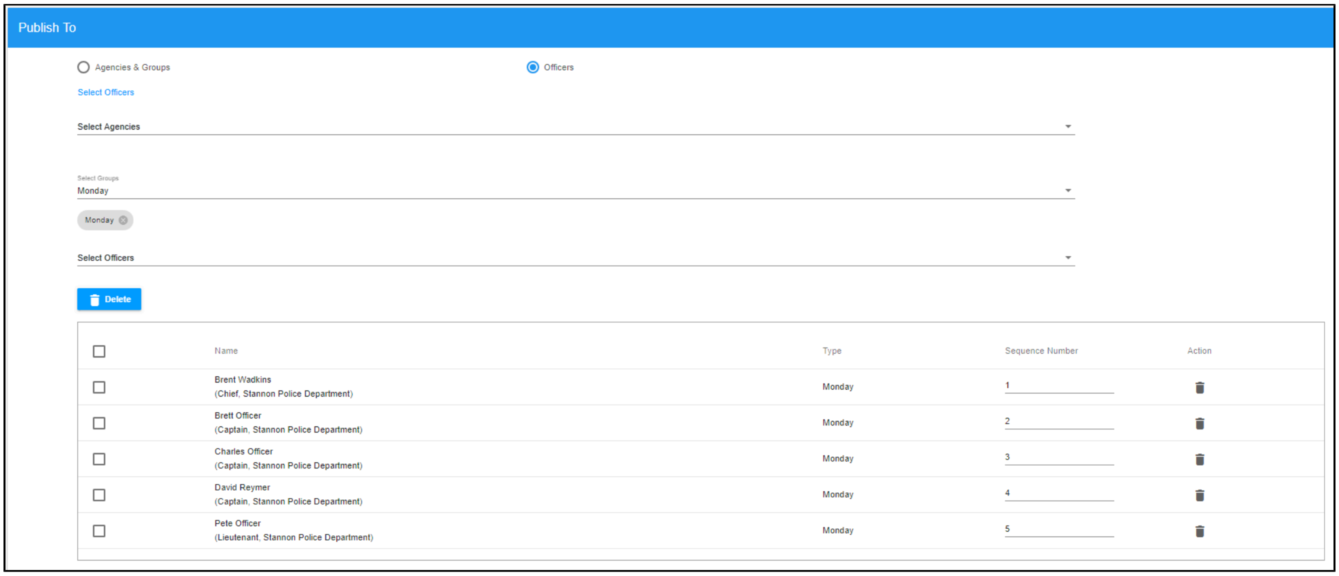


Officers- This allows you to send out specific officers in a certain order.

Agency - If you want to send out only to the agency, you would select an agency and all the officers for that agency would be populated in the list. The sequence number for the officers will be their sequence in the agency profile.



Groups – You can also send it to a certain group(s), the officers in that group will be added to the table below. The sequence number for the officer will be their sequence number in the group(s).



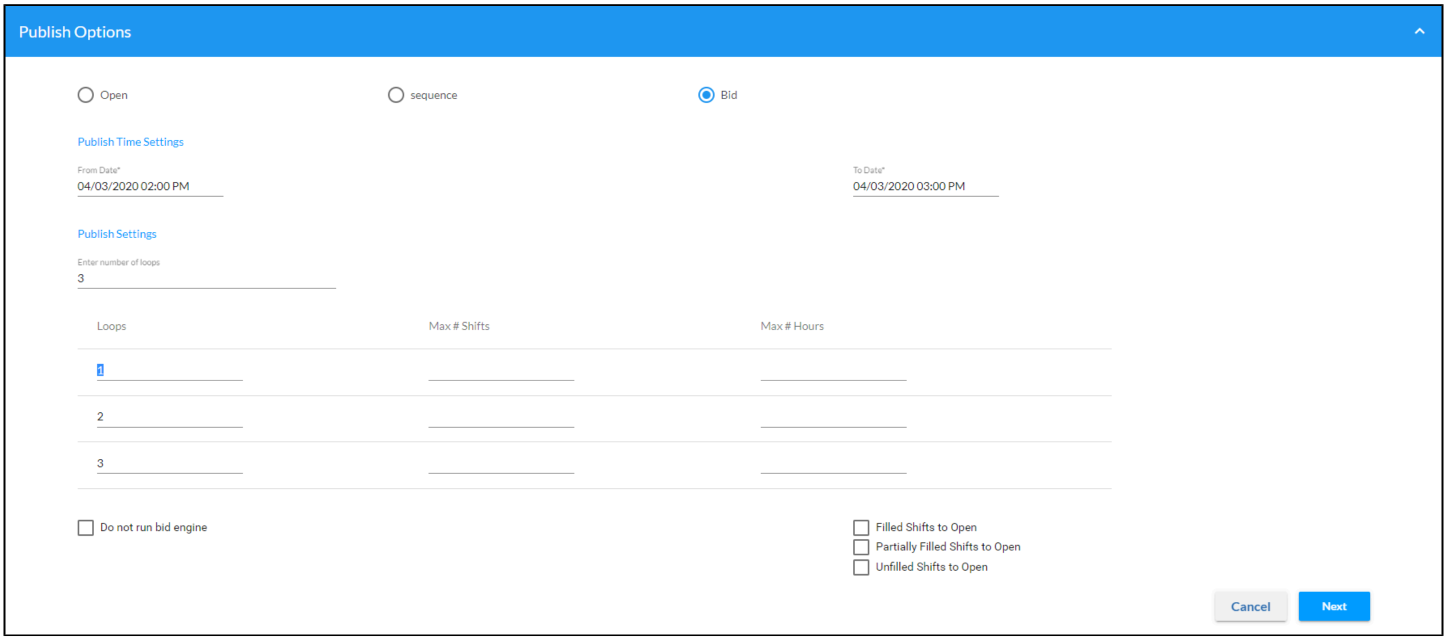
Once you have selected your list of officers you can change their sequence numbers without impacting their original sequence number in their agencies or groups. You can have more than one officer with the same sequence number, those with the same sequence numbers will see the open jobs at the same time.

IMPORTANT – If you select an agency and group(s) or several groups where the officer exists in more than one, the lowest sequence number of all those agencies/groups will be listed in the table.

- Sequence Start Number – This number determines where you want the sequence to start. For example, if you selected 25, it would start with the officer(s) with a sequence of 25, continue to the end of the sequence, continues with 1, and ends with 24 (assuming there are still available shifts).
- Assignment Remains- When an officer reaches the end of the allotted time, the available Open Jobs remain available for the officer to select until the officer reaches maximum selection, or the Open Jobs are all taken.
- Assignment Closes – When an officer reaches the end of the allotted time, the officer is unable to further select any Open Jobs. They are removed from Open Jobs
- Time Per Selection
    a. Agencies/Groups – With each sequence number added in the table, a row will be created which allows you to determine the amount of time you want that sequence to have the shifts available for selection. You can have more than one agency/group with the same sequence number; they will all receive the open jobs at the same time for the same amount of time.
    b. Officers – There is only one time to set which will apply to all sequences for the officers.

Bidding

Bid = Using hierarchy, the ability for officers to select and prioritize a list of shifts they would like to work in their mobile app. The bid time is set, in which officers can select and prioritize an unlimited amount of available jobs. Once the bid time ends, the bid engine runs, automatically assigning shifts to the officers based on sequence and max selections.



PUBLISH OPTIONS

<u>Publish Time Settings</u>

• From Date – The date and time you would like to open the bidding process, allowing officers to select the jobs they would like to work.

• To Date: – The end of the bidding period, when officer's bids are locked in and the Bid Engine runs.

<u>Publish Settings</u>

• Max # Shifts – The total number of shifts an officer can be awarded for the Bid. Leave blank if unlimited.

• Max # Hours – The total number of hours an officer can be awarded for the Bid. Leave blank if unlimited.

• Number of Loops – If you want to continue the assignment process more than one time through the entire sequence list, include the number of times you want the sequence to cycle through, then enter the number of Max Hours or Max Shifts for each loop. The maximum number of times the loops will run is 20.

• Do Not Run Bid Engine – This will simply pull a report of all the bids selected by the officers but will not assign any jobs to any officers. This is used for unique scenarios where you want to assign officers based on rules outside the Bid logic.

PUBLISH TO

Select the officers to whom you want to publish the shifts/requests.

• Agency - If you want to send out only to the agency, you would select an agency and all the officers for that agency would be populated in the list. The sequence number for the officers will be their sequence in the agency profile.

• **Groups** – You can also send it to a certain group(s), the officers in that group will be added to the table below. The sequence number for the officer will be their sequence number in the group(s).
• **Officers** – You can select individual officers in addition to those included in the agencies and groups
Once you have selected your list of officers you can change their sequence numbers without impacting their original sequence number in their agencies or groups. You can have more than one officer with the same sequence number, those with the same sequence numbers will see the open jobs at the same time.

IMPORTANT – If you select an agency and group(s) or several groups where the officer exists in more than one, the lowest sequence number of all those agencies/groups will be listed in the table.
• **Sequence Start Number** – This number determines where you want the sequence to start. For example, if you selected 25, it would start with the officer(s) with a sequence of 25, continue to the end of the sequence, continues with 1, and ends with 24 (assuming there are still available shifts).

IMPORTANT – You can only have one sequence number per officer, the bid engine will not work if there is more than one officer in a sequence.

PUBLISH SUMMARY
Provides a summary of all your selections for the publish. It allows the ability to review and edit any sections prior to publishing.

Add Request - Allows you to select or unselect entire requests from the Dashboard page.

Add Shift - Allows you to select or unselect specific shifts from the Dispatch page.

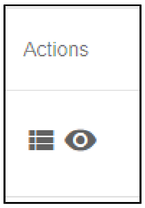
- Click here to edit the different sections to make changes.

Publish - Click here to Publish

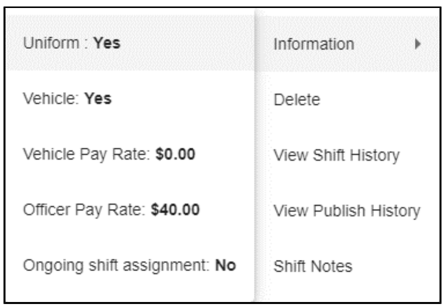
Publish History

Publish history allows the user to view all the information surrounding past publishes as well as the ability to UNPUBLISH or REPUBLISH requests and shifts.

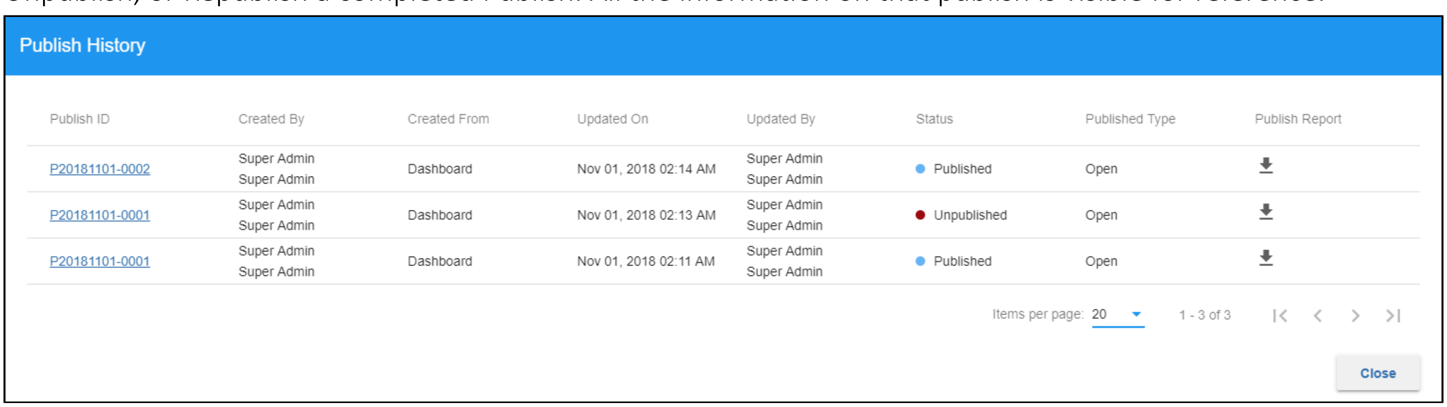
DASHBOARD – If an entire Request has been published, an eye icon will appear under the actions section next to the View Request Details icon. Click on the eye icon to open the Publish History



DISPATCH – If individuals shifts were published you will need to identify the shift(s) and select View Publish History under the Actions dropdown for that shift.



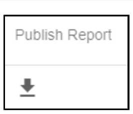
You can see the history of when each Request was Published/Unpublished. By clicking on the Publish ID you will open up the Publish Summary section. From the latest Publish, you can either edit/cancel a Scheduled Publish, Unpublish, or Republish a completed Publish. All the information on that publish is visible for reference.


Publish History

Publish ID	Created By	Created From	Updated On	Updated By	Status	Published Type	Publish Report
P20181101-0002	Super Admin Super Admin	Dashboard	Nov 01, 2018 02:14 AM	Super Admin Super Admin	Published	Open	
P20181101-0001	Super Admin Super Admin	Dashboard	Nov 01, 2018 02:13 AM	Super Admin Super Admin	Unpublished	Open	
P20181101-0001	Super Admin Super Admin	Dashboard	Nov 01, 2018 02:11 AM	Super Admin Super Admin	Published	Open	

Items per page: 20 1 - 3 of 3

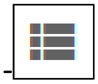
Close

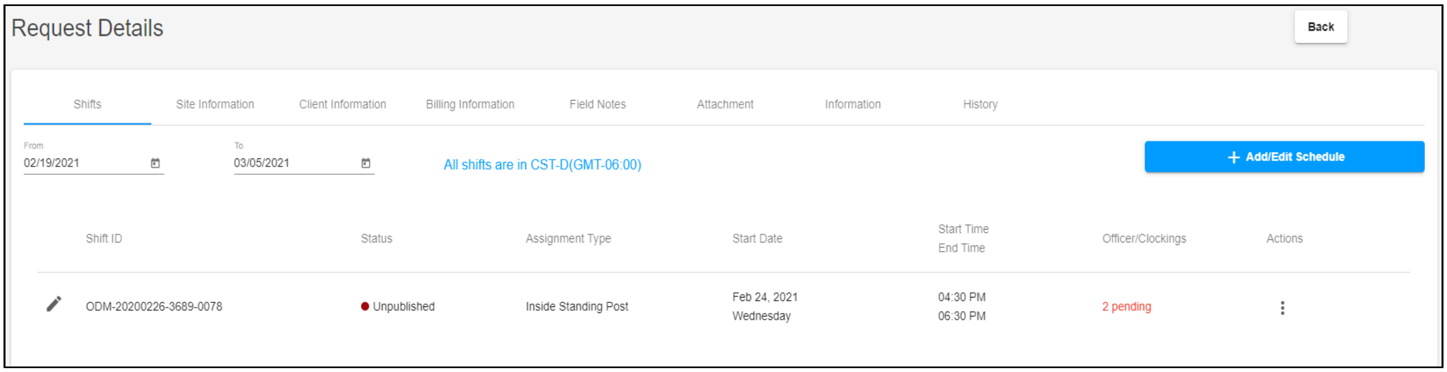


PUBLISH REPORT

Each time a Publish is completed, the data surrounding that Publish is captured in a Publish Report. This report is downloadable in Excel and provides all the information on the Publish including officer selections/assignments including timestamps.

Request Details

REQUEST DETAILS - 



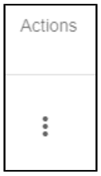
- Takes you back to Dashboard, retaining any filters or sorts you had in place.

SHIFTS – Provide shift information using the From / To date ranges. Shows the shifts, specific information about each shift, and real-time status of officers including their clock-in and clock-out times, officer names, and unfilled shifts.

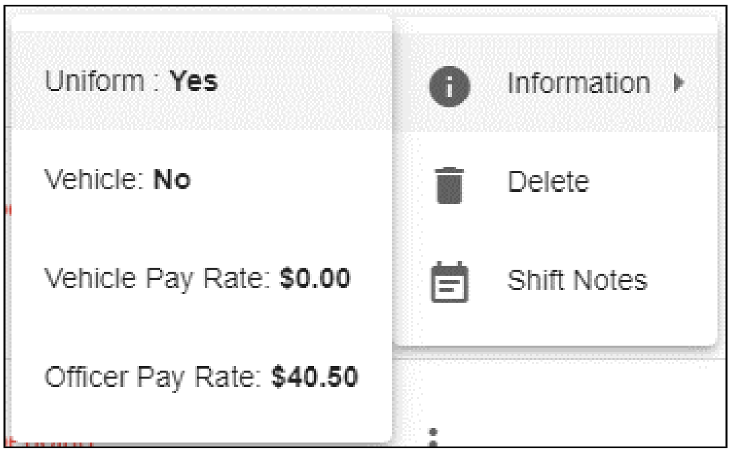
- Click on this to edit the entire request. You can edit, delete and add shifts to the entire request. You can also change the Matching Agency here.

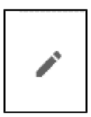
****Important** When you end date a repeating shift or delete a shift from here, there will not be a record of the deleted shift in the system. In addition, you will not be able to restore the deleted shift(s). Any officers assigned to the shifts will be removed and receive a notification, however, you will not be able to audit the shift.**

Shift Actions

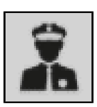


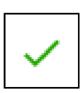
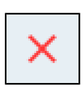
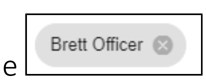
Click on three dots to see more information on the shift



 - Use this to edit individual shift times. If an officer is already assigned to a shift they will receive a notification on their App that their shift has been changed.

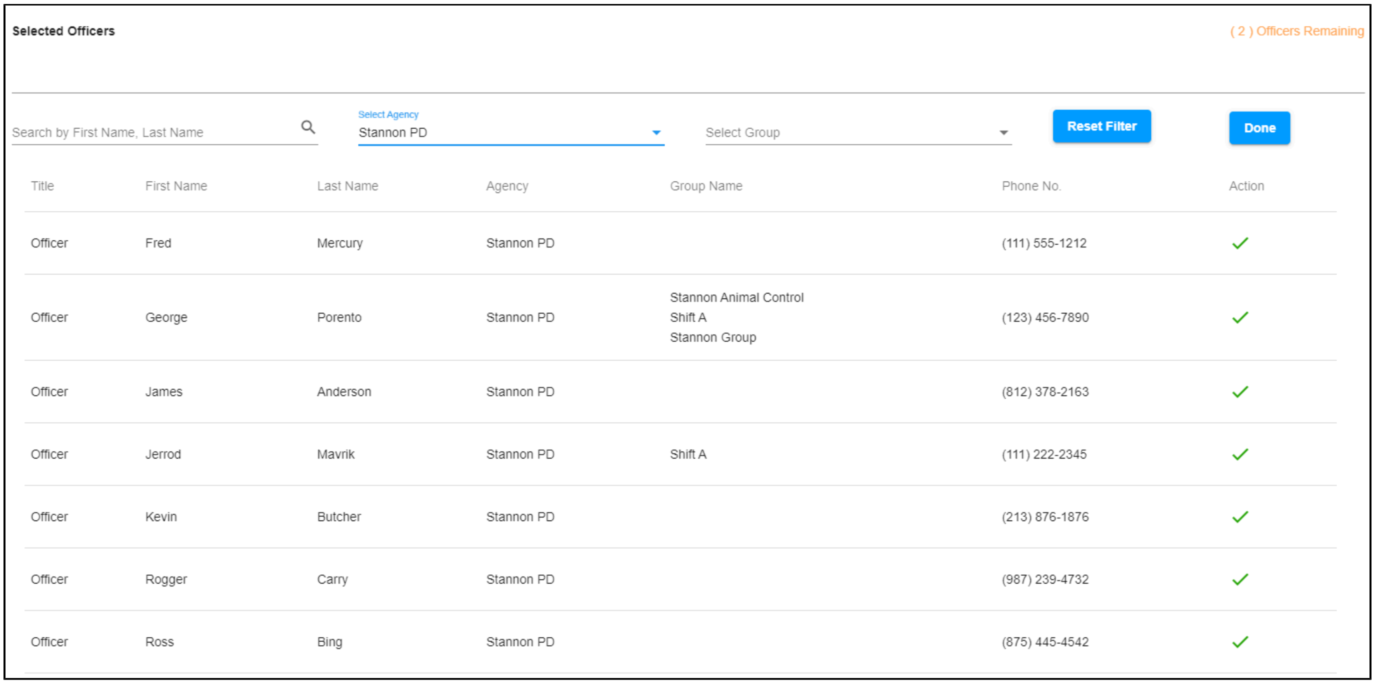
When changes are made at the shift level they are disconnected from any repeating functionality in Add/Edit Schedule.

 - Assign or un-assign specific officers from a shift. If you add or remove an officer they will receive a notification depending on what action was taken.

Click on  to add an officer, click on  or the X next to the officer's name 

to un-select an officer. Added officers will appear in the top left corner in blue. Click DONE when finished.

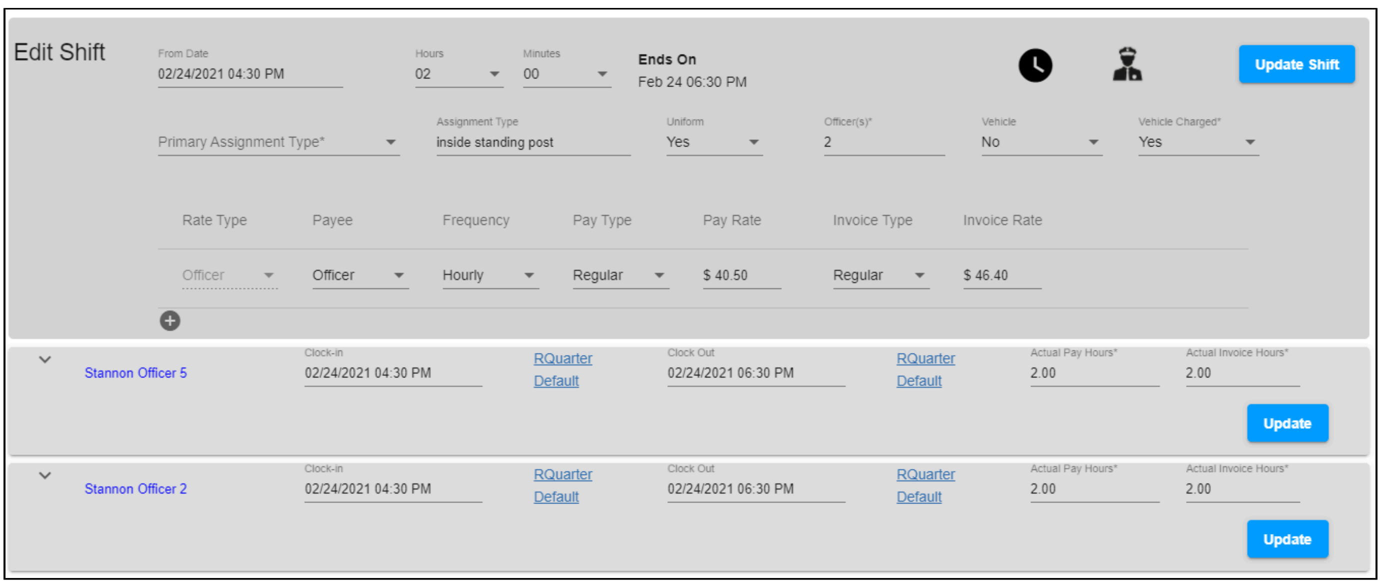
When assigning / unassigning officer(s), you will be required to enter a reason code. This information is stored in the Shift Info on Dispatch and available in Dropped Shift report.

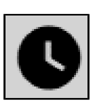


Selected Officers (2) Officers Remaining

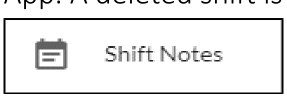
Search by First Name, Last Name | Select Agency: Stannon PD | Select Group | Reset Filter | Done

Title	First Name	Last Name	Agency	Group Name	Phone No.	Action
Officer	Fred	Mercury	Stannon PD		(111) 555-1212	✓
Officer	George	Porento	Stannon PD	Stannon Animal Control Shift A Stannon Group	(123) 456-7890	✓
Officer	James	Anderson	Stannon PD		(812) 378-2163	✓
Officer	Jerrod	Mavrik	Stannon PD	Shift A	(111) 222-2345	✓
Officer	Kevin	Butcher	Stannon PD		(213) 876-1876	✓
Officer	Rogger	Carry	Stannon PD		(987) 239-4732	✓
Officer	Ross	Bing	Stannon PD		(875) 445-4542	✓



 - Allows you to add or modify clockings for an officer.

- Delete the shift, if officers are already assigned shifts they will receive a notification on their App. A deleted shift is stored in the background and can be restored on the Dispatch page.



- Shift Notes, allow you to create a note for that shift. Agency Special Admin notes can only be seen by Agency Admins, ODM notes can only be seen by ODM. Officers do not see these notes in the

OfficerTRAK® app. Notifications are also included here for all shift-related notifications between Officers and Admins.

When a new note has been created, the unread icon  will appear next to the shift. Clicking on the icon will take you to the shift notes section. To mark the note unread, unselect the Read / Unread box next to the note.

Once there are no more unread notes, the icon will change to 

Site Information

SITE INFORMATION – Detailed information about the request including location, Geo-fence, Onsite contact info, alcohol served info, and brief service description.
This service description is also visible to the officer on their mobile app.

You can modify information on the request and hit UPDATE to apply changes.

Client Information

CLIENT INFORMATION – Basic information about the person requesting the service. You can edit the Requestor's name and phone number here.

Billing Information

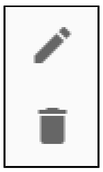
BILLING INFORMATION – Information including billing details for the request. You can edit the billing information for the request here.

Field Notes

FIELD NOTES – Information generated by the officers, system, and admins is visible here including the GPS location of where the action took place. Click on the link to view the location on a map in relation to the request location. Utilize the From / To date range to expand / reduce the information visible.

Click on Export notes to export the notes to Excel.

ADD NOTES - Allows you to add a field note to a request including text, pictures, and video.

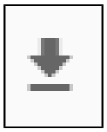
 - Edit and delete officer field notes.

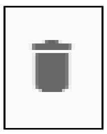
Lat:29.7996811
Lon:-95.8240464 - Hyperlinked GPS coordinates of where the activity took place. Click on the coordinates and a map will pop up showing you the coordinates in relation to the request location.

Attachments

ATTACHMENTS – Up to 5 PDF attachments can be included to provide better guidance and information on the request (Maps, Post Orders, Schedules, etc.). Officers are able to view these attachments on the mobile app. If the attachments are for Law Enforcement only put a check next to Law Enforcement Sensitive when adding an attachment. This will make them only visible to Officers & Admins, no requester can see these.

- Add PDF document(s) to request.


- Download / View attachment.


- Delete attachment.

Information

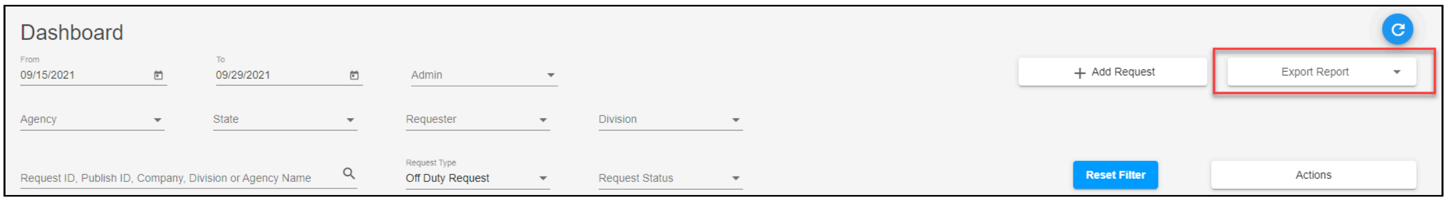
INFORMATION – Shows specific request information including additional details not shown on the Dashboard.
Admin Assignee can be changed here as well.

History

HISTORY – Shows history for the request

Dashboard Reports

Dashboard reports were designed to export in Excel format, allowing for better data management and formatting. The Export button is located at the top right corner of the Dashboard.
Click on it to show the available reports.



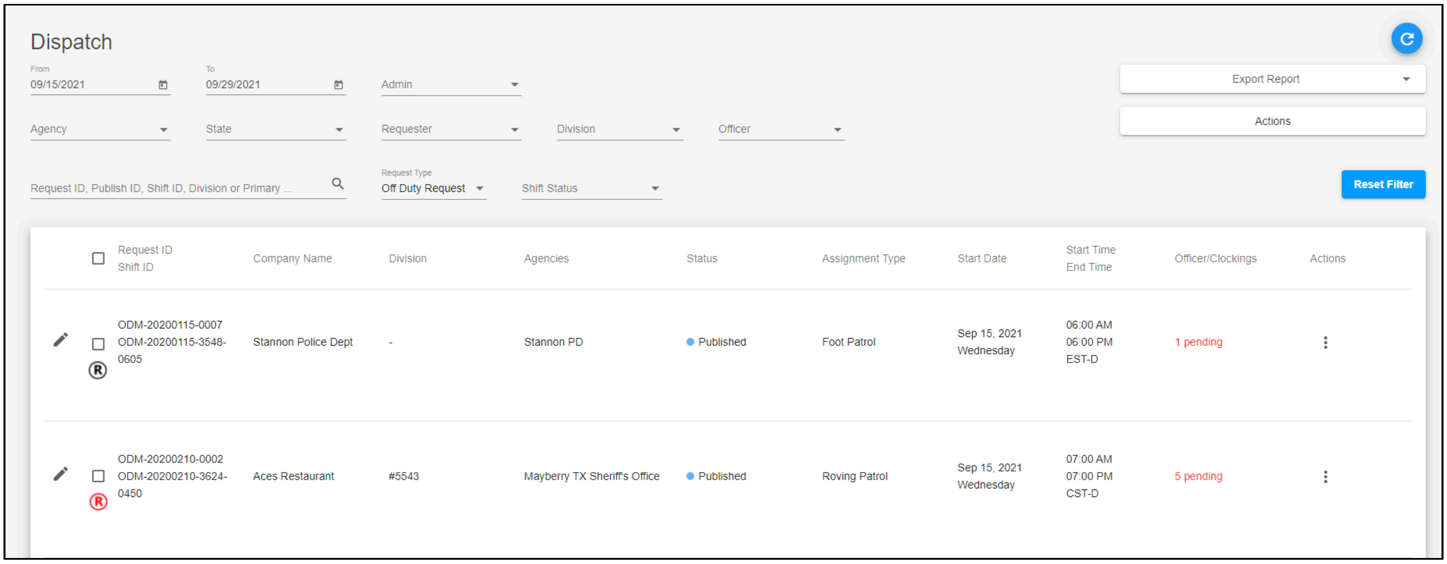
PAYROLL EXPORT –Information used for payroll that pulls officer clocking information into a pre-formatted file.

SHIFT INFO EXPORT – A more comprehensive report that pulls data based on what is entered in the Dashboard filters. This pulls important information on a request including officer activity, requester information, etc. This is a good report to run to determine the status of a request and find unfilled shifts, officer hours, etc. on a larger scale. This report can be run in the past and future.

PAYROLL/INVOICING EXPORT- This is identical to the SHIFT INFO EXPORT and includes payroll and invoice amounts if they have been entered for the shifts.

Dispatch

This page allows for the ability to see upcoming shifts, regardless of the requester to be able to check and manage shifts quickly and efficiently. This also allows the user to Publish specific shifts instead of entire requests, providing greater flexibility.



Filters

Basic information about each request is shown on the dashboard. You can utilize the filters to condense the information you want to view. The filters provide search and multiple select options. Once you have entered the information in the filters you would like to see, click on the Apply Filter button for that filter to see the results.

- From / To Date Range – this will show requests in which shifts appear for that date range. All other filters will only show the values for that date range.
- Requester – This is the company name, in the event an individual is requesting service their name will be the company name.
- Division- This is a referenced category set by the requester.
- Officer – You can filter by officer name, pending, clock in missing, and clock out missing.
- Created By - Allows Agency Admins the ability to view and filter ODM vs. Agency managed requests.
- Request Status* – Five different statuses- Approved, Canceled, Published, Rejected, Unpublished.
- Search Request – This allows you to search for other values on the dashboard.

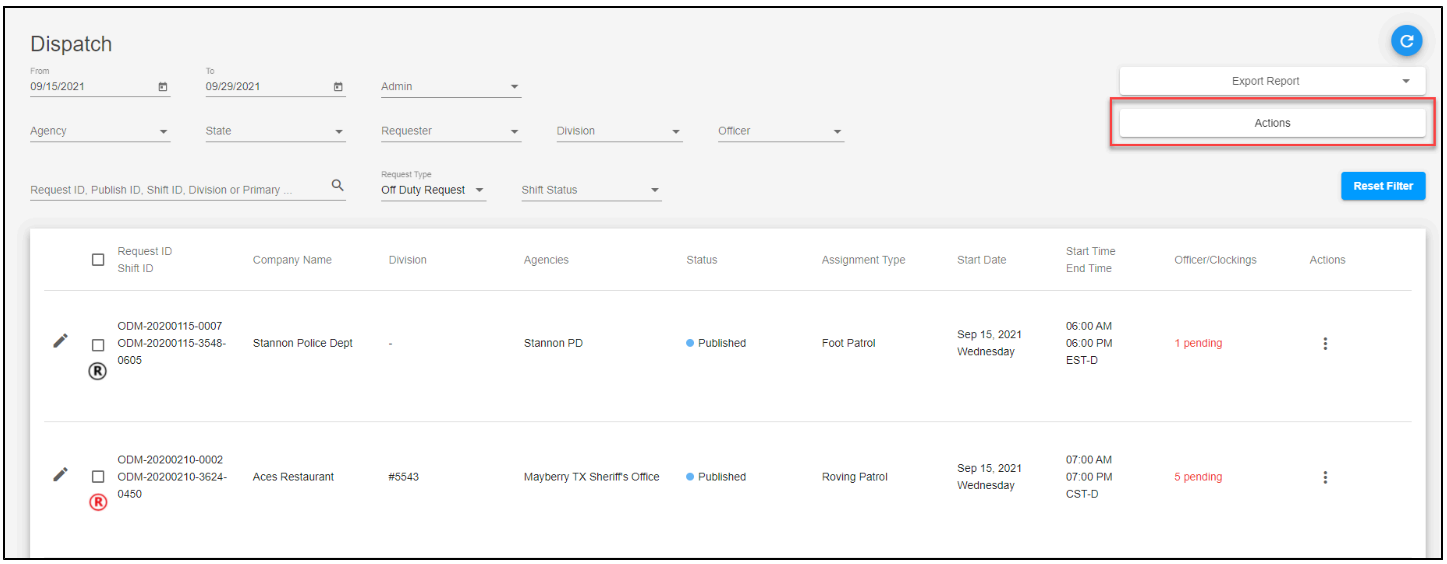
*You must manually select Rejected and Canceled to see them on the Dashboard.

Actions

ACTIONS

By selecting one or more shifts using the check boxes to the left of the shift, you can take the following actions:

- **Cancel** – Shift must be in Approved or Unpublished state to be canceled. When canceling shift, any assigned officers are removed, receive removal notification, and disappear from the Dispatch page.
- **Re-approve –** For the Canceled shift, you can re-approve the shift and it reappears on Dispatch in Approved status.
- **Restore** – For deleted shifts (from Dispatch), you can restore a shift back to Approved status.
- **Publish-** Publish out one or more shifts.
- **Notify** – Notify officer(s) at shift level. Must be at least one officer on shift to use Notify.

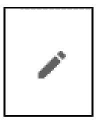


Shift Actions

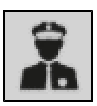
The shift actions section will allow the user to manage the shift:

Uniform : **Yes**	Information ▸
Vehicle: **Yes**	Delete
Vehicle Pay Rate: **$0.00**	View Shift History
Officer Pay Rate: **$40.00**	View Publish History
Ongoing shift assignment: **No**	Shift Notes

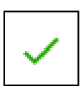
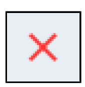
Hovering over the information button will display uniform and vehicle requirements along with vehicle and officer pay rates.



- Use this to edit individual shift times. If an officer is already assigned to a shift they will receive a notification on their App that their shift has been changed. **When changes are made at the shift level they are disconnected from any repeating functionality in Add / Edit Schedule.**



- Assign or un-assign specific officers from a shift. If you add or remove an officer they will receive a notification depending on what action was taken.

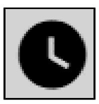
Click on  to add an officer, click on  or the X next to the officer's name 

to unselect an officer. Added officers will appear in the top left corner in blue. Click DONE when finished.
When assigning / unassigning officer(s), you will be required to enter a reason code. This information is stored in the Shift Info on Dispatch and available in Dropped Shift report.

Selected Officers (2) Officers Remaining

Search by First Name, Last Name | Select Agency: Stannon PD | Select Group | Reset Filter | Done

Title	First Name	Last Name	Agency	Group Name	Phone No.	Action
Officer	Fred	Mercury	Stannon PD		(111) 555-1212	✓
Officer	George	Porento	Stannon PD	Stannon Animal Control Shift A Stannon Group	(123) 456-7890	✓
Officer	James	Anderson	Stannon PD		(812) 378-2163	✓
Officer	Jerrod	Mavrik	Stannon PD	Shift A	(111) 222-2345	✓
Officer	Kevin	Butcher	Stannon PD		(213) 876-1876	✓
Officer	Rogger	Carry	Stannon PD		(987) 239-4732	✓
Officer	Ross	Bing	Stannon PD		(875) 445-4542	✓

 - Allows you to add or modify clockings for an officer.

Delete - Delete the shift, if officers are already assigned shifts they will receive a notification on their App. A deleted shift is stored in the background and can be restored on the Dispatch page.

View Shift History - Shows all history for that shift, helpful when investigating what activity took place for that shift.

Shift History

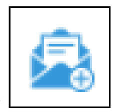
Shift ID	ODM-20200720-4095-0016	Company Name	Aces Restaurant	From 07/01/2020
Request ID	ODM-20200720-0003	Current Status	Published	To 08/17/2020

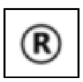
Search by name | Reset Filter

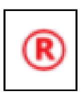
Updated By	Updated On	Status	Reason	Past Settings	Current Settings	Officer	Notes
Super Admin Super Admin	Aug 17, 2020 10:13 AM	Published	Officer Assign Changed		S Officer 2		
Super Admin Super Admin	Jul 20, 2020 11:42 AM	Published	Status Changed	Approved	Published		
Super Admin Super Admin	Jul 20, 2020 11:42 AM	Approved	Status Changed	Waiting For Approval	Approved		
Super Admin Super Admin	Jul 20, 2020 11:39 AM	Waiting For Approval	Created				

- Provides a history of publishes for that shift. Shows the same information as Publish History on Dashboard, however, if the shift is only published through Dispatch will only appear here.

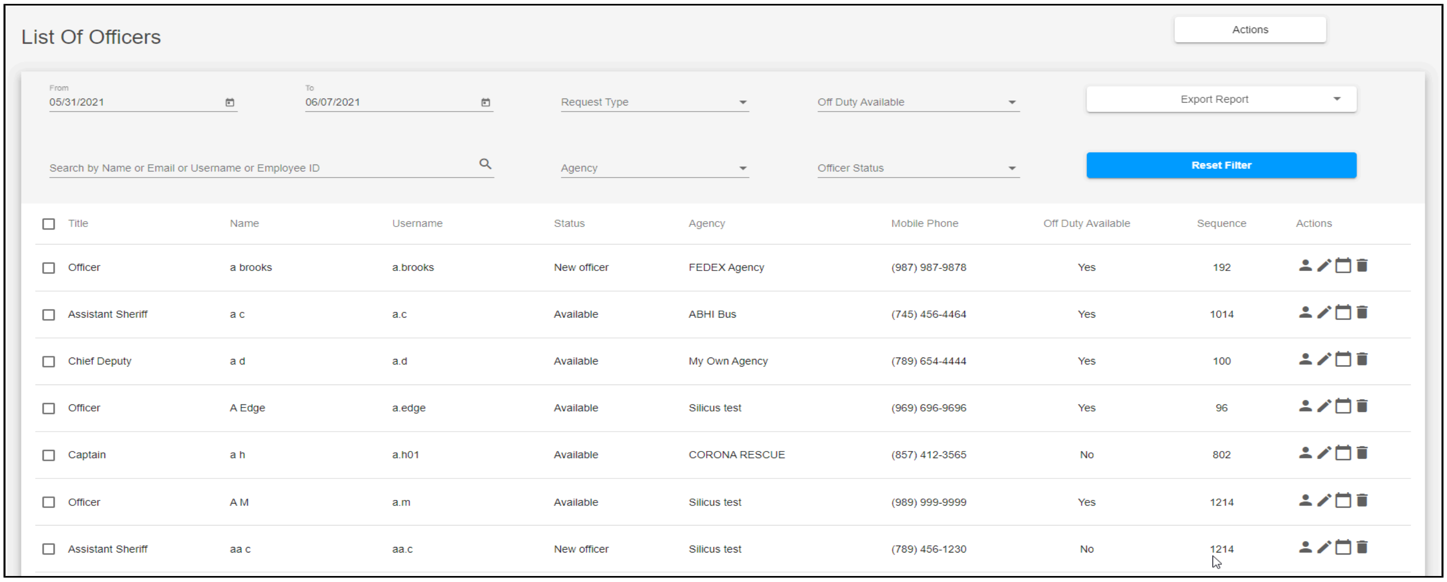
- Shift Notes, allow you to create a note for that shift. Agency Special Admin notes can only be seen by Agency Admins, ODM notes can only be seen by ODM. Officers do not see these notes in the OfficerTRAK® app. Notifications are also included here for all shift-related notifications between Officers and Admins.

When a new note has been created, the unread icon  will appear next to the shift. Clicking on the icon will take you to the shift notes section. To mark the note unread, unselect the Read / Unread box next to the note. Once there are no more unread notes, the icon will change to 


- Shows when a shift is a part of a recurring shift and any changes made using the add / edit schedule could affect this shift.


- Shows, when a shift is disconnected from a recurring shift due to being edited by an Admin, and any changes made using the add / edit schedule, will not apply to this shift.

Officers



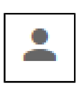
LIST OF OFFICERS – Provides information on agency officers including status, hours worked and scheduled, etc.

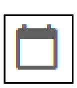
FILTERS

Mainly used to refine the information you want to view in the Officer Reports (Exports). The filters provide search and multiple select options. Once you have entered the information in the filters you would like to see, click on the Apply Filter button to see the results. Click on the Reset Filters button to clear the filter search.

From / To Date Range – this will show officers for that time range and sets the parameters for the officer reports (Exports).
Off Duty Available – allows you to search by All Status, Yes they ARE marked available or No they are NOT marked as Available.
Search Officer – This allows you to search for an officer(s) using first and last name, Email, Username, or Employee ID.
Partner Agency – allows you to search by any Partner agency names.
Officer Status- allows you to search by status, All Status', New Officer, Available, Disabled, Terminated.

ACTIONS

Click on  to view specific information on an officer including past and future requests.

Click on  to view specific information on the officer's calendar, including past and future requests.

Officer Reports

Officer reports were designed to export in Excel format, allowing for better data management and formatting. The Export button is located at the top right corner of the LIST OF OFFICERS page. Click on it to show the available reports.

OFFICER LIST- Creates a report of all officers within your agency with their status and other pertinent information including status, email, phone number, etc.

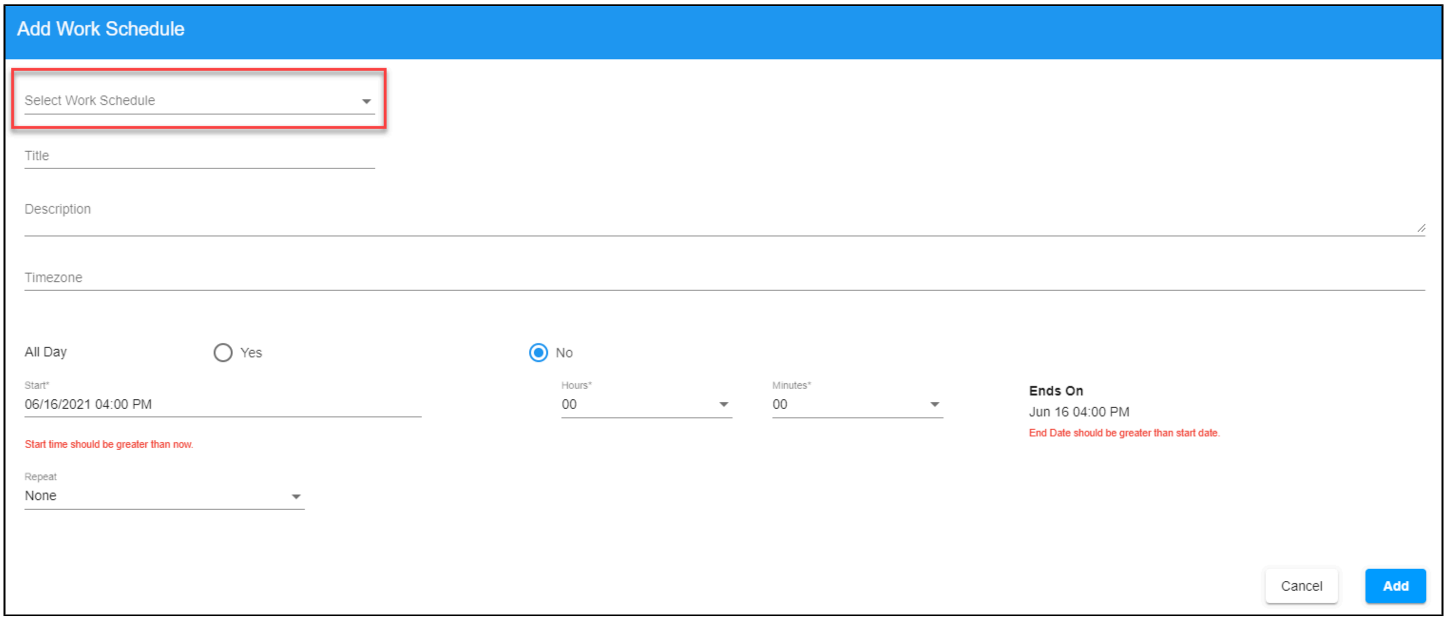
SHIFT INFO EXPORT – A more comprehensive report that pulls data based on what is entered in the Dashboard filters. This pulls important information on a request
including officer activity, requester information, etc. This a good report to run and determine the status of a request and find unfilled shifts, officer hours, etc. on a
larger scale. This report can be run in the past and future.

DROPPED SHIFT OFFICERS - Creates a comprehensive report of all officers within your agency with shifts that they accepted and then dropped for work / personal reasons based on the date range provided. This report will also show who picked up the shift.

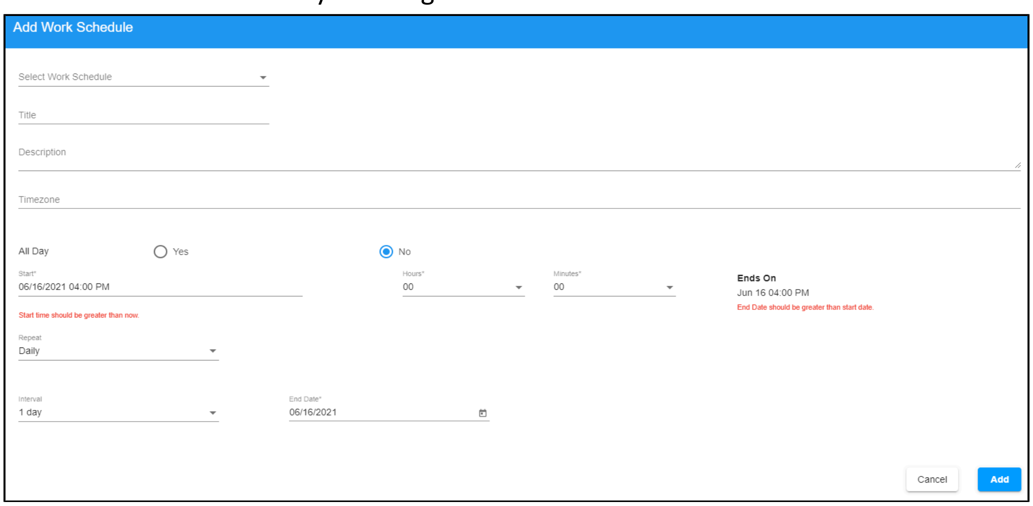
Add Individual Work Schedules

On the Officers Page, Click on the Calendar icon next to the officer's name.
This will open the Officer's Calendar to display his Work Schedule, Off Duty Shifts and Agency Shifts that they are assigned to.

Click on **+ Add Work Schedule** to open the Work Schedule Editor for this officer.



You can select an existing schedule by using the Select Work Schedule Drop Down.
Or Start a New Schedule by entering the information in the fields.

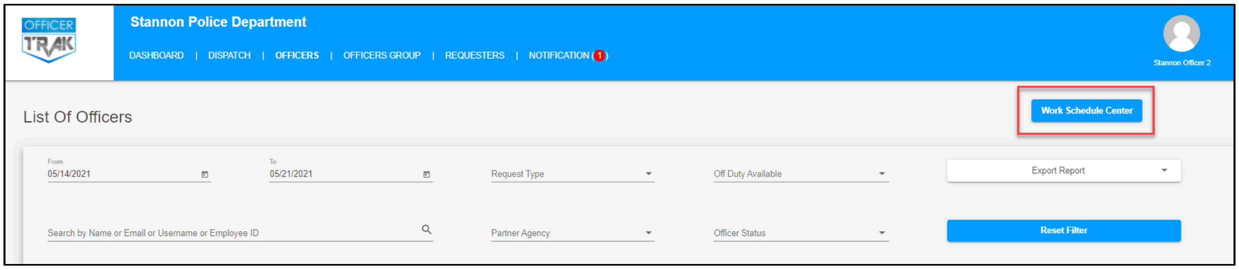


TITLE – Name you want to give this schedule, this can be found in the future with the work schedule dropdown.
DESCRIPTION – Give this schedule a description.
TIME ZONE - Select the time zone that this shift is in.
ALL DAY – Yes or No if the shift will be all-day
START DATE / TIME – Select the date and time the shift will begin on.
HOURS – Enter the number of hours this shift will entail.

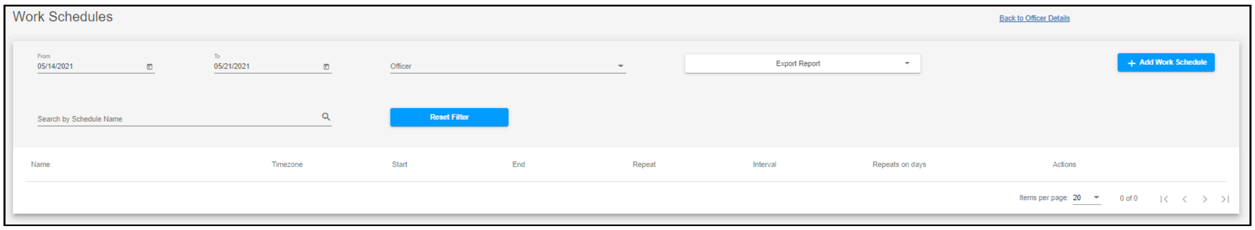
REPEAT – This allows you to have this shift repeat Daily, Weekly, or Monthly. Based on your choice additional prompts will display allowing you to select a specific day, the number of weeks, or the number of months. You will also be able to add an end date to the recurring shift.

Bulk Work Schedule Center

Enter Bulk Work Schedules using the Work Schedule Center.



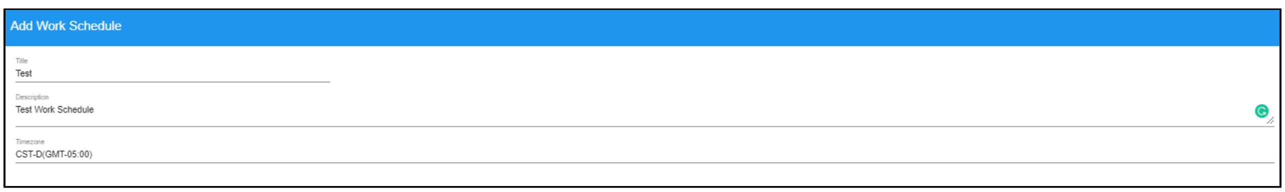
The Work Schedule Center shows all work schedules that have been created and can be filtered along with adding new schedules.



ADDING A WORK SCHEDULE

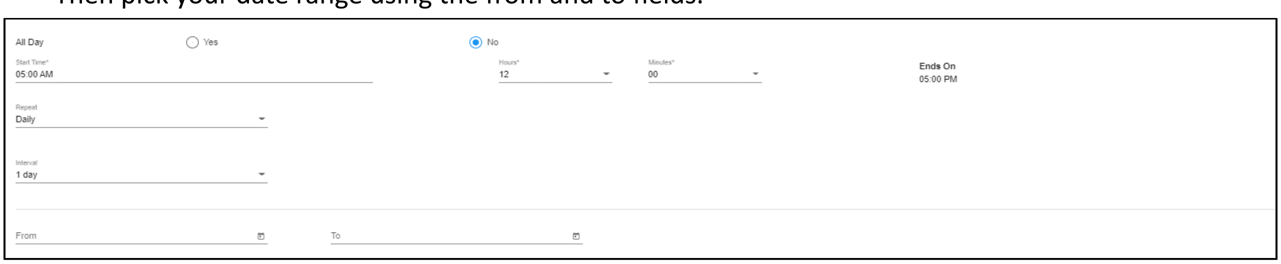
Using the Schedule Builder you can create new Work Schedules.

Begin with giving the schedule a unique name and description along with the Time Zone that you would like the schedule to fall under.

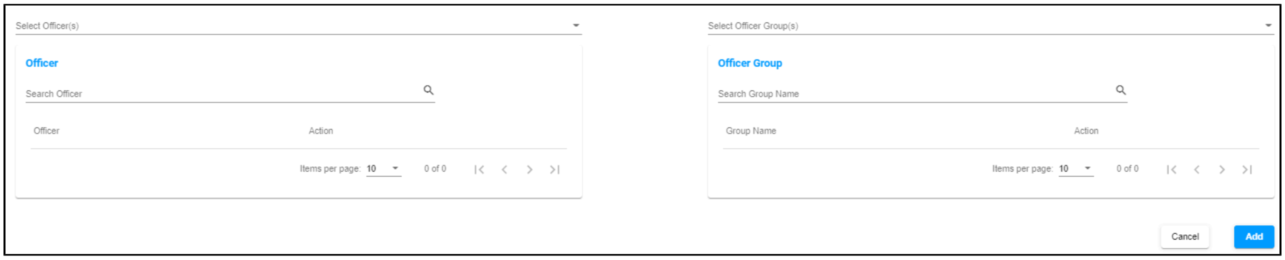


Then enter the schedule information:

- Is the shift all day or specific times – Yes or No
- Add your start time
- Add how many hours the shift is
- Does this shift repeat if so, add Daily, Weekly, or Monthly?
- If it's Daily, choose every 1 day, you can choose up to 10 Day,
- If it's Weekly, choose which weeks (choose up to 10 weeks), then choose the day(s) of the week
- If it's Monthly, choose which month (choose up to 10 months), then choose the day that it would fall on in that month.
- Then pick your date range using the from and to fields.



Once you have entered your schedule information, you can assign the schedule to specific officers or officer groups.



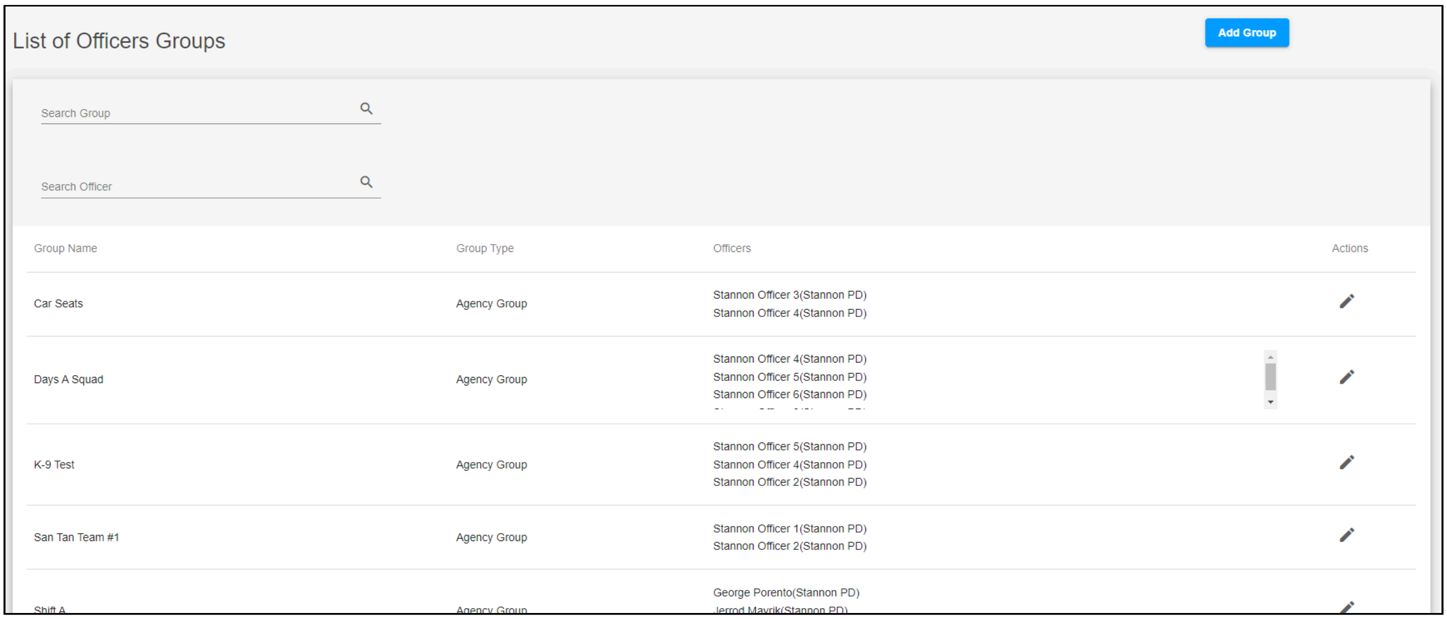
Use the Select Officer(s) drop-down or the Select Officer Group(s) drop-down to add this schedule to those officers. Once you have these selected click on the add button to create and apply this work schedule.

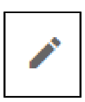
Officers Group

This section allows you to create and edit groups of officers. You can use these groups when publishing requests to unique groups of officers.

Search Group – This allows you to search for groups by name; all matching groups will pull up. Clear the search by deleting the entry in the search field.
Search Officer – This allows you to find out what groups an officer belongs to. Start typing and the respective groups will pull up. It's best to type the first name then the last name to gather the most accurate results.

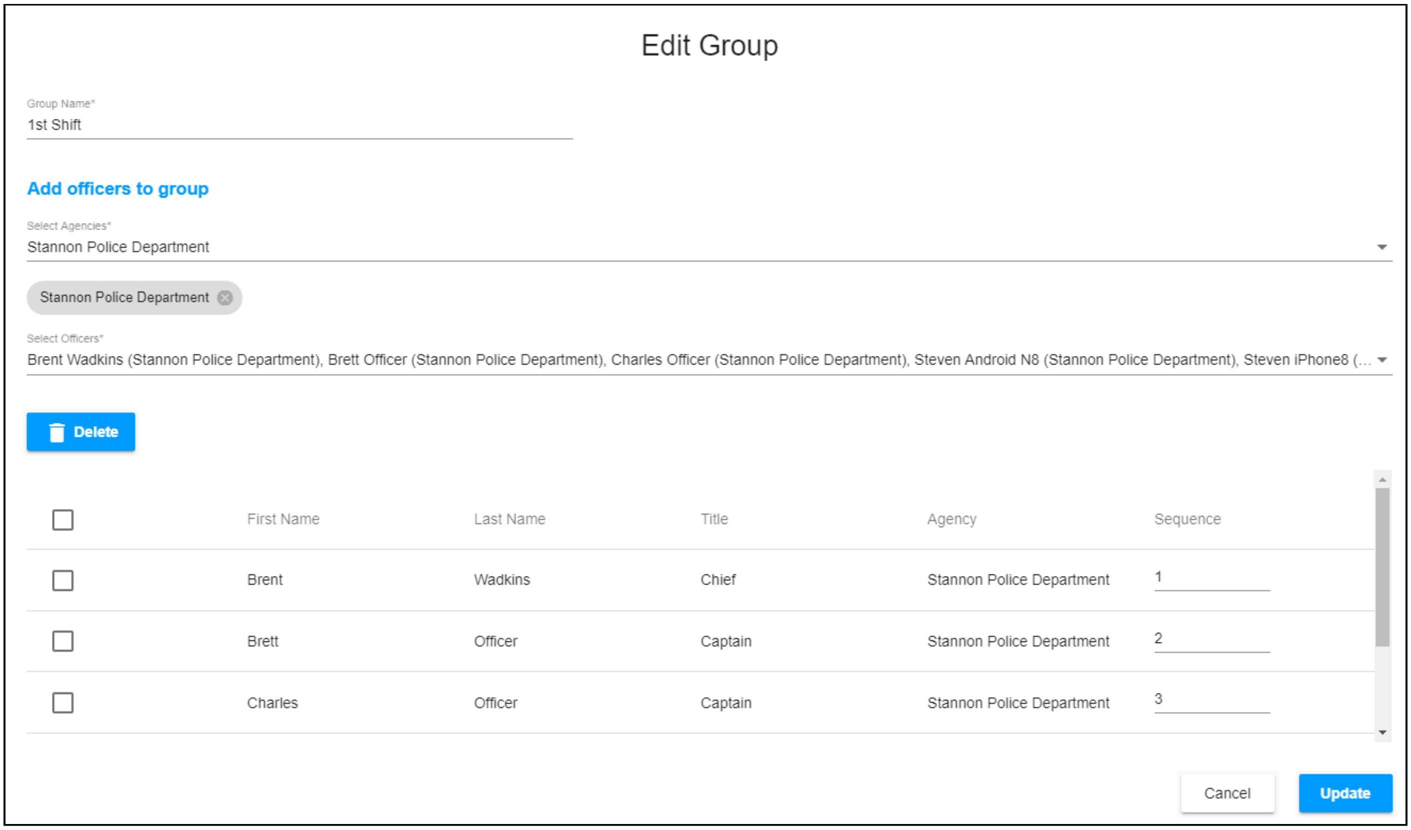
Clear the search by deleting the entry in the search field.



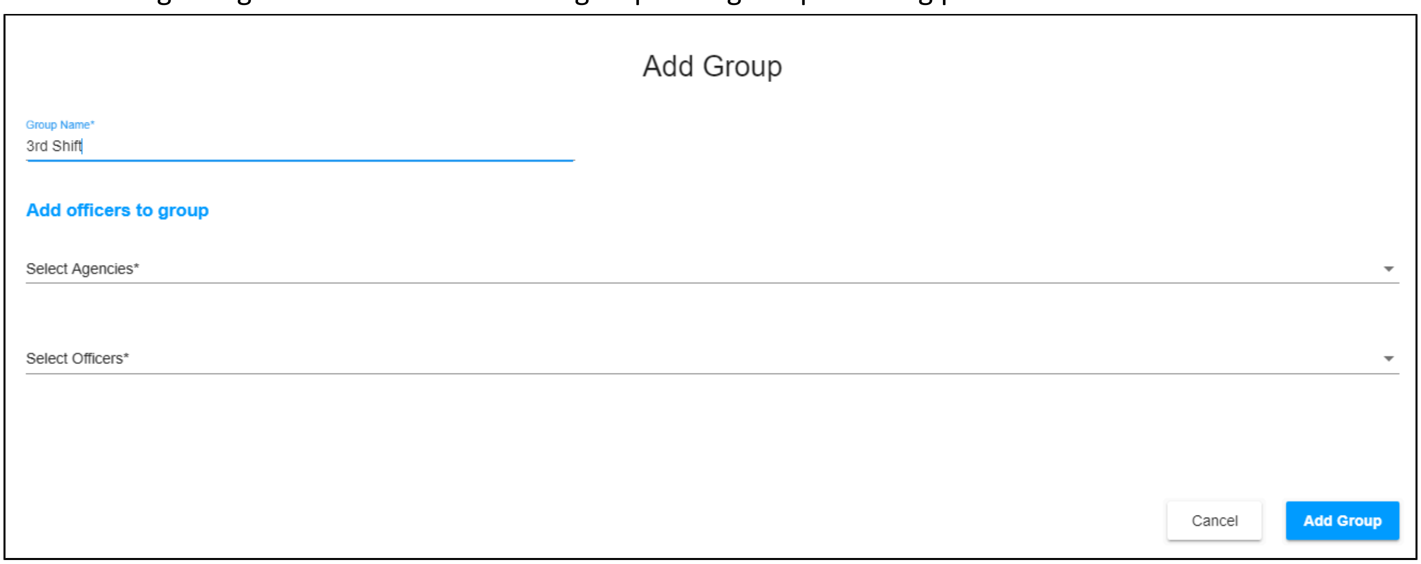
 - Edit the group; allows you to add / remove officers from the group. You can rename the group (must be a unique name). Keep agency there; then click on “Select Officers” to add or remove officers. You can also remove officers by clicking on the box next to their names. You can add a sequence number to each officer which can be used if using the sequence publish. The sequence number will default to their agency sequence number.

Click on 

to apply changes.



- Add a new group. This is almost the same process as editing a group except you're starting from the beginning. You can also add a new group during the publishing process.



Requester

Requesters are created when creating a new request. Use this page to edit the requester's existing requester information.
When creating a new request for an existing requester, go to the Dashboard page and click on “Add Request”. Select “Select an Existing Account” and select the requester from the Company Name section.

Notifications

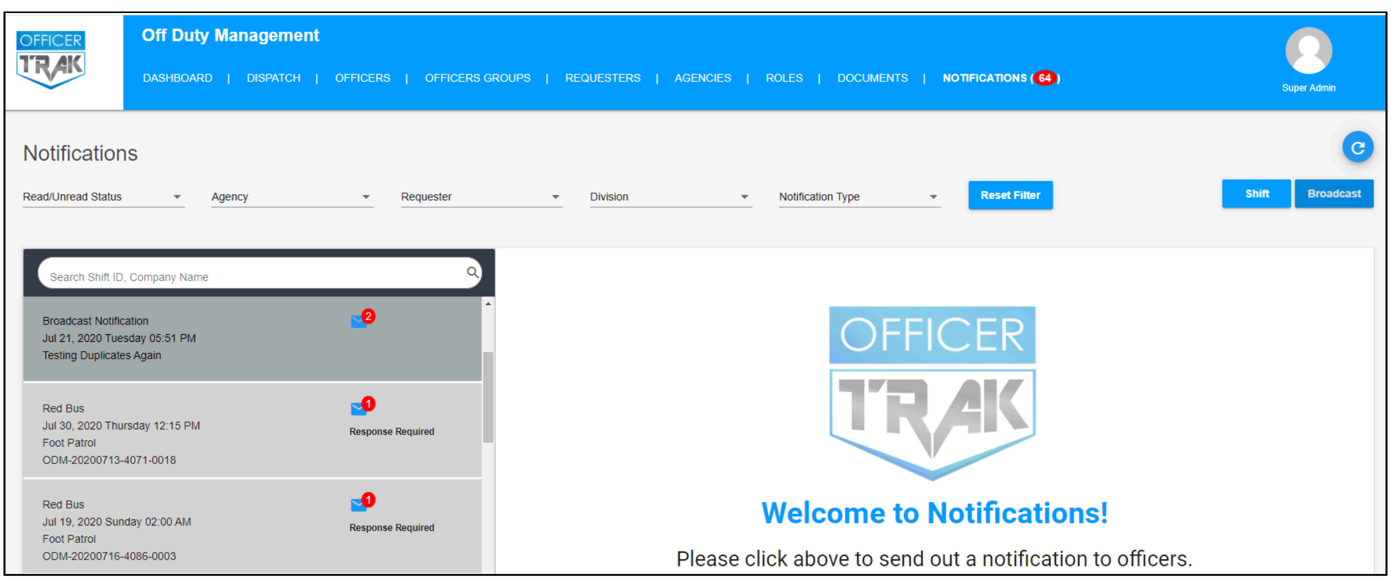
OfficerTRAK® Admins and Officers can now communicate in real-time using the new Notifications Module in OfficerTRAK®. Notifications can be sent by Shift or Broadcast out to populations.

SHIFT NOTIFICATIONS
Click on the Shift button in the top right corner of the Notifications page. It will lead you through the same process as Dispatch, however, you will need to select the shift(s).

BROADCAST NOTIFICATIONS
You can also send out notifications to populations on OfficerTRAK®. This is not tied to a specific shift and allows for maximum flexibility.

FILTER AND SEARCH
You can view active notifications on the Notifications page. Use the filter functions to find a specific notification thread. Use the search function to search by Company, Division, Shift ID, Broadcast Title, Officer Name.

VIEW INFORMATION
Shift Notifications are in light gray, Broadcast Notifications are in Dark Gray. If you click on the notification thread, it will expand if officers are on the shift and notifications available. Clicking on the thread again will give you a summary to the right of the Shift/Broadcast history.
Notification Threads are sorted by the following:
1. Highest Unread
2. If a Reply Was Requested
3. The Remaining would be by shift date



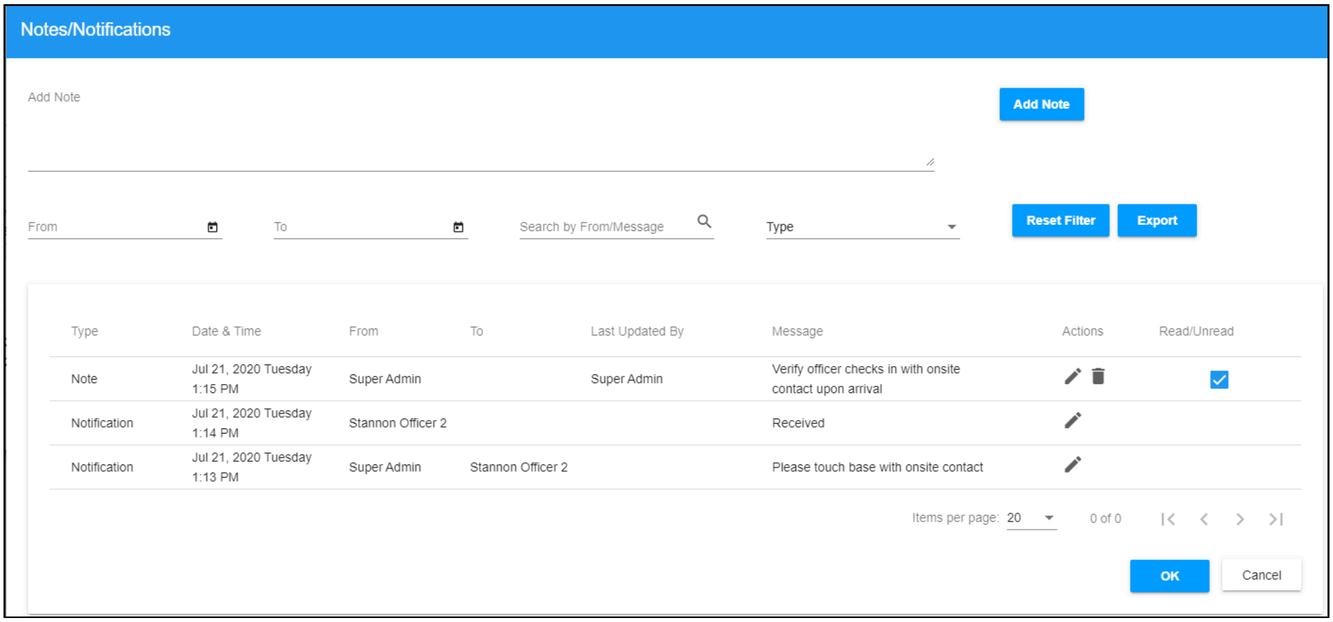
NOTIFICATIONS HISTORY
There are two ways to check notifications history, Notifications Page and Dispatch – Shift Info

NOTIFICATIONS PAGE

Notification threads remain on the Notifications page if they have any unread notifications. If no unread notifications, they remain for 7 days from the end of the shift date. Once they disappear, you can locate them by using the search function or if a notification becomes active for that shift again.

DISPATCH – SHIFT NOTES

All shift notifications are captured in Shift Notes. You can filter by just notifications and export them into Excel.

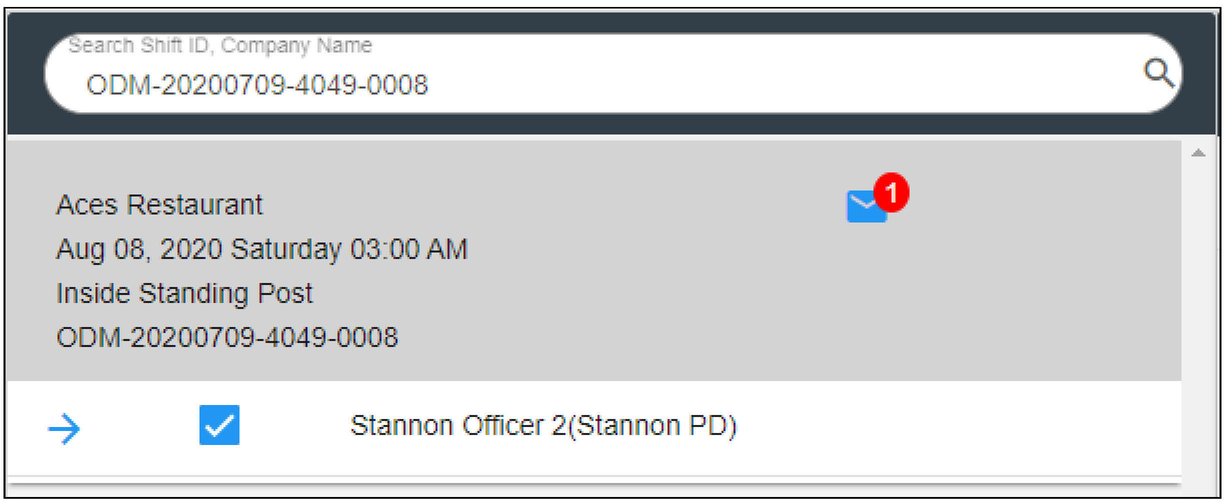


Officers to Admins

OFFICER TO ADMIN NOTIFICATION – An officer can contact an Admin by clicking on the Notify Admin button in the My Jobs Details section of the job for which they would like to communicate. When they send a notification to Admin, the following will occur:

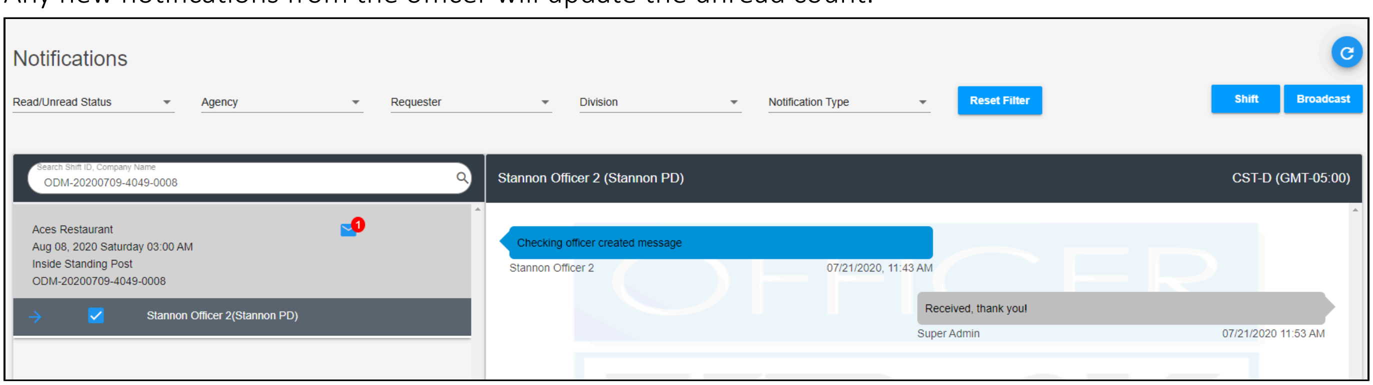
• A new notification thread will appear under Notifications on the officer's mobile app

• Dispatch Page – A notification icon will appear on the associated shift on the Dispatch page with the number of unread notifications. If you click on the icon, it will take you to the Notifications page and the specific notifications thread.
• The Notifications header count will update with the number of unread messages.
• Notifications Page – You can search by an officer, Shift ID, and/or filter to find the shift thread you would like to see. In the below example, there is one unread notification and since the arrow is pointed to the right, the officer initiated the notification for this shift. If the Admin had initiated the notification to that officer, the arrow would point to the left.



• By clicking on the Officer's name, you can read the notification and respond back and forth with the officer.

The notification icon shows how many unread notifications there are for that shift. You can uncheck the box to the left of the officer's name to mark it read. The icon will update the number of unread notifications. Any new notifications from the officer will update the unread count.



Admins to Officers

ADMIN TO OFFICER NOTIFICATION

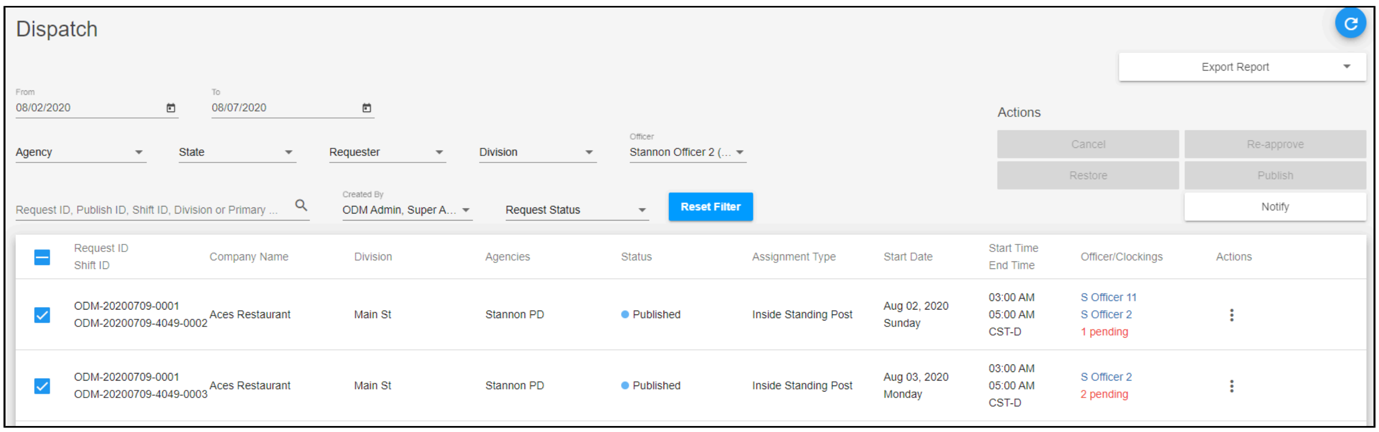
There are two ways to send notifications to officers; by shift(s) or broadcast

SHIFT NOTIFICATIONS

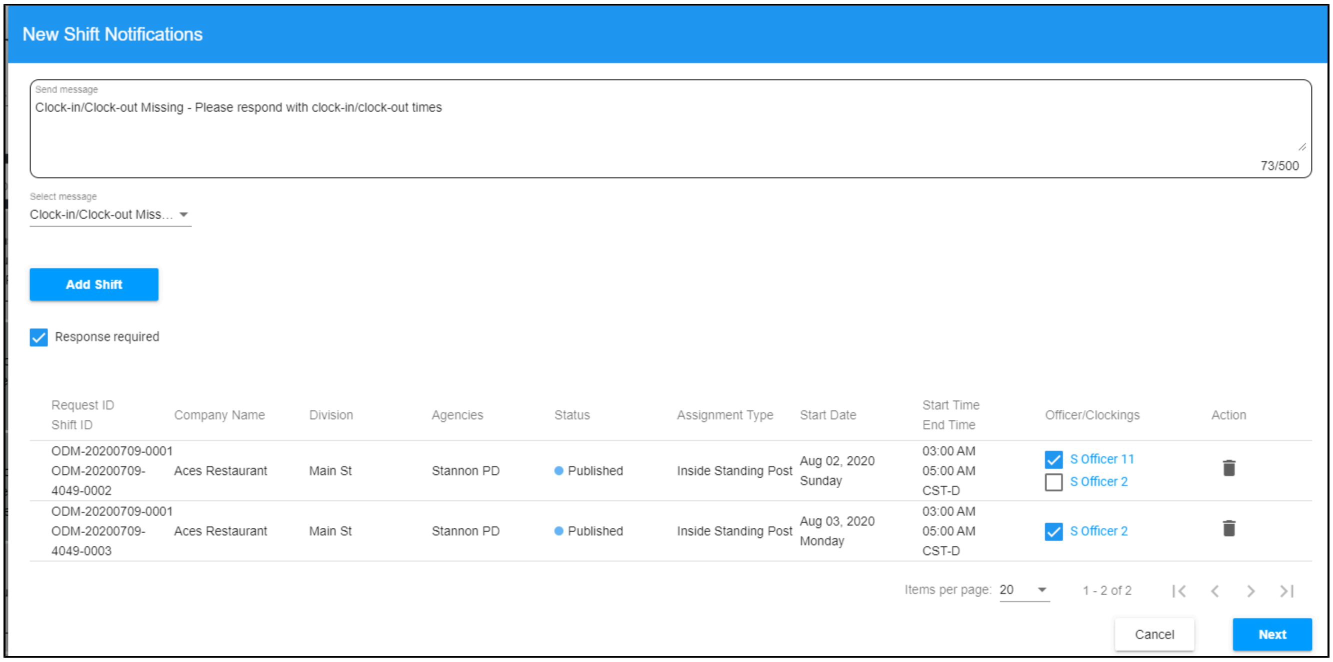
You can create shift notification(s) through either the Dispatch or Notifications Page

DISPATCH PAGE

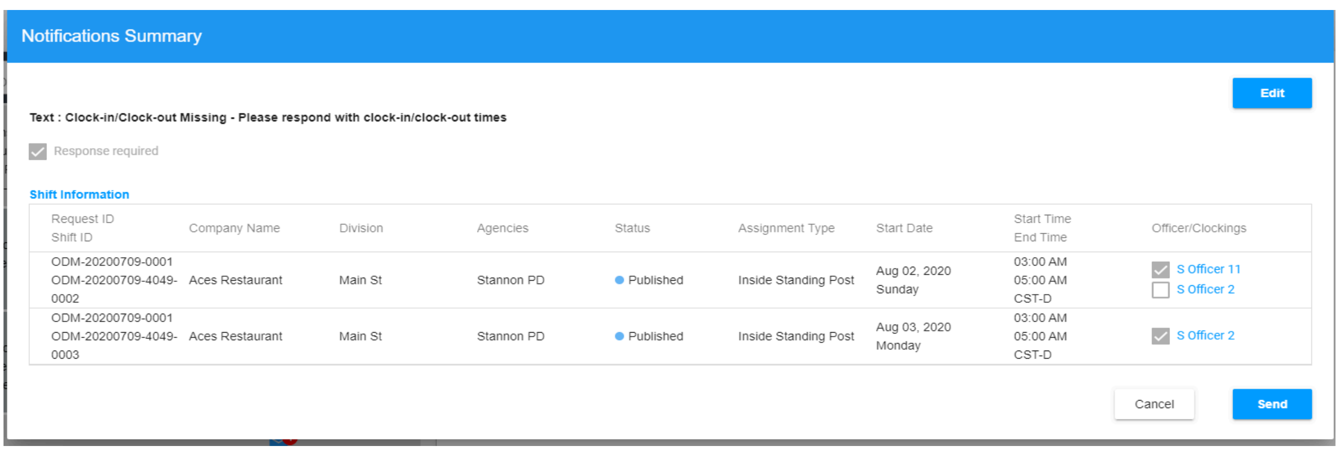
Select the shift(s) you would like to send a notification to and click on Notify



You will be directed to the New Shift Notifications screen. You can either create your own message and/or use the pre-defined messages in Select Message. If you want to add additional shifts you can click on Add Shift. If you would like the officer to respond, click on Response Required. This will flag the notification to the officer as requiring a response and prioritize it on their mobile app. You can then select or unselect any officers to which you would like to send the notification.

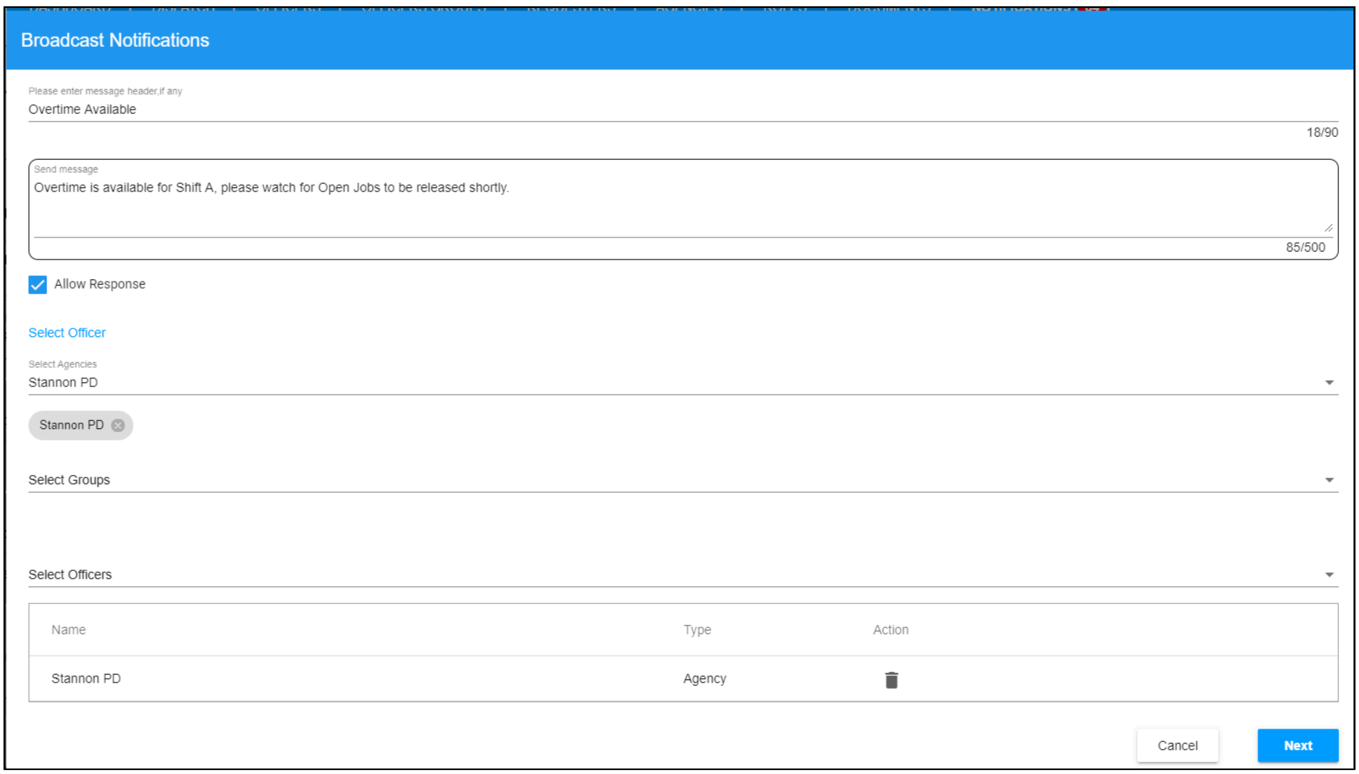


Click the Next button, and you will see a summary page prior to sending it out. You can edit or send it as is. Once sent, the officers will receive a notification on their mobile apps and will be able to respond. The shifts will then appear in the Notifications section and the Notification icon will appear next to the shift(s) on the Dispatch page.



Broadcasts

All Broadcast Notifications are created on the Notifications page. Click on the Notifications button on the top right of the page.
Create a title for the Broadcast, enter a message, and select the population you would like to send the notification to.
If you select Allow Response, the officers can respond. This is limited to a maximum of 25 officers as larger populations make the functionality unmanageable. A workaround is to send out separate notifications to different populations with less than 25 officers.
Select officers at the Agency, Group, and/or Officer level and click Next



Click the Next button, and you will see a summary page prior to sending it out. You can edit or send it as is. Once sent, the officers will receive a notification on their mobile apps.

Definitions

Requester – Refers to the customer/company requesting service.

Request ID – A unique number created once a request has been submitted for approval.
Serves as the main reference when working with the agency, ODM, customers, and officers. Formatted using YYYYMMDD-Sequence (per day) to determine when the request was submitted.

ODM Admin – Off Duty Management administrator responsible for managing your agency's off-duty requests.

Officer Status – Three statuses, Available, Disabled, Terminated. A new officer remains in a Disabled status until they log into OfficerTRAK on their mobile app and reset their password. You can determine if they have not yet logged in by running the Officer List report, their status will be New Officer.

Job Status – There are three job statuses, Waiting for Approval, Approved, and Rejected. If a request has been rejected, please see the Job Details for the reason for the rejection.

Publish – Way to distribute requests/shifts to officers for selection.