Crossroads Software, Inc.
Guide to The Handheld Desktop Module
Search and Modify Citation Records

This convenient guide to the Handheld Desktop Module shows users how to search for citation records and, then, how to make modifications to those records, such as editing notes, creating amendments, and voiding citations. The Module also allows users to print citations to a standard printer.

Before using this guide, you should already be familiar with syncing, or at least be using a desktop workstation that has access to existing citation data. The Handheld Desktop Module is for viewing, maintaining, and amending citations after they have been synced with the desktop workstation and have been off-loaded for records management.

We’ll go through the Search options one by one. There are two basic areas of the Search feature: the search process itself and the search results.

I. Searching Citation Records

The first thing you’ll need to do is access the Search Menu. To do this, open the Handheld Desktop Module. From the Main Menu, click on the Search button. The Search Menu (Fig. 1.1 below) will open.

![Fig. 1.1](image-url)
You’ll notice that there are several main headings and sections in the Search Menu: Citation Dates, Citation Number, and Officer Information. These are “search parameters,” fields that allow you to limit your search to get the types of results you want (if your database has hundreds or thousands of citations, sifting through them one by one -- without specific search parameters -- can take a long time).

Next to these search parameters is the **Search** button. Basically, all you need to do is set the parameters and then hit Search. The Handheld Desktop Module will then query the database and return all matching citations.

Let’s look at how these search parameters work.

**Citation Dates**

All searches require, at minimum, a date range (even if you do not set any other search parameters). The date range consists of a **Start Date** and an **End Date**. The Search will find all citations between, and including, the Start Date and End Date. This is a convenient feature because it allows you to look for as many, or as few, citations as you need. For example, you can bring up many citations by using a wide date range, such as several months or a year. Or you can narrow the results by selecting a more specific range, such as a couple of weeks or a few days.

When entering dates, you must use the standard, eight-digit format: two digits for the month, two for the day, and four for the year. So, for example, if you want your Start Date to be January 5, 2005, you would enter 01, then 05, and then 2005. (Don’t worry about slashes between the month, day, and year -- the Module will input these for you. Also, after you enter the dates, the Module might redisplay the dates without the zero in front of the month or day, but you are still required to use the standard, eight-digit format.)

![Citation Dates](image)

**Fig. 1.2**

First, enter your Start Date. The cursor will then automatically jump to the End Date field. Now, input your End Date. Finally, hit the **Search** button. The Module will display all citations in that date range in a new window.

**Fig. 1.3** below shows sample results.
We’ll take a closer look at the Search Results Form later. For now, let’s continue with the Search Menu.

There’s an additional option in the Citation Dates field called **Quick Date**. The Quick Date sets a date range for you. You can select the last seven days, the last 30 days, the last 365 days, or year to date.

Select the range you want from the drop-down menu by clicking on it with the mouse. Then, hit the **Set Dates** button. The dates in the Start Date and End Date will change. In Fig. 1.5, we’ve selected “Last 7 Days,” and the Module shows a date range of one week.
Finally, you tap on the Search button to find any and all citations in that seven-day period.

**Citation Number**
Searching by citation number is another effective way of locating specific citations in the database. Because each citation has a number, and because the Citation Number field allows you to limit your search in various ways, you can easily find the specific citation(s) you are looking for.

To look for a citation number, just enter the number and then hit the Search button.

If you need to search for a range of citations, you can use the Citation Number field for this as well. This is what’s known as a “wildcard” search. A wildcard search uses the asterisk (*) along with letters or numbers; where you place the wildcard and how many letters or numbers you use will determine the type of search results you get.

For example, if you enter C*, the Module will search for any and all citation numbers that begin with C. If you enter C0*, the Module will search for citation numbers that begin with C0. The more letters or numbers you enter, the narrower your search will be.

You can also use the wildcard character at the beginning of a search string. For example, if you enter *123, the Module will find any citation numbers that end with 123.

Finally, you can search by letters or numbers that lie in the middle of a citation number. So, let’s say you enter *044* in the Citation Number field. The program will find any citations with numbers that have 044 in the middle (somewhere between the first and last digits).
So, to sum up, you can search citation numbers in the following ways:

- Full citation number (will return that exact citation)
- Beginning characters, using 1 or more (e.g., C*, C0*, C0711*, etc.)
- Ending characters, using 1 or more (e.g., *3, *23, *123, etc.)
- Middle characters, using 1 or more (e.g., *4*, *04*, *040*, etc.)

The Citation Number search, in conjunction with the Citation Date, can prove to be extremely helpful if you are searching a large number of citation records.

**Officer Information**
In addition to Citation Number, another way to narrow your search is to use the Officer Information field. This drop-down list allows you to search by Officer ID, so that you will get any and all citations written by a specific officer during the specified date period (remember that, at minimum, you always have to enter a date range).

![Officer ID List](Fig. 1.7)

Open the Officer ID list and select the ID you need by clicking on it with the mouse. Next, hit the Search button to execute the search.

You’ve learned how the search process works. Let’s now look at search results and the various options you have for amending, voiding, and changing citation records.
II. Search Results

Once you run a search, the Module shows the resulting citation records in the Search Results Form. The citations are displayed in rows, with specific data appearing in columns. From the left, the Form shows the Citation Number, Citation Date, Last Name (of violator), First Name (of violator), Description (of violation), Officer ID, and Citation Status.

![Search Results Form](image)

**Fig. 1.8**

At the top of the screen are a series of buttons that provide you with various options for the citations: Edit Notes, Print Preview, Print, Create Amendment, Void/Unvoid, and Close.

Before you can use any of these options, you must first select a citation to edit, print, amend, or void/unvoid. To select a citation, find the one you want to work with and click on it once with the mouse. The selected citation will be highlighted in black.

![Selected Citation](image)

**Fig. 1.9**
Next, select an option from the top. We’ll go through them one by one.

**Edit Notes**

Officers will sometimes write notes for a traffic stop; if you want to edit these notes, just select “Edit Notes” at the top, and the Module will open the ticket and will display a window on the right with the existing notes.

When the screen opens, the text in the Notes field will be highlighted. Using the keyboard, write in new notes or make changes to the existing ones. When you have finished editing the notes, click the **Save & Close** button to input the changes and return to the Search Results Form.

If you edit the notes but decide you do not want to keep the changes, just click **Cancel**.
Print Preview

Once you have selected a citation in the Search Results Form, you can select Print Preview to view how it will look when printed to a standard printer. Print Preview gives you options for viewing various sections of the citation (such as the amendment or the continuation form) and for printing either the entire citation or various sections.

Fig. 1.11 shows a portion of the Print Preview screen.

(Another way to enter Print Preview is to double-click a citation in the Search Results Form.)

At the top of the Print Preview screen are three menus that provide you a number of useful options. The first one is the Print Menu.

You can print specific sections one at a time by clicking on a selection in the menu: Citation, Officer Graphic Notes, Amendment, or Continuation. If you want to print all elements of the citation, move down to Print: All and click on it.
The Go To Menu allows you to jump to specific areas of the citation record so that you can view them.

![Go To Menu](image)

Fig. 1.13

Finally, there is the Close Menu. Select Close: Current to close the current citation or Close: All to close all open citation records.

Closing will return you to the Search Results Form.

Now that we’re back in the Search Results Form, let’s continue looking at the options at the top.

**Print**
This function sends the citation record straight to the printer, without entering Print Preview mode.

**Create Amendment**
With this option, you can create, print, and save an amendment for each citation. First, select the citation you want to amend from the Search Results Form and hit the Create Amendment button; a new form will open.

![AMENDMENT FORM](image)

Fig. 1.14
The Amendment Form is a free-entry form that allows you to change specific information within the citation. The original citation data (Date, Time, Violation, and Location) appears on the right. Use the open fields at the top and on the left to amend the citation data.

To navigate from one field to the next, use the Tab key on your keyboard.

The **Citation Number** appears at the top. Input a **Case #** and the **Amending Officer Name**. Next, you can amend the **Cite Date** and **Court Date**, as well as the **Time** for both, by inputting new dates and times (be sure to observe the standard eight-digit date format). If necessary, you can also amend the **Violation** and **Location**.

Finally, at the bottom, you can specify additional changes in the **Other Change Specify** field, and can mark the **Correction Date** (the date on which you are amending the citation) in the last field on the form.

When you have finished making amendments, click on the **Print/Save** button. The Module will automatically print a “**Notice of Correction and Proof of Service**” on your workstation printer, and will also save the amendment in the database.

Click **Close** to return to the Search Results Form.

**Void/Unvoid**

In the event that you need to void an existing traffic citation, use this option in the Search Results Form. Voiding a citation, however, is not a final act; every voided citation can be unvoided. To void a cite, you need to follow a few simple steps.

First, select the citation you want to void from the list in the Search Results Form.

Click the **Void/Unvoid** button.

A dialog box will appear, stating: “**You are about to void citation number X. Do you want to continue?**” (the actual number, of course, will appear, instead of our sample X).

Click **Yes** to continue.

Another dialog box will appear, and this one will state: “**Please give a reason for voiding this citation.**” In the available field, write in your reason.

Click **OK** to continue.

The Module will automatically void the citation. The citation’s status, which appears in the **Cite Status** column in the Search Results Form, will read “**Void.**”
To unvoid an voided citation, follow these steps:

First, select the voided citation from the list in the Search Results Form.

Click the **Void/Unvoid** button.

A message will pop up, stating, “You are about to unvoid citation number X. Do you want to continue?” (the actual number, of course, will appear, instead of our sample X).

Click **Yes** to continue.

The Module will automatically unvoid the citation. The citation’s status, which appears in the **Cite Status** column in the Search Results Form, will return to its previous form (“Assigned,” “Closed,” etc.)

**Finishing With the Search Results Form**

When you are finished with the Search Results Form and no longer need to use any of its options, just click the **Close** button at the top. You will return to the Search Menu, where you can run another search. If you do not need to run another search, just hit the **Close** button to return to the Main Menu.

To exit the Handheld Desktop Module, hit **Exit**. You will be asked to confirm your choice, and then the Module will close and take you back to Windows.