# Active Agent User Guide

## Contents at a Glance

Overview
- Monitoring
- Task Setup Basics
- Add New Tasks
- Collaboration
- Notification
- Check Alerts
- View Alert Messages
# Table of Contents

General Overview .................................................................................................................. 5
Functional Overview .............................................................................................................. 5
User Interface .......................................................................................................................... 6
Monitoring............................................................................................................................... 7
  Task Setup Basics ............................................................................................................... 7
  Settings ............................................................................................................................... 7
  Add New Tasks .................................................................................................................. 8
Collaboration .......................................................................................................................... 8
  Collaboration Levels ......................................................................................................... 8
  Instant Collaboration ....................................................................................................... 9
Notification ............................................................................................................................ 9
  Check Alerts ..................................................................................................................... 9
  View Alert Messages ....................................................................................................... 9
Index ...................................................................................................................................... 11
### Table of Figures

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Agent Subtab form</td>
<td>6</td>
</tr>
<tr>
<td>2</td>
<td>Monitor future additions to this search</td>
<td>6</td>
</tr>
<tr>
<td>3</td>
<td>Agent Tasks</td>
<td>7</td>
</tr>
<tr>
<td>4</td>
<td>Edit Agent Settings</td>
<td>7</td>
</tr>
<tr>
<td>5</td>
<td>Add New Tasks</td>
<td>8</td>
</tr>
<tr>
<td>6</td>
<td>Collaboration Levels</td>
<td>8</td>
</tr>
<tr>
<td>7</td>
<td>Instant Collaboration</td>
<td>9</td>
</tr>
<tr>
<td>8</td>
<td>Agent Notifications</td>
<td>9</td>
</tr>
<tr>
<td>9</td>
<td>View Alert Messages</td>
<td>10</td>
</tr>
</tbody>
</table>
General Overview

- Automate queries and alerts.
- Custom notifications based on user-defined parameters.
- Instant notification when new information is available.
- Classify alerts based on need to know policies.
- Promote information sharing.
- Facilitate collaboration internally and across jurisdictions.
- Saves time, increases effectiveness.
- Support best practice work methods.
- Speed investigations.
- Protect confidential investigations.
- Specify how to receive notifications concerning a monitoring task.
- Enter a context note associated with a monitor task.
- Indicate a cease-to-function date for a monitor task.
- Privacy Levels for collaboration tasks include not visible to any other user or visible to all other users.
- When two collaboration tasks match, each user is notified of the other according to means, privacy level, and notification level for that particular task.
- Search for collaboration tasks entered by other users.
- Display a list of users currently monitoring a database task.
- Receive a notification on a cellular phone or pager from existing services, or by email or text notification within COPLINK.
- Notification Levels include do not receive any notifications concerning this task or receive all notifications concerning this task.
- Set and store default notification settings, including cellular phone number, pager number, email address, and contact information.
- Enter a mail template that is appended to the beginning of all notification messages.
- Receive a link to a details page of new or updated entities from notification messages displayed within COPLINK.

Active Agent is an add-on module for Detect and streamlines investigations by automating repetitive or periodic queries based on user-defined parameters. Investigators are then instantly notified when new information is available within COPLINK.

This increases investigator effectiveness who manage multiple cases, while making it far more difficult for criminals to stay under the radar. Alert methods include email, an HTML message within COPLINK, cell phone, PDA device and/or pager notification to one or more individuals or groups. Investigators can also specify duration of queries and edit or delete notifications based on preferences or case status.

Active Agent is also a collaboration tool that supports the creation of ad hoc task forces, standing investigative teams and increases “institutional knowledge” across the organization.

Investigators can be notified when others are conducting a similar query, which increases collaboration within and across jurisdictions, or choose to disable the function to protect confidential investigations. Likewise, standing investigative teams can use Active Agent to ensure that all members are up to speed on new developments.

Functional Overview

Notify Users of Interesting Database Updates. COPLINK Active Agent is an add-on module that collaborates and shares two-way information with privacy levels, as well as searches for collaboration tasks entered by other users. Notifications can be received on cellular phone, pager, email or by text message.

Monitoring - setup monitoring attributes quick
- Create a monitor task on a database entity from the results page of a search.
User Interface

Agent functionality contains the following components:

**Menu Bar**

*Use the clickable drop down menu to control tasks.* Click on the Agent Menu Item name to open/close the menu.

**Tool Bar**

Click on the Alerts Tool Bar shortcut to get available alerts. Note that when new (previously unviewed) alerts exist, a number is displayed indicating the quantity of new alerts available for viewing. If new or changed data is found, results are displayed in this window.

**Agent Form**

The main workspace area is where search input can be entered and agent task attributes can be setup. On any search form click on the subtab to display agent attributes that may be set for the current search.

*Note:* Task attributes entered in the Agent component of a search form replace existing global attributes in the Settings Window for the current search only.

Add New Tasks

The resulting Summary Table from a search allows you to add new agent tasks based on displayed search results. Click on the checkbox in the Agent Monitoring column (first column on the left) to select and add a particular found entity to your task list.

Click on the item at the top of the table to receive an update that contains additional new or changed entities for the current search.

Change Task Details

Click on the Display Agent Tasks item in the Agent menu to display a list of current tasks being monitored.

Click on the View Details link to display the Agent Task Details window. The Agent Task Details window shows all current task attributes and allows you to update several of them. You may also delete a task by checking the appropriate box and clicking on the Delete button.
Task Setup Basics

Global Settings

Active Agent monitoring and collaboration tasks may be setup on several different levels. General or global information may be entered and saved for all tasks in the Settings window. These settings effect all future tasks and may include:

- a request to be informed of others on your network who have an interest in searches similar to the ones you are performing,
- the ability to choose whether or not you share information with others on your network about your monitoring tasks,
- the ability to limit the length of time a task is active,
- the convenience of entering a personalized reference note specific to a task, and
- the ability to choose a range of notification methods for your tasks.

Search Form Settings

Task information may be further refined using the Agent subtab available on each Search Form. These attributes supersede Global Settings applied in the Settings Window and are specific to the current search only. This information may include:

- an immediate option to determine who on your network is running exactly the same search you are currently running (Instant Collaboration),
- the ability to choose whether or not you share information with others on your network about a particular task,
When this global setting is changed, functionality is immediately changed on all Search Forms.

Add New Tasks

1. Click on a Search Tab Item and enter search information.

2. A Summary Table is displayed.

To begin the search, click on the Find button.

Figure 5: Add New Tasks

1. Click on a checkbox in the Agent Monitoring column (first column on the left) to select and automatically add a particular found entity to your task list.

2. Click on the Monitor future additions to this search item at the top of the table to receive an update that contains additional new or changed entities for the current search. Note that you may choose this option even if no matches are found in the current search.

Collaboration

Collaboration Levels

Global Settings: Privacy levels may be set in the Agent Settings window.

Search Form Settings: These attributes supersede options applied in the Settings window and are specific to the current search only.

Figure 6: Collaboration Levels

Note: The default Collaboration setting on ALL search forms for ALL users is Share With Everyone.

This requires you to make the conscious decision to Share With No one if so desired.
When this global setting is changed, functionality is immediately changed on all Search Forms.

Instant Collaboration

1. Click on a Search Tab item.

An appropriate Search Form is displayed.

2. Enter known search data in the displayed Search Form.

3. Click on the Agent Subtab.

4. Click on the Instant Collaboration button.

Receive information regarding members of your network who are interested in the same searches as you. If a match is found, information about User Name, Task Type, Share and Notification Levels is displayed.

Check Alerts

1. Click on the Alerts button on the Tool Bar to get Alerts available on your network.

2. Alternately click on the Agent menu bar option, then on the Alert Inbox item. The Agent Notifications window is displayed.

Note that when new (previously unviewed) Alert matches exist on your network, a number is displayed indicating the quantity of new Alerts available for viewing.

View Alert Messages

1. Click on the Alerts button on the Tool Bar to get available alerts.

2. Alternately click on the Agent menu bar option, then on the View Agent Tasks item.

The Agent Alert Messages summary table is displayed.
**What can I do with View Alert Messages?**

- **Sort Agent Alert Messages**  
  Click on a column-heading. Click on the same column-heading a second time to sort the displayed table in reverse order keying on the specific column. *Note that Messages can only be removed if you delete them.*

- **View Alert Message details**  
  Click on a Subject column link. An Alert Details window is displayed.

- **Delete Selected Messages**  
  Click on a checkbox in the Delete Messages column (first column). To delete all checked messages, click on the Delete Agent Task(s) button.
# Index

<table>
<thead>
<tr>
<th>Agent Settings, 7, 8</th>
<th>Notification Levels, 5, 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>available alerts, 6, 9</td>
<td>notifications, 5</td>
</tr>
<tr>
<td>Collaboration, 5, 8</td>
<td>Notify Users, 5</td>
</tr>
<tr>
<td>COPLINK Active Agent, 5</td>
<td>PDA, 5</td>
</tr>
<tr>
<td>Create, 5</td>
<td>Privacy Levels, 5</td>
</tr>
<tr>
<td>Display Agent Tasks item, 6</td>
<td>Search Form Settings, 7, 8</td>
</tr>
<tr>
<td>email, 5</td>
<td>Task Type, 9</td>
</tr>
<tr>
<td>Global Settings, 7, 8</td>
<td>User Name, 9</td>
</tr>
<tr>
<td>Instant Collaboration, 7, 9</td>
<td>View Alert Messages, 9, 10</td>
</tr>
<tr>
<td>Interesting Database Updates, 5</td>
<td>View Details, 6</td>
</tr>
<tr>
<td>monitor task, 5</td>
<td></td>
</tr>
</tbody>
</table>