

# eCASE

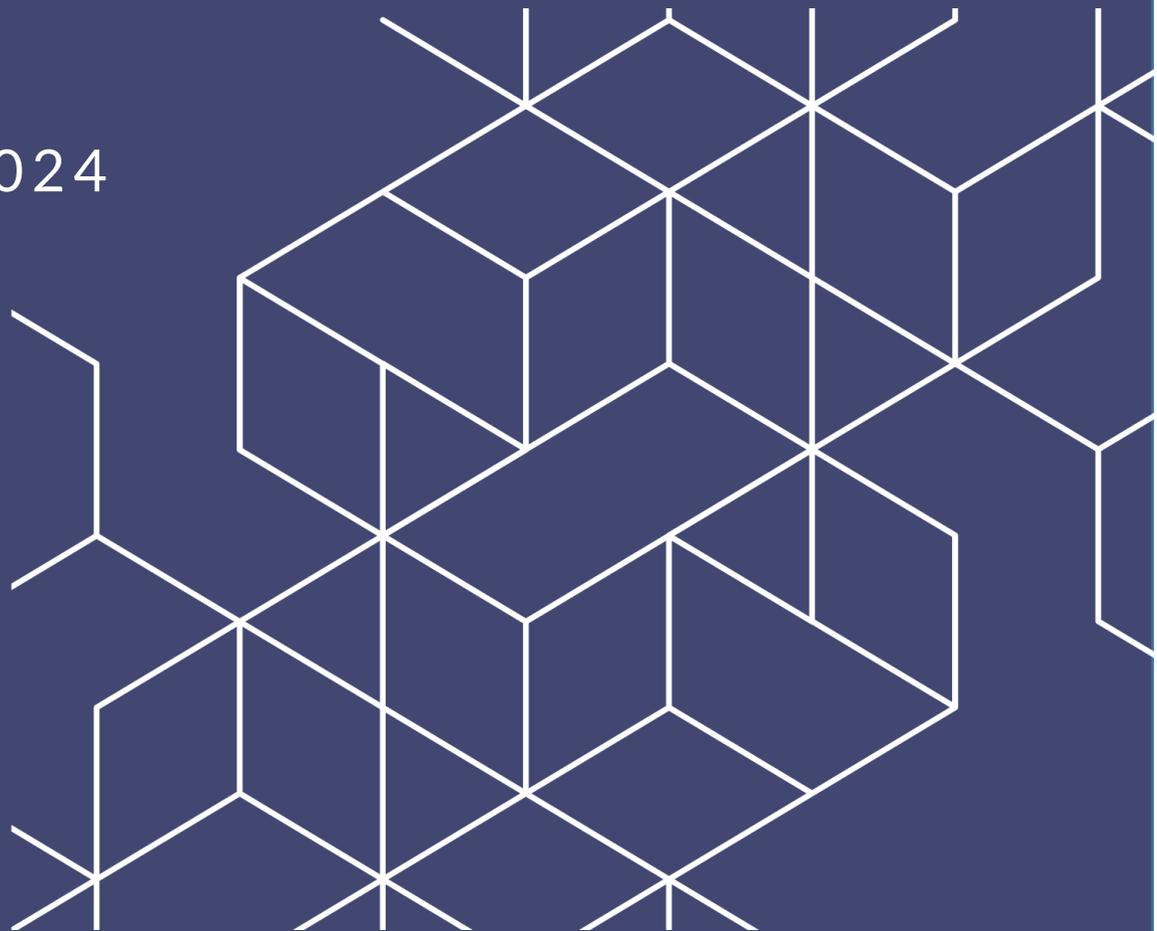
Investigations



## Release Notes

v5.16.0

August 2024



# eCASE Investigations 5.16.0 Release Notes

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# 1 Application Enhancements

The following new features were added to the latest eCASE Investigations release.

## 1.1 Approval Configuration Options

ID# 73349, 73352

We've added new Reviewer options for *Case Activity Approval Configuration* and *Significant Item Approval Configuration*.

First, select a **Workflow Type**:

- If **One Level Approval** is selected, you can fill out the *Who Can Submit* and *Reviewer 1* fields; the *Reviewer 2* and *Reviewer 3* fields remain disabled.
- If you select **Two** or **Three Level Approval**, you can select *Who Can Submit* and *Reviewer 1/2/3* respectively.
- If the field is left blank, then Reviewer approval is not required.

Case Activity Approval Configuration				
Workflow Type	Who Can Submit	Reviewer 1	Reviewer 2	Reviewer 3
Two Level Approval	Lead Agent	SAC	ASAC	

Significant Items Approval Configuration				
Workflow Type	Who Can Submit	Reviewer 1	Reviewer 2	Reviewer 3
Three Level Approval	Lead Agent	SAC	ASAC	Sensitive

## 1.2 Imported Contact Index Field Information

ID# 79634

We've added a new option to bulk import indexes (Contacts) via spreadsheet. This option is available via Investigations Configuration (**Main Menu > Configuration > Configuration**).

Select the **Index Import Configuration** tab to manage index imports.

This screen is divided into two sections. The **(A) Indexes Bulk Import Processing** section is used to configure and execute bulk index imports, while the **(B) Configure Spread Sheet Column to Index Field Mapping** section is used to create standard import mappings for each index type, allowing you to easily manage import profiles to import more indexes in the future.



Index Import Configuration

Assigned Office : OPEXUS - OPX-HQ Case Owner : Axel Blaze

**Indexes Bulk Import Processing**

A

Admin Admin X William Chen X

Notification

Index Type to Import

Source Indexes to Process

Attach xl sheet for indexes to be processed

Submit

Please save configuration before submitting!

Logs

**Configure Spread Sheet Column to Index Field Mapping**

Select Index Type:

Spreadsheet Column

Field Name

Is Unique?

Insert

## 1.2.1 Create Index Type Mapping

From here, you can manage import profiles for each unique index type. This allows for easy import as new contacts are added. Follow the steps below to create a field mapping:

1. First, move to the *Configure Spread Sheet Column...* section of the tab. Use the **(A)** *Select Index Type* dropdown to select the index type profile you'd like to configure.

**Note: One import profile is maintained for each unique index type. Selecting an index type from the *Select Index Type* dropdown will load any configured settings for that type.**

**Configure Spread Sheet Column to Index Field Mapping**

Select Index Type: A

Individual

Spreadsheet Column C

Field Name D

Is Unique?

E

Insert B

2. Here, you'll map all the columns you'd like to import from the spreadsheet. Click **(B)** *Insert* to add lines to capture additional fields for mapping.



3. Use the **(C)** Spreadsheet Column field to enter the ID for the corresponding column in the spreadsheet. This is the data that appears in Line 1 of the column to be mapped, for example “First Name” or “Full Name”.
4. Use the **(D)** *Field Name* dropdown to select the index field to map to this spreadsheet column.
5. If this field must be unique for each index, select the **(E)** **Is Unique?** checkbox.
6. Add as many columns as needed to map to your import spreadsheet.
7. Click **Save** at the top of the screen to save your changes.

## 1.2.2 How to Import Indexes

Once you’ve completed the mapping for your index type, follow the steps below to import indexes using your spreadsheet:

1. From the *Index Import Configuration* screen, first select the **(B)** *Index Type to Import* from the dropdown. This determines the mapping used to import these contacts.
2. In the **(A)** *Notification* field, you can add or edit the users who will be notified when this import is completed.
3. Click the **(C)** **Attach xl sheet for indexes to be processed** button to attach the .xls document you’re using for import.

The screenshot shows the 'Index Import Configuration' screen. At the top, there are tabs for 'AFU Field Configuration', 'Inventory Field Configuration', and 'Index Import Configuration'. Below the tabs, it shows 'Assigned Office : OPEXUS - OPX-HQ' and 'Case Owner : Axcel Blaze'. The main section is titled 'Indexes Bulk Import Processing' and contains several fields and buttons:

- Notification (A):** A field containing 'Admin Admin X' and 'William Chen X' with a search icon.
- Index Type to Import (B):** A dropdown menu currently set to 'Individual'.
- Source Indexes to Process:** A field containing a blue button labeled 'Attach xl sheet for indexes to be processed (C)'.
- Submit (D):** A large blue button labeled 'Submit' with a red warning message below it: 'Please save configuration before submitting!'.
- View Processed Index Attachment Log:** A field containing a blue button labeled 'Logs (E)'.

4. Click **Save** at the top of the screen when you’ve configured your import.
5. Next, click **(D)** **Submit**. The indexes will be created by a system job, and the users configured in the *Notification* field will be notified when this is complete.
6. You can also click **(E)** **Logs** to view a log of import activities:



Processed Index Attachments					
Hide Successful Entries <input type="checkbox"/>					
Date of Import	Imported Index Type	Import Result	Imported Attachment		
08/23/2024	Agency Employee(Test ED <input type="text"/> )	Error Occurred	<b>F</b> <a href="#">Imported Attachment(1)</a>	<b>G</b> View Errors <b>H</b> Resubmit	⊗
08/23/2024	Agency Employee(Test ED <input type="text"/> )	Success	<a href="#">Imported Attachment(1)</a>		⊗
08/23/2024	Agency Employee(Test ED <input type="text"/> )	Success	<a href="#">Imported Attachment(1)</a>		⊗
08/23/2024	Agency Employee(Test ED <input type="text"/> )	Success	<a href="#">Imported Attachment(1)</a>		⊗

**I** Return to Configuration

- For each entry, you can download the **(F) Imported Attachment**, **(G) View Errors** or **(H) Resubmit as needed**, or click **(I) Return to Configuration** to return to the prior screen.

## 1.3 New Form: Agency Employee Index Type

ID# 79636

We added a new Employee Information form to the Agency Employee index type. The fields on this form can be enabled, hidden, or marked required via configuration:

Search Index / New Agency Employee

Save
 Spelling...
 Back

Employee Information

Position Title	<input type="text"/>
Employee ID	<input type="text"/>
First Name	<input type="text"/>
Middle Name	<input type="text"/>
Last Name	<input type="text"/>
SCD Leave Date	<input type="text" value="mm/dd/yyyy"/>



## 1.4 New Fields: Evidence Folder

ID# 79653, 79654

We've added two new dropdown fields to the Evidence folder:

- **(A) Notes:** This field has been added to the Location section.
- **(B) Seized Pursuant To:** By default, this field is hidden. It can be enabled, disabled, and marked required on the *Evidence Field Configuration* tab in Configuration.

You can modify the display names for both fields in **Configuration > Terminology**.

Security	Terminology	Bulk Operations	Evidence Location Mapping	Contacts Field Configuration	Retention Policy	Index Relatic
Investigation_Labor_Rates_UIDF	Assistance Field Configuration	Update Index Permission	Outreach Field Configuration	NIBRS Configur		
Evidence Field Configuration	AFU Field Configuration	Inventory Field Configuration	Index Import Configuration			
Employer	EmployerO	Organization				
Evidence Seized Pursuant To	Seized Pursuant To					
Evidence Notes	Notes					
Occupation	OccupationI	Individual				



# 2 Bug Fix

The following bug fix was applied in the latest version of eCASE Investigations:

ID	Description
78260	Resolved a bug in which Attachments were not properly imported to the User Training List.

