Investigations Case Management
- Release Notes

VERSION 6.1

jade™

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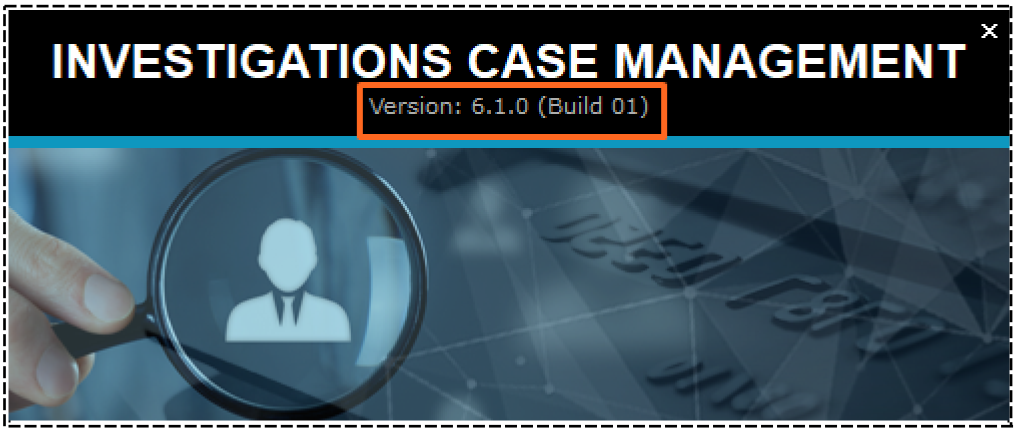
Overview

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

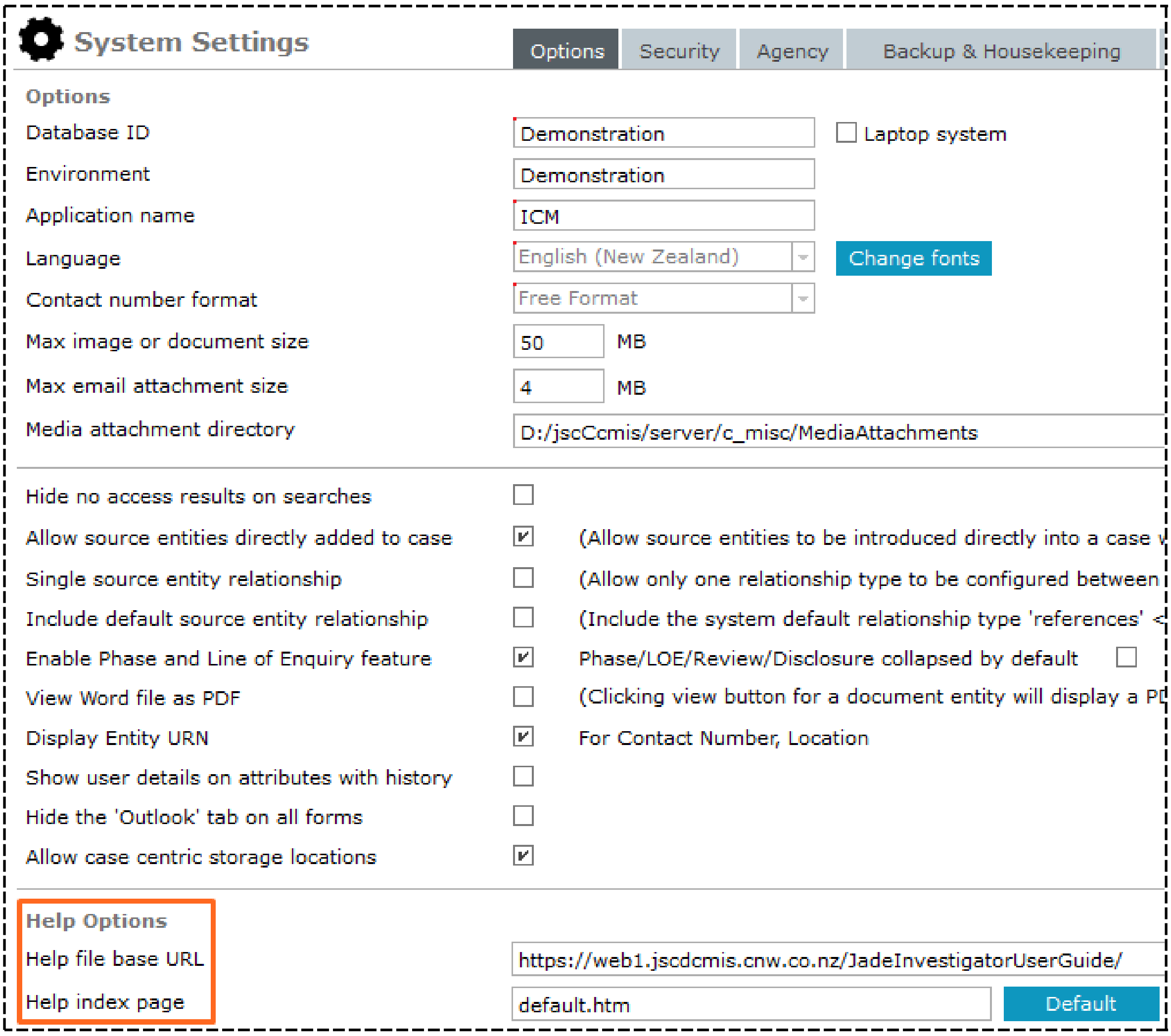


Download the Latest Help File

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.



ENTITIES

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.

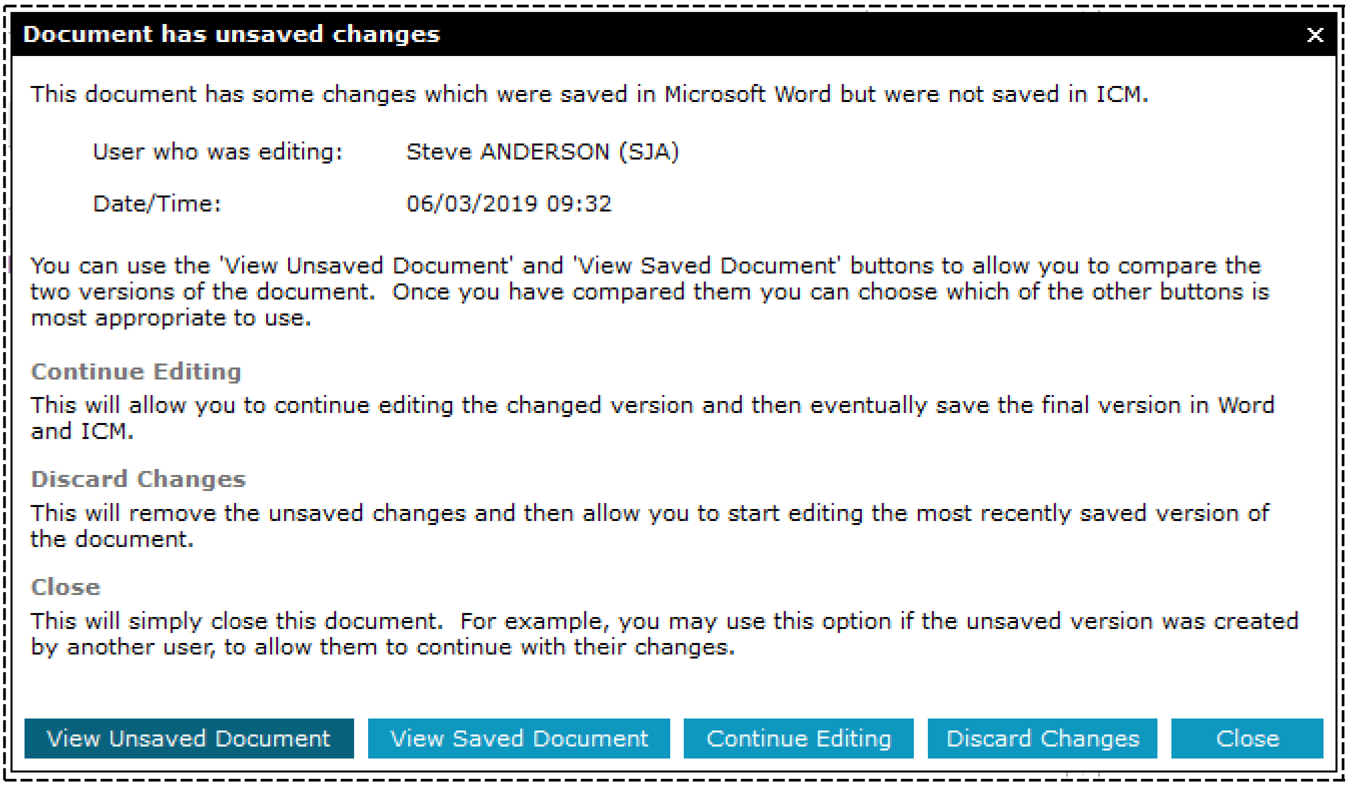
The author thought the document was saved according to the normal save options in Word, but it wasn't committed to the database yet. Saving the ICM document entity does this.

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:

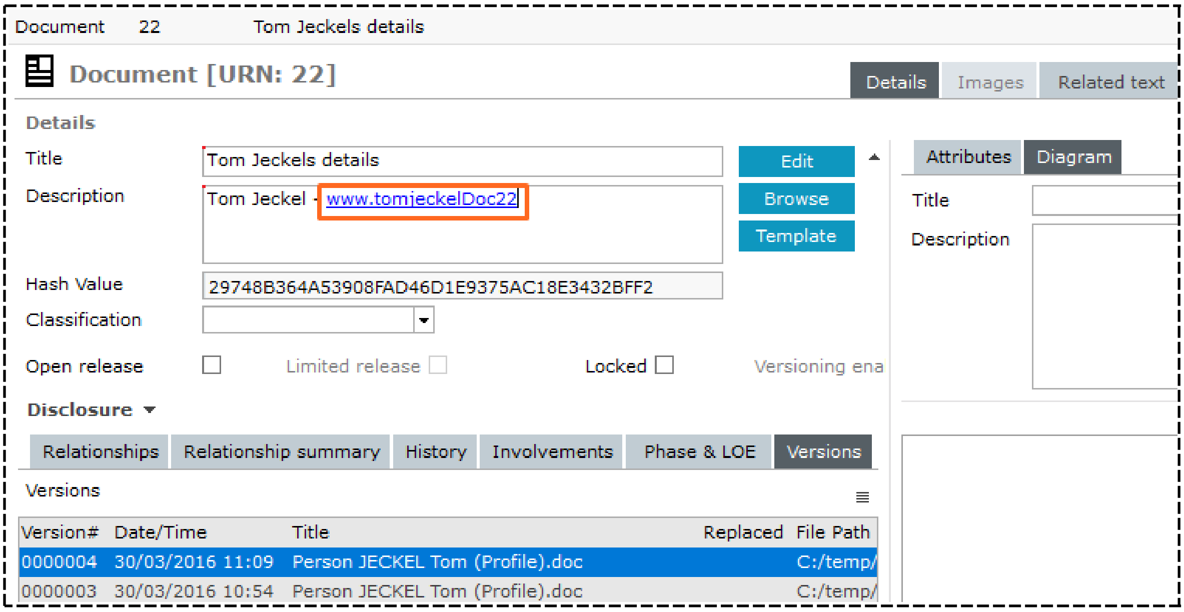
Continue Editing	Continue editing the changed version and save the final version in Word and ICM.
Discard Changes	Remove the unsaved changes and start editing the most recently saved version of the document.
Close	Close the document. For example, you might use this option if the unsaved version was created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



Link to a Document

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

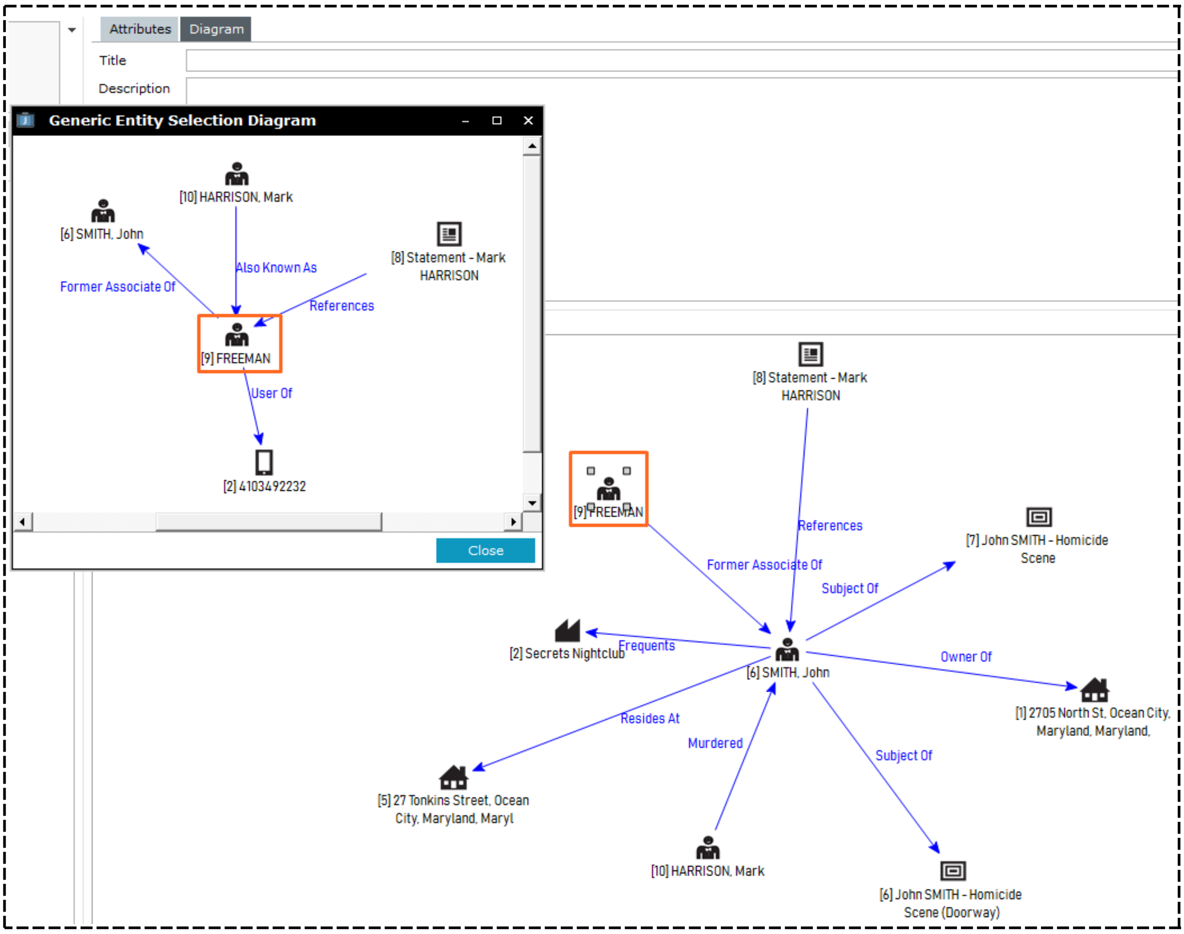
1. Open a document entity.
2. Select the Expand section ▲ icon in the **Details** section.
3. Enter the link to your document in the **Description** field.



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**.

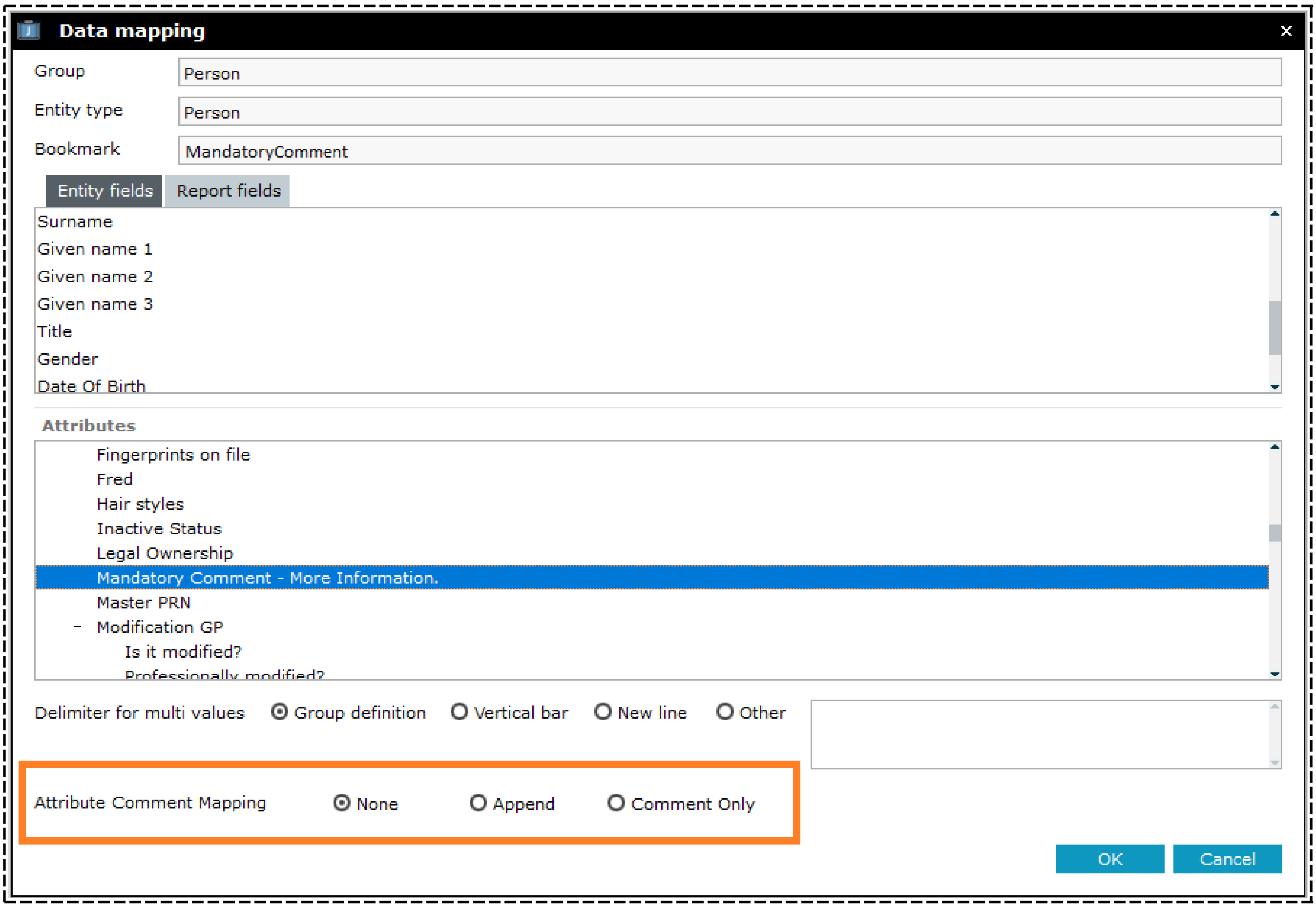


Bookmarked and Entity-based Word Reports

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:

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



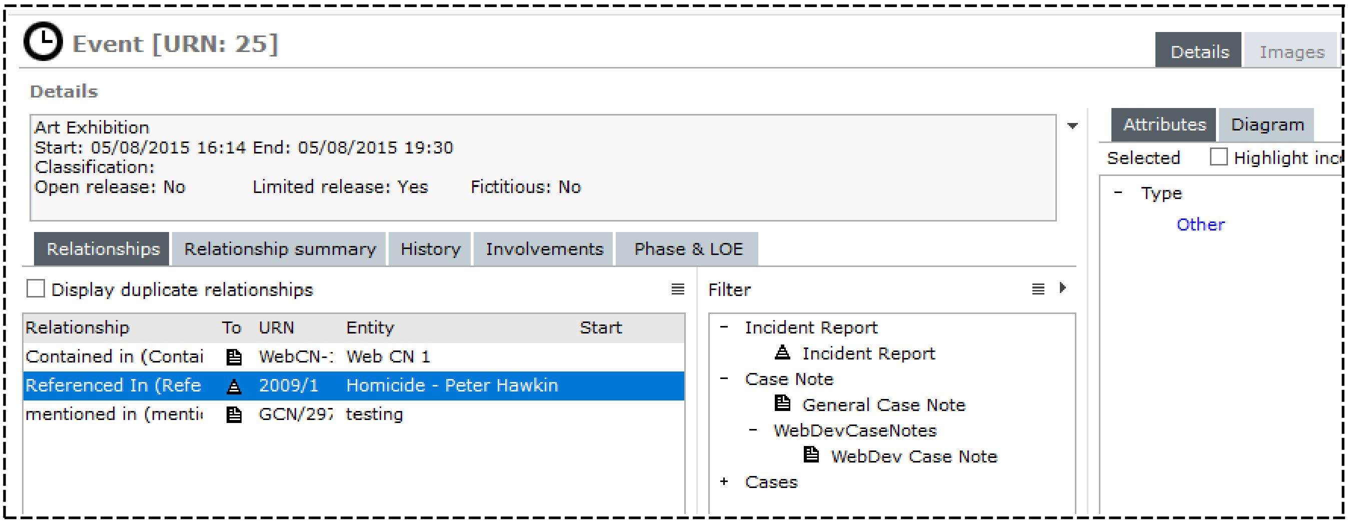
Limited Release Entities

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.

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.



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.

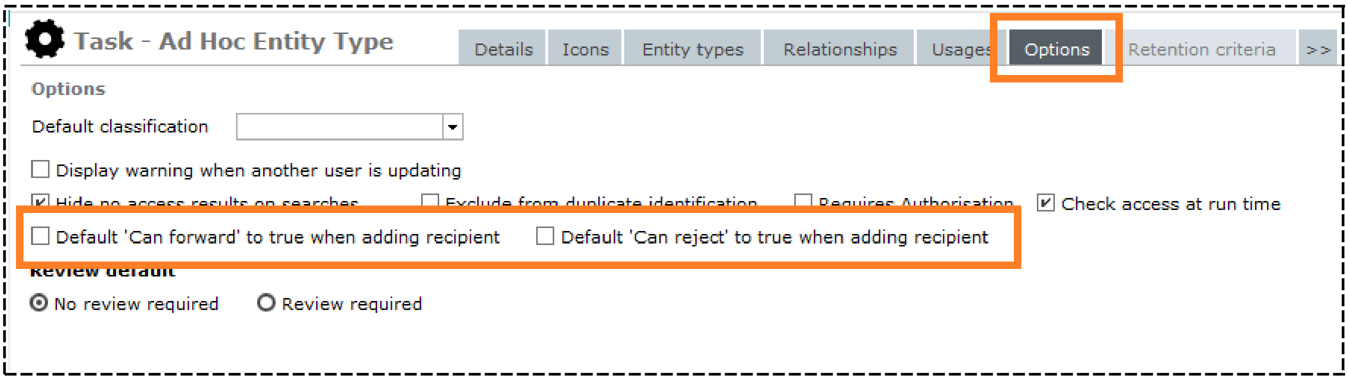
TASKS

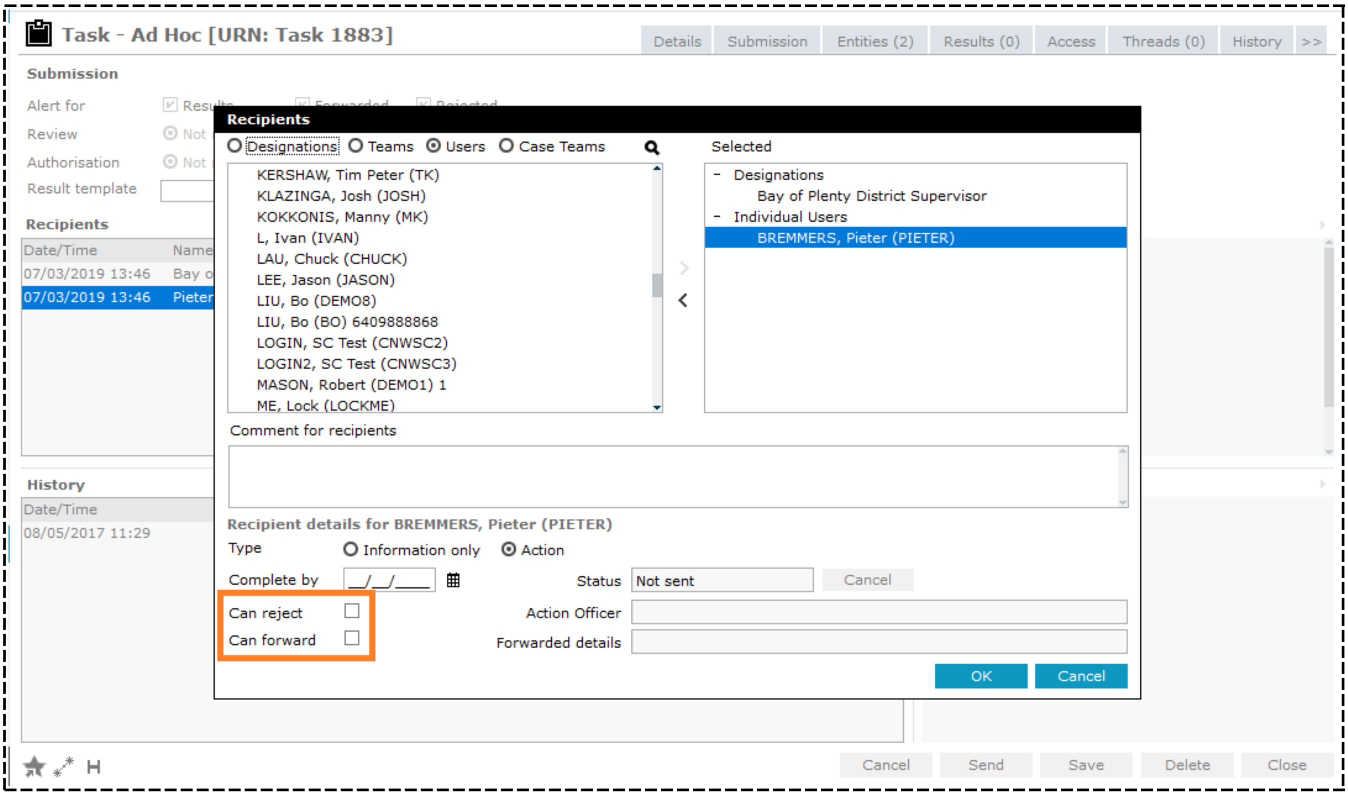
Set the Default Value for Can Reject or Forward

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.





Delete a Cancelled Task

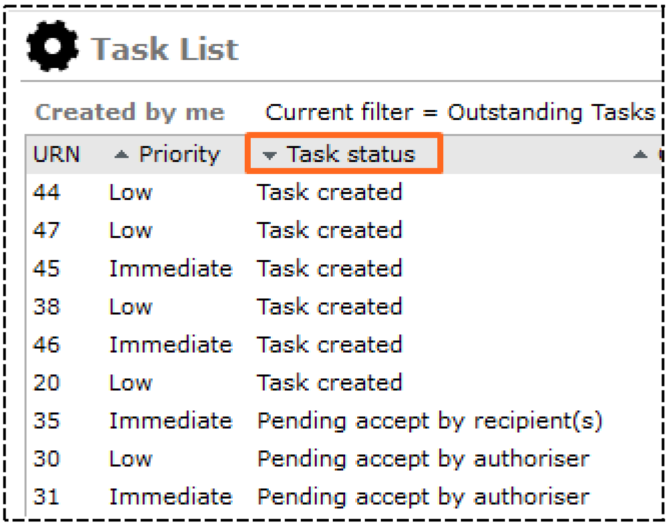
Previously once a task had been cancelled, you couldn't delete it even if you created it.

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.

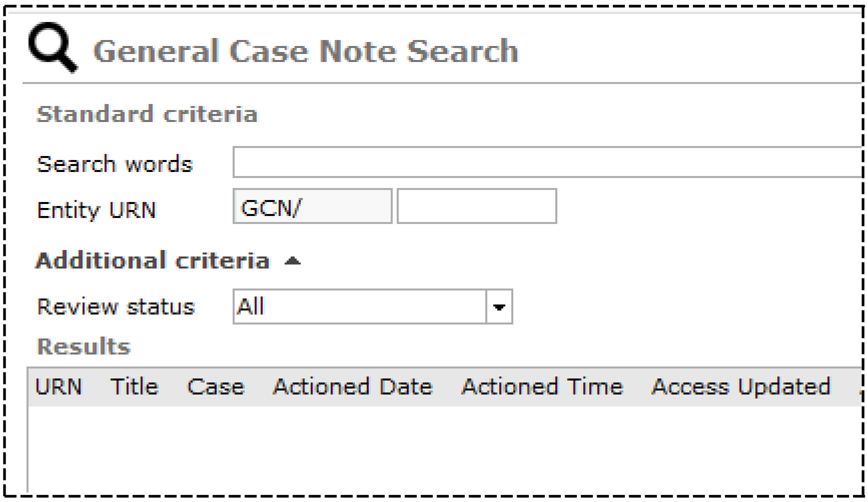


SEARCHING

Case Note Search

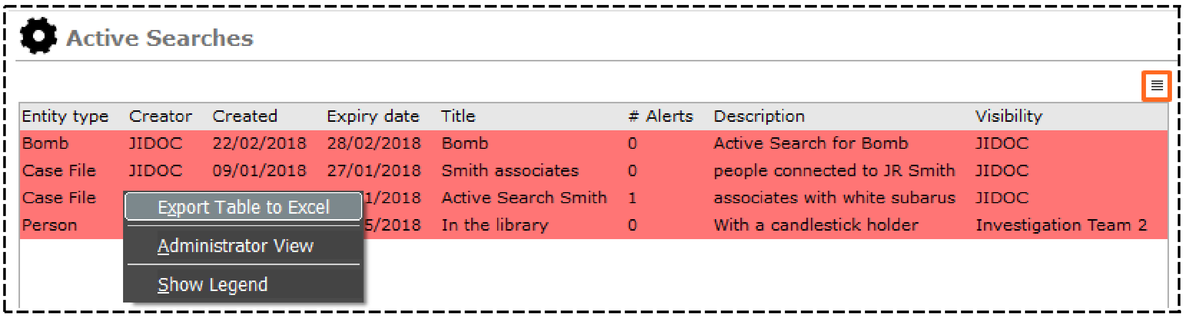
You can search case notes according to their review status:

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.



Export a List of Active Searches

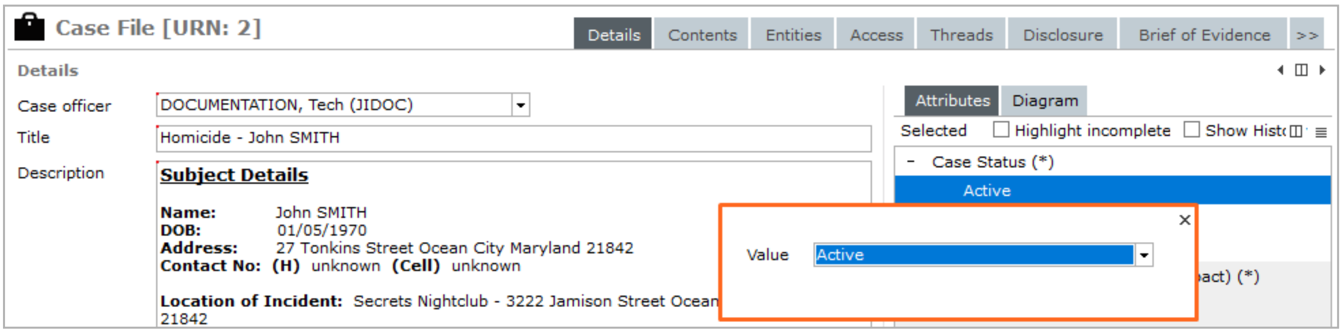
1. Select **System** > **Active Searches**.
2. Right click the list or select the Options ≡ icon > Select **Export Table to Excel**.
3. Save the spreadsheet to your preferred location > Select **OK**.



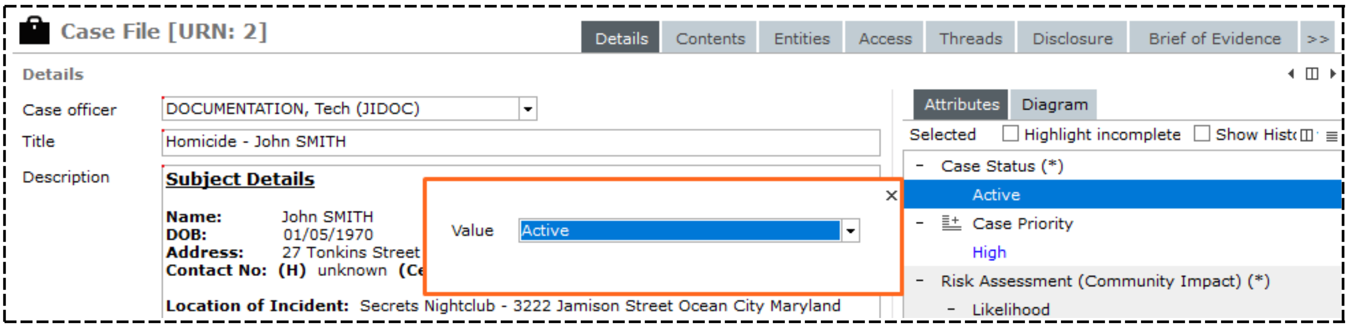
User Preferences

Attribute Popup Location

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



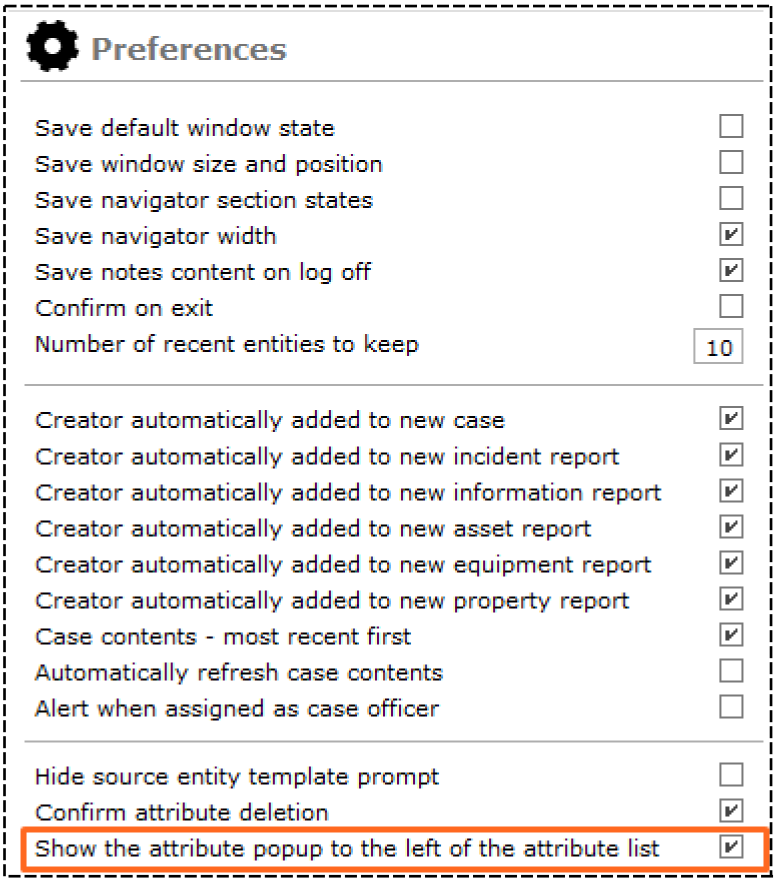
You can have them show on the left instead:



To access this setting:

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

3. Select **Save**.

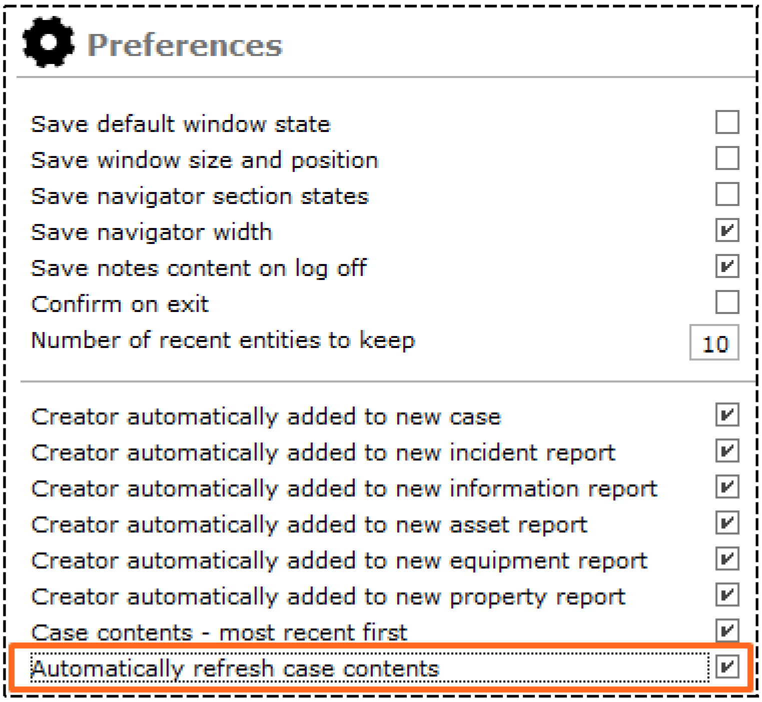


Option to Refresh Case Contents

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**.



Admin

New Licence Requirements

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

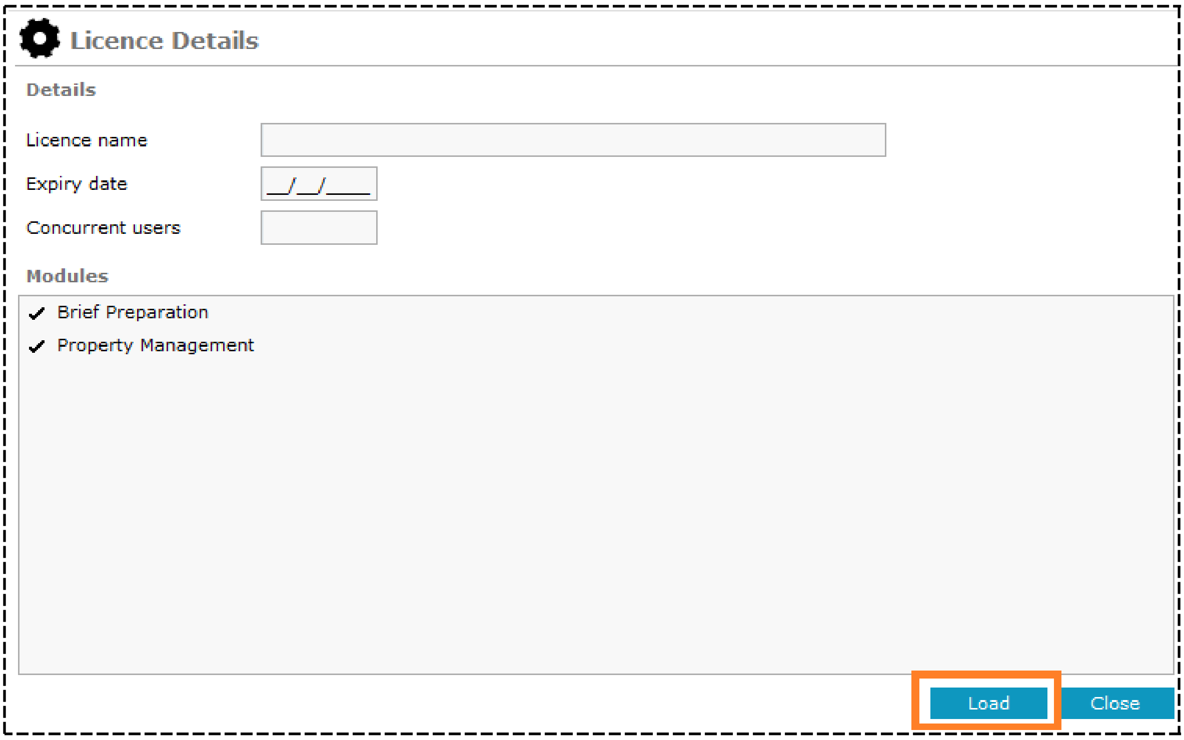
If you haven't got your new licence yet, please email icmsupport@jadeworld.com and let us know if you want the following modules:

- Brief of Evidence Preparation
- Property (Evidence) Management

  There's no charge for these extra features.

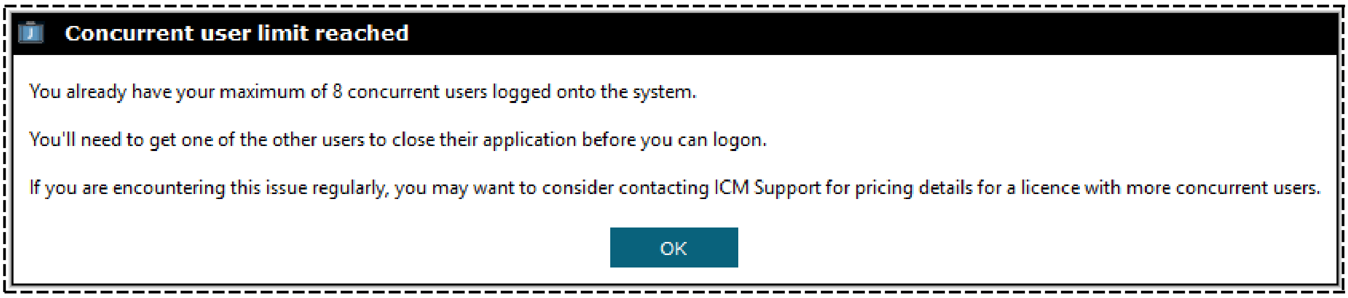
To load your new licence:

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



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:

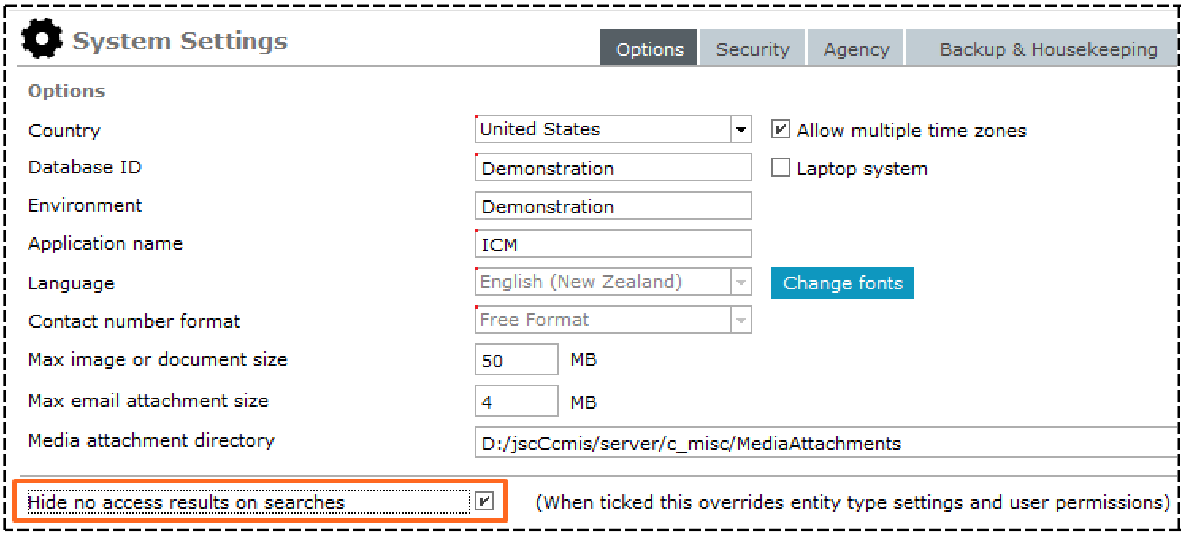
1. Select **Admin** > **Entity Definition** > **Types**.
2. Open the type of information report, incident report, or case note you want to edit.
3. Select the **Security** tab.
4. Select the designations, teams, and users that should have permanent access to this type of entity.
5. Select **White List**.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



- **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.

- **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**.*

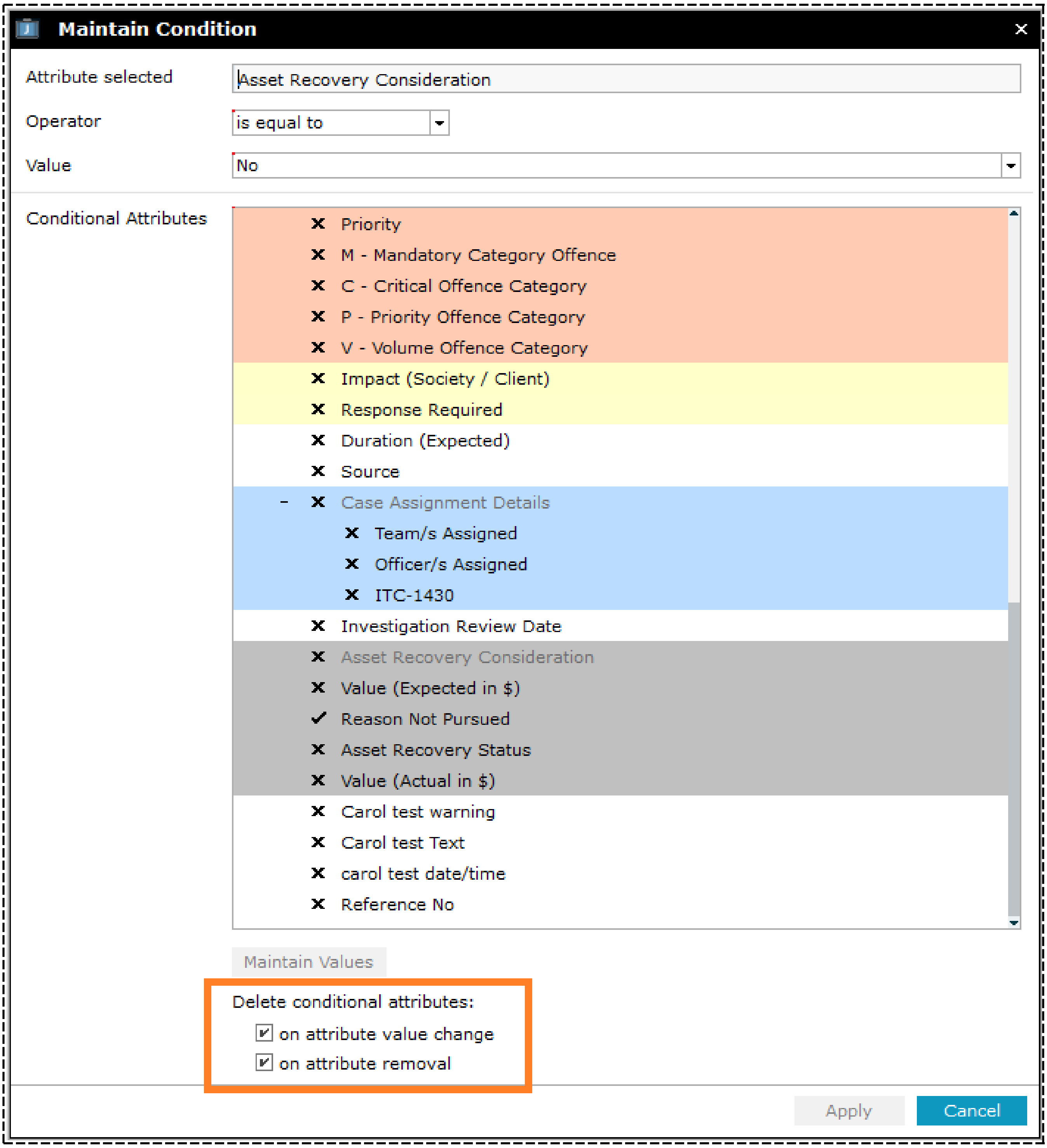
Conditional Attributes

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.

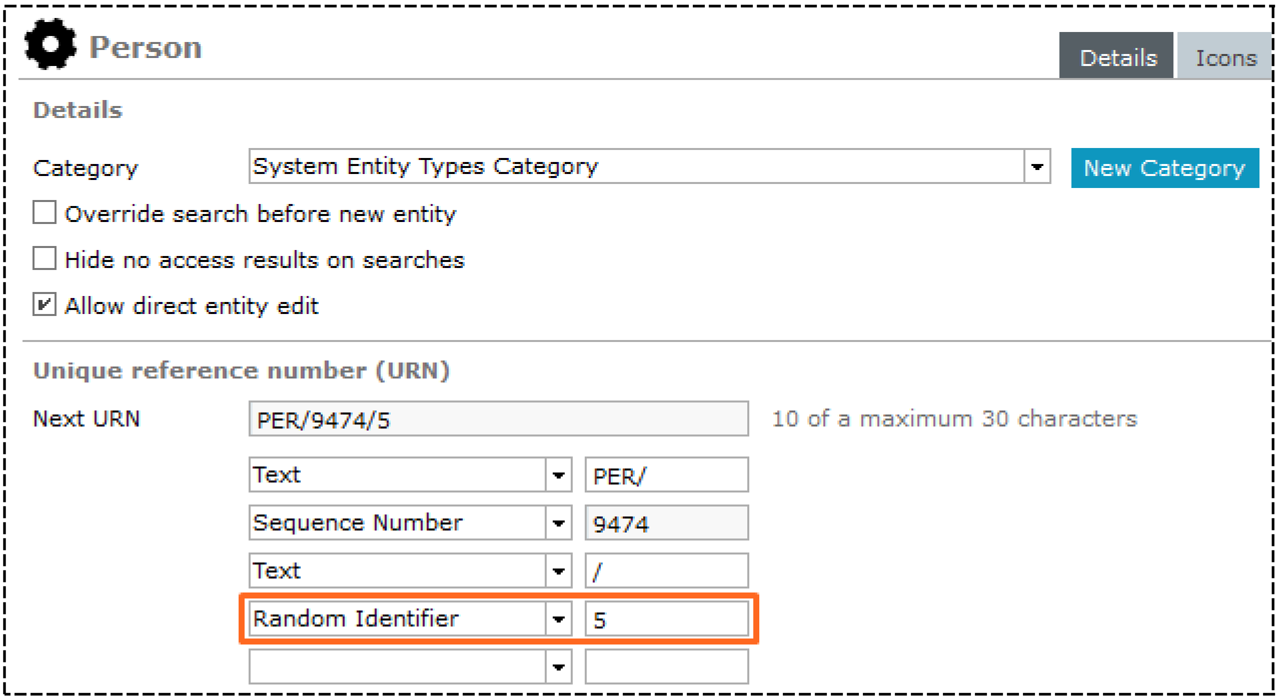


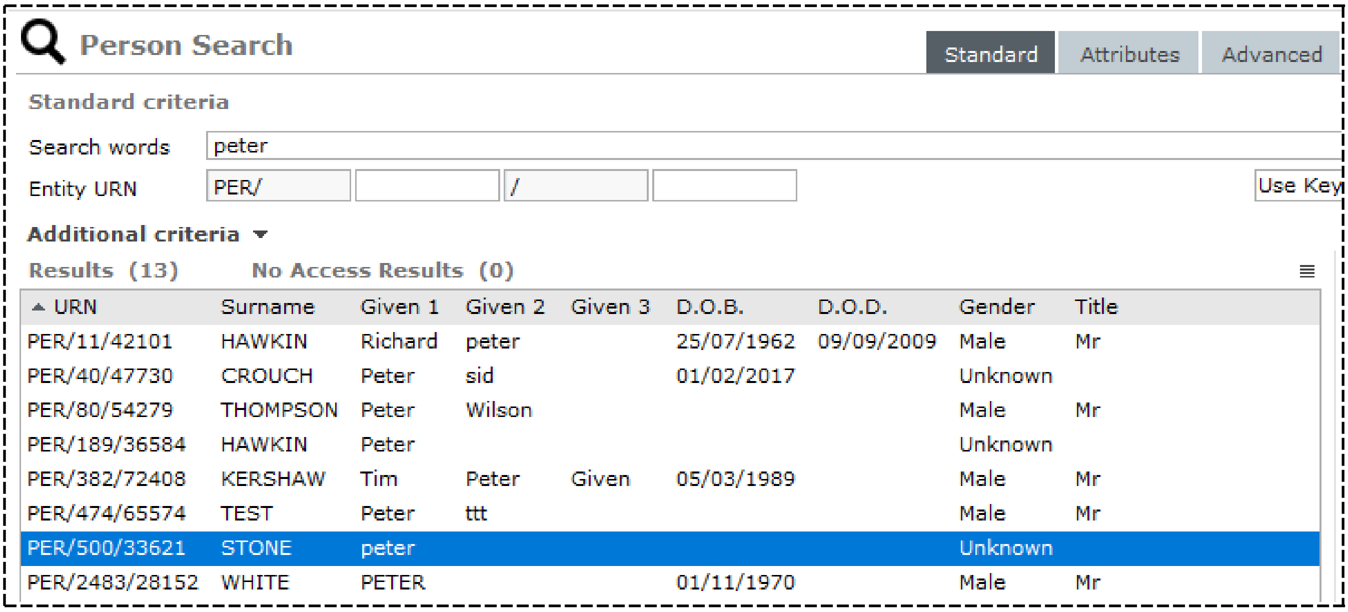
URN Format Definition

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.

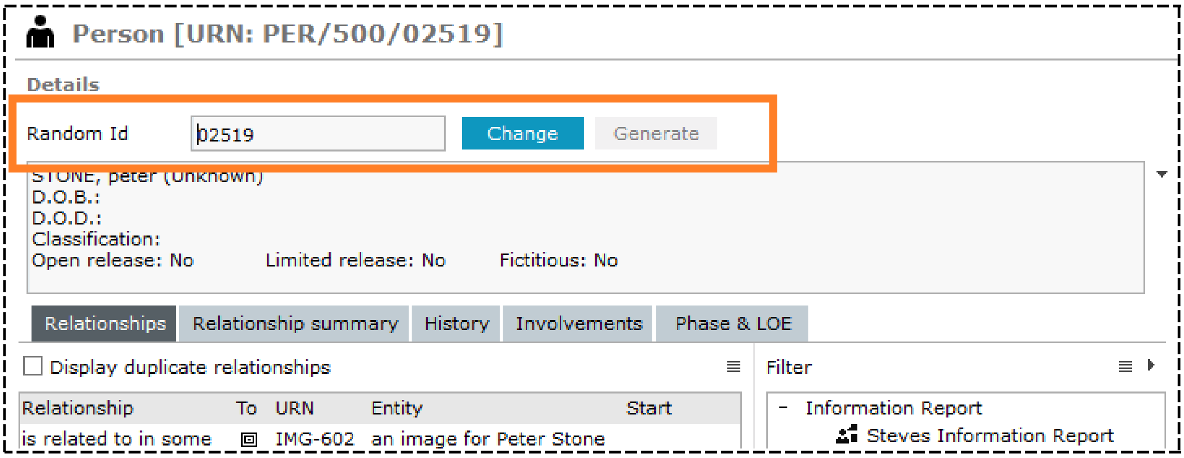




The following business rules apply to entities where the entity type has a Random Identifier component in the URN format:

- 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.



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**.