

MAKE THE
WORLD SEE

Milestone Systems

XProtect® Incident Manager 2023 R1

User manual



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This product may make use of third-party software for which specific terms and conditions may apply. When that is the case, you can find more information in the file `3rd_party_software_terms_and_conditions.txt` located in your Milestone system installation folder.

Supported VMS products and versions

This manual describes features supported by the following XProtect VMS products:

- XProtect Corporate
- XProtect Expert
- XProtect Professional+
- XProtect Express+

Milestone tests the features described in this manual with the above-mentioned XProtect VMS products in the current release version and the two previous release versions.

If new features are only supported by the current release version and not any previous release versions, you can find information about this in the feature descriptions.

Overview

This documentation and eLearning courses

This documentation describes how to gather strong evidence with the features in XProtect Incident Manager.

Milestone offers eLearning courses for all XProtect products. Visit the Milestone Learning Portal at <https://go.bluevolt.com/Milestone/Home/>.

To find the XProtect Incident Manager courses, search for **incident manager**. The course **Using XProtect Incident Manager** is for operators of XProtect Smart Client and the course **Configuring XProtect Incident Manager** is for administrators of XProtect Management Client.

XProtect Incident Manager

Milestone has developed add-on products that fully integrate with XProtect to give you extra functionality. Your XProtect license file controls the access to add-on products.



Available functionality depends on the system you are using. See the complete feature list, which is available on the product overview page on the Milestone website (<https://www.milestonesys.com/solutions/platform/product-index/>).

XProtect Incident Manager is a Milestone add-on that enables organizations to document incidents and combine them with sequence evidence (video and, potentially, audio) from the XProtect VMS.

Users of XProtect Incident Manager can save all the incident information in incident projects. From the incident projects, they can track the status and activities of each incident. In this way, the users can manage incidents effectively and easily share strong incident evidence, both internally with colleagues and externally with authorities.

XProtect Incident Manager helps organizations gain an overview and understanding of the incidents happening in the areas they survey. This knowledge enables the organizations to implement steps to minimize the chance that similar incidents happen in the future.

In XProtect Management Client, the administrators of an organization's XProtect VMS can define the available incident properties in XProtect Incident Manager to the organizations' needs. The operators of XProtect Smart Client start, save, and manage incident projects and add various information to the incident projects. This includes free text, incident properties that the administrators have defined, and sequences from the XProtect VMS. For full traceability, the XProtect VMS logs when administrators define and edit incident properties and when operators create and update the incident projects.

What's new?

In XProtect Incident Manager 2023 R1

- To comply with GDPR or other applicable laws concerning personal data, administrators of XProtect Management Client can now define a retention time for incident projects.

In XProtect Incident Manager 2022 R3

- The XProtect Incident Manager add-on is now also compatible with XProtect Expert, XProtect Professional+, and XProtect Express+ version 2022 R3 or later.
- XProtect Incident Manager can now show more than 10,000 incident projects.

In XProtect Incident Manager 2022 R2

- The first release of this add-on
- The XProtect Incident Manager add-on is compatible with XProtect Corporate version 2022 R2 and later and with XProtect Smart Client version 2022 R2 and later.

Operation

Documenting and managing incidents with XProtect Incident Manager

When the XProtect Incident Manager add-on is installed and configured, and the administrators of the VMS have given you the needed permissions, you can document and manage incidents in XProtect Smart Client and save all information in incidents projects.

On the **Incidents** tab, you can view and update your incident projects and manage your incidents. You typically add sequences and various textual information to your incident projects to document and prove what happened when an incident occurred.

For improved incident management, you can:

- Filter the list of incident projects to find the relevant incident project quickly
- See the status, type, start and end time, and description of the different incident projects
- Keep your incident projects updated with the latest actions and other development in the management of the incidents
- Generate reports and export the incident projects' sequences to share the evidence internally or externally

Incident projects and properties

When the administrators of the XProtect VMS have configured XProtect Incident Manager and have given you the necessary permissions, you can save all information about an incident in an incident project.

You can find all your saved incident projects on the **Incidents** tab. You can save as many incident projects as you want. There are 100 incident projects per page in the list, and the incident projects are sorted with the most recently created ones on the top. From the **Incidents** tab, you manage and update incident projects and share them with others through reports and exports.

The information you can add to and the properties you can define in incident projects are:

- Sequences with video and, potentially, audio from the XProtect VMS
- Incident properties like type, status, categories, and data elements
- Information like comments, descriptions, and information about calls.

The XProtect VMS administrators define what incident properties are available to assign to your incident projects. You can always add free text information and sequences from the XProtect VMS to the incident projects.

When you create a new incident project, you can define the incident type and give it a description. When the incident project is created, you typically want to add additional information. From the **Incidents** tab, you double-click the incident project to open it. Then you add and edit the different information and properties available on the various tabs. When needed, you can share the information in the incident projects with others by creating reports and exports.

Create incident projects

Creating incident projects

There are several ways of creating an incident project. Which one is best depends on the following:

- When you discover the incident.
- If you need to solve the ongoing situation on-site and have little to no time to create your incident project.
- If there are no sequences to add to the incident project.
- Your personal preference.

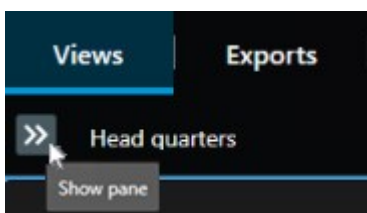


If you need the sequences and information in your incident project for a longer time than the retention times your administrator defined for sequences and incident projects, export your incident project and generate a report. See [Export an incident project on page 18](#) and [Create a report with incident project information on page 18](#).

Create an incident project in real time

If you notice an incident while it is ongoing and you don't need to personally solve the situation on-site, follow the following method to add sequences and document the incident.

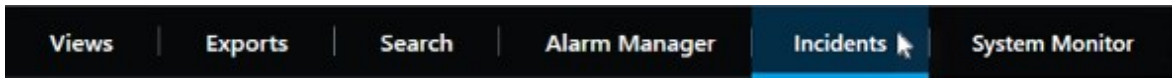
1. In live mode, select **Show pane**.



2. Under the **MIP plug-ins** pane and **Incidents**, select **Start incident project**, and XProtect Incident Manager starts collecting the sequences in the current view.
 - Optional. Change views to follow persons and objects related to the incident.
 - Optional. Call for assistance to solve the situation on-site.
3. When the incident has stopped and you don't need more evidence, select **Save incident project**.
4. Select the type of incident and give the incident project a description. Select **Save**.

To add more information to your new incident project:

1. Select the **Incidents** tab and double-click the incident project that you have just created to open it.



2. Fill in the needed data about the incident:

- On the **Main details** tab, select a status for the management of the incident.
- On the **Categories** tab, select and enter the different properties that the VMS administrator has defined for your organization.
- On the **Comments** tab, enter free text information about the incident.

If possible, write your comments so that the incident project is complete even without any sequences from the VMS.

- On the **Sequence list** tab, you can see all the sequences added to the incident project. Review if all sequences are relevant and remove those that aren't.
- On the **Calls** tab, add information about the calls you have made or received in connection with the incident.

3. Select **Save**.

If you want to add more sequences to your incident project, see [Add additional sequences to an incident project on page 14](#).



If you need the sequences and information in your incident project for a longer time than the retention times your administrator defined for sequences and incident projects, export your incident project and generate a report. See [Export an incident project on page 18](#) and [Create a report with incident project information on page 18](#).

If you prefer, you can use one of the other methods of creating incident projects. See [Create an incident project after an incident occurred on page 10](#) or [Create an incident project without video on page 13](#).

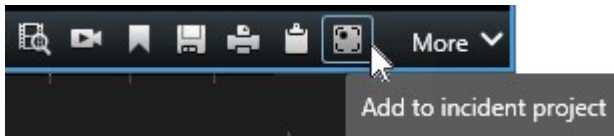
Create an incident project after an incident occurred

There are two ways of creating incident projects after the incident occurred.

- Add one or several sequences one by one, and then from the draft sequence list, save them to a new incident project. See [Add playback sequences to a new incident project on page 11](#).
- Add only one sequence and save it directly in a new incident project. See [Add one playback sequence to a new incident project on page 12](#).

Add playback sequences to a new incident project

1. In live or playback mode, select the **Add to incident project** icon in the bottom-right corner of the view item from which you want to add a sequence.



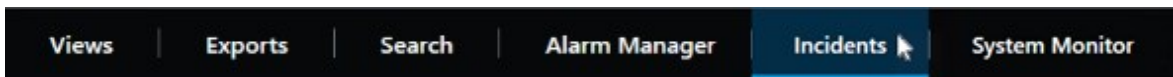
2. Select **Add to draft sequence list**.
3. Select **Select start time** and drag the timeline until you have found where the incident started.
4. Select **Add to incident project** again to continue with selecting the end time.
5. Select **Select end time** and drag the timeline until you have found where the incident ended.
6. Select **Add to incident project** again and select **OK**.

Repeat the previous steps as many times as needed to get all the relevant sequences for your incident project.

7. Select the **Add to incident project** icon and select **View draft sequence list**.
8. Select **Add all to new incident project**.
9. Select the type of incident and give the incident project a description. Select **Save**.

To add more information to your new incident project:

1. Select the **Incidents** tab and double-click the incident project that you have just created to open it.



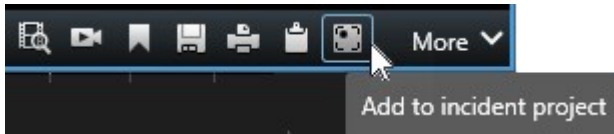
2. Fill in the needed data about the incident:
 - On the **Main details** tab, select a status for the management of the incident.
 - On the **Categories** tab, select and enter the different properties that the VMS administrator has defined for your organization.
 - On the **Comments** tab, enter free text information about the incident.
If possible, write your comments so that the incident project is complete even without any sequences from the VMS.
 - On the **Sequence list** tab, you can see all the sequences added to the incident project. Review if all sequences are relevant and remove those that aren't.
 - On the **Calls** tab, add information about the calls you have made or received in connection with the incident.

3. Select **Save**.

If you want to add more sequences to your incident project, see [Add additional sequences to an incident project on page 14](#).

Add one playback sequence to a new incident project

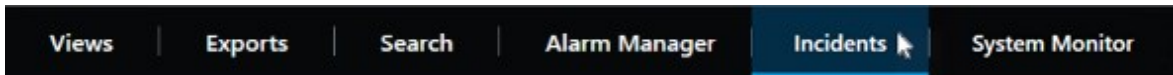
1. In live or playback mode, select the **Add to incident project** icon in the bottom-right corner of the view item from which you want to add a sequence.



2. Select **Add to new incident project**.
3. Select **Select start time** and drag the timeline until you have found where the incident started.
4. Select **Add to incident project** again to continue with selecting the end time.
5. Select **Select end time** and drag the timeline until you have found where the incident ended.
6. Select **Add to incident project** again and select **OK**.
7. Select the type of incident and give the incident project a description. Select **Save**.

To add more information to your new incident project:

1. Select the **Incidents** tab and double-click the incident project that you have just created to open it.



2. Fill in the needed data about the incident:
 - On the **Main details** tab, select a status for the management of the incident.
 - On the **Categories** tab, select and enter the different properties that the VMS administrator has defined for your organization.
 - On the **Comments** tab, enter free text information about the incident.
If possible, write your comments so that the incident project is complete even without any sequences from the VMS.
 - On the **Sequence list** tab, you can see all the sequences added to the incident project. Review if all sequences are relevant and remove those that aren't.
 - On the **Calls** tab, add information about the calls you have made or received in connection with the incident.
3. Select **Save**.

If you want to add more sequences to your incident project, see [Add additional sequences to an incident project on page 14](#).

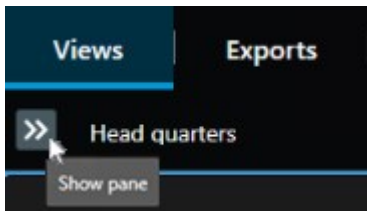


If you need the sequences and information in your incident project for a longer time than the retention times your administrator defined for sequences and incident projects, export your incident project and generate a report. See [Export an incident project on page 18](#) and [Create a report with incident project information on page 18](#).

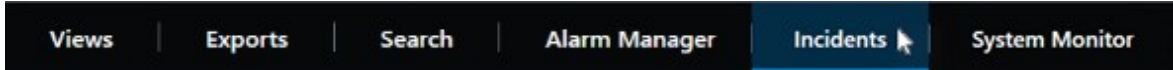
Create an incident project without video

If you prefer to start an incident project without sequences from the VMS, use the following method. Maybe you don't have time to add sequences now, or perhaps there are no sequences to add from the VMS, but you still want to document and manage the sequence-less incident together with your other incident projects in XProtect Smart Client. If there are sequences, you can always add them later.

1. In live mode, select **Show pane**.



2. Under the **MIP plug-ins** pane and **Incidents**, select **Create empty incident project**.
3. Select the **Incidents** tab and double-click the incident project that you have just created to open it.



4. Fill in the needed data about the incident:
 - On the **Main details** tab, select a status for the management of the incident.
 - On the **Categories** tab, select and enter the different properties that the VMS administrator has defined for your organization.
 - On the **Comments** tab, enter free text information about the incident.
If possible, write your comments so that the incident project is complete even without any sequences from the VMS.
 - On the **Sequence list** tab, you can see all the sequences added to the incident project. Review if all sequences are relevant and remove those that aren't.
 - On the **Calls** tab, add information about the calls you have made or received in connection with the incident.

5. Select **Save**.

If you want to add more sequences to your incident project, see [Add additional sequences to an incident project on page 14](#).



If you need the sequences and information in your incident project for a longer time than the retention times your administrator defined for sequences and incident projects, export your incident project and generate a report. See [Export an incident project on page 18](#) and [Create a report with incident project information on page 18](#).

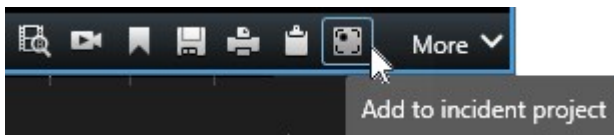
Edit incident projects

Add additional sequences to an incident project

If you have created an incident project in real time, you may want to add sequences that show what happened before the incident started.

Add one sequence at a time

1. In live or playback mode, select the **Add to incident project** icon in the bottom-right corner of the view item from which you want to add a sequence.



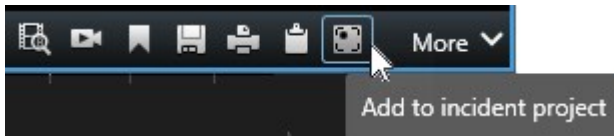
2. Select **Add to existing incident project**.
3. Select **Select start time** and drag the timeline until you have found where the incident started.
4. Select **Add to incident project** again to continue with selecting the end time.
5. Select **Select end time** and drag the timeline until you have found where the incident ended.
6. Select **Add to incident project** again and select **OK**.
7. Select the incident project to which you want to add the sequence.



If you can't find a specific incident project, you can use the filter options. See [Filter for incident projects on page 16](#).

Add several sequences

1. In live or playback mode, select the **Add to incident project** icon in the bottom-right corner of the view item from which you want to add a sequence.



2. Select **Add to draft sequence list**.
3. Select **Select start time** and drag the timeline until you have found where the incident started.
4. Select **Add to incident project** again to continue with selecting the end time.
5. Select **Select end time** and drag the timeline until you have found where the incident ended.
6. Select **Add to incident project** again and select **OK**.
7. Repeat the previous steps as many times as needed to get all the relevant sequences for your incident project.
8. Select the **Add to incident project** icon and select **View draft sequence list**.
9. Select the sequences in the draft sequence list that you want to add to your existing incident project and select **Add all to existing incident project**.
10. Select the incident project to which you want to add the sequence.



If you can't find a specific incident project, you can use the filter options. See [Filter for incident projects on page 16](#).

Change statuses, comments, and other incident properties

You typically want to keep existing incident projects updated to optimize incident management and document the latest development and information related to the incident.

Examples of when to update your incident project:

- The status of the incident management stage has changed, and therefore you update the status in your incident project too.
- You have made an additional call or received a new call about the incident, and therefore you add information about the call to the incident project.
- You have exported the incident project and therefore add a comment about where you saved the export on your organization's network.

To update your incident project:

1. Select the **Incidents** tab and double-click the incident project you want to update.



If you can't find a specific incident project, you can use the filter options. See [Filter for incident projects on page 16](#).

2. On the **Main details** tab, you can update the status of the incident management. You can also change the type of the incident, but typically this property doesn't change over time.

You can't change the **ID**, the **Created by**, or the **Start and end time** properties.

3. On the **Categories** tab, select and update relevant categories.
4. On the **Comments** tab, enter additional free text information about the incident.
5. On the **Calls** tab, add information about new calls you have made or received in connection with the incident.

Remove sequences from an incident project

If you have added irrelevant sequences to an incident project, you can remove them again.

1. Select the **Incidents** tab and double-click the incident project that you want to update.



If you can't find a specific incident project, you can use the filter options. See [Filter for incident projects on page 16](#).

2. On the **Sequence list** tab, select the sequence you want to remove.



If in doubt of having selected the correct sequence, verify it by selecting **View video**. See [View video in an incident project on page 17](#).

3. Select **Remove** and confirm the removal.

Filter for incident projects


To easily find an incident project, you can filter all your incident projects based on various information.

1. Select the **Incidents** tab.
2. Use one or more filters to find a specific incident project:
 - Sequences in an incident project starting after or ending before a defined time
 - The time range of sequences in an incident project

- The ID of an incident project
 - Text in the description of an incident project
3. Select the incident project.

View video in an incident project

You and your colleagues can view the video added to an incident project. For example, to remind yourself of the incident, to see it for the first time, or compare the evidence in an old incident project with those in a new and perhaps related incident project.

1. Select the **Incidents** tab and double-click the incident project with the video that you want to view.
2. Select the **Sequence list** tab.
3. Select the **View video** button.
4. From the list of sequences in the bottom-right corner of the window, select the sequence you want to view.
5. Select  to play the video forward.

View user activity log entries for an incident project

The VMS writes log entries for every incident project when you or others make changes to an incident project. The log entries list what has been changed, by whom, and when the change was saved.

1. Select the **Incidents** tab and double-click the incident project that you want to open.



If you can't find a specific incident project, you can use the filter options. See [Filter for incident projects on page 16](#).

2. Select the **Activity logs** tab.

The activity log entries show information about when a user:

- Creates, edits, and opens an incident project.
 - Applies and changes values for types, statuses, and categories.
 - Adds, edits, and deletes comments or information about calls.
 - Sends an incident project for export.
 - Generates and prints an incident project report.
 - Adds and removes sequences.
3. Review the activity log entries.

Create a report with incident project information

You can create a report with all the textual information added to an incident project.

Incident projects are automatically deleted when the retention time for them has been reached. Therefore, if you need to keep the textual information in incident projects as evidence for a longer period, you must generate a report before the retention time expires.

When the report is created, you can print and save it. You can send the report to colleagues, the police, or others together with an export of the incident project. An export contains the sequences added to the incident project. See [Export an incident project on page 18](#).

1. Select the **Incidents** tab.
2. Select the incident project from which you want to generate a report.
3. Select **Create report**.
4. By default, all user names are hidden in the report. Select **Show user names** to see the names.
5. To print or save the report, select **Print**.

The setting of **Show user names** determines whether user names are hidden or shown in the printed or saved report.

Export an incident project

Incident projects and sequences are automatically deleted when the retention times for them have been reached. Therefore, if you need the video evidence for a longer period, export the projects before the retention times expire.

When you send an incident project for export, all sequences from the incident project are inserted into the **Export list** on the **Exports** tab. You can use all the settings available on the **Export** tab when exporting the sequences from the incident project.

For more information about the export settings, see also the user manual for XProtect Smart Client (<https://doc.milestonesys.com/2023r1/en-US/portal/htm/chapter-page-sc-user-manual.htm>).

To export sequences added to an incident project:

1. Select the **Incidents** tab.
2. Select the incident project you want to export.
3. Select **Send for export**.

The **Export** tab is shown, and all sequences from the incident project are added to the **Export list**.

4. Select the preferred format and other settings for your export.

For more information about how to create video evidence, see also the user manual for XProtect Smart Client (<https://doc.milestonesys.com/2023r1/en-US/portal/htm/chapter-page-sc-user-manual.htm>).

When saving or sharing your export, you would typically also save or share a report with all the textual information added to the same incident project. See [Create a report with incident project information on page 18](#).

Delete an incident project

If you no longer need to keep an incident project, you can delete it. You can't undo the deletion.

1. Select the **Incidents** tab.
2. Select the incident project that you want to delete.
3. Select **Delete** and confirm the deletion.



If you are in doubt about deleting an incident project, you can open it and review its information before deleting it. Also, view one or more video sequences to ensure that you have selected the correct incident project for deletion.

Troubleshooting

XProtect Incident Manager troubleshooting

Messages in XProtect Smart Client

Cannot add sequence. Try again later.

Your connection to the VMS servers is unstable. If the problem persists, contact your system administrators.

System administrators: check if the network and all VMS servers and services are running.

Cannot create incident project. Try again later.

Your connection to the VMS servers is unstable. If the problem persists, contact your system administrators.

System administrators: check if the network and all VMS servers and services are running.

Cannot generate report. Try again later.

There can be two reasons for this message:

- a. Your connection to the VMS servers is unstable. If the problem persists, contact your system administrators.

System administrators: check if the network and all VMS servers and services are running.
- b. The list of incident projects and lists of sequences are not updated in real time. So, if you have had one of these lists open for a while and another XProtect Smart Client operator has deleted items from the list, you will see this message if you try to edit the deleted list item or elements included in the deleted list item.

For example, another operator has deleted an incident project while you had the list of incident projects open. You can still see the deleted incident project in the list on your computer, but you will get this error message if you try to generate a report.

Cannot perform this action. Please refresh the list.

The list of incident projects and lists of sequences are not updated in real time. So, if you have had one of these lists open for a while and another XProtect Smart Client operator has deleted items from the list, you will see this message if you also try to delete or save the already deleted incident project.

Cannot perform this action. Try again later.

Your connection to the VMS servers is unstable. If the problem persists, contact your system administrators.

System administrators: check if the network and all VMS servers and services are running.

Cannot remove all sequences. Try again later.

Your connection to the VMS servers is unstable. If the problem persists, contact your system administrators.

System administrators: check if the network and all VMS servers and services are running.

Cannot save [x]. Try again later.

This message is shown in connection with trying to save a comment, information about a call, or another setting. There can be two reasons for this message:

- a. Your connection to the VMS servers is unstable. If the problem persists, contact your system administrators.

System administrators: check if the network and all VMS servers and services are running.

- b. The list of incident projects and lists of sequences are not updated in real time. So, if you have had one of these lists open for a while and another XProtect Smart Client operator has deleted items from the list, you will see this message if you try to edit the deleted list item or elements included in the deleted list item.

For example, another operator has deleted an incident project while you had the list of incident projects open. You can still open the deleted incident project from your computer, but if you try to add or edit a comment, information about a call, or change the incident status, or other, you will get this error message.

Permission denied.

Your system administrators haven't given you permission to use a feature. Contact your system administrators if you can't complete your tasks without this feature.

Report generated but not all information is included.

During the generation of the report, connection to the VMS servers or services was lost. The report does not contain all information from the incident project. Try to generate the report again.

This information is not available to you.

Your system administrators haven't given you permission to use a feature. Contact your system administrators if you can't complete your tasks without this feature.

Glossary

A

activity logs

Log entries added by the VMS that describe users' activities in the VMS.

D

draft sequence list

A temporary list of uninterrupted periods of recordings with video and possibly audio. The user adds the different sequences to the draft sequence list as the first step of 1) creating a new incident project and adding the sequences to the new project or 2) adding the sequences to an existing incident project.

I

incident

A negative or dangerous act or situation that could lead to damage to, loss of, or disruption to an organization's staff, properties, operations, services, or functions.

incident category

Optional details about an incident. With categories, you can add more granular information about an incident. Examples of incident categories are: the location of the incident, the number of accomplices, and if the authorities were called.

incident management

Activities of an organization to identify, document, handle, and analyze incidents in order to rectify situations with negative implications quickly and to prevent future re-occurrences. See also incident.

incident project

A project in which the data about an incident is stored. The data can be video, audio, comments, incident categories, and other data. The operator adds the comments and selects relevant incident characteristics to an incident project in XProtect Smart Client. In Management Client, the system administrator defines which incident characteristics are available for the operators when creating incident projects.

incident properties

A wide range of data you can define for an incident project: categories, status, type, and others

incident status

A detail about an incident. With incident statuses, you can track the investigation progress of incidents. Examples of incident statuses are: New, In progress, On hold, Closed

incident type

A detail about an incident. With a type, you categorize what kind of incident it is. Examples of incident types are: Theft, Car accident, Trespassing.

S

sequence list

A list of uninterrupted periods of recordings with video and possibly audio originating from the XProtect VMS.

X

XProtect Incident Manager

Product available as an add-on to XProtect surveillance systems. With XProtect Incident Manager, you can document and manage incidents within XProtect Smart Client.



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About Milestone

Milestone Systems is a leading provider of open platform video management software; technology that helps the world see how to ensure safety, protect assets and increase business efficiency. Milestone Systems enables an open platform community that drives collaboration and innovation in the development and use of network video technology, with reliable and scalable solutions that are proven in more than 150,000 sites worldwide. Founded in 1998, Milestone Systems is a stand-alone company in the Canon Group. For more information, visit <https://www.milestonesys.com/>.

