How Case Folder Contacts Work

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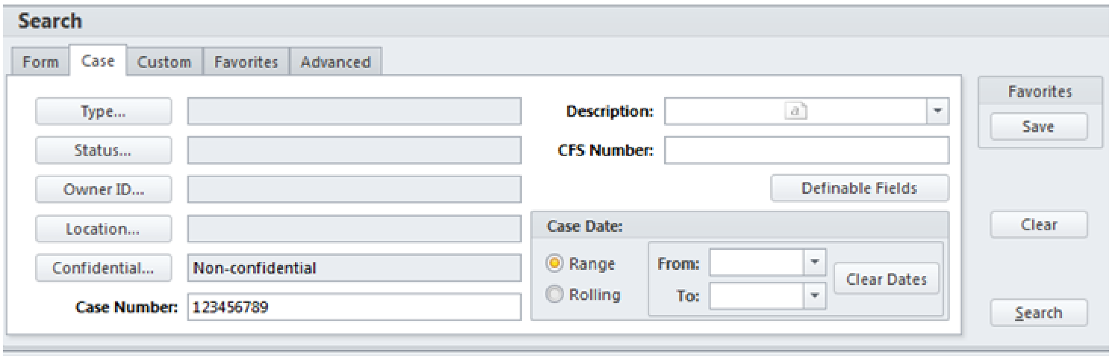
TraCS is designed around the concept of a case, which is defined as an incident for which an officer is called to perform an official act (write a citation, investigate a crime, etc.).

A case can have many scenarios and can involve one or more of the electronic forms designed for the TraCS software. Cases are the primary components of TraCS. Before data can be entered into a form, a case must be opened. A case is represented in TraCS as a file folder, with each electronic form in that case represented as a piece of paper in the file folder. For law enforcement users, an incident or contact typically represents a case folder. Contacts are sometimes also referred to as folders in certain "under the hood" naming conventions in TraCS. The terms Case, Folder and Contact can be used interchangeably. For simplicity, this FAQ will use the term case.

- Contact was the term used in version 7.3 and carried over to version 10.
- Folder is mainly used behind the scenes and was sporadically found in the forms manager.
- Case is the new term that was added when the new case management features were added to TraCS in 2015.

Police Number Equals Case Number

The Police Number field is the unique number law enforcement agencies assign to an incident. Once added to the form, the Police number, will change the Case Number and any new form added to that Case will automatically be assigned the case number and update the police number accordingly. This insures all forms in the case are linked via both the police number and case number. This makes searching for the Case and all the forms associated with the incident easily found. In the search dialog, typing in the Case/Police/Incident number into the Case Number field on the case Tab will find all associated forms.



Case Number Issues on Mobile Computers

TraCS assumes the Case Number assigned via the police number is unique to the incident.

It is a bad practice to link forms from unrelated incidents to the same case/police number. If you need to track forms from unrelated incidents together, consider using the Tags field or the Agency Comment field for this purpose. An example might be tracking forms generated out of enforcement initiative.

Using the case/police number field to link forms from unrelated incidents may cause issues when uploading forms (web services client) or end-shifting forms (standard mobile computers.) When processing these forms into the office database, TraCS uses the case number to determine whether the forms are part of the same incident.

- If TraCS finds an identical case number in the database already, TraCS will add the form to that existing case, even if the form was not intended to be associated with that incident.
- The owner of the first form in the database is also the owner of the case folder.If forms owned by other officers are in the same case folder, those other officers may not have access to the forms they created because they do not also have access to the case folder.See user access levels below for information on the ViewOnly access level.

Case Number Issues on Office Workstation Computers

On office workstation computers, adding a new form by clicking the 

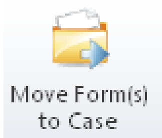
New Case button using the quick add menu, creates an entirely new case unrelated to any other case in the database, **even if you use the same police number**.

To link a new form to an existing case, you must create the new forms using one of the following methods:

- Open a form in the case prior creating a new one and add the new form using the quick add menu in the form viewer. Or,
- Select a form in the case in the form manager grid and click the 

Add New or 

Replicate button.
- Never use the Quick add in the forms manager if want the new form to be part of an existing case.

If you happen to accidently create to case folder with the same case number you can merge the forms from one case to another using the 

Move Form(s) to Case button in the Records Management ribbon.

Multi Jurisdiction Agencies

If you host multiple jurisdictions in a single TraCS database, basic settings in TraCS do not insure uniqueness for case numbers. If two agencies use the same case number, forms from each jurisdiction may be unintentionally merged into the same case. There is a new setting available in TraCS baseline 10.06.49 or better to address this. Currently this setting is off by default. This setting will be added to a future TraCS pack. Until then, if you host multiple jurisdictions in the same database, contact the Badger TraCS help desk for assistance in enabling the "perlocation" setting.

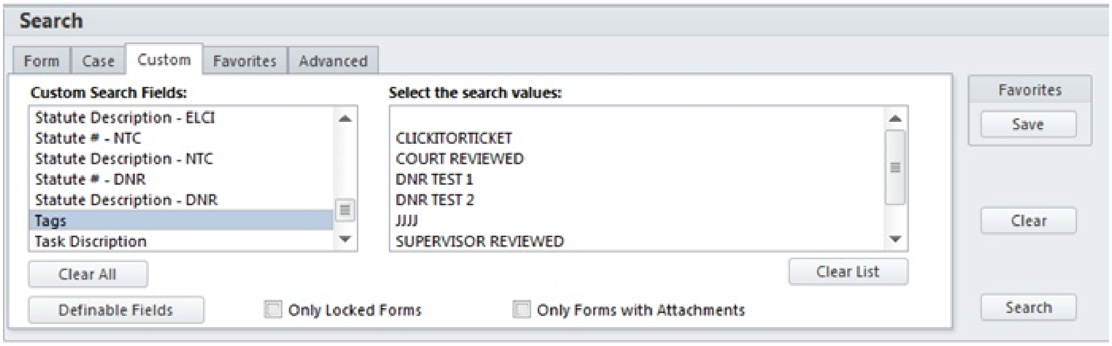
User Access Levels

You may want officers to be able to see each other's forms and cases, especially when multiple officers are working the same incident. If so, the officers need the ViewOnly access level for associated users or user groups. This is covered in tasks 3-18 and 3-19.

Tags

Do not use the case/police number for tying forms from unrelated incidents together. Instead, use tags.

- Set up tag(s) for the form or forms. (Task 3-5 in the installation guide)Be sure to run a new distribution on the field units to update the tag table on the mobile computers.
- The officer will then select one or more tags from the drop down list in the tag field. Tags field is next to the Police Number at the top of every form.
- In the office, use the Custom Tab in the Search Box to search for various tags, or run one of the “Tag” reports on the Records Management ribbon menu under the Violation menu, or create an ad hoc query.



More TraCS FAQs Here:
http://wisconsindot.gov/Pages/safety/enforcement/agencies/tracs/faqs.aspx

—GLP 4/8/2016