



# Investigations Case Management - Release Notes

VERSION 6.1

**jade**<sup>™</sup>

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## OVERVIEW

This document explains the new features available in the 6.1 release of Investigations Case Management (ICM).



## Download the Latest Help File

An updated, searchable help file is available – [Download ICM Help](#).

Once you have downloaded the help file you'll need to link to it in your installation of ICM:

1. Select **Admin > System > Settings**.
2. Paste your URL for the help file in the **Help file base URL** field.
3. To specify the landing page for the help file, enter **default.htm** in the *Help index page* field > Select **Default**.
4. Save your changes.

### System Settings

Options

Security

Agency

Backup & Housekeeping

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**Options**

Database ID   Laptop system

Environment

Application name

Language

Contact number format

Max image or document size  MB

Max email attachment size  MB

Media attachment directory

---

Hide no access results on searches

Allow source entities directly added to case  (Allow source entities to be introduced directly into a case v

Single source entity relationship  (Allow only one relationship type to be configured between

Include default source entity relationship  (Include the system default relationship type 'references' <

Enable Phase and Line of Enquiry feature  Phase/LOE/Review/Disclosure collapsed by default

View Word file as PDF  (Clicking view button for a document entity will display a P

Display Entity URN  For Contact Number, Location

Show user details on attributes with history

Hide the 'Outlook' tab on all forms

Allow case centric storage locations

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**Help Options**

Help file base URL

Help index page

## ENTITIES

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### Recover Your Word Document

Occasionally, due to unexpected circumstances, Word documents edited during an ICM session got 'lost' and needed substantial rework by the author.

The author thought the document was saved according to the normal save options in Word, but it wasn't committed to the database yet. Saving the ICM document entity does this.

ICM now checks a Word document being edited every 30 seconds to see if the author has saved it. If the document has changed, that 'saved' version is committed to a recovery document in the database.

Once you save the document as a document entity in ICM, the recovery document is no longer needed so it's deleted.

The next time someone opens the document entity, if a recovery document exists, you'll have these options to proceed:

<b>Continue Editing</b>	Continue editing the changed version and save the final version in Word and ICM.
<b>Discard Changes</b>	Remove the unsaved changes and start editing the most recently saved version of the document.
<b>Close</b>	Close the document. For example, you might use this option if the unsaved version was created by another user to allow them to continue with their changes.

**Document has unsaved changes** ✕

This document has some changes which were saved in Microsoft Word but were not saved in ICM.

User who was editing: Steve ANDERSON (SJA)

Date/Time: 06/03/2019 09:32

You can use the 'View Unsaved Document' and 'View Saved Document' buttons to allow you to compare the two versions of the document. Once you have compared them you can choose which of the other buttons is most appropriate to use.

**Continue Editing**  
This will allow you to continue editing the changed version and then eventually save the final version in Word and ICM.

**Discard Changes**  
This will remove the unsaved changes and then allow you to start editing the most recently saved version of the document.

**Close**  
This will simply close this document. For example, you may use this option if the unsaved version was created by another user, to allow them to continue with their changes.

View Unsaved Document
View Saved Document
Continue Editing
Discard Changes
Close

## Link to a Document

Instead of storing a document in ICM, you can link to one stored in your external document management system:

1. Open a document entity.
2. Select the Expand section ▲ icon in the **Details** section.
3. Enter the link to your document in the **Description** field.

Document 22 Tom Jeckels details

**Document [URN: 22]** Details Images Related text

**Details**

Title Tom Jeckels details Edit ▲

Description Tom Jeckel www.tomieckelDoc22 Browse Template

Hash Value 29748B364A53908FAD46D1E9375AC18E3432BFF2

Classification  

Open release  Limited release  Locked  Versioning ena

**Disclosure ▼**

Relationships Relationship summary History Involvements Phase & LOE **Versions**

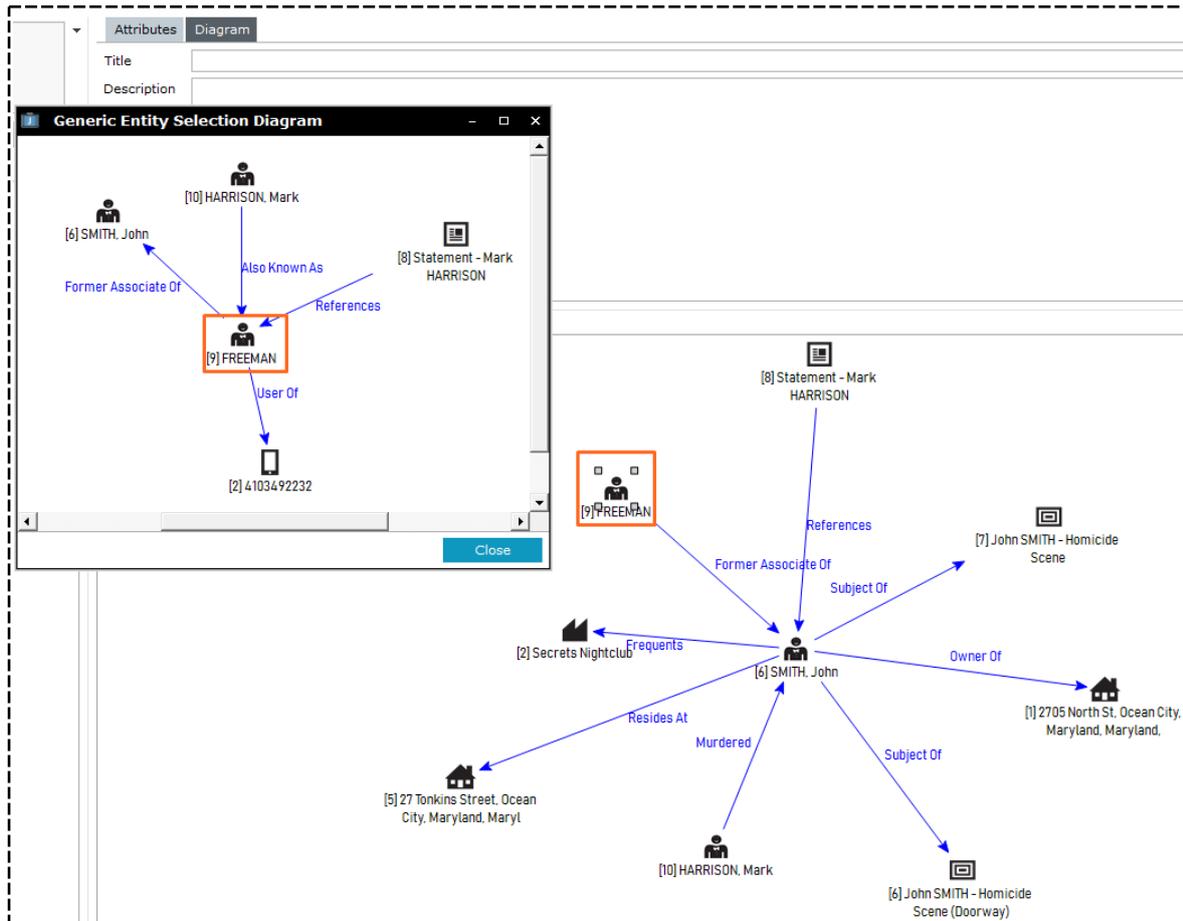
Versions ☰

Version#	Date/Time	Title	Replaced	File Path
0000004	30/03/2016 11:09	Person JECKEL Tom (Profile).doc		C:/temp/
0000003	30/03/2016 10:54	Person JECKEL Tom (Profile).doc		C:/temp/

## Start a New Diagram

You can create a new diagram using an entity in an existing diagram as the focus for the new diagram. This entity you select will become the focus in the new diagram.

1. Open a diagram.
2. Right-click the entity in the existing diagram you want at the centre of the new diagram > Select **Diagram This Entity**.
3. Select the required options > Select **OK**.



## Bookmarked and Entity-based Word Reports

You can map attribute comments for the Bookmarked Word report and the Entity-based Word report.

When you select an attribute that allows comments you can choose from these options:

<b>None</b>	Attribute comments won't be mapped. Only the attribute value will appear in the report, not the attribute comments.
<b>Append</b>	Attribute comments will appear in the report attached to the attribute value. They'll be on a new line with the prefix <b>Comments</b> .
<b>Comment Only</b>	Only the attribute comment will show in the report, not the attribute value.

**Data mapping**
✕

Group:

Entity type:

Bookmark:

Entity fields

Report fields

Surname

Given name 1

Given name 2

Given name 3

Title

Gender

Date Of Birth

**Attributes**

- Fingerprints on file
- Fred
- Hair styles
- Inactive Status
- Legal Ownership
- Mandatory Comment - More Information.
- Master PRN
- Modification GP
  - Is it modified?
  - Professionally modified?

Delimiter for multi values:  Group definition  Vertical bar  New line  Other

Attribute Comment Mapping:  None  Append  Comment Only

## Limited Release Entities

A limited release entity is one which will show in the results list for a search even if the user doesn't have direct access to it.

This has been an ICM concept for all historic versions, but in 6.1 we've changed the logic controlling when the **Limited Release** tab shows.

It's only visible (and enabled) if this is the only access the user has to the entity. The standard tabs (Relationships, Relationships Summary, History, etc.) aren't shown.

The screenshot shows the 'Event [URN: 25]' entity view. The 'Details' tab is active, displaying the following information:

- Art Exhibition
- Start: 05/08/2015 16:14 End: 05/08/2015 19:30
- Classification:
- Open release: No    Limited release: Yes    Fictitious: No

The 'Limited release' tab is highlighted, and a table below it shows the case details:

Case	Case officer
2013/9	ANDERSON, Steve

Users with View or Update access to the entity will see the standard tabs, but won't see the Limited Release tab. This is normal.

The screenshot shows the 'Event [URN: 25]' entity view with standard tabs. The 'Details' tab is active, displaying the same information as the previous screenshot. The 'Relationships' tab is selected, showing a table of relationships:

Relationship	To	URN	Entity	Start
Contained in (Contai	📁	WebCN-:	Web CN 1	
Referenced In (Refe	📁	2009/1	Homicide - Peter Hawkin	
mentioned in (menti	📁	GCN/29;	testing	

The 'Filter' list on the right shows the following items:

- Incident Report
  - ▲ Incident Report
- Case Note
  - 📁 General Case Note
  - WebDevCaseNotes
    - 📁 WebDev Case Note
- + Cases

## Attribute Selection

We've reinstated this feature.

On the selected attributes list, you can select the attribute type description to automatically select the area where you specify the attribute value.

# TASKS

## Set the Default Value for Can Reject or Forward

To suit your business requirements, your ICM administrator can set the default value as selected or deselected for these recipient checkboxes:

- Can Reject
- Can Forward

This setting is available for each type of task.

**Task - Ad Hoc Entity Type** | Details | Icons | Entity types | Relationships | Usages | **Options** | Retention criteria | >>

**Options**

Default classification

Display warning when another user is updating

Hide no access results on searches  Exclude from duplicate identification  Requires Authorisation  Check access at run time

Default 'Can forward' to true when adding recipient  Default 'Can reject' to true when adding recipient

**Review default**

No review required  Review required

**Task - Ad Hoc [URN: Task 1883]** | Details | Submission | Entities (2) | Results (0) | Access | Threads (0) | History | >>

**Submission**

Alert for  Results  Forwarded  Detected

Review  Not

Authorisation  Not

Result template

**Recipients**

Date/Time	Name
07/03/2019 13:46	Bay of Plenty District Supervisor
07/03/2019 13:46	Pieter

**Recipients Dialog**

Designations | Teams | Users | Case Teams

Selected:

- Designations
  - Bay of Plenty District Supervisor
- Individual Users
  - BREMERS, Pieter (PIETER)**

Comment for recipients

**Recipient details for BREMERS, Pieter (PIETER)**

Type  Information only  Action

Complete by  Status  Cancel

Can reject

Can forward

Action Officer

Forwarded details

OK Cancel

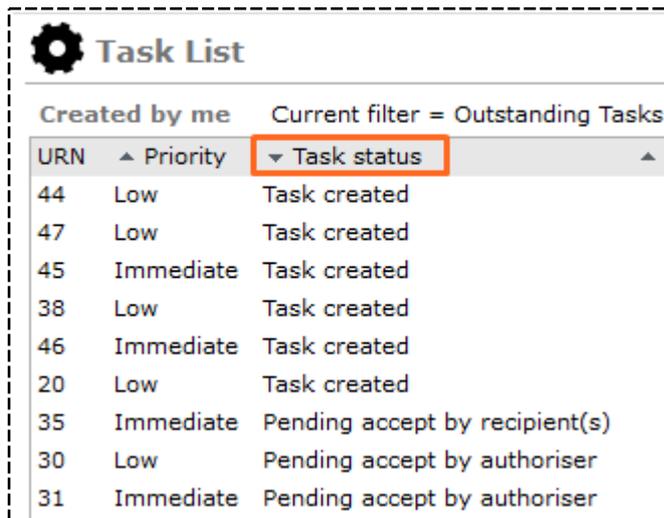
## Delete a Cancelled Task

Previously once a task had been cancelled, you couldn't delete it even if you created it. You can now delete a cancelled task if you created it or if you're the case officer.

## Task List

You can now sort the Task List by selecting a column header:

1. Select **Tasks > List**.
2. To sort by multiple columns, press **Ctrl** + click on each column header.



The screenshot shows a 'Task List' window with a gear icon and the title 'Task List'. Below the title, it says 'Created by me' and 'Current filter = Outstanding Tasks'. The table has three columns: 'URN', 'Priority', and 'Task status'. The 'Task status' column header is highlighted with a red box. The table contains the following data:

URN	Priority	Task status
44	Low	Task created
47	Low	Task created
45	Immediate	Task created
38	Low	Task created
46	Immediate	Task created
20	Low	Task created
35	Immediate	Pending accept by recipient(s)
30	Low	Pending accept by authoriser
31	Immediate	Pending accept by authoriser

## SEARCHING

### Case Note Search

You can search case notes according to their review status:

1. Select **Search > Case Notes** > Select the type of case note you want to search.
2. Expand the **Additional Criteria** section.
3. Select the review status in the drop-down provided.

**General Case Note Search**

**Standard criteria**

Search words

Entity URN

**Additional criteria** ▲

Review status  ▼

**Results**

URN	Title	Case	Actioned Date	Actioned Time	Access Updated

### Export a List of Active Searches

1. Select **System > Active Searches**.
2. Right click the list or select the Options ≡ icon > Select **Export Table to Excel**.
3. Save the spreadsheet to your preferred location > Select **OK**.

**Active Searches**

Entity type	Creator	Created	Expiry date	Title	# Alerts	Description	Visibility
Bomb	JIDOC	22/02/2018	28/02/2018	Bomb	0	Active Search for Bomb	JIDOC
Case File	JIDOC	09/01/2018	27/01/2018	Smith associates	0	people connected to JR Smith	JIDOC
Case File			1/2018	Active Search Smith	1	associates with white subarus	JIDOC
Person			5/2018	In the library	0	With a candlestick holder	Investigation Team 2

Export Table to Excel

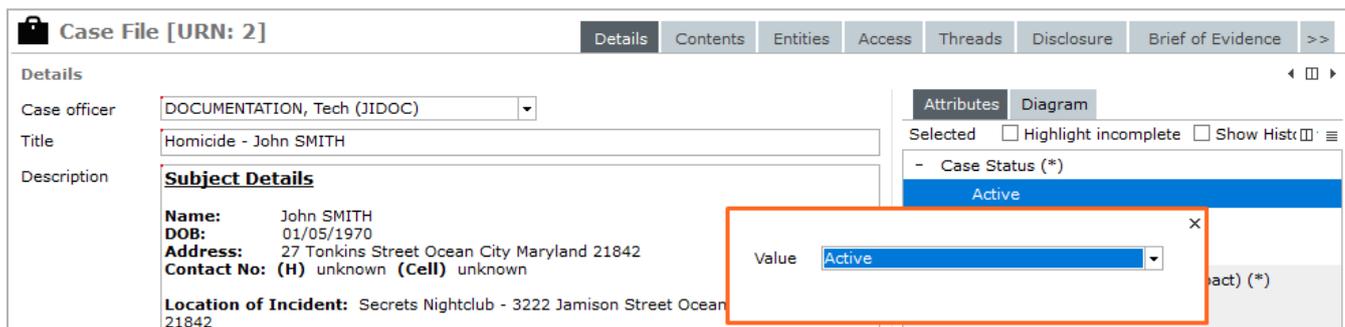
Administrator View

Show Legend

## USER PREFERENCES

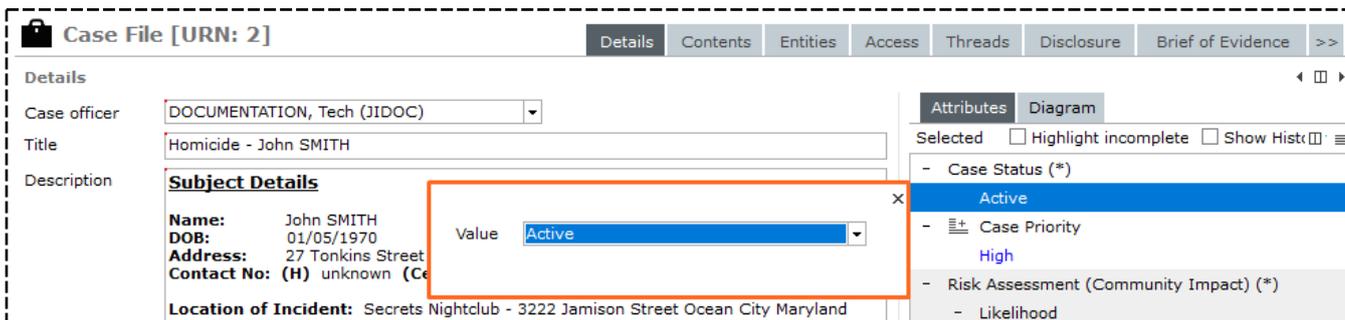
### Attribute Popup Location

By default, attribute popups display below an attribute you select:



The screenshot shows the 'Case File [URN: 2]' interface. The 'Details' tab is active, displaying case information such as 'Case officer: DOCUMENTATION, Tech (JIDOC)', 'Title: Homicide - John SMITH', and 'Description: Subject Details'. A dropdown menu for 'Case Status (\*)' is open, showing 'Active' as the selected option. A red box highlights the attribute popup, which displays 'Value: Active' and a close button (X).

You can have them show on the left instead:



The screenshot shows the same 'Case File [URN: 2]' interface. The 'Case Status (\*)' dropdown is open, showing 'Active' as the selected option. A red box highlights the attribute popup, which displays 'Value: Active' and a close button (X). The popup is positioned to the left of the dropdown menu.

To access this setting:

1. Select your username > Select **Preferences**.
2. Select **Show the attribute popup ...**

3. Select **Save**.

 **Preferences**

---

Save default window state	<input type="checkbox"/>
Save window size and position	<input type="checkbox"/>
Save navigator section states	<input type="checkbox"/>
Save navigator width	<input checked="" type="checkbox"/>
Save notes content on log off	<input checked="" type="checkbox"/>
Confirm on exit	<input type="checkbox"/>
Number of recent entities to keep	<input type="text" value="10"/>

---

Creator automatically added to new case	<input checked="" type="checkbox"/>
Creator automatically added to new incident report	<input checked="" type="checkbox"/>
Creator automatically added to new information report	<input checked="" type="checkbox"/>
Creator automatically added to new asset report	<input checked="" type="checkbox"/>
Creator automatically added to new equipment report	<input checked="" type="checkbox"/>
Creator automatically added to new property report	<input checked="" type="checkbox"/>
Case contents - most recent first	<input checked="" type="checkbox"/>
Automatically refresh case contents	<input type="checkbox"/>
Alert when assigned as case officer	<input type="checkbox"/>

---

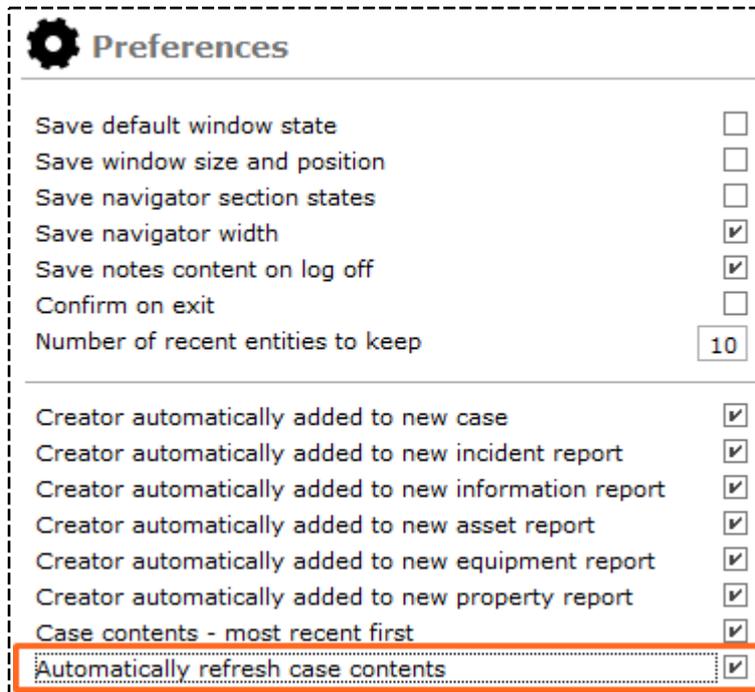
Hide source entity template prompt	<input type="checkbox"/>
Confirm attribute deletion	<input checked="" type="checkbox"/>
Show the attribute popup to the left of the attribute list	<input checked="" type="checkbox"/>

## Option to Refresh Case Contents

The contents of a case no longer automatically refreshes by default.

If you want your case contents to refresh automatically:

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



The screenshot shows the 'Preferences' dialog box with a gear icon and the title 'Preferences'. It contains a list of settings with checkboxes and a text input field. The 'Automatically refresh case contents' option at the bottom is highlighted with a red box.

Setting	Value
Save default window state	<input type="checkbox"/>
Save window size and position	<input type="checkbox"/>
Save navigator section states	<input type="checkbox"/>
Save navigator width	<input checked="" type="checkbox"/>
Save notes content on log off	<input checked="" type="checkbox"/>
Confirm on exit	<input type="checkbox"/>
Number of recent entities to keep	10
Creator automatically added to new case	<input checked="" type="checkbox"/>
Creator automatically added to new incident report	<input checked="" type="checkbox"/>
Creator automatically added to new information report	<input checked="" type="checkbox"/>
Creator automatically added to new asset report	<input checked="" type="checkbox"/>
Creator automatically added to new equipment report	<input checked="" type="checkbox"/>
Creator automatically added to new property report	<input checked="" type="checkbox"/>
Case contents - most recent first	<input checked="" type="checkbox"/>
<b>Automatically refresh case contents</b>	<input checked="" type="checkbox"/>

## ADMIN

### New Licence Requirements

You'll need a new licence to use ICM 6.1.

If you haven't got your new licence yet, please email [icmsupport@jadeworld.com](mailto:icmsupport@jadeworld.com) and let us know if you want the following modules:

- Brief of Evidence Preparation
  - Property (Evidence) Management
- There's no charge for these extra features.

To load your new licence:

1. Select **Admin > System > Licence**.
2. Select **Load**.

**Licence Details**

**Details**

Licence name

Expiry date

Concurrent users

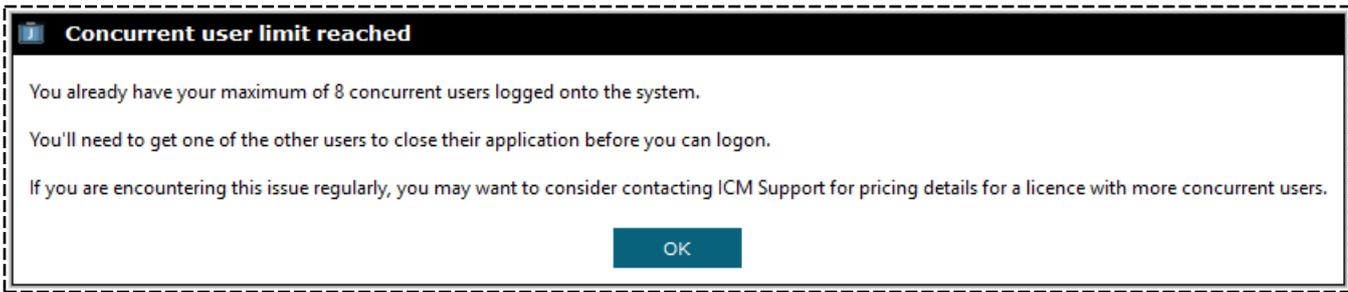
**Modules**

Brief Preparation

Property Management

3. Locate and select your licence file.
4. Select **Open**.
5. Select **Apply** to load your licence.

The new licence includes the number of concurrent users allowed. Logon attempts beyond this limit will be blocked.



There's a 10-week grace period to load your licence once you've upgraded to 6.1. After that you'll need to contact ICM Support to log in to ICM.

## Data Access Whitelist

In ICM release 6.0.2 we introduced Permanent Access. This is high level data access you can give to users, teams, and designations for:

- Information reports
- Incident reports
- Case notes

You can also use the permanent access feature to block users, teams, and designations from these types of source entities.

In release 6.1 we address the need to block access to all users, teams, and designations except those on a whitelist.

You can make the Permanent Access list a whitelist.

For an agency, this means when you create new teams, users, or designations you don't have to block new teams and users from these source entities.

To access this change:

1. Select **Admin > Entity Definition > Types**.
2. Open the type of information report, incident report, or case note you want to edit.
3. Select the **Security** tab.
4. Select the designations, teams, and users that should have permanent access to this type of entity.
5. Select **White List**.
6. Select **Save**.

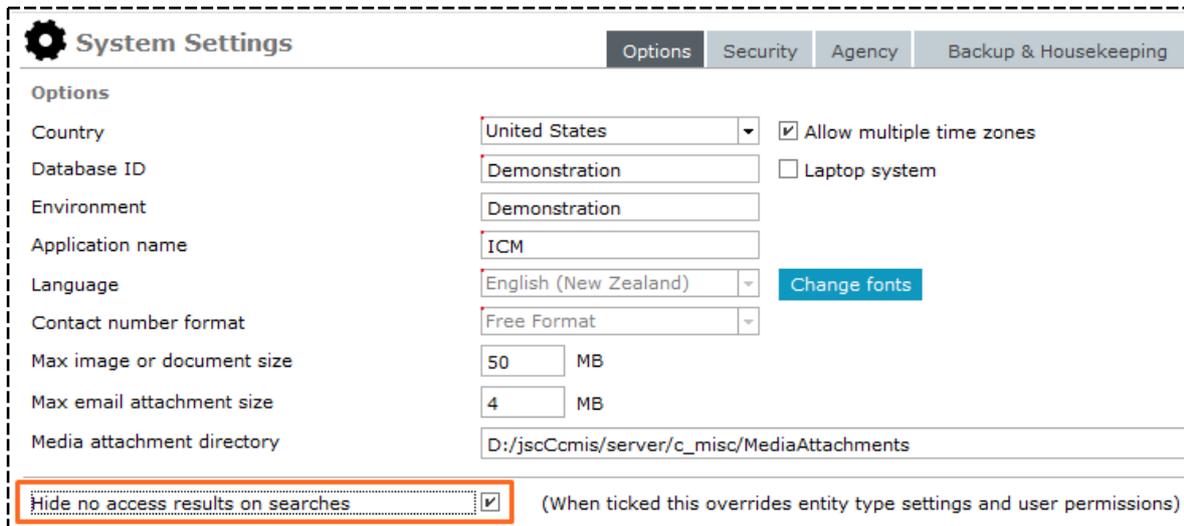


## No Access Results

You can set the visibility of **No access results** at various levels:

- **User/team/designation level**
- **System level**

When this is set, it overrides all other settings. **No access results** will never be shown.



The screenshot shows the 'System Settings' interface with the 'Options' tab selected. The 'Hide no access results on searches' checkbox is checked and highlighted with a red box. The text '(When ticked this overrides entity type settings and user permissions)' is visible to the right of the checkbox.

System Settings		Options	Security	Agency	Backup & Housekeeping
Country	United States	<input checked="" type="checkbox"/>	Allow multiple time zones		
Database ID	Demonstration	<input type="checkbox"/>	Laptop system		
Environment	Demonstration				
Application name	ICM				
Language	English (New Zealand)				<a href="#">Change fonts</a>
Contact number format	Free Format				
Max image or document size	50 MB				
Max email attachment size	4 MB				
Media attachment directory	D:/jscCcmis/server/c_misc/MediaAttachments				
<b>Hide no access results on searches</b>		<input checked="" type="checkbox"/>	(When ticked this overrides entity type settings and user permissions)		

- **Entity type level**

This is for types of:

- Case notes
- Incident reports
- Information reports
- Tasks
- Task results

When this is set, **No access results** won't be shown for the entity type selected.

This overrides any setting that has been configured at the user/team/designation level.



The screenshot shows the 'General Case Note Entity Type' interface with the 'Options' tab selected. The 'Hide no access results on searches' checkbox is checked and highlighted with a red box.

General Case Note Entity Type		Details	Icons	Entity types	Relationships	Security	Usages	Options
Options								
Default classification								
<input checked="" type="checkbox"/>	Display warning when another user is updating							
<input checked="" type="checkbox"/>	Hide no access results on searches	<input type="checkbox"/>	Exclude from duplicate identification	<input type="checkbox"/>	Can only be created from a Case Note	<input type="checkbox"/>	Check access at run time	
<input checked="" type="checkbox"/>	Allow file upload	<input checked="" type="checkbox"/>	Allow bulk upload					
<input checked="" type="checkbox"/>	Default to 'No review required'							

- **User/team/designation level**

There's a new permission called **Can see No Access Results on searches** that admin users can give to a role.

Any user/team/designation with this role will be able to see **No Access Results** on any search (unless overridden by higher-level settings).

*This is positive granting of permission to see **No access results**, not higher-level negative hiding of **No access results**.*

## Conditional Attributes

A conditional attribute will be removed when:

- The parent attribute value is changed.
- The parent attribute is deleted.

Each of these has an associated checkbox. In release 6.1, the default value of both checkboxes is set to true.

*Several agencies have requested this.*

### Maintain Condition

Attribute selected:

Operator:

Value:

Conditional Attributes

- Priority
- M - Mandatory Category Offence
- C - Critical Offence Category
- P - Priority Offence Category
- V - Volume Offence Category
- Impact (Society / Client)
- Response Required
- Duration (Expected)
- Source
- Case Assignment Details
  - Team/s Assigned
  - Officer/s Assigned
  - ITC-1430
- Investigation Review Date
- Asset Recovery Consideration
- Value (Expected in \$)
- Reason Not Pursued
- Asset Recovery Status
- Value (Actual in \$)
- Carol test warning
- Carol test Text
- carol test date/time
- Reference No

Maintain Values

Delete conditional attributes:

- on attribute value change
- on attribute removal

Apply Cancel

## URN Format Definition

We've added a **Random Identifier** field which you can use when setting up the format of a URN.

If you select the **Random Identifier** drop-down, you need to specify the number of digits the random number will use.

In the following example, the **Random Identifier** has five digits.

 **Person**
Details Icons

---

**Details**

Category  New Category

Override search before new entity

Hide no access results on searches

Allow direct entity edit

---

**Unique reference number (URN)**

Next URN  10 of a maximum 30 characters

Text

Sequence Number

Text

Random Identifier

 **Person Search**
Standard Attributes Advanced

---

**Standard criteria**

Search words

Entity URN   /   Use Key

**Additional criteria** ▾

Results (13)    No Access Results (0)

URN	Surname	Given 1	Given 2	Given 3	D.O.B.	D.O.D.	Gender	Title
PER/11/42101	HAWKIN	Richard	peter		25/07/1962	09/09/2009	Male	Mr
PER/40/47730	CROUCH	Peter	sid		01/02/2017		Unknown	
PER/80/54279	THOMPSON	Peter	Wilson				Male	Mr
PER/189/36584	HAWKIN	Peter					Unknown	
PER/382/72408	KERSHAW	Tim	Peter	Given	05/03/1989		Male	Mr
PER/474/65574	TEST	Peter	ttt				Male	Mr
PER/500/33621	STONE	peter					Unknown	
PER/2483/28152	WHITE	PETER			01/11/1970		Male	Mr

The following business rules apply to entities where the entity type has a Random Identifier component in the URN format:

- Random IDs are unique within an entity type.
- If the entity doesn't have a random ID (entities created before the 6.1 upgrade, for example), you

can change the random ID any time by entering it manually or getting ICM to regenerate it.

**Person [URN: PER/500/02519]**

**Details**

Random Id:  Change Generate

STONE, peter (Unknown)  
D.O.B.:  
D.O.D.:  
Classification:  
Open release: No    Limited release: No    Fictitious: No

**Relationships** | Relationship summary | History | Involvements | Phase & LOE

Display duplicate relationships Filter

Relationship	To	URN	Entity	Start
is related to in some	IMG-602		an image for Peter Stone	

- Information Report  
Steves Information Report

## Permission to Delete a Data Export Template

Previously only the person who created a template for exporting data from search results could delete it. Your ICM system administrator can also delete these templates now.

## It's Easier to Find a Team You're Managing

When you're setting up teams, just enter the first few characters of the team – The cursor will jump to the nearest match.

This functionality was previously only available for managing users.

You can access it under **Admin > Security > Teams**.

**Team Maintenance** Roles Users **Teams** Designations

Select and enter details below

Description

- All Users
- Executive**
- Investigation Team 1
- Investigation Team 2
- Investigation Team 3
- Operation TUI [deactivated]
- Surveillance Operatives