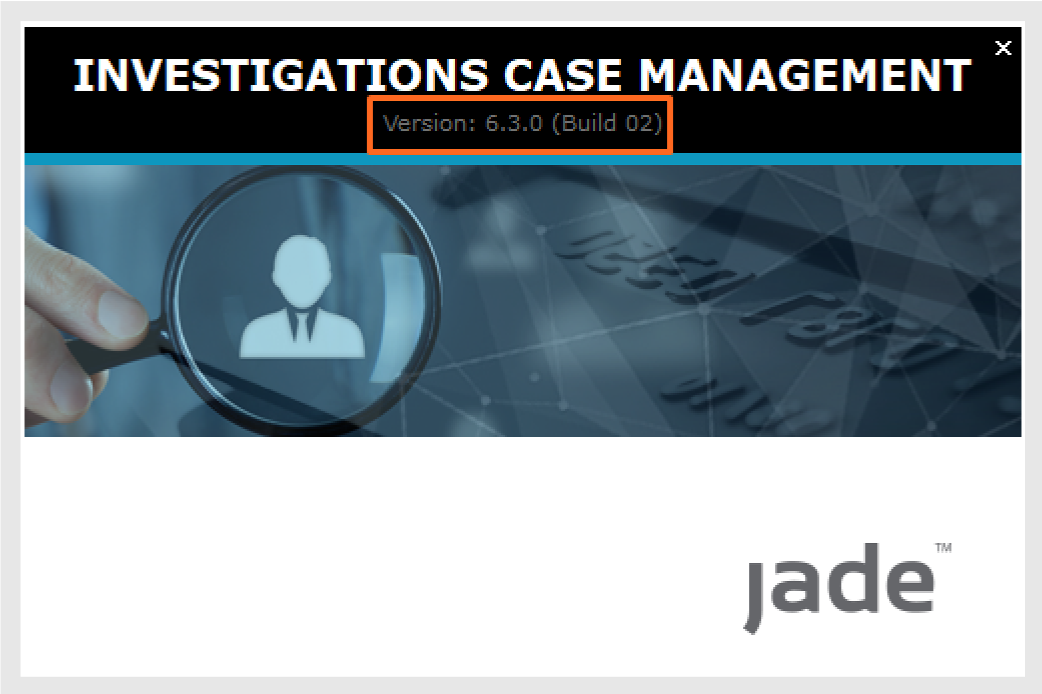
Investigations Case Management
- Release Notes

VERSION 6.3

Overview

These 6.3 release notes explain the new features available in this release of Jade Investigations Case Management (ICM) .

It also lists a few minor issues we found during rigorous product testing, which we've resolved.



Managing Cases

The contents of a case loads quicker and you can have it automatically refreshed.

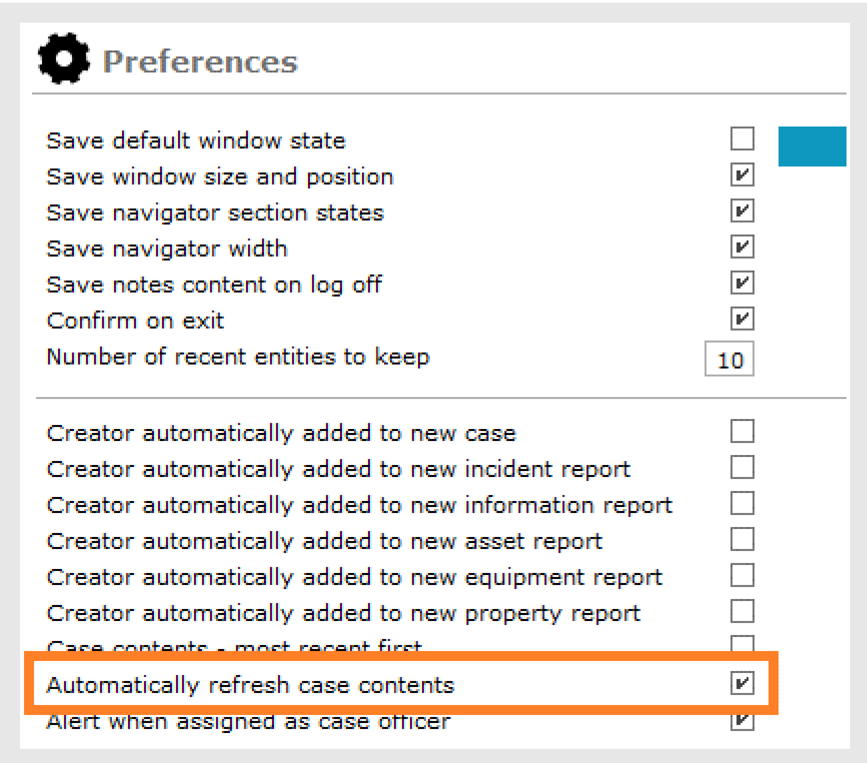
It's also easier to see who has permanent access to source documents.

Have the Case Contents Automatically Refreshed

If you want to see when someone updates the title of source document—like a case note or an information report, for example—you can have these changes immediately reflected in the case contents.

To activate this setting:

1. Select your username > Select **Preferences**.
2. Select the **Automatically refresh case contents** checkbox.



The Case Contents Loads Quicker

In previous versions of ICM, if you opened a case that contained thousands of case notes, it took a long time to load.

We've greatly improved the performance to make sure it loads quickly.

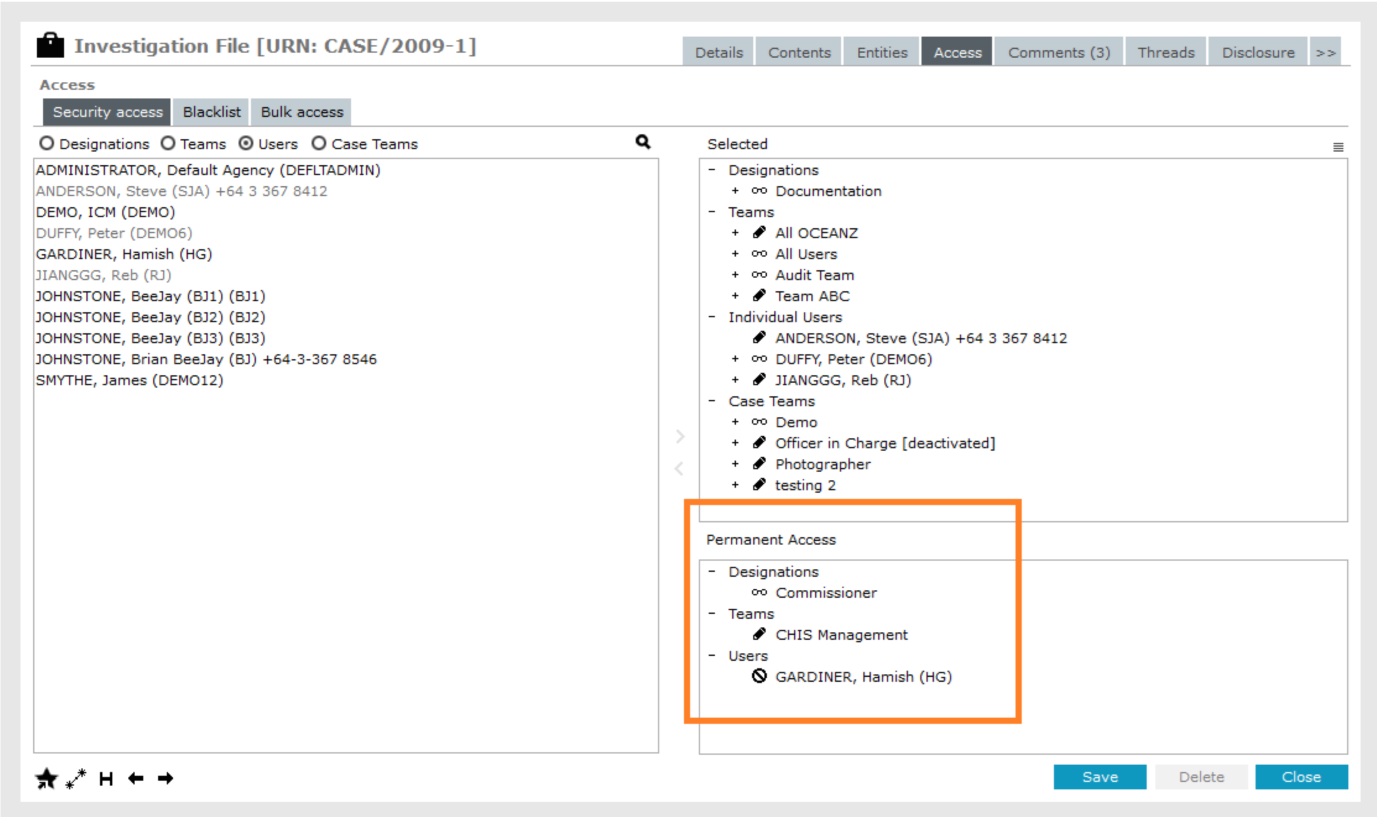
Easily See Who Has Permanent Access to Source Documents

There are three types of permanent access – Update, View, or Blocked.

It's easier to see who has permanent access to source documents for these types of entities:

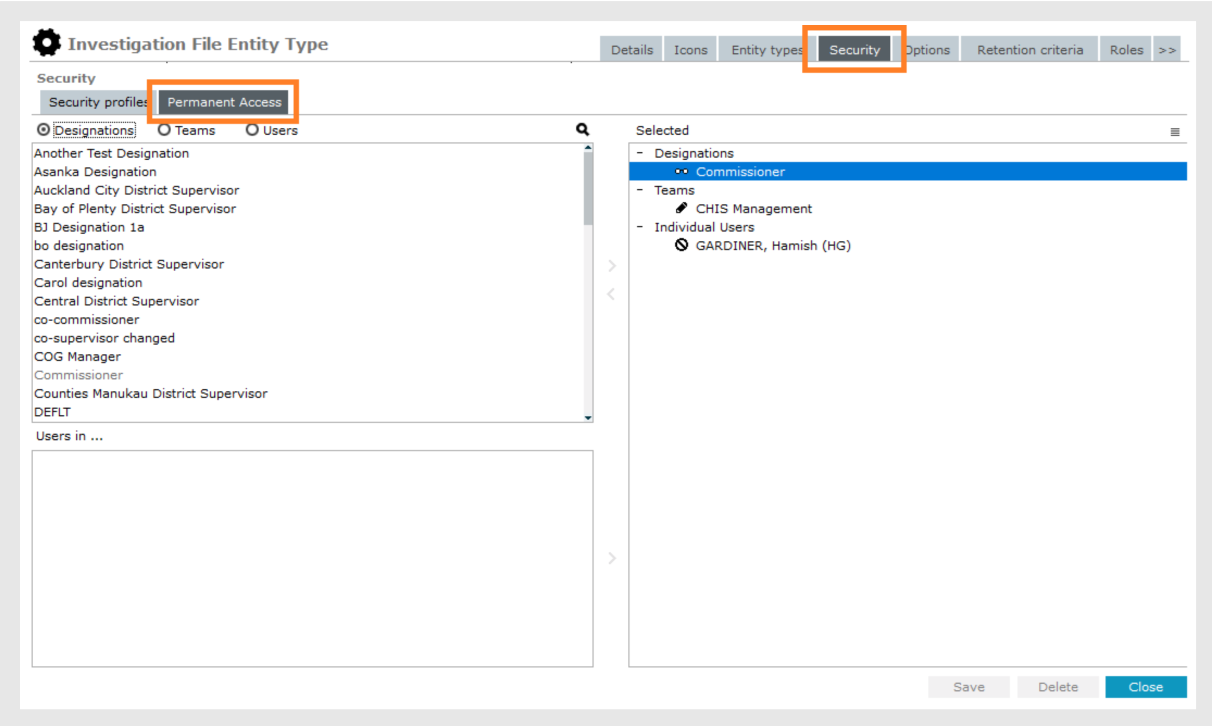
- Cases
- Case notes
- Information reports
- Incident reports
- Tasks

There's a new pane for **Permanent Access** when you open a case, select the **Access** tab .



Set up Permanent Access for Entity Types

1. Open the type of entity you want to edit.
2. Select the **Security** tab.
3. Select the **Permanent Access** subtab.



Searching

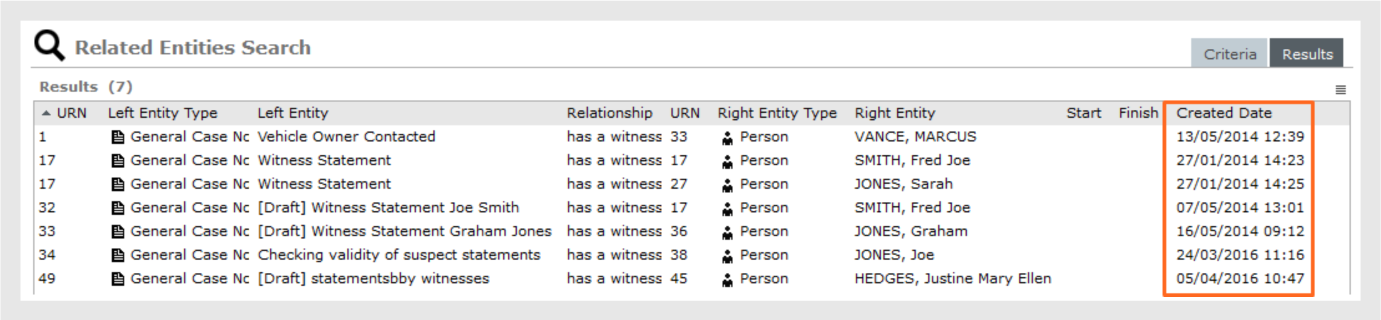
When searching, you can now:

- See when entity relationships were established
- Use a date range when searching for attributes that don't have a value
- Do an advanced scoped search

See When Entity Relationships Were Established

When you search for related entities, you'll see a new column in the search results that shows when the relationship between entities was specified.

This is useful if you need to generate report s that show when entity relationships were created.



Related Entities Search

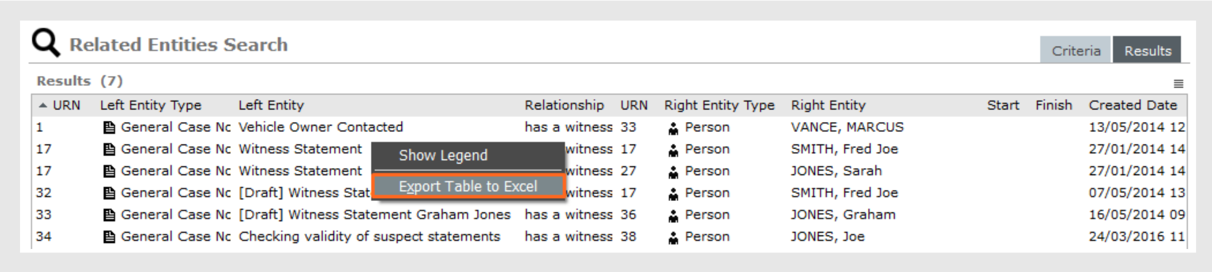
Criteria | Results

Results (7)

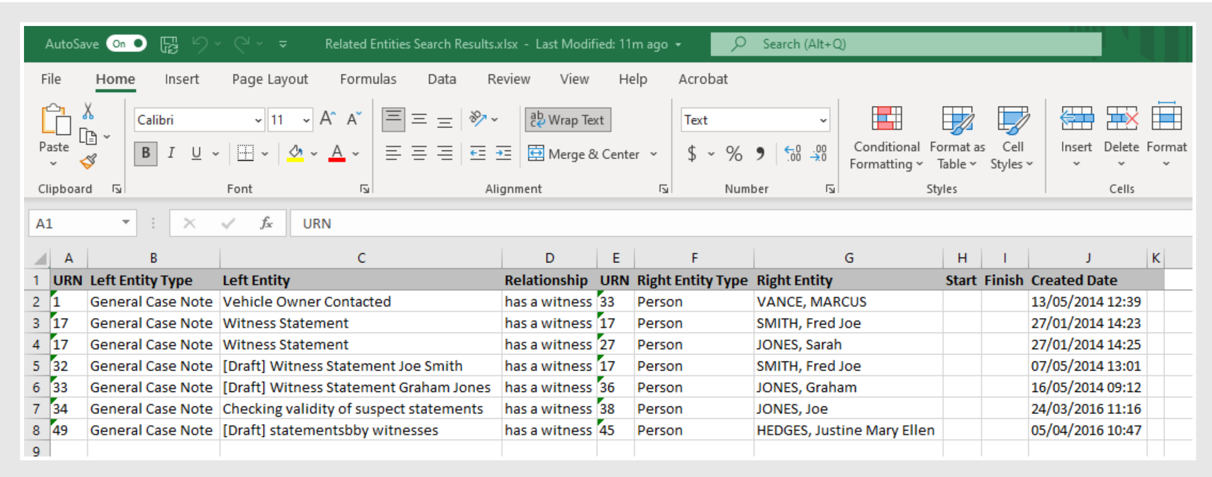
URN	Left Entity Type	Left Entity	Relationship	URN	Right Entity Type	Right Entity	Start	Finish	Created Date
1	General Case Nc	Vehicle Owner Contacted	has a witness	33	Person	VANCE, MARCUS			13/05/2014 12:39
17	General Case Nc	Witness Statement	has a witness	17	Person	SMITH, Fred Joe			27/01/2014 14:23
17	General Case Nc	Witness Statement	has a witness	27	Person	JONES, Sarah			27/01/2014 14:25
32	General Case Nc	[Draft] Witness Statement Joe Smith	has a witness	17	Person	SMITH, Fred Joe			07/05/2014 13:01
33	General Case Nc	[Draft] Witness Statement Graham Jones	has a witness	36	Person	JONES, Graham			16/05/2014 09:12
34	General Case Nc	Checking validity of suspect statements	has a witness	38	Person	JONES, Joe			24/03/2016 11:16
49	General Case Nc	[Draft] statementsbby witnesses	has a witness	45	Person	HEDGES, Justine Mary Ellen			05/04/2016 10:47

Export the Results of a Related Entities Search

1. Right-click your search results > Select **Export Table to Excel**.



2. Choose where you want to store the spreadsheet.
3. Save your changes.

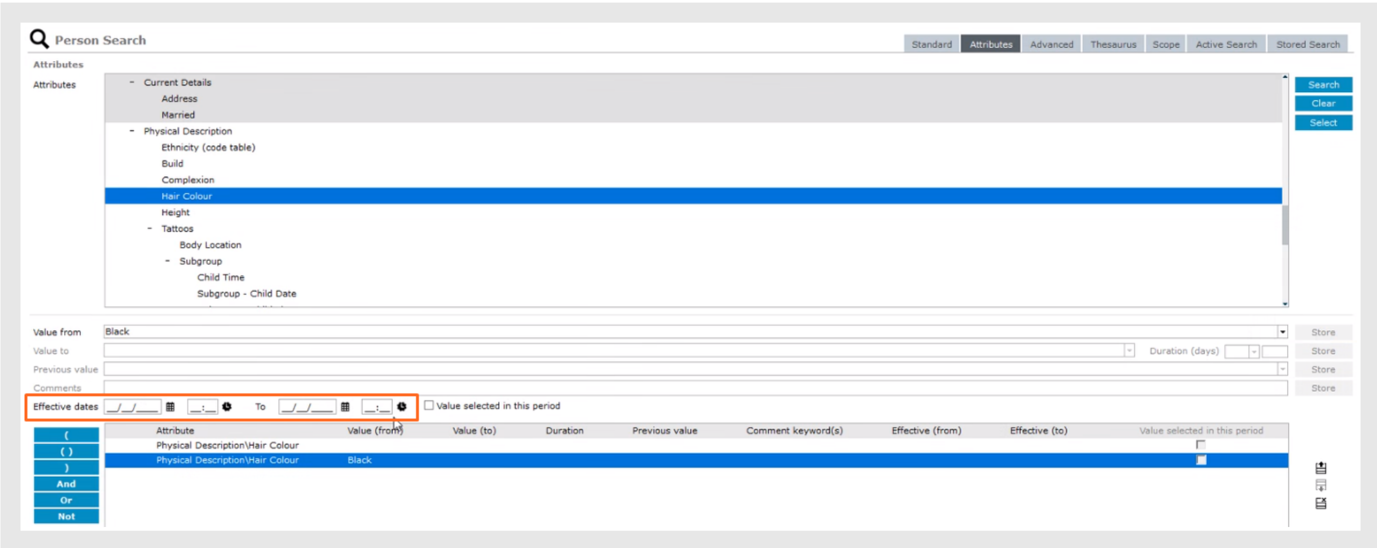


Use a Date Range to Search for Attributes That Don't Have a Value

Usually attributes have values. But you can have attributes without any values.

If you want to search for an attribute that doesn't have values, you can now do this across a date range.

Previously you could only do this if you also selected an attribute value.



More Options for Scoped Searches

When you create a scoped search, you now specify whether it's inclusive or exclusive:

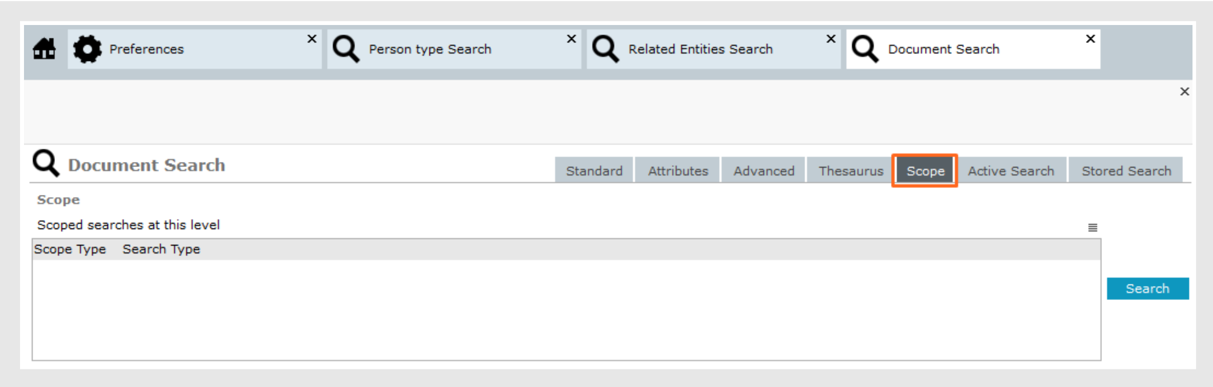
- For an **inclusive** scope, the search result entities must have a relationship to at least one of the scope entities.
- For an **exclusive** scope, the search result entities must NOT have a relationship to any of the scope entities.

This provides a useful way to narrow your search results.

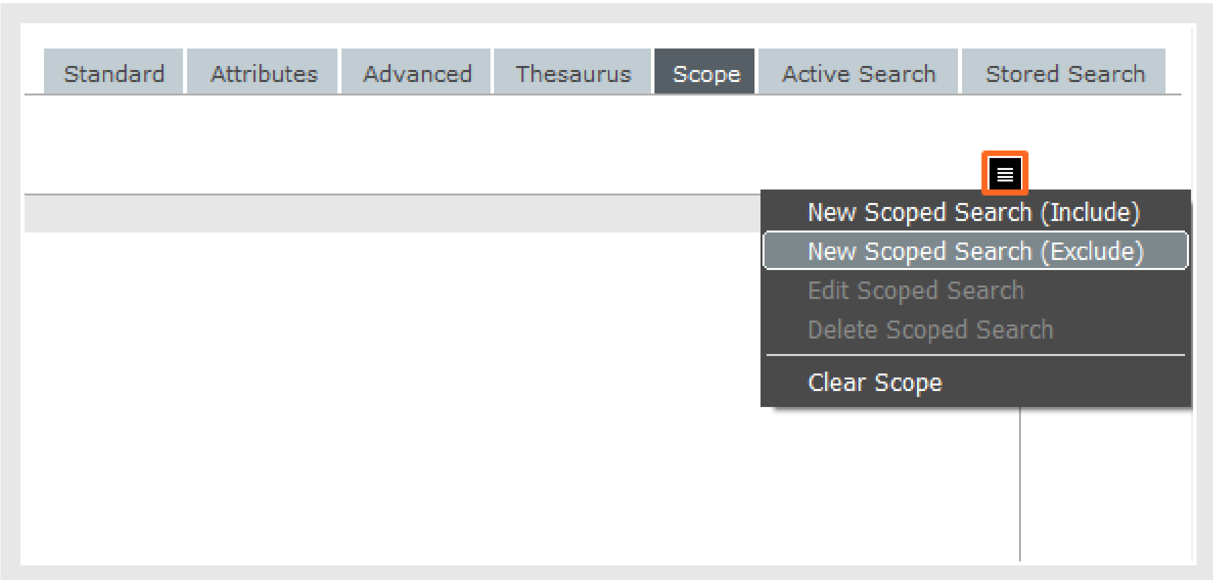
For example, you could exclude all person entities from a person search when that entity is used in a **Protected Person Case**.

Create an Inclusive or Exclusive Scoped Search

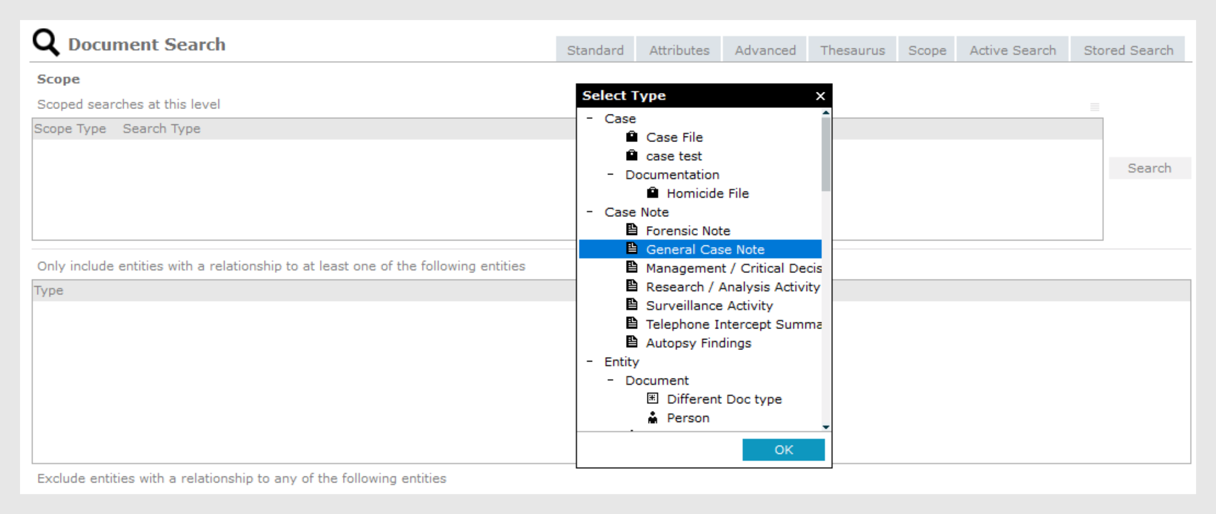
1. Select **Search** > Select the type of entity you're searching for.
2. Select the **Scope** tab.



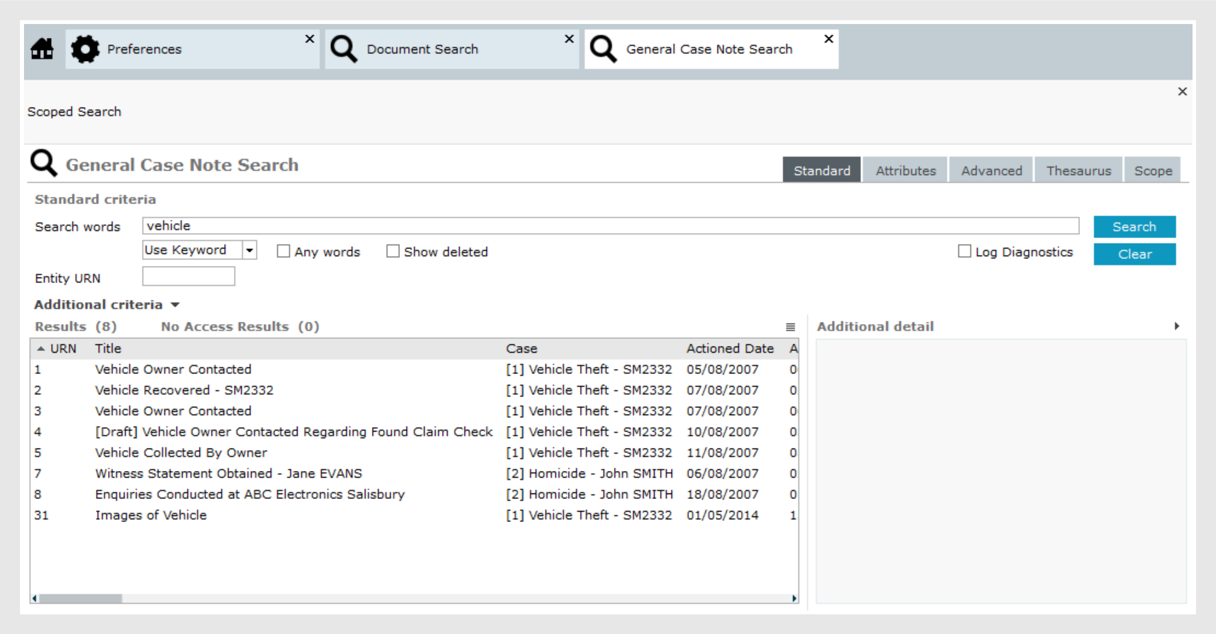
3. Expand the Options ≡ icon > Select either of these options:
   - New Scoped Search (Include)
   - New Scoped Search (Exclude)



4. Specify what you want to include or exclude > Select **OK**.



5. Enter your search criteria > Select **Search**.



Managing Tasks

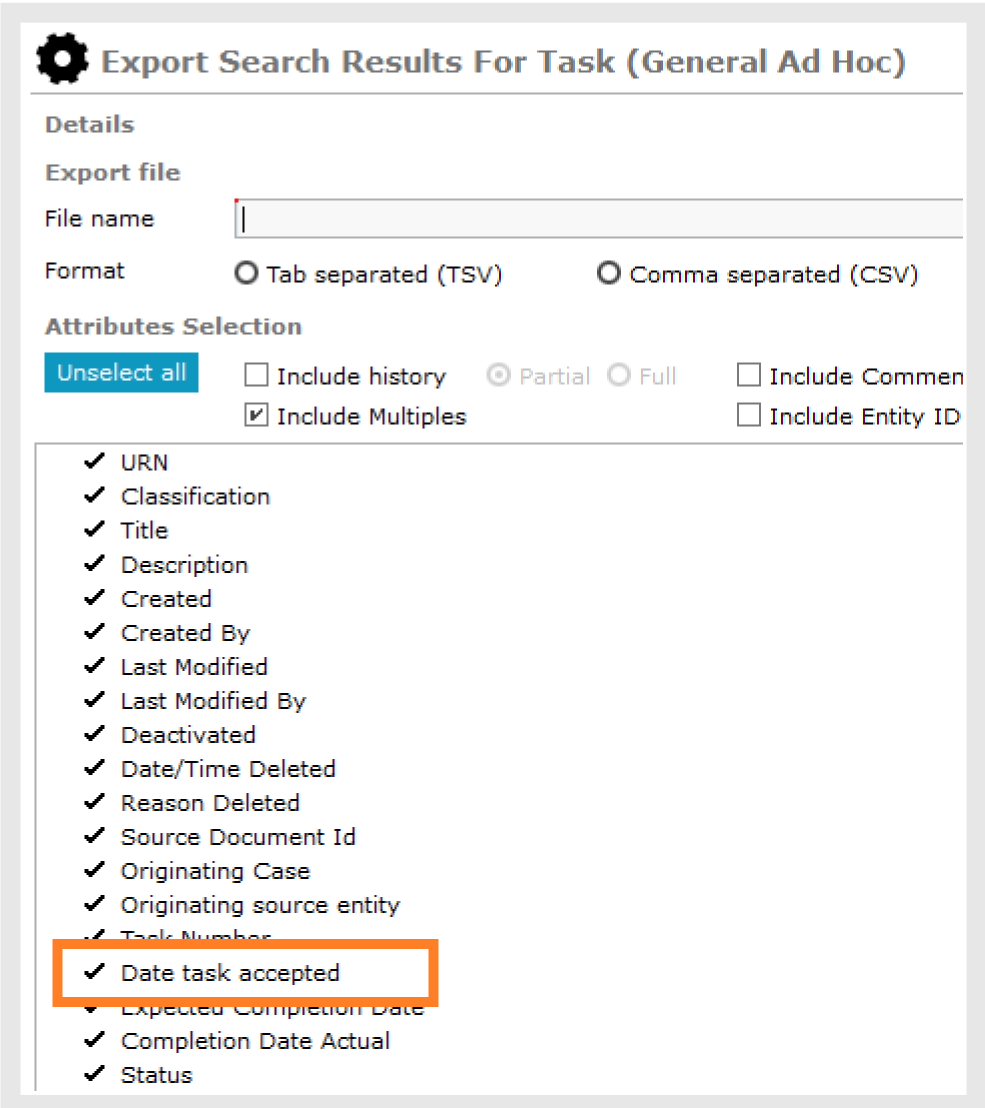
It's easier to manage tasks in your organisation – You can:

- Include acceptance dates when you export task data
- Send prompts to task recipients
- See all tasks regardless of their context
- Open a task in the correct mode

Include Acceptance Dates When You Export Task Data

Some organisations need to generate reports that show which tasks need to be completed within certain time frame.

If you need to do this, you can now include dates that show when a task was accepted.



Sending Task Reminders

You can now prompt task recipients to remind them about a task.

This is useful if you've created a task and you need to follow up on how it's progressing.

Instead of calling the person or emailing them, you can send them a prompt to remind them about the task.

When a task recipient receives and opens a prompt you've sent, they'll see your message about the task.

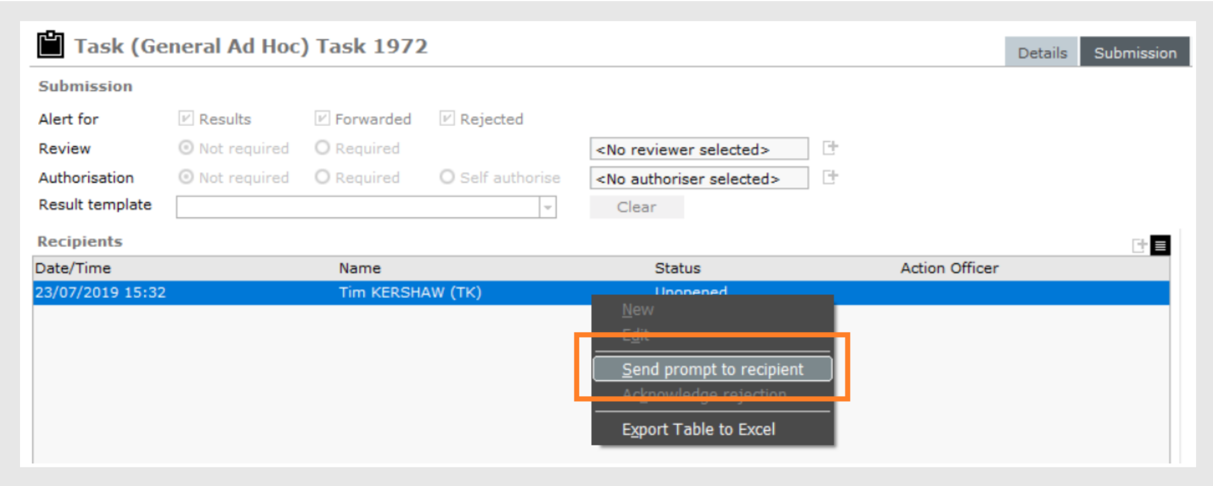
They can then select **Go to task** to go straight to that task and start working on it.

The **Send prompt to recipient** menu option is only enabled for tasks that have been sent to the recipient if they haven't completed these.

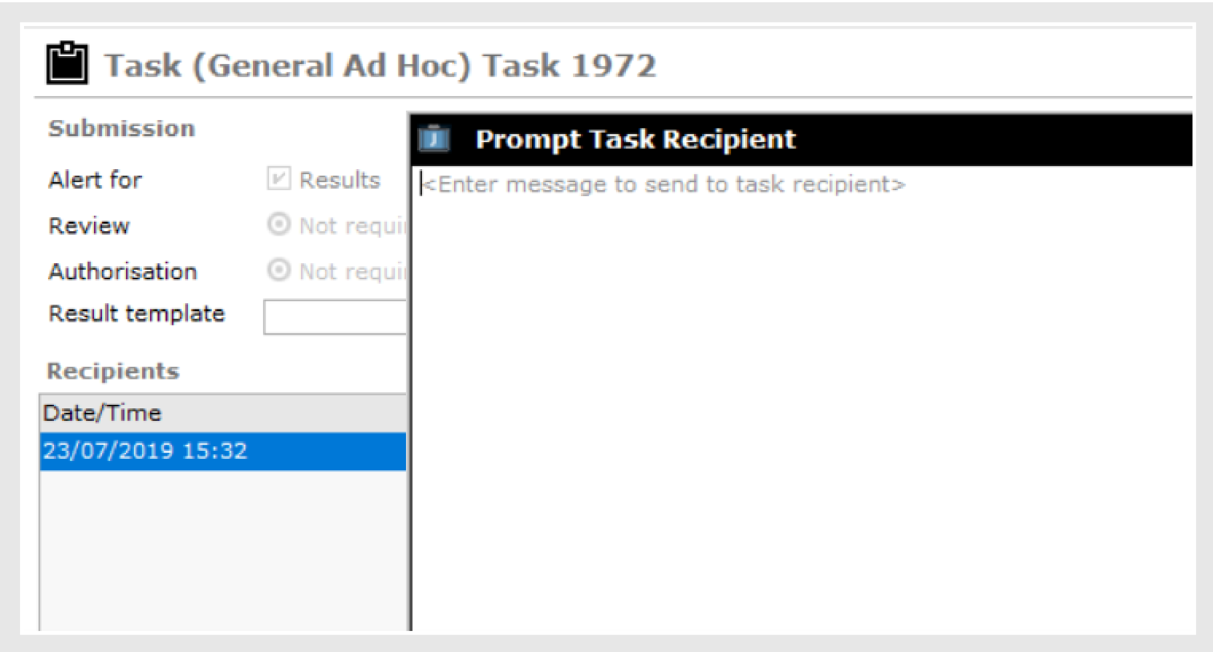
This means you can't accidentally remind someone about a task they've already completed.

Send a Reminder to a Task Recipient

1. Open the task.
2. Select the **Submission** tab.
3. Select **Send prompt to recipient**.



4. Enter a message for the task recipient.

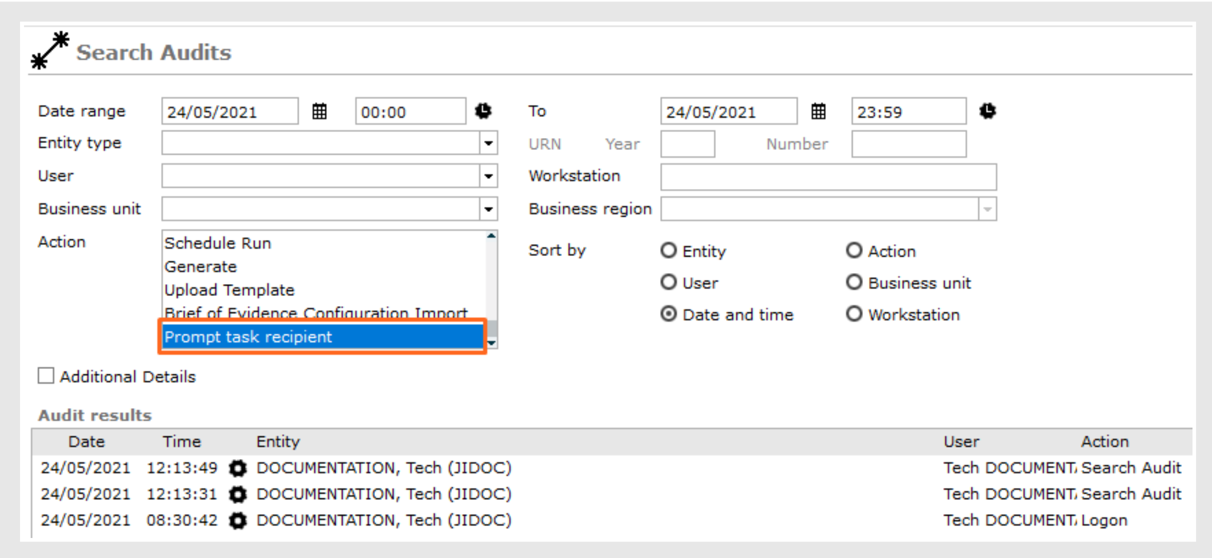


Check If Some Recipients Are Getting Lots of Prompts

ICM automatically audits the prompts sent.

To see if some users are getting lots of prompts:

1. Select **System** > **Search audits**.
2. In the **Action** area select **Prompt task recipient**.
3. Select **Search**.



See All Tasks Regardless of Their Context

In previous versions of ICM, tasks that were added to incident and information reports caused confusion when they were opened outside or inside a case context.

You'll now see all tasks regardless of whether they have a case context.

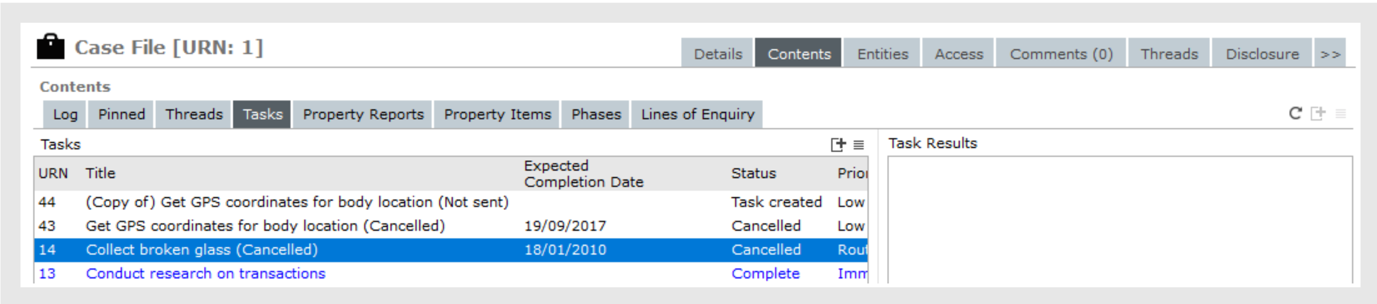
This applies unless the task had a case context for a case which the user didn't have permission to see.

Tasks Open in the Correct Mode

There are different viewing modes for tasks, depending on your role:

- Reviewer
- Authoriser
- Recipient

If you open a task you didn't create from the **Log** or **Tasks** subtab of the case contents, the task will open in the mode that's relevant to you.



General Changes

You can now:

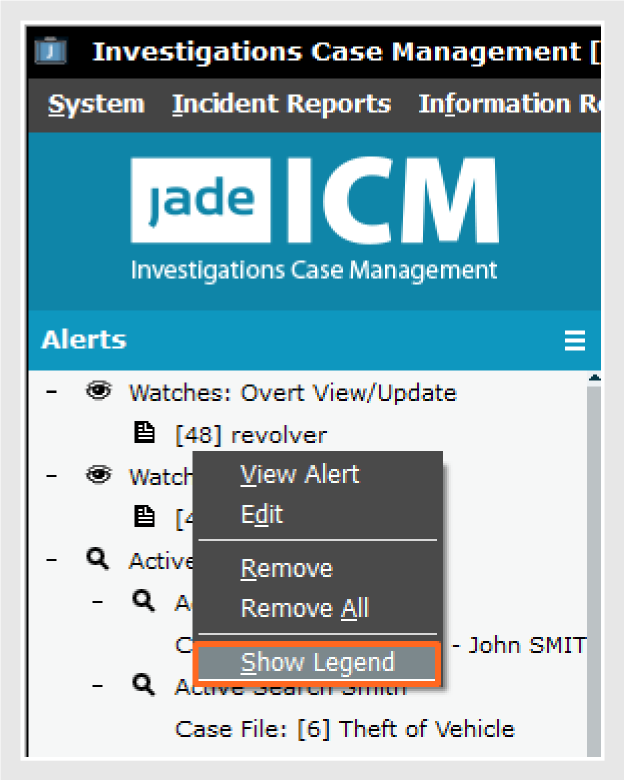
- Use a legend on the Alerts side bar to see what the text colours mean
- Export content that's been signed off for disclosure
- Include relationship data in entity-based Word reports
- Press F1 on any screen to go the page in the help centre that provides guidance for that area

A Legend for the Alerts Side Bar

A legend on the **Alerts** panel shows what the different text colours mean:

- Black text means the alert has been reviewed.
- Teal text means the alert hasn't been reviewed.

To see the legend, right-click the alerts panel > Select **Show Legend**.



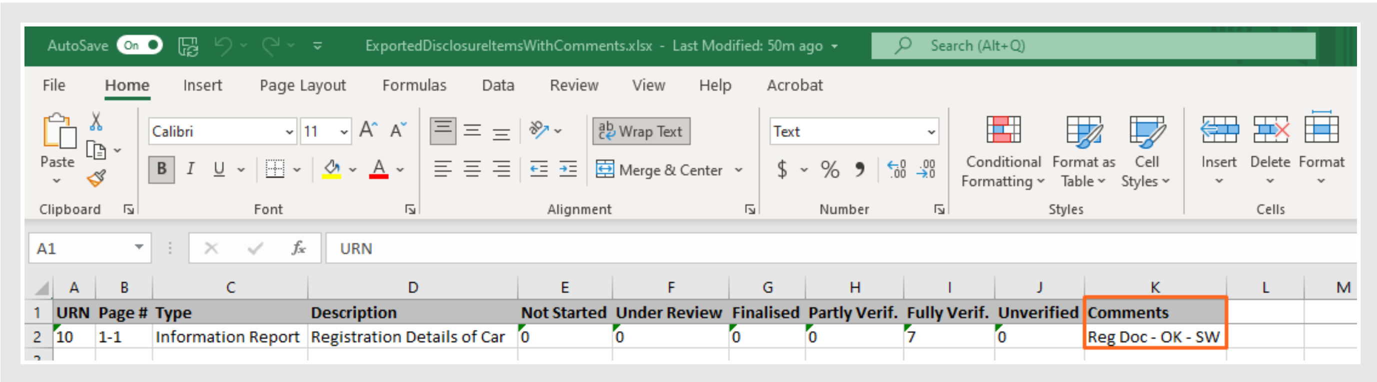
Exporting Content That's Signed off for Disclosure

You can export a search result for all documents, case notes, etc that have been signed off for disclosure.

When you do this for a case, you'll see a new **Additional Details** pane under the **Disclosure Items** subtab.

The **Additional Details** pane is collapsed by default. But you can expand it to see the comments entered when a user marked the items as ready for disclosure.

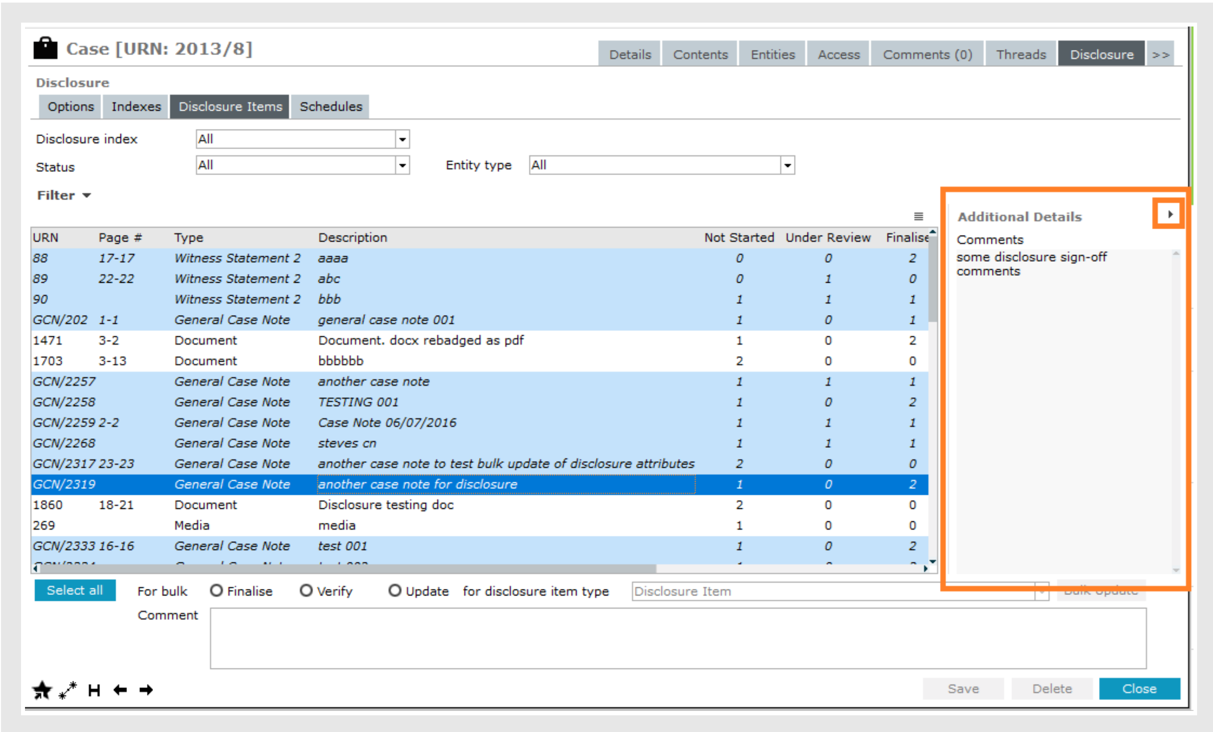
If you export the list of items to Excel, you'll see any comments.



URN	Page #	Type	Description	Not Started	Under Review	Finalised	Partly Verif.	Fully Verif.	Unverified	Comments
10	1-1	Information Report	Registration Details of Car	0	0	0	0	7	0	Reg Doc - OK - SW

Export Content That's Signed off for Disclosure

1. Open a case.
2. Select the **Disclosure** tab.
3. Select the **Disclosure Items** subtab.
4. Select the Expand section ◥ icon to show the **Additional Details** pane.

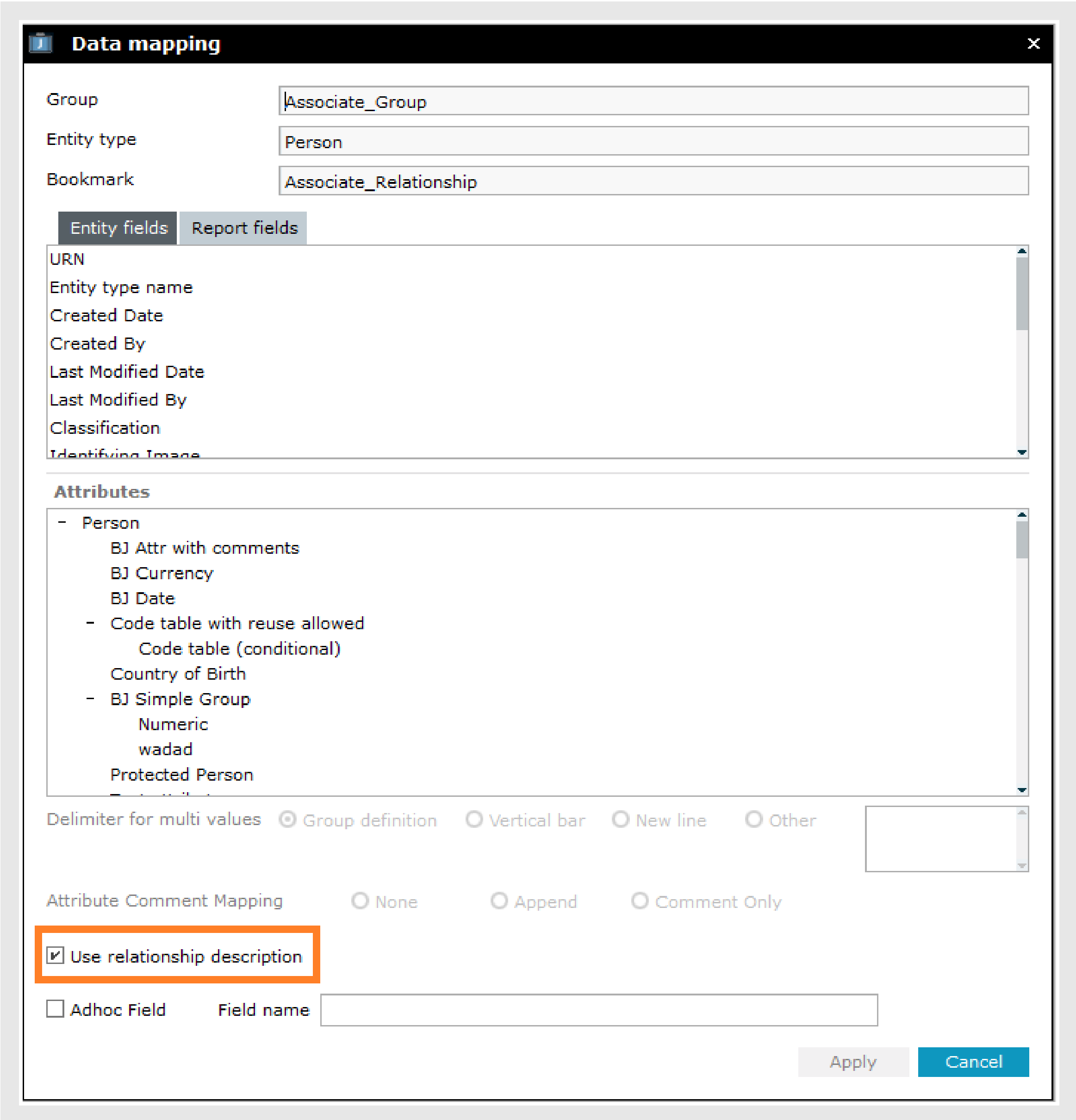


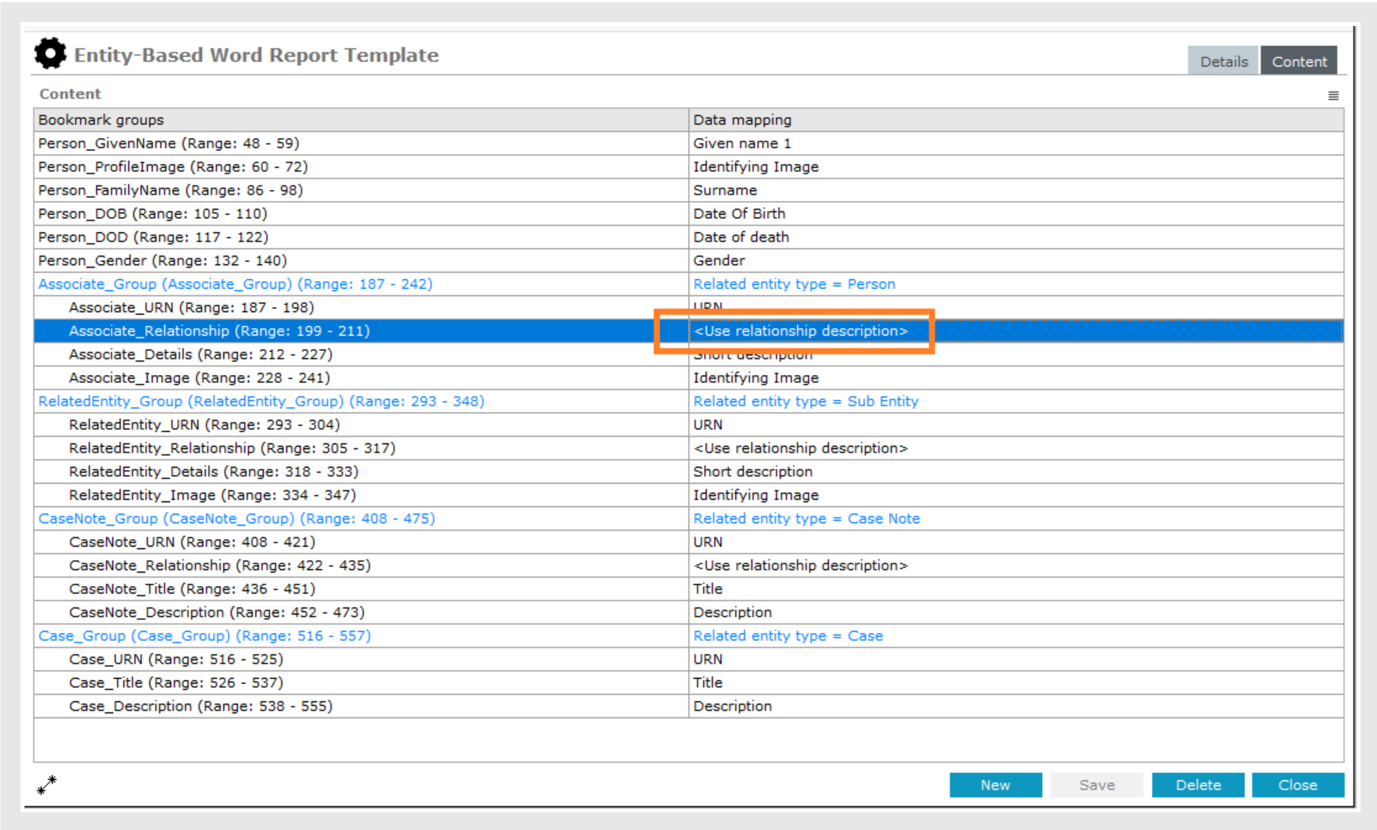
5. To see any comments in the **Additional Details** pane, select a disclosure item.
6. To export this content, right-click in the disclosure items area > Select **Export Table to Excel**.

Include Relationship Data in Entity-based Word Reports

In an entity-based Word report, you can now include the type of relationship an entity has with another entity.

To do this, select the new **Use relationship description** option when you map bookmarks to entity details.





Entity-Based Word Report Template

Details | Content

Content

Bookmark groups	Data mapping
Person_GivenName (Range: 48 - 59)	Given name 1
Person_ProfileImage (Range: 60 - 72)	Identifying Image
Person_FamilyName (Range: 86 - 98)	Surname
Person_DOB (Range: 105 - 110)	Date Of Birth
Person_DOD (Range: 117 - 122)	Date of death
Person_Gender (Range: 132 - 140)	Gender
Associate_Group (Associate_Group) (Range: 187 - 242)	Related entity type = Person
Associate_URN (Range: 187 - 198)	URN
Associate_Relationship (Range: 199 - 211)	<Use relationship description>
Associate_Details (Range: 212 - 227)	Short description
Associate_Image (Range: 228 - 241)	Identifying Image
RelatedEntity_Group (RelatedEntity_Group) (Range: 293 - 348)	Related entity type = Sub Entity
RelatedEntity_URN (Range: 293 - 304)	URN
RelatedEntity_Relationship (Range: 305 - 317)	<Use relationship description>
RelatedEntity_Details (Range: 318 - 333)	Short description
RelatedEntity_Image (Range: 334 - 347)	Identifying Image
CaseNote_Group (CaseNote_Group) (Range: 408 - 475)	Related entity type = Case Note
CaseNote_URN (Range: 408 - 421)	URN
CaseNote_Relationship (Range: 422 - 435)	<Use relationship description>
CaseNote_Title (Range: 436 - 451)	Title
CaseNote_Description (Range: 452 - 473)	Description
Case_Group (Case_Group) (Range: 516 - 557)	Related entity type = Case
Case_URN (Range: 516 - 525)	URN
Case_Title (Range: 526 - 537)	Title
Case_Description (Range: 538 - 555)	Description

New | Save | Delete | Close

Help Centre

We've reskinned the help centre to make it easier to navigate, and made contextual help available for all screens.

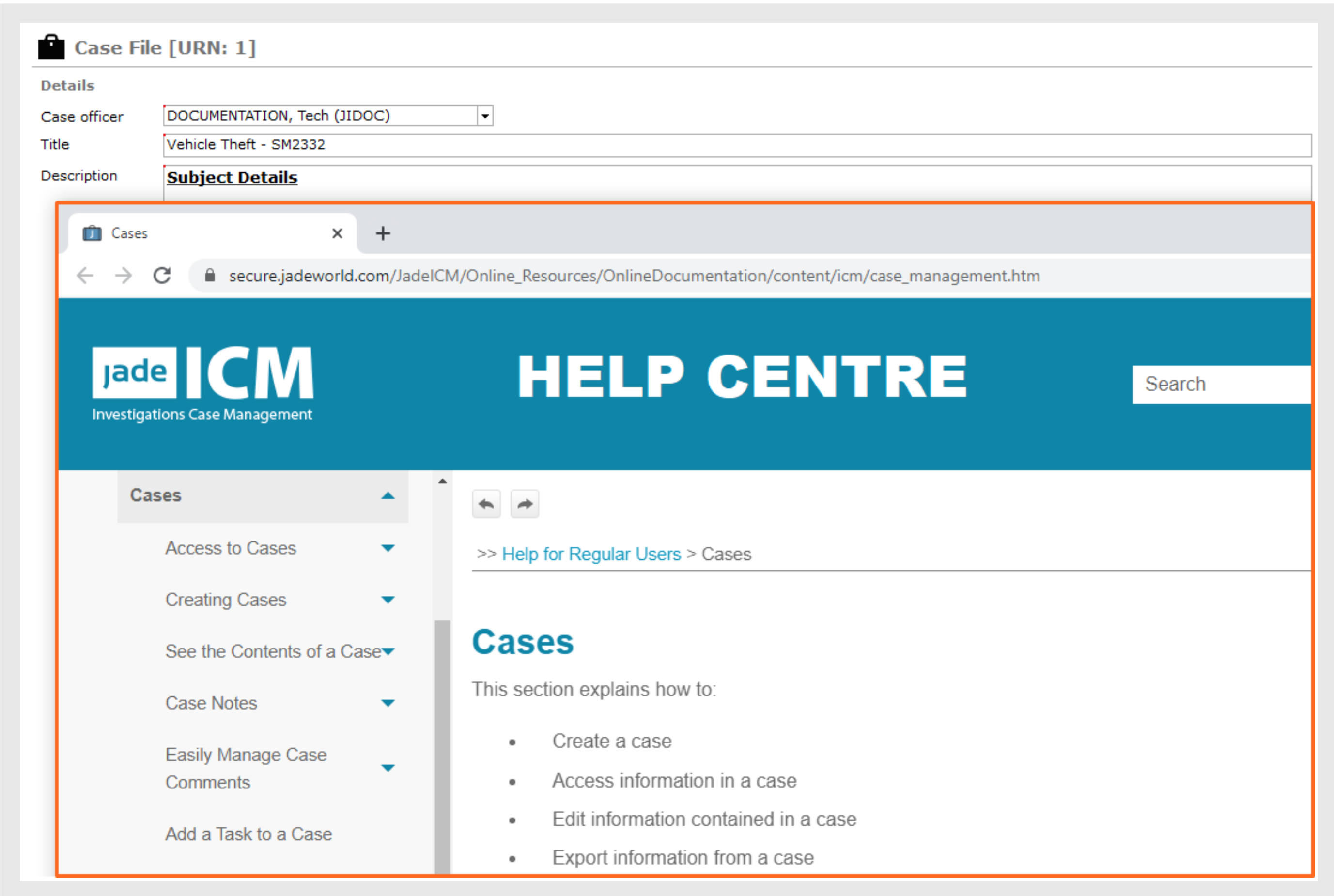
Improved Interface and Navigation

We reskinned the help centre to make it easier to use.

Take a tour to see how to get the most out of this site.

Contextual Help

Press **F1** on any screen to go the page in the help centre that provides guidance for that area.



Settings

If you're in charge of ICM settings in your organisation, you can now:

- Manage backups more easily
- See why an upgrade failed
- See if you need more licences
- Export attribute structures more easily

Backups

If you disable backups, you can still do housekeeping tasks.

If a backup succeeds but housekeeping fails, you'll see more information about this.

More Information If a Backup Succeeds but Housekeeping Fails

Previously	Now
It was possible for a backup to complete successfully even though old journal files weren't removed and housekeeping failed. Admin users would receive an email to say the backup was successful, but got no information about the housekeeping failure. Eventually the journals folder might fill up to the point of disc failure. There was no warning to manually remove old journals before restarting the system.	If housekeeping fails, you'll be notified about this so you can check your journals folder and remove old files.

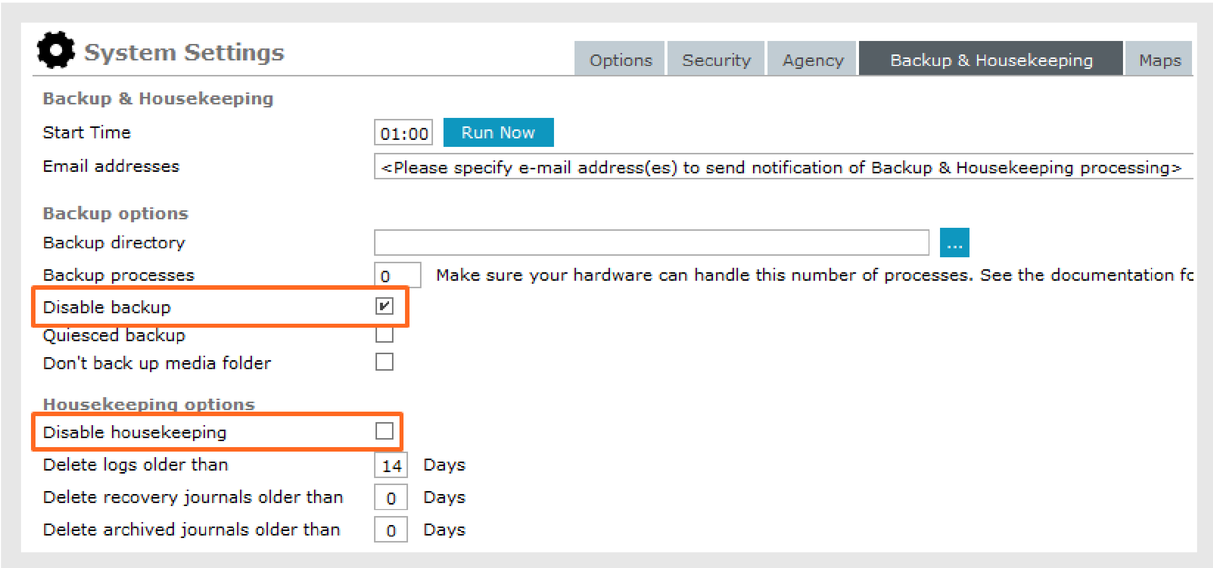
If You Disable Backups You Can Still Do Housekeeping Tasks

Previously, if backups were disabled, this would prevent housekeeping tasks that remove old transaction journals.

Now housekeeping continues, independent of the backup setting, unless you've specifically disabled housekeeping.

To check your settings:

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



More Information If an Upgrade Fails

Previously	Now
If an upgrade failed you'd get a message to say this had happened, but not much information about why.	If this happens you'll see some tips on what might have caused the failure and how you might be able to resolve the situation.

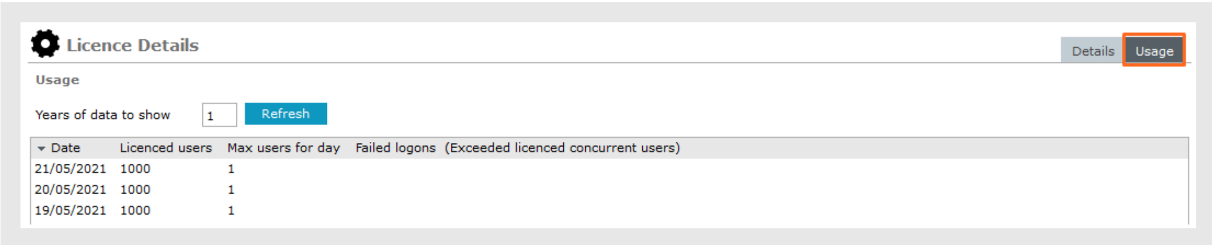
Keep Track of Concurrent Users to See If You Need More Licences

ICM now maintains a daily record of:

- The maximum number of concurrent users
- The number of failed logons caused by your organisation exceeding its maximum number of concurrent users

To see if you need more licences:

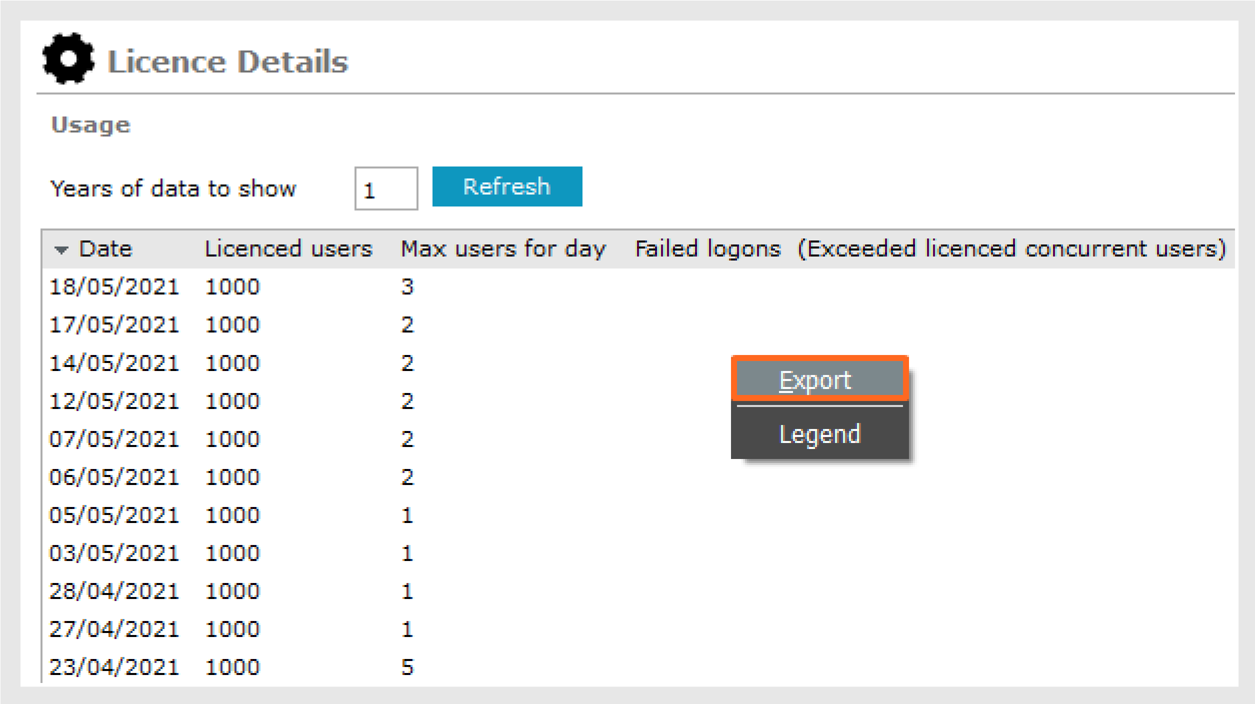
- Select **Admin** > **System** > **Licence**.
- Select the **Usage** tab.



Days where there were one or more failed logons have a light yellow background.

By default, you'll see the last year's logons, but you can choose to see more.

To export the data on this screen to Excel, right-click the usage area > Select **Export**.



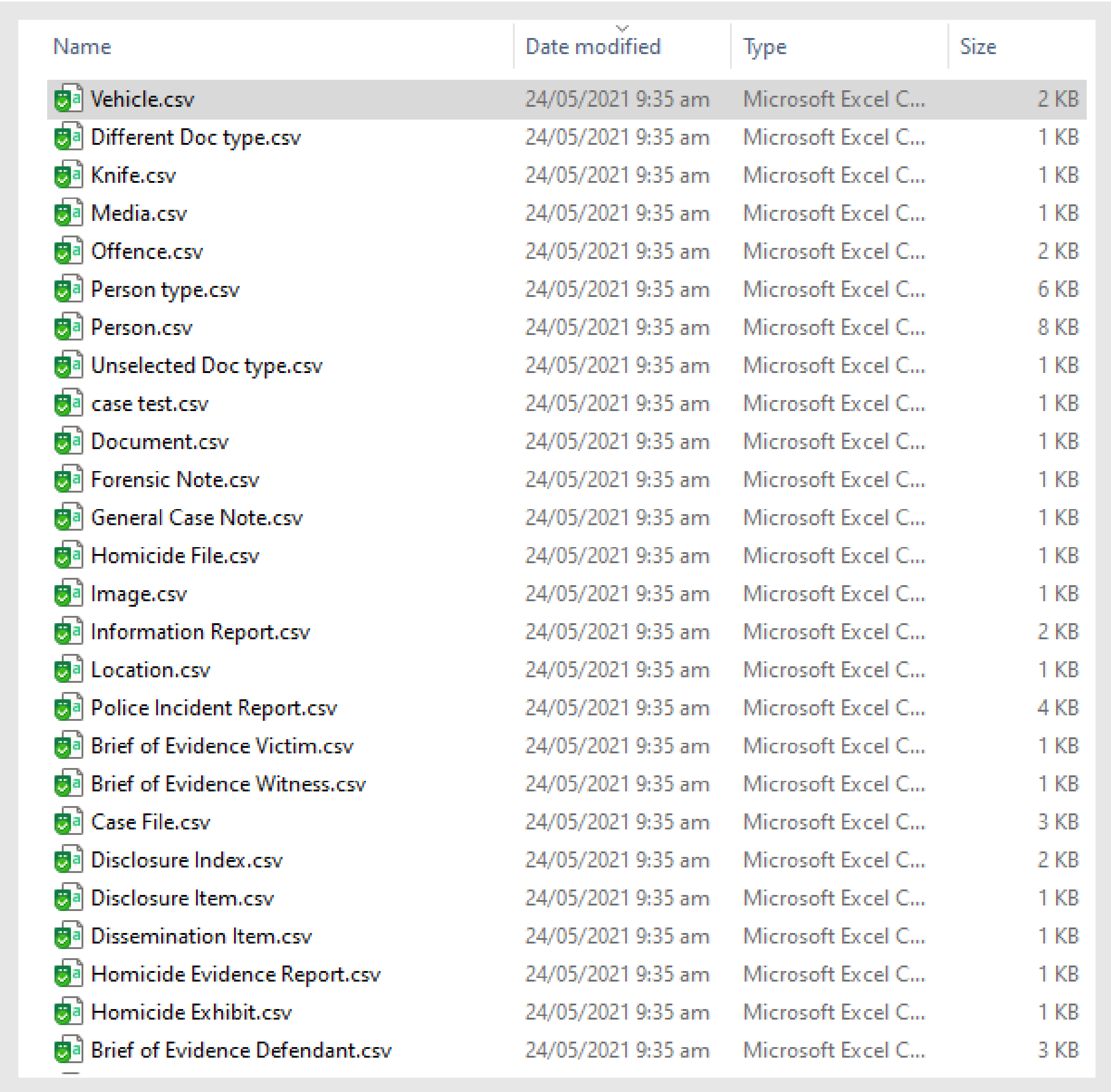
It's Easier to Export Soft Attribute Structures

You can export the metadata details of all configured attributes to CSV files.

You can export one file for each entity type.

To do this:

1. Select **Admin** > **System** > **Export** > **Entity Attributes Metadata.**
2. Specify where you want to export the file > Select **OK**.



Name	Date modified	Type	Size
Vehicle.csv	24/05/2021 9:35 am	Microsoft Excel C...	2 KB
Different Doc type.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Knife.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Media.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Offence.csv	24/05/2021 9:35 am	Microsoft Excel C...	2 KB
Person type.csv	24/05/2021 9:35 am	Microsoft Excel C...	6 KB
Person.csv	24/05/2021 9:35 am	Microsoft Excel C...	8 KB
Unselected Doc type.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
case test.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Document.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Forensic Note.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
General Case Note.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Homicide File.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Image.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Information Report.csv	24/05/2021 9:35 am	Microsoft Excel C...	2 KB
Location.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Police Incident Report.csv	24/05/2021 9:35 am	Microsoft Excel C...	4 KB
Brief of Evidence Victim.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Brief of Evidence Witness.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Case File.csv	24/05/2021 9:35 am	Microsoft Excel C...	3 KB
Disclosure Index.csv	24/05/2021 9:35 am	Microsoft Excel C...	2 KB
Disclosure Item.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Dissemination Item.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Homicide Evidence Report.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Homicide Exhibit.csv	24/05/2021 9:35 am	Microsoft Excel C...	1 KB
Brief of Evidence Defendant.csv	24/05/2021 9:35 am	Microsoft Excel C...	3 KB

Resolved Issues

We've resolved the following issues in the 6.3.0 release:

- When you're managing user accounts and you start typing to find a user, the **show deleted / deactivated** setting is applied correctly.

  Previously you'd see a deactivated user when the option was set to hide deactivated and deleted users.

- When you enter data for a Team attribute type, the available list no longer includes deactivated teams.
- If a recipient opens a task while someone else is cancelling it, you'll no longer see an exception error.
- If you use the **Edit User** form to change the password for an existing user, the password complexity rules are applied correctly.
- If you're an admin user and your organisation uses direct logon from Windows, you'll no longer need to re-enter your password when you reset a user's password.