



LTClient User Guide

Lock&TrackSM

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TABLE OF CONTENTS

LET'S GET STARTED...	2
How to Login	2
Passwords	3
LOCK&TRACK CONVENTIONS	3
Windows Conventions	3
Desktop Conventions	4
Main Menu	4
Navigation Buttons	6
ACCURATE DATA ENTRY	6
Validation Lists	6
Dates and Times	7
Memo Fields	7
Message and Status Line	8
On-Line Help	9
LOGGING OUT	9
Locking and Unlocking the Application	9
WORKING WITH RECORDS	10
Retrieving and Viewing Records	10
Performing Searches	12
Wildcard Searching	13
Soundex Searches	13
Query Based Searches	13
RECORDS MANAGEMENT	14
Adding a Record	14
To Clone a Record	15
Updating a Record	15
To Delete a Record	16
Reports	16
APPENDIX : THE TOOLBAR	20

Lock&Track Overview

Welcome to the **Lock&TrackSM Corrections Information System**. **Lock&Track** is an easy-to-use inmate and jail management application package for corrections staff and administrators, as well as law enforcement personnel. It provides instant access to inmate and offender information, intake, incarceration, and release and post-release activities.

Lock&Track uses Windows commands, conventions and controls throughout, such as tabbing to move to the next field, short-cut or hot keys, a toolbar, title-bar buttons and drop-down menus. **Lock&Track** presents information as application *desktops*, each of which focuses on a particular aspect of a correctional duty or job. Each desktop contains menus and screens for data entry, modification and review, and production of reports.

If you can work in a Windows environment, you can easily and quickly learn how to operate **L&T**.

LET'S GET STARTED...

HOW TO LOGIN

To start, double click on the **LTClient icon** or choose LTClient from your application menu



to display the login window:

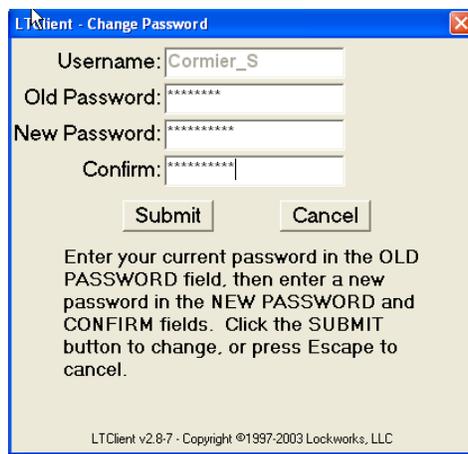
- **Host:** this is the server you wish to connect to. For Lock&Track Online the value is lto.locktrack.com . Other customers should request this value from IT or LockWorks staff.
- **Desktop:** the application you wish to use. We will demonstrate the LT application.
- **Username:** Generally LASTNAME_INITIAL : WILLSON_S Created by LockWorks or IT staff for you.

- **Password:** The first time you use LockWorks, your password will be NEWUSER. You will be asked to change this before proceeding. **Do not lose your new password.**

PASSWORDS

Your password must be at least six characters long and composed of the letters A through Z, the digits 0 through 9 and/or the special characters \$ (dollar sign) and _ (underscore). Your password cannot be a word in a dictionary. We suggest thinking of a phrase you will not forget and using the first letter of each word,. For example the book title *The Sheriff's Guide To Corrections Facility Discipline* becomes TSGTCFD. Use your imagination, but make the password one that you will remember. Note: **Username** and **Password** are *not* case-sensitive; you can enter these using UPPER- or lower-case letters, or any combination.

Once you've entered your password and confirmed it, as shown below, click the **Submit** button (or press **Enter**) to run the desktop you've selected.



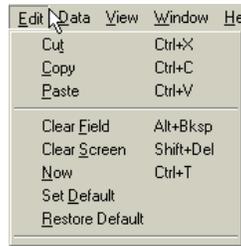
Enter your current password in the OLD PASSWORD field, then enter a new password in the NEW PASSWORD and CONFIRM fields. Click the SUBMIT button to change, or press Escape to cancel.

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LOCK&TRACK CONVENTIONS

WINDOWS CONVENTIONS

L&T screens use standard Windows methods for accomplishing any task at hand. Click in a data field (box) and type to enter information. Tabbing moves you to the next logical field. Some fields include drop-down lists, which aid accurate consistent data-input. Context-sensitive tips appear if you hover over a field. Toolbars and drop-down menus include standard Windows functions. For example, the Edit menu should look familiar:



The concept of the toolbar should also be familiar to Windows users. The specific functions are outlined in the Appendix.



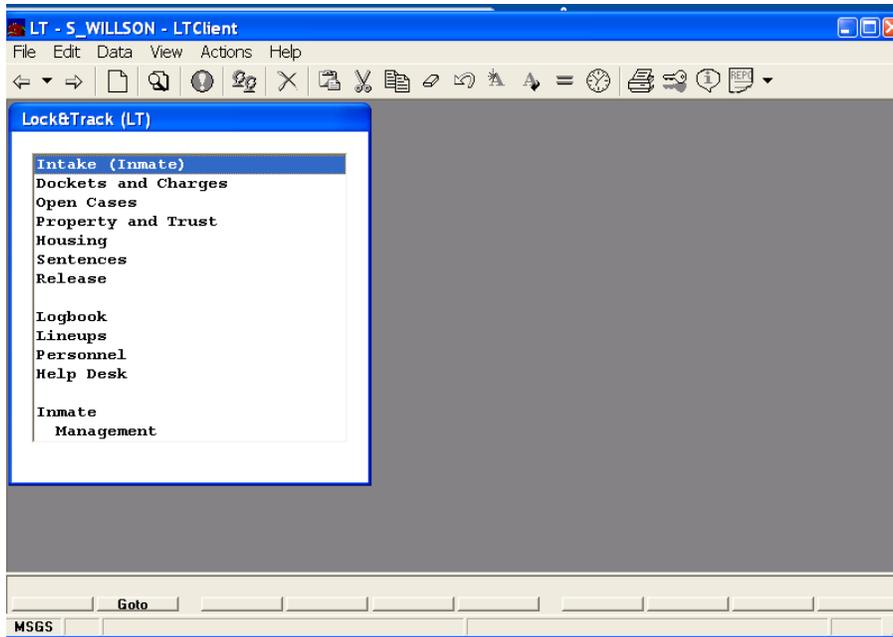
DESKTOP CONVENTIONS

Required fields are highlighted with a colored background. Errors in data entry, such as entering a date in the wrong format cause the background to change. The default colors are blue for required fields and yellow for errors, but these background colors can be changed to fit your personal preference. Dropdown menus and many buttons include keyboard command tips to speed tasks as you become familiar with the software. A help menu provides access to additional supporting materials.

MAIN MENU

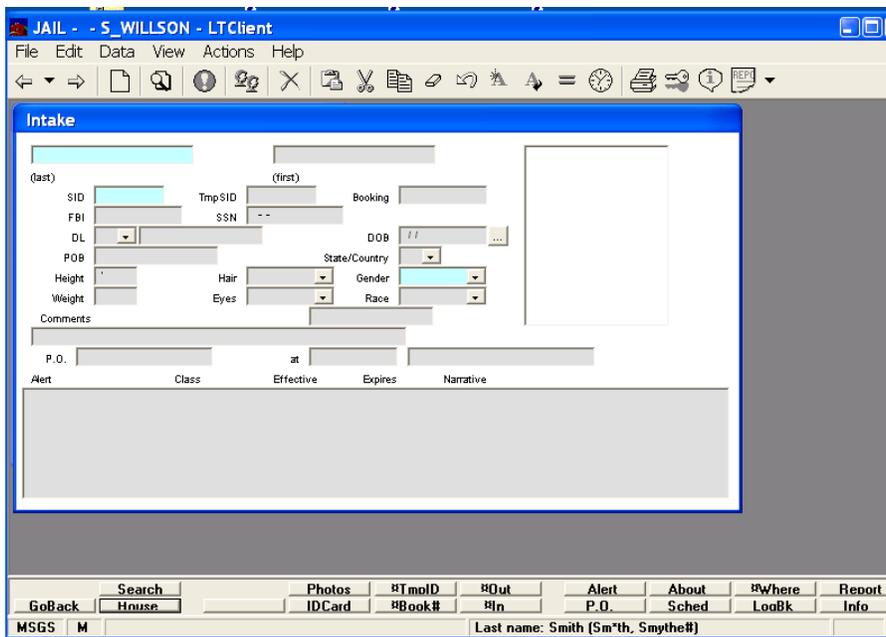
For purposes of illustration in this User's Guide, examples of the **Lock&Track Jail** desktop will be shown. Although you may be using a different **L&T** desktop, all desktops follow similar operational principles.

Once logged in, the **JAIL** desktop presents a **Main Menu** featuring correctional functions listed in a logical order.



We will demonstrate the Intake function, as it is one of the most commonly used, but first we want to cover some of the basic functionality common across desktops.

To choose an item in a menu double-click the item, or highlight it and choose “GoTo” or click the right arrow in the button-bar. A message may appear below the “GoTo” text to indicate an action is in progress if your network requires a moment to complete your request. The Intake Screen appears with context-sensitive navigation:

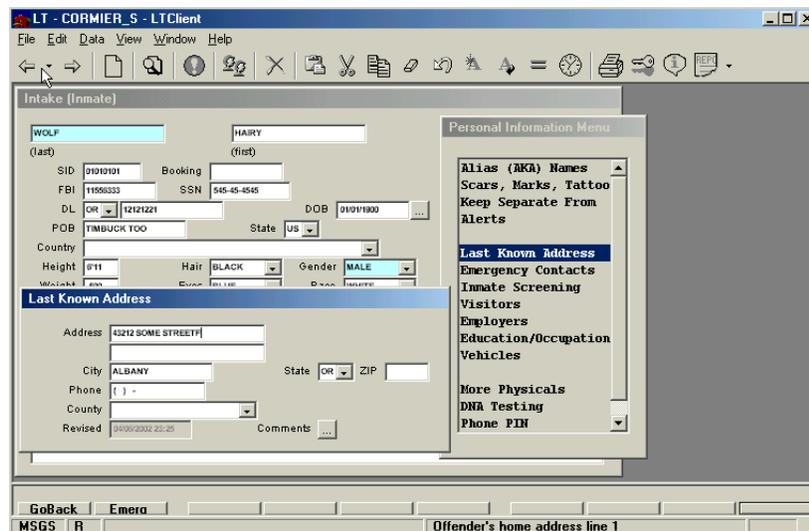


NAVIGATION BUTTONS

Lock&Track also has **Navigation** buttons to help you maneuver through the screens, and **Function** buttons which perform an operation. These buttons are found under the application screens and are context sensitive, changing as you move through the software. Function options are indicated with a **⌘** symbol. Tool tips indicate keyboard equivalent.



For example the **⌘Where** button calculates the current location of the offender, while the **Info** button navigates to a new menu with additional options. Note that some functions and some navigation options will not work without a current record loaded. From the sub-menu **Info**, double-clicking the menu item **Last Known Address** will display a screen listing that address, as shown below.



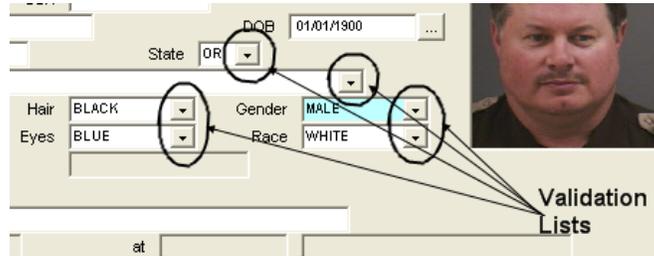
Note that screens can be layered on top of each other. To remove the top screen from your desktop, click the **GoBack** navigation button, or the left pointing arrow at the top of the window.

ACCURATE DATA ENTRY

VALIDATION LISTS

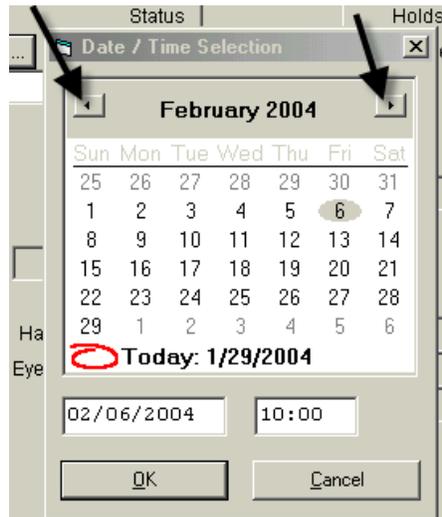
Validation lists simplify accurate data entry for fields with limited numbers of valid entries. For example, the drop-down list for **State** includes the 50 states in the U.S. If you try to

enter a value into a validation list field which is *not* a member of that list, that value is rejected. These lists can be customized by installation.



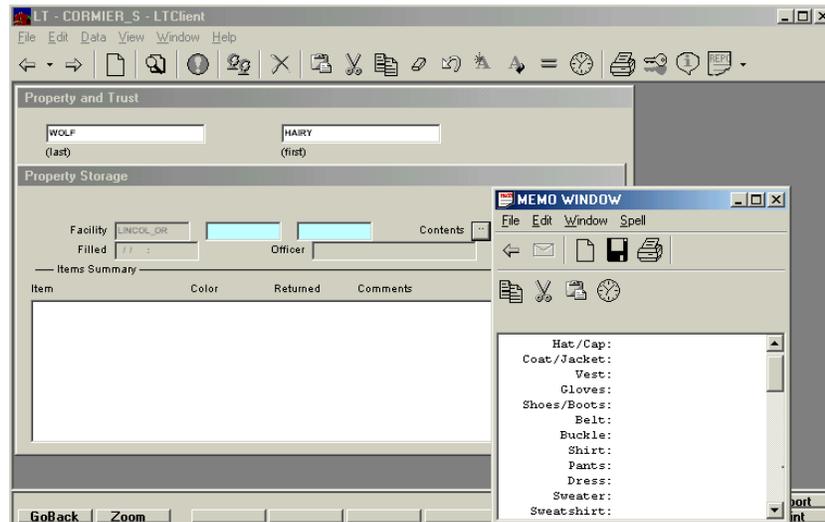
DATES AND TIMES

Dates are entered in “month/date/year” format with 24-hour (or military) times. Clicking on the box located next to date fields will bring up a calendar for ease of entry. Note the arrows shown below for moving forward and backward through the months. For efficient manual entry, only the digits are typed, with punctuation supplied by the software. For example, 03/08/2003 03:22 is entered by typing 030820030322.



MEMO FIELDS

While many of the **Lock&Track's** fields are restricted as to how many characters can be entered, many screens also provide one or more fields where you can enter unlimited text. These are called **Memo Fields** and are accessed by clicking on the  button next to a label. Here we see the Property Storage window with memo field in the foreground.



After the information has been entered, you can send it via email to another party (**1** below), save it to the database (**2** below) or print it (**3** below). This information also can be saved to a clipboard, using the cut and paste function, for use in another program.



MESSAGE AND STATUS LINE

The **L&T** application window includes a message and status line to provide contextual prompts. For example, if you are searching through a list of data records and you are at the end of the list, the message box will show **No records found**.



The **"M"** in the status box shown above tells you the record on the screen has been modified and not yet committed. Other indicators that can appear in the status box include:

- **"R"**, which means that a record is on the screen. This data record is the one that you have sought to retrieve to review and/or update.
- **"RM"**, which means the record is both on the screen and modified.

The message line also is an important place to look for key information throughout the process. For example, suppose you tried to save changes to a record but required fields were missing values. If any required field is empty, the cursor is moved to that required field (which is typically shaded blue) and the message, **Required field**, is displayed.

Finally, context sensitive tips appear on the far right. In the case shown, the cursor is in the RName (Rest of Name) field.

ON-LINE HELP

Help is available when you are in the middle of a function. To get to help or a specific screen, click the **Help** drop-down menu item, then click on **Screen Help**. This will open your default Internet browser to access **Lock&Track**'s Web-based Help Library.

A box will appear for you to enter your **USERNAME** and **PASSWORD**. You are given the option of saving the password so that you will not have to log in every time you use online help. Click **OK** and online information will appear. Since you clicked on **Screen Help**, this information should address tasks that are on the screen in front of you.



If the information isn't exactly what you are looking for, click on the question mark button and a list of help items will be displayed. Scroll through the list and click on the link that best describes what you are trying to do.

To exit from **Help**, click on the **File** drop-down menu and then click on **Exit** or **Close**. However, if you prefer, you can leave this Help browser window open as a reference while you continue to use the **Lock&Track** application.

From the **Help** button, you also can click on **Help Topics**. That will give you a list of topics for which you may need help (*i.e.*, Intake, Searching, Photos, *etc.*). Double click on a topic to display help text in your browser.

LOGGING OUT

To quit working in **Lock&Track** and logout your session, click on **File> Exit**. Remember to commit any changes still indicated with an M in the status bar before you log out!

LOCKING AND UNLOCKING THE APPLICATION

If you are leaving your computer for just a few minutes and don't want to log off, the **Lock** key will protect your session until you return and type your password. If someone else needs to log you out during your absence, they can choose the exit button, shown below. Note that this will end your session, but will not allow them access to your account.

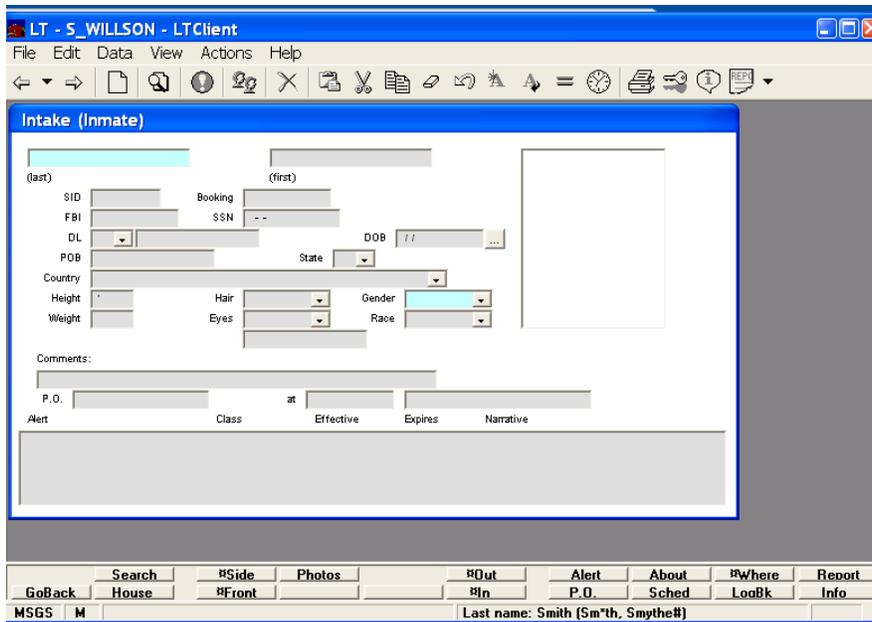


WORKING WITH RECORDS

A **data record** is a collection of information which is treated as a unit. Examples include an inmate's intake information, an officer's training records, or the list of aliases for a particular inmate. Clearly records can be organized at different levels. For end-users the most useful way to think about records is by the screen. A screen of related information is a record which can be altered, cloned, or deleted.

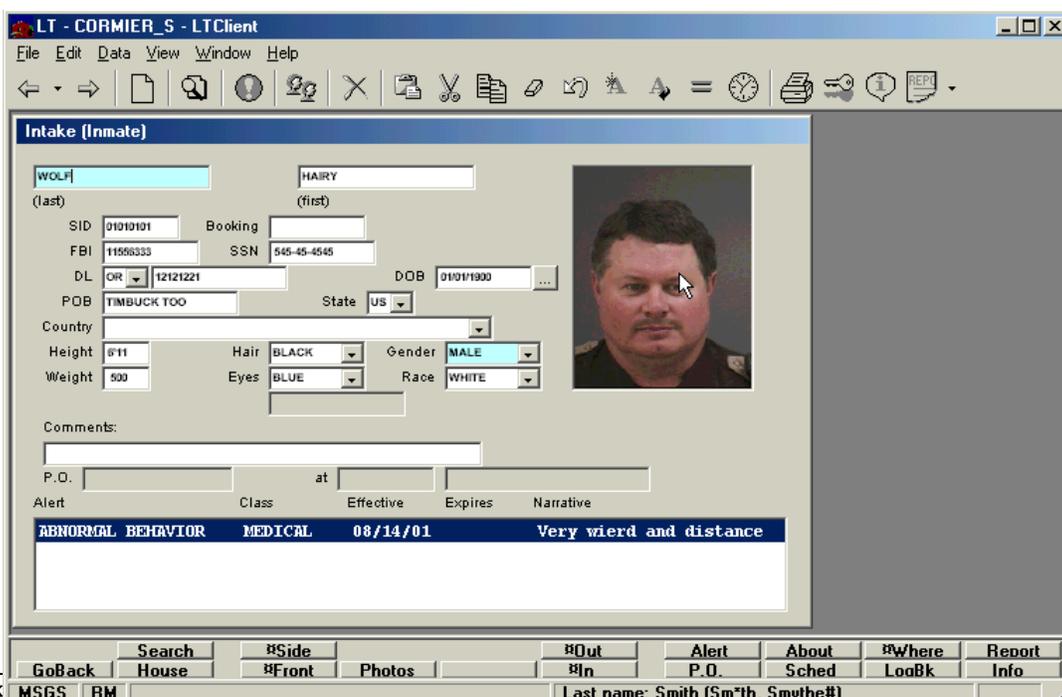
RETRIEVING AND VIEWING RECORDS

We return to the intake screen:



To locate a specific record, enter information in just those fields that you can match exactly and click **Find Data** . Click the **Clear All Data** function key  (**Shift Delete**) to remove data from a previous record if needed. Note that incorrectly entered information will cause the search to fail. For searches where you have partial or insufficiently unique information, use wildcards, or use the search screen by clicking on "Search" in the lower navigation.

If multiple matches exist, you can move through them by clicking Find until the message bar informs you no more matches are available.



PERFORMING SEARCHES

LockWorks products offer sophisticated search functionality, including wildcards and soundex (phoneme based) searching. For example, if you have the last name and part of the first name, you can enter those variables in the appropriate fields (*i.e.*, last name and first name, such as “WOLF, HA*”). The asterisk indicates a wildcard search, where any person named “WOLF” who has a first name that begins with “HA” will appear. (A common error is to forget the wildcard character, which will omit partial-matches.) To conduct the search, click **Find** on the toolbar (or the **Home** key on your keyboard) to retrieve the records.

If multiple matches exist, they will be displayed in a list. Here we have searched on just the last name WOLFE, bringing up multiple matches.

The screenshot shows a software window titled "JAIL - S_WILLSON - LTCClient" with a menu bar (File, Edit, Data, View, Actions, Help) and a toolbar. The main area is a "General Search" form. The search criteria are: Last name "WOLFE", First name "HAIRY ARMS". Other fields include DOB (01/01/1900), SID (010101), POB, FBI (1155333), Height (4'06"), Hair (WHITE), Eyes (BLACK), Sex (MALE), Race (WHITE), Mark (TATCHEST), and Desc (ASIMO). A small photo of a man is visible on the right. Below the form is a table of search results:

SID	Name	S	DOB	Housed
3276920	WOLFE, DAVID LEON	M	12/20/67	RELEASED
06894963	WOLFE, EARL WAYNE	M	01/05/67	RELEASED
08260403	WOLFE, GLEN EDWARD	M	04/28/87	RELEASED
01010101	WOLFE, HAIRY ARMS	M	01/01/00	LINCOLN OR B 3 A
3609377	WOLFE, JAMES ALBERT	M	12/28/58	RELEASED

At the bottom of the window, there is a "GoBack" button and a status bar showing "MSG5 RM".

WILDCARD SEARCHING

For any wildcard search, enter the data that you know and use the * in the field where you want “any character matches.” For example, if you enter “SMITH” in the last name and “J*” in the first name field, the search will retrieve anyone with the last name of Smith and whose first name begins with a **J**. That could include John Smith, Joe Smith, Julie Smith, *etc.* You can use % to represent any single character: “SMITH, J%%” will find John Smith and Jack Smith, but not Joe or Julie Smith.

Here are some examples of searches that could be conducted:

<u>To find:</u>	<u>Enter:</u>	<u>Sample matches:</u>
Any word beginning with an “S”	S*	SUE, SUSAN, SAM, SAMUEL
Any word starting with a “J” and ending with an “N”	J*N	JOHN, JEAN, JONATHAN
Any two-letter word starting with an “N”	N%	NO
Any three-letter word that ends in a “T”	%%T	BAT, CAT, MAT, FAT
Any word of exactly four characters	%%%%	THIS, WEEK, WORD, NAME

Other combinations of wildcard searches are permitted, such as “SM%T*”. Names that could appear as a result of this search include Smith, Smythe, Smithe and Smittie.

SOUNDEX SEARCHES

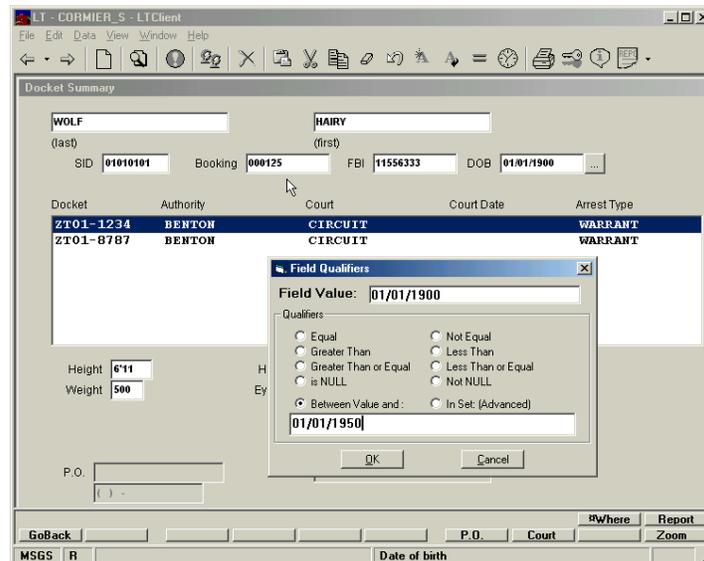
Some names sound familiar but can be spelled in multiple ways. To find matching records, or words that “sound like” the name, enter the way you think the name or word might be spelled and put a # sign after it. For example, you could type in “WOLF#”, click the **Find** button (or **Home** key on your keyboard) and you will receive a list of last names that sound like Wolf but may be spelled differently. For example, the search of “sounds like WOLF#” could result in names that are spelled like Wolff, Wolf, Wolfe or Wulff.

QUERY BASED SEARCHES

The toolbar also offers a search key  which will perform advanced range searching options, such as:

- Finding inmates who are between 5'10" and 6'2" tall, or
- Looking for an inmate whose date of birth was between two dates (*i.e.* between Jan. 1, 1952 and Jan. 1, 1959).

An example of a DOB range search is shown below.



RECORDS MANAGEMENT

ADDING A RECORD

To add a new record, start with a clear screen (**Clear All Data** function key or **Shift Delete**). Note that the “R” in the status line disappears. That means you are starting a new record; there is no “Record on Screen” – the screen is blank.

To enter information, click in a specific data field (box) and type in the data. You can then either tab to the next field or use the mouse to point and click at the next field where you want to enter data. Some fields include drop-down lists, so you must choose from specific data items, such as the color of the offender’s gender and color of hair and eyes. These drop-down lists are also called validation lists, and the value entered for that kind of field *must* be chosen from that validation list.

Enter the data for all the required fields (those with colored backgrounds) as well as any other data you may have available to you at this time. When you enter information in the first field, an “**M**” is displayed in the status line. That means at least one field has been modified on the screen.

Press **Commit**  to save this new record and insert it into the Offender Database. When you see **Record inserted** in the message line, you know you have successfully added a record.

TO CLONE A RECORD

Lock&Track also lets you clone, or duplicate data, so you don’t have to enter the same data over and over. For example you could clone a record that has housing information so that you don’t have to enter it repeatedly for every cell in a housing unit. Another example is cloning the record of an offender with multiple alias names. This function saves you time because you can change the one or two data fields that are different rather than retyping all of the data.

To do this, retrieve the record you want to clone. Note the “**R**” in the status line, meaning a record is on the screen. Change the data in any of the fields that have different information.

Press the  button, **Clone this Record** function key, or hit **Insert**. This creates a new record with the different values you have entered.

Keep in mind, **Clone** will always insert new data, while **Commit** either modifies existing data or inserts a new data record if you enter all data on a blank, cleared screen. (Remember, no **R** for “Record on Screen”.) Be careful to choose the correct command for the desired operation. When modifying a record, such as correcting the spelling of an offender’s name, be sure to use **Commit**. If you are adding to a list (*i.e.*, dockets, charges), use **Clone** to insert each new record. For example, you don’t want to modify previous charges; you want to add a new one.

UPDATING A RECORD

Once you retrieve the data file you want, you can update or modify it, clone it or delete it. To update a record, click on the field or fields that you want to edit or change. When you change data in at least one field, the letter “**M**” is displayed in the status line. To make sure your changes are saved, look for the words **Record updated** in the message line.

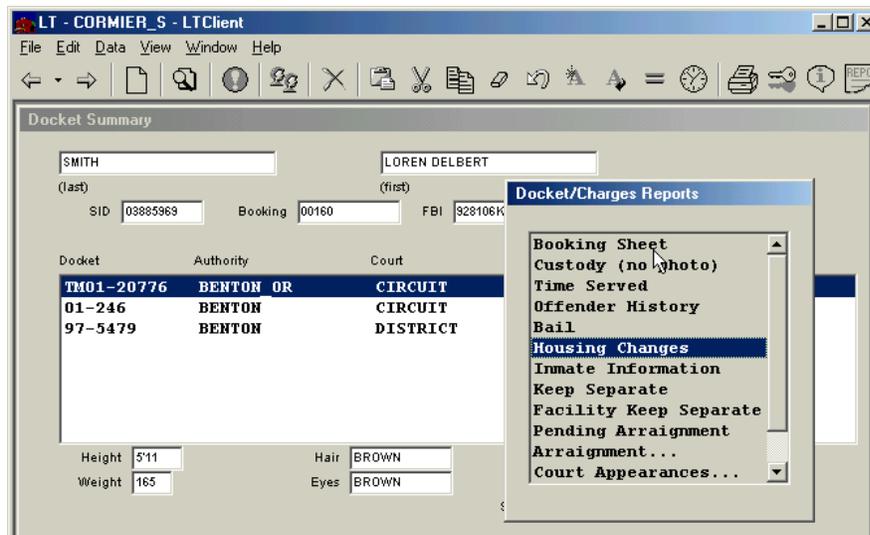
TO DELETE A RECORD

Retrieve the record you want to delete, and carefully confirm that this really is the data you want to delete. Press the  button, the **Delete Record** function key, or hit Ctrl-D. The record will be erased. Verify this in the message line, where the words, **Record deleted**, should be displayed.

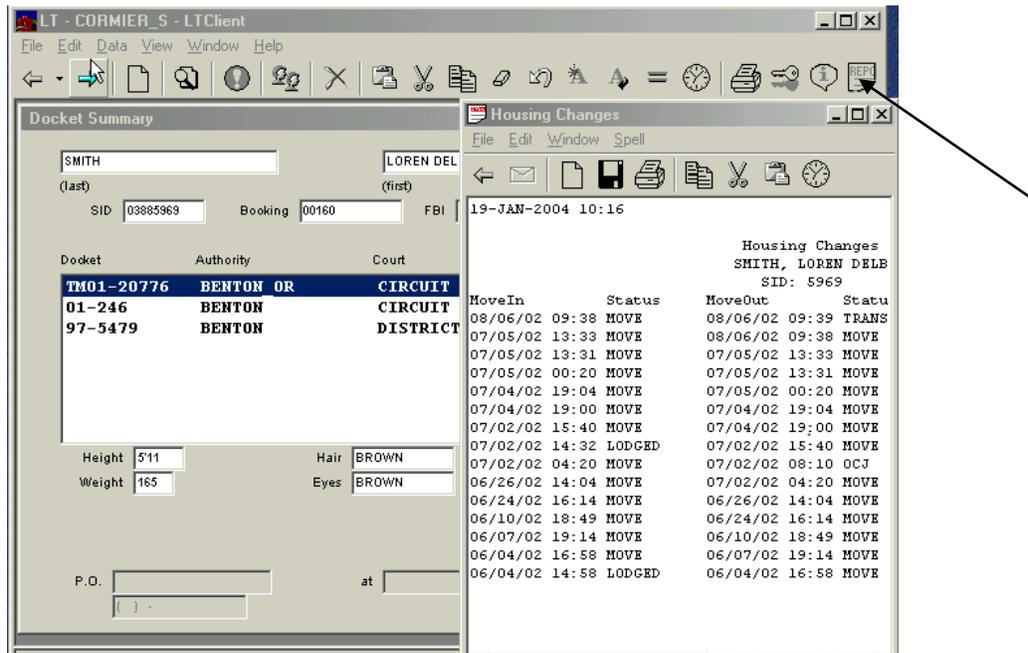
Although the record has been deleted, the data record is still on the screen. This provides you with a back-up in case you deleted the wrong record. If that turns out to be the case, click the **Commit** keystroke to re-insert that data record back into database. If it turns out you deleted the correct record, press **Clear Screen** to remove that data from your desktop.

REPORTS

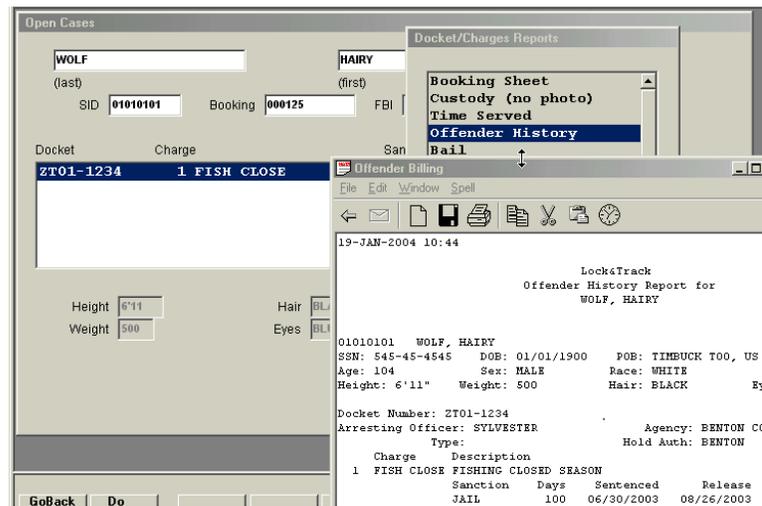
To retrieve reports, click on the **Report** navigational button at the bottom of the screen. A menu of reports will appear, as shown below.



Because the menu of reports is designed to meet the specific needs of each application screen's function, there are different reports on the various report menus, depending on which desktop you are in. When you double click on the specific report you want, the report will appear, as shown below. Sometimes the report will appear behind the screens you already have on your desktop. If that happens, click the **Report** function key to make the report come to the front of all the screens.

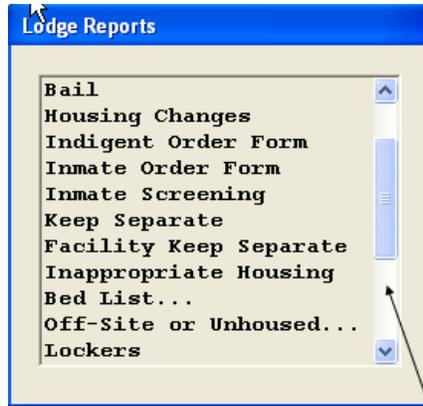


Lock&Track can produce a large variety of reports. Some reports show information that has already been entered into the database, such as housing changes, as shown on the previous page, or offender history, as shown below.



The reports appear in separate windows, which “float” outside of the desktop’s own window — this makes it easy to position the windows to compare information between them. Reports can be viewed, printed, written to a file to include in another document, or emailed to a colleague. You may have several report windows open and active at a time. To remove the report from your screen, press the **GoBack** button on that report window.

The report menu shows all the reports that are available for each application screen.



Note that you may have to use the scroll or slider control to the right of the menu list to see all of the reports available in that menu.

APPENDIX : THE TOOLBAR

The **Toolbar** in **Lock&Track** will look familiar to Windows users. It includes many common Windows toolbar functions, as well as some that are specific to **L&T**.



To find out what the specific functions do, hover your cursor over the lower right hand corner. The example below highlights the **Find Data** key.



A couple of time-saving features that are incorporated into this **L&T Toolbar** include the standard cut and paste, as well as cloning of files. But let's take a look at all the **Toolbar's** features. For each button or control that follows, we'll show its graphic (the button itself), provide its proper name, its "hot-key" in parenthesis if available (this is the keyboard key you can type to activate the same operation as the button itself), and a brief description of what the button or control actually does.



Go Back (Page Up)

Go Back allows you to go back one screen at a time if you are in the middle of an Application Screen process. If you are the start of the Application Screen, such as **Intake**, then **Go Back** will take you back to the **Main Menu**, where the Application Screens are listed (*i.e., Intake, Dockets and Charges, Open Cases, etc.*)



The downward pointing arrow symbol between **Go Back** and **Go Forward** allows you to go back to a specific screen where you have been, such as **Intake**. This key allows you to save time by clicking the area where you want to be one time instead of making several mouse clicks.



Forward (Page Down)

This button allows you to go to the next logical step in the process, depending on which Application Screen is in use at the time. This next logical step is *usually* (but not always) the screen that is navigated to by the **Page Down** navigation button (at the bottom of the



screen).

Clear All Data (Shift Delete)

This clears all data from all fields on the current screen. Some fields may have their default



values restored. You can then enter a new record or begin a new search from this point.

Find Data (Home)

After search criteria has been entered into selected fields, click on this button to perform the search.



Commit to Database (Alt Enter)

Generally, saves data to the database. If you enter data on a previously cleared screen (the status **R** for “Record on Screen” is *not* present), then **Commit** actually *inserts a new data record* into the database. If, however, a data record is first found and displayed on screen (**R** for “Record on Screen”), and you modify one or more data fields, then **Commit** simply *updates* this current record with your changes. Make sure you click **Commit** to save a



record or any changes to the database.

Clone this Record (Insert)

You can use this button to add to a list and to insert a new record rather than modifying one. **Clone** inserts a new record while **Commit** overwrites an existing record. Use **Clone** when you have first found a data record and it is displayed on the screen (**R** for “Record on Screen”). If rather than modifying or updating this record, you want to *derive* or *clone a new record* from it, then modify one or more data fields and press **Clone** to *insert* the new data record.



Delete this Record (Ctrl-D)

This will erase a record. To confirm the deletion, look for the words **Record deleted** in the message line. The record has been deleted, but the data is still on the screen. If it turns out you didn’t mean to delete the record, click **Commit** again to re-insert the data. If it turns out you deleted the correct record, press **Clear Screen** to clear that old data from your screen.



Copy (Ctrl-C)



Cut (Ctrl-X)



Paste (Ctrl-V)

All three of these functions are the same as those used in Windows. You can **Copy** or **Cut** words from one data field and **Paste** them to a different data field.



Clear Field (Shift Backspace or Alt Backspace)

Clears the data value from a field. Put the cursor in the field you want cleared and then press **Clear Field**.



Undo Last Field Change (Ctrl-U)

If you make a change in a field and then realize you entered the information in the wrong field or decided not to make the change, press **Undo Last Field Change**.



Set Default Value for this Field (Alt Keypad_Star)

In some situations you may want to set a default for a specific field, such as country or gender. Enter the default you want to use, such as **“MALE”**, and press **Set Default** to make



this value the current default for this field.

Restore Default Value for this Field (Ctrl Keypad_Star)

Restores the current default value for a field, regardless of whether that field is currently



blank or has some other value.

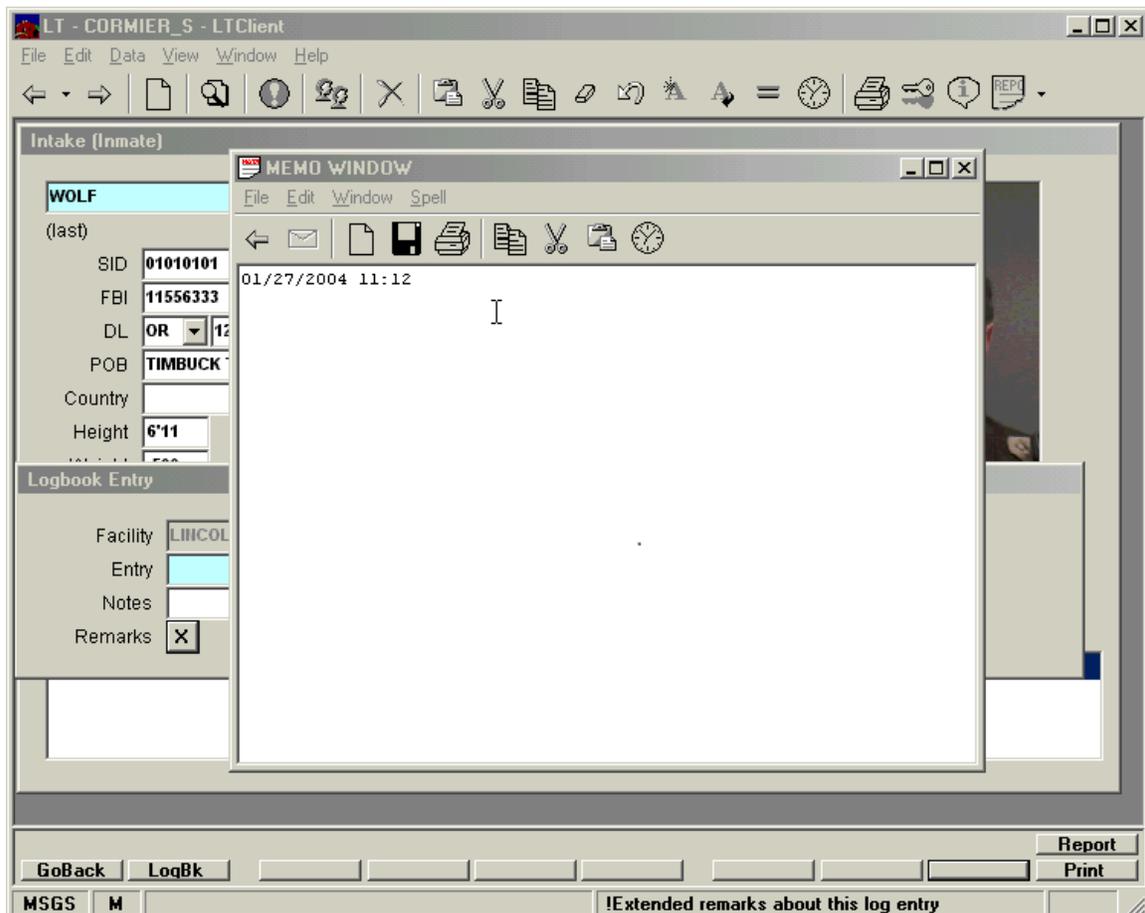
Set Search Qualifiers for Current Field (Ctrl Equal)

Use this to search for something that happened between two specific dates, such as someone who was born between 1952 and 1959 or to search for an offender arrested during an identifiable time period. Other search conditions also are available, such as value is less than or greater than, value is not missing, or value is missing, *etc.*



Insert Time Stamp (Ctrl-T)

Click on this button to enter the current date and timestamp (*i.e.*, “now”). An example of a date and time stamped into a **Memo Window** is shown below. This function can be used in any field that can accept either a date/timestamp data value, or a character-string field that does not have a validation list.



Print Current Window to Default Printer (Ctrl-P)

This button will send an image of the current screen to your default printer.



Lock Session (Ctrl-L)

If you are just leaving your computer for a few minutes and don't want to log off, click the **Lock** button, and your place in the program will be saved. If you are gone for five minutes, it's a quick entry of your password and a click on the unlock button, and your application will reappear as you left it. If, for some reason, you get tied up for a longer time and maybe even leave for the day, another staff member can log off for you.

To logout another user's locked **L&T** session, click on the **Exit** button. This will logout that other user so that you can login under your own **L&T** username and password (as required



by the system security policy).



View Message Window (Ctrl-M)

System-wide messages may be broadcast to all users at any time. To check system messages, press this button, or use Ctrl-M, or click on the word **MSGS** in the status line.



View Report Window (Ctrl-R)

Click this button to view reports that are present. In the example below, the Trust Receipt for Hairy Wolf is shown with the date and time stamped in the **Memo Window**. This report is on top of the **Property and Trust** screen because the **View Report Window** was clicked.

