Investigations Case Management
- Release Notes

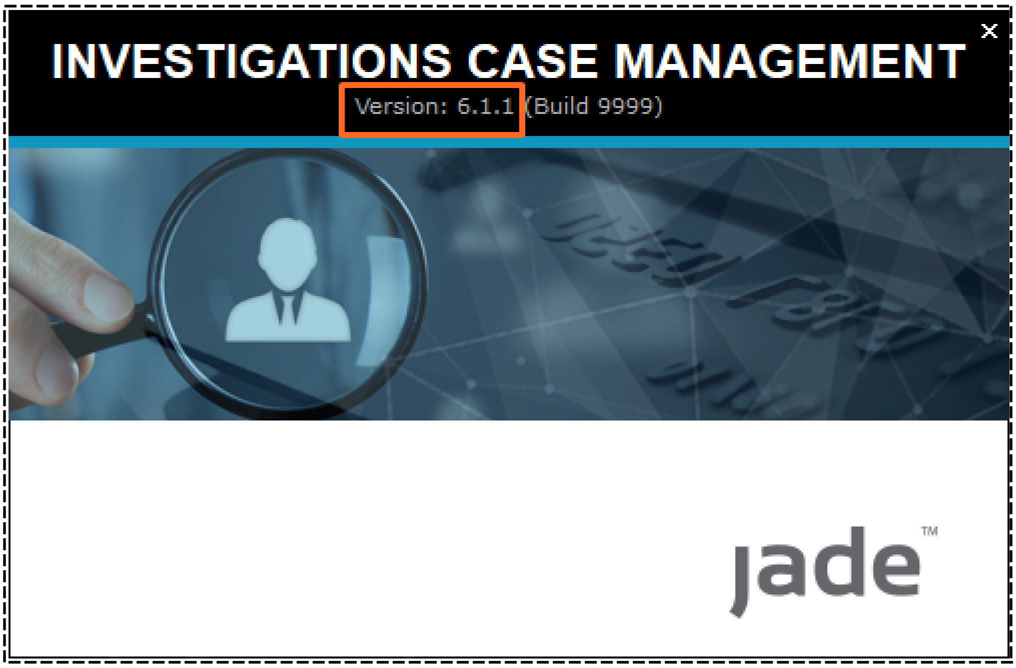
VERSION 6.1.1

jade™

CONTENTS

Overview

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



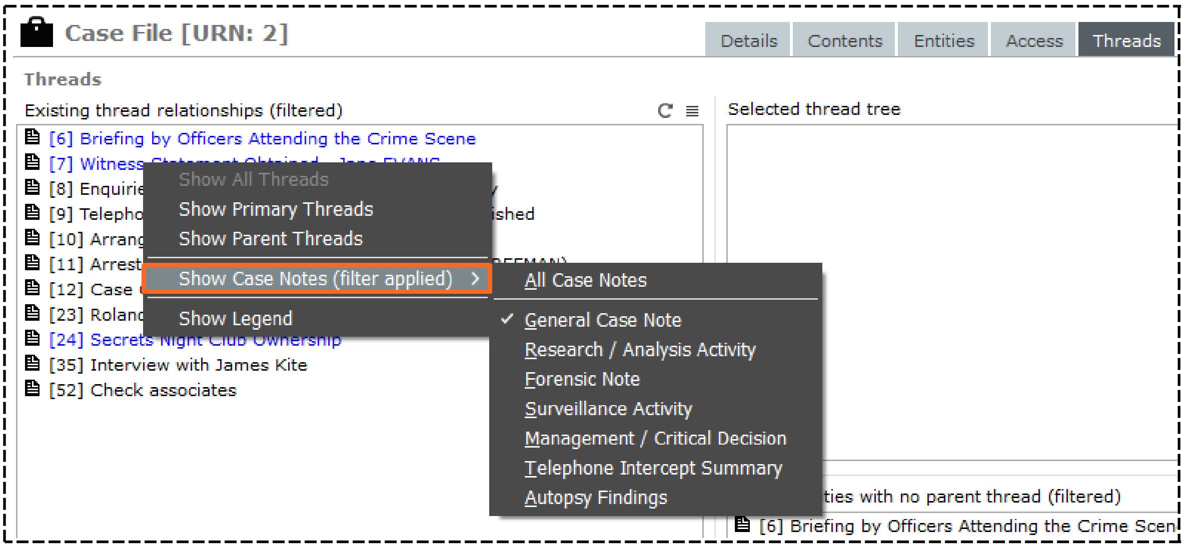
Cases

Threading

See Case Notes for Threaded Relationships in a Case

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

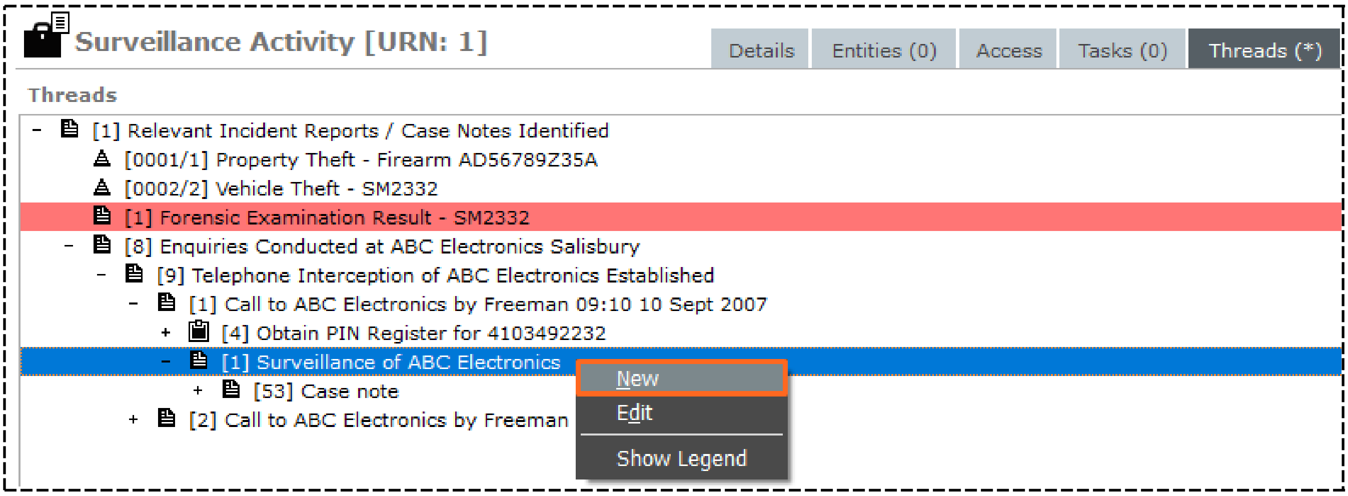
1. Open a case.
2. Select the **Contents** tab > Select the **Threads** subtab.
3. Right-click a thread relationship > Select **Show Case Notes** > Select the type of case note you want to see.



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.

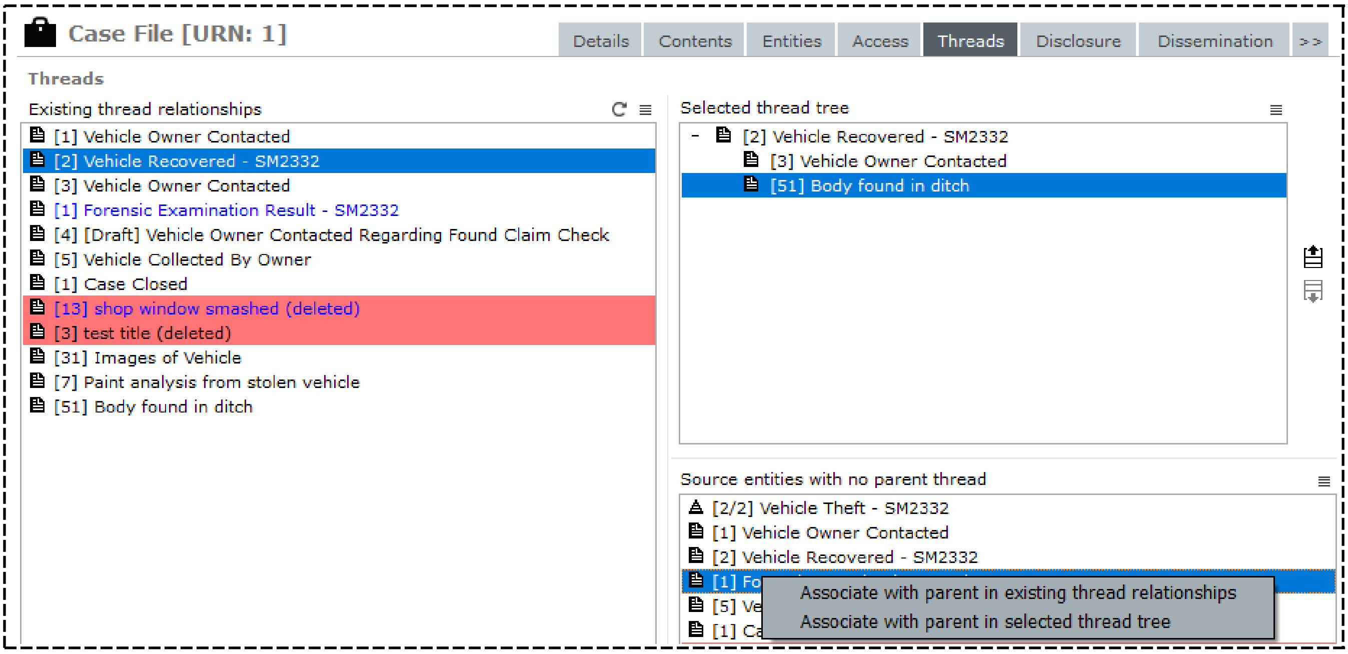
*Previously the new case note would be threaded to the open case note – Surveillance Activity [URN:1] in this example. It will now be threaded to **Surveillance of ABC Electronics**.*



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.



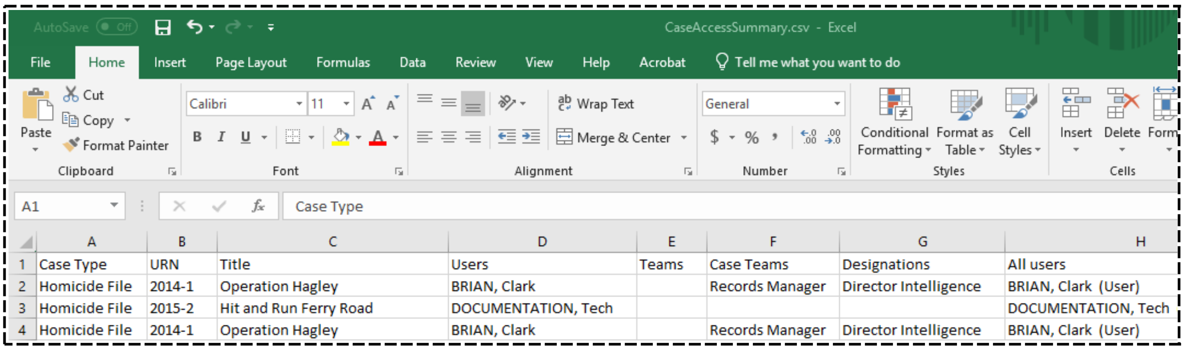
See Which Users Have Access to Cases

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.

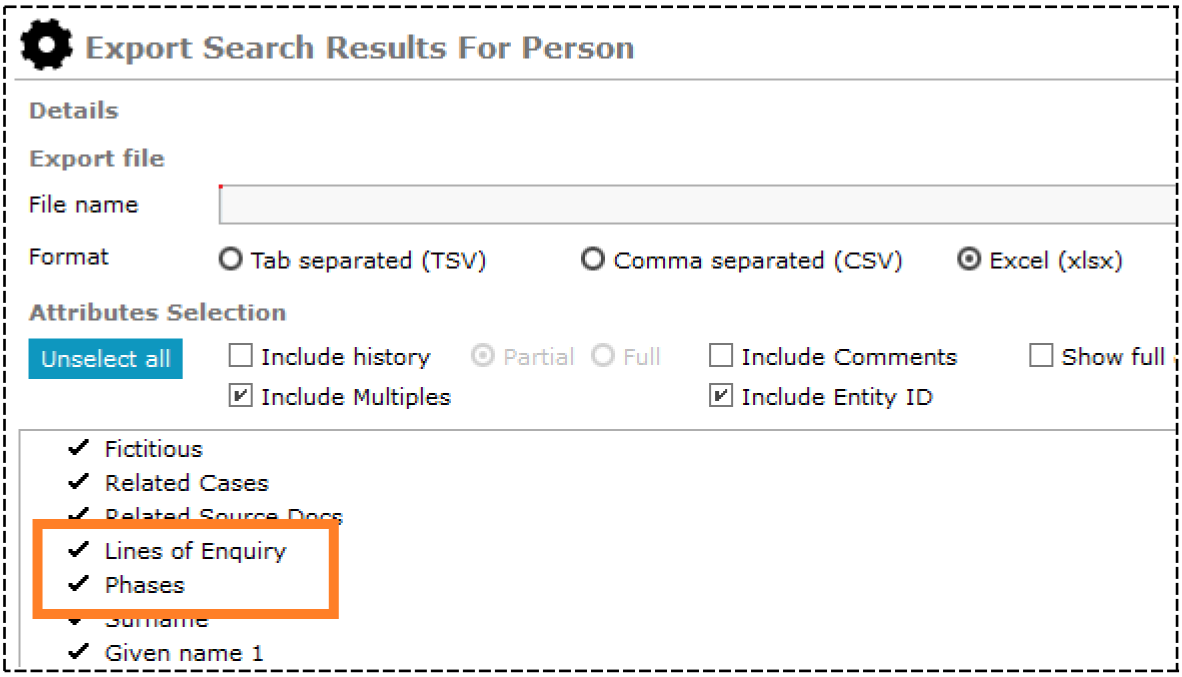
To access this report:

1. Select **Cases** > **Case Access Summary**.
2. Select **Browse** to specify where you want to save the file > Select **Save**.
3. Use the Selection > < arrows to select the information you want to export.
4. Select **Export**.



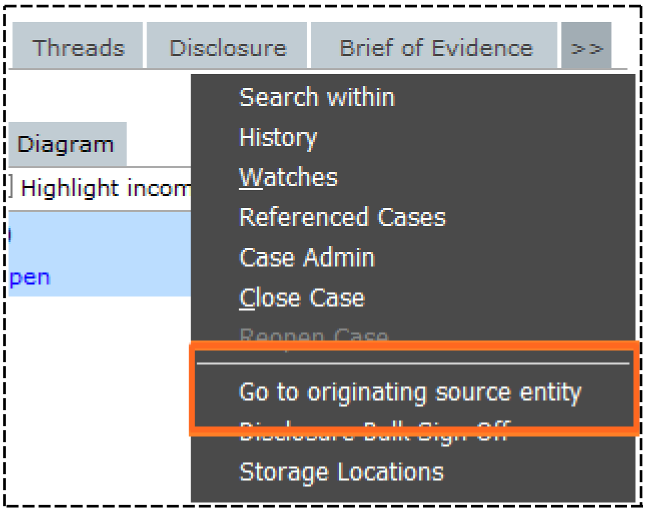
Export Case Phase or LOE from a Case

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.



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.



More Users Can Submit Case Notes for Review

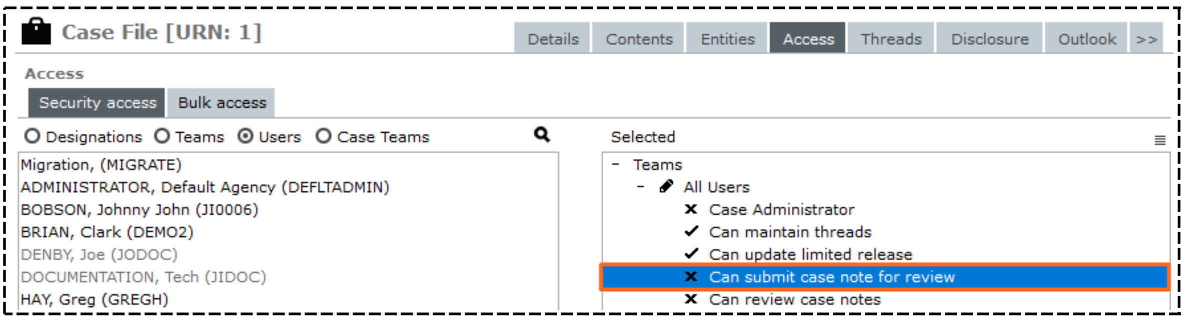
Previously, only the person who created a case note could submit it for review and select someone to review it.

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.



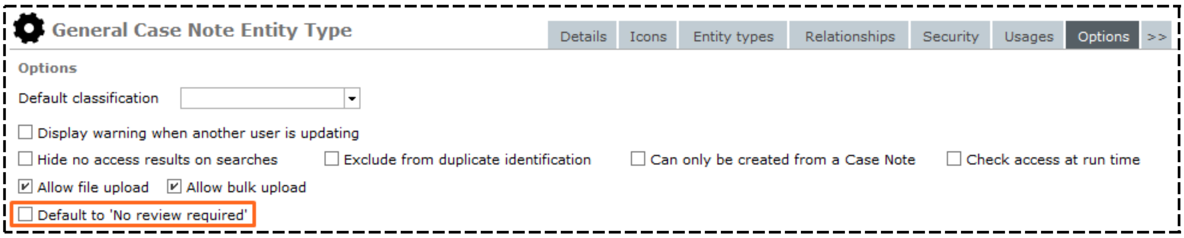
Case Note Review Setting

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.



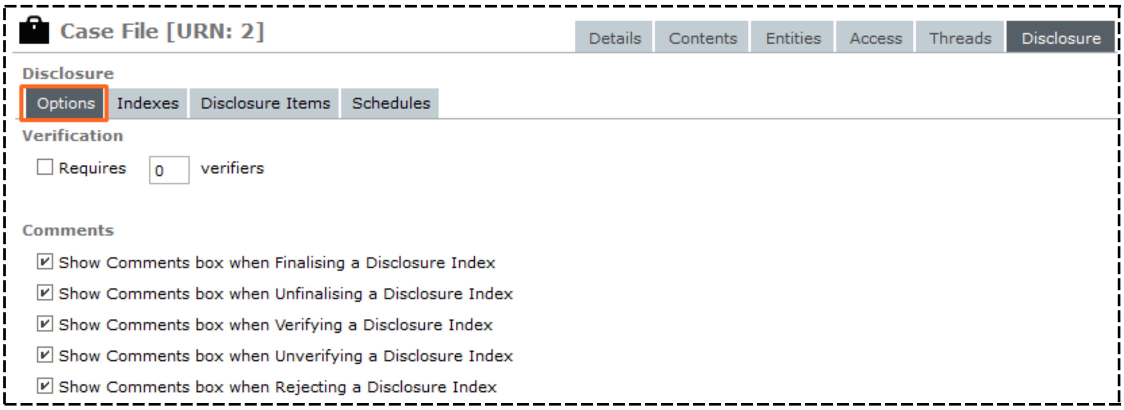
The Disclosure Tab Opens Quicker

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

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

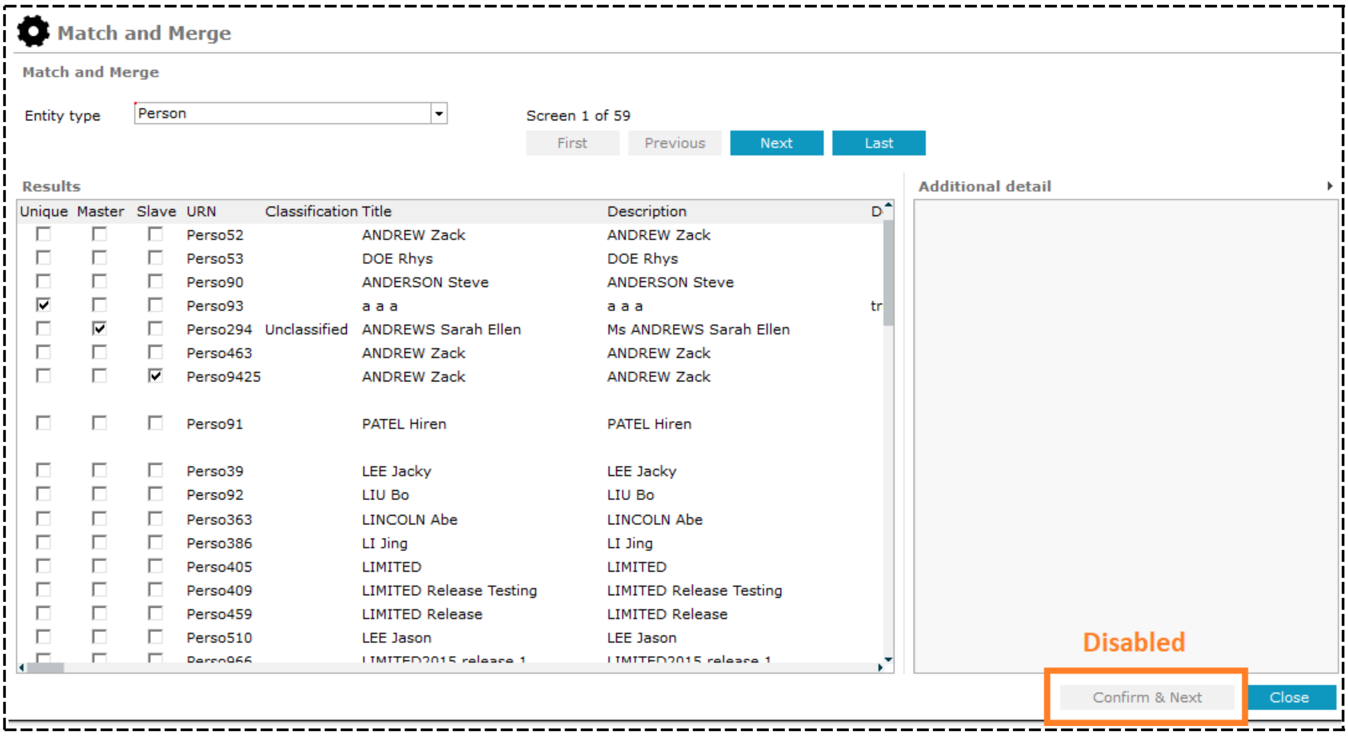


ENTITIES

Entities Won't Automatically Be Merged

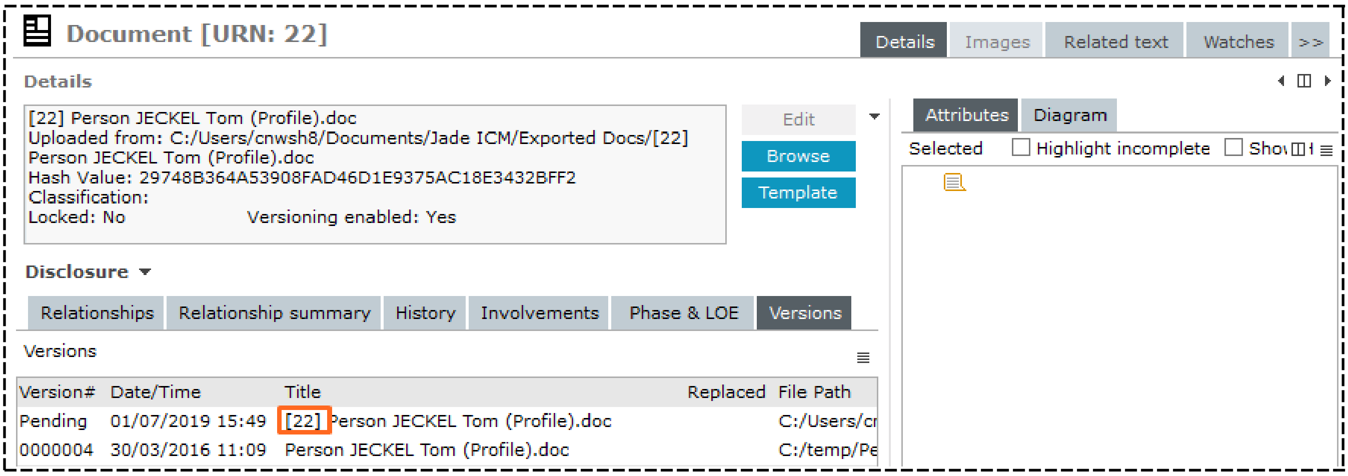
We're improving the entity merging utility. These enhancements will be released as a hotfix to ICM 6.1.1.

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



Title and Description Changes When You Replace a Document

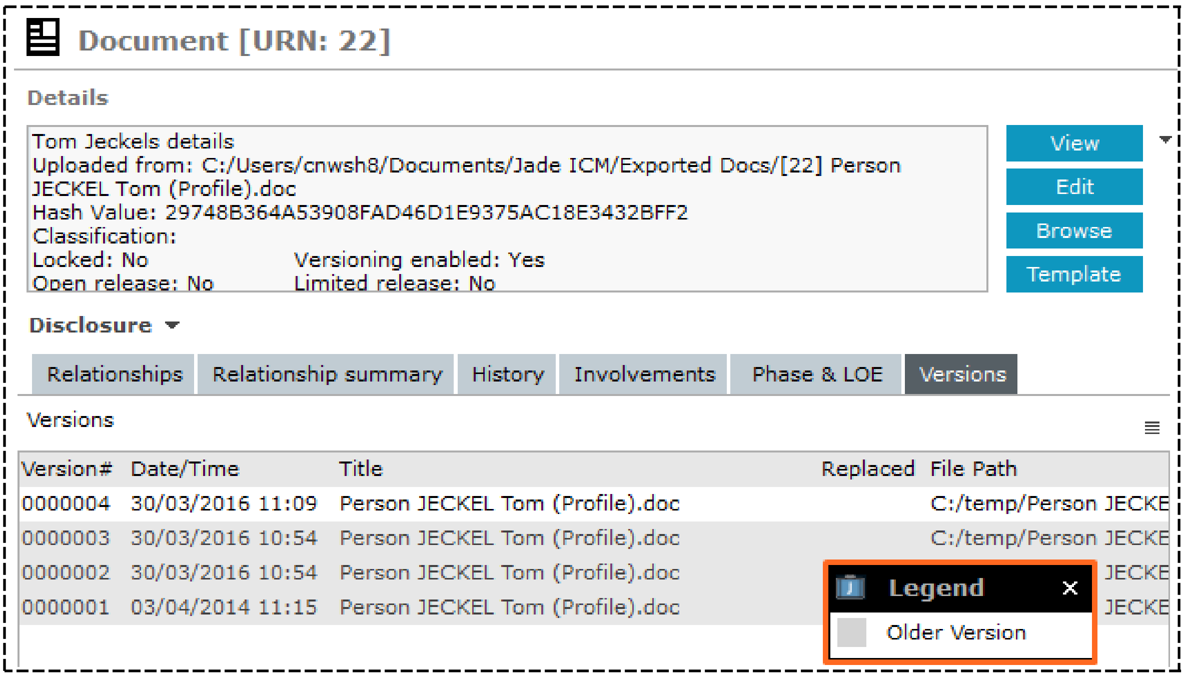
If you upload a document entity with a different file name into the same Document entity, ICM updates the title and description to reflect the new file name.



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**.

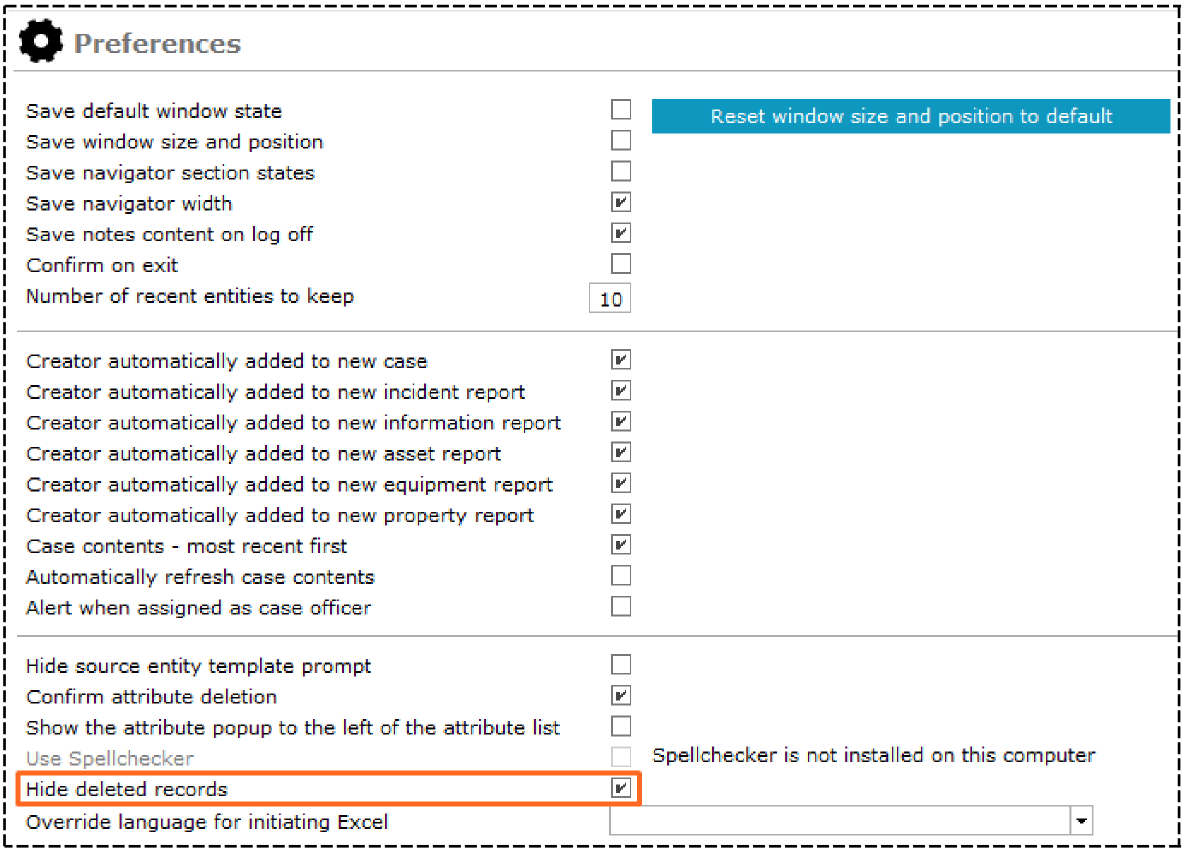


Hide Deleted Entities

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.

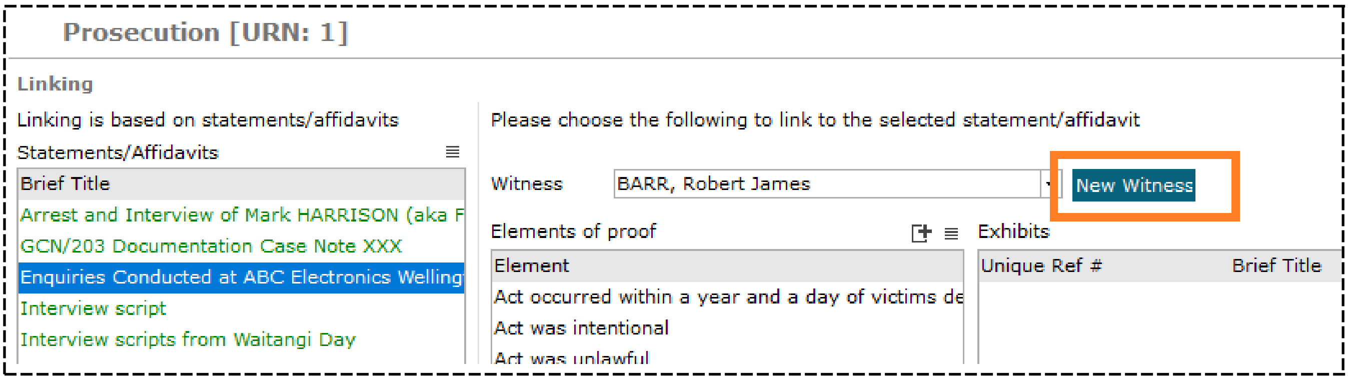


Brief of Evidence

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

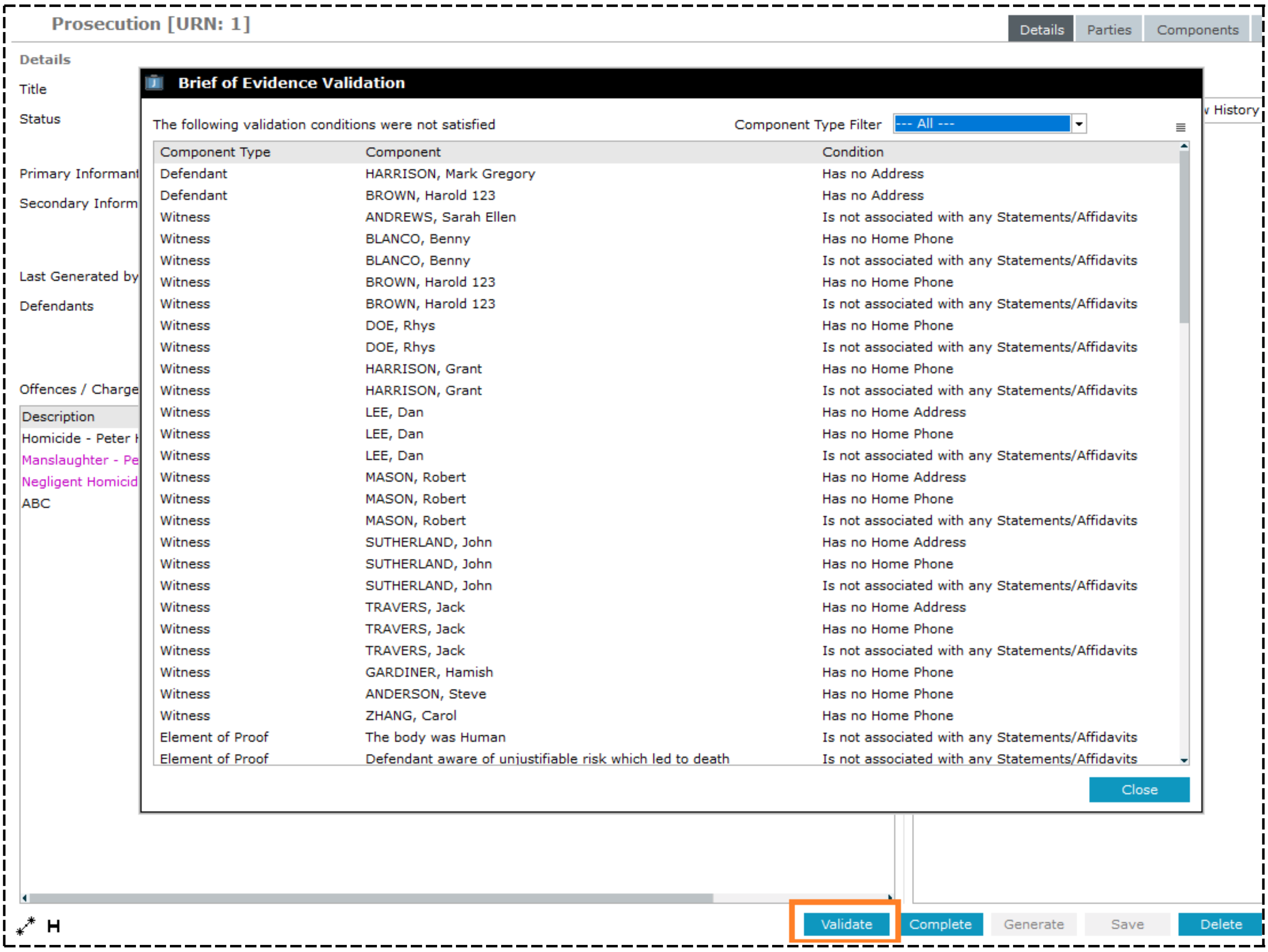
You can nominate a witness when you link them to the appropriate statement on the **Linking** tab and then have that witness auto-populate into the list on the **Witness** tab.

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.



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.



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

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.

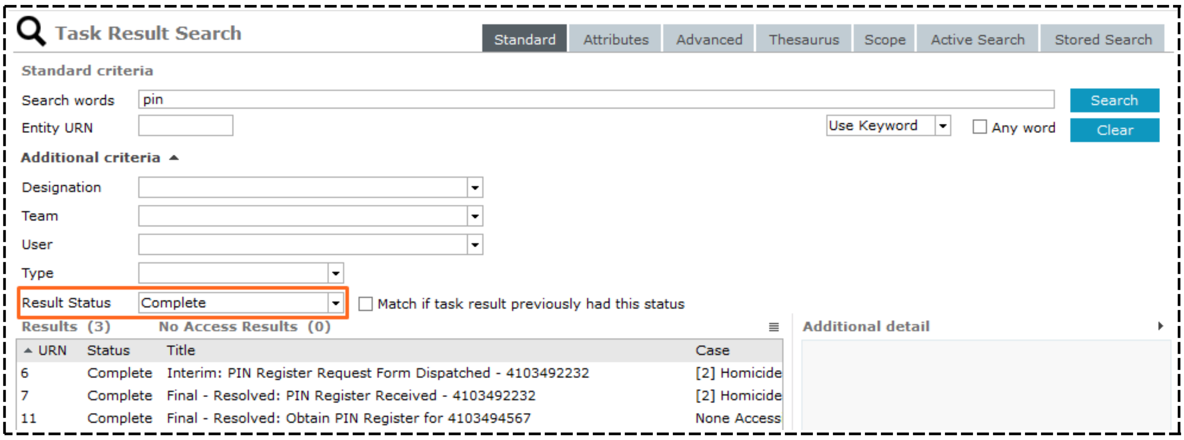
It's also useful if someone assigned to a task isn't available for a long time, or has left your agency. It means the person who created the task can publish the task result so the task can be completed.

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:

1. 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.



Task Administrators Can Delete Tasks

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

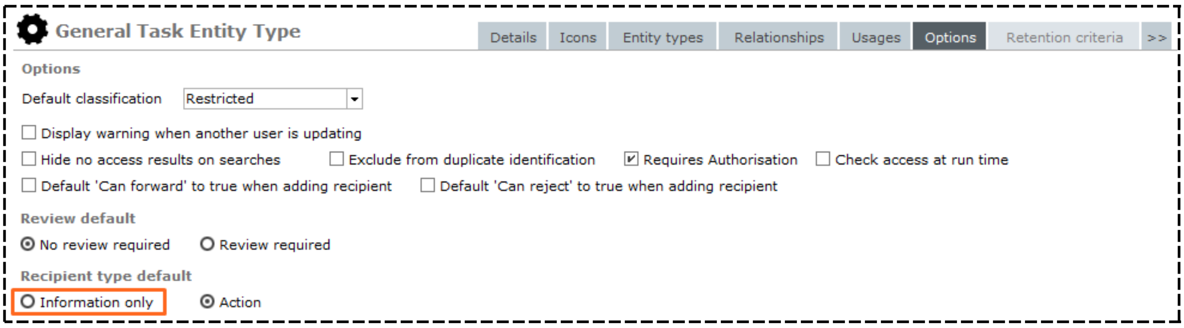
This applies if you:

- 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**.

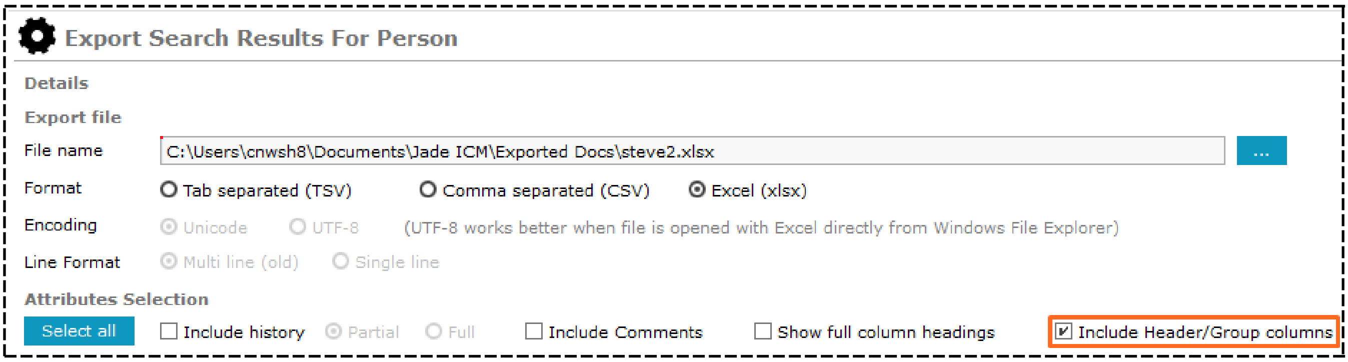


REPORTS

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

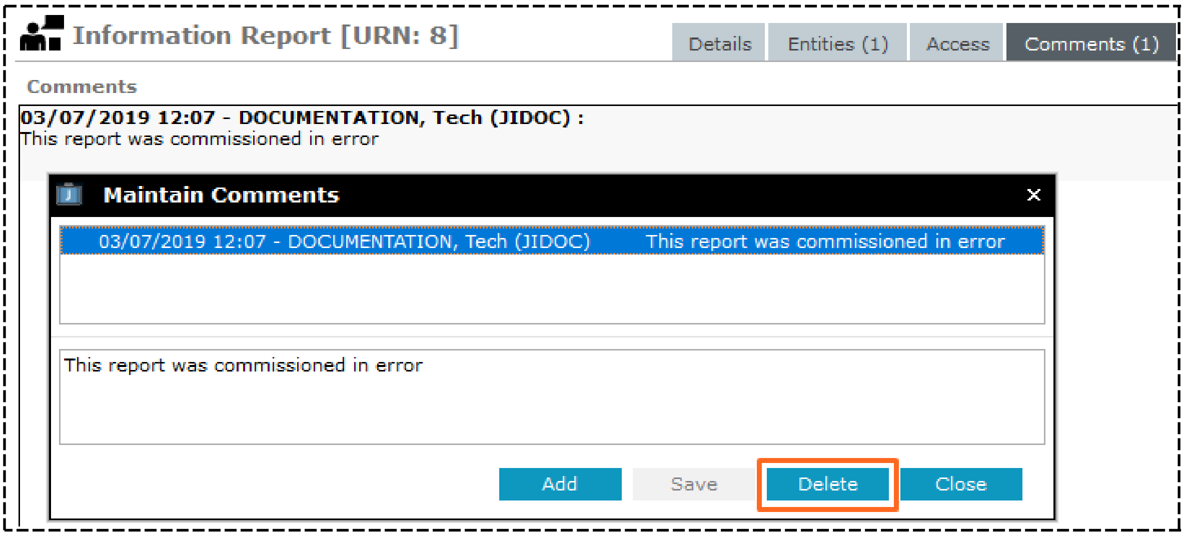
Depending on how you've set up your entity attributes, you might want to include headers in data you export. This is useful if you need context for subsequent attribute columns.

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



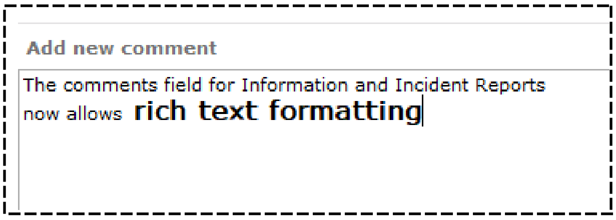
Remove a Comment from an Information or Incident Report

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



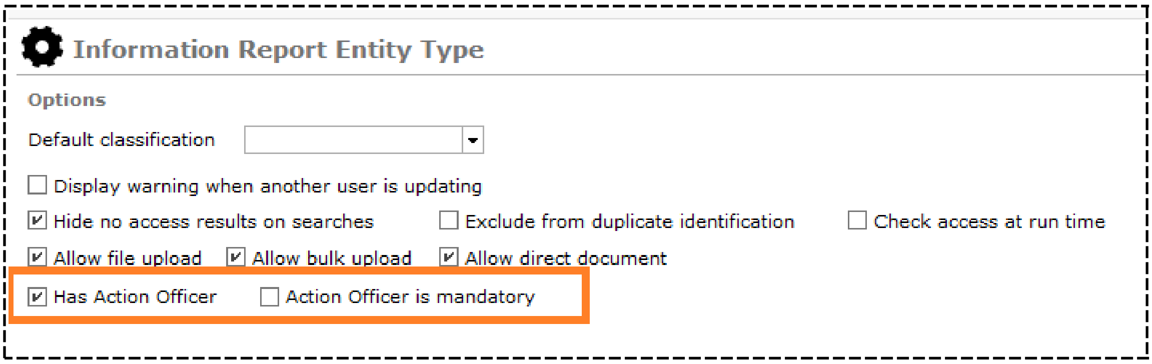
Use Rich Text When Adding a Comment

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

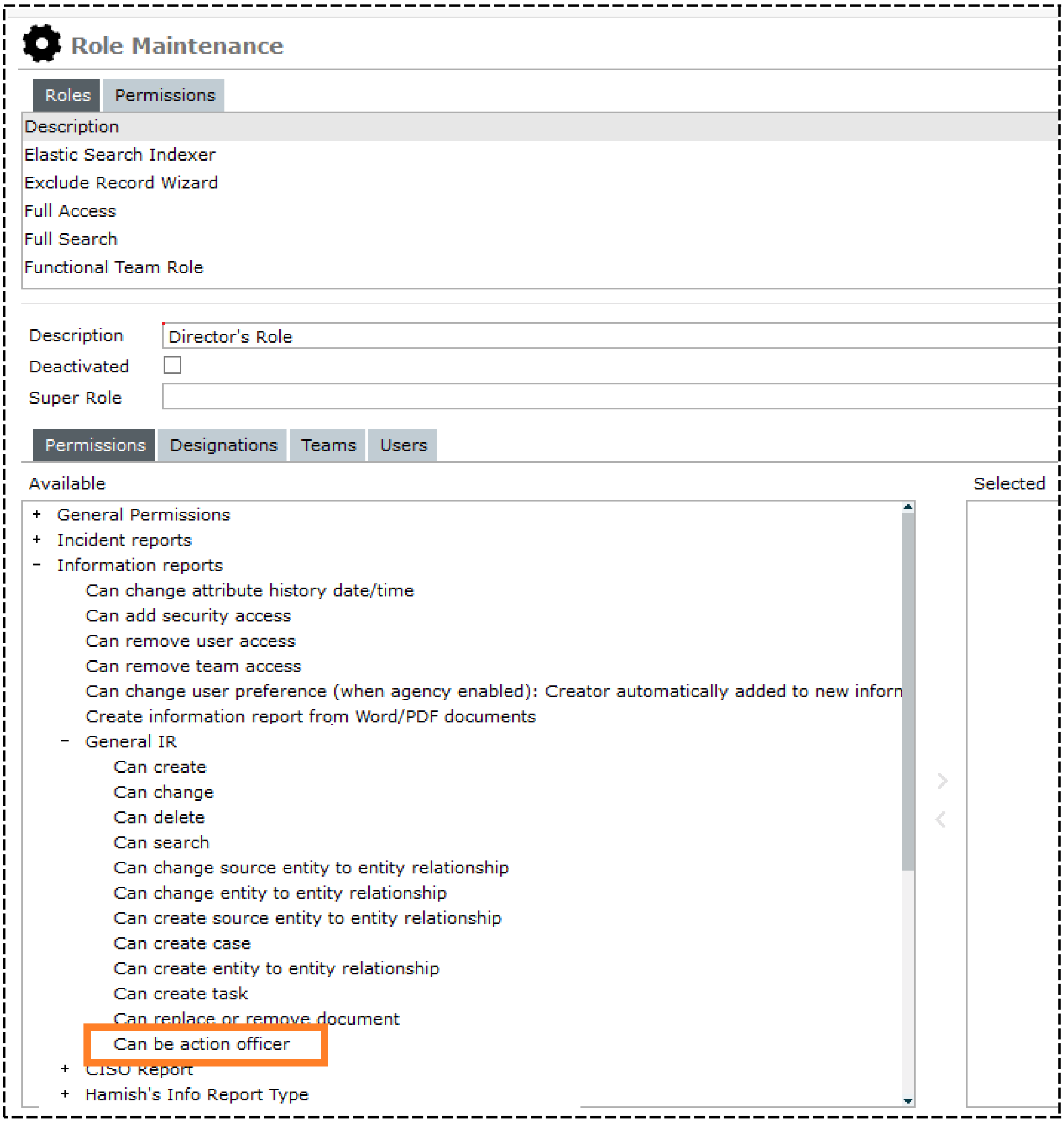


See an Action Officer on an Information or Incident Report

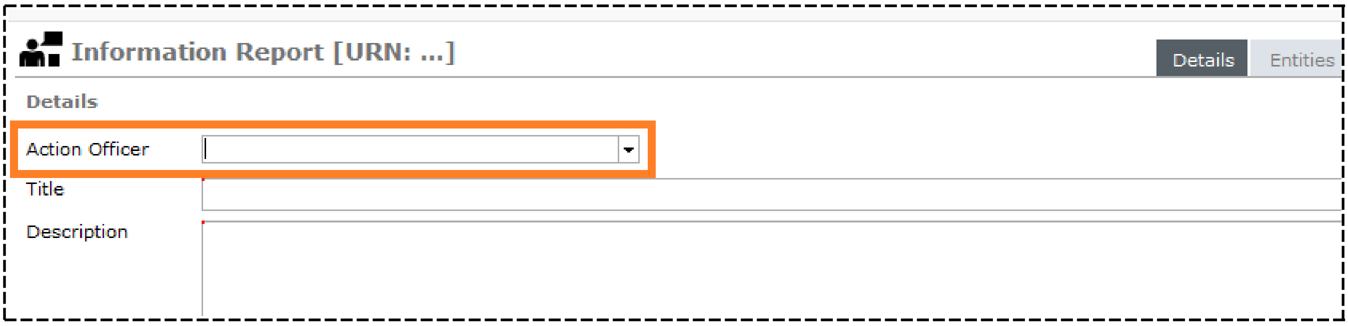
When you set up your information and incident reports, you can choose to show an Action Officer above the title for the report, and specify whether this field is required.



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



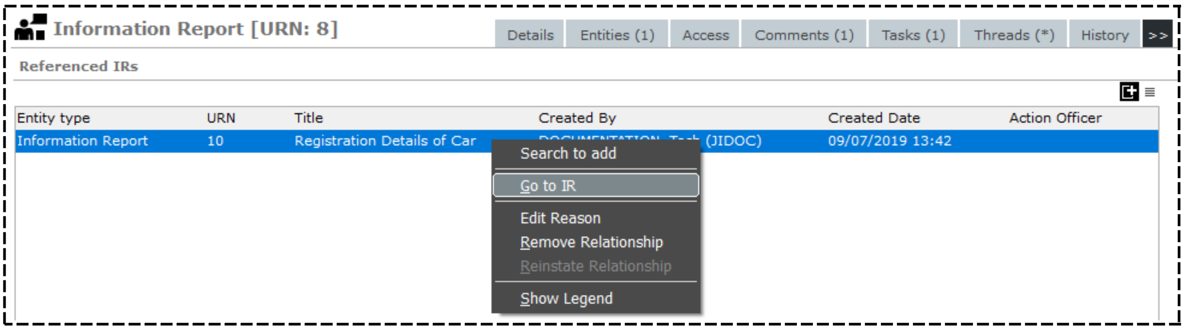
You can add this permission to a role that's assigned to the user, or a team they're in. This is under **Admin** > **Security** > **Roles**.



Link Incident and Information Reports

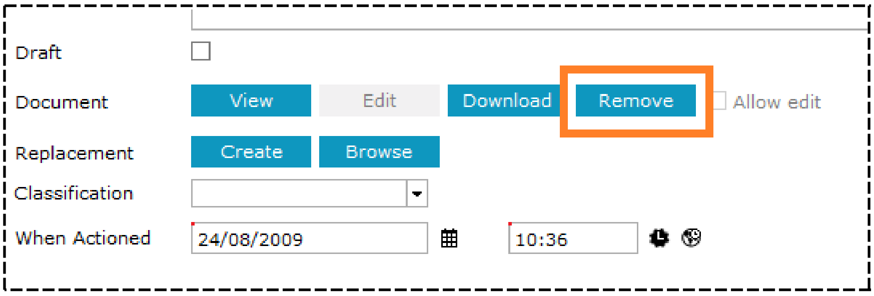
Your organisation might have information coming in from different sources. A way to connect related information and incident reports is to link them:

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.

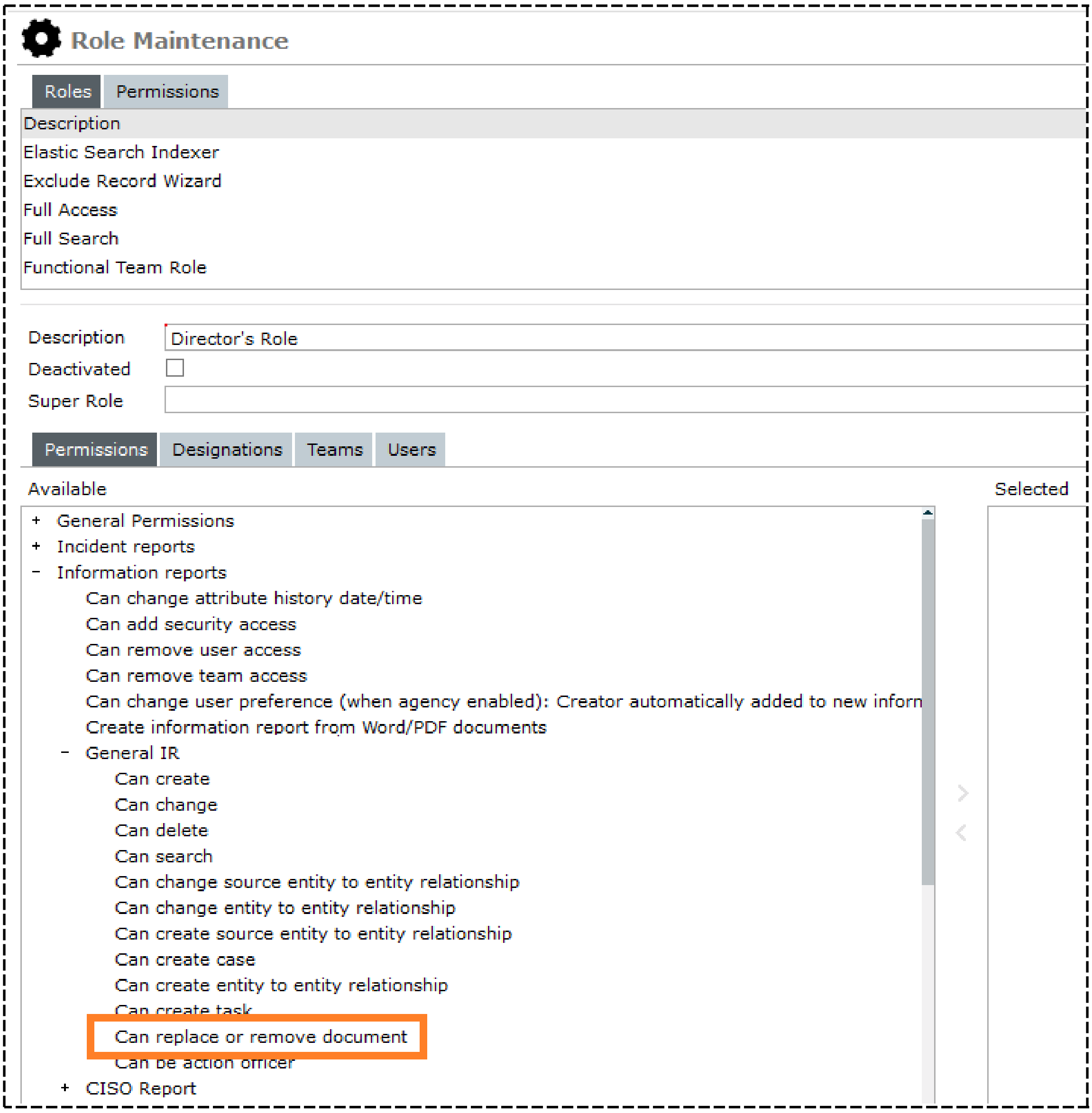


Remove a Document from an Information or Incident Report

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



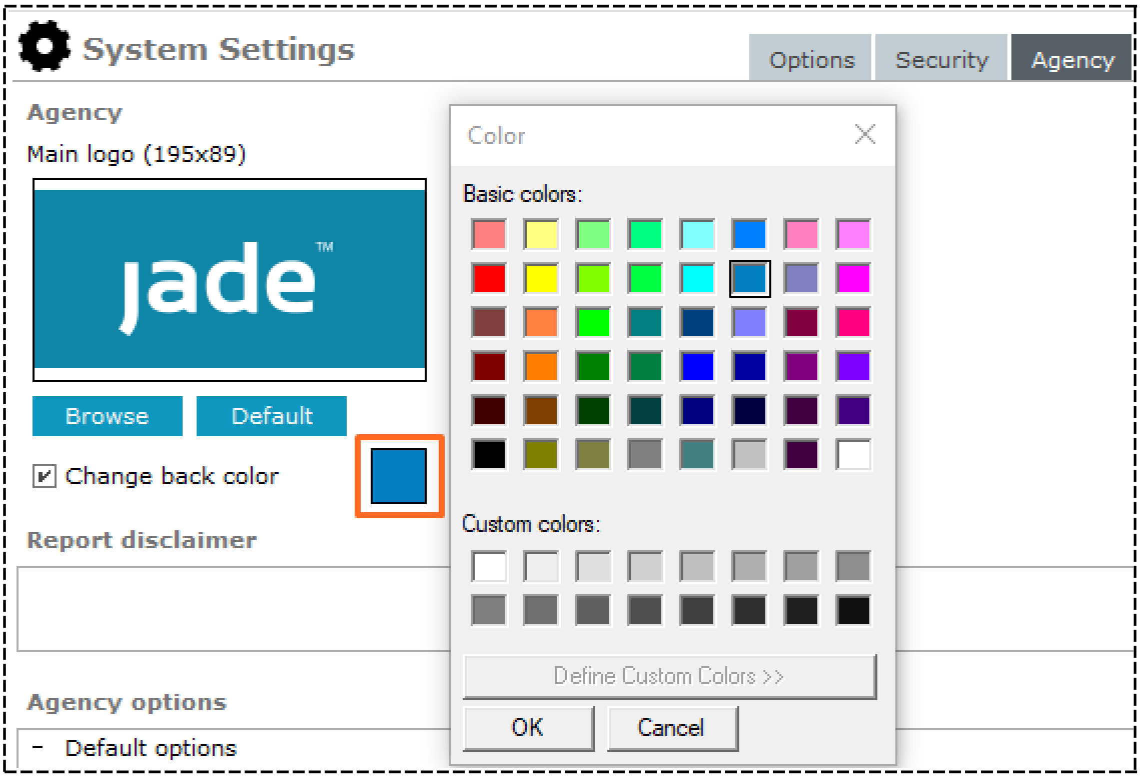
*You need the **Can replace or remove document** permission to access this feature.*


Role Maintenance
Roles
Permissions
Description
Elastic Search Indexer
Exclude Record Wizard
Full Access
Full Search
Functional Team Role
Description
Director's Role
Deactivated
Super Role
Permissions
Designations
Teams
Users
Available
Selected
+ General Permissions
+ Incident reports
- Information reports
Can change attribute history date/time
Can add security access
Can remove user access
Can remove team access
Can change user preference (when agency enabled): Creator automatically added to new inforn
Create information report from Word/PDF documents
- General IR
Can create
Can change
Can delete
Can search
Can change source entity to entity relationship
Can change entity to entity relationship
Can create source entity to entity relationship
Can create case
Can create entity to entity relationship
Can create task
Can replace or remove document
Can be action officer
+ CISO Report

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**.



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.

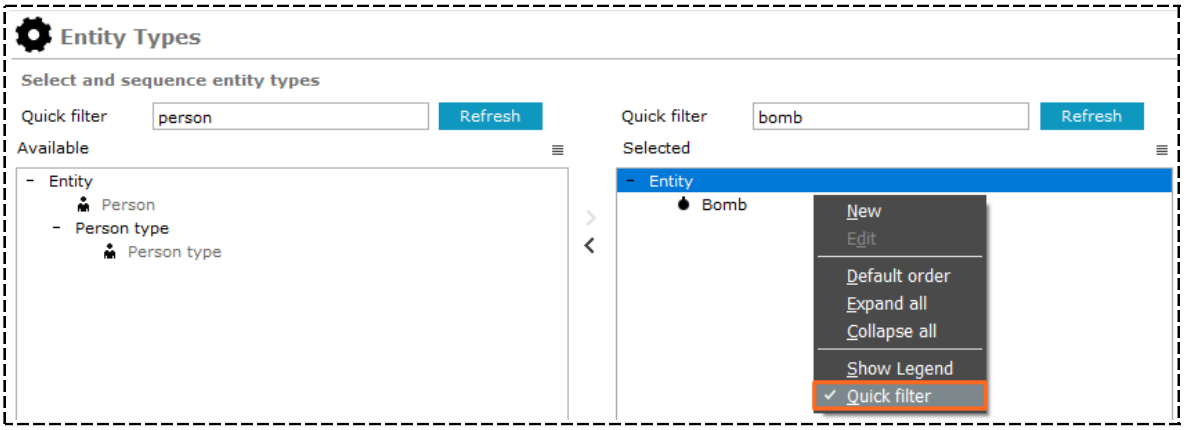
It won't save a template that doesn't have the bookmarks you need.

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.

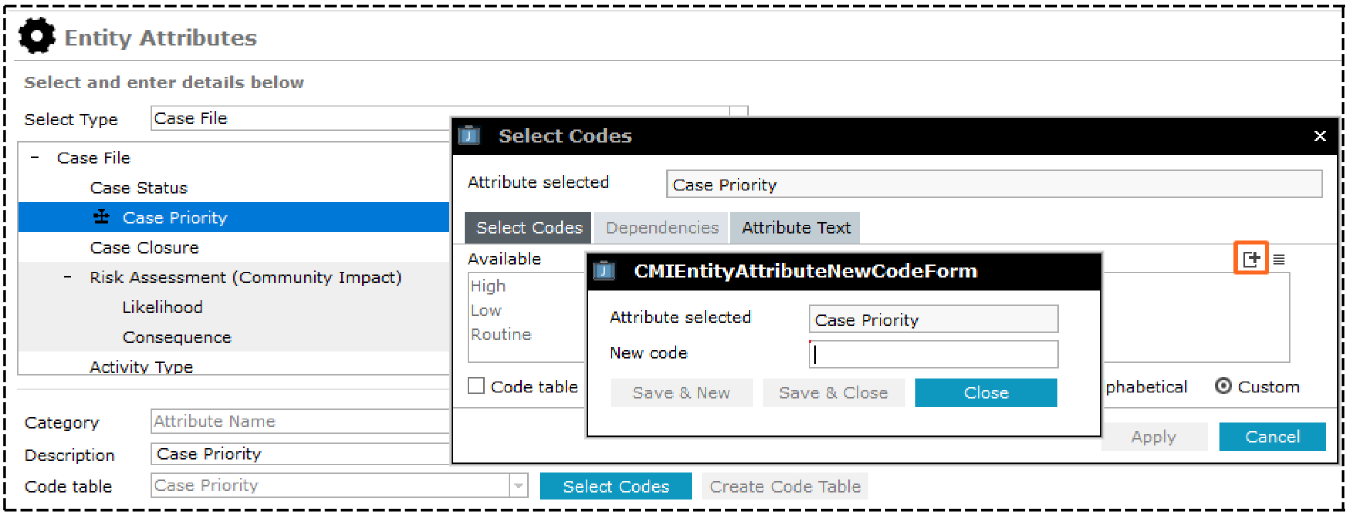
Use either of these methods to access this feature:

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



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.



Specify the PO Box for a Location

This option is available when you open a Location entity.

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.

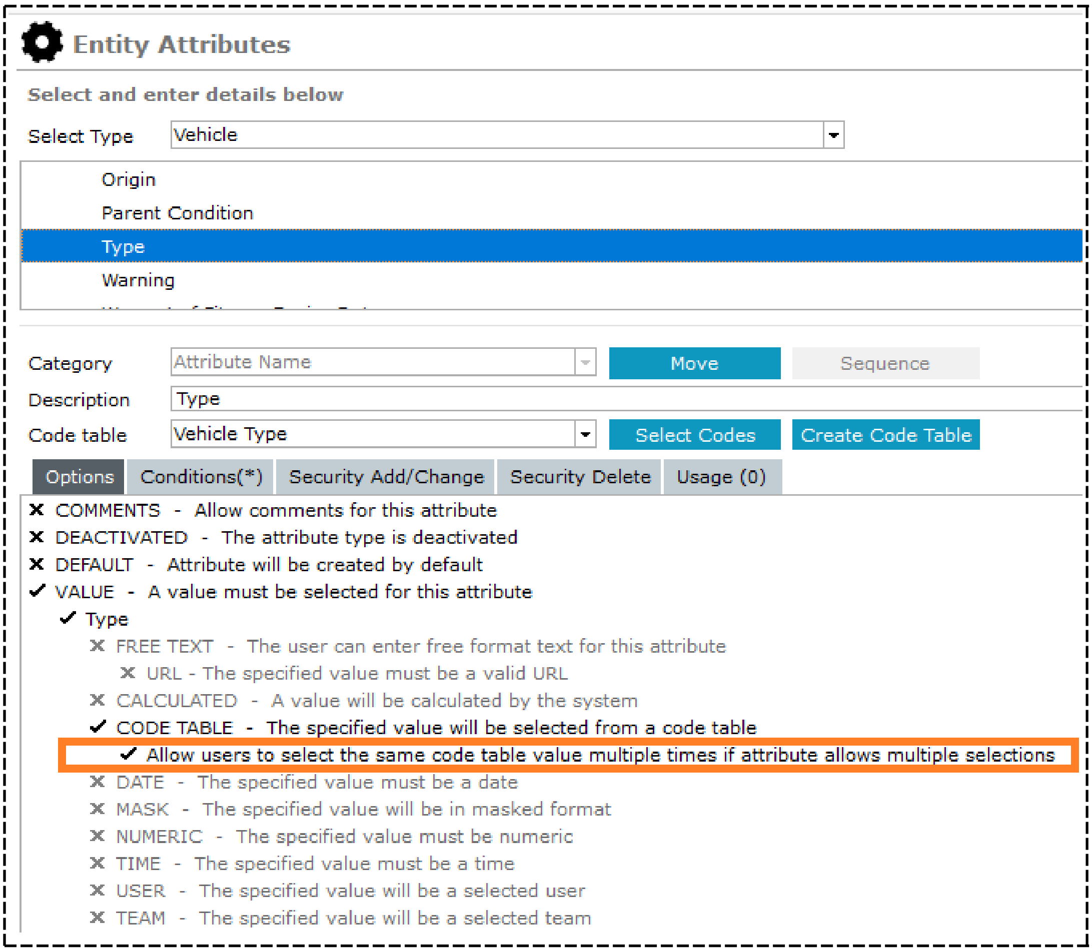
Set up Multiple Code Table Attributes

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:

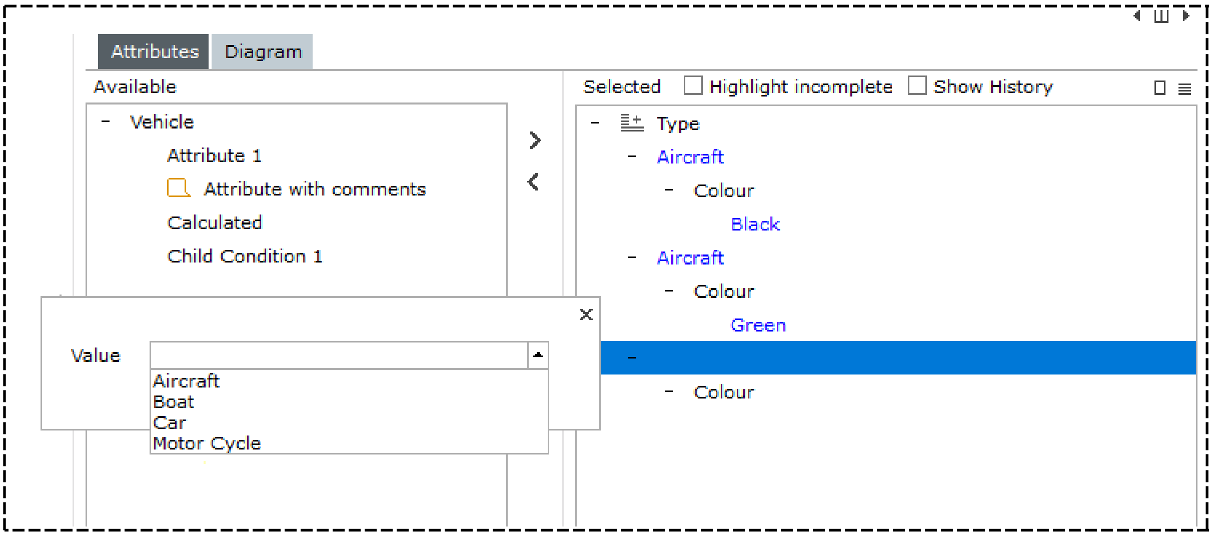
1. Select **Admin** > **Attributes** > **Types** > **Entity Type** > **Attribute Type**.
2. Select the **Security Add/Change** tab.



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.



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**.

More New Features

Access Reminders from the Home Screen

Reminders are now available from the home screen.