CASEX

USER MANUAL

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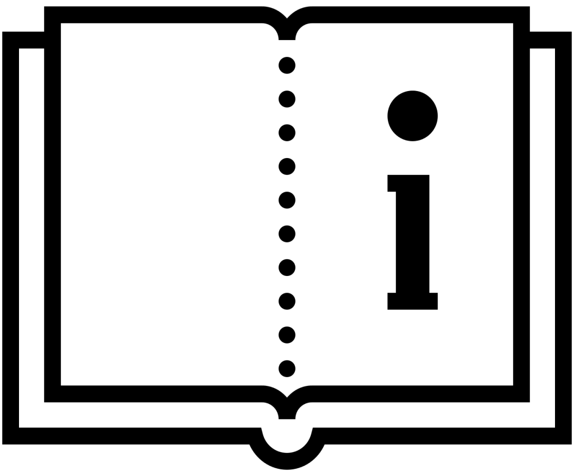

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SECTION: **INTRODUCTION**

Welcome to the CaseX User Manual. In this document, you will find useful information about the installation and use of the software CaseX. The manual is divided into sections describing how to complete various actions.

CaseX was developed in the 2017 Fall semester for CMSI 401 at Loyola Marymount University by Andrea Carver, Eileen Choe, Carleen Petrosian, and Allen Vartanian.

SECTION: **SOFTWARE INSTALLATION**

This section remains incomplete since we have not yet decided where to host the server.

SECTION: **USER INTERFACE**

TERMS

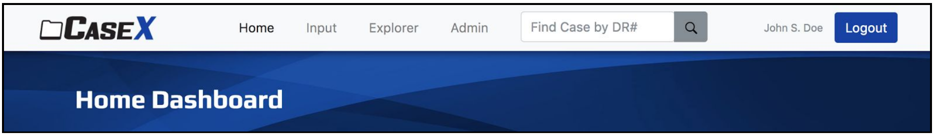
A CaseX **user** is any person with a CaseX account. You may provide them with one of three access tiers: Administrator, Form-Filler, or Read Only.

The **user interface** is the buttons, text, and images you see when on the CaseX website.

The **navigation bar** is the top row of buttons that allows a user to switch between pages.

This section describes the layout and organization of the user interface. The CaseX website is divided into five distinct pages, each serving one major purpose as follows:

PAGE	PURPOSE
Home Dashboard	View summary statistics in the form of charts and graphs.
Input Case Data	Upload case, victim, and suspects to the CaseX database.
Data Explorer	View uploaded cases, make searches, and export findings.
Admin. Console	View, add, or delete CaseX users.
Individual Case Info	See all information about a case, make edits, or delete the case.



The navigation bar as seen from the Home Dashboard.

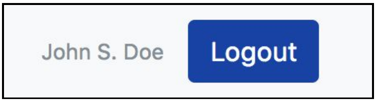
Each of the above pages can be reached by clicking on the corresponding button in the navigation bar. The Individual Case Info page, however, must be reached by entering the desired DR# in the “Find Case by DR#” search bar and clicking the search icon.

SECTION: **LOGIN / LOGOUT USER**

When a user is not logged in, they cannot access CaseX pages. They must first log in by clicking on the "Login" button in the top-right corner of the screen. Clicking the login button will take the user to the Login page as seen below.

The email and password fields on the Login page.

Next, enter the email and password associated with your CaseX user account. Then, click the "Login" button under the email and password fields. If your email and/or password are incorrect, CaseX will notify you to make changes. If they are correct, you will be rerouted to the Home Dashboard page.



The logout button on the navigation bar.

Once a user is logged in, they may perform all actions available to their access tier (Administrator, Form-Filler, or Read-Only). Once they have finished their work session, they may log out by clicking on the “Logout” button in the top right corner of the screen. Doing so will reroute to the Login page.

SECTION: **HOME DASHBOARD**

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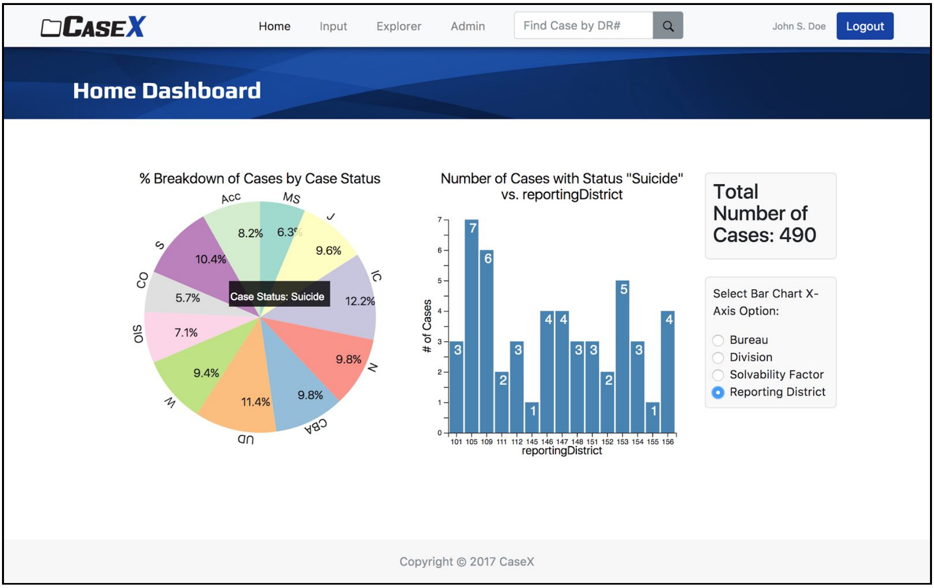
Data visualization refers to graphs, charts, and visual diagrams that help people understand data.

The Home Dashboard exists as landing page for CaseX users. From the Home Dashboard and all other pages, the user may navigate to other pages or log out.



The CaseX Home Dashboard.

Unique to the Home Dashboard is a data visualization dashboard. The purpose of this dashboard is to enable users to quickly explore the trends of the case data currently in the database. The dashboard consists of a pie chart and a bar chart.

The pie chart displays the percentage breakdown of all cases in the database by its "Case Status." The information displayed on the bar chart is linked to the user's choice of Case Status and xAxis Option.

The Case Status can be modified by hovering the mouse over the Case Status options in the pie chart.

The xAxis option can be modified by selecting an xAxis option on the rightmost panel of the dashboard.

SECTION: **UPLOAD CASES**

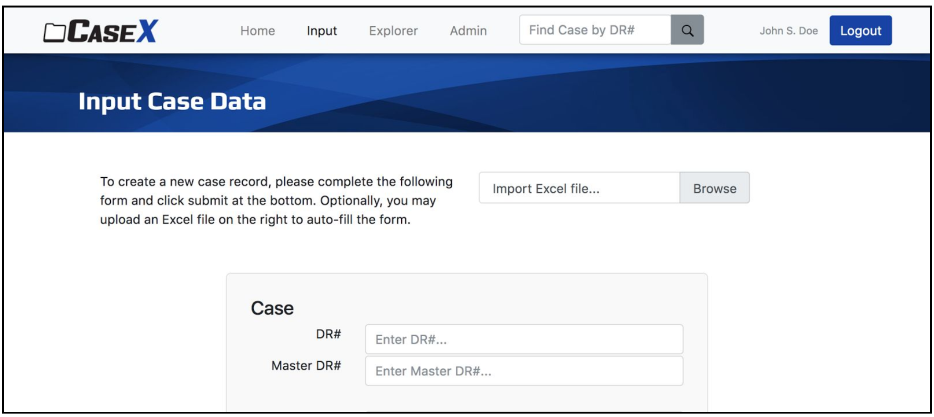
TERMS

A case has many **attributes**, including everything from its DR# to division to motive and more.

A **field** is the initially empty white box where you enter data. It may be in the form of a dropdown, raw text input, or other. Each field has a label on the left.

The **database** is where all information about cases, victims, and suspects are stored.

One of the most significant features of the CaseX software is the ability to digitize case records. CaseX provides a digital form where users that have Administrator or Form-Filler access level can upload cases to the database.



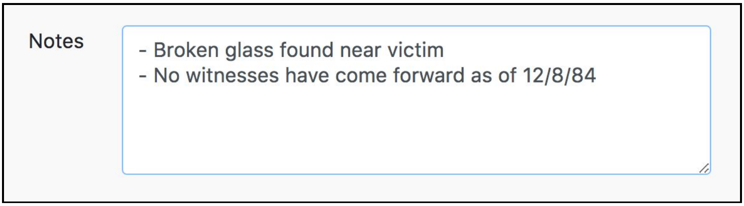
The Input Case Data page.

Click on this button to autofill fields from an Excel file.

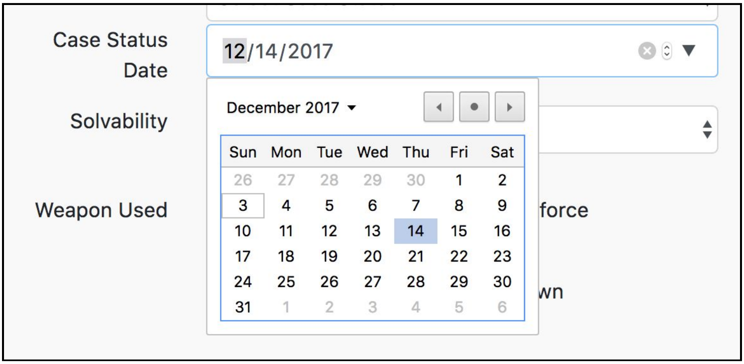
To ease the transition to digital file-keeping, CaseX offers the ability to auto-fill fields from an Excel file. This functionality is discussed in further detail in the Import / Export Excel section.

Different fields behave differently to user input. Based on the field type, please enter data in the following way:

FIELD TYPE	HOW TO INPUT
Text or number	Click on the field and type the desired value.
Dropdown	Click on the field and select the desired option
Date	Click on the field and type the desired date. Or, click on the arrow on the right side of the field and select the desired date.



Entering data into a text field.

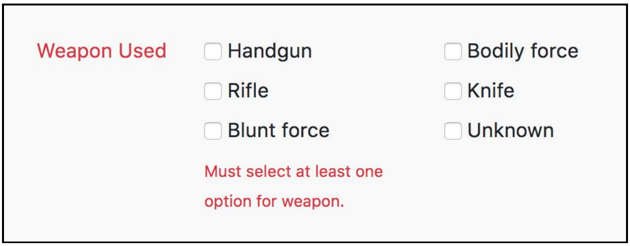


Selecting a date from a date field.

Selecting an option from a dropdown field.

SECTION: **FORM HELPER**

One benefit of digital records is the ability to automatically check that all fields have been filled out and are formatted properly. The Form Helper communicates such errors by highlighting erroneous fields in red and describing the issue. The Form Helper assists while creating case records (Section: Upload Cases) and creating new users (Section: User Management).

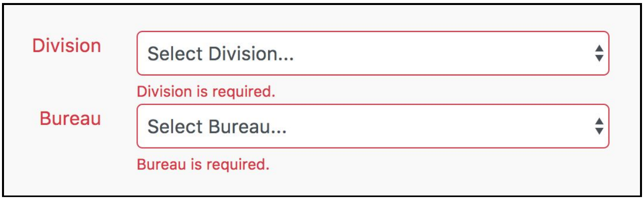


Form Helper indicates that at least one weapon must be selected.

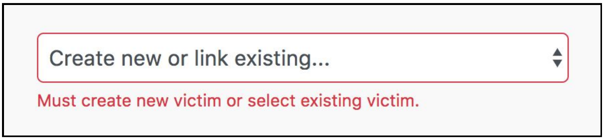
Various errors the Form Helper can detect include:

- Missing fields
- Incomplete sections
- Accidentally uploading the same data twice

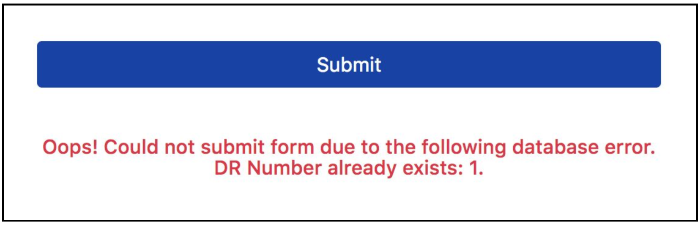
Examples of these types of errors are illustrated below:



Form Helper indicates that a case must have a division and bureau.



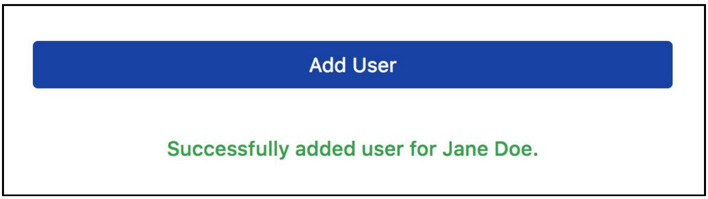
Form Helper indicates that a case must have a victim.



Form Helper indicates that a case already exists with the same DR#.

When Form Helper detects no further errors, the form will be submitted. If the user is uploading a case, then the case will be submitted to the database. If the user is creating a new user account, then the new user account will be created.

Form Helper indicates that the case was successfully uploaded.



Form Helper indicates that the user account was created.

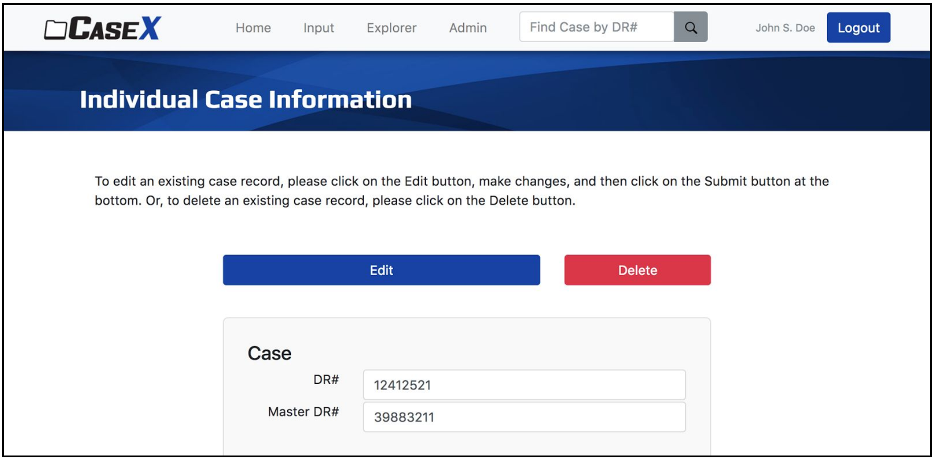
SECTION: **EDIT / DELETE CASE**

While the Form Helper can ensure data is properly formatted and not missing, it cannot help with errors such as misspellings or incorrect values. For instance, the division of a case may have been accidentally entered as “Harbor,” but the division should have been “Southwest.”

In situations similar to the one above, it will be necessary to make corrections by editing the case. First, identify the DR# of the case in question. Then, type the DR# into the “Find Case by DR#” searchbar on the right side of the navigation bar.

The “Find Case by DR# searchbar.

When finished typing, click the search icon on the right side. You will be redirected to the Individual Case Information page for the provided DR#.



The Individual Case Information page.

The Individual Case Information page allows you to make changes to or completely delete a case record.

To make edits, click on the "Edit" button, correct the fields with mistakes, and then click "Save" at the bottom of the page.

To delete a case record, click on the "Delete" button. You will be prompted with a dialog box to verify you truly want to delete the case. If you pressed the "Delete" button on purpose and not on accident, press "OK". The case record will be deleted from the database.

SECTION: **DATA QUERIES**

TERMS

To filter through all of the data to find the cases you need, make a **query** on the data. Queries find all cases that meet certain criteria that you can define.

The Data Explorer page is split into two sections: Query and Results. The Query section is where users specify what cases they want to see. The Results section displays a list of cases fitting the query. If no query is submitted, then all cases are displayed in the Results table.

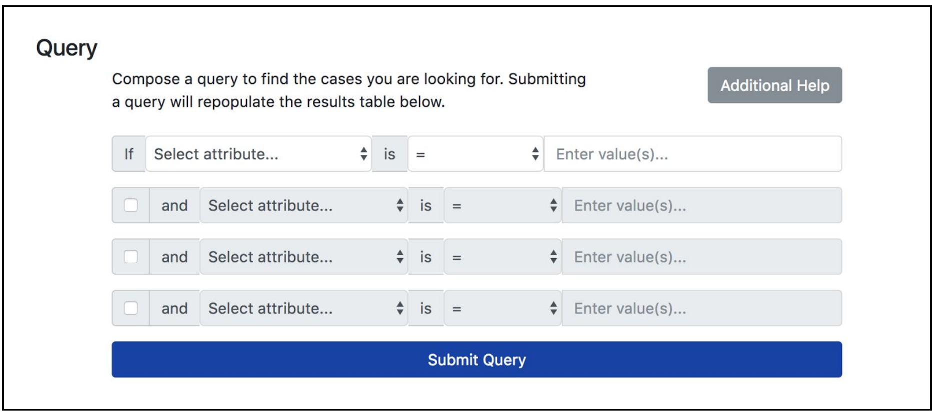
A query on the data is made up of one or more query rules. When the user submits the query, the database finds all cases that meet the query rules. Each query rule is made up of an attribute, a condition, and a value. A case will pass a rule if its value meets the specified test.

QUERY PART	DESCRIPTION
Attribute	Any recorded data point about the case like division or date occurred.
Condition	The type of test to use like equals, greater than, or less than.
Value	The value like “77th Street” or “12/04/1994” to test against.

Each different condition sets up a different test and filters data differently as described below:

CONDITION	WHAT IT FILTERS
=	The attribute of each case must be exactly this value.
>	The attribute of each case must be greater than this value (or later in time).
<	The attribute of each case must be less than this value (or earlier in time).

To use several rules at once, click the checkbox to the left of the rule to enable/disable the rule. Then, the results section will display cases that meet all of the rules.



The Query section of the Data Explorer page.

When you are finished building your query, click the "Submit Query" button on the bottom of the Query section. If you need assistance, click on the "Additional Help" button on the top right corner of the Query section.

If the database finds any cases that meet the query rules, then the Results section will display a table of the found cases.

Results

Show 10 entries Search:

DR #	Master DR #	Division	Bureau	Date Occured	Date Reported
0	0	Harbor	OSB	2017-11-11	2017-08-26
1	1	Harbor	OCB	2017-10-26	2017-09-26
2	2	77th Street	OSB	2017-11-09	2017-09-28
3	3	Southwest	OWB	2017-08-31	2017-11-04
4	4	Southwest	OWB	2017-08-18	2017-10-14
5	5	Harbor	OVB	2017-08-15	2017-09-28
6	6	Harbor	OSB	2017-09-25	2017-09-10
7	7	Southeast	OCB	2017-12-01	2017-08-11
8	8	Southeast	OWB	2017-11-29	2017-08-28
9	9	Harbor	OVB	2017-09-12	2017-09-22

Showing 1 to 10 of 491 entries

Previous 1 2 3 4 5 ... 50 Next

Export Results Table to Spreadsheet

The Results section on the Data Explorer page.

The Results table can be configured to display cases in different ways. By default, the table only shows 10 cases at a time. Click on the page numbers on the bottom right corner to select the next 10 cases, or the next 10 cases after that, etc. Click on the “Show # entries” dropdown in the top left corner to change the number of cases that display on a single page at once. Click on the arrows next to each attribute name to sort the table by that attribute. Click on an arrow again to sort the table by that attribute in reverse order.

To fit onto a web page, not all attributes are displayed for each case. To preview more attributes for an individual case, click on the blue “+” button on the right side of a case. More attributes and their values will be shown underneath the table entry. Then, to see all case attributes, click on the “Edit Case” button on the bottom of the attribute list.

SECTION: **IMPORT / EXPORT EXCEL**

CaseX can interact with common formats like Excel (.xlsx) through importing and exporting case data.

Case data can be imported from Excel while on the Input Case Data page. Click the "Import Excel file…" button and a file selection dialog will appear. Navigate to the Excel file and click the "Open" button in the bottom right corner.

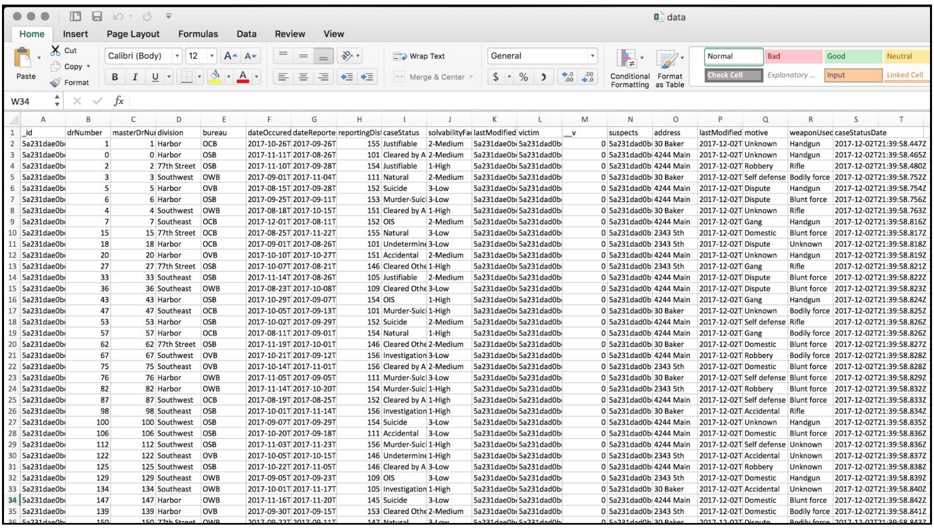
The "Import Excel file…" button on the Input Case Data page.

The Excel file must be properly formatted for the import to work. Please see an exported CSV file for the correct format (exporting will be explained in the following section). If imported successfully, then the fields will autofill with the found information. Then, click the "Submit" button at the bottom of the page and correct errors if necessary.

At the moment, no functionality exists for batch import.

The “Export Results Table to Spreadsheet” button.

To export case data to a spreadsheet format called Comma Separated Value (CSV) that can be opened by applications such as Excel, navigate to the Data Explorer page. Make a query or leave the table as is. Then, click on the “Export Results Table to Spreadsheet” button at the bottom of the page. A CSV file will be downloaded to your Downloads folder on your computer.

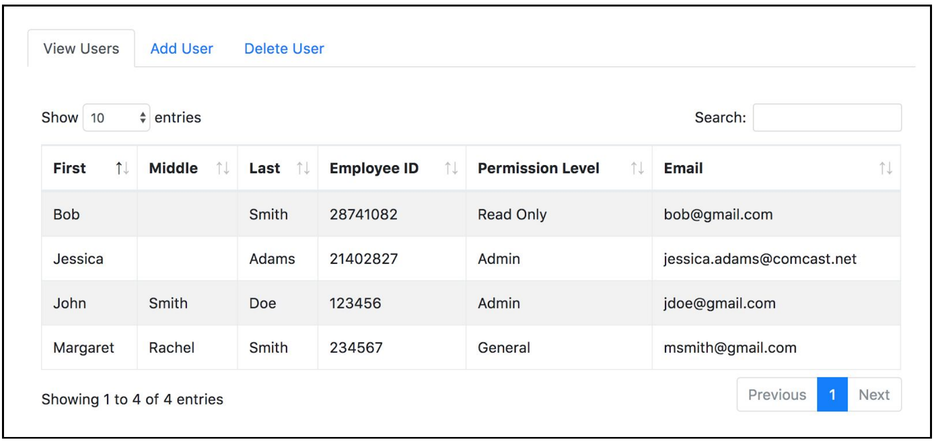


The generated CSV file opened in Microsoft Excel.

SECTION: **USER MANAGEMENT**

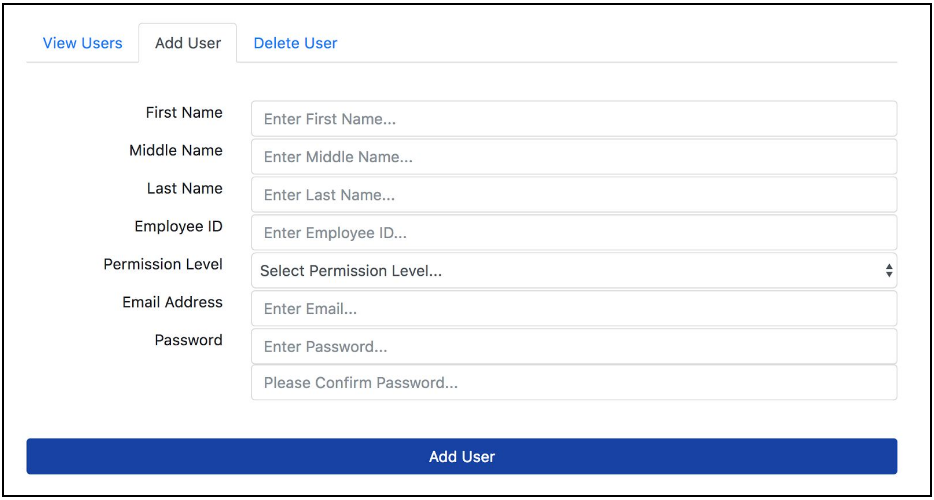
The Administrator Console page is where users with administrator privileges may view, add, and delete user accounts. Note that new users can only be added by existing administrators.

To view all of the existing users, navigate to the Administrator Console page and click on the “View Users” tab. The users table can be modified in a similar way to the case query table.



The “View Users” tab on the Administrator Console page.

To add a new user account, click on the "Add User" tab. Then, fill out each of the required fields. As with the Input Case Data page, the Form Helper will assist in correcting errors. Note that passwords must be longer than 8 characters.

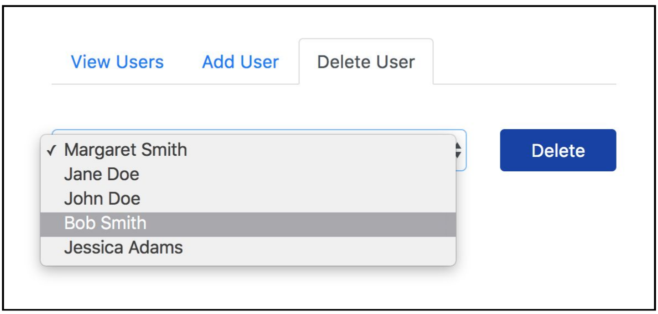


The "Add User" tab on the Administrator Console page.

The Permission Level attribute determines what actions the user account is limited to. Please select the lowest level tier as possible. For instance, it is advised to not give administrator access (Permission Level: Administrator) to users who only need to read the data (Permission Level: Read-Only). The three permission level tiers are described below:

PERMISSION LEVEL	DESCRIPTION
Read-Only	User can only make queries and generate reports.
Form-Filler	User can make queries, generate reports, and submit new case records.
Administrator	User can make queries, generate reports, submit new case records, edit/delete case records, and add/delete user accounts.

To delete a user, navigate to the “Delete User” tab on the Administrator Console page. Click on the “Select User…” dropdown field and then click on the user you wish to delete. Click the “Delete” button on the right side and the user account will be deleted.



Selecting user “Bob Smith” on the “Delete User” tab.

SECTION: **TROUBLESHOOTING**

Suggestions for common problems can be found below. If the problem persists, please contact the email below for further assistance:

casexhelp@gmail.com

ISSUE	SUGGESTION
“Could not submit form due to formatting errors.”	Please make corrections to all fields highlighted in red. If possible, the Form Helper will offer guidance on each erroneous field.
“Could not submit form due to the following database errors.”	Please double-check the inputted DR#, Master DR#, or other indicated fields. The Form Helper is trying to display an error that the database found.
“Must create new victim or select existing victim.” or “Must create new suspect or select existing suspect.”	Each case record must have at least one victim and at least one suspect. Please create a new one or link to an existing one.