



Release Notes – 6.3.3

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RELEASE NOTES – 6.3.3

Release 6.3.2 was withdrawn due to an incorrect change of behaviour affecting conditional attributes. Release 6.3.3 fixes the issue and replaces Release 6.3.2. Similarly, release documentation for 6.3.2 has been withdrawn and replaced by Release Notes - 6.3.3.

These release notes explain the new features available in the 6.3.3 version of Jade Investigations Case Management (ICM).

They also explain a few minor issues we found during rigorous product testing.



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Close All Forms Except the One Selected

You can close all forms except the one you're looking at.

This is useful if you have too many forms open and you want to close the ones you don't need open any more.

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Managing Cases

When you create a case, any phases or default case notes your ICM administrator has set up will automatically be included.

This saves you creating phases and case notes manually each time you create a case.

It also promotes consistency within your organisation.

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Default Case Notes for New Cases

Your administrator can create default case notes for each type of case your organisation uses.

These will automatically be added to a new case when you create one.

You can create, edit, and delete the default case notes that are automatically available when you create a new case.

A row will be highlighted in yellow if a type of case note isn't usually allowed for that type of case.

This is just a warning for your reference. You can still include the case note.

Ø	Mortgage Frau	d Invest	gation Entity Type	Details	Icons	Entity types	Security	Options	Format guide	Default case i	notes >	
Defa	ult case notes											
	Туре		Title		Descript	tion						
1	General Case Note		Default case note: General Case Note		Remem	ber to complete	the followin	g: Do	this Do that	Don't do this	Hen	
2	Management / Critic	cal Decision	Default case note: Management / Critica	l Decision	Importa	nt Decisions:		Managen	nent Actions:			
3	Forensic Note		Default Case Note: Forensic Note		Forensio	Considerations	s: XYZ	ABC				
4	Risk Assessment		Default Case Note: Risk Assessment		Risk	Assessment Tab	ole R	isk Descrip	tion Mitigation			
4											•	
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Title		Default cas	e note: General Case Note]
Desc	Inite Default case note: General Case Note Description Remember to complete the following: • Do this • Do this • Do that • Don't do this Here are some more things to think about 1. Some thing 2. Some other things 3. Even more things											
									New	Apply	Delete	
									Save	Delete	Clóse	l

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If a regular user creates a new case for the type of case an admin user has created default cases notes for, the default case notes will show under **Contents** > **Log** for the new saved case.

	ortga	ge Fraud In	vestigati	on [l	JRN	: MI	FI-9] Details Contents E	Entities Access Commen	ts (0)	Threads	Disclosure >>
Conten	its										
Log	Pinned	Threads Tas	ks Phases	Line	s of E	nquir	TY				C [+ ≡
URN	Ŧ	Reported Date		Кеу Т	Туре	#	Title	Creator	Status	Disclosure Excluded	Disclo Signed
56	12	2/10/2021	11:58		Ð	0	[Draft] Default Case Note: Forensic Note	Steve ANDERSON (SJA)			
10	12	2/10/2021	11:58		₽	0	[Draft] Default case note: Management / Critical Decis	ion Steve ANDERSON (SJA)			
GCN/18	8919 12	2/10/2021	11:58		Ð	0	[Draft] Default case note: General Case Note	Steve ANDERSON (SJA)			
RSK202	21-3 12	2/10/2021	11:58		B	0	[Draft] Default Case Note: Risk Assessment	Steve ANDERSON (SJA)			
Details	5										
Fitle		Default Case No	te: Risk Asse	essmen	nt			Additional Details Attributes			•
Title Descrip	ition	Default Case No Risk Assessme	te: Risk Asse Int Table	essmen	nt		A	Additional Details Attributes			4
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Title Descrip	tion	Default Case No Risk Assessme Risk L2/10/2021 11:5	te: Risk Asse Int Table	essmen	De	escri	ption Mitigation	Additional Details Attributes			• • •

Default Phases for New Cases

When you create a new case, any phases your administrator has set up will be automatically be included for that type of case.

This means case officers no longer need to select phases manually when they create a new case.

To see any default phases your administrator has set up:

- 1. Create a new case.
- 2. Select the Overflow >>> tab > Select Case Admin.
- 3. Select the Phases subtab.

You'll see the default phases in the **Selected** pane.

Investigation File [URN: CASE/2021-14]			Details	Contents	Entities
Case Admin Alerts Phases Lines of Enquiry					
Phases Beginining Investigation		Selected	a Investia	ation	
Canvassing		Phase I			
Phase I	<pre></pre>	Phase II			
Phase II		Phase III			
Phase III					

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Searching

You can cancel any search you've started and export a selection of your search results.

Cancel Any Search

You can cancel any search you've started.

You might want to do this if the search is taking too long.

Previously you could only cancel a search for a tangible entity.

🗵 Searching		×
Processing	Checking Results Cancel	357

Export Selected Search Results

You can export a selection of your search results for external analysis.

For example, your search might return several results. But you might only be interested in analysing some of them.

Previously you could export all your search results, but not a selection of them. Now both options are available.

To export a selection of your search results:

- 1. Do a search.
- 2. Use EITHER of these methods to select the search results you want to export:
 - Press Shift+click
 - Press Ctrl+click
- 3. Select Export.

	rson Search	Standard	Attributes Advanced	Thesaurus Scope Active Search Stored Search
Standar	d criteria			
Search w	ords *			Search
	Use Keyword 👻 🗌 Any words	Show deleted		
Eatity UD				
Entity OK	N FER			
Addition	al criteria 🔻			
Results	(383) No Access Results (702)		=	Additional detail
▲ URN	Surname	Given 1	Given 2	Limited release
PER-47	Swanson	Ron		Case URN : CASE/2013-38
PER-48	FREEMAN	Observe		Case Officer to contact : HOLMES, Shirley [Deactivated]
PER-51	kyan ANDREW	Zack		·,
PEK-52	ANDREW	Zack		
DED-54	Watson	lobo		
DED-59	SMITH	Christopher		
PER-60	Barry	loe		
PER-61	STEVENSON	Jess		
PER-62	SMITH	Ricky		
PER-63	NIXON	Joshua		
PER-64	WILLIAMS	Kate		
PER-65	CROSS	Chris		
PER-66	SMITH	Roger		
PER-67	JONES	Jasper	Jimmie2	
PER-80	THOMPSON	Peter	Wilson	
PER-90	ANDERSON	Steve		
PER-95	EndOfSprint#1			
PER-98	ANDREWS	Fred	Peter	
PER-99	JONSON	Gerald		
(TT 100	10150	• 1	,*	
\star 🛛 Dia	gram	Sa	ve (active search) Sav	e (stored search) Export Select Close

Admin Options

The 6.3.3 release includes the following changes for admin users:

• You can set up default case notes and phases for each type of case your organisation uses.

This saves regular users setting these up manually each time they create a case and it promotes consistency within your organisation.

- It's easier to match and merge duplicate entities.
- Conditional attributes no longer have to be multiple.
- Offence codes no longer have to be unique everywhere.

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Create a Default Set of Case Notes

To create a default set of case notes for a type of case:

- 1. Select Admin > Entity Definition > Types.
- 2. Choose a type of case entity from the Selected panel.



- 3. Select Edit.
- 4. Select the Default case notes tab.
- 5. Create the default case notes for this type of case.
- 6. Save your changes.

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This example shows a case entity type for a mortgage fraud investigation.

ø	Mortgage Frau	d Investi	gation Entity Type	Details	Icons	Entity types	Security	Options	Format guide	Default case	notes :>
Def	ault case notes										
	Type Title		Descrip	tion							
1	General Case Note		Default case note: General Case Note		Remem	ber to complete	the followin	g: Do	this Do that	Don't do this	Her
2	Management / Critic	al Decision	Default case note: Management / Critical	Decision	Importa	nt Decisions:		Managen	nent Actions:		
3	Forensic Note		Default Case Note: Forensic Note	Default Case Note: Forensic Note F		Considerations	s: XYZ	ABC			
4	Risk Assessment		Default Case Note: Risk Assessment		Risk	Assessment Tab	ole Ri	isk Descrip	tion Mitigation		
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Cas	e note entity type	General Ca	se Note		-						
Title		Default cas	e note: General Case Note								
Des	cription	Rememb	er to complete the following:								
	Description Remember to complete the following: • Do this • Do that • Don't do this Here are some more things to think about 1. Some thing 2. Some other thing 3. Even more things										
									New	Apply	Delete
									Save	Delete	Close

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Set up Default Phases for a Type of Case

- 1. Select Admin > Entity Definition > Types.
- 2. Choose a type of case from the Selected panel.



- 3. Select Edit.
- 4. Select the **Options** tab.

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5. To choose which phases you want automatically included in new cases, move phases from the **Available** panel to the **Selected** panel.

elect and sequence entity types		
 Vailable Case File Case File Case test Documentation Case Note Entity Incident Report Information Report Task Task Result Brief of Evidence Disclosure Item Property Report Property Item Brief of Evidence Oxfence Brief of Evidence Oxfence Brief of Evidence Oxfence Brief of Evidence Common Approximation Brief of Evidence Oxfence Brief of Evidence Oxfence Brief of Evidence Common Approximation Brief of Evidence Approximation Brief of Evidence Approximation 	Selected Selected Brief of Evidence Defendant Brief of Evidence Exhibit Brief of Evidence Other Disclosable Brief of Evidence Victim Brief of Evidence Victim Brief of Evidence Victims Brief of Evidence Victims Brief of Evidence Administrative Document Brief of Evidence Administrative Document Disclosure Index Disclosure Index Incident Report Incident Report Property Item Property Item Case File Case File	=

6. Save your changes.

Regular users will see these phases when they create a new case for this type of case note.

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Easily Match and Merge Duplicate Entities

A Once you've merged entities, you can't undo this.

A Make sure you're certain about a merge before you proceed.

- 1. Drag and drop the same type of entity onto the Master or Suspected Duplicate panel.
- 2. Select Merge.
- 3. Select **Confirm** to proceed.

		ravourites of recent list					
Master		■ Suspected Du	Suspected Duplicate				
ttribute	Value	Attribute	Value				
RN	EV-65	URN	EV-2				
hort desc	FA Cup Final	Short desc	Busker Event				
escription	FA Cup Final	Description	Busker Event				
ctive	Yes	Active	Yes				
tart date	21/05/2016	Start date	Unknown				

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Offence Codes No Longer Need to Be Globally Unique

Offence codes only need to be unique within the Offence Act they belong to.

Previously they had to be unique everywhere.

Offence Acts
Select and enter details below
Description
NZ Anti-Money Laundering and Countering Financing of Terrorism Amendment Act 2017
NZ Crimes Act 1901
NZ Crimes Act 1957
NZ Customs Act 1901
NZ Quarantine Act 1902
Offence Act 1
Description NZ Anti-Money Laundering and Countering Financing of Terrorism Amendment Act 201
Deactivated
Offence Codes Anti-Money Laundering Counter Financing of Terrorism

Minor Issues Resolved in 6.3.2

The 6.3.2 release includes fixes for the following minor issues:

Previously	Now
If there was only one entity in a case note, you couldn't open that entity from the case note.	You can.
Your password could be longer than the password length specified by your ICM administrator.	You can't create a password that's longer than the length specified.
When you loaded a configuration, some of the entity uniqueness settings were left out.	These settings are retained.
If you were doing a keyword search for multi- byte languages—in Thailand, for example— ICM was using a partial set of keywords to match entities.	ICM uses all the keywords you've specified for the search.

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