

jade<sup>™</sup>



# Release Notes - 6.3.1

These release notes explain the new features available in the 6.3.1 release of Jade Investigations Case Management (ICM).

They include a few minor issues we found during rigorous product testing, which we've resolved.





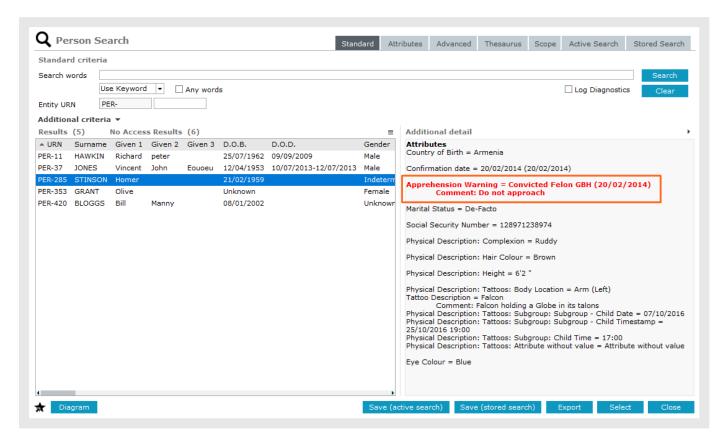
# **Managing Entities**

It's easier to manage entities in this release.

## Easily See Warning Attributes when Searching for Entities

For entity search results, when you're looking at the additional details for an entity, the warning attributes show in **bold red text**.

This makes it easier to see if there are any warnings.





## Flag Important Entities in a Source Document

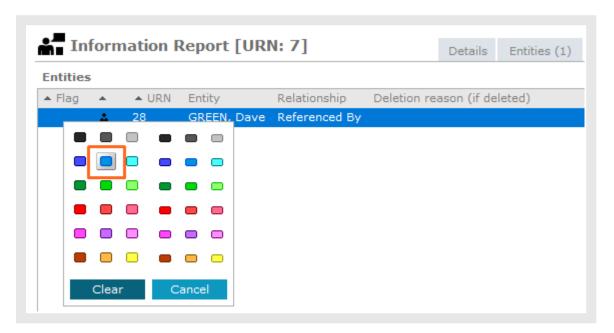
You can flag an entity with a coloured marker.

This is useful if you have lots of entities for a case note.

Flagging the important ones with a colour makes it easier to see which ones you need to focus on.

To flag an entity as important:

- 1. Open a source document.
- 2. Select the Entities tab.
- 3. Select an entity in the first panel.
- 4. Position your cursor below the Flag column > Select a colour from the pallet.



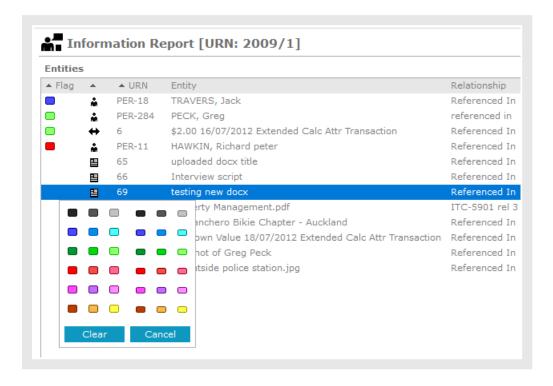
You can also sort entities according to their flags.

This is useful if you want to see flagged entities at the top, for example.



In the following example, entities are sorted on three levels according to:

- Coloured marker
- Entity type (icon)
- URN



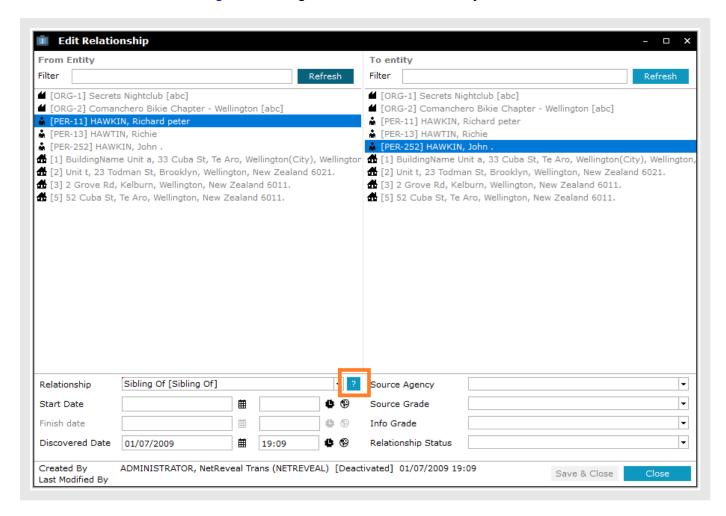


# Improve Data Consistency for Tangible Entities

When you edit tangible entity relationships, there's a Help icon beside the **Relationship** dropdown.

Regular users can select this icon for guidance on how to fill out the data.

Admin users can create the guidance regular users see when they select this icon.

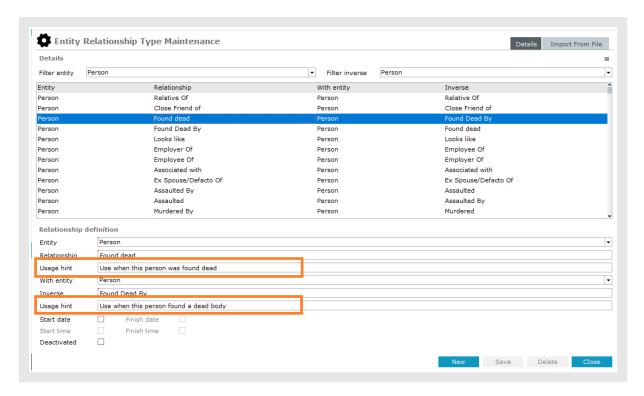




## Create Usage Hints for Types of Entity Relationships

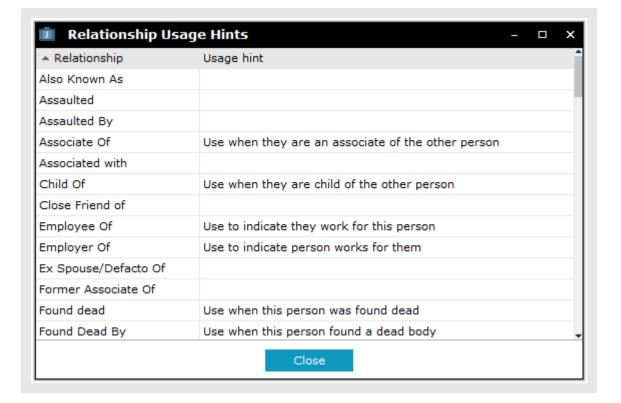
If you're an admin user, you can customise the guidance shown in the Help icon tooltips for each type of relationship:

- 1. Select Admin > Entity Definition > Relationships or Admin > Entity Definition > Types.
- 2. Select and open a tangible entity type, for example a person.
- 3. Select the **Relationships** tab.
- 4. Enter usage hints for the highlighted relationship and its inverse.



If no hint is defined for a relationship, the column will be empty for that row in the table.







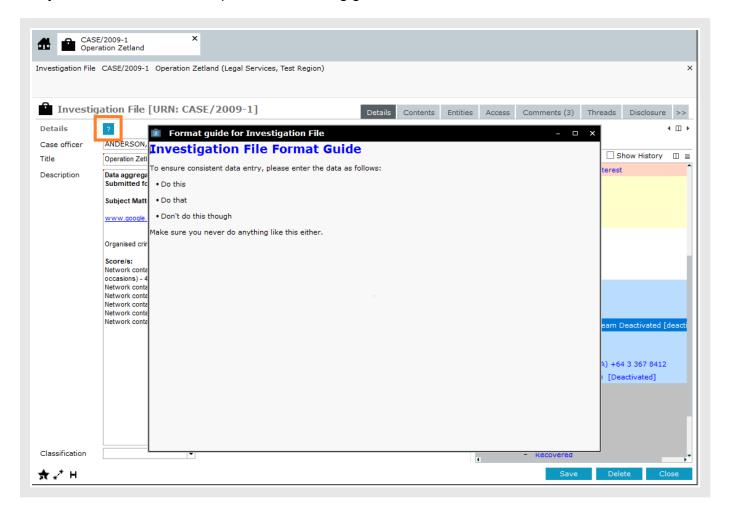
## Specify How You Want Data Added for Entity Types

Admin users can create formatting guides to show how they want data entered for each type of entity.

This encourages consistent data entry within your organisation.

If an admin user has created a formatting guide for an entity, when a regular user creates or edits an entity, they'll see a Help icon button beside the **Details** label.

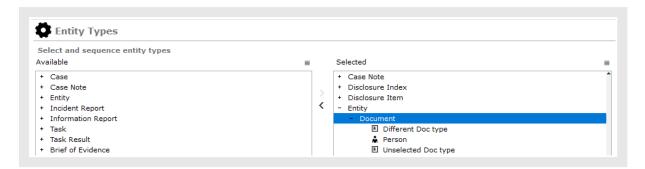
They can select this icon to open the formatting guide.



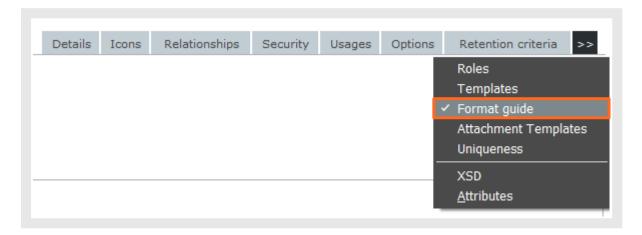


## Create a Formatting Guide for a Type of Entity

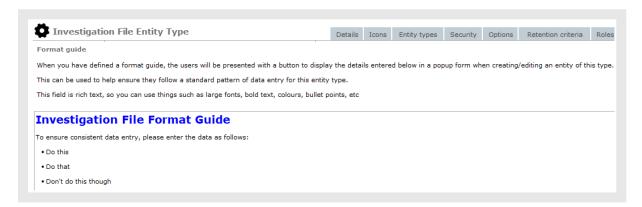
- 1. Select Admin > Entity Definition > Types.
- 2. Select and open a type of entity from the **Selected** pane.



3. Select the Overflow >> tab > Select Format guide.



4. Enter and format text in the field provided.





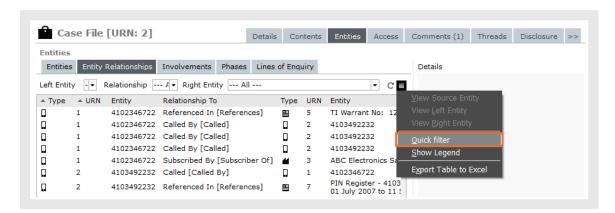
# Easily Find Entity Relationships Within a Case

When you open a case, you can use a quick filter to easily find an entity relationship within the case.

#### To display the quick filter:

- 1. Open a case.
- 2. Select the Entities tab.
- 3. Select the Entity Relationships subtab.
- 4. Use EITHER of these methods to display the quick filter:
  - Press Ctrl+F.
  - Select the Options 

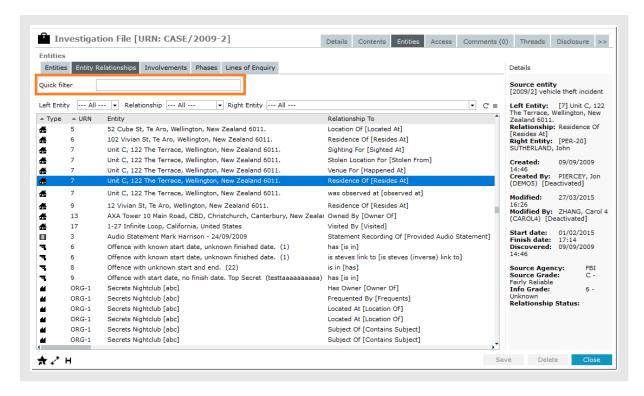
    icon > Select Quick Filter.



- 5. Enter your search text in the **Quick filter** field.
- 6. Press Enter.



You'll see rows containing your search terms in the list of entity-to-entity relationships.



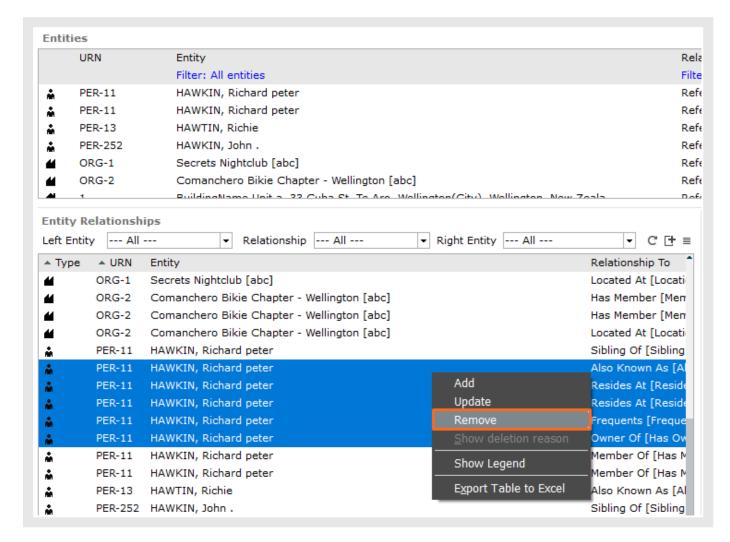


## Delete Several Entity Relationships at Once

You can select and remove more than one tangible entity-to-entity relationship at a time.

You can also reinstate several relationships at once.

This is saves you time and is especially useful if you've bulk-loaded entities incorrectly.





### Save all Entities as a Draft

When you're working on an entity, you can mark it as a draft and fill out the attributes later.

This is useful if you don't know what the attributes are yet and you want to fill them out later.

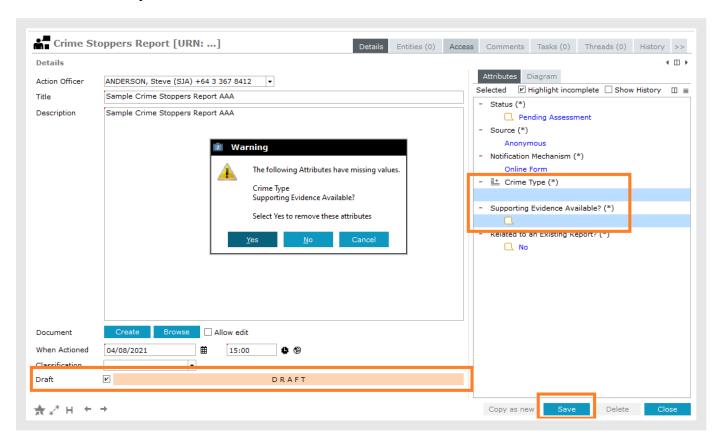
You can save any type of entity as a draft, including cases, source documents, and tangible entities (for example a person or location).

If you try to save a draft entity that has unpopulated attributes, you'll be prompted to confirm you want to remove these attributes.

In the following example, Crime Type and Supporting Evidence Available are required attributes.

But you can save the entity as a draft if you select the **Draft** checkbox.

Conversely, if you deselect the **Draft** checkbox, you'll need to fill out all required attributes before you can save the entity.





## It's Easier to Read Long Numbers for Entity Attributes

For countries with a devalued currency, numerical attributes contained long numbers.

These were hard to read and were often in error because you couldn't easily see what the number was.

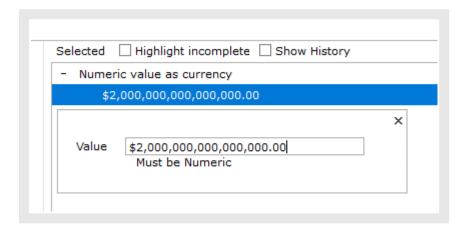
For example, when someone in Thailand recorded a value of \$600,000,000, it appeared as 600000000 in the attribute.

This made it difficult to detect mistakes.

If you're an admin user you can now enable the **Treat as currency** option.

If you do this, ICM automatically formats the numeric value as a currency.

It adds the currency symbol and separates the zeros to improve readability.



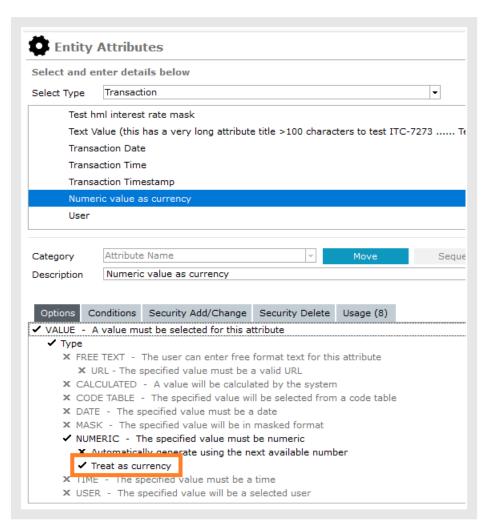
#### If you enable the Treat as currency option:

- This makes the data type for the text box currency
- The value is restricted to two decimal places
- The currency separator will be appropriate for the location
- You can enter the currency symbol for the location if you want to



## Make Long Numbers Easier to Read

- 1. Select Admin > Entity Definition > Attributes.
- 2. Select a type of entity attribute in the field provided.
- 3. Select the **Options** tab.
- 4. Under the **NUMERIC** value, enable the **Treat as currency** option.





# **Managing Property Items**

It's easier to manage property items in this release.

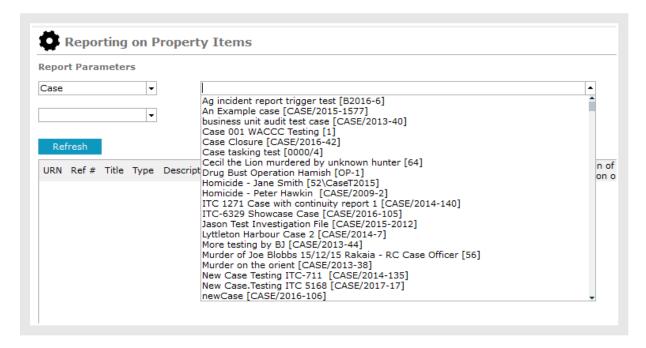
## Easily Find a Case When Reporting on Property Items

When you're reporting on property items, the case list is easier to read.

The case titles are listed alphabetically, with the URN as a suffix.

#### To see this change:

- 1. Select Property > Reporting > Property Items.
- 2. Select Case from the drop-down list.
- 3. Open the case list.





# Option to Include Closed Cases When Recording a Continuity or Action for a Property Item

When you're searching for a case that you want to record a Continuity or Action for, you have the option to include closed cases.

Closed cases are excluded by default because this is the most common use case.

#### To include closed cases:

- 1. Select Property > Record > Continuity Property.
- 2. For the Search By radio buttons, select Case.



3. Select Include closed cases.



4. Select Search.



# New English Language Spellchecker

If you're in an English language region, you can switch on the spellchecker and correct spelling mistakes as you type.

This improves data quality, searching, and enhances professionalism in your reports.

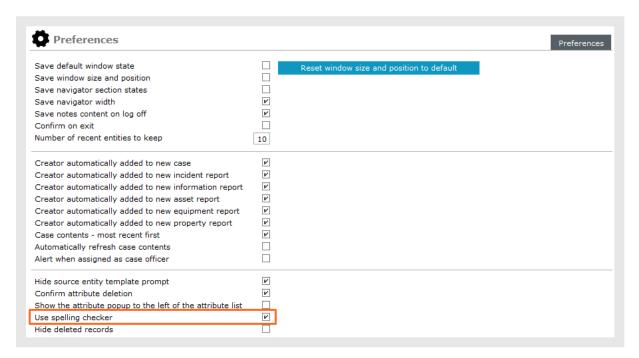
The spellchecker has a pre-loaded English dictionary.

If you're an admin user, you can edit this dictionary.

This includes adding words to it.

# Switch on the Spellchecker

- 1. Select your username > Select **Preferences**.
- 2. Select Use spelling checker.





## Using the Spellchecker

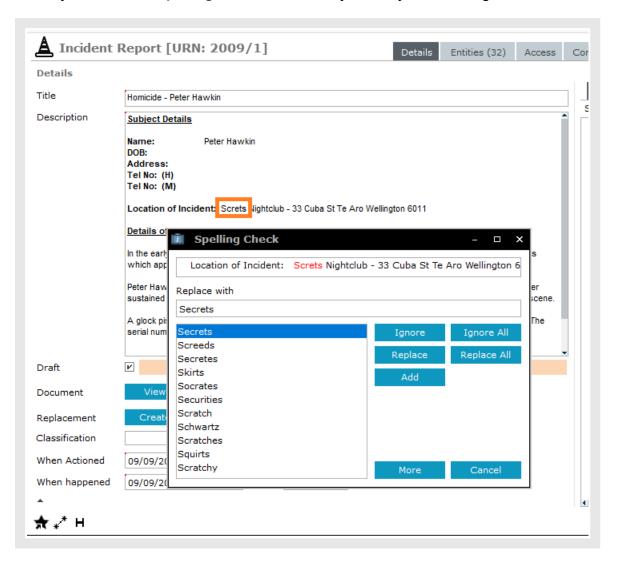
If you've enabled the spellchecker, when you save data after you create or edit an entity, ICM checks free-text fields like title and description for spelling mistakes.

If it finds a misspelt word, you'll be able to ignore or replace this.

If a suitable replacement word isn't available, you can select More to expand the list.

You can also enter the correct spelling manually.

When you close the Spelling Check window any words you've changed will remain corrected.





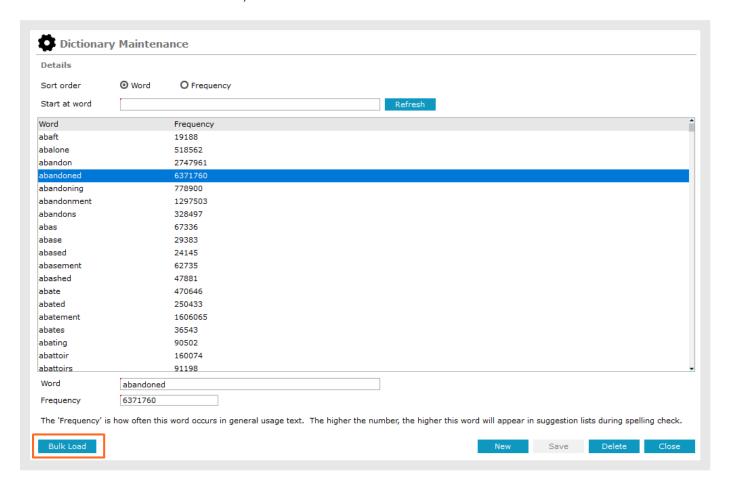
# **Edit the Dictionary**

If you have permission to edit the dictionary, you can add new words and change existing ones.

To do this, select **Admin > System > Dictionary Maintenance**.

You can also load several words at once from a text file.

To learn how to bulk-load words, hover on the Bulk Load button.



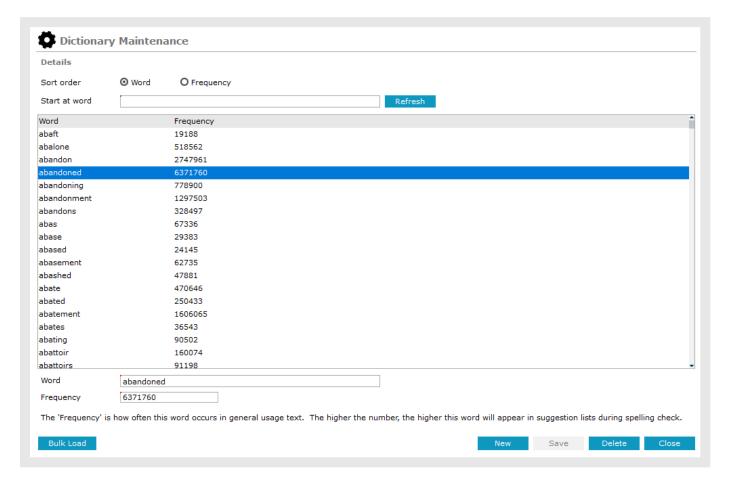


## Permission to Manage the Dictionary

To add words to the dictionary you need the Can add words to dictionary permission.

If you have this permission, you'll see the Add button in the Spelling Check window.

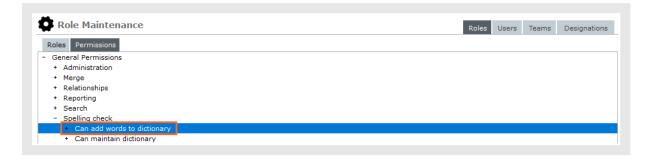
If you have the Can maintain dictionary permission, you can manage the dictionary.





## Give Someone Permission to Add Words to the Dictionary

- 1. Select Admin > Security > Roles.
- 2. Select the **Permissions** subtab.
- 3. Expand the **Spelling check** section.





# **General Changes**

We've made a few general changes.

#### More Control for Task Administrators

If you have the task administrator permission, you can:

- Add recipients
- Send a task to new recipients
- Remove individual recipients
- Delete the entire task

## Improved Data Export Files are Unicode-UTF8

Previously CSV data export files were in a simple Unicode format.

We've changed the format to Unicode-UTF8 to resolve a Microsoft Excel bug that causes Unicode CSV files to open with all the data in the first column.

If your default Windows application for CSV files is Excel, the programme now opens a CSV file with data in the correct columns.

# Improved Housekeeping for RPS Secondary Database

We've improved housekeeping for the secondary Relational Population Service (RPS) database:

- Transaction journals that have been fully processed by the RPS node will be removed.
- The housekeeping options applied to the secondary database—like the number of days to keep the processed log files—are the same as those applied to the primary database.

This improvement only applies only to sites running an RPS.

#### To see this change:

- 1. Select Admin > System Settings.
- 2. Select the Backup & Housekeeping tab.



## Issues Resolved in 6.3.1

We've resolved the following minor issues in the 6.3.1 release:

- You'll no longer get a 14011 exception if you try to add a new entity to a case note.
  - This was happening if you entered a partial name that had no match in the list and then pressed the down ↓ arrow on your keyboard.
- We've fixed the root case of a problem where sometimes tasks that were cancelled remained open in the task recipient's task list.
  - These tasks showed as being complete or cancelled.
  - They couldn't be removed and the recipient couldn't clear their tasks.