

Operation guide: How to manage the Hold Request

1. Preparing for Hold Request setup

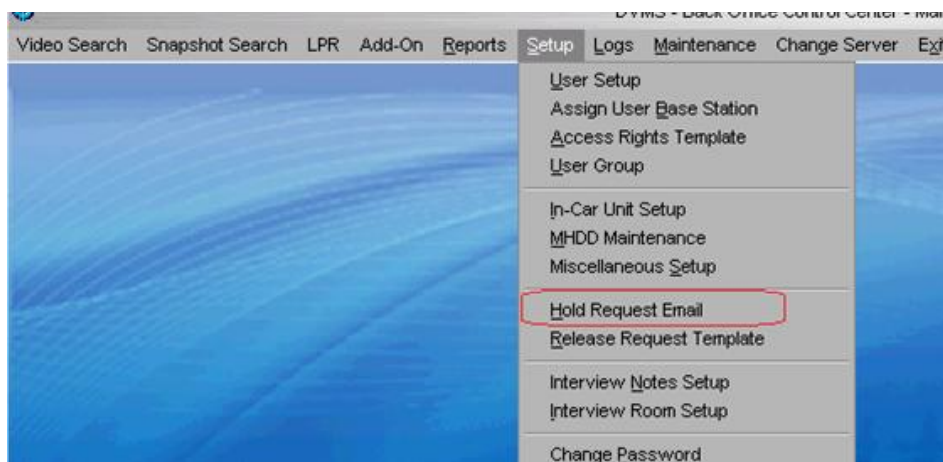
- a. Go to Maintenance and select Email Notification



- b. set up SMTP server and sender information.



- c.
- d. In the User Setup window, setup alert information for the Coban users who requested the hold.



- e. In the Hold Request Email window, setup contacts with email information for other users who requested the hold.

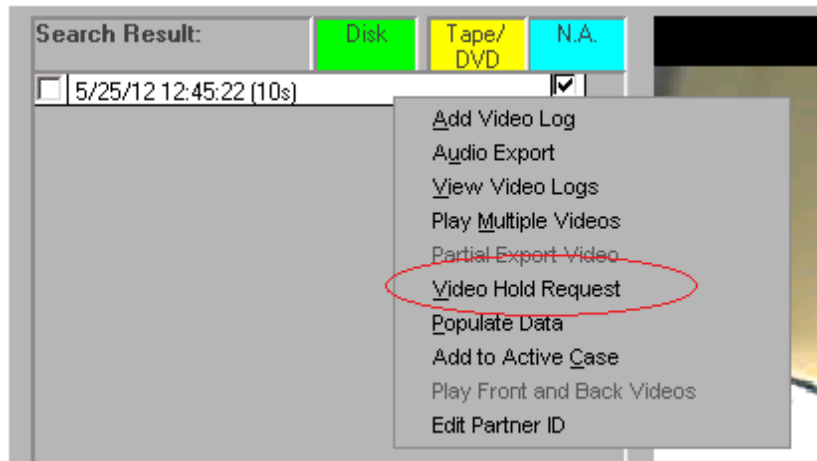
Name: Email:
Organization: Phone:
 Active

Fill in the Name, Email Address, Organization and phone # and save

Name: Email:
Organization: Phone:
 Active

2. Placing Hold Request on the videos

- a. In the Video Search Result window, right click on the video, select the Video Hold Request.



Video Hold Request

Hold Until: 12/16/2018 + Month + Year
 - Month - Year

Notes:

Requested By

Officer
 Partner
 Extra

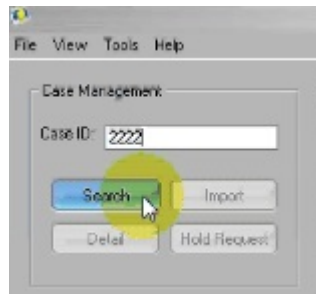
Extra Email: _____
 Note: Additional email separated by comma.

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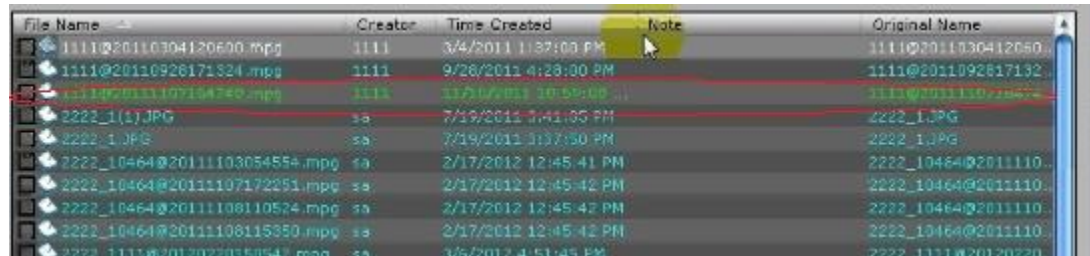
Save Exit

- b. Check contacts who requested to hold the video in the Requested By panel.
 - c. Specify extra emails separated by comma when needed.
 - d. Specify the expiration date, notes and click the Save.
 - e. Populate hold request will be prompted to you after you click the Save
 - i. Prompt for populating to other videos with same case ID.
 - ii. Prompt for adding the associated case IDs to the Active Case Management.
- 3. Releasing the hold on the video.**
- a. Uncheck the contacts who no longer wants to hold,
 - b. When all contacts on the Hold Request window are uncheck, the hold is released.
- 4. Emails due to be sent: emails will be sent to the hold requested users when videos are about to expire:**
- a. 1st email will be sent a day before expiration.
 - b. The subsequent emails will be sent 30 days after the last sent date.
 - c. All emails are sent to on hold users
 - d. On and after the 3rd email, also an email will be sent to administrators (From Address in the Email Notification window).
- 5. Hold Request for DPM**
- a. Go to Add-On on the menu bar and select DPM

b. Enter the case #



c. Select the videos, jpg or files for hold request



d. Once the videos, jpg or files is selected select hold request

