

VERSION 6.1.1

## **jade**"

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Overview

#### **OVERVIEW**

This document explains the new features available in the 6.1.1 release of Investigations Case Management (ICM).



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#### CASES

#### Threading

#### See Case Notes for Threaded Relationships in a Case

You can see the case notes for threaded relationships in a case:

- 1. Open a case.
- 2. Select the **Contents** tab > Select the **Threads** subtab.
- 3. Right-click a thread relationship > Select **Show Case Notes** > Select the type of case note you want to see.



#### Thread a Case Note to a Selected Source Entity

You can thread a new case note to a selected source entity. This makes sure the case note goes exactly where you want it to in the hierarchy.

*Previously the new case note would be threaded to the open case note – Surveillance Activity [URN:1] in this example. It will now be threaded to* **Surveillance of ABC Electronics**.

Surveillance Activity [U	Details	Entities (0)	Access	Tasks (0)	Threads (*)					
Threads										
- 🗎 [1] Relevant Incident Reports /	Case Notes Identified									
▲ [0001/1] Property Theft - Firearm AD56789Z35A										
▲ [0002/2] Vehicle Theft - SM2332										
[1] Forensic Examination Result - SM2332										
- 🗎 [8] Enquiries Conducted at	- 🖺 [8] Enquiries Conducted at ABC Electronics Salisbury									
- 🖺 [9] Telephone Intercepti	- 🖺 [9] Telephone Interception of ABC Electronics Established									
- 🖺 [1] Call to ABC Elect	ronics by Freeman 09:10 10	Sept 2007								
+ 🖺 [4] Obtain PIN Re	gister for 4103492232									
- 🖺 [1] Surveillance o	f ABC Electronics									
+ 🖺 [53] Case not	a <u>N</u> ew									
+ 🗎 [2] Call to ABC Elect	ronics by Freeman E <u>d</u> it									
	Show	Logond								
L <sup> </sup>	511000	Legenu								

#### Use Drag and Drop to Manage Threads

When you're threading source entities, you can use drag and drop as an alternative to right-clicking.

Simply drag and drop an item in the **Source entities with no parent thread** panel onto the **Existing thread relationships** panel.



#### **See Which Users Have Access to Cases**

To audit the security configuration in ICM, auditors need a report that shows who has access to a case and in what capacity – As an individual user, or as a member of a team or designation.

The Case Access Summary report shows who can access an investigation. This includes the name of the user, team, designation, and their role in the case.

To access this report:

- 1. Select Cases > Case Access Summary.
- 2. Select **Browse** to specify where you want to save the file > Select **Save**.
- 3. Use the Selection  $\triangleright$   $\triangleleft$  arrows to select the information you want to export.

#### 4. Select Export.

ſ	AutoSave 💽 Off	ا ⊟	• ¢ • =					Case	AccessSummary.csv	- Excel				Π		ľ
	File Home	Insert	Page Layout	Formulas	Data	Review	View Help	Acrobat	Q Tell me what y	ou war	nt to do					
	Cut	Cali	ibri •	r 11 ▼ A*	≡	= **	ab C+ Wrap Te	xt	General	Ŧ	<b>≠</b>			<b>€</b> □=	<b>*</b>	,
P	aste 💉 Format Pa	inter B	I <u>U</u> •	- 👌 - 🗚	• = =	= =   •= =	📃 🗮 Merge 8	& Center 🔹	\$ • % • <b>5</b> .00	.00 →.0	Conditional Formatting *	Format as Table -	Cell Styles ≠	Insert •	Delete Fo	rm T
<u> </u>	Clipboard	Fa	Font		ra l	AI	ignment	G.	Number	Es.		Styles			Cells	
4	×1 •	$\times$	√ f <sub>×</sub> (	Case Type												
	A	В		с			D	E	F		G				н	
1	Case Type	URN	Title			Users		Teams	Case Teams	De	signations		All use	ers		
2	Homicide File	2014-1	Operation H	lagley		BRIAN, Clar	k		Records Manage	er Di	rector Intel	ligence	BRIAN	, Clark	(User)	
3	Homicide File	2015-2	Hit and Run	Ferry Road		DOCUMENT	ATION, Tech						DOCU	MENTA	TION, Tec	h
4	Homicide File	2014-1	Operation H	lagley		BRIAN, Clar	k		Records Manage	er Di	rector Intel	ligence	BRIAN	, Clark	(User)	

#### **Export Case Phase or LOE from a Case**

If you search within a case and want to export the results, you can include Phase and Lines of Enquiry (LOE) data in the export.

Export	Search Results For Pers	son	
Details			
Export file			
File name			
Format	O Tab separated (TSV)	O Comma separated (CSV)	• Excel (xlsx)
Attributes Sel	lection		
Unselect all	Include history O Partial	O Full Include Commen	ts 🗌 Show full
	Include Multiples	Include Entity ID	
<ul> <li>Fictitious</li> <li>Related (</li> <li>Pelated (</li> </ul>	Cases Source Docs		
<ul><li>Lines of I</li><li>Phases</li></ul>	Enquiry		
<ul> <li>Sumane</li> <li>Given na</li> </ul>	; ime 1		

#### **Open the Originating Source Entity for a Case**

If you created a case from a source entity—like an incident report, for example—you can open the originating source entity from that case from the Overflow >> tab. You don't have to go to the **Contents** tab.

Threads	Disclosure	Brief of Evidence	>>
Diagram ] Highlight in pen	Search History com <u>W</u> atch Refere Case / <u>C</u> lose	h within y es enced Cases Admin Case	
	Go to Discle Storag	originating source ent sare Bulk Sign Off ge Locations	ity

#### More Users Can Submit Case Notes for Review

Previously, only the person who created a case note could submit it for review and select someone to review it.

Now other people assigned to the case can submit a case note for review.

To do this, they need the new Can submit case note for review permission.

To access this permission:

- 1. Open a case.
- 2. Select the **Access** tab.
- 3. Select a team, designation, or individual user.
- 4. Toggle the icon beside the **Can submit case note for review** permission to give the permission to a person or team.



#### **Case Note Review Setting**

When you create a case note, you no longer have to manually select the **No review required** checkbox.

By default, case notes don't have to be reviewed.

You change this by editing the type of case note:

- 1. Select Admin > Entity Definition > Types.
- 2. Expand the type of case note.
- 3. Select Edit.
- 4. Select the **Options** tab.
- 5. Select the **Default to 'No review required'** checkbox.

General Case Note Entity Type	Details	Icons	Entity types	Relationships	Security	Usages	Options		
Options									
Default classification									
Display warning when another user is updating									
$\Box$ Hide no access results on searches $\Box$ Exclude from duplicate identif	fication	🗌 Can	only be created	from a Case Note	e 🗌 Che	eck access	at run time		
Allow file upload     P Allow bulk upload									
Default to 'No review required'									

#### **The Disclosure Tab Opens Quicker**

In cases that had more than several thousand case notes, the **Disclosure** tab was loading slowly. We've sped this up.

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Cases

#### **Specify When People Need to Enter Comments** for a Disclosure

For managing a disclosure, a case officer can specify when people in your organisation need to enter comments:

- 1. Open a case.
- 2. Select the **Disclosure** tab.
- 3. Select the **Options** subtab.
- 4. Select the checkboxes when you want people to enter comments:
  - Finalising a Disclosure Index
  - Unfinalising a Disclosure Index
  - Verifying a Disclosure Index
  - Unverifying a Disclosure Index
  - Rejecting a Disclosure Index

Case File [URN: 2]	Details	Contents	Entities	Access	Threads	Disclosure			
Disclosure									
Options Indexes Disclosure Items Schedules									
Verification									
Requires 0 verifiers									
Comments									
Show Comments box when Finalising a Disclosure Index									
🕑 Show Comments box when Unfinalising a Disclosure Index									
✓ Show Comments box when Verifying a Disclosure Index									
✓ Show Comments box when Unverifying a Disclosure Index									
✓ Show Comments box when Rejecting a Disclosure Index									

Entities

#### **ENTITIES**

#### **Entities Won't Automatically Be Merged**

We're improving the entity merging utility. These enhancements will be released as a hotfix to ICM 6.1.1.

In the meantime we've disabled the ability to merge entities. This is under **System** > **Tools** > **Match and Merge (Auto)**.

Match	and Me	rge										
Entity I	уре	Perso	۱		•	Screen 1 of 59	9					
						First	Previous	lext L	ast			
Result	5									Additional detail		
Inique	Master	Slave	URN	Classification	Title	De	scription	I	D^			
			Perso52		ANDREW Zack	AN	IDREW Zack					
			Perso53		DOE Rhys	DC	DE Rhys					
			Perso90		ANDERSON Steve	AN	IDERSON Steve					
$\checkmark$			Perso93		aaa	aa	aa	1	tr			
	~		Perso294	Unclassified	ANDREWS Sarah Ellen	n Ms	ANDREWS Sarah E	llen				
			Perso463		ANDREW Zack	AN	IDREW Zack					
		✓	Perso9425	;	ANDREW Zack	AN	IDREW Zack					
			Perso91		PATEL Hiren	PA	TEL Hiren					
			Perso39		LEE Jacky	LE	E Jacky					
			Perso92		LIU Bo	LIU	J Bo					
			Perso363		LINCOLN Abe	LIM	NCOLN Abe					
			Perso386		LI Jing	LI	Jing					
			Perso405		LIMITED	LIM	MITED					
			Perso409		LIMITED Release Testi	ing LIN	MITED Release Testi	ng				
			Perso459		LIMITED Release	LIM	MITED Release					
			Perso510		LEE Jason	LE	E Jason				Disabled	
			Darco066		ITMITED2015 release	1 176	MITED2015 release	1			Disubicu	

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#### **Title and Description Changes When You Replace a Document**

If you upload a document entity with a different file name into the same Document entity, ICM updates the title and description to reflect the new file name.

Document [URN: 22]		Details Ima	ges Related text	Watches	>>
Details				4	
[22] Person JECKEL Tom (Profile).doc	Edit	Attribute	s Diagram		
Person JECKEL Tom (Profile).doc	Browse	Selected	Highlight incomp	olete 🗌 Shov	□ <mark>1</mark> ≡
Hash Value: 29748B364A53908FAD46D1E9375AC18E3432BFF2 Classification:	Template				
Locked: No Versioning enabled: Yes					
Disclosure 🔻					
Relationships Relationship summary History Involvements Phase & LC	DE Versions	_			
Versions	≡				ļ
Version# Date/Time Title Repl	laced File Path				
Pending 01/07/2019 15:49 [22] Person JECKEL Tom (Profile).doc	C:/Users/cr	n			
0000004 30/03/2016 11:09 Person JECKEL Tom (Profile).doc	C:/temp/Pe	<u>      </u>			

#### There's a Legend to Remind You That a Shaded Document Entity Is Old

If you forget what a shaded row signifies:

- 1. Open a document entity.
- 2. Right-click in the **Versions** area > Select **Legend**.

Do	Document [URN: 22]									
Details										
Tom Jeckels details       View         Uploaded from: C:/Users/cnwsh8/Documents/Jade ICM/Exported Docs/[22] Person       Edit         JECKEL Tom (Profile).doc       Edit         Hash Value: 29748B364A53908FAD46D1E9375AC18E3432BFF2       Edit         Classification:       Edit         Locked: No       Versioning enabled: Yes         Open release: No       Limited release: No         Disclosure										
Relation	nships	Relations	nip summary	History	Involvements	Phase & LO	E Versio	ns		
Versions									≡	
Version#	Date/T	ime	Title			Repl	aced File P	ath		
0000004	30/03/	2016 11:09	Person JEC	KEL Tom	(Profile).doc		C:/te	mp/Persor	I JECKE	
0000003	30/03/	2016 10:54	Person JEC	KEL Tom	(Profile).doc		C:/te	mp/Persor	I JECKE	
0000002	30/03/	2016 10:54	Person JEC	KEL Tom	(Profile).doc		Legend	¥	JECKE	
0000001	03/04/	2014 11:15	i Person JEC	KEL Tom	(Profile).doc		Older Ver	sion	JECKE	

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#### **Hide Deleted Entities**

If you have the **Can view deleted records** permission, deleted entities are always visible.

If required, you can hide these:

- 1. Select your username > **Preferences**.
- 2. Select the **Hide deleted records** checkbox.

Preferences		
Save default window state		Reset window size and position to default
Save window size and position		
Save navigator section states		
Save navigator width	$\mathbf{V}$	
Save notes content on log off	$\mathbf{V}$	
Confirm on exit		
Number of recent entities to keep	10	
Creator automatically added to new case	V	
Creator automatically added to new incident report	V	
Creator automatically added to new information report	V	
Creator automatically added to new asset report	$\mathbf{V}$	
Creator automatically added to new equipment report	$\boldsymbol{\nu}$	
Creator automatically added to new property report	$\boldsymbol{\nu}$	
Case contents - most recent first	V	
Automatically refresh case contents		
Alert when assigned as case officer		
Hide source entity template prompt		
Confirm attribute deletion	V	
Show the attribute popup to the left of the attribute list		
Use Spellchecker		Spellchecker is not installed on this computer
Hide deleted records	r	
Override language for initiating Excel		▼

Brief of Evidence

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#### **BRIEF OF EVIDENCE**

#### **Easily Link a Witness to a Statement in a Brief of Evidence**

You can nominate a witness when you link them to the appropriate statement on the **Linking** tab and then have that witness auto-populate into the list on the **Witness** tab.

This means if you forget to add a witness and you try to link them to a statement, you don't have to stop what you're doing and go to the **Witness** tab to add them.

Prosecution [URN: 1]	
Linking	
Linking is based on statements/affidavits	Please choose the following to link to the selected statement/affidavit
Statements/Affidavits ≡	
Brief Title	Witness BARR, Robert James New Witness
Arrest and Interview of Mark HARRISON (aka F	Elements of proof
GCN/203 Documentation Case Note XXX	
Enquiries Conducted at ABC Electronics Welling	Element Unique Ref # Brief Title
Interview script	Act occurred within a year and a day of victims de
Interview scripts from Waitangi Day	Act was intentional
	Act was unlawful

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Brief of Evidence

### Validate a Brief of Evidence You Created

If you created a Brief of Evidence, you can validate that it's complete and that all the required components and associations are in place.

itle	Brief of Evidence	Validation			
					v Hist
status	The following validation of	conditions were not satisfied	Component Type Filter	=	
	Component Type	Component	Condition	<b>^</b>	
rimary Informant	Defendant	HARRISON, Mark Gregory	Has no Address	- 11	
econdary Inform	Defendant	BROWN, Harold 123	Has no Address	- 11	
	Witness	ANDREWS, Sarah Ellen	Is not associated with any Statements/Affidavits	- 11	
	Witness	BLANCO, Benny	Has no Home Phone	- 11	
	Witness	BLANCO, Benny	Is not associated with any Statements/Affidavits	- 11	
ast Generated by	Witness	BROWN, Harold 123	Has no Home Phone	- 11	
efendants	Witness	BROWN, Harold 123	Is not associated with any Statements/Affidavits	- 11	
	Witness	DOE, Rhys	Has no Home Phone	- 11	
	Witness	DOE, Rhys	Is not associated with any Statements/Affidavits		
	Witness	HARRISON, Grant	Has no Home Phone		
ffences / Charge	Witness	HARRISON, Grant	Is not associated with any Statements/Affidavits		
escription	Witness	LEE, Dan	Has no Home Address		
omicide - Peter F	Witness	LEE, Dan	Has no Home Phone		
lanslaughter - Pe	Witness	LEE, Dan	Is not associated with any Statements/Affidavits		
lealigent Homicid	Witness	MASON, Robert	Has no Home Address		
BC	Witness	MASON, Robert	Has no Home Phone		
	Witness	MASON, Robert	Is not associated with any Statements/Affidavits		
	Witness	SUTHERLAND, John	Has no Home Address		
	Witness	SUTHERLAND, John	Has no Home Phone		
	Witness	SUTHERLAND, John	Is not associated with any Statements/Affidavits		
	Witness	TRAVERS, Jack	Has no Home Address		
	Witness	TRAVERS, Jack	Has no Home Phone		
	Witness	TBAVERS, Jack	Is not associated with any Statements/Affidavits		
	Witness	GARDINER, Hamish	Has no Home Phone		
	Witness	ANDERSON, Steve	Has no Home Phone		
	Witness	ZHANG, Carol	Has no Home Phone		
	Element of Proof	The body was Human	Is not associated with any Statements/Affidavits		
	Element of Proof	Defendent aware of unjustifiable risk which led to death	Is not associated with any Statements/Affidavits		
	Element of Froor		is not according a with any otatements, rendering	-	

# **Select Witnesses from Users with Access to the Case**

When you select witnesses for a brief of evidence, you can now also select from:

- Primary or secondary informants
- Other ICM users who have access to the case

Tasks

#### TASKS

#### **Publish Results for Tasks You Created**

If you created a task, you can publish its results, regardless of who received the task.

This is handy if a task can't be progressed because a result hasn't been published.

It's also useful if someone assigned to a task isn't available for a long time, or has left your agency. It means the person who created the task can publish the task result so the task can be completed.

The **Publish** button is now enabled for Task Results that belong to any task you've created.

#### Search for a Task by Its Historical Status

When you're trying to find a task you can search by its historical status:

- Select Search > Select Tasks or Task Results > Select the type of task or task result you want to search for.
- 2. Expand the Additional criteria area.
- 3. Select the status in the Status or Result Status drop-down.
- 4. Select the **Match if task** checkbox if the task previously had this status.

<b>Q</b> Task	Result Search Standard Attributes A	dvanced T	hesaurus	Scope	Active Search	Stored Search
Standard o	criteria					
Search word	ds pin					Search
Entity URN			Use	Keyword	<ul> <li>Any wo</li> </ul>	rd Clear
Additional	criteria 🔺					
Designation	▼					
Team	▼					i
User	▼					
Туре						
Result Statu	us Complete 🔄 Match if task result previously had this status					
Results (3	3) No Access Results (0)	Ξ	Additio	nal detai	I	
▲ URN St	tatus Title	Case				
6 Co	omplete Interim: PIN Register Request Form Dispatched - 4103492232	[2] Homicid	e			
7 Co	omplete Final - Resolved: PIN Register Received - 4103492232	[2] Homicid	e			
11 Co	omplete Final - Resolved: Obtain PIN Register for 4103494567	None Acces	s			

Tasks

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#### **Task Administrators Can Delete Tasks**

You can delete a task before it's sent, or if it has been cancelled.

This applies if you:

- Created the task
- Are the originating case officer
- Have the Task Administrator permission

#### Make the Task Recipient Information Only by Default

If you have lots of tasks that are for information purposes only, you can set tasks to have this status by default:

- 1. Select Admin > Entity Definition > Types.
- 2. Open the type of task you want to edit in the **Selected** area.
- 3. Select the **Options** tab.
- 4. Under *Recipient type default*, select **Information only**.

General Task Entity Type	Details	Icons	Entity types	Relationships	Usages	Options	Retention criteria	>>
Options Default classification Restricted 💌								
Display warning when another user is updating     Hide no access results on searches     Exclude from duplic	cate identi	fication	Requires A	uthorisation 🗌 (	Check acce	ess at run ti	ne	
Default 'Can forward' to true when adding recipient     Defau Review default	lt 'Can rej	ject' to tr	ue when adding	recipient				
No review required     O Review required     Recipient type default								
O Information only O Action								

Reports

#### **R**EPORTS

#### Header and Group Attributes Aren't Included When You Export Data for an Entity

Depending on how you've set up your entity attributes, you might want to include headers in data you export. This is useful if you need context for subsequent attribute columns.

To apply this setting, select the **Include Header/Group columns** checkbox.

Export	Search Results For P	erson			
Details Export file					
File name	C:\Users\cnwsh8\Documer	ts\Jade ICM\Exported	Docs\steve2.xlsx		
Format	O Tab separated (TSV)	O Comma separa	ted (CSV) OE	(cel (xlsx)	
Encoding	O Unicode O UTF-8	(UTF-8 works better	when file is opened	with Excel directly from Windows Fil	le Explorer)
Line Format	⊙ Multi line (old) O Sing	le line			
Attributes Se	election				
Select all	Include history OPartia	al O Full 🗌 Ind	clude Comments	Show full column headings	✓ Include Header/Group columns

Reports

#### **Remove a Comment from an Information or Incident Report**

- 1. Open the report.
- 2. Select Maintain.
- 3. Select the comment you want to delete.
- 4. Select **Delete**.

Jufamentian Depart [UDN: 0]				
	Details	Entities (1)	Access	Comments (1)
Comments				
03/07/2019 12:07 - DOCUMENTATION, Tech (JIDOC) :				
📕 Maintain Comments				×
03/07/2019 12:07 - DOCUMENTATION, Tech (JIDOC) T	nis report w	as commission	ed in error	
This report was commissioned in error				
Add	Save	Delete	Close	
	L			

#### **Use Rich Text When Adding a Comment**

When you add a comment to an information or incident report, you can format it with rich text.

Add now commont	
he comments field for Information and Incident Reports	
ow allows rich text formatting	

Reports

#### See an Action Officer on an Information or Incident Report

When you set up your information and incident reports, you can choose to show an Action Officer above the title for the report, and specify whether this field is required.

Tinformation Report Entity	Туре	
Options Default classification	<b>▼</b>	
Display warning when another user is up Hide no access results on searches	odating Exclude from duplicate identification	Check access at run time
<ul> <li>✓ Allow file upload</li> <li>✓ Allow bulk upload</li> <li>✓ Has Action Officer</li> <li>□ Action Officer i</li> </ul>	✓ Allow direct document s mandatory	

To be an Action Officer, you need the new **Can be action officer** permission for each type of Information or Incident report.

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1	o
т	о

rts				
Role M	aintenance			
Roles Perm	nissions			
Description				
Elastic Search I	ndexer			
Exclude Record	Wizard			
Full Access				
Full Search				
Functional Team	n Role			
Description	Director's Role			
Deactivated				
Super Role				
Permissions	Designations Tear	ms Users		
Available				Selected
+ General Per	missions	î	1	
+ Incident rep	oorts			
- Information	reports			
Can cha	nge attribute history (	date/time		
Can add	security access			
Can rem	nove user access			
Can rem	nove team access			
Can cha	nge user preference	(when agency enabled): Creator automatically added to new inforn		
Create i	nformation report fro	m Word/PDF documents		
- General	IR			
Can	create		5	
Can	change			
Can	delete		< .	
Can	search			
Can	change source entity	to entity relationship		
Can	change entity to entity	y relationship		
Can	create source entity t	o entity relationship		
Can	create entity to entity	relationship		
Can	create task	relationship		
Can	replace or remove do	ocument		
Can	be action officer	coment.		
+ CISU RE	eport			
+ Hamish's	s Info Report Type			
<u> </u>		·		

You can add this permission to a role that's assigned to the user, or a team they're in. This is under **Admin** > **Security** > **Roles**.

informat	on Report [URN:]	Entities
Details		
Action Officer		
Title		
Description		

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#### **Link Incident and Information Reports**

Your organisation might have information coming in from different sources. A way to connect related information and incident reports is to link them:

- 1. Open an information or incident report.
- 2. Select the Overflow >> tab > Select **Referenced IRs**.
- 3. Drag a report from your favourites in the Navigator > Drop it in the **Referenced IRs** area.

Information	Report [	URN: 8]	Details	Entities (1)	Access	Comments (1)	Tasks (1)	Threads (*)	History
Referenced IRs									
			_						
Entity type	URN	Title	Cre	ated By	T   (310.0	Creat	ed Date	Action O	Ifficer
nformation Report	10	Registration Details of Car	Searc	h to add		DC) 09/07	/2019 13:42		
			<u>G</u> o to :	IR					
			Edit R	eason					
			<u>R</u> emov	ve Relationship					
			<u>R</u> einst		)				
			Show	Legend					

#### **Remove a Document from an Information or Incident Report**

If you accidentally load a document into an information or incident report, you can remove it.

Draft				
Document	View	Edit	Download	Remove Allow edit
Replacement Classification	Create	Browse •		
When Actioned	24/08/2009		₿ 10:36	<b>\$</b> \$

You need the Can replace or remove document permission to access this feature.

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Reports

Roles Permissio	ns				
Description					
lastic Search Index	er				
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<ul> <li>Information report</li> </ul>	orts				
Can change a	attribute his	tory date	/time		
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Can remove	user access				
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Admin

#### **ADMIN**

#### **Choose the Background Colour for Your Logo**

- 1. Select Admin > System > Settings.
- 2. Select the **Agency** tab.
- 3. Select the **Change back colour** checkbox.
- 4. Select the colour you want as the background for your logo.
- 5. Select the colour you want > Select **OK**.
- 6. Select Save.



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#### Admin

#### **Checking Your Word Template Has the Required Bookmarks**

When you import a Microsoft Word template, ICM checks whether the template contains the bookmarks you need for the report.

If any bookmarks are missing, ICM will tell you which ones you need to add.

It won't save a template that doesn't have the bookmarks you need.

#### **Quickly Find Entity Types**

When you set up entity types you can use the quick filter to find the type of entity you're looking for.

Use either of these methods to access this feature:

- Press **Ctrl**+**F** or right-click in the *Available* or *Selected* area.
- Select Quick Filter.



Admin

### Easily Add a New Value for a Code Table

If you need to add a new value for a code table, use the Add 📑 icon to do this.

Entity	Attributes						
Select and e	nter details below Case File						
- Case File Case S	Status	Attribute select	ed Case Priori	ty			>
∯ Ca Case ( - Risk A Lik	ase Priority Closure Issessment (Community Impact) Kelihood	Select Codes Available High Low Routine	Dependencies At CMIEntityAt Attribute selected	tribute Text tributeNewCode Case Priority	Form		[] ≡
Activit	y Type	Code table	New code Save & New	Save & Close	Close	phabetical	O Custom
Description	Case Priority		ect Codes Create	Code Table		Apply	Cancel

#### **Specify the PO Box for a Location**

This option is available when you open a Location entity.

Location	[URN: 6]		 Details Ir	nages	Related text	Watches	Google map	>>
Details							4	• •
Building name		PO Box		At	tributes Diagra	m		
Number	45 Unit number			Sele	cted 🗌 Highlig	ght incomple	te 🗌 Show His	s Ш ⁻ ≡
Street	West Street							
Suburb	Ocean City							
City	Maryland							
Postcode	21842							
Country	United States 👻							
State	Maryland 👻		 					

# Get Confirmation That You've Loaded a Licence

When you load a licence under **Admin** > **System** > **Licence**, you'll get a confirmation message if the licence loads successfully.

#### **Set up Multiple Code Table Attributes**

You can set the available list to remain unchanged when you add multiple attribute values that are code tables.

This is useful if you want to repeat an attribute but you want to reuse the same code value.

To set this up:

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- 1. Select Admin > Attributes > Types > Entity Type > Attribute Type.
- 2. Select the **Security Add/Change** tab.

Entity	Attributes					
Select and e	nter details below					
Select Type	Vehicle				-	
Origin						
Paren	t Condition					
Туре						
Warnii	ng					
Category	Attribute Name		-	Move	Sequence	
Description	Туре					
Code table	Vehicle Type		▼ Sel	ect Codes	Create Code Table	
Options C	onditions(*) Security A	dd/Change Secu	urity Delete	Usage (0)		
× COMMENTS	- Allow comments for t	his attribute				
× DEACTIVAT	TED - The attribute type	is deactivated				
× DEFAULT -	Attribute will be created	by default				
VALUE - A	value must be selected	for this attribute				
× FREE	TEXT - The user can e	nter free format te	ext for this at	ttribute		
×u	IRL - The specified value	must be a valid UP	RL			
× CAL	CULATED - A value will I	be calculated by th	ne system			
	E TABLE - The specified	value will be sele	cted from a	code table		
✓ A	llow users to select the s	ame code table va	alue multiple	times if attrib	oute allows multiple sel	lections
× DATI	E - The specified value r	nust be a date				
X MAS	K - The specified value SPTC	will be in masked	format			
	ERIC - The specified value n	nue musi de nume	nc			
X USE	<ul> <li>The specified value in</li> <li>The specified value in</li> </ul>	vill be a selected i	iser			
× TEAI	<ul> <li>4 - The specified value value</li></ul>	will be a selected t	team			

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#### Example of Using Multiple Code Table Attributes

In the following image type is a multiple attribute with code value choices of Aircraft, Boat, Car, Motor Cycle.

You can select aircraft multiple times. It won't be removed from the available list once it has been used.

Available		Selected 🗌 Highlight incomplete 🗌 Show History	
- Vehicle Attribute 1 Attribute with comments Calculated Child Condition 1	> <	<ul> <li><u>■</u> Type</li> <li>Aircraft</li> <li>Colour</li> <li>Black</li> <li>Aircraft</li> <li>Colour</li> <li>× Green</li> </ul>	
Value Aircraft Boat Car Motor Cycle		- Colour	

#### **It's Easier to Manage Attribute Code Tables**

You can use tabs to switch between Code Table Entry and Code Table Type.

#### Select Admin > Code Tables > Attributes > Entities.

Code Table Mair	ntenance	Details Usage Code Table Type
Select and enter details	below	
Code Table Type	Code Table Entry	Deactivated
Vehicle Type	Aircraft	
Vehicle Type	Boat	
Vehicle Type	Car	
Vehicle Type	Motor Cycle	
Code Table Type	e Maintenance	Code Table Type Code Table Entry
Code Table Type Select and enter details	e Maintenance below	Code Table Type Code Table Entry
Code Table Type Select and enter details Description	e Maintenance below	Code Table Type Code Table Entry
Code Table Type Select and enter details Description Disclosure Sensitivity	e Maintenance below	Code Table Type Code Table Entry
Code Table Type Select and enter details Description Disclosure Sensitivity Disclosure Sensitivity Reaso	e Maintenance below	Code Table Type Code Table Entry
Code Table Type Select and enter details Description Disclosure Sensitivity Disclosure Sensitivity Reaso Disclosure Status_OLD	e Maintenance below	Code Table Type Code Table Entry

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### **MORE NEW FEATURES**

#### **Access Reminders from the Home Screen**

Reminders are now available from the home screen.

