



MCASE V6 UPGRADE

mCase v6 Highlights



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Revision Summary

Date	Description of Change	By
2023-01-23	Publish initial version	RedMane Ottawa Delivery Team
January 30, 2023	Final Version	RedMane Ottawa Delivery Team
February 6, 2023	Final Version with updated screenshots	RedMane Ottawa Delivery Team

What's New in mCase v6

New Homepage

The screenshot displays the mCase v6 homepage with a personalized dashboard. At the top, it says "Welcome back, Tom!" and includes an "Edit widgets" button. Below this is a "To do" section with filters for Record, Due Date (Default), and Priority, along with a "Reset Filter" button. The "To do" section contains several task cards, each with a title, user, due date, and priority level (e.g., "Complete Intake Form" by Jeanne Smith, due 01/26/2023, Overdue priority). Below the "To do" section are four main widgets: "Workspaces" (Persons, Issues, Investigations, Protection Cases, Foster Care/Kinship Provid., Prevention Cases, Programming & Activities, Shared Calendar, Adoption, Children in Care (CIC)), "Recent Activity" (showing updates by Tom Anderson), "Bookmarked Records" (a table with columns for Workspace, Record, and Creation Date), and "New Associated Record" (with buttons for Case Plan, Events, Notes, and Relationships).

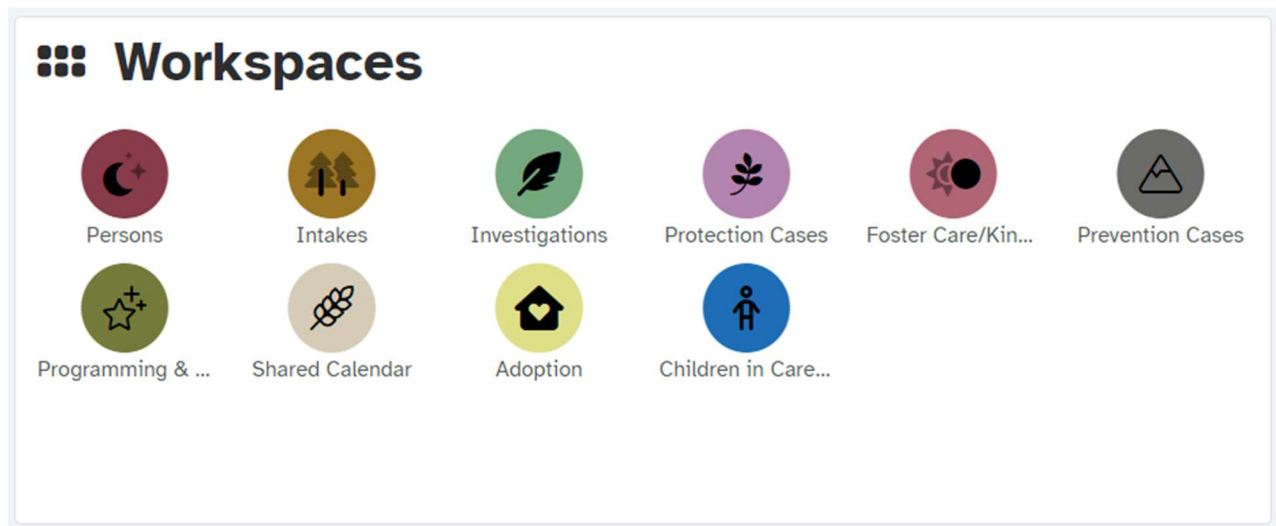
- New Home page allows users to easily see key details and prioritize their work.
- When users log in, Home is now their main landing page, which can be personalized by selecting and arranging their preferred widgets.
- Widgets such as the *To-do*, *Recent Activity*, *Bookmarked Records* and *New Associated Records* provide rapid navigation and quick access to key areas in the system.

To-do Widget

The close-up screenshot shows the "To do" widget with a header containing filters for Record, Due Date (Default), and Priority, and a "Reset Filter" button. Below the filters are five task cards, each with a title, user, due date, and priority level: "Complete Intake Form" (Overdue priority, red outline), "Inquire about care plan" (Critical priority, red outline), "File incident report" (High priority, orange outline), "Meet with John" (Medium priority, yellow outline), and "Check In with Caregiver" (Low priority, green outline).

- Users can now see their To-do action items prominently displayed on the Home page in a grid or list view that can be filtered based on specific records, Due Dates or Priority.
- To-dos are prioritized based on an agency's policy and practices with colour-coded levels indicating the importance of each item: Critical (red), High (orange), Medium (yellow), Low (green), No Priority (grey). If a To-do is not dismissed before the due date, it will have an overdue indicator including a red outline and an exclamation point next to the due date.
- Clicking the link within the To-do takes the user to the screen needed to complete the work.
- This widget will only appear when To-dos are created. To remove the widget from your Home page, click the *Edit Widgets*. (see the [Personalized Home Page Widget Layout](#) section).

Workspaces Widget



- This new Home page widget contains icons linking the user to each Workspace.
- In addition to the alphabetical listing within the Workspaces tab, v6 Workspaces can now be organized according to the business flow within the Home page widget.

Bookmarked Records Widget

The screenshot shows a widget titled "Bookmarked Records" with a table listing bookmarked records. The table has four columns: a bookmark icon, the Workspace name, the Record name, and the Creation Date. There are four rows of records. Below the table is a pagination control showing "1-4 of 4".


	Workspace	Record	Creation Date
🔖	Persons	John Winters	01-27-2023
🔖	Persons	Jeanne Smith	01-27-2023
🔖	Investigations	Investigation : 859692595 - John's Investigation	01-27-2023
🔖	Programming & Activities	Program: Youth Weekly Meet-up - 01/26/2023	01-27-2023

< 1-4 of 4 >

- Users can now bookmark records such as Person, Case, Intake, Programming, etc. for future reference. Bookmarking bypasses the need to search, to quickly navigate to a specific record.
- This widget lists bookmarked records with their associated Workspace, record name, and the bookmark creation date.
- Click the icon within the widget or the top left of the record, to manage a bookmark.



New Associated Record Widget


+ New Associated Record



Appointments








+ New Case Plan


- >  Protection Cases
- >  Children in Care (CIC)



Case Notes


+ New Events

- >  Investigations
- >  Protection Cases
- >  Prevention Cases
- >  Foster Care/Kinship Providers
- >  Intakes
- >  Adoption
- >  Children in Care (CIC)



Calendar

+ New Notes



Relationships

+ New Relationships

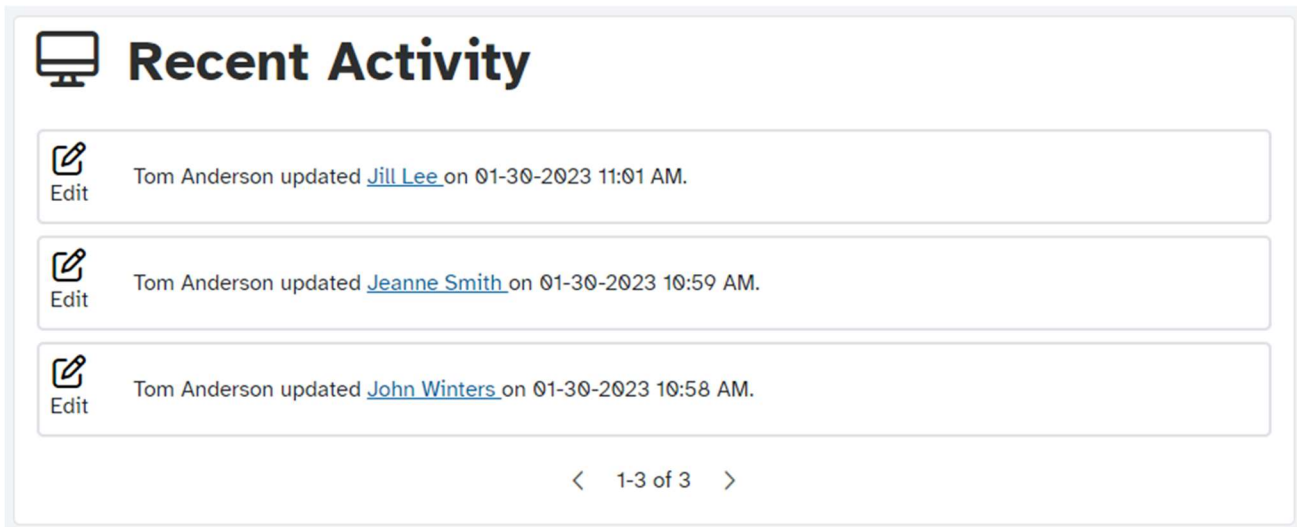
- Users can quickly create a new associated record, such as a Case Note, Appointment, or Calendar Event, with less navigation needed to reach the associated parent record.
- Clicking on an item in this widget displays a search dialogue asking the user to select a record to associate the activity with, where the user can then enter a new record directly.

New Relationships in Persons ✕

Q

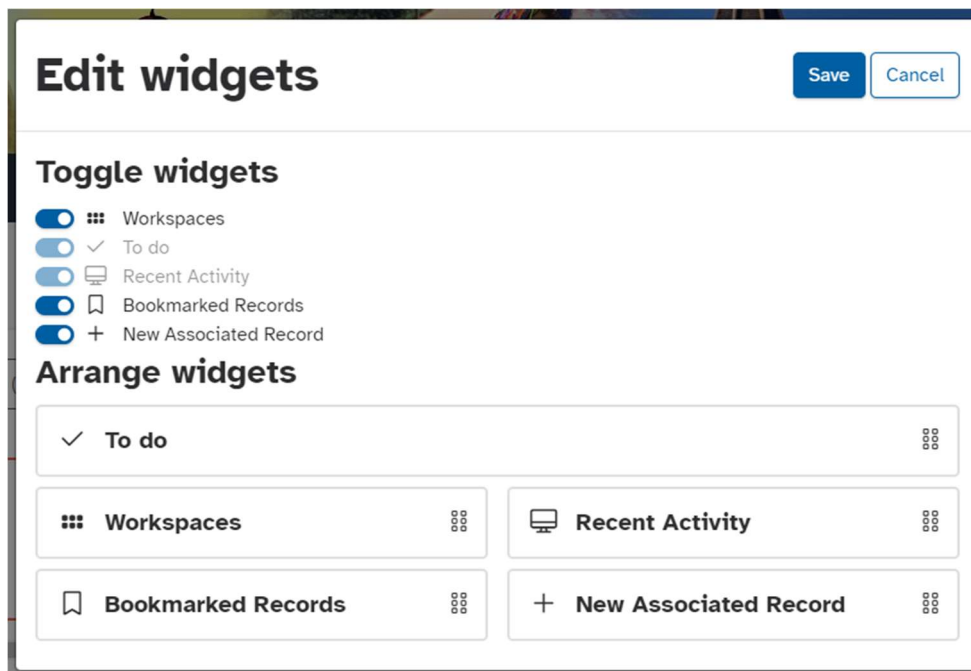
Person ID	Last Name	First Name	Middle Name	Date of Birth
183237669	Lee	Jill		
112598320	Smith	Jeanne		03/11/1994 (28 years, 10 months)

Recent Activity Widget



- Users can now see the most recent work performed on their records.
- Recent activity can help quickly navigate back to those same recently updated records.
- The widget displays a link to the record, the type of activity performed such as Create, Edit, Merge actions, along with who made the change and when.

Personalized Home Page Widget Layout




- *Edit Widgets* button allows users to personalize their Home page and widget layout.
- Users can toggle optional widgets On or Off, to display on their Home page.
- Users can drag and drop to rearrange the widget display on their Home page.
- Each agency decides which widgets are configured as mandatory, optional, or hidden entirely.

New Features

Version 6 update includes new features for bookmarking records of interest, making effective searches, and an improved look for tabs.

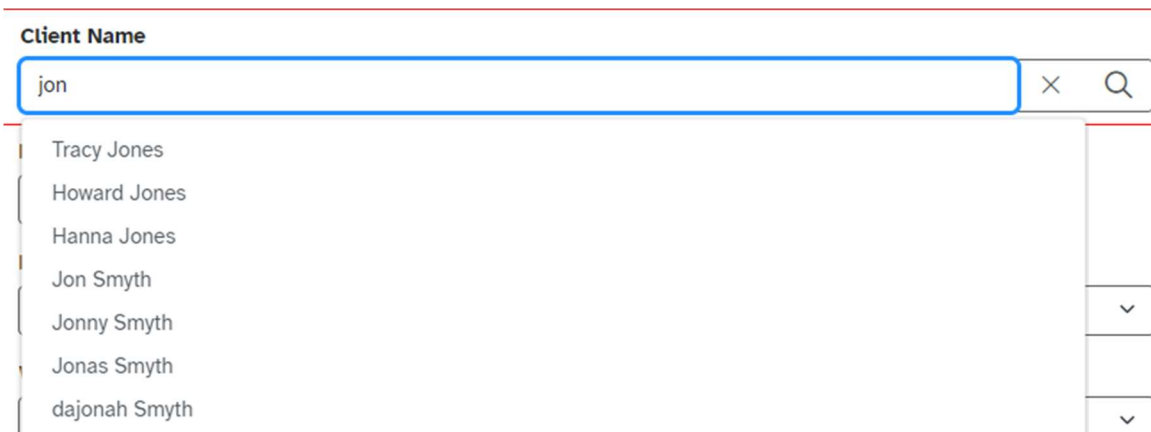
Record Header



- As mentioned above, users can now bookmark records for future reference and view a list of their bookmarked records from their Home page. A bookmarked record will display the black bookmark icon  in the top left of the record header.
- The top right of each record now displays the two most used action buttons (Edit and PDF) alongside the main action menu ...

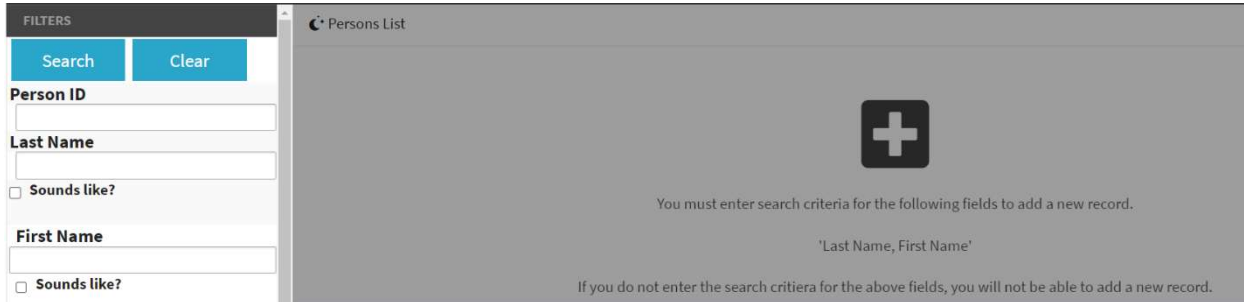
Predictive Search

- As a user types in the search bar, the search is refined to reflect results based on the additional input.
- A wildcard is enabled to display results for partial matches. For example, if the user inputs "Jon", then the predictive search will display results for "Jones" and "Jonny" and "Jonas" and "dajonah" alongside "Jon". Here is an example:

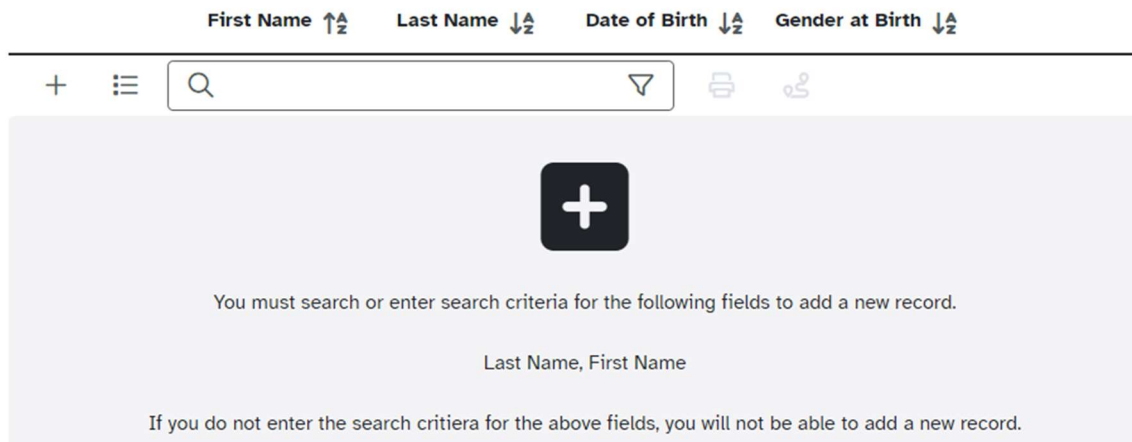


Mandatory Workspace Search

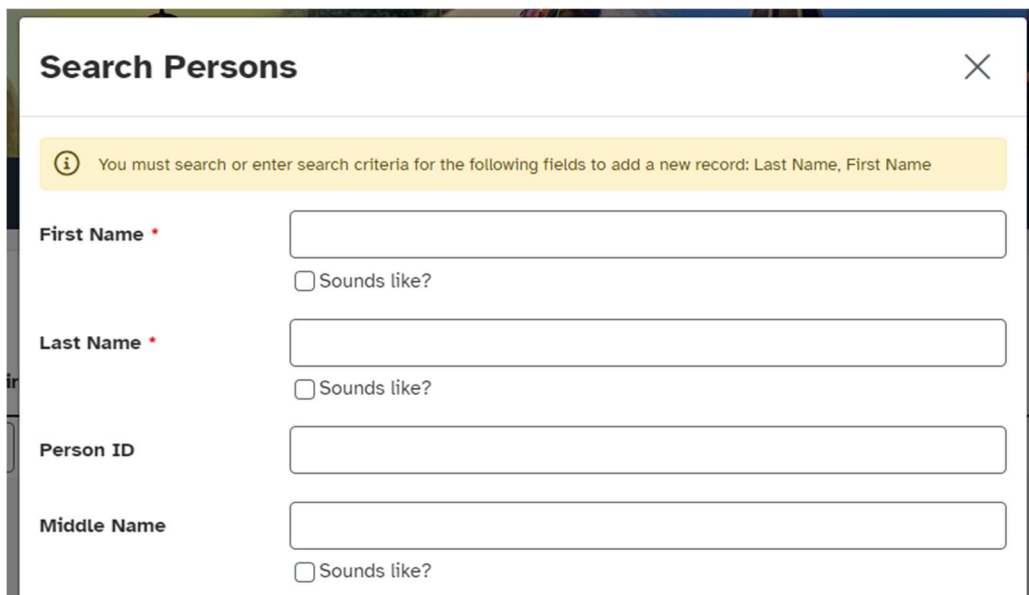
- To reduce creation of duplicate records, an advanced search is required before creating new records.
- This updated advanced search has a new pop-up window and more intuitive screen layout.
- Here is an example of how mandatory search appeared in v5:



- And here is a similar example in v6:



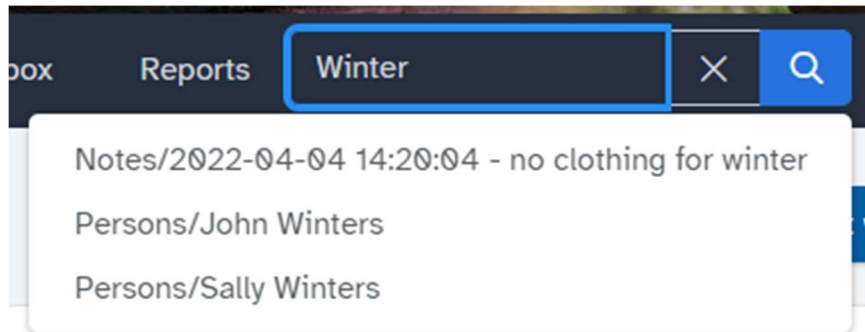
- Notice the advanced search window on the left-hand side in v5 is no longer visible.
- Users can simply type into the new search bar to perform a quick search.
- Clicking the + icon or the filter icon displays the advanced search as a pop-up window:



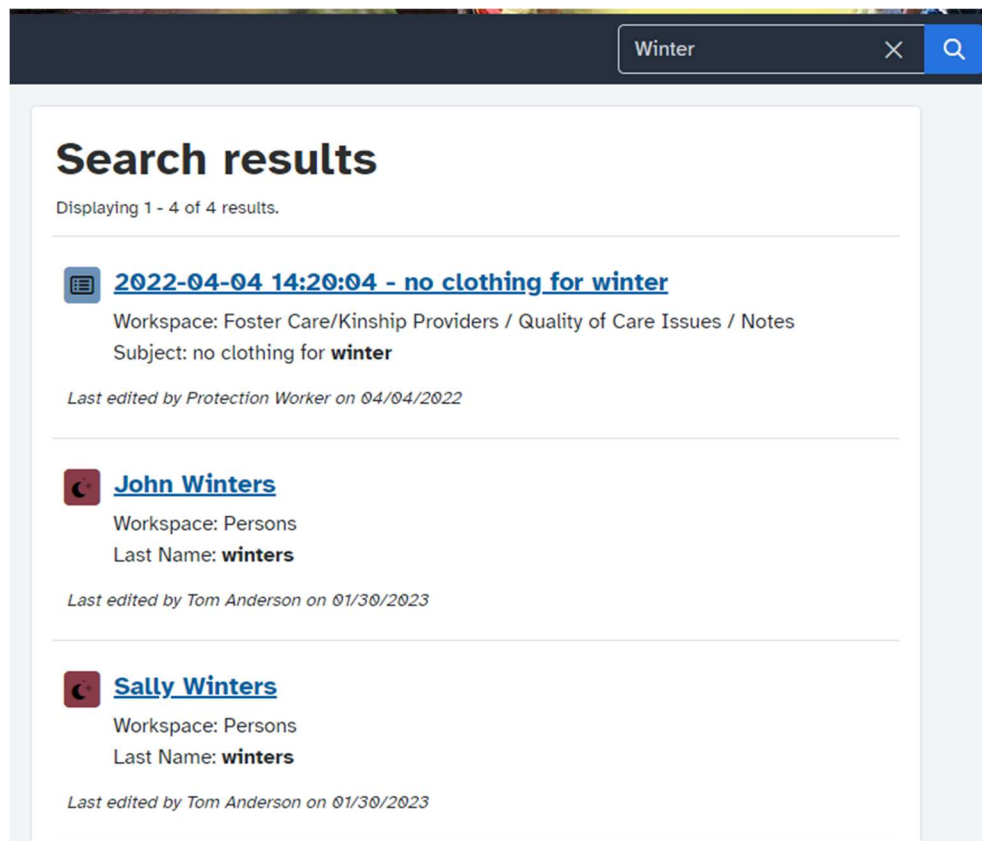
Improved Navigation

- RedMane has redesigned the Navigation Bar with a more intuitive way to move through the system.
- This includes access to the new Home page, a new Global Search from anywhere in the application, and improved display of the current tab and workspaces.

New Global Search



- RedMane has introduced a new Global Search in the Navigation bar.
- This new search is a Google-like search engine where a user can input a record ID number, partial name, or phrase to generate results across all record types (Person, Intake, Case, Programming, etc.)
- This broad, system-wide search differs from other mCase searches which are specific to a particular Workspace and require strict criteria to generate results.
- Users can select records from the dynamic quick pick results list (see above) or from the full results page (displayed when clicking the magnifying glass):



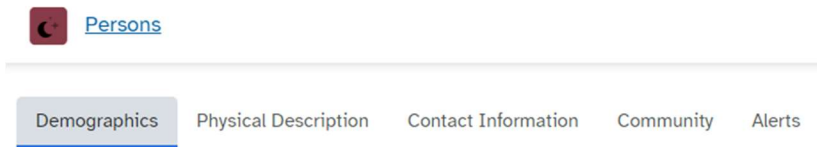
Workspaces

- The Workspaces tab now features an alphabetical listing of the agency’s Workspaces.
- This feature enables users to navigate to a desired Workspace from anywhere in the system.



Tabs

- For visual clarity and better text readability, the current tab has been updated with a light grey background and a blue underline.



Updated Workspace Pages

- mCase v6 now allows users to select how they want their Workspace to display, offering list, grid, calendar, and map views depending on the context.

