General eSolve Help

eSolve is an investigation management tool that can be used in a wide variety of investigation types including: criminal, civil, intelligence, natural disaster, research and medical. It is designed to be flexible and easy to use. More information about the features and benefits of eSolve can be viewed on the eSolve Community website at www.esolve.ca.

All eSolve trees, lists and forms share a common method of operation; once you learn one form, you are well on your way to learning how to operate the rest of them. The main eSolve screen is divided into three sections: the Menu Bar, the Navigation Tree, and the List Window. In addition, you can view some program status information in the eSolve Footer; Current User, Default Project, and eSolve Version. In the top right-hand corner of the Header, you will find a Print Screen icon. Pressing this icon allows you to print a "snapshot" of the eSolve application and whatever is currently displayed.

Getting Help
Context-specific help is accessed through the "?" (Question Mark) button in the top right-hand corner of most forms. More extensive help, videos, and tutorials are available online in the eSolve Community (www.esolve.ca)

Print Screen
Most forms contain the ability to print the screen using the "P" button located next to the Help button. This function prints a copy of the contents of the eSolve application as currently displayed. The results can be directed to any any client-configured printer.

Menu Bar
Like most programs, main functions are accessed through the menu bar choices; Projects, Tips, Search, and so on. Selecting a menu bar choice either changes the Navigation Tree and subsequent List Window - or displays a form directly for data entry. Some menu choices may be hidden for security or configuration reasons. For example, The Entities/Quick-Form menu will not contain any choices until the user's Default Project has been set.

In addition, the menu bar contains a text entry box and Find icon on the right-hand side. Entering a word or phrase in the box and pressing the icon searches for matching entities where the word or phrase appears in the Descriptor of the entity record. Alternately, entering a numeric value will cause eSolve to look for matching entity unique "ID" numbers (ie: "4" returns Person 4, Organization 4, Location 4, and so on). More comprehensive search functions can be accessed using the Search menu choice.

The System menu choice contains functions that allow administrators to alter the configuration of eSolve, and allow users to change some account settings. It also contains the Logout function, which is used to close a session and log a user out of eSolve. Using the main-screen "X" in the upper -right-hand corner (adjacent to the Help button) will also log the user out of eSolve.

CAUTION: Closing eSolve using the "X" in the extreme upper right-hand corner (ie: the Main Program window) will close eSolve regardless of what record the user is in or what has been saved. DATA MAY BE LOST. No warning message is given. This is a limitation of the computer operating system. Thus, users are cautioned to close eSolve properly by using the Logout function.

Navigation Trees
Upon selecting a menu choice, the left-hand portion of the main screen will display a navigation tree with items consistent with the menu choice. Navigation Trees may be expanded by clicking the ">" arrow to the left of a tree node. Further choices are displayed. Nodes may be contracted by clicking the arrow again. Once a desired node is determined, selecting the node by clicking on the text will open the choice - either as a list in the List Window, or as directly as a form.

NOTE: Not all nodes activate a choice, as not enough information is available to render the list; choose

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a sub-node instead.

Lists
Lists are a convenient way of displaying data records in tabular form. Selected fields are displayed in the columns of the list to allow the user to identify and select the correct record. Record values cannot be edited directly in a list; lists are used exclusively to identify and select records. To display a record in a form for editing or further processing, click the appropriate row. All eSolve lists share some common elements:

Main Header: Displays the title of the List [left], page navigation buttons [center] - if the number of records exceed the available display space, and "Action" buttons [right] that allow list-specific functions to be accessed (ie: New, Print, Delete, Group). Not all lists have the same button choices, and some may be hidden for security reasons (ie: the user does not have the rights to Delete records).

Column Header: Each column represents a field in the data table. Clicking on a column header name (ID for example), will automatically sort the list by the column. Re-clicking the column header will reverse the sort order. In some instances - when a list is Grouped by a column, the ability to sort by individual columns is disabled. Many lists have Print, All and Clear buttons. The Print button is used to print PDF reports on selected records. A selection of report types appears after you click print. The All and Clear buttons are used to check Alll records in the list - or Clear all checkboxes.

Checkbox Columns: Some lists contain a checkbox column on the far right-hand side. Checkbox columns are used in conjunction with specific list buttons to perform operations on multiple records at the same time. For example, you may want to delete the first, third and ninth records in a list. Placing a check in these rows and then clicking the Delete button will accomplish the task. NOTE: some buttons are disabled until one or more records are checked.

Footer and Filters: Most eSolve list footers contain a sophisticated filter mechanism that allows users to further refine the displayed records by filtering on one or more columns for desired values. To activate a filter, enter a value (or portion thereof) into the box directly below the column that you want to restrict the values on. Filter fields use a type-ahead feature; after a short pause, the list is re-displayed with records that only match the filtered value in that column. Most filters are applied in "search" mode (ie: entering "Own" will return records containing Owner, Brown, and Known Values are case insensitive. Some filter selections are restricted to a drop-down list. More than one filter value can be applied simultaneously; the results display are "AND" between each filter field value. Filter settings are remembered for each list and user until they are reset (using the Reset button). Thus, revisiting the same list used in our example a a later date will automatically restrict the list the next time it is displayed. To insure you are seeing ALL available values, click the Reset button.

In addition, lists of Projects, Assignments, Responses, and Alerts will have different colored rows depending on the status of the record:

HIGH priority records will have a RED background

LOW priority records will have a GREEN background

CONCLUDED records will have a GREY background with WHITE text

OVERDUE records have a dark RED background with ITALIC WHITE text

EXPIRED records (Alerts) will have a BLUE background with GREY text

Charts
eSolve charts display information about the statistics and metrics of eSolve. Charts also provide a method of navigating to groups of records by clicking on the desired chart element.

Forms

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Forms display a single data record for viewing, editing, or further investigation of related records (ie: linked entities). Data is displayed in field boxes of several types - depending on the type of data the field holds - and if the value will be restricted or dependent on another field. More complex forms also have navigation trees and lists to view more information about the record, related (linked) records, or output functions (reports). Most forms contain common elements:

Header: Displays the record type [left], the UNIQUE record number [center], and buttons for:

- X: Closing the form WITHOUT saving.
Note: eSolve will NOT notify you that you may be abandoning unsaved data.
- ?: Getting Help
- OK: Saving the record and closing the form
- Apply: Saving the record and keeping the form open
- OK & New: Saving the Record and clearing it to enter a new record
- Some forms have mode-specific buttons.

Body: Fields where the label is RED are mandatory fields; you cannot save a record with a blank value in a RED field. The body of most forms contain icons and buttons that are specific to a field operation. For example, most text-memo fields also have a Spell Check icon and a "More" (double arrow) button (that opens the field in a larger form for easy editing). When a field value is to be selected from a drop-down list, and the number of possible values is very large, a sub-form opens that allows the user to choose a record from a list. Most of these lists have multiple columns and filters to allow the user to make an easy selection. Some forms are disabled until selection is made of a "parent" field. For example, you cannot select a "sub-type" value until a "type" value is first selected. Date fields always open a Calendar selection form. In some cases a time value is also allowed with the date.

Image Viewer
Each entity has a Linked Images viewer on the "home" page. It displays all linked eRecord JPG, GIF and PNG image files. eRecord file security is respected; images associated to eRecords the user does not permission to are blocked from displaying. The hyperlink controls on the viewer are:

NAVIGATION Users can page through the images using the navigation hyperlinks at the bottom of the viewer. In addition, the D hyperlink in the middle of the navigation controls can be used to re-display the Default image.

SET DEFAULT One image can be marked as the Default image for that entity simply by using the Set Default hyperlink.

NEW eRECORD The default image will display every time the entity form is opened. New images can be uploaded by using the New hyperlink. Once the form is completed and the file is chosen, a new eRecord, assocaited eRecord file, and link to the target entity are created. The new image is also marked as the entity Default image.

NEW LINK Creates a new link to an existing eRecord using the traditional linking screen.

GOTO Choosing the GoTo hyperlink displays the source eRecord that is associated to the image file.

EXPAND or ORIGINAL SIZE Expand scales the image to the maximum viewer window size. Some distorting of the image can be expected. Once expanded, The image can be restored to the original size.

Security
All eSolve records are protected by a sophisticated security system that prevent unauthorized viewing and manipulation of records. Thus, users may be restricted to functions in a variety of ways:

READ (Viewing) Records: A message appears informing the user that access to the screen is denied.

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CREATE (New) Records: A message appears informing the user that access to the screen is denied or - OK and Apply buttons are hidden.

EDIT (Change) Records: OK and Apply buttons are hidden.

DELETE Records: A message appears informing the user they do not have sufficient permissions to DELETE one or more records.

CONCLUDE Records: A message appears informing the user that they do not have sufficient permissions to CONCLUDE the record

SYSTEM Changes: A message appears informing the user that access to the screen is denied.

SECURITY Changes: A message appears informing the user that access to the screen is denied.

Security values for any object (record) can be accessed using the "Lightning Bolt" icon on most forms. Permitted values are 0 to 99 for any security type. Users must have greater than or equal to values in the corresponding type to gain access to that function.

User accounts can be additionally restricted to display only those records directly related to the user's agency (see System Administration - Security - Users). Any user account so restricted is indicated on the main screen by the word Restricted beside the user's name on the left side of the footer.

Reports
All eSolve reports are rendered to PDF format and displayed in a new browser window. Thus, to view reports, the client computer must have the Adobe PDF Reader installed and configured for operation with the client's default browser. The Adobe Reader is available free of charge at www.adobe.com.

All report content respects the record security established by eSolve. Report content format is fixed and specific to the report type. Custom Report Design service is available to eSolve Community members (www.esolve.ca).

Keyboarding and Other Tips
eSolve uses the Adobe Flash environment for the user interface. Thus, some keyboarding conventions may be slighty different. Here are some tips to help you navigate through eSolve using the keyboard.

TAB: You may use the "TAB" key to move focus from field to field on a form. The order generally follows top to bottom and right to left. Once the bottom of the tab order is reached, the curser moves to the top field in the order.

SPACE BAR: The SPACE BAR can be used to activate a button that has focus. Unlike many programs, the ENTER key does NOT activate a button choice.

DROP-DOWN Accelerator keys: Once focus is in a DROP-DOWN list box, you can use the appropriate "alpha" keyboard key to move quickly to that section of the list. For example, if you want to select "Inactive" from a drop-down list, simply press the "I" key. Subsequent presses of the same key cycles through selections that begin with that letter. This feature will not work on drop-down lists that open a new Selection List, but you may press the SPACE BAR to open the list.

NOTE: The Flash Player uses a different style of "wait symbol" to indicate system processing than regular Windows; the "rotating circle". For reliable eSolve operation, wait until all system processing is complete (ie: the rotating circle has disappeared) before continuing work.

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Assignments

The ASSIGNMENT form is used to record and administer all directives associated to a PROJECT. There are several Types and Subtypes of ASSIGNMENTS.

Choose a Type of ASSIGNMENT that best outlines the type of activity that will be performed during the task.

As one of the advantages of the ASSIGNMENT form is to track the progress of all directives by: assigned to, assigned from, type, status, priority, and due date; make sure you complete all of these data entry areas as completely as possible.

Once an ASSIGNMENT has been created, then the PERSON the task has been assigned to may report on the various and multiple steps toward completion of the ASSIGNMENT. This is done by creating RESPONSES.

There may be multiple ASSIGNMENTS related to a PROJECT.

The ASSIGNMENT FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key details regarding the Assignment, including the Type, Status, User Accountable, and the Details narrative.

Entity List Window Pane (Bottom Right). This contains any list of entities as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Assignment. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open. For example of Table of Contents: Conclude / Summarize, Send e-Mail, Direct Responses, Associated Tips, Links, and Reports.

By default, a List of all of the RESPONSES to the ASSIGNMENT will appear in the Entity List Window Pane.

By filtering / sorting the RESPONSES LIST the User has the ability to view the RESPONSES by Status, Type or Title. For example, if a Manager wanted to look all RESPONSES flagged by the User as ?Direction Required? they would do so using this feature. Clicking on the heading in the LIST sorts the columns. Selecting GROUP on the RESPONSE LIST, clusters the records into RESPONSE TYPES. Typing text into the FILTER fields and then clicking on the APPLY button displays records containing that specific text in that specific field only. Clicking on RESET removes all filters.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Projects

The PROJECT form is used to collect details regarding the scope of the initiative. There are various Categories and Sub-Categories of PROJECTS:

Choose the Category that best represents the focus of your project. (NOTE: Project Categories can be created in the ADMINISTRATION section)

Select the level of priority and the various persons who have supervision and management accountability for the project. Be sure to provide sufficient detail as to the purpose or mandate of the project. The title should include text that adequately labels the initiative.

Once the project has been created, then information and intelligence can be collected and considered CHILD Records of the PROJECT.

ALL records created during data entry to the PROJECT will be associated as CHILD Records. If necessary, important entity records can be linked directly to the PROJECT.

A logical next step is to create various Assignments which will result in the collection of entity information.

Other Entity information, Assignments, and Responses cannot be recorded in eSolve until a PROJECT has been created. The PROJECT serves as the ?root entity? and all additional records added to the system are indirectly linked to this or another specific project.

To simplify mass data entry, a DEFAULT PROJECT can be specified.

The PROJECT FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key details regarding the Project, including the Category, Status, User Accountable, and the Scope narrative.

Entity List Window Pane (Bottom Right). This contains any list of entities as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Project. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open. Example of Table of Contents: Conclude / Summarize, Assignments, Send e-Mail, Links, Child Records, Reports.

By default, a List of all of the ASSIGNMENTS to the PROJECT will appear in the Entity List Window Pane.

By filtering / sorting the ASSIGNMENT LIST the User has the ability to view the ASSIGNMENTS by Status, Type, Descriptor, and Assigned To. Clicking on the heading in the LIST sorts the columns. Selecting GROUP on the ASSIGNMENT LIST, clusters the records into ASSIGNMENT TYPES. Typing text into the FILTER fields and then clicking on the APPLY button displays records containing that specific text in that specific field only. Clicking on RESET removes all filters.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Send E-mail

The Send e-MAIL form is a method to send an electronic internet mail or intranet mail (secure) communiqu? through the network attached to the eSolve environment.

When selecting Send e-MAIL from the System Dropdown Menu, the form is blank. However, when selecting Send e-MAIL from within any Entity Record, the Message text area is populated with a snapshot of the key details / information about the entity.

Additional text may be added and/or the snapshot information may be edited or removed.

The Send e-MAIL feature is an excellent way to send details about an eSolve Project or Entity to someone external to the eSolve working environment. However, e-MAIL messages sent in this manner are not saved within the e-Solve application. This connection depends upon the existing mail client system installed on the Users computer.

In order for the e-MAIL option to function, it needs to be set up by the eSolve Administrator in advance.

Responses

The RESPONSES form is used to reply to, or record the progress of an ASSIGNMENT. There may be multiple RESPONSES related to an ASSIGNMENT.

Similar to PROJECTS and ASSIGNMENTS, there are many different Types and Subtypes (Categories) of RESPONSES. The list of Types can be customized, however, some of the standard choices include: Interview, Research, Surveillance, Analysis, System Checks, and Enquiry Results.

A RESPONSE form also includes a field that allows the User to track the hours of ?effort? associated to completing the individual RESPONSE.

Traditionally, a RESPONSE reports on the activity of the User, specifically as it relates to the work performed or findings of an ASSIGNMENT, with a direct reference to a date and time ?stamp?. For example, if the RESPONSE was associated to an ASSIGNMENT for surveillance, each RESPONSE would represent an observation tied to a time.

A series of RESPONSES may also represent a number of telephone calls or computer enquires to different numbers / sources. Each call or data search would be represented by a single RESPONSE.

The RESPONSE FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key details regarding the Response, including the Author, Date-Time, Type, Status, Priority, and Progress Narrative.

Entity List Window Pane (Bottom Right). This contains any list of entities as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Response. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open. For example of Table of Contents: Conclude / Summarize, Send e-Mail, Links, and Reports.

By default, a List of all of the LINKAGES to the RESPONSE, grouped by entity type, will appear in the Entity List Window Pane.

By filtering / sorting the LINKS LIST the User has the ability to view the RESPONSES by Status, Reason Code or Entity Descriptor. Clicking on the heading in the LIST sorts the columns. Typing text into the FILTER fields and then clicking on the APPLY button displays records containing that specific text in that specific field only. Clicking on RESET removes all filters.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Users

The USER form is where a NEW USER can be created within eSolve or existing user values can be edited.

Before anyone can access the program, they must be a USER which includes:

LOGIN * - a short alpha-numeric UNIQUE value to identify the user (ie: dsmith, jbrown)

NAME * - the full name of the person (used in selection lists)

AGENCY * - the eSolve Agency to which this user belongs

TYPE * - the type of user

E-MAIL - the e-mail address of the user (used to send emails from within eSolve)

STATUS * - the status of the user

GROUP - the associated GROUP that the user belongs to (used to determine security rights)

ROLE - in lieu of a GROUP, an individual ROLE can define the user's security rights

PASSWORD * - the password that grants program access (requires confirmation)

DEFAULT PROJECT - the default parent PROJECT used when a user creates a new entity

NOTES - optional comments about the user's account

NOTE: either a GROUP or a ROLE must be selected for a user account, but not both.

The values for Status and Type are determined by the System Administrator and can vary with each eSolve installation.

The Restrict to Agency Data checkbox will limit the records displayed to only those associated to their agency (as determined by the parent Project of the records). Thus, users will not be aware of records associated to other agencies, which may result in duplicate records being created. Standard eSolve security still applies regardless of this setting. Selecting this setting requires the user to re-logon to take effect. The word "Restricted" appears beside the user's logon name on the left hand side of the main screen footer as a reminder that the user account is restricted to agency data only.

Checking the "Suspend Account" checkbox temporarily disables the account from logon without altering other account settings.

Checking the "Can Send Email" checkbox enables the user to send emails to eSolve. eSolve will allow emails from the email address of the user.

Checking the "Use Default Project" enables or disables this feature without altering the default project settings.

Set User Password

Any User can CHANGE their individual PASSWORD by re-typing their current (old) password, then their NEW password twice. Access this function by selection System \ Change Password.

The system administrator determines the ?complexity standards? for all passwords with business rules.

eSolve will allow any password configuration regardless of character type or length.

Set User Password

Any User can CHANGE their individual PASSWORD by re-typing their current (old) password, then their NEW password twice.

The system administrator determines the ?complexity standards? for all passwords with business rules.

eSolve will allow any password configuration regardless of character type or length.

Owner Agency

The OWNER AGENCY identities the Organization for whom the current version of eSolve is Registered and Validated. In essence, the Owner Agency is the Licence holder of eSolve.

The Owner Agency will appear in the ORGANIZATIONS LIST as Record Number One (1) and will be highlighted in Red.

The name of the OWNER AGENCY will appear in the TOP HEADER of the eSolve application.

The name of the OWNER AGENCY will appear in all REPORTS.

The RE-REGISTER button allows the instance of eSolve to be registered to another agency - or allows the Agency Owner name to be changed. As the regsitration key contains the encrypted Agency-Owner name, a new Registration Key is required. Thus, the instance of eSolve will be rendered inoperative until a NEW key is entered. Keys can be obtained by applying online at www.esolve.ca.

Quick Text

Quick Text is available in many of eSolve's memo fields (e.g. the History or Notes fields) and can be used to store and recall frequently used phrases or even paragraphs. Entries made to the Quick Text list are available to ALL eSolve users in any memo field where the Quick Text hyperlink is found.

NOTE: When a Quick Text selection is used, it will REPLACE ALL text in the given memo field.

Selection Lists

The SELECTION LIST ENTRY form refers to the drop down lists that appear on a number of Solve forms. The contents of these drop down lists can be customized.

For example, PERSON TYPE. These include: Witness, Victim, Person Involved, Person of Interest, Suspect, Investigator, etc. To add to the list of choices, use the SELECTION LIST ENTRY form.

The DISPLAY field identities the text name that will appear in the drop down menu. If appropriate, the VALUE passed to the record can be different than the display. eSolve determines if this is permitted.

The DISPLAY ICON identities the graphic that will appear in a NAVIGATION TREE (not all Selections List types are used in trees).

The SORT field allows you to assign an order to the drop down list, as it compares with the other items in the list. This is an arbitrary number between 1 and 999.

When appropriate, the value may require a "Parent" link - that is - an associated parent value that the current value is dependent upon. For example, the Person Subtype is dependent on what value was chosen for the Person Type. Thus, you must choose a Parent link Type value when entering a Subtype. eSolve determines when a Parent Link is required.

SELECTION LISTS may be set to apply to all PROJECTS or a specific PROJECT.

The MAINTAIN INTEGRITY checkbox is used when a Selection list value is changed and you want to update all records that have used the previous value to the new value.

The LOCK checkbox locks the Selection List value to protect against further changes. Once locked, a Selection List record cannot be altered regardless of the user's permissions.

The DEFAULT checkbox selects this entry as the default entry that will be chosen in cases where no item is chosen.

Conclude/Summarize Assignment

The CONCLUDE SUMMARIZE ASSIGNMENT form allows for the insertion of comments or text from the User assigned to the Assignment, a Supervisor, and a Manager of the Assignment.

There are also five (5) categories of FLAGS that include multiple dropdown lists. These include:

Analysis ? reference to the evaluation and verification.

Disclosure ? reference to judicial preparation.

Reporting ? reference to dissemination.

Audit ? reference to data entry.

Export ? reference to data migration.

The CONCLUDED checkbox allows the Assignment to be flagged as Concluded - regardless of any other flags or their status. Once Concluded, the Assignment field values cannot be edited; the OK and Apply buttons are hidden and the Assignment is "watermarked" Concluded.

In addition, check either the "Conclude Associated Responses" or/and "Conclude Associated TIPs" checkboxes to automatically conclude associated Responses or TIPs. Conclude permissions are checked against each record and ONLY those Responses or TIPs where the user's Conclude permission meets or exceeds the record's Conclude permission will be concluded. These options are disabled if the CONCLUDED checkbox has not been selected.

To "unconclude" an Assignment the user must first alter the WRITE permissions on the Assignment - concluding the Assignment sets this value to "100" - beyond the security value of any user. The value can be set to anything equal to or lower than the user's WRITE permissions. Once reset, the Assignment OK and Apply buttons will be available and the Concluded checkbox can be unchecked and the record saved.

Roles

ROLES are created for the purpose of representing a set of OBJECT SECURITY and ACCESS LEVEL permissions within eSolve. In order for a USER to receive permission to read, write, create, conclude or delete records, they must be assigned to a specific role. Roles can be assigned individually, or by way of associating a user to a group - the user inherits the role assigned to the group.

Setting the FUNCTION PERMISSIONS for any role will cascade those permissions down to all USERS assigned to that role or included in that GROUP that is assigned to that role.

NOTE: Changes to a USER's permissions will take effect the next time the user logs in.

Groups

A GROUP represents a LIST of USERS assigned to a specific ROLE.

ROLES are created for the purpose of representing a set of OBJECT SECUITY and ACCESS LEVEL permissions within eSolve. In order for a USER to receive permission to read, write, create, conclude or delete records, they may be assigned to a specific role.

To ADD a USER to the GROUP List, click on the ADD button. A list of all available USERS will be displayed. Highlight the USER and click on OK. Adding a user to a group will automatically remove an individual role assigned to that user and substitute the role assigned to the group.

DELETING a user will remove the user from the group and will individually assign the group's role to the user.

Project Templates

Project Templates are used to quickly create a new PROJECT based on values pre-defined within a template. Much like a Word Document template, common values are "pasted" into a new Project to pre-populate critical fields before the Projct is saved. This saves time and promotes consistency. In addition, a set of Assignment templates can be created for each Project template. Thus, when a new Project is created from a template, new Assignments are also automatically created; one for each Assignment template associated to the Project template. Project templates are managed from the System Administration -> Project Templates list. To create and manage Project templates, select a template from the list or click the New button:

Complete the Project template form as you would for any other Project
Click Apply to save the new template. The lower half of the screen reveals the Assignment template list.
Optionally, use the Notifications hyperlink to set the automatic Email notification options for the project
Create new Assignment templates by clicking the New button. There is no limit to the number of Assignment templates that can be associated to a Project template.

Assignment templates can be edited by clicking on them from the Assignment list and editing the values in the form.

To create a new Project from a template:

Use the Add New Project tree node or the New button from the Project list. A list of available templates is displayed.
Select a template by placing a checkmark beside the desired template
Click the Select button. A confirmation message appears confirming your action.
Once confirmed, a Project is created, along with a series of new Assignments.
The new project is displayed in the standard Project form.

An unlimited number of templates can be created and stored in eSolve.

Object Security

The OBJECT SECURITY settings will determine the permissions / access level for the selected object / record / function in eSolve. Every Project, Assignment, Response, and Entity has its own set of object permission values. Assignments and Entities receive their default permission values from the "parent" Project - the project that was first used to create the entity. Responses receive their default permissions from the "parent" Assignment. Once created, indvidual permissions can be altered using the "lightning" icon found on each form.

Some "system" related objects also require security and they can be accessed from System Administration tree under "Object Permissions". System object permissions are pre-defined at the time of eSolve installation.

OBJECT SECURITY is divided into seven (7) categories that can be individually defined. These categories of security include:

Security - permission to view & change security settings on the object record

System - reserved for future enhancements

Read ? permission to read (view) the object record

Write ? permission to edit the object record

Create ? permission to add a new object record

Conclude ? permission to conclude an object record (if applicable)

Delete ? permission to delete an object record

The setting can be a value from 1 to 99. The higher the number for the category, the greater the level of security permissions for a User are required. For example, if the number in the box labelled READ was 50, a User would require a 50 or above within there own USER record security in the box labelled READ. Users are not allowed to set an individual object permission value higher than their own corresponding value. For example, if the user's READ value is 50, they cannot set the READ permission value on an object to 51 (or higher).

Note: Regardless of READ permissions, ANY user can search for - or view a list - of ALL objects; the basic metrics and Descriptor are NOT hidden. However, a user must have sufficient READ permissions to view the object form; the details of the record. This design feature prevents "the existence of intelligence" from being missed during a search, while protecting confidential data. Thus, eSolve managers should carefully consider what information is to be displayed in an object descriptor.

Note: DELETE permission should be set at a very high number and limited to advanced administrative personnel.Deleting a record in eSolve is permanent.

The "Max" button sets all object permissions the MAXIMUM allowed by the user's account.

The "Clear" button sets all permission values to "0", thus allowing full object access to any user. Use this button with caution.

The "Lock Security Settings" checkbox allows the object security to be locked to prevent further changes to values Once locked, the security settings for that object CANNOT be unlocked, regardless of the user's security rights. Use this feature with caution.

Conclude/Summarize Project

The CONCLUDE SUMMARIZE PROJECT form allows for the insertion of comments or text from the User assigned to the Project, a Supervisor, and a Manager of the Project.

There are also five (5) categories of FLAGS that include multiple dropdown lists. These include:

Analysis ? reference to the evaluation and verification.

Disclosure ? reference to judicial preparation.

Reporting ? reference to dissemination.

Audit ? reference to data entry.

Export ? reference to data migration.

The CONCLUDED checkbox allows the Project to be flagged as Concluded - regardless of any other flags or their status. Once Concluded, the Project field values cannot be edited; the OK and Apply buttons are hidden and the Project is "watermarked" Concluded.

In addition, check one or more of the "Conclude Associated Assignments", "Conclude Associated Responses", or "Conclude Associated TIPs" checkboxes to automatically conclude associated Responses or TIPs. Conclude permissions are checked against each record and ONLY those Assignments, Responses or TIPs where the user's Conclude permission meets or exceeds the record's Conclude permission will be concluded. These options are disabled if the CONCLUDED checkbox has not been selected.

To "unconclude" a Project, the user must first alter the WRITE permissions on the Project - concluding the Project sets this value to "100" - beyond the security value of any user. The value can be set to anything equal to or lower than the user's WRITE permissions. Once reset, the Project OK and Apply buttons will be available and the Concluded checkbox can be unchecked and the record saved.

User Account Status

The USER ACCOUNT STATUS outlines the details of the User. This form displays the FUNCTION PERMISSIONS specific to the User.

Subject to the User?s ACCESS LEVELS, your permission may be modified between 1 and 99. One (1) represents the lowest access level, where ninety-nine (99) is the highest.

If a User is unable to view an object record (example PERSON form) it may be because the object level security of that record is high than the User FUNCTION PERMISSIONS.

The LIGHTNING BOLT ICON on each object entity record displays the Function Permissions for that individual object record.

Add Links

The ADD LINKS form will appear every time the USER wants to create a linkage from one entity to another.

To create a linkage between entities, the USER will be in a record, move to the NAVIGATION TREE and, where applicable, select an ENTITY TYPE from the LINKS choices.

Existing LINKS will be displayed in the Entity List Window Pane (bottom right or bottom) of the specific record.

Selecting NEW in a LINKS LIST will launch the ADD LINKS form.

The ADD LINKS FORM LAYOUT is configured as follows:

Information Window Pane (Top). This contains the key particulars about the Linkage, including the Link Source, ROOT ENTITY to be Linked, Reason Code, Reason for the Link, Dates representing the validity of the Linkage, Reference, Direction, and Status. The Information Window Pane will also include Grading so that the link can be evaluated. This Grading may include any combination of the following and the dropdown selection can be customized:

- Confidential
- Secret
- Restricted
- Sensitive
- Confirmed Reliable
- Believed Reliable
- Unknown Reliability
- 1
- 2
- 3

There are also four (4) categories of FLAGS that include multiple dropdown lists. These include:

- Analysis ? reference to the evaluation and verification.
- Reporting ? reference to dissemination.
- Audit ? reference to data entry.
- Export ? reference to data migration.

Entity List Window Pane (Bottom). This contains any list of entities specific to the type of entity selected for linkage. For example: if linking a PERSON to a PERSON, only the list of all available PERSON records will appear in this view. The User can view an Entity record, from any of the lists that appears in this view by clicking on the record. To select the record to be linked to the ROOT ENTITY displayed in the Information Window Pane, click on the box next to the record. Multiple records can be linked from the list to the Root Entity, however, the identical details in the Information Window Pane will be applied to all of the linkages. The FILTERS at the bottom of the LIST may be used to narrow the search for the applicable record(s) to be linked.

Edit Link

The EDIT / VIEW LINKS form will appear every time the USER selects an existing linkage between one entity and another. Existing LINKS will be displayed in the Entity List Window Pane (bottom right or bottom) of the specific record. To edit or view a linkage between entities, the USER will be in a record, move to the LINKAGE LIST in the Entity List Window Pane and select a record item from the LIST. Selecting an item from the LIST launches the EDIT / VIEW LINKS form. The EDIT VIEW LINKS FORM LAYOUT is configured as follows:

Information Window Pane (Top). This contains the key particulars about the Linkage, including the Link Source, ROOT ENTITY that is currently Linked, Reason Code, Reason for the Link, Dates representing the validity of the Linkage, Reference, Direction, and Status. The Information Window Pane will also include Grading so that the link can be evaluated.

This Grading may include any combination of the following and the dropdown selection can be customized:

- Confidential
- Secret
- Restricted
- Sensitive
- Confirmed Reliable
- Believed Reliable
- Unknown Reliability
- 1
- 2
- 3

There are also four (4) categories of FLAGS that include multiple dropdown lists. These include:

- Analysis ? reference to the evaluation and verification.
- Reporting ? reference to dissemination.
- Audit ? reference to data entry.
- Export ? reference to data migration.

LINK TARGET Window Pane (Bottom). This contains the details of entities specific to the type of entity selected for linkage.

The LINK TARGET is ?greyed? indicating that the details on the fields cannot be edited and it is for viewing purposed only.

The LINK TARGET can be changed to another record by selecting the GO TO button on the top right of the Link Target form. If you choose to GO TO, then the linkage information currently displayed will be permanently lost.

When EDITING the LINKAGE ENTITY, follow the same steps as creating a NEW LINKAGE.

EXAMPLE: if linking a PERSON to a PERSON, only the list of all available PERSON records will appear in this view. The User can view an Entity record, from any of the lists that appears in this view by clicking on the record.

To select the record to be linked to the ROOT ENTITY displayed in the Information Window Pane, click on the box next to the record.

Multiple records can be linked from the list to the Root Entity, however, the identical details in the Information Window Pane will be applied to all of the linkages.

The FILTERS at the bottom of the LIST may be used to narrow the search for the applicable record(s) to be

Edit Link

linked.

Conclude/Summarize a Response

The CONCLUDE SUMMARIZE RESPONSE form allows for the insertion of comments or text from a Supervisor and a Manager of the Response.

There are also four (4) categories of FLAGS that include multiple dropdown lists. These include:

Analysis ? reference to the evaluation and verification.

Reporting ? reference to dissemination.

Audit ? reference to data entry.

Export ? reference to data migration.

The CONCLUDED checkbox allows the Response to be flagged as Concluded - regardless of any other flags or their status. Once Concluded, the Response field values cannot be edited; the OK and Apply buttons are hidden and the Response is "watermarked" Concluded.

To "unconclude" a Response the user must first alter the WRITE permissions on the Response - concluding the Response sets this value to "100" - beyond the security value of any user. The value can be set to anything equal to or lower than the user's WRITE permissions. Once reset, the Response OK and Apply buttons will be available and the Concluded checkbox can be unchecked and the record saved.

Reason Codes

The REASON CODE form is directly related to LINKAGES. In order to link any entity / object record to another entity / object record, the USER utilized the ADD LINKS FORM. In this form one of the mandatory fields is CODE.

The CODE is a dropdown menu of all available REASON CODES to link this entity / object to the specified type of entity / object selected.

REASON CODES need to be created in order to explain the purpose of the linkage between entities. For example, a REASON one PERSON may be linked to another PERSON may include:

Family

Know By

Neighbour

Spouse

Suitor

To create a NEW REASON CODE, you must first type the text that best describes the linkage reason. Using generic or general descriptors is best.

The TYPE field is a drop down menu that is used to identify what category or entity is to be linked to what other category or entity. For example: Activities2Objects means the linkage reason code represents a linkage between an Activity and an Object.

The DEFAULT selection means the code will be used as the default (automatic) value whenever a code of this link type is required. There can only be ONE default code per type.

Entity Supervisor/Manager Comments

The SUPERVISOR-MANAGER COMMENTS form allows for the insertion of comments or text from a Supervisor, and a Manager, with a direct reference to the entity record.

There are also five (5) categories of FLAGS that include multiple dropdown lists. These include:

Analysis ? reference to the evaluation and verification.

Disclosure ? reference to judicial preparation.

Reporting ? reference to dissemination.

Audit ? reference to data entry.

Export ? reference to data migration.

Entity Source/Grading

The EDIT ENTITY SOURCE form is used to GRADE the reliability and potentially security classification of the entity record.

The Type of SOURCE and physical reference identifier can be recorded along with three (3) levels of Grading. This Grading may include and combination of the following and the dropdown selection can be customized:

Confidential

Secret

Restricted

Sensitive

Confirmed Reliable

Believed Reliable

Unknown Reliability

1

2

3

The Icon value is an image representation of the entity type and subtype. It can be chosen from relevant short-list of icons for the entity, OR by clicking the "Show All" button, the User can select any icon. If specified, the icon is set to the default value every time a new record is created.

Entity Notes

The NOTES form for the entity record is a free text area where the USER can enter information that may not be applicable in any other field in the entity form.

The text should include the date the note was received or recorded.

Multiple notes from multiple sources may be contained within this same text field.

Notes should not be a substitution for ASSIGNMENTS or RESPONSES.

Organizations Entity

The ORGANIZATION RECORD form is used to record details with regards to an organization, agency, enterprise, association, etc.

There are many different Types and Subtypes of ORGANIZATIONS. The list may be customized, however, some of the standard choices include: Client, Agency, Vendor, Association, Business, etc.

The ORGANIZATION FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the Organization, including the Name, Identification Numbers, Purpose, Size, Financial Worth, Inception Date, Status, Scope, and Level of Operations, etc.

The DESCRIPTOR field can be populated by toggling the round button just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Organization record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open:

Advanced Attributes: will launch the User to a selection of additional forms that are unique to an ORGANIZATION type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.

Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the record.

The more basic information or particulars about a ORGANIZATION are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Entity Description

The DESCRIPTION form for the entity record is a free text area where the USER can enter information that best articulates the current physical attributes of the entity.

The text should include the date the description was received or recorded.

Multiple descriptions from multiple sources may be contained within this same text field.

Agency Owner Organization

The Agency-Owner organization is a special Organization record. This organization is setup by default when eSolve is registered. The name, type, subtype and status cannot be changed without re-registering, nor can the organization be deleted. The name is used on the title of all eSolve reports.

There are many different Types and Subtypes of ORGANIZATIONS. The list may be customized, however, some of the standard choices include: Client, Agency, Vendor, Association, Business, etc.

The ORGANIZATION FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the Organization, including the Name, Identification Numbers, Purpose, Size, Financial Worth, Inception Date, Status, Scope, and Level of Operations, etc.

The DESCRIPTOR field can be populated by toggling the round button just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Organization record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open:

Advanced Attributes: will launch the User to a selection of additional forms that are unique to an ORGANIZATION type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.

Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the record.

The more basic information or particulars about a ORGANIZATION are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Set Default Project

Any USER can select a DEFAULT PROJECT which will be associated to that USER every time they login to eSolve. By selecting a DEFAULT PROJECT, the User will not be prompted to select a PROJECT every time they wish to add an Entity record, whether a TIP, ASSIGNMENT, PERSON, ORGANIZATION, LOCATION, OBJECT, EVENT, TRAVEL, etc. Instead, the DEFAULT PROJECT will automatically be selected and associated to the data entered by the User.

Select the Project form the Dropdown Menu.

Check off the box labelled ?Use Default Project?.

If a User every wants to LINK an ENTITY to ANOTHER PROJECT, de-select the box labelled ?Use Default Project?.

Persons Entity

The PERSON RECORD form is used to record details with regards to an individual.

There are many different Types and Subtypes of PERSONS. The list may be customized, however, some of the standard choices include: Witness, Victim, Person Involved, Suspect, Charged, Canvassed, Investigator etc.

The PERSON FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the Person, including the Last Name, First Name, Middle Name, Known As, Identification Number, Birth Date, Sex, and Status. The DECRIPTOR field can be populated by toggling the round button just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the lists that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Person record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open.

Advanced Attributes: will launch the User to a selection of additional forms that are unique to a PERSON type. Example: a Missing Person or Found Human Remains Person Form will contain fields designed to record unique information specific to the circumstances of the Person Type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.

Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the PERSON record.

The more basic information or particulars about a PERSON are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Locations Entity

The LOCATIONS RECORD form is used to record details with regard to an address, building, site, room, facility, crime scene, area, region, coordinates, etc.

There are many different Types and Subtypes of LOCATIONS. The list may be customized, however, some of the standard choices include: Home, Billing, Office, Main, Mailing, Shipping, Sub, etc.

The LOCATIONS FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the Location, including the Unit, Building, Street, Municipality, Country, Region, Coordinates, Coordinate Types, etc.

The DESCRIPTOR field can be populated by toggling the box just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Organization record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open:

Advanced Attributes: will launch the User to a selection of additional forms that are unique to an LOCATION type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.

Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the record.

The more basic information or particulars about a LOCATION are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Communications Entity

The COMMUNICATIONS RECORD form is used to record details with regards to an electronic means of communication, such as: phone, cellular, fax, URL, e-mail, Pager, VoIP, Signal, Radio, etc.

There are many different Types and Subtypes of COMMUNICATIONS. The list may be customized.

The COMMUNICATIONS FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the Communication, including the Numeric Values or References, Description, Status, and Types, etc.

The DESCRIPTOR field can be populated by toggling the box just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Communication record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open:

Advanced Attributes: will launch the User to a selection of additional forms that are unique to an COMMUNICATION type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.

Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the record.

The more basic information or particulars about a COMMUNICATION are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Transportation Entity

The TRANSPORTATION RECORD form is used to record details with regards to mode of transportation, such as: car, truck, van, motorcycle, ATV, boat, plane, train, bicycle, snowmobile, etc.

There are many different Types and Subtypes of TRANSPORTATION. The list may be customized.

The TRANSPORTATION FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the Transportation, including the Year, Make, Model, Colour, Style, Class, Identification Numbers, Licensing, etc.

The DESCRIPTOR field can be populated by toggling the box just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Transportation record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open:

Advanced Attributes: will launch the User to a selection of additional forms that are unique to an TRANSPORTATION type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.

Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the record.

The more basic information or particulars about a TRANSPORTATION are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

ePlaces Entity

The e-PLACES RECORD form is used to record details with regards electronic locations, that may not be restricted to a specific geographical influence, such as: websites, domains, computer applications, computer server hosts, network address, etc.

There are many different Types and Subtypes of e-PLACES. The list may be customized.

The e-PLACES FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the e-Places, including the URL, IP, Content, Host, Registrar, Encryption Key, Password etc.

The DESCRIPTOR field can be populated by toggling the box just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the e-Places record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open:

Advanced Attributes: will launch the User to a selection of additional forms that are unique to an e-PLACE type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.

Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the record.

The more basic information or particulars about e-PLACES are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Alerts

The ALERT form is a method of recording administrative alarms, flags, signals, or forewarnings to eSolve Users.

The first LIST that appears in the Information Window Pane of eSolve after a User logs on, is the ALERT LIST. Selecting an ALERT item from the LIST displays the details and contents of the ALERT.

The categories of ALERTS can be customized, but may include standards such as a ?System Admin Diagnostic?, ?Inter-Agency Communication or Policy?, ?General Information or Business Rule Bulletin?, and ?Management Issue?.

Because the ALERT LIST is the first screen on information to appear to every User each time they login, it is the best method of mass communication important updates.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The Email button launched a new e-mail message form.

Objects Entity

The OBJECTS RECORD form is used to record details with regards to any tangible or intangible object (noun) such as: property, items, weapons, valuables, clothing, equipment, supplies, machinery, assets, wealth, debt, commodity, phenomenon etc.

There are many different Types and Subtypes of OBJECTS. The list may be customized.

The OBJECTS FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the Objects, including the Name, Make, Model, Colour, Serial Number, Marks, Condition, Weight, Dimensions, Quantity etc.

The DESCRIPTOR field can be populated by toggling the round buttons just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Objects record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open:

Advanced Attributes: will launch the User to a selection of additional forms that are unique to an OBJECT type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.

Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the record.

The more basic information or particulars about OBJECTS are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Activities Entity

The ACTIVITIES RECORD form is used to record details with regards to any action, movement, event, commission, operation, procedure, process, transaction, litigation,etc.

There are many different Types and Subtypes of ACTIVITIES. The list may be customized.

The ACTIVITIES FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the Activities, including the Title, RE, Amount, Details, Flex Time, Start and End Times etc.

The DESCRIPTOR field can be populated by toggling the round buttons just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Activities record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open:

Advanced Attributes: will launch the User to a selection of additional forms that are unique to an ACTIVITY type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.

Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the record.

The more basic information or particulars about ACTIVITY are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

eRecords Entity

The E-RECORDS form is used to record details and store electronic records such as documents, images, audio, and video.

E-RECORDS may have one or more attached files associated to them. Files may be of any one of the files types defined in the System Administration section of eSolve. Most - if not all - popular file types are supported. In addition, file types TXT, RTF, DOC (Word), XLS (Excel), HTM, HTML and PDF can have the content text automatically extracted and included in the eSolve Search function.

There are many different Types and Subtypes of E-RECORDS The list may be customized.

The E-RECORDS FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the eRecord including the Title, Short Description, Source, media Author and File Location etc.

The DESCRIPTOR field can be populated by toggling the round buttons just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Activities record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open:

Manage Files: presents a list of attached electronic files to the eRecord. Multiple files can be storedand attached to a single eRecord. Clicking on a record in the list attempts to open the file, providing the client computer has the appropriate application for the file type. Placing a "check" beside a file and clicking the "Edit" button allows the user to edit the meta-data about the file - as well as upload a new file in place of the previous one. Users can also Export a file (ie: save a copy to the local client computer), add a new file, or delete an existing one.

Advanced Attributes: will launch the User to a selection of additional forms that are unique to an ACTIVITY type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.

Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the record.

The more basic information or particulars about ACTIVITY are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

eRecords Entity

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Add eRecord File

File are uploaded, stored and "attached" to individual eRecord entities. Enter a Descriptor, Status, and a Date associated to the file. Upon clicking OK, the User is asked to select a file from the client computer (as some network file available to them). Upon choosing "save", the file is uploaded and attached to the eRecord.

Use the "Use File Name" checkbox to have eSolve automatically insert the electronic file name as the Descriptor.

Use the "Extract Text" checkbox to exract the content text from Text, RTF, DOC, XLS, PDF, HTM, and HTML Document types to Full-Text searching in eSolve. Other file types are ignored.

There is a limit of 4GB on the size of any single file. The amount to overall storage space for eRecord files is limited by the size of the host eSolve Server. See your System Administrator for more information.

Only files listed in the eRecord File Types list (found in the System Administration section) will be uploaded. Over 190 default file types are available when eSolve is installed.

Edit eRecord File

File are uploaded, stored and "attached" to individual eRecord entities. Use this form to change an existing eRecord file.

Enter a Descriptor, Status, and a Date associated to the file. Use the "Use File Name" checkbox to have eSolve automatically insert the electronic file name as the Descriptor.

Use the Change button in the File section to upload and OVERWRITE an existing file with a new file.

Use the "Extract Text" checkbox to exract the content text from Text, RTF, DOC, XLS, PDF, HTM, and HTML Document types to Full-Text searching in eSolve. Other file types are ignored.

There is a limit of 4GB on the size of any single file. The amount to overall storage space for eRecord files is limited by the size of the host eSolve Server. See your System Administrator for more information.

Only files listed in the eRecord File Types list (found in the System Administration section) will be uploaded. Over 190 default file types are available when eSolve is installed.

eRecord File Types

The e-RECORD FILE TYPE form is used to identity all record file extensions and potentially unique file types that will be recognized by eSolve. The FILE TYPE value represents the extension of the file name (ie: mydocument.PDF - "PDF" being the file type value) and is used by eSolve to identify the source application that is required to open this file. The MIME Type (Multi-purpose Internet Mail Extensions) represents an industry-standard description for the file type.

When a USER creates a new e-RECORD, the electronic file is copied and embedded into the eSolve database. Any file types that are not included in the e-RECORD FILE TYPE LIST will not be saved.

e-RECORDS can be viewed is the file type is included in this list, and if the application software exists on the USER'S computer.

Tips

The TIP form may be used to capture rapid or voluminous entity information and details from a variety of sources.

The categories and sub-categories can be customized, but may include standards such as Telephone Complaint, Anonymous Source, CrimeStoppers, Neighbourhood Door-to-Door Canvas, Public Appeal ? News Release, and Computer or Internet Records Checks.

The form has been streamlined so that anyone - even non-traditional eSolve users - could complete this form with little to no formal application training.

The entity information, such as Organization, Name, Address, and Telephone recorded in the TIP form are NOT automatically linked to each other. For example, if a PERSONS name is entered into the TIP form, the name will not appear in the PERSONS LIST. An additional PERSON record must be created afterwards.

After the relevancy of the TIP has been evaluated / assessed, proper information culling and data entry should be performed.

The STATUS dropdown selection field can be used to assist with the evaluation / assessment process of the tip information.

Once a TIP is created, an ASSIGNMENT can be initiated and the TIP can be linked to a specific task associated to the ASSIGNMENT. This can all ?spawn? from the TIP form.

Click on the Lined Assignment Dropdown menu.

Choose an existing ASSIGNMENT form the LIST or select NEW.

Once you choose NEW, the TIP will be automatically linked to the new ASSIGNMENT and a header for the TIP will appear in the Title field.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Entity Summary

The SUMMARY form for the entity record is a free text area where the USER can enter information that summarizes the entity.

The text should include the date the description was received or recorded.

Summary information from multiple sources may be contained within this same text field.

System Time Out

The SYSTEM TIME OUT is an added security feature of eSolve. Specifying a value in MINUTES will result in the application automatically logging a user out after the specified time period - if the application is inactive.

Example: A USER walks away from eSolve while it is running on their computer. After 10 minutes of inactivity, the application automatically logs the user out. The USER will need to re-login when they return to their workstation.

Mail Server Address

The OUTGOING MAIL SERVER address identifies the network or local computer e-mail system so that the E-MAIL features in eSolve functions correctly. eSolve will attempt to forward eSolve-generated mail to this OUTGOING mail host. There is no error checking; if the mail host is not available the mail send will fail. Thus, it is recommended that the connection be tested thoroughly.

eSolve Administrators will have to set this value in conjunction with the host Agency's IT Support personnel. Examples of a correct values would be:

mail.myagency.com

smtp.telus.net

NOTE: IT Administrators: depending on your mail-host configuration, forwarding from properly qualified senders may be required; all orginators of eSolve mail messages are identified by their e-mail address from their eSolve user account..

The INCOMING MAIL SERVER is set to retrieve incoming emails. This mailserver must be capable of accepting POP3 connections. Valid POP3 user credentials must be entered into these fields. The host Agency's IT Professionals will be responsible for setting the POP email account on the mailserver.

The EMAIL SCHEDULER SETTINGS .
If the Email Scheduler is not enabled, then email account specified in the INCOMING MAIL SETTINGS will not be checked at all. The EMAIL SCHEDULER INTERVAL represents the number of minutes in between email checks.

The EMAIL NOTIFCATION section specifies whether email responses are sent to users who send emails to eSolve.

The EMAIL LOGGING section specifies whether logging occurs when users send emails to eSolve.

Quick-Form: Standard Person Entry

The QUICK-FORM: PERSONS - LOCATIONS - COMMUNICATIONS allows Users to enter data from 3 entities on one form; PERSONS, LOCATIONS, and COMMUNICATIONS. Thus, standard "tombstone and contact " data regarding a person can be entered and LINKED in a single operation. The fields on the QUICK-FORM are a subset of those found on the standard entity forms. PERSONS is the ROOT entity to which the others are linked.

Users can also choose the Reason Code that links the entities together; the default Reason Code for that link type is automatically entered in the selection list.

Each Entity on the form contains a "Checkmark" and "X" icon buttons. These buttons are used to:

Checkmark: Tests the presence of another record that is similar to the data entered. Thus, a User can fill in selected data and press the Checkmark. eSolve checks the appropriate entity records and produces a selection list of close matches. The User can then select an existing record - in which case the existing entity data OVERWRITES the entered data, or they can cancel and continue with data entry. The ID field beside the Checkmark displays the unique entity ID number if an existing record is selected; otherwise it displays the word "NEW" to indicate a new entity will be created when the QUICK-FORM is saved. If an existing record is chosen, all data fields are disabled; existing data records cannot be edited in a QuickForm, only linked to.

X: Clears the appropriate entity form ready for new data entry.

The checkbox beside the Location and Communication title indicates if an entity of this type will be saved. For example, unchecking the Locations box means that a Locations entity is NOT saved; data in this portion of the form will be cleared and ignored.

Once saved, Entity and Link records are identical to those created in the standard "manual" method; further editing and linking is at the descretion of the User.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Note: The user must have a DEFAULT PROJECT selected and enabled for QUICK-FORMs to be available for selection in the QUICK-FORM list.

Report Disclaimer

The REPORT DISCLAIMER form permits any user (subject to FUNCTION PERMISSIONS) to identify a text message that will appear on the footer of every REPORT.

An example might be:

This report is subject to restricted distribution governed by the Agency's 3rd Party rules. No distribution is permitted with the express consent of the authoring Agency: Trinus Technologies Inc.

NOTE: The report disclaimer is not limited to any specific project. This disclaimer will appear on ALL reports generated by eSolve.

Search

eSolve employs a sophisticated search mechanism that allows searching of entity and investigation record text fields for matching values. The search routines are intrinsic to the database engine (SQL) and require little - if any - maintenance. The search form allows users to select a variety of options to help narrow the search results.

The search form is divided into two halves; users enter the Search For value and select a variety of search options before initiating the search. Results are displayed in list in the lower section. To perform a search:

Enter one or more words, or a phrase in the Search For field. How text is entered determines - along with the search type - how the results will be returned. Search types are explained below.

Select one-or more Search Entities by placing a check beside one or more entity names in the Available list and pressing the RIGHT ARROWS button. Use the "All and Clear" buttons to select either all or none of the entities. Similarly, use the same method to remove entities from the Selected list using the LEFT ARROWS button. Of course, searching none of the entities will not return any search results.

Press the Search hyperlink to start a search. How long a search takes depends on the amount of data to search, the type of search, and the complexity of the search request.

Use the Reset hyperlink to clear all search results and start over.

Search results are viewed in the lower section. A list is returned of records that match the search criteria sorted by "score" highest to lowest. The entity type, descriptor, project, type, subtype, and status are also displayed. Like any other eSolve list, the results and be sorted and filtered. Using the Results by Entity and Results by Project tabs, the results list can be grouped for easier viewing.

NOTE: The search phrase words may NOT display in the results list - as the words may be contained in other fields in the record.

Result records can be viewed by clicking the appropriate record line in the list, which opens a read-only form that displays the search fields for the entity, with the search phrase words highlighted in BOLD. Clicking on the View Entity button will display the complete entity record for further processing.

NOTE: Search respects eSolve record security; search results will ALWAYS return ALL available records in the list, but the user must have sufficient READ permission to view the record in the display form.

Scores are relative percentages of the match relevance; the record with the highest relevance in any given search always returns a score of "100". Thus, scoring numbers cannot be directly compared from one search to the next. Scoring is computed based on the number of words in the record, the number of unique words in that record, the total number of words in the collection, and the number of documents (records) that contain a particular word. Scores calculate across all entities included in the search.

Search Types

When the eSolve host database is MySQL, there are three search types that are selected using the radio button beside each type (The SQL Server host database does not support multiple search types and these options will be disabled - searches will use a standard match using wildcard characters "* and ?"):

Boolean: A Boolean search interprets the search phrase using the rules of a special search language. The phrase contains the words to search for. It can also contain operators that specify requirements such that a word must be present or absent in matching rows, or that it should be weighted higher or lower than usual. Common words such as ?some? or ?then? are stopwords and do not match if present in the search string. See Search Modifiers for a list of operators that can be used in a Boolean search.

Search

Natural Language: A natural language search interprets the search as a phrase in natural human language (a phrase in free text). There are no special operators. The stopword list applies. In addition, words that are present in more than 50% of the records are considered common and do not match.Boolean searches are natural language searches if no modifier is given

Recursive Natural Language: A recursive natural language search is a modification of a natural language search. The search phrase is used to perform a natural language search. Then words from the most relevant rows returned by the search are added to the search phrase and the search is done again. The search returns the records from the second search.

Search Modifiers

Search modifiers are used with the Boolean search type to modify the way a search is performed. Search modifiers are ignored in the other two search types Search modifiers are applied to one or more words in the search phrase and can produce dramatically different results when used in various combinations.

+ A leading plus sign indicates that this word must be present in each row that is returned.

- A leading minus sign indicates that this word must not be present in any of the rows that are returned. Note: The - operator acts only to exclude rows that are otherwise matched by other search terms. Thus, a Boolean search that contains only terms preceded by - returns an empty result. It does not return ?all rows except those containing any of the excluded terms.?

(no operator) By default (when neither + nor - is specified) the word is optional, but the rows that contain it are rated higher. This mimics the behavior of natural language search

[Right & Left Angle Brackets] These two operators are used to change a word's contribution to the relevance value that is assigned to a row. The right angle bracket operator increases the contribution and the left angle bracket operator decreases it. See the example following this list.

( ) Parentheses group words into sub-expressions. Parenthesized groups can be nested.

~ A leading tilde acts as a negation operator, causing the word's contribution to the row's relevance to be negative. This is useful for marking ?noise? words. A row containing such a word is rated lower than others, but is not excluded altogether, as it would be with the - operator.

* The asterisk serves as the truncation (or wildcard) operator. Unlike the other operators, it should be appended to the word to be affected. Words match if they begin with the word preceding the * operator. If a stopword or too-short word is specified with the truncation operator, it will not be stripped from a Boolean search. For example, a search for '+word +stopword*' will likely return fewer rows than a search for '+word +stopword' because the former search remains as is and requires stopword* to be present in a document. The latter search is transformed to +word.

" A phrase that is enclosed within double quote (?"?) characters matches only rows that contain the phrase literally, as it was typed. The full-text engine splits the phrase into words, performs a search in the FULLTEXT index for the words. Prior to MySQL 5.0.3, the engine then performed a substring search for the phrase in the records that were found, so the match must include non-word characters in the phrase. Non-word characters need not be matched exactly: Phrase searching requires only that matches contain exactly the same words as the phrase and in the same order. For example, "test phrase" matches "test, phrase".

Search Tips

eSolve search ignores words that are shorter than 3 characters in length.

Search

eSolve employs a stopword list, a list of common words that will not add value to the returned results and thus are ignored. A list of stopwords is available in the eSolve Community (www.esolve.ca)

Recursive Natural Language searches can return large volumes of records as the search is actually run twice. Thus, this type of search works best if you start with a very specific and short search phrase (ie: Rocky Brown)

Edit Entity Icons

Entity icons are used by eSolve when entities are diplayed on relational (link) charts for analysis, reporting. Different entity types and subtypes are sometimes better represented by different icons (ie: Female Person: Female Portrait icon, Male Person: Male Portrait icon)

NOTE: Production of link charts is a future internal feature of eSolve. External tools such as those produced by Visual Analytics (www.visualanalytics.com) and i2 Inc. (www.i2inc.com) facilitate the production and analysis of linkages through link charts, time lines, and data mining utilities.

To edit an icon entity type:

Select the Entity Type from the available types.

Enter a common name that the icon will be known by (ie: Generic Male)

Click OK to save the new settings

To change the stored icon image, click the Change button. eSolve will then ask you to select an icon image file from the local computer. Select the image and click Open to save the new image.

NOTE: The image file format MUST be bitmap (BMP) and is recommend to be no larger than 40 x 40 pixels (32 x 32 is the recommended standard). Image types other than bitmap are not saved.

Optionally, you may select an image to be the Default for that entity type by checking the Default box. Setting a default entity icon for each entity type allows eSolve to automatically store the default icon type when a new entity is created, thus saving time and insuring that all entities have an icon. When a different icon is selected as the default, any previous default choice for that entity type is un-checked.

Use the Locked checkbox to lock a record from further editing, regardless of a user's permissions.

Use the Lightning Bolt icon to access the security settings for this icon type.

Add Entity Icons

Entity icons are used by eSolve when entities are diplayed on relational (link) charts for analysis, reporting. Different entity types and subtypes are sometimes better represented by different icons (ie: Female Person: Female Portrait icon, Male Person: Male Portrait icon)

NOTE: Production of link charts is a future internal feature of eSolve. External tools such as those produced by Visual Analytics (www.visualanalytics.com) and i2 Inc. (www.i2inc.com) facilitate the production and analysis of linkages through link charts, time lines, and data mining utilities.

To add an icon to an entity type:

Select the Entity Type from the available types.

Enter a common name that the icon will be known by (ie: Generic Male)

Click OK. eSolve will then ask you to select an icon image file from the local computer. Select the image and click OK to continue.

The image is stored in eSolve and the Entity Icon is created.

NOTE: The image file format MUST be bitmap (BMP) and is recommend to be no larger than 40 x 40 pixels (32 x 32 is the recommended standard). Image types other than bitmap are not saved.

Optionally, you may select an image to be the Default for that entity type by checking the Default box. Setting a default entity icon for each entity type allows eSolve to automatically store the default icon type when a new entity is created, thus saving time and insuring that all entities have an icon. When a different icon is selected as the default, any previous default choice for that entity type is un-checked.

Use the Locked checkbox to lock a record from further editing, regardless of a user's permissions.

Use the Lightning Bolt icon to access the security settings for this icon type.

Concepts

CONCEPTS are entities that capture ideas or loosely associated facts that may - over time - coalesce into an activity, event or other entity. Concept examples might include: World Hunger, Domestic Violence, Asian organized Crime, Amateur Sport, or Human Powered Flight.

CONCEPTS allow you to record fielded data such as Title, Originator, Influencer, Coalescing Force and scope. Like all other entities, you can also record Description, History, Notes, Supervisor, Source, and Summary data.

The CONCEPT FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the Organization, including the Name, Identification Numbers, Purpose, Size, Financial Worth, Inception Date, Status, Scope, and Level of Operations, etc.

The DESCRIPTOR field can be populated by toggling the round button just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Organization record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open:

Advanced Attributes: will launch the User to a selection of additional forms that are unique to an ORGANIZATION type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.
Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the record.

The more basic information or particulars about a CONCEPT are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

eRecord File Content

File content is extracted automatically during the file upload process if the file type is:

TXT

RTF (Rich Text Format)

DOC (Word)

XLS (Excel Spreadsheet)

HTM, HTML

PDF (NOTE: if the PDF document is a scanned image any text in the PDF will be seen as part of the image and therefore not extracted as text)

The "Extract Content" checkbox also must be checked.

eSolve makes its best attempt to extract text words and phrases. There are some limitations:

XLS: Spreahsheet cells with numbers

Project Child Record Charts

This chart shows the number of child records created as a result of this project, broken down by entity type. If an entity type is missing, then no child records of that entity type have been created for this project. You can view a list of the records by:

Clicking the hyperlinked name of the project in the upper left-hand corner of the window. This displays a list of ALL child records grouped by the entity type.

Clicking an entity label in the chart. This displays a list of the child records for that entity type.

NOTE: The Parent-Child relationship is an implied relationship. Unlike links (which are manually and deliberately created), parent-child relationships are a reflection of the database design. For example, all entities are child-records of a Project. Users cannot change the hierarchy of parent-child relationships.

Location Maps

The eSolve Mapping feature uses Yahoo Maps to display eSolve Locations on maps from either Address or latitude and Longitude coordinates. The Map display has the ability to show Satellite maps, traditional graphic maps, or a hybrid combination. In addition, the map has ZOOM and PAN controls. eSolve Locations are displayed as a RED Flag in the center of the map, the Location ID number displays in the flag.

Placing the mouse over the Flag displays the eSolve Location descriptor

Clicking the Flag displays the eSolve Location record data

Clicking elsewhere in the map displays a form with the selected Latitude and Longitude

Clicking and dragging the map PANS the map to a different location

Map point data can be saved to the eSolve Location record by entering the:

Address: Building, Street, Municipality, State/Province, and Postal/Zip Code data (separated by commas) for most locations within North America display correctly

Latitude: Decimal values entered to up to 6 significant digits. Postive values for the Northern hemisphere and negative values for the Southern hemisphere.

Longitude: Decimal values entered to up to 6 significant digits. Postive values for the Eastern hemisphere and negative values for the Western hemisphere.

Zoom: Lower numbers for Zoom-in, higher numbers for Zoom-out. Auto allows Yahoo maps to auto-select an appropriate zoom level.

Auto-load: allows the map to automatically display when the map form is shown. This may not be desirable if the Internet connection is slow or restricted.

Multi-point Center: when multiple Locations are displayed on the same map (by selecting one or more records from a Location list), this address can be used as the Center-point of the map display. The user will be asked to select a map Center-point before a multi-point map is displayed. The selected Center-point's Zoom setting is also used.

Technical Note: The eSolve map feature uses a live Internet connection to Yahoo Map's servers to download and display map data. Therefore, the client's WORKSTATION must have a usable Internet connection and DNS connections to Yahoo Map servers must be available through the client's firewall.

NOTE: an Internet connection to the eSolve server (if separate from the client's WORKSTATION) is NOT required.

Create a Linked Entity Image

The form allows you to quickly create a NEW image linked to the target entity. Fill in the form as required and press OK. You will be prompted for an image file. Once selected:

A NEW eRecord is created using the values entered

A NEW eRecord file is created that stores the image file

A NEW link is created between the newly-created eRecord and the target entity

Finally, the image is marked as the Default for the target entity

Note: New records are created for JPG, GIF and PNG image files ONLY. All other file types will abort the process.

Note: Security settings for the NEW eRecord and link will be derived from the user's Default project (if Enabled) or from the project selected just before the New Linked Image File form is opened.

eRecord QuickLink

eRecordQuicklinks are a convenient way to add a linked eRecord and uploaded file in a single step. Input the following MANDATORY values:

Reason Code: The reason the eRecord is linked this entity
Descriptor: The Descriptor of the eRecord
Date: The eRecord Date
Type: The eRecord Type
Subtype: The eRecord Subtype
Status: The eRecord Status
Author: The eRecord Author. This value defaults to the current user.

Optionally, check the Use File Name box to have eSolve substitute the file name for the Descriptor. For example, if your upload file name is "My_Spreadsheet.xls", this name will be used in the Descriptor of the eRecord.

Text content can be extracted from an uploaded eRecord if it is one of the following types:

PDF: Adobe Portable Document format (if it has a text layer)
DOC: Microsoft Word format (up to version 2003)
RTF: Rich Text format
XLS: Microsoft Spreasheet format (up to version 2003)
HMTL: Web-based hypertext markup document format
TXT: Native text files

To extract text, check the Extract Text box. Once all options are complete, click OK. You will be prompted for the name and location of the file to upload. eSolve performs the text extraction in a thread, thus the content of the file may not be available until somtime after the upload is complete if the document is lengthy or complex. This is especially true of large spreadsheet files.

Occurrences

Occurrences are a convenient way to conduct smaller investigations that may be concluded with a minimum of effort. Occurrences combine:

A single Project
A single Activity
A single Assignment
A single Response
A single Location
And multiple linked Persons, Organizations, Transportation, Objects and eRecords

... in an easy-to-use form. The links created in the Occurrence form are tied to a central Activity. Other differences from traditional eSolve data entry processes of other entities and investigation forms are:

The Occurrence field is the Activity Details
The Relevance field is the Project Scope
The Author is the Project "Assigned By", Assignment "Assigned By", and the "Activity Author"
The Dispatch is both Project and Assignment "Assigned To"

Adding a new linked entity is streamlined by the use of several QuickForms built into the Occurrence system. Each entity links the primary ROOT entity to the Occurrence Activity. In addition, using the built-in QuickForm also allows one or more links to be built between the ROOT entity to other entities. For example:

Choosing to add a new PERSON to the Occurrence brings up a form that allows the user to add a new PERSON, was well as a new LOCATION and COMMUNICATION that links to the PERSON at the same time. Thus, it is possible to add the traditional Name, Address and Phone Number to the Occurrence from a single form.

Entity QuickForms are built-in for:

PERSONS: Locations and Communications
ORGANIZATIONS: Persons, Locations, and Communications
TRANSPORTATION: Organizations and Persons
OBJECTS: Organizations and Persons
ERECORDS eRecord QuickLink form to streamline file uploads

Occurrences can record all of the Conclusion, Supervisor and Manager comments normally associated with a Project, as well as the traditional Project Status Flags. Occurrences can be CONCLUDED from this form.

A special capability on the Occurrence form allows the Occurrence to be Escalated to a Project. This converts the Occurrence to a fully-capable Project that allows investigators to continue the investigation work with all of the traditional eSolve tools; none of the Occurrence data is lost.

To escalate an Occurrence, choose the Escalate to Project tree node, and complete the form by selecting the appropriate Project and Assignment metric values.

NOTE: Once an Occurrence has been escalated to a Project, it CANNOT revert back to an Occurrence.

OCCURRENCE LOCATIONS RECORD

The LOCATIONS RECORD form is used to record details with regard to an address, building, site, room, facility, crime scene, area, region, coordinates, etc.

There are many different Types and Subtypes of LOCATIONS. The list may be customized, however, some of the standard choices include: Home, Billing, Office, Main, Mailing, Shipping, Sub, etc.

The LOCATIONS FORM LAYOUT is configured as follows:

Information Window Pane (Top Right). This contains the key particulars about the Location, including the Unit, Building, Street, Municipality, Country, Region, Coordinates, Coordinate Types, etc.

The DESCRIPTOR field can be populated by toggling the box just below the field.

Entity List Window Pane (Bottom Right). This contains any list of entities record information as selected by the User from the Navigation Tree on the left. The User can select to view an Entity record, or linkage record from any of the list that appears in this view.

Navigation Tree (Left). This contains the ?Table of Contents? of the information records available within the Organization record. When the User selects an item on the Navigation Tree, the List of available entity records appear on the Entity List Window Pane. In some instances, when the User selects and item from the Navigation Tree, a new form will open:

Advanced Attributes: will launch the User to a selection of additional forms that are unique to an LOCATION type.

Custom Attributes: will launch the User to a selection of additional forms specific to the eSolve Agency-Owner.

Description: a free text area.

Notes: will launch the User to a free text area.

Source Grading: designed for evaluation, assessment, and analysis of the record.

Supervisor-Manager Comments: permits supervisor or other Project Managers the ability to record comments and set Flags specific to the record.

The more basic information or particulars about a LOCATION are contained in the Information Window.

The APPLY button saves any changes made to the open form without closing the form.

The OK button saves any changes made to the open form, and also closes the form.

The OK & NEW button saves any changes made to the open form, and refreshes the form for new data entry.

Occurrence Templates

Occurrence Templates are used to quickly create a new OCCURRENCE based on values pre-defined within a template. Much like a Word Document template, common values are "pasted" into a new Occurrence to pre-populate critical fields. This saves time and promotes consistency.

First: Fill in the template values as you would any other occurrence - but DO NOT FURTHER USE THE OCCURENCE IF YOU WISH TO USE IT AS A TEMPLATE. Mandatory fields are in RED. See the Occurrence "Help" form for further information about the function of the Project fields.

Next: TO CREATE A NEW OCCURRENCE FROM A TEMPLATE: choose "Add New Occurrence from Template" option from the Projects tree and select the appropriate template.

An unlimited number of templates can be created and stored in eSolve.

CONCLUDE SUMMARIZE OCCURRENCE

The CONCLUDE SUMMARIZE form allows for the insertion of comments or text from the User assigned to the Project, a Supervisor, and a Manager of the Project.

There are also five (5) categories of FLAGS that include multiple dropdown lists. These include:

Analysis: reference to the evaluation and verification.

Disclosure: reference to judicial preparation.

Reporting: reference to dissemination.

Audit: reference to data entry.

Export: reference to data migration.

The CONCLUDED checkbox allows the Project to be flagged as Concluded - regardless of any other flags or their status. Once Concluded, the Project field values cannot be edited; the OK and Apply buttons are hidden and the Project is "watermarked" Concluded.

In addition, check one or more of the "Conclude Associated Assignments", "Conclude Associated Responses", or "Conclude Associated TIPs" checkboxes to automatically conclude associated Responses or TIPs. Conclude permissions are checked against each record and ONLY those Assignments, Responses or TIPs where the user's Conclude permission meets or exceeds the record's Conclude permission will be concluded. These options are disabled if the CONCLUDED checkbox has not been selected.

To "unconclude" a Project, the user must first alter the WRITE permissions on the Project - concluding the Project sets this value to "100" - beyond the security value of any user. The value can be set to anything equal to or lower than the user's WRITE permissions. Once reset, the Project OK and Apply buttons will be available and the Concluded checkbox can be unchecked and the record saved.

Mail Auto Notification Settings

eSolve has the ability to auto-notify by e-mail selected users when an Project, Assignment, or Response is created or updated. Each Project, Assignment, or Response carries individual settings that can be altered by navigating to the Send E-mail - E-mail Auto Notification tree node. The Settings in the System Administration govern the default settings for new Projects, Assignments, and Responses.

Place a check mark in the appropriate box to set the global Auto Notification settings. Each new Project, Assignment, and Response will automatically inherit these settings.

Project Auto Notification Settings

eSolve has the ability to auto-notify by e-mail selected users when a Project is created or updated. Each Project carries individual settings that can be altered by navigating to the Project's Send E-mail - E-mail Auto Notification tree node. The Settings in the System Administration govern the default settings for new Projects.

Place a check mark in the appropriate box to set the Project Auto Notification settings. The notification contains the same text as if the user had sent a E-mail message manually from eSolve.

Assignment Auto Notification Settings

eSolve has the ability to auto-notify by e-mail selected users when an Assignment is created or updated. Each Assignment carries individual settings that can be altered by navigating to the Assignment's Send E-mail - E-mail Auto Notification tree node. The Settings in the System Administration govern the default settings for new Assignments.

Place a check mark in the appropriate box to set the Assignment Auto Notification settings. The notification contains the same text as if the user had sent a E-mail message manually from eSolve.

Responses Auto Notification Settings

eSolve has the ability to auto-notify by e-mail selected users when a Response is created or updated. Each Response carries individual settings that can be altered by navigating to the Response's Send E-mail - E-mail Auto Notification tree node. The Settings in the System Administration govern the default settings for new Responses.

Place a check mark in the appropriate box to set the Response Auto Notification settings. The notification contains the same text as if the user had sent a E-mail message manually from eSolve.

Audit Log Viewer

eSolve records can be viewed and compared in the Audit Log viewer. All audit logs store the content of the record in XML format. The viewer converts the XML into [FIELD] : [VALUE] pairs, each field on a new line. Field names may not correspond directly to form labels for any given entity or record. Thus, the audit log viewer is a tool best used by those familiar with database techniques (ie: a DBA in your organization).

The top portion of the viewer contains a list of all versions of a particular record within eSolve. Clicking on a single line from the list will display the field and contents of the entire record in the lower viewer. Choosing any two records from the list by using checkmarks and clicking the "Compare" button will display the differences between the two versions of the same record. Thus, it is possible to compare any two versions of the same record to discover what has changed.

Audit Log Settings

eSolve can record system access events to a separate Audit Log that can be viewed in the Audit Log List and Viewer. Events can be logged for record Create, Write, and Delete events, as well as track Incoming,Outgoing and Notification e-mails by checking the appropriate boxes.

The Email Log tracking system is also used to view sent emails from individual entity records. Thus, it is recommended that these options be checked if the Email facilities of eSolve are used extensively.

The Log Archive Directory specifies the eSolve SERVER folder where log files will be stored. By default, this value is "C:\log_archive". Enter any valid server folder; a trailing backslash is not required.

Escalate Occurrence to Project

Occurrences can be escalated to full Project status in eSolve without loosing any data or related work. Once escalated, an Occurrence cannot be de-escalated. Security permissions for the Occurrence flow through to the Project. Concluded Occurrences will be automatically UNCONCLUDED providing the user as sufficient Conclude rights when compared to the Occurrence Conclude permissions.

Once escalated, the Occurrence becomes:
One Project
One Child Activity
One Child Assignment
One Child Response
As many linked entities as were originally created linked to the ACTIVITY.

Select an appropriate Category, Subcategory and Status for the Project, as well as corresponding Type, Subtype, and Status values for the Assignment. The Activity automatically inherits Type, Subtype and Status values from the Occurrence. These values can be altered with the Project or Assignment once the escalation is complete.

LDAP Administration

This screen contains the settings for connecting to an LDAP server for authentication. Regardless of whether a user correctly enters the LDAP username and password, that user must exist first in eSolve in order to enter eSolve.

When a user who is in LDAP correctly logs into eSolve, that users password in eSolve will be updated. So if LDAP is ever disabled, the eSolve password will be the password used when the user last successfully logged into eSolve via LDAP authentication.

The following is a description of each of the settings:

-Enable LDAP: When this option is selected, eSolve will authenticate user logins against the LDAP server.

-LDAP only: When this option is selected, eSolve will only authenticate user logins against the LDAP server and not against not eSolve database. If LDAP only is not selected, eSolve first checks if the user exists on the LDAP server and authenticates against the LDAP server if the user exists in LDAP. If the user does not exist in LDAP, then eSolve authenticates against the eSolve database. This allows for 2 different sets of users to be administered in LDAP and in eSolve.

-LDAP Server URL: The location of the LDAP server.

-LDAP Server Port: The port number used by the LDAP Server.

-Principal Username: The username of the princial user in LDAP that will be used to authenticate other users.

-Principal User Password: The password of the princial user in LDAP.

-Principal User Suffix: The location within the LDAP structure where princial user exists.

-Top DN: The root location in the LDAP tree where users will be searched.

-Unique Field: The name of the field used as a unique identifier for users.

-eSolve Admin User: The Administration User in eSolve. This user will be authenticated through eSolv eonly and will not authenticate through LDAP. Therefore, this user's password will not update with the LDAP password.

Incoming Mail Settings

There are two types of connection protocols. IMAP and POP. Both will scan the imbox of the user account. With IMAP there is the option of having secure connections using SSL (Secure Sockets Layer).

Here are the individual settings:

-Protocol is either POP or IMAP.

-Username is the username of the account that email is being sent to.

-Password is the password for the email account that email is being sent to.

-Port is the port number to connect to the mailserver.

-Mailserver is the URL of the mailserver machine.

Using SSL (IMAP only)

-SSL determines whether the connection to the mailserver will be secure or not.

-The Keystore path and keystore password represent the location of the java keystore and its password. These are required for secure connections. Before using SSL you must import a certificate into the java keystore.

-Email notification determines whether the sender of the email will receive a response from eSolve notifying the status of the email message. This is a usefull feature to determine if the email was properly sent to eSolve or if there are issues with it. For example, if the email is incomplete, and is missing information, then if a response can be send back to the orginial sender notifying what information is missing if the 'Email Response for Incomplete' checkbox is checked off. LIkewise, if the email sender is not authorized to send email to eSolve, then he will be notified if the 'Email Response for Unauthorize' checkbox is checked off.

-The Check Email Now button can be used to test whether you can connect to the mailbox. It will download messages if it can connect and delete them from the mailbox. You may need to save the values by pressing OK first to check for email.

Outgoing Mailserver Settings

eSolve uses SMTP for autgoing mailsettings. By filling in the required fields, esolve will send emails in plaintext SMTP. If you add a password and check the SSL button, then eSolve will use authentication and create a secure connection.

Mail Scheduler Settings

The scheduler is used to check for emails coming into eSolve.

-Enable Scheduler: When checked, the scheduler will be turned on. Email will be checked on a scheduler set by the Scheduler Interval.

-Scheduler Interval: The number of minute in between checking for email. This number can be between 1 and 60.

Set GLOBAL date Display Format

eSolve can accommodate several regional date formats. Choose the appropriate format from the list and click OK.

Date Format settings are GLOBAL and affect all display of date formats in eSolve lists and forms for all eSolve users. Date Display formats do not affect the format used to store the data value in the database (yyyy.mm.dd), but simply the format displayed on the screen. Currently, multi-format dates are NOT supported on PDF reports generated from eSolve; they always display in the native format (yyyy.mm.dd).

Date format settings will not take effect until ALL users log out of eSolve and restart their browsers. It is not necessary to restart the eSolve server or individual client computers.

Audit Log Archive

The Audit Log Archive function facilitates archiving - and optionally purging - of records from the eSolve Audit Log. Archive files are writtem in XML format to a Log Archive Directory on the eSolve SERVER as specified in the Log Settings of the System Administration of eSolve.

Log File names take the format "ESOLVE_LOG_[START DATE-TIME]_[END DATE-TIME].xml". In the case of a duplicate file name, a numeric identifier wil be appended to the name.

Archive options allow for records to be selected based on four criteria:

Date Range - The date the record was written to the log file. Note: this may be NOT be the commonly known file date.
Action Type - The type of record update action; either Create, Write or Delete.
Action Author - The eSolve user who performed the action. Note: this may not be related to other users comonly identified on an Entity form (ie: Assigned To, or Assigned By).
Entity - The entity record.

One or more selections can be made by holding down the CTRL key and clicking on the appropriate selection. Click the "Use All" checkbox to automatically select all entries in the list box.

If the Purge Log Entries checkbox is selected, records are deleted from the Log file at the same time they are written to the archive XML file. Once deleted, Audit Log records cannot be recovered.

Email Log Archive

The Email Log Archive function facilitates archiving - and optionally purging - of records from the eSolve Email Log. Archive files are writtem in XML format to a Log Archive Directory on the eSolve SERVER as specified in the Log Settings of the System Administration of eSolve.

Email Log File names take the format "ESOLVE_EMAIL_LOG_[START DATE-TIME]_[END DATE-TIME].xml". In the case of a duplicate file name, a numeric identifier wil be appended to the name.

Archive options allow records to be selected based on four criteria:

Date Range - The date the record was written to the log file. Note: this may be NOT be the commonly known file date.
Email Type - The type of Email, Incoming or Outgoing
Email Author - The eSolve user who initiated the Email Note: this may not be related to other users comonly identified in the Email, such as To, From, or CC.
Originating Entity - The entity record related to the Email.

One or more selections can be made by holding down the CTRL key and clicking on the appropriate selection. Click the "Use All" checkbox to automatically select all entries in the list box.

If the Purge Log Entries checkbox is selected, records are deleted from the Email Log file at the same time they are written to the archive XML file. Once deleted, Email Log records cannot be recovered.

NOTE: PURGING EMAIL LOG RECORDS COULD AFFECT THE ABILITY TO VIEW E-MAIL RECORDS AS THE EMAIL LOG FILE IS THE ONLY REPOSITORY OF SOME EMAIL RECORDS (OUTGOING, AND INCOMING WHERE AN ERECORD IS NOT CREATED AUTOMATICALLY).

QuickForm 1004

The ORGANIZATIONS - Persons - Locations - Communications - ePlaces QuickForm is used to quickly create and manage multiple links to a ROOT Organization. To use the form:

Select an Author and Date value (mandatory)
NOTE: If the form is being used to LINK the Organization to an Investigation process (Project, Assignment, or Response) using the Organizations QuickLink function, choose an appropriate Reason from the drop-down list.
Enter an Organization Name - and select Type, Subtype, and Status values (mandatory). By default, the Descriptor is built from the Organization Name. Click the Manual radio button to enter the Descriptor value manually.
Optionally, click the Checkmark to inspect a list of possible duplicate Organizations. If a matching Organization is selected, the selected Organization data will replace the Organization data on the QuickForm and the existing Organization's links will be displayed.
NOTE: a NEW Organization will not be created if an existing Organization is selected from the list
If a NEW Organization is to be created, click the APPLY button. The new Organization is created and the Linked Lists are activated.
Create one or more linked entities by clicking the NEW button and filling in the appropriate forms.
Edit an existing Link by selecting it from the list. The entity and link form is displayed.
Delete one or more links to entities by selecting them with the row checkmarks and clicking Delete. You can the checkmark selections with the All and Clear buttons.
NOTE: ONLY links to existing entities are deleted, not the entity records themselves.

Lists can be sorted and filtered like any standard eSolve list. See the General eSolve help for more information.

Organizations to Persons Link

The Organizations to Persons QuickForm is designed to create a link between the ROOT Organization and a Person entity. To use the form:

If Creatng a NEW Link:
Select an Organizations to Persons Link Reason Code from the drop-down list (mandatory)
Select an Author (mandatory)
Select a Start Date for the Link
Enter the known information about the Person. The Descriptor, Type, Subtype and Status are mandatory
Optionally, use the checkmark to display a list of possible duplicate Person entities. If you select a Person entity from the list, it will REPLACE the entered Person data and the Link will be created to the selected Person entity.
NOTE: Existing Person entity data cannot be edited in this form
Click OK to create the Link and return to the calling QuickForm.
Click OK and New to create the Link and clear the form ready for the NEW Link

If Editing an EXISTING Link:
The existing Link data is displayed on the form. All link values can be altered to edit the Link values.
A NEW Person entity can be created by clicking the X button.
A different Person entity can be chosen by using the checkmark button to display the Persons list.
Follow the same procedures for creating a new Link.

NOTE: When the Field Status is Partially Locked, the ability to edit the record is restricted by removing the OK and OK and New buttons from the form. Records are Partially Locked by setting the appropriate flag in the Custom Attributes of the entity - or under program control during a data import. This flag cannot be changed by the user.

Organizations to Locations Link

The Organizations to Locations QuickForm is designed to create a link between the ROOT Organization and a Locations entity. To use the form:

If Creatng a NEW Link:
Select an Organizations to Locations Link Reason Code from the drop-down list (mandatory)
Select an Author (mandatory)
Select a Start Date for the Link
Enter the known information about the Location The Descriptor, Type, Subtype and Status are mandatory
Optionally, use the checkmark to display a list of possible duplicate Location entities. If you select a Location entity from the list, it will REPLACE the entered Location data and the Link will be created to the selected Location entity.
NOTE: Existing Location entity data cannot be edited in this form
Click OK to create the Link and return to the calling QuickForm.
Click OK and New to create the Link and clear the form ready for the NEW Link

If Editing an EXISTING Link:
The existing Link data is displayed on the form. All link values can be altered to edit the Link values.
A NEW Location entity can be created by clicking the X button.
A different Location entity can be chosen by using the checkmark button to display the Locations list.
Follow the same procedures for creating a new Link.

NOTE: When the Field Status is Partially Locked, the ability to edit the record is restricted by removing the OK and OK and New buttons from the form. Records are Partially Locked by setting the appropriate flag in the Custom Attributes of the entity - or under program control during a data import. This flag cannot be changed by the user.

Organizations to Communications Link

The Organizations to Communications QuickForm is designed to create a link between the ROOT Organization and a Communications entity. To use the form:

If Creatng a NEW Link:
Select an Organizations to Communications Link Reason Code from the drop-down list (mandatory)
Select an Author (mandatory)
Select a Start Date for the Link
Enter the known information about the Communication The Descriptor, Type, Subtype and Status are mandatory
Optionally, use the checkmark to display a list of possible duplicate Communication entities. If you select a Communication entity from the list, it will REPLACE the entered Communication data and the Link will be created to the selected Communication entity.
NOTE: Existing Communication entity data cannot be edited in this form
Click OK to create the Link and return to the calling QuickForm.
Click OK and New to create the Link and clear the form ready for the NEW Link

If Editing an EXISTING Link:
The existing Link data is displayed on the form. All link values can be altered to edit the Link values.
A NEW Communication entity can be created by clicking the X button.
A different Communication entity can be chosen by using the checkmark button to display the Communications list.
Follow the same procedures for creating a new Link.

NOTE: When the Field Status is Partially Locked, the ability to edit the record is restricted by removing the OK and OK and New buttons from the form. Records are Partially Locked by setting the appropriate flag in the Custom Attributes of the entity - or under program control during a data import. This flag cannot be changed by the user.

Organizations to ePlaces Link

The Organizations to ePlaces QuickForm is designed to create a link between the ROOT Organization and a ePlaces entity. To use the form:

If Creatng a NEW Link:
Select an Organizations to ePlaces Link Reason Code from the drop-down list (mandatory)
Select an Author (mandatory)
Select a Start Date for the Link
Enter the known information about the ePlace The Descriptor, Type, Subtype and Status are mandatory
Optionally, use the checkmark to display a list of possible duplicate ePlace entities. If you select a ePlace entity from the list, it will REPLACE the entered ePlace data and the Link will be created to the selected ePlace entity.
NOTE: Existing ePlace entity data cannot be edited in this form
Click OK to create the Link and return to the calling QuickForm.
Click OK and New to create the Link and clear the form ready for the NEW Link

If Editing an EXISTING Link:
The existing Link data is displayed on the form. All link values can be altered to edit the Link values.
A NEW ePlace entity can be created by clicking the X button.
A different ePlace entity can be chosen by using the checkmark button to display the ePlaces list.
Follow the same procedures for creating a new Link.

NOTE: When the Field Status is Partially Locked, the ability to edit the record is restricted by removing the OK and OK and New buttons from the form. Records are Partially Locked by setting the appropriate flag in the Custom Attributes of the entity - or under program control during a data import. This flag cannot be changed by the user.

Automatic File Uploading

eSolve allows external files to be automatically uploaded as eRecords and linked to a specific project. When enabled, eSolve watches a specific directory (and sub-directories) for files and - at the schedule set period - converts the files to eRecords. Once successfully processed, source files are deleted from the directory structure. Any file type matching the eSolve-approved list of eRecord file types can be uploaded. In addition to the file, two pieces of information are required to successfully upload files; the login name of the user - and the source project for the file. eSolve gathers this information from the INPUT directory and sub-directory structure:

[ROOT DIRECTORY]
-> [USER1 LOGON NAME]
--> [PROJECT 1 ID]
--> [PROJECT 2 ID]
-> [USER2 LOGON NAME]
--> [PROJECT 1 ID]
--> [PROJECT 4 ID]
...

For example:

C:\eSolveFileInput
-> dwhite
--> 13
--> 56
-> bsiddell
--> 13
--> 35

In addition, User logon names and Project IDs can be appended with descriptions enclosed in parenthesis. Values in parenthesis are ignored by the eSolve File Uploader, but add meaning to the users to help organize the files. For example:

C:\eSolveFileInput
-> dwhite (Dave White)
--> 13 (My Sensitive Project)
--> 56 (My Important Project)

It is responsibility of the user or System Administrator to create and maintain the external directory and sub-directory structure. Once a file has been processed, and no other files are present in the Project sub-directory, eSolve automatically deletes the Project sub-directory. User sub-directories are never deleted.

Set the options for the Automatic File Uploader as follows:

Enable File Uploader - Place a checkmark in the box to enable the Automatic Filer Uploader
Root Directory - Enter the fully qualified location on the SERVER where files will be placed. The location MUST exist on the eSolve server (ie: C:\eSolveFileInput)
Fail Directory - Enter the fully qualified location on the SERVER where files that failed to upload will be placed. The location MUST exist on the eSolve server (ie: C:\eSolveFailedUploads).
Enable Scheduler and Schedule time - enable the scheduler and set the schedule frequency that eSolve uses to check the Root directory for files
Extract Text - causes eSolve to attempt a text extraction from uploaded documents. Extracted text is available for searching and manipulation. eSolve can extract text from most DOC, XLS, PDF, HTML, RTF, and TXT files.
Notification on Success and Notification on Failure - sets a flag that triggers an email for each file uploaded. The email is sent to the user's email account (if set) whose directory was used for the file upload process.

Automatic File Uploading

Action on Failure - set the action if eSolve fails to upload the file as an eRecord; No Action, Move to Fail Directory (see above), or Delete File.
Manual Upload button - Use this button to manually trigger a scan of the Root Directory for new files set for upload.

There are several reasons a file may fail to upload:

The file type is not a valid eSolve eRecord file type.
The user does not have sufficient permissions to create new records in the Project.
The user's File Upload option is not set in their user account.
The file exceeds the maximum allowed file size
A technical error in the file upload process

The eSolve File Uploader can be combined with other 3rd party software to add additional file pre-processing capabilities. For example, Adlib Express (www.adlibsoftware.com) can be used to automatically OCR and convert to PDF any number of files submitted to it. When the Adlib Express OUTPUT folder is set to the eSolve File Uploader ROOT directory, users can have a completely automated Document management system that:

Reads (OCR) documents of a wide variety of file types, whether they have embedded text or not
Converts them to a standard format of the user's choice (ie: PDF)
Optionally adds watermark or sequential (Bates) numbering - or other header/footer information
Optionally paginates files
Uploads them to eSolve as internal eRecords linked to a specific project and "authored" by a specific user.

Assignment Templates

Assignment Templates are used to quickly create a new ASSIGNMENT based on values pre-defined within a template. Much like a Word Document template, common values are "pasted" into a new Assignment to pre-populate critical fields before the Assignment is saved. This saves time and promotes consistency. Assignment templates can only be used when they are associated to a Project template; they cannot be used stand-alone. To create and manage Assignment templates, select a template from the list or click the New button:

Complete the Assignment template form as you would for any other Assignment
Click Apply or OK to save the new template.
Optionally, use the Notifications hyperlink to set the automatic Email notification options for the assignment

Assignment templates can be edited by clicking on them from the Assignment list and editing the values in the form.

When a new Project is created from a Project template, ONE new Assignment is also created for EACH Assignment template associated to the Project template.

An unlimited number of Assignment templates can be created and stored in a Project template.

Visual Links Interface Configration

Visual Links (VL) is a powerful visual link analysis tool designed to draw relationship (Link) charts from data drawn from the eSolve database. eSolve uses the latest Flash Visual Links interface to display charts launched in a separate browser window. Visual Links uses pre-configured MODELS to chart existing Links between the ROOT Entity and any linked Entity (to a first - or primary - level). Entities are represented by icons on the chart display. By default, each icon will also display theEntity Descriptor, Type, Subtype and Status value. Depending on the security values configured below, users may also have access to more detailed Entity data and the ability to search for values.

Note: eSolve individual Entity Security is NOT respected in the Visual Links interface. Therefore, unauthorized access to restricted data may be possible.

Administration of the eSolve to VL interface is configured from this form:

Enable Visual Links - Place a checkmark in this box to enable the VL interface.

Note: you must have the eSolve-enabled version of Visual Links correctly installed and configured, otherwise a program error will result. Please contact eSolve support for assistance (www.esolve.ca)

In the following fields, place a integer value from 0 to 99. When a user tries to access a Visual Links function, this value is compared to the user's READ permission value for their account. If the user's READ value equals or exceeds the parameter value, access to the function is enabled.

General Access - The user can display the basic chart
Basic Search - The user can perform a basic find across all Entity fields in the MODEL. Even though a match is indicated, the user may NOT be able to view the instance of the text from the march field (see Show Details below)
Advanced (Form) Search - The user can display an advanced form that allows a search to be performed across any available MODEL, and any Entity defined in that MODEL, and any field within the Entity, providing it is defined in the MODEL. Users can browse available data values in any field, and use pre-defined comparison operators.
Walk (Explore) Entities - Users can choose any chart icon and WALK (expand) the chart to include available first-level Links.
Show Details - The user can display fielded data from any Entity providing it is included in the MODEL.
Print Results - The user can access print functions with the Flash Vl interface.