

Case Tally Definitions

Case Tally Definitions

Purpose and when to use this record

Define a countable case outcome or activity and the category under which it is reported.

At a glance

- **Identify it by: Name.**
- **Check its business context: Category.**
- **Why care:** Use the agency's approved terminology and access policy. Preserve dates, responsible personnel, case links, and audit history because these records may support official reporting or custody review.
- **Why care:** Availability and publication flags affect future use without erasing history. Prefer disabling an obsolete setup record when existing transactions still refer to it.

Before you begin

You need the Brisk permission for the action you are taking on case tally definitions. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Have valid **Category** records ready first. Those selections determine where this Case Tally Definition belongs and which later screens can find it.

Create a Case Tally Definition

Mon, Aug 10, 2026

Search Here Search For...

My site > Law Enforcement > Case Tally Definition List > New Case Tally Definition

Save Cancel < Previous Next >

Case Tally Definition Entry - New Case Tally Definition

Name Category

Sort Order Currency ☐

Active ☒

The Case Tally Definitions create screen in the Brisk documentation demo.

Create a Case Tally Definition only when the existing choices do not represent the policy or classification you need. Near-duplicate setup values split reporting and make later selection harder.

1. Select the business context first: **Category**.
2. Enter the required identifying and operational values: **Name**, and **Category**.
3. Review **Currency**, and **Active** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Case Tally Definition, then confirm **Name** on its detail page before continuing.

After saving: Open **Case Tallies** and confirm the Case Tally Definition appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Delete a Case Tally Definition

Delete this Case Tally Definition only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

If the record is merely obsolete, use **Active** to remove it from future use while preserving existing references.

Before confirming, check for related **Case Tallies**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Name**. After confirmation, return to the Case Tally Definitions list and make sure only the intended Case Tally Definition was removed.

Review Case Tally Definition details

Use the detail page as the shared record of what this Case Tally Definition currently means. Verify **Active** before relying on it for a decision.

Follow **Category** to determine whether the issue is on this Case Tally Definition or on one of those linked records.

Next check: Open **Case Tallies** and confirm the Case Tally Definition appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

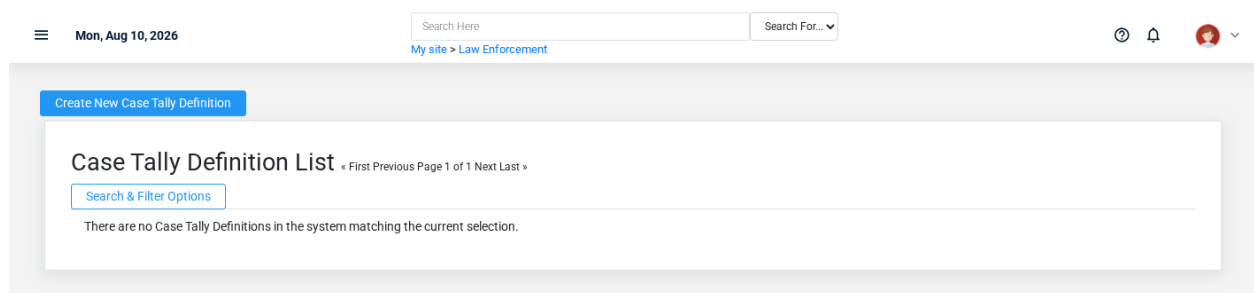
Edit an existing Case Tally Definition

Edit this Case Tally Definition when the underlying policy or classification changed. First determine whether historical transactions should retain the old value; if so, deactivate the old choice and create a new one.

1. Open the detail page. Compare **Category** with the supporting document or approved request.
2. Recheck **Active**. These values are most likely to change case history, custody, dispatch, official reporting, or audit review.
3. Save the change, return to the list, and confirm that the Case Tally Definition now appears under the expected **Active**.

After the change: Open **Case Tallies** and confirm the Case Tally Definition appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Find and review case tally definitions



The Case Tally Definitions list screen in the Brisk documentation demo.

Use the Case Tally Definitions list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Category**.

Open the Case Tally Definition whose **Name** match the task. If it is missing, clear the list filters and recheck **Active** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 5 user-relevant fields for this Case Tally Definition, including 1 linked-record selection and 0 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Name	Yes	Sets the name of this tally.
Category	Yes	The category associated with this case tally definition.
Sort Order	No	Sets the order that this tally appears within its category.
Currency	No	If enabled, this tally will be a dollar amount on reports.
Active	No	If this field is unchecked, this definition will no longer appear in reports.

What happens next

Open **Case Tallies** and confirm the Case Tally Definition appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Name**, and **Category** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The record saved but is not available where expected:** Recheck **Active**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **Category** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.