

# Crossroads Software, Inc.

## Guide to The Handheld Desktop Module

### Search and Modify Citation Records

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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.

The screenshot shows the 'SEARCH MENU' interface. At the top, there is a banner for 'Crossroads Software' with a row of six small landscape images. Below the banner, the title 'SEARCH MENU' is centered. The interface is divided into several sections:

- CITATION DATES:** A yellow header section containing:
  - Start Date: 3/10/2005
  - End Date: 5/9/2005
  - QUICK DATE: [dropdown menu] Set Dates
  - Print Citation Log search results
- CITATION NUMBER:** A yellow header section containing:
  - (\*) CITATION #: [text input field]
- OFFICER INFORMATION:** A yellow header section containing:
  - OFFICER ID: [dropdown menu]

On the right side of the form, there are two large buttons: 'SEARCH' and 'CLOSE'.

Fig. 1.1

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:	
Start Date:	3/10/2005
End Date:	5/9/2005
QUICK DATE:	<input type="button" value="Set Dates"/>
<input type="checkbox"/> Print Citation Log search results	

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.

SEARCH RESULTS FORM						
EDIT NOTES	PRINT PREVIEW	PRINT	CREATE AMENDMENT	VOID/UNVOID	CLOSE	
Cite Number	Cite Date	Last Name	First Name	Description	Officer Id	Cite Status
C0000001	4/21/2005 3:13:38 PM	GRAHAM	AL	UNLICENSED DRIVER	765	assigned
C0000002	4/21/2005 3:19:07 PM	GRAHAM	AL	UNLICENSED DRIVER	765	assigned
C0000003	4/21/2005 3:25:29 PM	JOHNSON	KIRK	UNLICENSED DRIVER	765	closed
C0000004	4/21/2005 3:31:47 PM	FREEMAN	CARL	UNLICENSED DRIVER	765	assigned
C0000005	4/21/2005 3:36:41 PM	SEPULVEDA	PAUL	UNLICENSED DRIVER	765	assigned
C0000006	4/21/2005 3:41:41 PM	THOMPSON	TOMMY	UNLICENSED DRIVER	765	assigned
C0000007	4/21/2005 3:47:31 PM	CHAMBERS	MATTHEW	UNLICENSED DRIVER	765	assigned
C0000008	4/21/2005 3:52:49 PM	KLATT	BRYAN	UNLICENSED DRIVER	765	assigned
C0000009	4/21/2005 4:00:07 PM	KRONBERGER	JIM	UNLICENSED DRIVER	765	closed
C0000010	4/21/2005 4:06:06 PM	JONES	PAUL	UNLICENSED DRIVER	765	closed
C0000011	4/22/2005 8:36:58 AM	CRISE	TIM	UNLICENSED DRIVER	765	assigned
C0000012	4/22/2005 9:00:32 AM	CRISE	TIM	UNLICENSED DRIVER	765	assigned
C0000013	4/22/2005 9:06:12 AM	GIBSON	SEAN	UNLICENSED DRIVER	765	assigned
C0000014	4/22/2005 9:19:34 AM	RUIZ	SEAN	UNLICENSED DRIVER	765	assigned
C0000015	4/22/2005 11:51:25 AM				765	assigned
C0000016	4/22/2005 1:08:02 PM				765	assigned
C0000017	4/22/2005 1:43:29 PM				765	assigned
C0000018	4/22/2005 3:06:50 PM	RUIZ	SEAN		765	assigned
C0000019	4/26/2005 4:41:03 PM	WILLIAMS	JAMES		765	assigned
C0000020	4/27/2005 4:54:14 PM				765	assigned
C0000021	4/27/2005 4:54:29 PM	RUIZ	SEAN	UNSAFE SPEED	765	assigned
C0000022	4/28/2005 1:22:56 PM	JOHNSON	KIRK	UNSAFE SPEED	765	assigned
C0000023	4/28/2005 1:48:32 PM	JONES	PAUL	UNSAFE SPEED	765	assigned
C0000024	4/28/2005 2:14:38 PM	FREEMAN	CARL	UNSAFE SPEED	765	assigned
C0000025	4/28/2005 2:29:39 PM	GRAHAM	AL	UNSAFE SPEED	765	assigned
C0000026	4/28/2005 2:35:27 PM	SEPULVEDA	PAUL	UNSAFE SPEED	765	assigned
C0000027	4/28/2005 2:56:03 PM	CHAMBERS	MATTHEW	UNSAFE SPEED	765	assigned
C0000028	4/28/2005 3:05:23 PM	KROMBERGER	JIM	UNSAFE SPEED	765	assigned
C0000029	4/28/2005 3:14:56 PM	KLATT	BRYAN	UNSAFE SPEED	765	assigned
C0000030	4/28/2005 3:27:45 PM	THOMPSON	TOMMY	UNSAFE SPEED	765	assigned
C0000031	4/28/2005 3:42:22 PM	ALT	ERIC	UNSAFE SPEED	765	assigned
C0000032	4/29/2005 8:42:48 AM	ALT	ERIC	UNSAFE SPEED	765	assigned

Fig. 1.3

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.



Fig. 1.4

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.

Fig. 1.5

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.

Fig. 1.6

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).

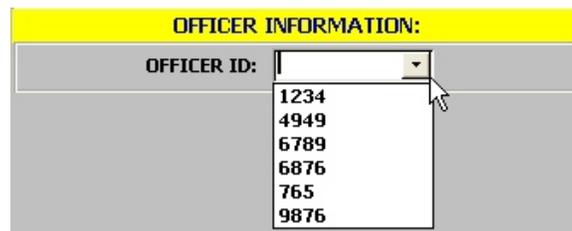


Fig. 1.7

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											
EDIT NOTES		PRINT PREVIEW		PRINT		CREATE AMENDMENT		VOID/UNVOID		CLOSE	
Cite Number	Cite Date	Last Name	First Name	Description	Officer Id	Cite Status					
C0000001	4/21/2005 3:13:38 PM	GRAHAM	AL	UNLICENSED DRIVER	765	assigned					
C0000002	4/21/2005 3:19:07 PM	GRAHAM	AL	UNLICENSED DRIVER	765	assigned					
C0000003	4/21/2005 3:25:29 PM	JOHNSON	KIRK	UNLICENSED DRIVER	765	closed					
C0000004	4/21/2005 3:31:47 PM	FREEMAN	CARL	UNLICENSED DRIVER	765	assigned					
C0000005	4/21/2005 3:36:41 PM	SEPULVEDA	PAUL	UNLICENSED DRIVER	765	assigned					
C0000006	4/21/2005 3:41:41 PM	THOMPSON	TOMMY	UNLICENSED DRIVER	765	assigned					
C0000007	4/21/2005 3:47:31 PM	CHAMBERS	MATTHEW	UNLICENSED DRIVER	765	assigned					
C0000008	4/21/2005 3:52:49 PM	KLATT	BRYAN	UNLICENSED DRIVER	765	assigned					
C0000009	4/21/2005 4:00:07 PM	KRONBERGER	JIM	UNLICENSED DRIVER	765	closed					
C0000010	4/21/2005 4:06:06 PM	JONES	PAUL	UNLICENSED DRIVER	765	closed					
C0000011	4/22/2005 8:36:58 AM	CRISE	TIM	UNLICENSED DRIVER	765	assigned					
C0000012	4/22/2005 9:00:32 AM	CRISE	TIM	UNLICENSED DRIVER	765	assigned					
C0000013	4/22/2005 9:06:12 AM	GIBSON	SEAN	UNLICENSED DRIVER	765	assigned					
C0000014	4/22/2005 9:19:34 AM	RUIZ	SEAN	UNLICENSED DRIVER	765	assigned					
C0000015	4/22/2005 11:51:25 AM				765	assigned					
C0000016	4/22/2005 1:08:02 PM				765	assigned					
C0000017	4/22/2005 1:43:29 PM				765	assigned					
C0000018	4/22/2005 3:06:50 PM	RUIZ	SEAN		765	assigned					
C0000019	4/26/2005 4:41:03 PM	WILLIAMS	JAMES		765	assigned					
C0000020	4/27/2005 4:54:14 PM				765	assigned					
C0000021	4/27/2005 4:54:29 PM	RUIZ	SEAN	UNSAFE SPEED	765	assigned					
C0000022	4/28/2005 1:22:56 PM	JOHNSON	KIRK	UNSAFE SPEED	765	assigned					
C0000023	4/28/2005 1:48:32 PM	JONES	PAUL	UNSAFE SPEED	765	assigned					
C0000024	4/28/2005 2:14:38 PM	FREEMAN	CARL	UNSAFE SPEED	765	assigned					
C0000025	4/28/2005 2:29:39 PM	GRAHAM	AL	UNSAFE SPEED	765	assigned					
C0000026	4/28/2005 2:35:27 PM	SEPULVEDA	PAUL	UNSAFE SPEED	765	assigned					
C0000027	4/28/2005 2:56:03 PM	CHAMBERS	MATTHEW	UNSAFE SPEED	765	assigned					
C0000028	4/28/2005 3:05:23 PM	KROMBERGER	JIM	UNSAFE SPEED	765	assigned					
C0000029	4/28/2005 3:14:56 PM	KLATT	BRYAN	UNSAFE SPEED	765	assigned					
C0000030	4/28/2005 3:27:45 PM	THOMPSON	TOMMY	UNSAFE SPEED	765	assigned					
C0000031	4/28/2005 3:42:22 PM	ALT	ERIC	UNSAFE SPEED	765	assigned					
C0000032	4/29/2005 8:42:48 AM	ALT	ERIC	UNSAFE SPEED	765	assigned					

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.

Cite Number	Cite Date	Last Name	First Name	Description	Officer Id	Cite Status					
C0000001	4/21/2005 3:13:38 PM	GRAHAM	AL	UNLICENSED DRIVER	765	assigned					
C0000002	4/21/2005 3:19:07 PM	GRAHAM	AL	UNLICENSED DRIVER	765	assigned					
C0000003	4/21/2005 3:25:29 PM	JOHNSON	KIRK	UNLICENSED DRIVER	765	closed					
C0000004	4/21/2005 3:31:47 PM	FREEMAN	CARL	UNLICENSED DRIVER	765	assigned					
C0000005	4/21/2005 3:36:41 PM	SEPULVEDA	PAUL	UNLICENSED DRIVER	765	assigned					
C0000006	4/21/2005 3:41:41 PM	THOMPSON	TOMMY	UNLICENSED DRIVER	765	assigned					

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.

NOTICE TO APPEAR										C0000002	
TYPE: TRAFFIC											
Date of Violation		Time		Day of Week		Case Number					
4/21/2005		3:19 PM				C0000002					
Name (First, Middle, Last)						Owner's Responsibility (Veh. Code, sec. 40001)					
AL GRAHAM											
Address											
348 MAIN ST											
City		State		ZIP Code							
EL SEGUNDO		CA		90245							
Driver License No.		State	Class	Age	Birth Date		Juvenile Phone				
A1234567		CA	C	57	10/11/1947						
Sex	Hair	Eyes	Height	Weight	Race	Other Description					
M	WHT	BLK	600	225	H						
Veh. Lic. No.				State		<input type="checkbox"/> COMMERCIAL VEHICLE (Veh. Code, sec. 15210(b))					
PLATE				CA							
Yr. of Veh.	Make	Model	Body Style	Color		<input type="checkbox"/> HAZARDOUS MATERIAL (Veh. Code, sec. 353)					
2000	HOIDA	ACCORD	2 DOOR	WHITE							
Evidence of Financial Responsibility A PLUS										<input type="checkbox"/> (Veh. Code, sec. 353)	
Registered Owner or Lessee (First, Middle, Last)										<input checked="" type="checkbox"/> Same As Driver	
Address										<input checked="" type="checkbox"/> Same As Driver	
City		State		ZIP Code							
				0							
Correctable Violation (Veh. Code, sec. 40010)										<input type="checkbox"/> Booking Required	
Correctable Code	Section	Description								Misdemeanor or Infraction	
<input type="checkbox"/>	CVC 12500A	UNLICENSED DRIVER								0	
<input type="checkbox"/>											
<input type="checkbox"/>											
<input type="checkbox"/>											
Speed Approx.	PF/hrs Spd.	Veh. Lmt.	Sign	LASER	<input type="checkbox"/> Confusion Form						
> 30	25	25	20	X30							
Location of Violation(s)										City/County of Occurrence	
NB 0 NORTH HAWTHORNE BLVD										hawthorne	
0 AT MARINE AVE											
Traffic	Weather	Street	Light	Accident	Zone						
MEDIUM	CLEAR	WET	DUSK	NO	LOC1						

NOTES

Vehicle southbound in number 1 lane. Overtaking vehicle in no. 3 lane. Estimated 35 MPH, road 45 MPH, locked at 55.

CANCEL

SAVE & CLOSE

Fig. 1.10

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.

NOTICE TO APPEAR										C0000002							
TYPE: TRAFFIC										NOTES							
Date of Violation		Time		Day of Week		Case Number				Vehicle southbound in number 1 lane. Overtaking vehicle in no. 3 lane. Estimated 35 MPH, road 45 MPH, locked at 55.							
4/21/2005		3:19 PM		THURSDAY													
Name (First, Middle, Last)												<input type="checkbox"/> Owner's Responsibility (Veh. Code, sec. 40000)					
AL												GRAHAM					
Address																	
348 MAIN ST																	
City		State		ZIP Code						VIOLATOR STATEMENT  VIOLATOR ATTITUDE							
EL SEGUNDO		CA		90245													
Driver Lic. No.		State		Class		Age		Birth Date				Juvenile Phone					
A1234567		CA		C		57		10/11/1947									
Sex		Hair		Eyes		Height		Weight				Race					
M		WHT		BLK		600		225		H							
Veh. Lic. No.		State		<input type="checkbox"/> COMMERCIAL VEHICLE (Veh. Code, sec. 52100.1) <input type="checkbox"/> HAZARDOUS MATERIAL (Veh. Code, sec. 853)													
PLATE		CA															
Yr. of Ych.		Make										Model		Body Style		Color	
2000		HONDA										ACCORD		2 DOOR		WHITE	
Evidence of Financial Responsibility		A PLUS															
Registered Owner or Lessee										<input checked="" type="checkbox"/> Sam @ A's Dr Vfr							
Address										<input checked="" type="checkbox"/> Sam @ A's Dr Vfr							
City										State		ZIP Code					

Fig. 1.11

(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**.

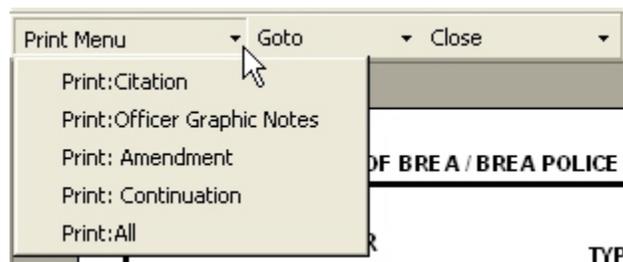


Fig. 1.12

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.

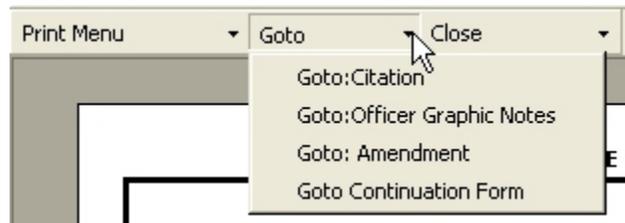


Fig. 1.13

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.

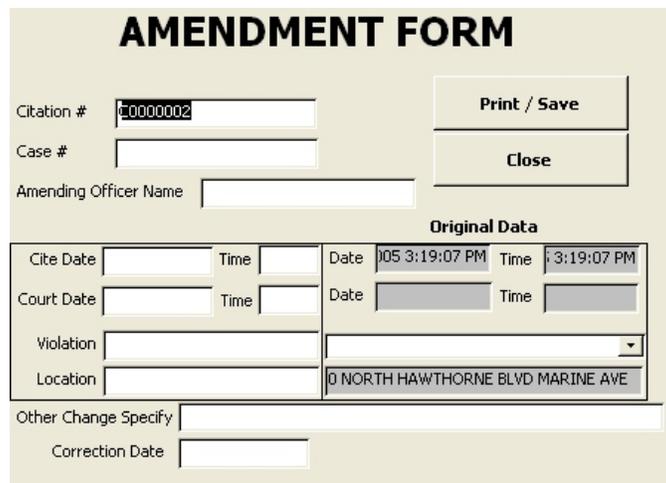


Fig. 1.14

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.