AXON

Evidence.com Cases Redesign Guide

Evidence.com December 2019

Table of Contents

Case Management

Axon Evidence.com's Cases functionality has been redesigned to provide a more robust and streamlined experience.

Because of the extent of the Cases redesign, there is an opt-in period of three months, during which you will be able to use the legacy Cases design. To have the redesign functionality activated during the opt-in period, contact your Axon representative or Axon Technical Support. At the end of the opt-in period, the legacy Cases design will no longer be available. The opt-in period will end in the March 2020 release of Evidence.com. Information about the legacy Cases design will continue to be available on the Axon Help Center.

Required Administrator Changes

This section is to alert administrators of changes to case permissions, critical workflow updates, and deprecated features that should be reviewed before the Cases redesign is enabled for your agency.

Case Categories - Deprecated

Support for adding categories to cases is being deprecated with the Cases redesign. This functionality was not commonly used by most agencies and removing it allows us to simplify the product experience. In the legacy version of Cases, users could add categories to a case which would allow the user to search for cases by category. If the category was restricted, it would also restrict access to the case. The restriction functionality has been migrated to the Case Access Control List, where a user can grant users/groups access to the case and restrict access to the case.

Users are still able to add tags to cases and search for cases by tag.

Shared Case Permissions - Deprecated

The Case access control list allows you to grant other users and groups in your agency access to cases and the related evidence. In the previous version of Cases, the role permissions for the cases that were shared to the user could have different permission settings than for the cases that were owned by the user. The permissions that control what the user can do with cases shared to them were managed by the "Shared Case" permissions, which are now being deprecated. With the addition of access lists on cases, those permission settings are now consolidated. When a case is shared to a user, the user will have the same permissions for the shared case as they would for a case they owned. However, if you want to limit the permissions the user is granted with the shared case, you can grant them View-only access, which allows the users to view the case information, but not make any changes.

Agency administrators should review their role permissions before the Cases redesign is enabled for your agency to ensure users will have the appropriate permissions on cases.

Restricting Cases

In the legacy version of Cases, a case was restricted by adding a restricted category, and adding categories required the “Case Edit” permission. In the Cases redesign, cases are restricted by using access control lists, which requires the newly added “Case Restriction” permission. Users who need the ability to restrict cases should have their roles updated to include this new permission.

All cases that are currently restricted by using restricted categories will still be restricted when the Cases redesign is enabled for your agency. After the Cases redesign has been enabled, cases can only be restricted or unrestricted by setting the Restrict toggle on the access control list window.

User Permissions for Creating Cases

The Cases redesign requires users to have the “Create Case”, “Edit Case”, and “Case Search” permissions in order to create a case. Users in roles that previously had the “Create Case” permission enabled but did not have the “Cases Search” and “Edit Case” permissions will not be able to create cases after the Cases redesign is enabled for your agency. Roles that already have the “Create Case”, “Cases Search”, and “Edit Cases” permissions enabled do not require any updates.

To give a role the Case Search permission:

1. In the Admin section of Evidence.com, in the Agency Settings section, click **Roles & Permissions**.
2. In the list of roles, find the role that needs Case Search permissions added, and click the (edit) icon to make changes.
3. On the Configure Role page, in the Search Access section, select **Allowed** for Cases Search.
4. Scroll to the bottom of the page and click **Save**.

To give a role the Edit Case permission:

1. In the Admin section of Evidence.com, in the Agency Settings section, click **Roles & Permissions**.

2. In the list of roles, find the role that needs Edit Case permissions added, and click the (edit) icon to make changes.

3. Scroll to the bottom of the page and click **Save**.

Case Flag - Deprecated

Support for flagging cases is being deprecated with the Cases redesign. This functionality was not commonly used by most agencies and removing it allows us to simplify the product experience. In the legacy version of Cases, users could flag a case, which would allow the user to search for cases by their flagged status.

Users are still able to add tags to cases and search for cases by tag.

Field Validation

You can use the Field Validation feature to ensure that Evidence.com users enter information in the agency-defined format for specific fields. The feature lets administrators use a regular expression (regex) entry to set the expected format for the field and enter descriptor text to provide format information to users. When field validation is enabled, the descriptor text appears as hint text in the appropriate Evidence.com field and as part of the error message if the user does not enter the correct format.

Configure Case ID Field Validation

Administrators and users with roles that have the Edit Agency Settings permission set to Allowed can configure field validation.

Whether you are enabling a field validation for the first time or just updating the regular expression, the steps for configuring field validation are the same.

1. On the menu bar, click **Admin** and then click **Field Validation**.

   The Field Validation page opens.

2. Select **Badge ID**, **Evidence ID**, or **Case ID** to enable field validation.

3. For each field validation that is enabled:

   - In the **Regex** box, enter the regular expression that you want to use for field validation.

     See Regular Expressions for Field Validation for information and examples of regular expression notations.

- In the **Descriptor** box, enter the text that you want to appear as hint text in field.

  See User Experience for an example of how the Descriptor text is used.

- Click **Save**.

Disable Case ID Validation

Administrators and users who are allowed both the Category Administration and the Edit Agency Settings permissions can disable case ID validation as needed.

1. On the menu bar, click **Admin** and then click **Field Validation**.
2. Select **Badge ID**, **Evidence ID**, or **Case ID** to disable field validation.
3. For each field validation that is disabled, click **Save**.

Regular Expressions for Field Validation

Using standard JavaScript regular expression notation, you can describe the format requirements your agency's fields. In order for a field entry to be valid, it must match the regular expression that you define.

The regular expression you specify must have a specific format.

- It must start with the following two characters: `/^`
- If you need field validation to be case *sensitive*, the regular expression must end with the following two characters: `$/`
- If you need field validation to be case *insensitive*, the regular expression must end with the following three characters: `$/i`
- Between the starting and ending characters, you provide a search pattern.

  `/^`*search-pattern*`$/`

  `/^`*search-pattern*`$/i`

The valid syntax for regular-expression search patterns is extensive and allows for great flexibility. However, if you are not already familiar with regular expressions it is strongly recommended that you review JavaScript regular expressions prior to implementing field validation in your Evidence.com agency.

For more information about JavaScript regular expressions, see the following sites:

- Regular Expressions User Guide — http://www.zytrax.com/tech/web/regex.htm

- Debuggex, a regular expression debugger site — https://www.debuggex.com/

Example Regular Expressions

The following table provides a few examples of ID formats and regular expressions that match only IDs that comply with the ID format.

ID Format Example & Description	Matching Regular Expressions and Comments
`YYYYMMDDnnnnnn` Four-digit year, two-digit month, two-digit day, and 6-digit number.	The following regular expression matches the YYYYMMDDnnnnnn format and requires that the ID begin with 20; however, it does not account for months with less than 31 days. `/^20\d\d(0[1-9]|1[012])(0[1-9]|[12][0-9]|3[01])[0-9]{6}$/`

`YYYY-nnnnnn`
or
`YY-nnnnnn`
 	
Four-digit year or two-digit year, a dash, and then a 6-digit number.
	The following regular expression allows any year between 2000 and 2099, with or without 20 at the start of the ID.
	
	`/^(20)?(\d\d)-[0-9]{6}$/`
	
	The following regular expression requires that the ID begin with 2015; however, at the start of the new year, you would need to modify the regular expression.
	
	`/^(20)?(15)-[0-9]{6}$/`

`XX-XXXX` Two characters, a dash, and then four characters.	The following regular expression allows any two alphanumeric characters, a dash, and then any four alphanumeric characters. `/^[\w]{2}-[\w]{4}$/`

Creating a Case

Cases can be created by administrators and users who have the necessary permission settings. For more information about role-based permissions, contact your administrator.

The Add Suggested Evidence feature makes it easy to add evidence to a case while you are creating the case. The feature finds any evidence files that include the ID you search for. For example, if you search for *345*, the results would include the evidence file IDs *12345* and *76345*.

1. On the menu bar, click **Cases**, then click **Create Case**.

   The Create Case page appears.

2. Enter a Case ID, using the format set by your agency.

If any evidence in your agency contains the ID entered into the case ID field, you will receive a message telling you how many pieces of matching evidence were found.

If any cases in your agency have the same ID that was entered into the case ID field, you will receive a message telling you that another case has the same ID. However, you can create a case with the same ID as another case.

3. Enter an optional description, then click **Select Evidence**.

   Evidence.com searches for evidence files that contain the same ID as the ID you used for the case and lists them as suggested evidence. If no evidence is suggested, you can search for evidence files. For more information, see [Text Search Details](#).

   The Select Evidence page lists 100 evidence files at a time. You can add multiple files to a case at one time. To select all of the evidence on the page, select the check box at the top of the list. If more than 100 evidence files are listed, you can select 100 at a time and click **Next** to view the next set of files.

4. On the Select page, select the check box to the left of the evidence, then click **Add to Case** or **Review**.

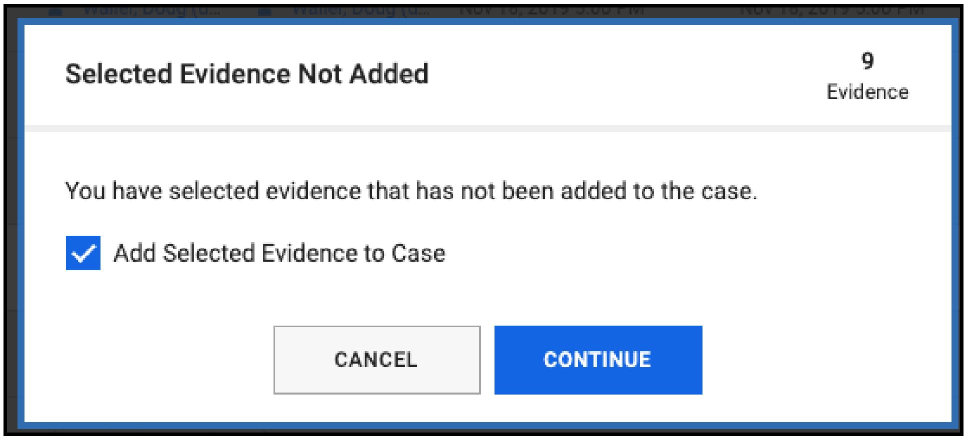
   - **Add to Case** lets you add the selected evidence to the case without reviewing it. Once evidence is added to the case, you can click **View Case Evidence** to see the list of evidence that was added to the case. You can also review the evidence and remove it from the case.

   - **Review** lets you review the evidence files you have selected before adding them to the case. In Review Mode you can view the metadata for the evidence, open the evidence details, or add the evidence to the case.

   Adding evidence files is not required to create a case. If you choose not to add any evidence files, you will see a message king you to confirm that you want to continue creating the case without adding evidence.

5. After adding evidence, click **Review Case Summary**. The Review Case Summary page opens.

   If you have selected evidence but not added it to the case before clicking **Review Case Summary**, you will see a message stating that you have selected evidence that has not been added to the case. The “add selected evidence to case” option is selected by default. If you do not want to add the selected evidence to the case, uncheck the box and click continue.



6. On the Review Case Summary page, review the case information to make sure it is correct or to add any additional information, then click **Create Case**. The case will be created, and the Case Details page opens.

   For more information about the tabs and actions on the Case Details page, see the Case Details Page.

Searching Cases

Evidence.com provides case search features to help you find the cases that you need. In the Cases area, you can use any of the three search pages:

- **All Cases** — Finds all cases, including cases you may not have permission to view. This is the default page for case search.
- **My Cases** — Finds cases that you own. The Owner filter is automatically set to your name.
- **Shared Cases** — Finds cases that have been shared with you by the case owner or another user with permission to share the case.

1. On the menu bar, click **Cases.**

   The All Cases page lists all cases, no matter what status they are, sorted by the date they were last updated.

2. Search for the cases that you need. The following table provides steps for search-related tasks.

Task	Steps
View a case	Click the ID of the case.
Find cases that you own	Click **My Cases**.
Find cases that are shared with you	Click **Shared Cases**.
Change search results	1. Update the case search filters. For more information, see Case Search Filters. 2. Click **Search**.
Sort search results	Click the column heading for **ID**, **Create Date**, or **Last Update Date**. To reverse the sort order, click the heading again.

Working with Case Search Results

On the case search pages — All Cases, My Cases, or Shared Cases — you can take the actions described in this section. To access these actions, click **[...]** and select an action from the Secondary Actions menu.

Export Case Search Results

You can export the results of a case search in PDF, Microsoft Excel, text, or CSV format.

Note: When case search results are exported in Microsoft Excel or CSV format, the case owner's First Name and Last Name are in separate columns and a Badge ID column is included.

If the search results contain more than 500 cases, Evidence.com exports the search results in 500-case segments and asks you to confirm the download of the next segment.

To export case search results:

1. Search for the cases that you want to export, then click **Export**.
2. In the **Select Type** list, select the file format you want to use and click **Export**.

   The case search results download in the format that you specified.

   If the case search results contain more than 500 cases, only the first 500 cases are included in the downloaded file, and Evidence.com displays a dialog box for downloading the next 500 cases in the search results.
3. If you want to export case search results for additional cases, click **OK** each time the confirmation dialog box appears.

The case search results download in a separate file for each 500-case segment of the search results.

Case Search Results Bulk Actions

There are multiple actions you can perform on cases you select from the case search results. To access these actions, click the Secondary Actions menu button **[...]**.

Reassign — You can change the owner of a case by reassigning it.

1. Search for the cases that you want to reassign.
2. For each case that you want to reassign, select the check box to the left of the case.
3. Above the search results, click Reassign.

   A dialog box appears.
4. In the **Reassign cases** field, start typing the name of the user you want to reassign the case to, wait for Evidence.com to show the list of matching users, then click the name of the user you are looking for.
5. Select the user you want, then click **Reassign**.
6. In the confirmation dialog box, click **OK**.

   The search results will update to show that the user you selected is now the case owner.

Grant Access — When you need to share a case with users or groups who are in your agency, you can grant access to the case from the results of a case search.

1. Search for the cases that you want to share.
2. For each case that you want to share, select the check box to the left of the case.
3. Above the search results, click **Grant Access**.

   A dialog box appears.
4. In the **User or Group** field, start typing the name of the user or group you want to share the case with and wait for Evidence.com to show the list of matching users or groups.
5. Select the user or group you are looking for, then click **Share**.

   Note: The user or group selected will be granted role based access by default until they are manually removed from the Case Access Control List. To grant the user or group View Only access to the case and related evidence, click the drop-down menu under Access level and select the desired setting. To adjust how long the user or group will have access to the case and related evidence, click the drop-down menu under Duration and select the desired duration.

6. In the confirmation dialog box, click **OK**.

Update Status — You can change the status assigned to one or more cases in search results.

1. Search for the cases whose status you want to update.
2. For each case you want to change the status of, select the check box to the left of the case. Above the search results, click **Update Status**.

   A dialog box appears.

3. Select the status you want from the drop-down list, then click **Update**.

   The search results show the new status you assigned to the cases.

Delete — You can delete cases that are listed in case search results. Cases with a deleted status can still be viewed.

> **Note**: When you delete a case, Evidence.com removes all evidence from the case and begins enforcing the retention policy determined by the categories assigned to the evidence. This may result in evidence being immediately queued for deletion.

1. Search for the cases that you want to delete.
2. For each case that you want to delete, select the check box to the left of the case.
3. Above the search results, click **Delete**.

   A confirmation dialog box appears.

4. Click **Delete**. A notification message box appears.
5. On the notification message box, click **Close**.

If you want to confirm that the case status is Deleted, click **Search**, locate the case in the search results, and view the case status.

View a Case

You can view cases listed in in the search results if any of the following are true:

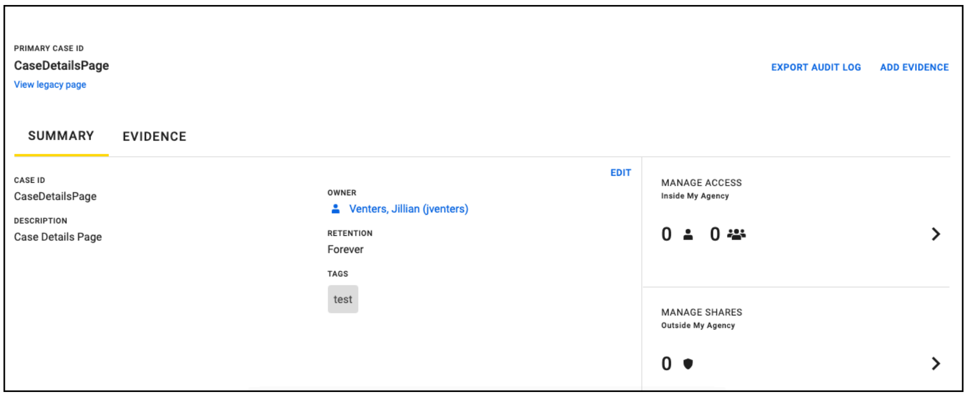
- You own the case and your role allows you to view your own cases.
- The owner of the case has shared it with you.

- Your user role allows you to view all cases.
- You are an administrator.

To view a case:

1. Search for the case you want to view.
2. In the search results, click the ID of the case.

   The Case Details page opens.



Case Details Page

The Case Details page has two tabs:

Summary — This tab shows an overview of information about a case, including the case ID, description, owner, how long the case will be retained, tags, any pinned evidence, and notes. For more information about the actions available on this tab, see Summary Tab.

You can also manage access to the case and share the case to external agencies from the Summary tab. For more information about managing access and shares, see Cases Access Control Lists and Sharing Cases to External Agencies.

Evidence — This tab shows an overview of information about the evidence attached to the case, including any pinned evidence, evidence folders, and evidence quick views. For more information about the actions available on this tab, see Evidence Tab.

You can export an audit log for a case and add evidence to the case from both the Summary and Evidence tabs on the Case Details page.

Export a Case Audit Log

The audit log of a case shows what updates were made to a case and when, including when tags have been added or removed. You can export a PDF with the entire audit trail, or with information about a specific date range.

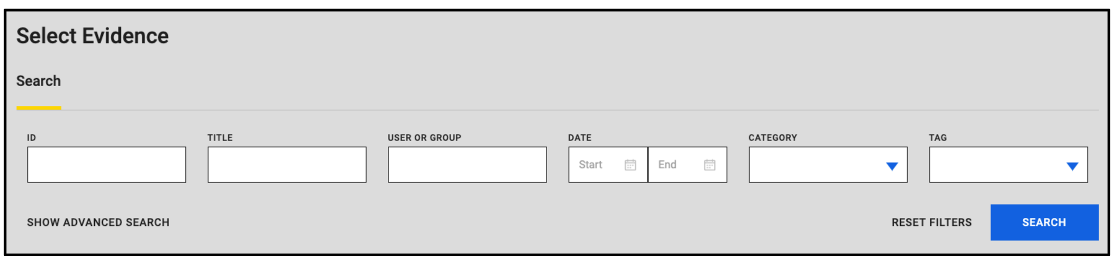
1. On the Case Details page, click **Export Audit Log**.
2. In the Audit Trail dialog box, select the date range you want from the **Date Range** drop-down list.
3. Click **Download**.

The PDF of the export log will open in a separate window. Review the information, then download the PDF.

Add Evidence to a Case

1. On the Case Details page, click **Add Evidence**.

   An evidence search page appears.



2. Search for the evidence that you want to add to the case. Use the search filters to refine your results. For more information, see [Evidence Search Filters on the Axon Help Center](#).
3. For each evidence file that you want to add to the case, select the check box to the left of the evidence ID.

   Note: To upload new evidence to a case, click the **Import** tab on the Evidence Search page.

4. Click **Add to Case** or **Review**.
   - **Add to Case** lets you add the selected evidence to the case without reviewing it.
   - **Review** lets you review the evidence files you have selected before adding them to the case. In Review Mode you can view the metadata for the evidence, open the evidence details, or add the evidence to the case.

5. Click **Done**.

   The evidence will now be listed on the Evidence tab of the Case Details page.

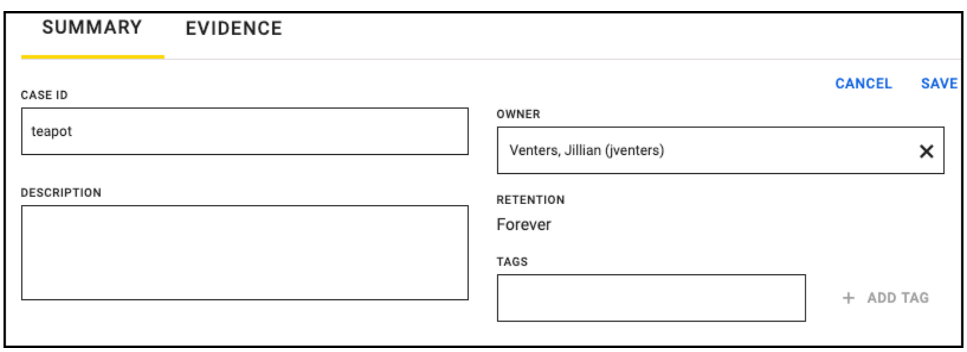
   If you are adding evidence to a case that has been shared with a partner agency, you will be prompted to update your case share.

Summary Tab

The Summary tab on the Case Details page shows an overview of information about a case including the case ID, description, owner, how long the case will be retained, tags, any pinned evidence, and notes.

Edit the Case ID, Description, or Owner of a Case

1. Click **Edit**.



2. Enter your changes, then click **Save**.

   If you are changing the owner of the case, start typing the name of the user in the **Owner** field that you want to reassign the case to, wait for Evidence.com to show the list of matching users, then click the name of the user you are looking for.

Add and Remove Tags for a Case

Tags are labels that you can apply to cases and evidence. You can use tags to filter search results to find a case or evidence more easily.

Tags are located on the Summary tab of the Case Details page. If any tags exist, they appear as tiles. The following figure shows an example of the Tags area that has one tag named "McKinley".

The following table shows the steps for tag-related tasks:

Action	Steps
Add a tag	1. Click **Edit** on the Summary tab of a Case Details page. 2. In the Tags field, start typing a tag name. Evidence.com shows you a list of existing tags that start with the letters you typed. 3. If the tag you want to apply appears in the list, click the tag. 4. If the tag doesn't already exist, add the new tag name, then click **Add Tag**. 5. Click **Save**. Evidence.com adds the tag to the case.
Remove a tag	1. Under Tags, find the tag that you want to remove and click **X**. 2. Click **Save**. Evidence.com removes the tag from the case.

Case Notes

The Notes section of the Summary tab organizes comments on the case from users, with the newest notes at the top of the section.

To add a note to a case:

- Type in the **New Note** field, then click **Add Note**.

To edit or delete an existing note on a case:

1. Hover your mouse pointer over an existing note.
2. Click the Secondary Actions menu button **[...]** and select **Edit** or **Delete**.
    - **Edit**: Make your changes and click **Save Note**. When you edit a note, the note is updated to list you as the author of the note.
    - **Delete**: Click **Delete** in the confirmation window.

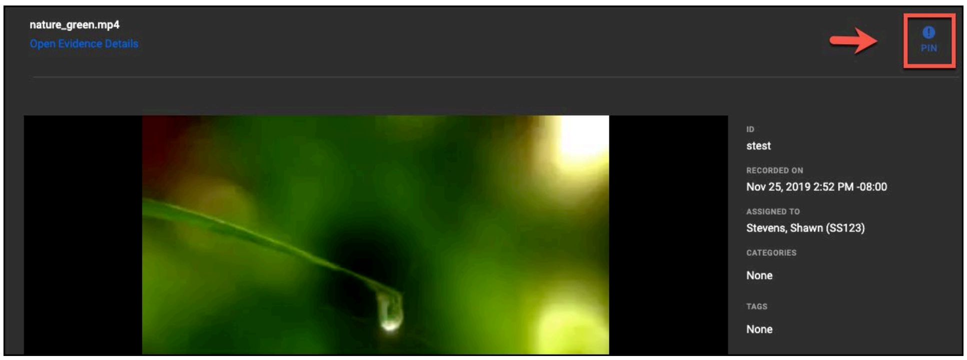
Evidence Tab

This tab shows an overview of information about the evidence attached to the case, including any pinned evidence, evidence folders, and evidence quick views.

Pin Evidence

Pinning evidence is a way to keep the most relevant or critical evidence at the top of the evidence and summary sections in a case. Evidence can only be pinned in a case when you are reviewing it.

1. On the Evidence tab, select the check box of the evidence you want to pin to the case, then click **Review**.
2. After the evidence file opens in Review Mode, click **Pin**.



3. Click ☒ to return to the Evidence tab.

   Note: If you click **Review All**, you can pin each piece of evidence as you review it.

Evidence Quick Views

The Evidence Quick Views let you quickly navigate evidence based on the following metadata information:

- Evidence file type.
- The user who recorded the evidence.
- The evidence ID.

For example, if the File Type section shows there are images, videos, and audio recordings files, you can select Image, and the evidence list will show only image file types. If you click **Reset**, the evidence list will clear your selections and show all the evidence in a case.

The Quick Views section is automatically updated as evidence is added or removed from a case.

Case Evidence Search Filters

Case evidence search filters help you search for specific evidence attached to a case based on the metadata of the evidence. You can select multiple filters to use for searching, but the results will only include evidence contained in the case that match all of the filters you use.

Each search filter will only contain values that exist on the evidence in the case. For example, the category search filter will only display categories that exist on evidence in the case. These dropdown menus on the search filters allow you to select multiple values from the dropdown menu. When multiple values are selected the system does an OR search, so evidence matching any of the selected values will be returned.

- **ID** — Filters the list of evidence by ID. For more information, see Text Search Details.
- **Title** — Filters the list of evidence by matching titles.
- **Recorded By** — Filters the list of evidence by the user who recorded the files.
- **Uploaded By** — Filters the list of evidence by the user who uploaded the files.
- **On Access List** — Filters the list of evidence by the users or groups who have access to the files.
- **Recorded On** — Filters the list of evidence by the date the files were recorded.
- **Uploaded On** — Filters the list of evidence by the date the files were uploaded.
- **Deleted On** — Filters the list of evidence by the date the files were deleted.
- **Category** — Filters the list of evidence by the category you select. By default, the search results include evidence assigned to any category, including uncategorized cases.
- **Tag** — Filters the list of evidence by the selected tags. For more information, see Text Search Details.
- **File Type** — Filters the list of evidence by the selected file types.
- **Status** — Filters the list of evidence by the selected status. For example, selecting *Pending Triage* would only show evidence files with that status. By default, case searches include all statuses.
- **Source** — Filters the list of evidence by evidence source. For example, selecting *Body Worn Cameras* would only show evidence files recorded by that hardware.
- **Restricted** — Filters the list of evidence to only files that are restricted. By default, the restriction filter is not enabled.
- **Device** — Filters the list of evidence by device serial number.

Text Search Details

The ID and Tag filters provide advanced text matching capability for case searches.

- You can enter letters, numbers, and the special characters: comma [,], dash [-], opening parentheses [( ], closing parentheses [ )], slash [/], and backslash [\ ].
- The text you enter can be a full or partial match of the data you are filtering. For example, if you enter *21* in the ID box, the search results will include any evidence with 21 in any portion of the ID, such as *2197* and *446219*.
- You can search for more than one text string in a single filter by adding a space between the strings. This provides `AND` search functionality of the data you are filtering. For example, if you enter *12- 34* in the ID box, search results include any evidence with both 12- and 34 in the ID, such as *12-3456* and *12-7348*.
- The order of text strings is irrelevant. For example, if you enter *78 21* in the ID box, search results include evidence with the ID *21378* and *172182*.

  Capitalization for letter characters is irrelevant. For example, if you enter *REDACT* in the Tag box, search results include evidence with the tag *REDACT*, *redact*, and *redaction.*

Remove Evidence from a Case

You can remove evidence from a case from the Evidence tab of the Case Details page.

1. On the Evidence tab, select the ID of the evidence you want to remove.
2. Click the Secondary Actions menu button **[...]** and select **Remove from case**.
3. In the confirmation message box, click **Remove**.

When the evidence is removed from the case, it is returned to its normal retention schedule based on the category assigned to the evidence and the date the evidence was recorded on.

Working with Evidence Folders

Evidence folders provide a way to organize evidence files. After you add evidence to a case, you can create as many folders as you need, rename folders, and add evidence to multiple folders. Evidence added to folders will also be shown in the All Evidence list.

Add a Folder to a Case

1. On the Evidence tab of the Case Details page click **Create a Folder**.

2. On the dialog box, in the **Folder Name** box, type a meaningful name for the folder, then click **Create**.

   Evidence.com creates the folder and adds it to the folder list. If any evidence files were selected when you create the folder, that evidence will be automatically added to the folder when it is created.

Rename a Folder

1. On the Evidence tab of the Case Details page, click the name of a folder.
2. Click the Secondary Actions menu **[...]** and select **Rename Folder**.
3. Type the new name in the **Name** box, then click **Rename**.

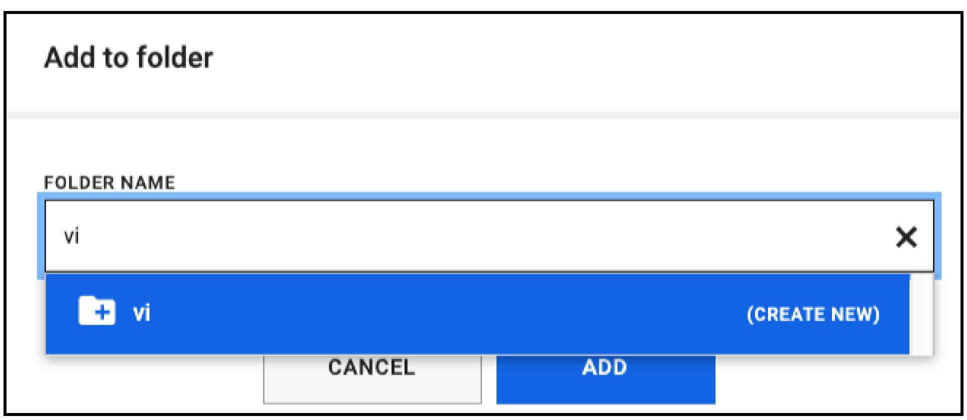
Add Evidence to a Folder

You can add the evidence that is already part of a case to any evidence folder that you need.

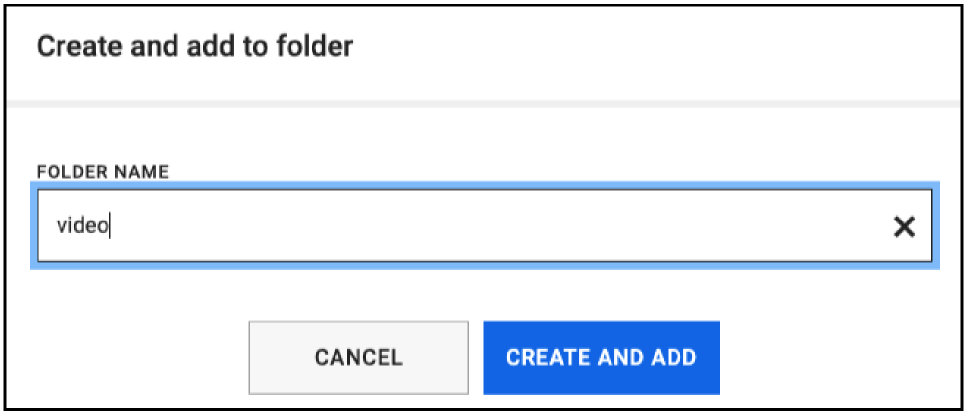
For information about adding evidence to a case, see [Add Evidence to a Case].

1. In the All Evidence section of the Evidence tab, select the check box to the left of the evidence ID of each file you want to add to a folder.
2. Above the evidence list, click **Add to Folder**.
3. In the dialog box, in the **Select Folder** list, select the folder that you want to add the evidence to, then click **Add**.

   If the folder you want to add evidence to does not exist, a new row will appear in the dialog box with an icon of a folder with a **+** symbol and a **Create New** button.



Selecting this option will change the workflow from adding evidence to a folder to creating a new folder and adding evidence to that new folder. When you click **Create and Add**, the previously selected evidence will be added to the newly created folder.



4. If you want to confirm the evidence is in the folder you added it to, click the folder name and view the evidence list.

Remove Evidence from a Folder

You can remove evidence from any evidence folder as needed.

If you need to remove evidence from a case, see Remove Evidence from a Case.

1. On the Evidence tab, click the folder that you want to remove evidence from.

   Below the evidence preview area, a list of evidence in the folder appears.

2. Select the check box for each piece of evidence that you want to remove from the folder.
3. Click the Secondary Actions menu button **[...]** and select **Remove from Folder**.
4. In the confirmation message box, click **Remove**.
5. In the message box, click **OK**.

   Evidence.com removes the selected evidence from the folder. The evidence remains in the case in the All Evidence section.

Working with Evidence in a Case

For evidence that is in a case, you can perform the actions described in this section. To learn more about working with evidence, see the Evidence section on the Axon Help Center.

Review Evidence in a Case

You can review evidence in a case on the Evidence tab. While all evidence file types can be added to Review mode, only file types that are currently supported by Evidence.com will be displayed. If the file type is unsupported, you will be prompted to download the evidence.

1. In the evidence list on the Evidence tab, select the check box of the evidence you want to review.
2. Click **Review**.

   Note: If you click **Review All** without selecting any evidence, all the evidence on the page will open in Review mode.

Evidence Bulk Actions

The bulk actions menu provides ways to categorize or organize multiple pieces of evidence. The bulk actions you can perform are the following:

- Update the metadata of evidence files.
  - **Update ID**
  - **Add Category**
  - **Update Evidence Group**
  - **Reassign**
- Manage the access to evidence.
  - **Inside my agency** — This action allows you to change the access levels, duration, and users for the selected evidence files.
  - **Outside my agency** — This action has two options:

    Add Name to External Access List: Send people outside your agency a link to the selected piece of evidence, and give them permissions to download, view the audit trail, and post notes for selected pieces of evidence. You can also set how long the link to the evidence will be active and give permission for the people to reshare the evidence.

    Email a Download Link: Send people outside your agency a link to the selected piece of evidence and set the permissions for including audit trails and a table of contents. You can also set how long the link to the evidence will be active.

  - **Restrict** — This action allows you to restrict access to the evidence to users and groups on the access control list and users in roles with the view restricted evidence permission.

- Take additional actions on evidence files.
  - **Redact** — This action only applies to video files. It will apply a full-screen blur filter to the video and create the blurred file as a child piece of evidence to the original.
  - **Download** — This allows you to download the selected evidence.
  - **Export List** — This allows you to export a list that contains information about the evidence, including ID, evidence group, owner, when the evidence was recorded, who uploaded the evidence, and the status.
  - **Remove from case**
- Manage evidence folders.
  - **Rename Folder**
  - **Delete Folder**
  - **Remove from Folder**

To use any of the bulk actions:

1. Select multiple pieces of evidence by selecting the check box to the left of the evidence ID.
2. Click the Secondary Actions menu button **[...]** in the left corner of the All Evidence section, then select an action from the drop-down list.

Download Evidence from a Case

You can download evidence included in a case from the Case Details page.

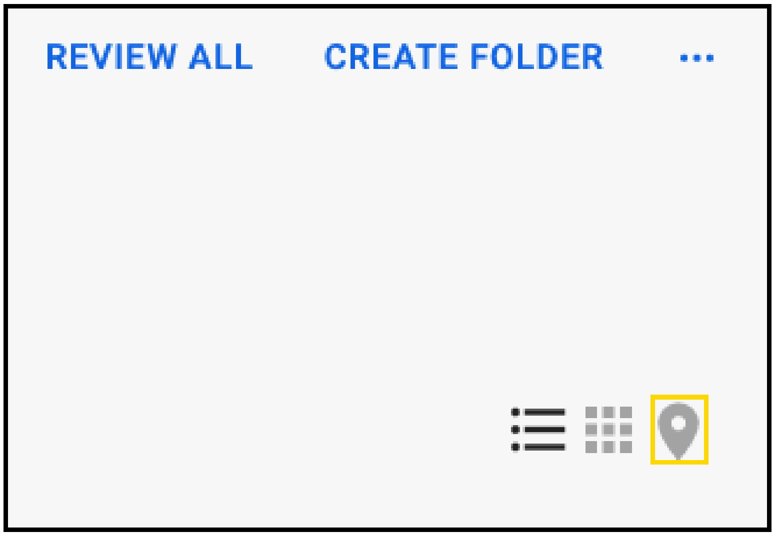
1. On the Evidence tab of the Case Details page, select the check box of the evidence files you want to download.
2. Click the Secondary Actions menu button **[...]** and select **Download**.
3. In the Configure your bulk download screen, select the download format and if you want to include the Audit Trail and Table of Contents in the download file, then click **Download**.

   The evidence files will be bundled into a file, and an email containing a download link will be sent your email address.

View a Case Map

If evidence in a case has location information, you can view the evidence in an evidence map.

- On the Evidence tab of the Case Details page, in the All Evidence section, click the map icon.



Case Evidence Map Actions

The case evidence map provides features for finding and viewing evidence location on the map.

The following table describes the basic actions that are available on the case evidence map.

Action	Steps
See information about evidence	1. Click on the icon for the evidence. Evidence.com shows information about the evidence. 2. If you want to see more information about the evidence, click **View Evidence**. The Evidence Detail page opens.
Pan	1. Position the mouse pointer over the map. 2. Click and hold the mouse button. 3. Move the mouse to pan the map. 4. Optionally, click **Redo Search in this Area** to see additional evidence in the new map view.

Action	Steps
Zoom In or Zoom Out	• In the map, click on the **+** or **–** icons to zoom in or out. Alternately, if your mouse has a mouse wheel: 1. Position the mouse pointer over the map. 2. Rotate the mouse wheel to zoom in or out. If needed, click **Redo Search in this Area** to see additional evidence in the new map view.

Cases Access Control Lists

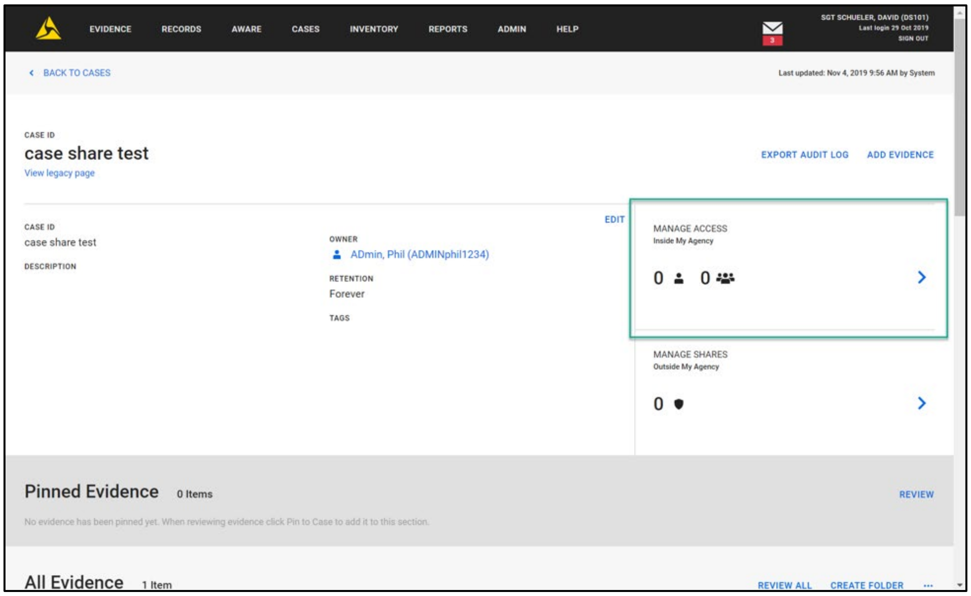
Access Lists are the workflow used to control access to cases in Evidence.com. An access list allows you to grant access to specific users and groups, as well as restrict access to only the users and groups on the access list. Each case has its own access list, so you can individually manage access and restrict cases as needed. When a user or group is added to the case access list, they are granted access to that specific case and evidence.

Default Access to Cases

The default access to a case is based on the permissions associated with the user's assigned role. To view a case, the agency administrator must grant the user the Case Management – View permission. For restricted cases, only users assigned to roles with the Access Restricted Cases permission and those on the access list are granted access to the case and evidence.

Access List Information

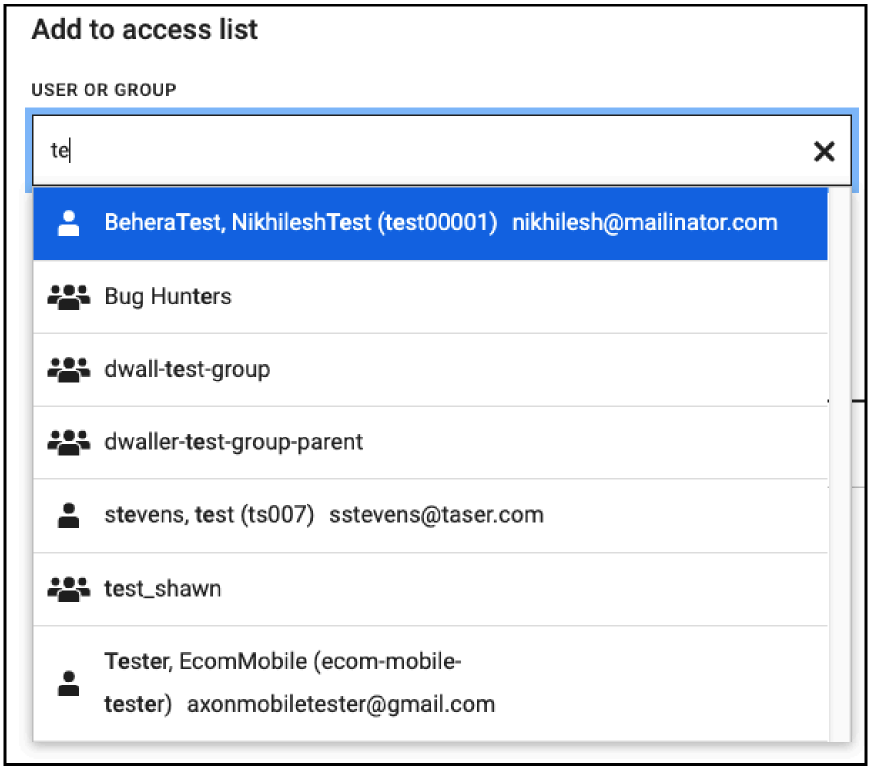
The Summary tab on the Case Details page shows how many users and groups have been granted access to that particular case.



Adding a User or Group to an Access List for a Case

1. On the Summary tab of the Case Details page, click the blue arrow on the Manage Access card.

2. In the **Add to access list** field, enter the name, email address, or badge ID of the user or groups you want to grant case access to. As you enter text, a list of matching users or groups is shown. Select the user or group you want to add to the list.



3. To add additional users or groups, repeat steps 1 and 2.

4. After selecting a user or group, select the Access Level.

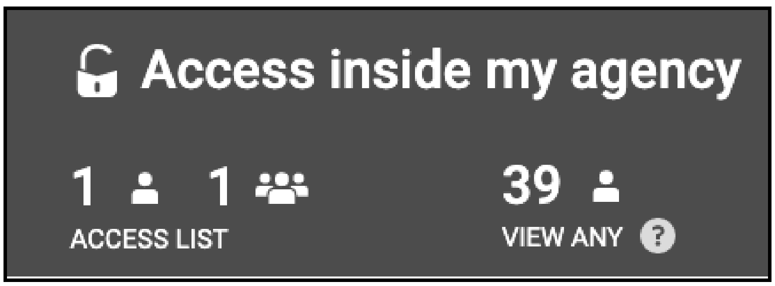
   - If **Role** is selected, the actions a user or group can take depends on the permissions associated with their assigned role.
   - If **View** is selected, the user or group can only view the case.

5. From the **Duration** list, select the period of time the user can access the case.

   The default value is Until Removed, which means the user or group can access the case until they are removed from the access list.

6. Click **Add**.

The Manage Access page will show the updated number of users and groups that have access to the case.



7. Repeat steps 2 and 3 to add another user or group.

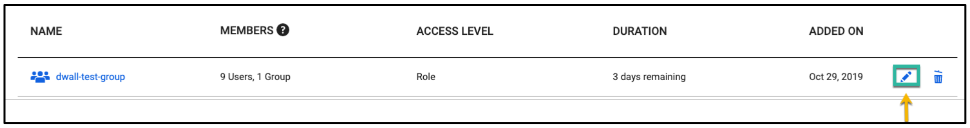
8. After all users and groups have been added, click **X** to return to the Cases Detail page.

Modifying the Case Access List

You can edit the access level or duration permissions for a user or group.

1. On the Summary tab, click the blue arrow on the Manage Access card.

2. In the list of access list members, find the user or group you want to edit and click the (edit) icon.



3. Make your changes to the Access Level or Duration settings, then click **Save**.

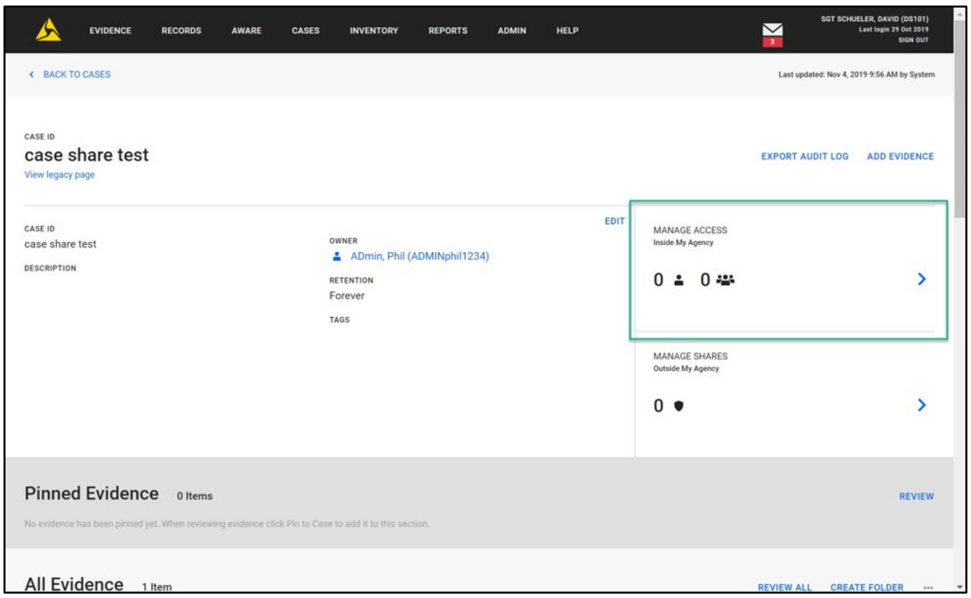
4. After all users and groups have been edited, click **X** to return to the Cases Detail page.

Restricting Access to a Case

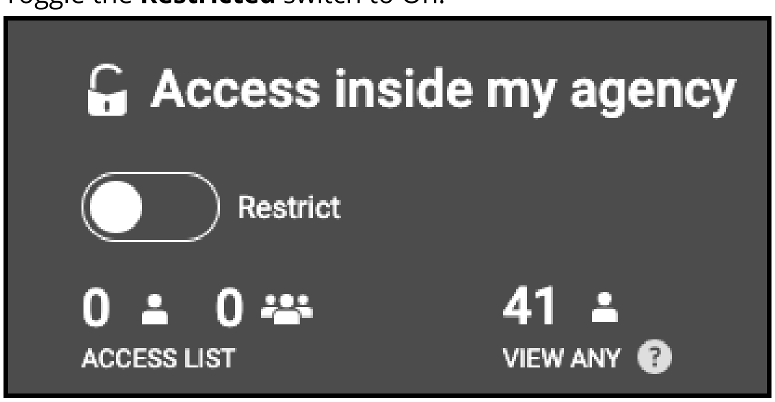
When a case is restricted, only users assigned to roles with the Access Restricted Cases permission and those on the access list are granted access to the case and evidence.

To restrict a case:

1. On Summary tab of a Case Details page, click the **Manage Access** card.



2. Toggle the **Restricted** switch to On.



3. Click **Restrict** in the Restrict Case confirmation window.

   Note: This does not restrict the evidence in the case, only access to the case itself.

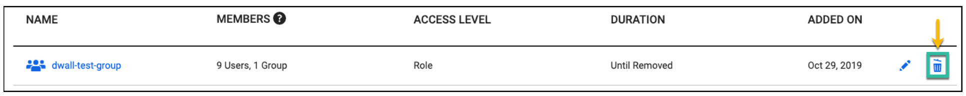
The user that restricted the case is automatically added to the access control list in order to prevent users from locking themselves out of a case. All restricted cases must have at least one user or group on the access list at all times.

Remove a User or Group from an Access List

You can remove a user or group from an access list for a case.

1. On the Summary tab of the Case Details page, click the blue arrow on the Manage Access card.

2. In the list of access list members, find the user or group you want to remove from the access list and click the (remove) icon.



3. Click **Remove**.

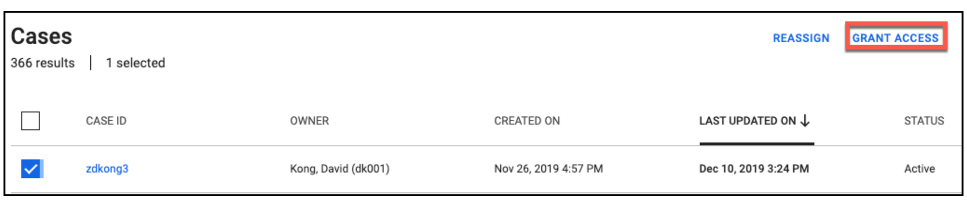
4. After all users and groups have been removed, click **X** to return to the Cases Detail page.

Adding Users to Access Lists for Multiple Cases

You can add users or groups to the access lists for multiple cases at one time.

1. Using the Cases Search page, find and select the cases you want to grant access to.

2. Click **Grant Access**.



3. Enter the name, email address, or badge ID of the user or group you want to grant case access to. As you enter text, a list of matching users or groups is shown.

4. Click **Share**.

   Note: You cannot set the Role or Duration settings for multiple cases at one time. Those settings can only be set on individual cases.

Sharing Cases to Partner Agencies

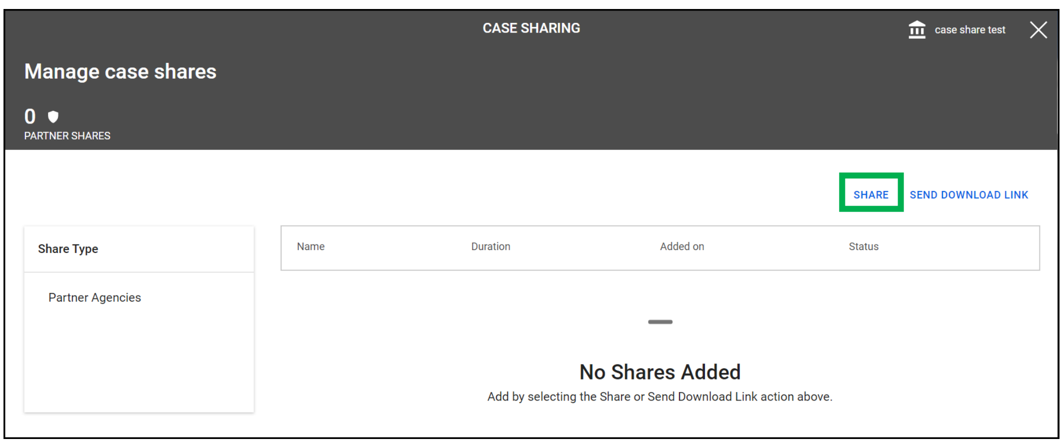
You can give partner agencies access to a case two ways:

- Sharing the case.
- Sending a download link to a file with the case information. The link can be used by anyone who receives it, not just users in a partner agency.

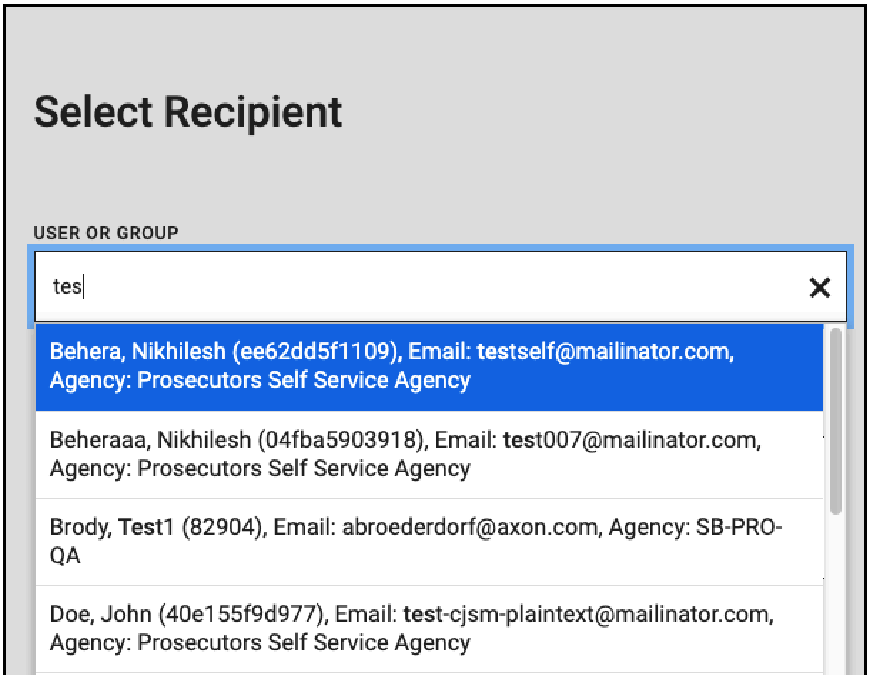
The Case Details page shows how many partner agencies the case has been shared with.

Sharing a Case with a Partner Agency

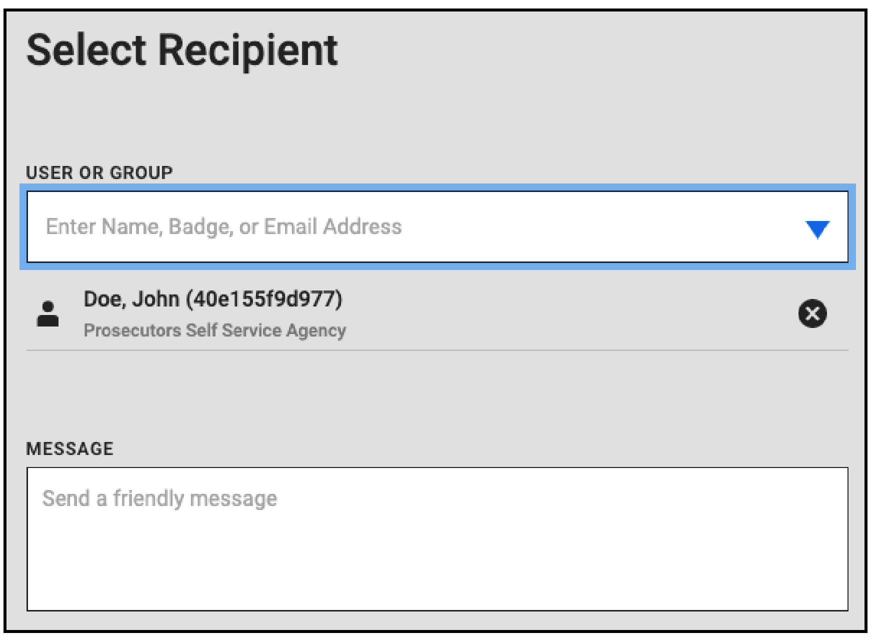
1. On the Case Details page, click the blue arrow on the Manage Shares card.
2. On the Case Sharing page, click **Share**.



3. In the **User or Group** field, enter the name, badge ID, or email address of the user or group you want to share the case with. As you enter text, a list of matching users or groups is shown.



Optional: Add a message. This message will be included in the email notification the user or group receives when you share the case to them.



4. Click **Next**.

5. On the Choose Options step of the Share Case workflow, select any additional information you want to share, then click **Next**.

    - Selecting **Notes** will share all of the notes on the case and evidence in the case with the partner agency.

- Selecting **Clips** will share all of the clips derived from evidence in the case with the partner agency.
- Selecting **Markers** will share all of the markers included on evidence in the case with the partner agency.
- Selecting **Audit Trails** will share all of the audit events for the case and evidence in the case with the partner agency.

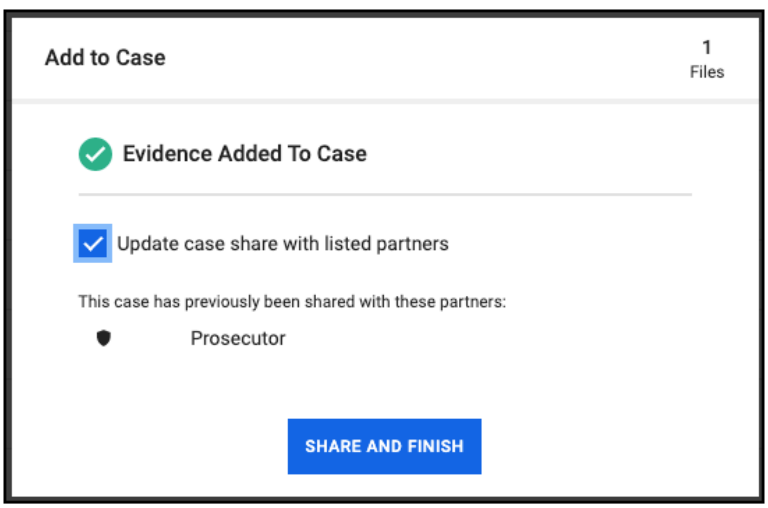
6. Review that the information is correct, then click **Share**.
7. Evidence.com will begin creating an exact copy of the case and evidence in the case in the partner agency's instance of Evidence.com. The user or group the case was shared to will be notified via email once the share has completed successfully.
8. After you have finished sharing, click **X** to return to the Cases Detail page.

Updating a Shared Case

If you add evidence to a case that has already been shared to a partner agency, you can choose to update the case share with that new evidence. The newly added evidence will be added to the partner agency's copy of the case, and they will receive an email notifying them that new evidence has been added. You can update a shared case when you add new evidence, or at a later date.

Update a Shared Case when Adding Evidence:

1. After adding evidence to a case, select the **Update case share with listed partners** check box in the Evidence Added to Case confirmation window.

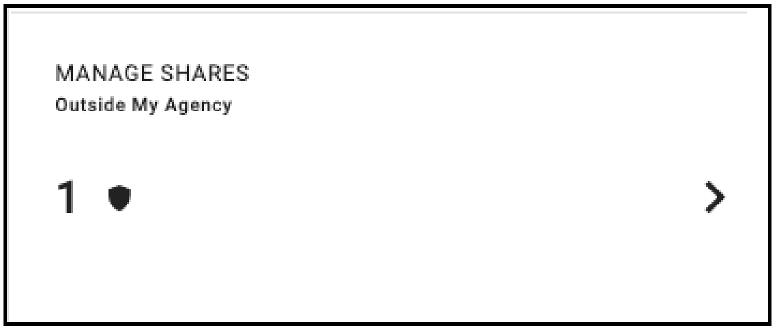


2. Click **Share and Finish**.

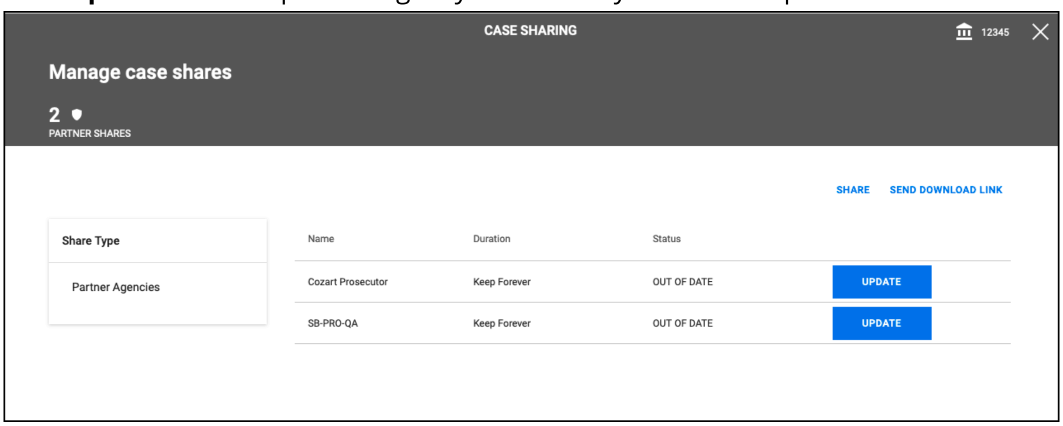
Update a Shared Case at a Later Date

If you choose not to update the case shares when evidence is added to the case, you may still do so at a later time by accessing the manage shares card from the Case Details page.

1. On the Summary tab of the Case Details Page, click the Manage Shares tile.



2. Click **Update** for each partner agency case share you want to update.

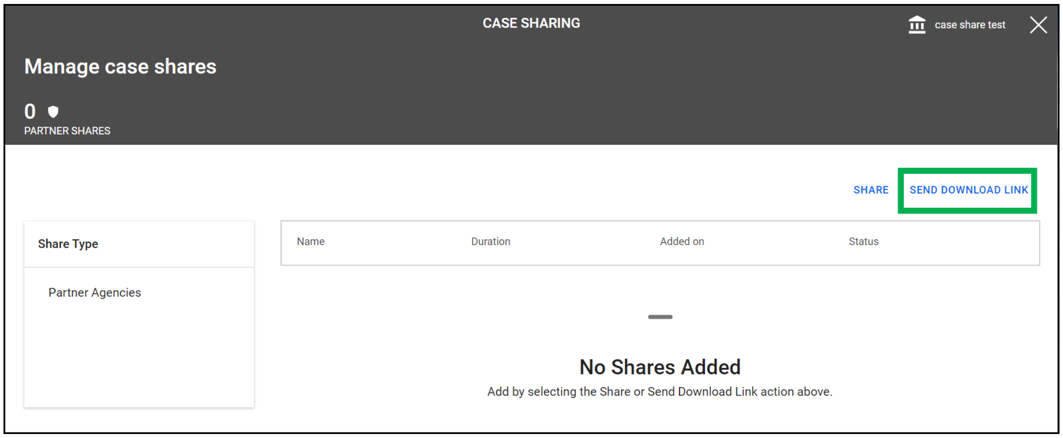


All evidence that was added to the case since the share was last updated will be copied into the partner agency's copy of the case. Once this copy is completed, the case owner will be notified by email that new evidence has been added to their case.

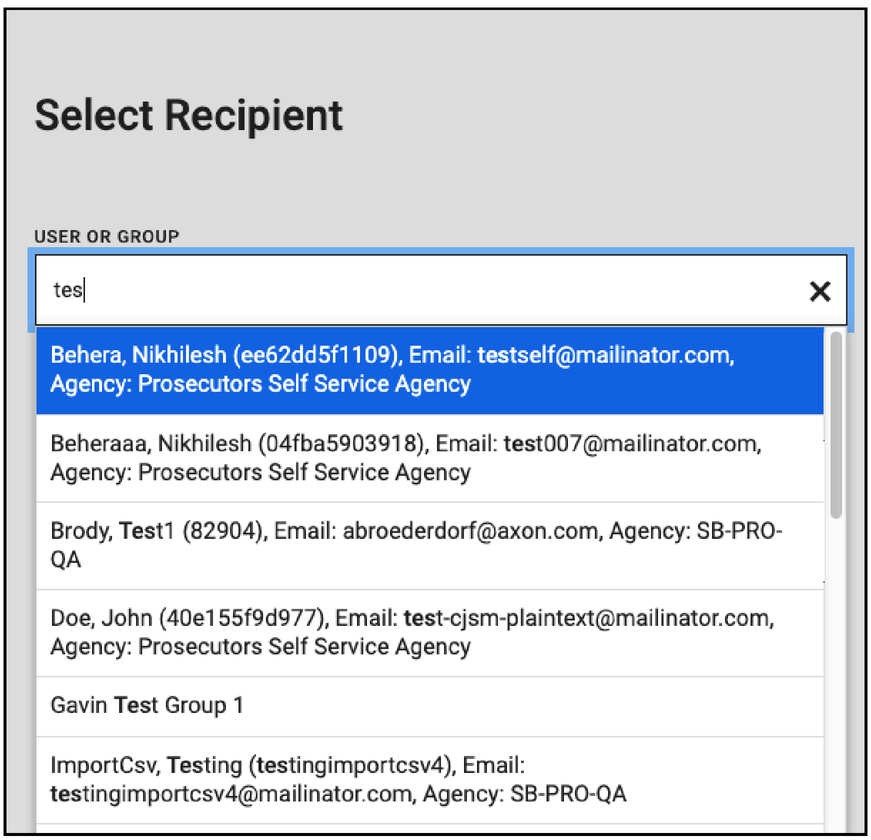
Send a Download Link

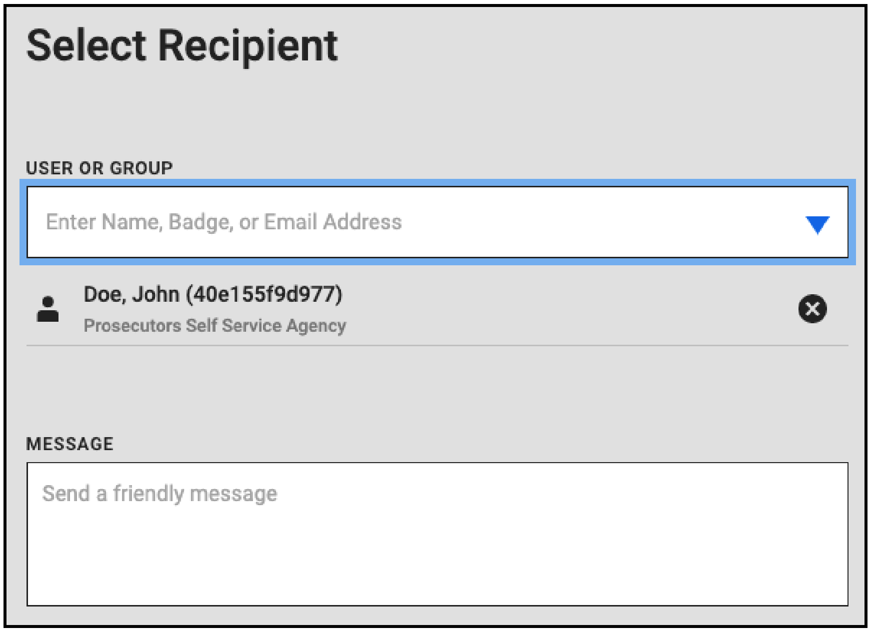
1. On the Case Details page, click the blue arrow on the Manage Shares card.

2. On the Case Sharing page, click **Send Download Link**.



3. On the Select Recipient page, enter the name, email address, or badge ID of the user you want to grant case access to. As you enter text, a list of matching users is shown. You may select a user from the suggested results or enter an email address to send the download link to.





4. Click **Next**.

On the Choose Options page, select any additional information to include, the file package type, set the number of days the download link will be active, and then click **Next**.

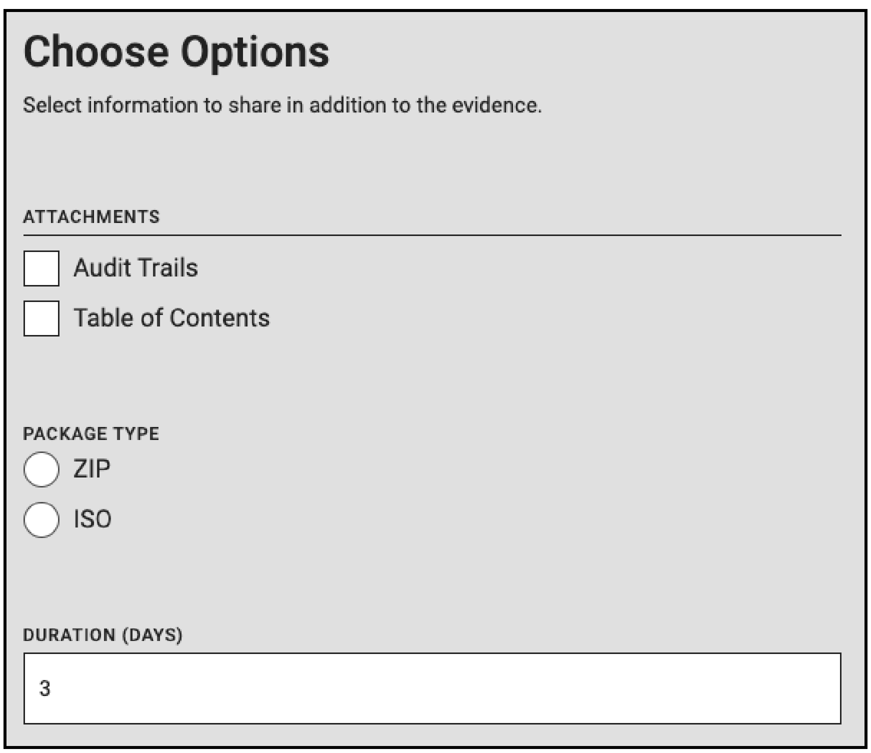


Table of Contents: When selected, a Microsoft Excel spreadsheet will accompany the download, and contain the following fields: File Name, Evidence ID, Evidence Title, File

Type, File Size, Evidence Duration, Date Recorded, Uploader-First Name, Uploader-Last Name, Uploader-Badge ID, Assignee-First Name, Assignee-Last Name, Assignee-Badge ID, and Agency Name.

5. Review that the information is correct, then click **Share**.

6. A link for downloading the file is sent to the user or email you added. The files will only be available until the duration you specified expires.

   After you have finished sharing, click **X** to return to the Cases Detail page.