METRO PATRON INCIDENT TRACKING SYSTEM (PITS) TRAINING

CONTENTS

LOGGING IN

Go to the Intranet and click to go to METROPITS.

Your username is the first part of your work email address excluding @metrolibrary.org.

Users will need to choose to reset their password to get into the system for the first time.

For questions about logins, please contact IT. IT can also assign a new password if the password reset does not work.

For other questions about the PITS software, please contact the Surveillance System Technician.

ROLE OF CONTRACT SECURITY

Contract security staff will not receive logins for PITS. Contract security submit written reports for their agency when incidents occur. They are requested to make a copy to be provided to the Library Manager. Local managers will enter the incident into PITS on behalf of the security guard. If written reports are not provided for incidents, the local manager will contact the Security and Surveillance Technician or Security Manager.

INCIDENT REPORT FORM

The "Incident Report" main menu item is used to create new incident reports.

To access a blank Incident Report form, click the main menu item "Incident Report".

Dashboard 🚒   Incident Report 🗅   Browse Incidents 🕮   Browse People 👥   Add Person 👤   Reports   Logout ↪   ❓
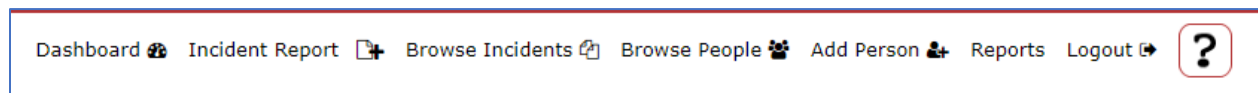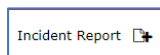
To view an existing incident report, click on one of the magnifying glass icons on the PITS Dashboard, or click a linked PITS Incident Report ID on the "Browse Incidents" or "Browse People" pages. You can also access an existing incident report from search result pages.

CREATE NEW INCIDENT REPORT

To create a new incident report, select one of the following options:

1. Click on the "Incident Report" main menu item

    Incident Report 🗅

    Name: **Doctor Evil**
    Library Card#: **Unknown**
    Date of Birth: **N/A**
    Date Added: **06/13/2019 03:17 pm**
    Current Suspension: **No**

    New Incident

2. Click on the "New Incident" button on the Browse People page to create an incident report with that person as a perpetrator
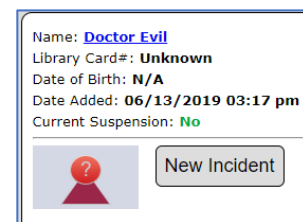
3. Click on the "New Incident" button on the Perpetrator Details page to create an incident report with that person as a perpetrator

The Incident Report form consists of 3 sections:

- **Date/Time/Location** bar
- **Tabbed elements** of the Incident Report where data is entered
- **Incident Report Sidebar** on the right provides a summary of all the data associated with the Incident Report. The sidebar also provides a set of buttons to Save, Submit, Print, or view its history.

NOTE: Initially, an Incident Report has only two tabs - an Infractions tab and Descriptions tab.

SET DATE, TIME, AND LOCATION

To begin a new Incident Report, use the "Date/Time/Location" bar to specify exactly when and where the incident occurred.

"Date/Time" of incident - The date and time fields default to the current date and time. To choose a different date, click the small calendar icon beside the date field. In the pop-up calendar, use the "Prev" link to move to the previous month, or click a specific date to select that date for the Incident Report.

"Location" of incident - The location field defaults to the user's default location or to "Select Location". Change the location by clicking on the location drop down menu and choosing a different location.

NOTE: Once the date, time, and location are saved, they cannot be changed unless the user has the "Edit IR Date/Time/Location" permission.
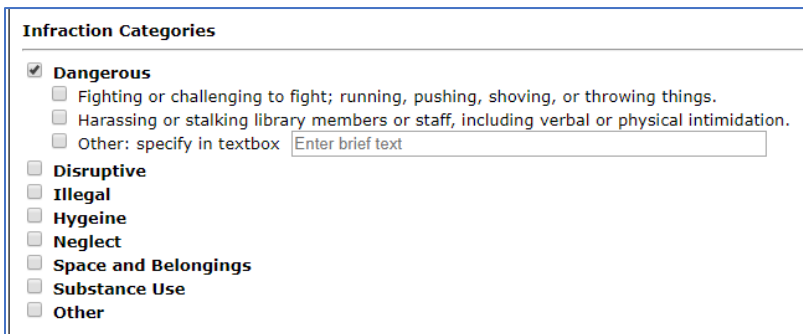
SELECT INFRACTIONS

The Incident Report Infractions tab displays a list of the top-level infraction categories. Click on one of the top-level infractions to expand that category to allow the selection of more specific infractions.

Check all infractions that apply to the current incident.

Expand as many top-level categories as needed.

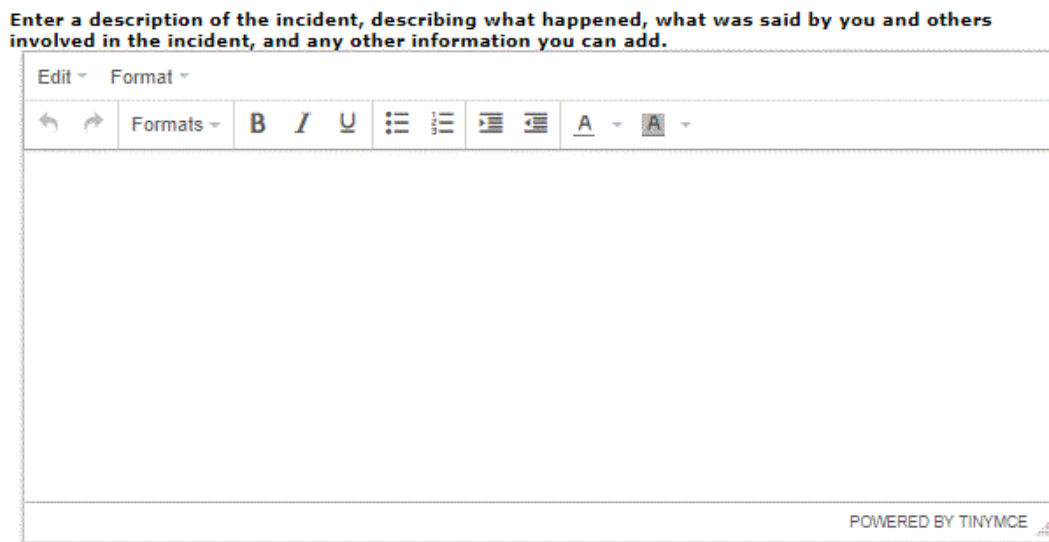Uncheck a top-level infraction to uncheck any specific infractions that are under that category.

Infraction Categories

☑ **Dangerous**
    ☐ Fighting or challenging to fight; running, pushing, shoving, or throwing things.
    ☐ Harassing or stalking library members or staff, including verbal or physical intimidation.
    ☐ Other: specify in textbox `Enter brief text`
☐ **Disruptive**
☐ **Illegal**
☐ **Hygeine**
☐ **Neglect**
☐ **Space and Belongings**
☐ **Substance Use**
☐ **Other**

ENTER DESCRIPTION OF INCIDENT

Click the "Description" tab on the Incident Report Form to add a description to the Incident Report. The "Description" tab allows formatting such as bold, italics, bullet points, etc.

Enter a description of the incident, describing what happened, what was said by you and others involved in the incident, and any other information you can add.

Edit ▾ Format ▾
↶ ↷ Formats ▾ **B** *I* U ☰ ☰ ☲ ☲ A ▾ A ▾
POWERED BY TINYMCE

Enter a description of what happened during the incident. For example, enter a full description of what the perpetrator did and said, what you did and said, and the outcome of the incident. Keep the content factual and relevant to the incident. Information included here is part of a legal record of what occurred.

NOTE: Adding an Incident Description at the time of Report creation is optional, but if you skip the description, you will receive a confirmation message when you save the Incident Report, asking if you really want to save the Incident Report without a description. <u>Always include a description of the event before submitting it.</u>

If the incident is being entered on behalf of contract security, add this information to the description.

SAVE INCIDENT REPORT

After selecting infractions and adding a description of the incident, save the report.

Click the "Save" button at the top of the Incident Sidebar.

Saving the Incident Report adds the report to the PITS database, assigns an incident report number (PITS ID), displays additional tabs, and updates the Sidebar. Additionally, an "Incident Saved" message appears in the right side of the "Date/Time/Location" bar.

The Sidebar also includes the list of infractions you selected for the incident and the incident description.

Saving an Incident Report does NOT send any notification emails. Notifications are only sent when you "Submit" the Incident Report.

STATUS: Created

Incident Details: 0000000218

| Save 🖫 | Submit ✈ | Print 🖶 | History ↺ | Lock 🔒 |

Incident ID: 0000000218
                03/17/2016 02:16 pm
                Cen: Elec Classroom

Reported By: Scott Stockton

Status: Created (NOT Submitted)

Infractions:

Hostile or Unsafe
Uncomfortable
Excessive noise
Unreasonable use of restrooms
Hidden Infractions
(DO NOT USE AFTER: 1/31/2016)DISRUPTIVE
BEHAVIOR

People:

Barney Booker

If the Incident Report has been saved, but not yet submitted, the Submit button will be in red. Once it has been submitted, the Submit button will appear as the other buttons.

The Incident Report form shows its full set of tabs, allowing you to enter additional information about the incident, such as any people involved in the incident.

At this point, continue to edit the Incident Report. Add People, Support, and upload attachments to go with the Incident Report or with specific people involved in the incident. If needed, the report can be saved here so it can be completed later.

INCIDENT REPORT TABS

Incident Report tabs allow you to select specific types of information you want to add to an Incident Report.

| ⊘ Infractions | O Description | O People | O Support | O Comments | O Notifications | O Follow Up | O Attachments |

Each tab has a small circle icon that indicates whether the tab has been edited. A green checkmark icon indicates information exists on that tab.

In the example above, Infractions have been entered but no description, people, support, comments, follow ups, or attachments have been added, and the Incident Report has not been submitted.

In addition to the circle icon, the Notifications tab is red if the Incident Report has not been submitted.

The Tabs are labeled:

- Infractions (alter the infractions selected)
- Description (add to or update Incident Description)
- People (add perpetrators, victims, and witnesses)

- Support (indicate a call to other staff, guards, or police)
- Comments (add additional thoughts about the incident)
- Notifications (lists any notifications that have been sent for this incident)
- Follow Up (indicate the follow up action(s) for this incident)
- Attachments (upload files to attach to the incident)

INFRACTIONS TAB

Click on the Infractions Tab to change the selection of specific infractions associated with this incident.

For more information on how the Infractions Tab works, see the section labeled "Select Infractions" under the "Create New Incident Report" heading.

DESCRIPTION TAB

Use the "Description" tab to edit or update the description of the incident.

To add additional information to what the original reporter entered in the Description, use the "Comments" tab. If this is your own report, edit the description if you feel it is necessary.

PEOPLE TAB

Use the "People" tab to add perpetrator, victim, and witness information to the Incident Report.

If there are already people associated with this incident, the number after the "Existing" label indicates the number of individuals. In the example above, there is one perpetrator associated with the Incident Report.

ADD OR EDIT A PERPETRATOR

To add a new Perpetrator, click the "Perpetrator" label in the "Add People to this Incident" box.

Enter as much information about the perpetrator as you can.

If you do not know the person's name or library card number, leave those fields blank, and PITS will assign a temporary name "Unknown_###" where the #'s are numerals, and it will set the library card number to "Unknown".

If you do know the person's name, enter it in the "Name" field in the format "firstname lastname".

As you begin typing, PITS displays perpetrators with the same name that already exist in your PITS database. If the name you want to use pops up in the list of matched names, select the correct name.

After setting the name and library card number, if known, enter a brief text description in the "Description" field. The text description should be brief, but as complete as possible, and it should include any information that is not covered by one of the "Person Descriptors". For example, a good text description might be:

Short African American woman, approximately 5'4", around 180 lbs., with gray hair, wearing a blue jacket and carrying a red rolling backpack.

Select a setting for each descriptor, if possible. If you are not sure of any descriptor, you can set it to Unknown.

NOTE: If you found a match when entering the name, and the person already has a description in PITS, the descriptors will automatically be set to the most recent description of this person.

When you have entered all available information, scroll down to the bottom of the Perpetrator form, and click the "Add Person" button. This saves the person's information and associates it with the Incident Report.

BE SURE TO CLICK ADD PERSON BEFORE MOVING ON. If you do not click 'Add Person', you will lose all the information on this tab when you save the report. The person will then show as 'None.'

After adding a perpetrator, expand the "Existing Perpetrators" link to show a brief record for the new Perpetrator.

To view and edit perpetrator information:

- Edit Description - edit name, library card number, descriptors
- Remove - remove person from incident report
- View Contact Info - view name, card#, date of birth, ILS Patron ID, address, email, phone
- Edit Contact Info - add/edit contact info
- Edit Aliases/Cards - add/edit aliases, additional card#
- View Comment - view person comment
- Add Comment - add/edit person comment

NOTE: The buttons that display on this screen depend on your PITS site setup and user group permissions.

ADD OR EDIT A VICTIM

To add a victim to an Incident Report, click the "Victim" radio button in the "Add People to this Incident" box.

Enter the victim's name, phone number, and email address, then click the "Add Victim" button. Expand the "Existing Victims" link to view the record for the victim you entered.

NOTE: Victim names are entered in the format "firstname lastname".

To update the victim information, edit the appropriate field(s) and click the "Update Victim" button.

To remove the victim from the incident, click the "Remove Victim" button.

ADD OR EDIT A WITNESS

To add a witness to an Incident Report, click the "Witness" radio button in the "Add People to this Incident" box.

Enter the witness's name and phone number, and email address, then click the "Add Witness" button. Expand the "Existing Witnesses" link to view the record for the witness you entered.

NOTE: Witness names are entered in the format "firstname lastname".

To update the witness information, edit the appropriate field(s) and click the "Update Witness" button.

To remove the witness from the incident, click the "Remove Witness" button.

SUPPORT TAB

The "Support" tab allows you to indicate that you called for, or received, support from other library staff, library guards, police, emergency med-techs, or the fire department.

Called Additional Staff - To indicate that you called supervisory or managerial staff, enter the person's name(s) in the text box. Entering a name will automatically check the "Yes" radio button. This will not automatically contact the user; it is for information purposes only.

Called Guard - To indicate that you called a guard, enter the guard's name in the text box. Entering a name will automatically check the "Yes" radio button.

Called Police - To indicate that you called the police, enter the police officer's name and badge number, along with the Police Report Number, if known.

Called EMT/Fire Dept - To indicate that you called emergency med-techs or the fire department, click the "Yes" buttons in the appropriate boxes and enter the report number for the agency called, if known. Entering text in these boxes will automatically check the corresponding "Yes" radio button.

You can select YES for any box without entering in the details of names or report numbers.

NOTE: After you enter any Support information, click the "Save" button at the top of the Incident Report.

COMMENTS TAB

The "Comments" tab is where library staff other than the submitter add additional information on the incident. Each person that adds information will create a different comment on the incident. This is preferable to creating multiple reports for the same event.

After entering your comment, click the "Add Comment" button.

Once your comment has been saved, it will be displayed below the "Add Comment" box.

Once a comment has been added, it cannot be edited again except by the user who created it or their Supervisor or Manager.

If you wish to change anything in one of your existing comments, simply edit the existing comment and click the "Update Comment" button. If there is no "Update Comment" button, then it is a comment created by a different user, and you cannot edit it.

NOTIFICATIONS TAB

You can use the Notifications Tab to see who will be notified when the Incident Report is submitted, or to add additional email aliases or PITS users to the notification list for this incident. The location's supervisory group will be notified for all incidents submitted at that location.

When you have entered all the information you have on the various Incident Report tabs, you click the "Submit Report" button at the top of the Incident Report Sidebar.

Clicking "Submit Report" sends email notifications to your supervisor and your manager, allowing them to review the report. In other words, you click the "Submit Report" button when you are ready to send the report on to your supervisor and manager for review.

If you have clicked the "Submit Report" button, the "Notifications" tab will indicate when the Incident Report was submitted, and who received notifications.

In addition to notification status, this screen will indicate if any users are "following" the incident.

In the example above, there are no PITS users following this incident, and it has not been submitted yet. When it is submitted, notifications will go to the incident reporter, their manager and supervisor, and any of the PITS email aliases (group emails) that are checked.

If you are a PITS user who is in the "Supervisor" or "Manager" user groups, you will see a button at the top of the "Notifications" tab that allows you to send the Incident Report to the Deputy Director for further action.
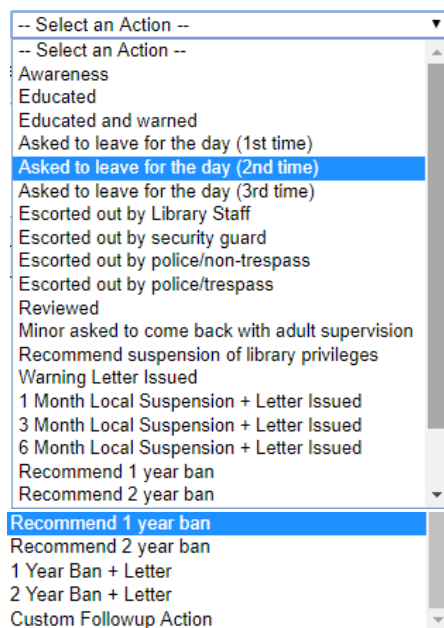
DO NOT USE THE NOTIFY DEPUTY DIRECTOR BUTTON. Regional Directors will use this to recommend a 2-year ban.

FOLLOW UP TAB

The "Follow Up" tab allows users who are in the "Supervisor" or "Manager" user groups to indicate the follow up actions imposed upon the perpetrator(s) in this incident.
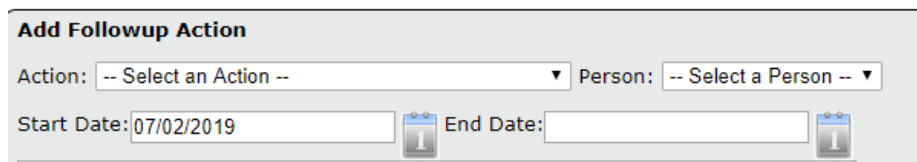
Follow up actions include:

Custom Follow-up Action can be used for shorter suspensions or follow-ups not listed here.

NOTE: All perpetrators should be added to the Incident Report before setting any Follow Up Actions.

If one or more perpetrators are associated with the Incident Report, their names will display in a drop-down list, or in a text box if there is only one. It is assumed that any Follow Up Actions are applied to a specific perpetrator. If there are multiple perpetrators, be sure to select the correct person for the Follow Up Action.
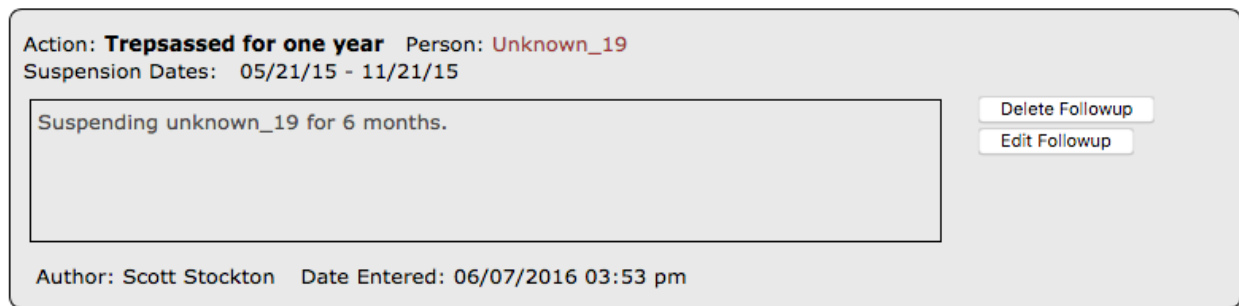

If the Follow Up Action is a suspension, enter the dates of the suspension in the date boxes. You can use the small calendar icon beside the date fields to select a date from a pop-up calendar.

Add any description you want regarding the Follow Up Action in the text box, and click the "Add Follow up" button.

Once you click the "Add Follow up" button, your Follow up Action is displayed below the "Add Follow up" form. It indicates what the follow up action was, suspension dates, if any, the note that accompanies the follow up action
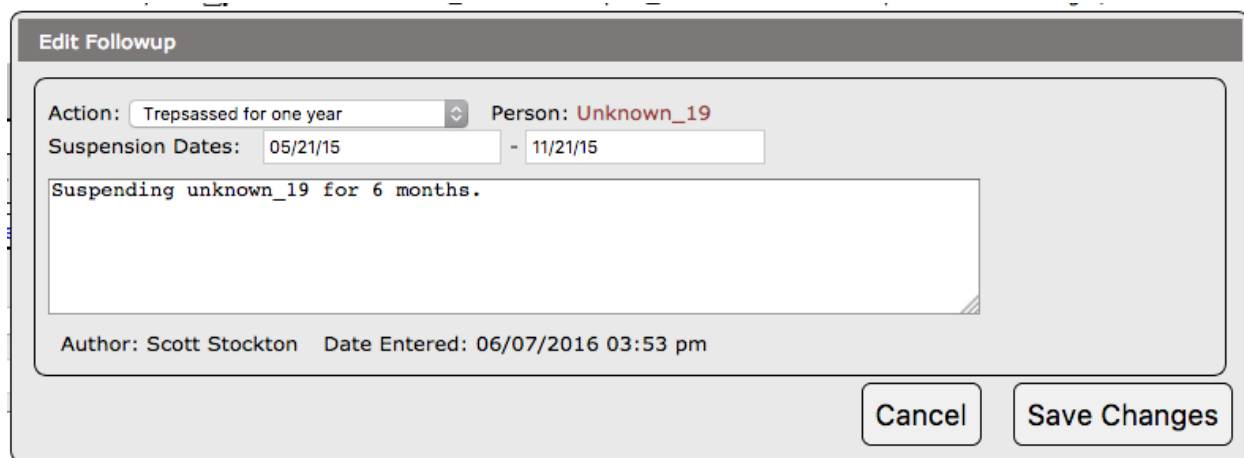
and the date and time the follow up was added.

If your user has permission to delete or edit follow up actions, the "Delete Follow up" or "Edit Follow up" buttons display beside the follow up note.

If your user does not have these permissions, the buttons will not be displayed.

Click the "Delete Follow up" button to remove the follow up action from the Incident Report and Perpetrator.

Click the "Edit Follow up" button to open a pop-up box with a form that allows you to change the follow up action, including changing from a suspension follow up to a non-suspension follow up and vice versa.

You can also change the perpetrator the follow up is associated with, if there is more than one perpetrator associated with the incident.

Additionally, you can extend or reduce a suspension and/or edit the suspension note.

If a follow up action has been edited, its edit history is displayed below the standard follow up box.

Follow up action steps:

- Incident Submitter adds a follow up action describing what action was taken in the moment
- Submitters may also add another follow up action recommending suspension
- Department or Library Manager adds a follow up action noting
  - Any further action to take locally
  - Recommendation of suspension
  - Or, marking it 'Reviewed' and then locking it to finalize the report
- To send a report for RD review and further action, email the appropriate RD with the incident information
- RD's will either add a further follow up action and Notify Deputy Director or lock the report as finalized
- Deputy Director will either lock the report as finalized or recommend suspension to the Executive Director
- If a system ban is created, the ban letter will be uploaded along with the suspension dates in the follow up actions. The incident will be locked to finalize it.

ATTACHMENTS TAB

You can add attachments to an Incident Report using the "Attachments" tab.

An attachment is any file you want to "attach" (or associate) with the Incident Report. You can upload image files from the library's surveillance cameras, or Word/PDF documents, like a Letter of Suspension for a specific perpetrator. Suspension letters will be uploaded for suspensions of 30 or more days. Videos will not be uploaded to the PITS system.

All attachments are automatically associated with the Incident Report. If you want to associate the attachment with a specific perpetrator, click the radio button beside the perpetrator's name. If there are no people listed here, it means that you forgot to click "Add Person" on the People tab.

Enter a brief description of the file in the "Description" box. Use the "Browse" button to locate the file to upload on your computer or network. Optionally, select a perpetrator to associate the file with. Then, click the "Upload" button to save your file into PITS.

If the perpetrator is already in the PITS database and already has some image files associated with them, a "Select Image" button displays beside the perpetrator's name.

Click the "Select Image" button to display a window showing each image file PITS has for that perpetrator. Beneath each existing image is a button allowing you to attach that existing image to this Incident Report. In this case, you are not actually uploading a file, but attaching an existing file to this Incident Report.

If you have a file to attach to the Incident Report but does not need to be associated with a specific perpetrator, do not check the radio buttons beside any of the listed perpetrators.

INCIDENT REPORT SIDEBAR

The Incident Report Sidebar is an overall view of the incident without having to click on each tab.

Scroll down through the sidebar panel to see a brief display of the information on each of the Incident Report tabs.

Each sidebar section corresponds to each of the tabs, so it offers a quick review of the entire incident report in one place.

The Incident ID is linked at the top of the sidebar, and it allows you to "reload" an Incident Report. This is usually not necessary, but can help you get back to a normal display if some of the pop-up windows are stuck.

SUBMIT INCIDENT REPORT

Click the "Submit" button to send email notifications to individuals and groups lists on the notifications tab. The email message indicates you have created a new Incident Report and includes a link to the Incident Report in PITS. Anyone who receives the email may click on the link, login to PITS and view the incident report.

If you check the "Copy Me on Notifications" box in your "My Preferences", you receive a copy of this email also.

If the location of the incident has a Supervisor, Manager, or Location Email associated with it, those email addresses are copied as well.

PRINT INCIDENT REPORT

To create a printable version of an Incident Report, click the "Print" button in the Incident Report Sidebar.

The "Print" button opens a new browser window with all information about the Incident Report displayed in an easily printable format.

Use your browser's "Print" feature to print the Incident Report or save as a pdf.

NOTE: Close the browser window after printing the report.

LOCK & UNLOCK INCIDENT REPORT

When an Incident Report is locked, no PITS user can alter the following elements:

- Date/Time
- Location
- Infractions
- Description
- People
- Support

Any user can add information on the Comments tab to a locked Incident Report.

Any Supervisor, Manager, Admin, or Ultimate Decider users can add Follow-up Actions to a locked Incident Report.

Any user can add attachments to a locked Incident Report.

Incident Reports may be locked (or unlocked) by users in the Supervisor, Manager, Admin, and Ultimate Decider user groups. Staff users cannot lock or unlock an Incident Report. Locking an Incident Report indicates it is finalized and needs no further action.

To lock an incident Report, click the "Lock" button at the top of the Incident Report Sidebar.

This button only displays if the logged in user is in a user group that has permission to lock Incident Reports.

Once you have locked an Incident Report, the lock button changes to an "Unlock" button.

The Date/Time/Location bar is displayed with a red border and background, and the message "THIS INCIDENT REPORT IS LOCKED" is displayed.

The locked status is also indicated on the Dashboard and the Browse Incidents pages, using color and the locked icon.

If it is discovered that other changes need to be made to the report, unlock the Incident Report by clicking the "Unlock" button. You will only be able to unlock a report if your user group has permission to do so.

VIEW INCIDENT REPORT HISTORY

Click the "History" button at the top of the Incident Report Sidebar to display a page that describes the process the Incident Report has gone through to get where it is.

Incident History includes any action that changes the incident report. History items include the Report's creation and its initial description, the adding, editing, or removal of people, the adding or removal of support calls, the adding of comments or follow ups, etc.

Incident History for Incident ID: 0000000097

Created: 07/07/2014 16:56 pm
Last Updated: 07/08/2014 09:18 am

Date	Time	Action	Status	User	Data?
07/07/2014	04:07 pm	Create Report	Incident 97 created.	Scott Stockton	REPORT CREATED View Report
07/07/2014	04:07 pm	Add Description to Incident 97	Updated Incident Description	Scott Stockton	INITIAL DESCRIPTION View Description
07/07/2014	04:07 pm	Update person record	updated person record for person id 78	Scott Stockton	PERPETRATOR UPDATE View Changes
07/07/2014	04:07 pm	Create person_description record	Added person_description record to incident 97	Scott Stockton	NEW PERSON DESCRIPTION View Person Description
07/08/2014	09:07 am	Add Comment	Added Comment	Scott Stockton	NEW COMMENT View Comment
07/08/2014	09:07 am	Update Report	Incident 97 saved.	Scott Stockton	REPORT UPDATED View Report
07/08/2014	09:07 am	Update Description of Incident 97	Updated Incident Description	Scott Stockton	DESCRIPTION CHANGED View Changes

Click on a "View" link in the Data column to display a pop-up window with the information that was added or changed.

Some of these links display special pop-up window that allows you to compare elements of the Incident Report before and after a change. For example, if the Incident Description has been updated, you can view the description from before and after the change.

FOLLOW AN INCIDENT REPORT

To "Follow" this incident, receive email notifications whenever the Incident Report is updated, click the "Follow Incident" link above the Incident Sidebar.

INCIDENT REPORT QUICK REFERENCE

1. Click Incident Report + to start entering a report.
2. Enter date, time, and location
3. Select the Infractions
4. Enter the Description of the incident
5. Click Save
6. Add People, existing or new, to the incident. Be sure to click **Add Person**.
7. Indicate if support was required for the incident
8. Enter follow up actions made in the moment and any recommendations for action.
9. Submit the report
10. Other staff involved in the incident will add Comments within the same report
11. Library and Department Managers enter any local follow up actions and either lock the report or email their supervisor for further recommended action. Be sure to include dates of any suspensions.
12. Library and Department Managers attach local warning and suspension letters, if necessary.
13. If creating a local suspension, then do the following in CARL.X when the library account is known:
    a. Enter local suspensions in as a **Soft Block Bounced Email Note** using the following format:
    security alert: local suspension at [location] for [X] months until [date] –[CX alias]
    b. Change status to *See Notes*
   c. Mark your calendar to remove the CX note when the suspension expires.

PITS DASHBOARD

The Dashboard is your starting point for most of the tasks you need to perform in PITS. It is divided into 3 sections -- The left menu of quick links, the content display area, and the PITS search form.
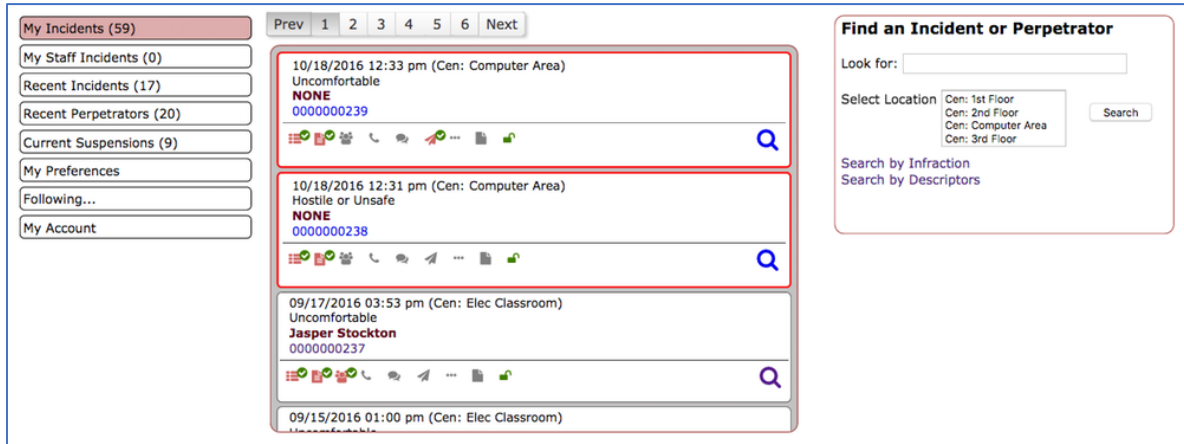
Menu of quick links:

- My Incidents
- My Staff Incidents*
- Recent Incidents
- Recent Perpetrators
- Current Suspensions
- Restricted Incidents*
- Restricted Perpetrators*
- My Preferences
- Following...
- My Account
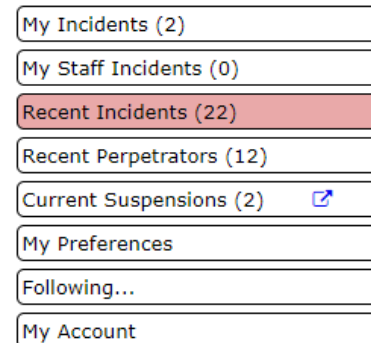
* Links displayed in the menu depends on permission level of logged in user.

If you are a Supervisor, Manager, Ultimate Decider, or Administrator user of PITS, you will have a menu item and panel for "My Staff Incidents". This is just like the "My Incidents" panel, but it only includes those Incident Reports entered by staff who report to you. The "My Incidents" panel will now only include your own Incident Reports. If you are a Staff user, you will not see this menu item.

To navigate through the various panels on the Dashboard, use the menu on the left side of the page to select a panel. The menu item that is in pink is the currently selected menu item.
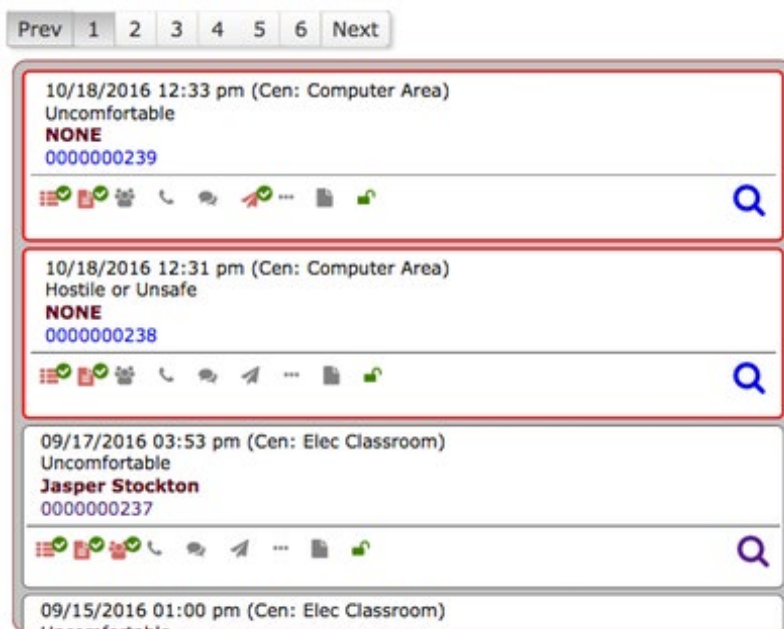
MY INCIDENTS

The "My Incidents" panel is a scrolling panel that lists any incidents that you have created within PITS.

The "My Staff Incidents" panel lists Incident Reports entered by any users who report to you. If your user is in the "Staff" group, you will not have this menu item.

If an incident is outlined in red, as the first one in the example above, it has occurred in the past 4 days. The red outline is an indication that it is a very recent incident.

If an incident has a bold black outline and a light red background, the incident is "locked". This is also indicated by the small locked lock icon.

Click the magnifying glass icon at the bottom right to view the incident report.

RECENT INCIDENTS

The "Recent Incident" panel lists all recent incidents. This panel includes Incident Reports created by any PITS user.

"Recent" is determined by a configuration setting that a user in the "Admin" group can change as necessary.

During development and testing, this has been set to 30 days. After release, this will be changed by the PITS Administrator as needed.

Again, the red outline indicates an incident that has occurred in the last 4 days, and a bold black outline with a pale red background indicates a "locked" incident.

Like the "My Incidents" panel, the magnifying glass icon will allow you to view details about the specific incident.

"Recent Incidents" is a scrolling panel, just like the "My Incidents" panel.

INCIDENT REPORT PROCESS ICONS

Tab	Unedited	Edited
Infractions	☰	☰✓
Description	📄	📄✓
People	👥	👥✓
Support	📞	📞✓
Comments	💬	💬✓
Notifications	✈	✈✓
Followup	...	...✓
Attachments	📄	📄✓
Lock Status	🔓	🔒

Each record in the "My Incidents" and "Recent Incidents" panels ends with a row of icons. These icons tell you what has happened with the report so far.

The first 8 icons each correspond to one of the Incident Report Tabs, and indicate which tabs have been edited.

The Lock icon indicates if the Incident Report has been locked or finalized.

RECENT PERPETRATORS

The "Recent Perpetrators" panel lists offenders that have been added in the last 30 days.

Like the previous panels, any offender that has been added to PITS in the last 4 days will be flagged with a red border.

Clicking on the Perpetrator's name will allow you to view more information about that specific perpetrator.

The Incident ID will also be linked, and clicking it will take you to the full Incident Report page where you can view details about the incident.

Like the previous panels, "Recent Perpetrators" is a scrolling panel.

Prev 1 2 Next

Bilbo Baggins
09/15/2016 12:59 pm
Oversize or inappropriate belongings, ...
0000000054

Unknown_19
09/15/2016 01:07 pm
Uncomfortable, ...
0000000097

Unknown_14
09/15/2016 01:06 pm
Oversize or inappropriate belongings, ...
0000000099

Unknown_16
09/15/2016 01:04 pm
Using another person's library card, ...
0000000111

Todd Tipsy
09/15/2016 01:01 pm
Uncomfortable, ...
0000000236
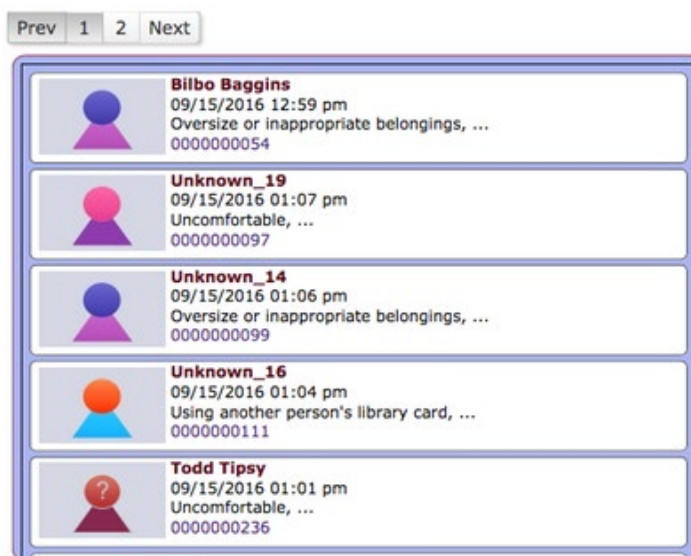
## CURRENT SUSPENSIONS

The "Current Suspensions" panel lists any patrons that are currently suspended from library access.

The dates of the suspension are included, along with the number of days remaining on the suspension.

"Current Suspensions" is a scrolling panel, so if there are more active suspensions, you may have to scroll down in the panel to see them.

The sorting drop-down allows you to sort Current Suspensions by "Time Remaining", "Start Date", "End Date", and "Person Name".

Additionally, you can click on the image to see a larger copy of the image on a Current Suspension record.
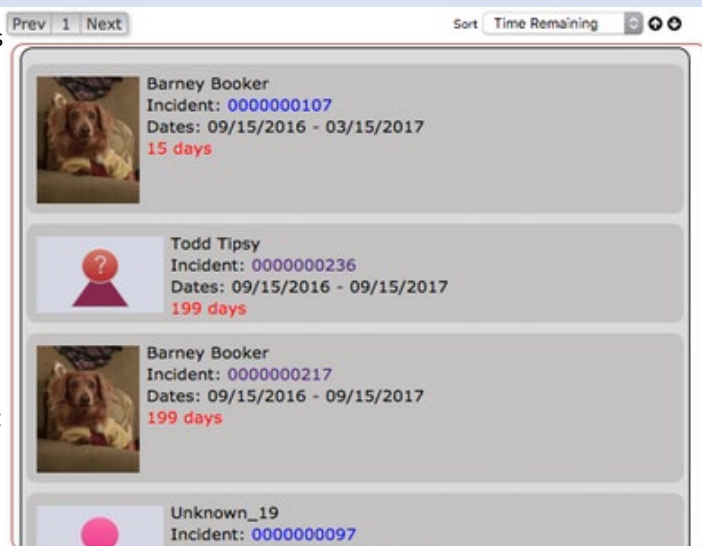

DASHBOARD: USER PREFERENCES

You can reach the "Preferences" page by clicking the "Preferences" submenu item on the PITS Dashboard.

Set your "Default Location" to the area you work in most often. If you are a staff member who works in multiple locations regularly, you can change this at the beginning of each shift in a new location.

The "Default Location" will be used when you are creating Incident Reports, so that you do not have to worry about setting the location when entering a new report.

Default Location	Downtown: Library ▼	Your default location for Incident Reports
Default Page	Dashboard ▼	Your landing page when you login
Dashboard: Default Panel	My Incidents ▼	The Dashboard Panel you want to see when you login
Dashboard: Items Per Page	20	Number of incidents, perpetrators, or suspensions to show per page on the Dashboard
Copy Me on Notifications	☐	If checked, you will be copied whenever you submit an Incident Report and notifications are sent.
		💾

You can set your "Default Page" to either the Dashboard or the Incident Report. The "Default Page" will determine what page you land on when logging into PITS.

If you find that you use PITS infrequently, and then mostly to create new Incident Reports, it will be more convenient to login directly to the Incident Report page.

If you find that you use PITS more frequently and are interested in keeping up with what happens to the Incident Reports you have entered, or use it to look for perpetrators to see what they have done in the past, if anything, you will probably want to keep this set to the Dashboard.

You can set your default Dashboard panel. When you login to PITS, this is the panel that will automatically display.

You can also set the number of items per page for the Dashboard panels. This setting will apply to the panels "My Incidents", "My Staff Incidents", "Recent Incidents", "Recent Perpetrators", and "Current Suspensions".

PITS sends out a number of notifications through email to various PITS users. For example, when you "Submit" an Incident Report, your supervisor and manager will be notified that the Report has been created.

By default, you will receive copies of these notifications on any Incident Reports you created. If you do not wish to receive these notifications, you can uncheck the "Receive a copy of all notifications about your incidents?" box.

When you have set your preferences, click the "Update" button to save the new settings.

DASHBOARD: FOLLOWING…

One of the features of PITS allows users to "Follow" an incident or a perpetrator. If you have the "Copy Me on Notifications" box checked in your preferences, you will automatically receive notifications about major changes to your Incident Reports. This includes things like a manager imposing a suspension on the offender.

However, if you want more details notifications about an Incident Report, you can "Follow" that Incident Report. You will then receive notifications when another user adds a comment, or when another user uploads an attachment for the Incident Report. Essentially, you will be notified of any and all changes to the Incident Report.

You start following an Incident Report by clicking a link on the Incident Report. See the section labeled "Follow an Incident Report" for more information about following an Incident Report.

You start following a perpetrator by clicking a "Follow Person" link on the Browse People page or the Perpetrator Details. See the section labeled "Follow Person" for more information about following a Person.
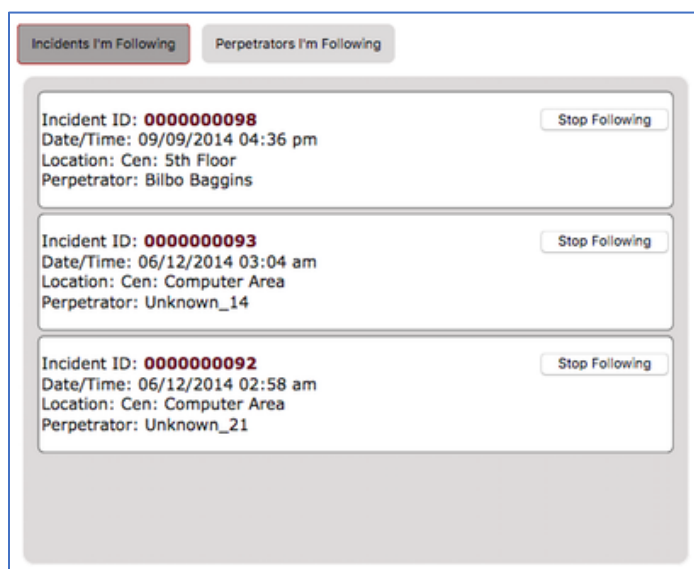
If you are following any Incident Reports or perpetrators, they will show up on your "Following…" page.

This page includes one row for each Incident Report you are following in the first table. It begins with the Incident Report's PITS ID and ends with a button that allows you to stop following the incident.

Click the "Stop Following" button on an Incident Report's row to stop following that Report.

Use the buttons at the top to switch between Incidents you are following and Perpetrators you are following.

The second table lists any perpetrators you are following. Click the "Stop Following" button on a perpetrator's row to stop following that perpetrator.

The My Account page, linked from the Dashboard sub menu, allows you to change your PITS password.

To change your password, enter the new password into each of the two Password boxes, and click the "Change Password" button.

If your passwords do not match, or PITS cannot change your password, this page will display a message indicating what type of failure occurred.

If the password change is successful, it will display a message indicating that the password has been changed.

Username: **scott**
Full Name: **Scott Stockton**
My Email: **scott@quipugroup.com**
My Default Location: **Cen: Computer Area**
My Supervisor: **Scott Manager**
My Manager: **Scott Manager**

New Password:	••••••
Retype Password:	

SEARCHING PITS

You can search the information in PITS using one of the options in the "Find an Incident or Perpetrator" panel.

The keyword and location searches include perpetrators. Entering text and/or selecting locations will find all perpetrators with those words or those locations.

After searching, the Search Form will include two buttons indicating the number of Incidents and Perpetrators found.

If the search found either Incidents or Perpetrators, you can click the appropriate button to view the search results.

Alternate Searches include the "Search by Infraction" and "Search by Descriptor" searches.

The "Search by Infraction" option allows you to search PITS Incident Reports by matching the infractions that were committed during an incident.

The "Search by Descriptors" option allows you to search PITS perpetrators by the description of the individual.

SEARCH BY KEYWORD AND LOCATION

The text box performs a keyword search against all textual data stored in PITS. If you enter more than one word in the search box, PITS will search for each of those words in each of the text fields in the database.

For example, entering the single word "banana" would find incidents where the description or other text fields contained any of the phrase "eating a banana", "waving a banana", and "throwing a banana". Entering the phrase "eating a banana" would only match incidents with any of the words "eating" or "banana", and would match those with "waving a banana" or "throwing a banana" as well as those with the phrase "eating a banana" if an ANY search is used. The same phrase would match only incidents with both "eating" and "banana" if the All search is used.

The "Look for:" box allows both word and numeric searches. For example, you can search for "consuming alcohol" to find Incidents or Perpetrators where "consuming" or "alcohol" is part of the Incident Description, or where a person is associated with such an incident.

If you enter a number, such as "238", PITS will search for any Incident Report with the ID "238" and for any Perpetrators where their person ID or library card number is "238".

If you enter both text and a number, the number will be treated as part of the text and searched as if the number were a word in the description.

The "Select Location" drop-down allows you to view incidents that occurred in one or more specific places. You may select multiple locations in this drop-down. You can also filter the results to a location or locations after the search.

"Select Location" can be combined with the keyword search, and both will return a list of Incident Reports matching both criteria.

NOTE: a brief stop-word list is used for the keyword search, and it will not search for words like "a", "an", "the", and so on.

SEARCH BY INFRACTION

On arrival, the "Search by Infraction" page displays a list of top level infraction categories and two buttons to control whether the search includes only those incidents matching ALL of the selected infractions (an "and" search), or includes the broader set of those incidents matching ANY of the selected infractions (an "or" search).

Once you select one of the top-level infraction categories you will see an expanded list of more specific infractions to include in your search.

Clicking either button will produce a list of PITS Incident Reports that match the selected infractions.

SEARCH BY DESCRIPTORS

When a perpetrator is entered, the user has the opportunity to describe the person using specific "descriptors". Descriptors include identifying information such as height, weight, race, and gender.

The "Search By Descriptors" page allows you to search for perpetrators that match specific descriptors.

Each descriptor has a small box with a range of choices. Click on the text or the checkbox button of the descriptor settings you want to search for. You may select multiple values for each descriptor.

For example, if you remember that a perpetrator was a very tall Caucasian male, click the "over 6 feet" option for the "Height" descriptor, the "Caucasian" option for the for the "Race" descriptor, and the "Male" option for the "Gender" descriptor.

The two search buttons allow you to search for ALL the selected descriptors (an "and" search) or ANY of the selected descriptors (an "or" search). Using either button to perform the search will display a list of perpetrators that match the selected descriptors.

BROWSE INCIDENTS

The Browse Incidents page allows you to quickly browse and find specific Incident Reports. It also allows you to review most of the details associated with any Incident Report.

BROWSE INCIDENTS PAGINATION & PAGE NAVIGATION

The Browse Incidents display is divided into several pages. The number of pages depends on the number of Incident Reports and an Admin setting that determines how many items to show on each page. The default for the Admin setting is 10 items per page.

At the top of each page of the Browse Incidents display a page navigation menu displays like the one in the image.
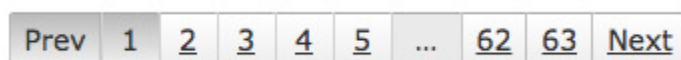
If you have enough Incident Reports, the page navigation will include one or more "..." buttons. Click on the "..." to enter a page number to display.

This allows you to quickly jump to a particular page or a page you believe is near the page with the Incident Report you are looking for.

FILTER INCIDENTS

You can filter incidents by location, status, or support using the filters on the left side of the page.

Click the down arrow beside a filter type to see all the choices for that filter.

The Location filter includes a list of all your PITS locations, allowing you to restrict the list of Incident Reports to one or more locations.

The Status filter includes "Created", "Updated", "Submitted", and "Locked".
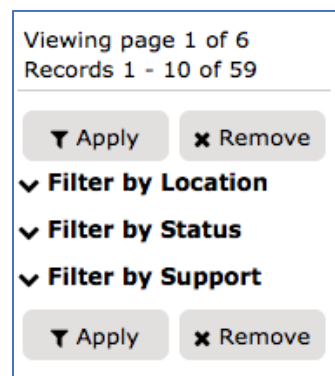
The Support filter includes each of the types of support offered for an Incident Report. This includes "Other Staff", "Guard", "Police", "EMT", and "Fire Dept.". This allows you to quickly find all incidents when a guard was called, or when police where called.

To use a filter, expand the filter, select each filter item that you want, then click the "Apply" button.
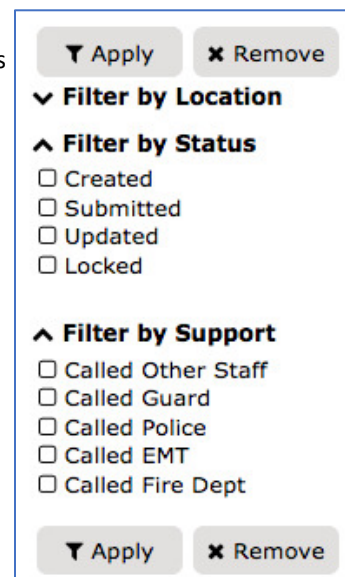
When you click the "Apply" button, PITS creates a new list of incidents to browse, and displays the first page of the new set.

If you want to remove all current filters, click one of the "Remove" buttons, and PITS returns to the first page of the full set of Incident Reports.

| Viewing page 1 of 1 |
| Records 1 - 5 of 5 |

▼ Apply   ✖ Remove

∧ **Filter by Location**
☐ Cen: 1st Floor
☐ Cen: 2nd Floor
☐ Cen: Computer Area
☐ Cen: 3rd Floor
☐ Cen: CMR
☐ Cen: Elec Classroom
☐ Cen: 4th Floor
☐ Cen: 5th Floor
☐ Claremont
■ North
■ North: Outside
■ North: Men's Restroom
☐ South
☐ Tool Lending
☐ West

∨ **Filter by Status**

∨ **Filter by Support**

▼ Apply   ✖ Remove

BRIEF INCIDENT REPORT RECORD

In "Browse Incidents", each incident report brief record displays three columns. The first column contains basic information about the Incident Report, like the Incident Report ID, date, time and location. It also includes whether any outside support was called, like police, emergency medical techs, or fire dept.

In each brief record, the PITS Incident Report ID is linked and takes you to the full Incident Report page where you can view all the details about the event.

The first column also includes the incident's Process Status Icons to indicate which tabs of the incident report have been filled in. Finally, the first column also contains a button to either follow an incident or to stop following an incident.

0000000112	≣ **Infractions**	**Infractions**
01/16/2015 02:09 pm	📄 Description	
Cen: 2nd Floor	👤 Perpetrators (1)	• Hostile or Unsafe
Reported by: Scott Stockton	👁 Witnesses (1)	○ Interferes with any person's comfort or safety
Status: Submitted	💬 Comments	○ Oversize or inappropriate belongings
Police Called: No	✈ Submissions	
EMT Called: No	⋯ Followups	
Fire Dept Called: No	📄 Attachments	
	≈ Find Similar	

Follow Incident

The second column contains the record options that allow you to view different parts of the incident report. Links will only show up in this column for existing elements of an incident. For example, if no support was called for the incident, a "Support" button is not displayed.

The one exception to this rule is the data associated with the "People" tab on an incident. In the Brief Record display, people are split into "Perpetrators", "Victims", and "Witnesses" to better indicate the type of people associated with the incident.

BROWSE INCIDENTS: RECORD OPTIONS

The third column displays the information associated with the selected record option. The default view is the "Infractions", as in the sample record above.

Description

During my shift in the computer area, Mr Baggins entered the area and asked to use a computer. He was assigned computer #4 and sat down and began to work. As he sat down, I offered to take his walking stick and backpack and place them behind the service desk. At first he refused, but when I informed him that the walking stick was considered a weapon, and that he could not keep it with him while in the library. He allowed me to take the walking stick, but kept his backpack. He then began playing a computer game. Within a few minutes, he was beginning to grumble and complain loudly, interrupting the other users in the computer area. Marion, who was also working in the computer area that day, asked him to calm down, but he continued to get more agitated, screaming "But that's not how it happened! They got it all wrong!". We (Marion and I)

Select the "Description" option to display the description of the incident in the third column.

Perpetrators

Matilda
Unknown
Currently Suspended: No
Patron Data Restricted: No

Snickers
Unknown
Currently Suspended: Yes
Patron Data Restricted: No

Select the "Perpetrators" option to display the perpetrators associated with the incident in the third column.

Select the "Follow ups" option to display the follow ups associated with the incident in the third column.

Followups

Action: Trespassed for 6 months

Perpetrator: Snickers

Suspension: Y
  Start Date: 2019-02-26
  End Date: 2019-08-26

Imposed By: Carol Gyger *on* 2019-02-26

Followup Note: this is a long trespass

BROWSE PEOPLE

The Browse People page displays a list of all persons in the PITS database. This includes perpetrators, victims, and witnesses.

BROWSE PEOPLE PAGINATION & PAGE NAVIGATION

At the top of each page of the Browse People display is a page navigation menu like the one in the image.

If you have enough Perpetrators, the page navigation will include one or more "..." buttons. Click on the "..." to enter a page number to display.

This allows you to quickly jump to a particular page or a page you believe is near the page with the Perpetrator you are looking for.

BROWSING PERPETRATORS, VICTIMS, OR WITNESSES

When you first arrive at the Browse People page, you will be browsing a list of Perpetrators in alphabetical order by first name.

There is be a button at the top right of the Browse People page that allows you to change lists.
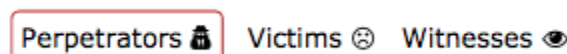
Click the "Victims" or "Witnesses" buttons to change to the desired list. The current list has a red border around the button.

FILTER THE BROWSE PEOPLE LIST

You can filter Perpetrators by any descriptor using the filters on the left side of the page.

Click the down arrow beside a filter to see all the choices for that filter.
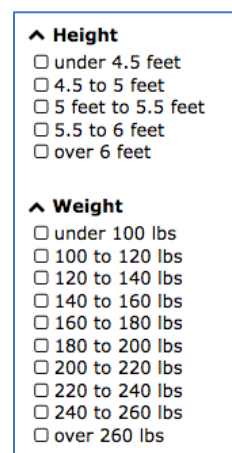
To use a filter, expand the filter, select each filter item that you want, then click either of the "Apply" buttons above or below the filters.

When you click the "Apply" button, PITS displays a new list of perpetrators to browse.

If you want to remove all current filters, click one of the "Remove" buttons, and PITS returns to the first page of the full set of Perpetrators.

PERPETRATOR RECORD

The first column of each perpetrator record includes the perpetrator's name, the date they were added to PITS, and whether they are currently suspended, library card number, and date of birth.

The Perpetrator's name is a link that will take you to the Perpetrator Details page.

If there is an image associated with the perpetrator, a small thumbnail image is displayed below the perpetrator data. If there is no image, a placeholder image is displayed.

The second column holds the perpetrator stats and record "option" links. This option list includes:

- Incidents: the number of incidents the perpetrator has been involved in.
- Suspensions: the number of suspensions the perpetrator has received.
- Other Follow ups: the number of follow up actions that are NOT suspensions the perpetrator has received.
- Images: the number of images for the perpetrator.
- Documents: the number of document attachments for the perpetrator.
- Most Recent Description: the most recent list of descriptors assigned to the perpetrator.
- Contact Info: name, card number, date of birth, address, email, phone.
- Aliases/Cards: name aliases, additional card numbers.
- Comments: person comments.
- Compare/Merge: see Merge Perpetrators.

Click on any of the record options to display that information in the third column. By default, the list of incidents involving the perpetrator are listed.

The third column of the perpetrator record is a scrolling box with a list of items based on the selected option.

Suspensions:

Other Follow ups:

Followup Type: **Verbal warning**
Date of Action: **10/10/2016 03:49 pm**
Incident ID: **0000000218**
Action is Suspension: **N**

Images:

Filename: ZebOnCouch.jpg
PITS Filename: PFI_1462463876.jpg
Date: 2016-05-05 08:57:56
Description: Another test image

Filename: PITS_Person4.jpg
PITS Filename: PFI_1461270655.jpg
Date: 2016-04-21 13:30:55

Documents:

Filename: **testfile1.docx**
PITS Filename: **PFD_1431564888.docx**
Date: **12/31/1969**
Description: **Barney Booker: Letter of Suspension**

Most Recent Description:

Date: **04/21/2016**   Incident: **0000000218**

Description: **Mr. Booker is very short, brown haired, and some days has four legs**
Height: **5.5 to 6 feet**
Weight: **200 to 220 lbs**
Race: **African American**
Gender: **Male**
Age: **55 - 60**

Contact Info:

Name: **Barney Booker**
Library Card: **Unknown**
Date of Birth: **09/15/2010**
Address 1: **1234 5th Ave.**
Address 2: **Apt #678**
City: **Denver**
State: **CO**
Zip: **80224**
Phone: **321-432-5678**
Alternate Phone:
Email: **barney@nomail.com**
Alternate Email: **booker@nomail.com**

Aliases/Cards:

Aliases
BB
Zeb

Cards
29096403971

Comments:

Barney is usually a very well behaved customer.

By Carol Gyger (12/11/2018 04:06 pm)

Brief records for victims and witnesses are very minimal and include a link to the incident they are associated with.

VICTIM RECORDS

Name: **Jiminy Cricket**
Phone: **201-555-1212**
Email: **j.cricket@fictionalworld.com**

Incident

0000000215

Address1: **221 Black Rock Rd**
Address2: **#431**
City:
State: **CA**
Zip: **67890**
Alternate Phone: **201-555-1414**
Alternate Email:

The second column displays contact information.

WITNESS RECORDS

Name: **Albert Angstly**
Phone: **504-555-1212**
Email: **aangstly@mybusiness.com**

Incident

0000000215

Address1: **95 W. 75th Ave.**
Address2:
City:
State: **CA**
Zip: **65432**
Alternate Phone: **503-555-1212**
Alternate Email:

The second column displays contact information.

PERPETRATOR DETAILS

The Perpetrator Details page includes all information about the perpetrator and links to associated Incident Reports.

The Perpetrator Details page includes the perpetrator's name, library card number (if known), date perpetrator was first added to PITS, date perpetrator was last updated, and other perpetrator fields.

The lower section of the Perpetrator Details page includes Incident History, Follow up History, Images, Documents, Comments, and Description History.

NOTE: The fields, buttons and other functions on this page are determined by your site settings and user group permissions.

EDIT PERSON, ALIAS, CARD FIELDS

To edit perpetrator fields in the center box, click the edit text icon and edit the fields, as desired.

ACTION BUTTONS

The following action buttons are available on the Perpetrator Details page.

FOLLOW PERSON

One of the features of PITS allows users to "Follow" a perpetrator.

To "Follow" a perpetrator click the "Follow Person" button on the Perpetrator Details or Browse People page.

When you "Follow" a perpetrator, they will display on your Dashboard > "Following..." page.

NOTE: For more information on following perpetrators, go to the Dashboard: Following topic.

RESTRICT PERSON

MLS is not currently using the "Restrict" feature of the software.

NEW INCIDENT

When you click the "New Incident" button on the Perpetrator Details page or the Browse People page, a new incident report form displays. After starting a new Incident Report from one of these buttons, clicking "Save" will automatically add the perpetrator to the incident report.

NEW COMMENT

Person Comments are collected and displayed on the Perpetrator Details page and on the People tab of the Incident Report. Users with appropriate permissions can add, edit, or delete Person Comments. These comments are not associated with a specific incident, but remain connected to the perpetrator throughout PITS.

To add a Person Comment, click the "New Comment" button and fill out the form.

The Comment appears in the Comments section on the Perpetrator Details page.
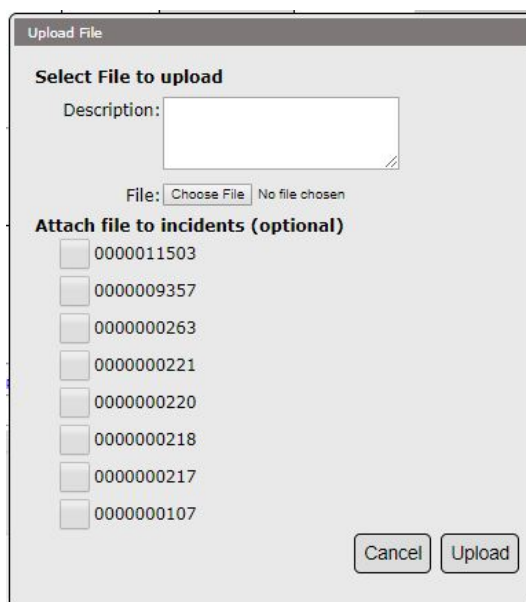
To edit or delete a Comment click on the edit text icon or "X" icon in the Comments section.

UPLOAD FILE
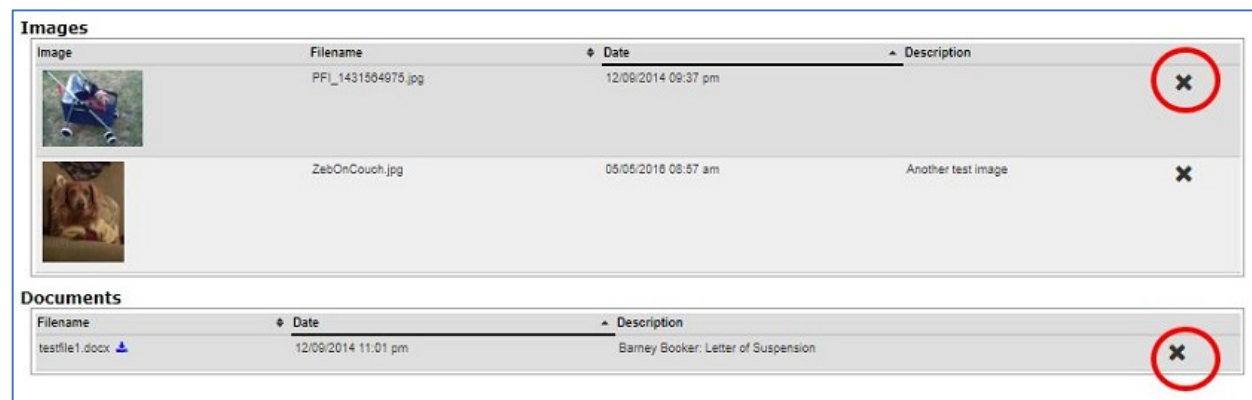
To upload an image or document file to the perpetrator's record, click the Upload File button.

- **Image file:** When you upload an image file it displays in the Images section on the Perpetrator Details page and as an image of the Perpetrator.
- **Document file:** When you upload a document file it displays in the Documents section on the Perpetrator Details page.

To delete an image or document click on the "X" icon in the Images or Documents section.

DELETE PERSON

Use the "Delete Person" button to delete a perpetrator record, remove the perpetrator from associated incident reports and delete the associated incident reports.

NOTE: Incident reports with additional perpetrators will NOT be deleted. However, if the perpetrator you are deleting is the ONLY perpetrator on an incident report, that incident report WILL be deleted.

To delete a perpetrator from an incident report but not the incident report itself, go to the incident report, People tab, Existing Perpetrators and click on the Remove button.

INCIDENT HISTORY AND FOLLOW UP HISTORY

The perpetrator's incident and follow up histories display on the Perpetrator Details page.

Click on the incident report number to display the Incident Report tabbed view.

Click on the column heading to sort by that column. For example, to sort by date, click on the Date column heading.

DESCRIPTION HISTORY

For each incident involving the perpetrator, the perpetrator description is recorded on the Perpetrator Details page.

Click on the incident report number to display the Incident Report tabbed view associated with this description.

Click on the column heading to sort by that column. For example, to sort by date, click on the Date column heading.

Click on the edit text icon to edit the descriptors for the associated incident report.

Description History

Incident ID	Date	Height	Weight	Race	Gender	Age	Hair Length	Hair Color	Eye Color	Skin Color	Description	
0000011503	12/12/2018 10:10 am	5.5 to 6 feet	200 to 220 lbs	African American	Male	55 - 60	Short	Gray	brown	#785c51	Mr. Booker is very short, brown haired, and some days has four legs	✎
0000009357	02/14/2018 01:40 pm	5.5 to 6 feet	200 to 220 lbs	African American	Male	55 - 60	Short	Gray	brown	#785c51	Mr. Booker is very short, brown haired, and some days has four legs	✎
0000000263	02/10/2017 02:28 pm	5.5 to 6 feet	200 to 220 lbs	African American	Male	55 - 60	Short	Gray	brown	#785c51	Mr. Booker is very short, brown haired, and some days has four legs	✎
0000000221	04/13/2016 03:28 pm	5.5 to 6 feet	200 to 220 lbs	African American	Male	60 - 65	Short	Gray	brown	#785c51	Tall african-american man with grey hair. 6 feet tall and approximately 220 lbs.	✎
0000000220	04/12/2016 01:23 pm	5.5 to 6 feet	200 to 220 lbs	African American	Male	60 - 65	N/A	Gray	brown	#785c51	Tall african-american man with grey hair. 6 feet tall and approximately 220 lbs.	✎
0000000218	03/17/2016 02:16 pm	5.5 to 6 feet	200 to 220 lbs	African American	Male	55 - 60	Short	Gray	brown	#785c51	Mr. Booker is very short, brown haired, and some days has four legs	✎
0000000217	10/04/2015 11:53 am	5.5 to 6 feet	200 to 220 lbs	African American	Male	55 - 60	Short	Gray	brown	#785c51		✎
0000000107	01/06/2015 12:59 pm	5.5 to 6 feet	200 to 220 lbs	African American	Male	60 - 65	Short	Gray	brown	#785c51	Tall african-american man with grey hair. 6 feet tall and approximately 220 lbs.	✎