



INTEGRITY **COUNTS**

# Training Guide

Case Manager: Manager/Investigator View

# Find It Fast

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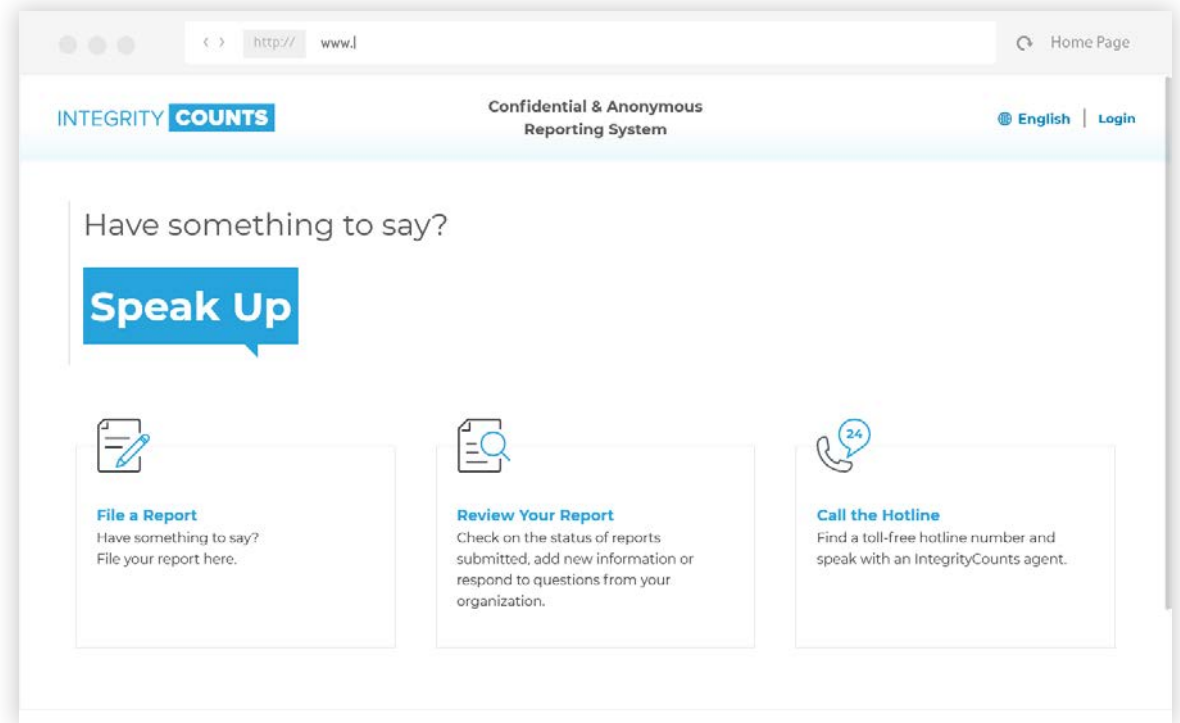


INTEGRITY **COUNTS**

## **Case Manager: Manager View**

# Case Manager: Manager View

## Home Page



Using the provided unique URL, Managers/Investigators will arrive on their landing page. From here, Managers/Investigators can click **Login** in the upper right corner of the screen.

# Case Manager: Manager View

## Log In

INTEGRITY **COUNTS**

Welcome to  
*IntegrityCounts*

A robust case management and insights platform that helps your organization better manage its ethics and compliance reporting program.

Please Sign In

Username

Password

Remember my login

Login

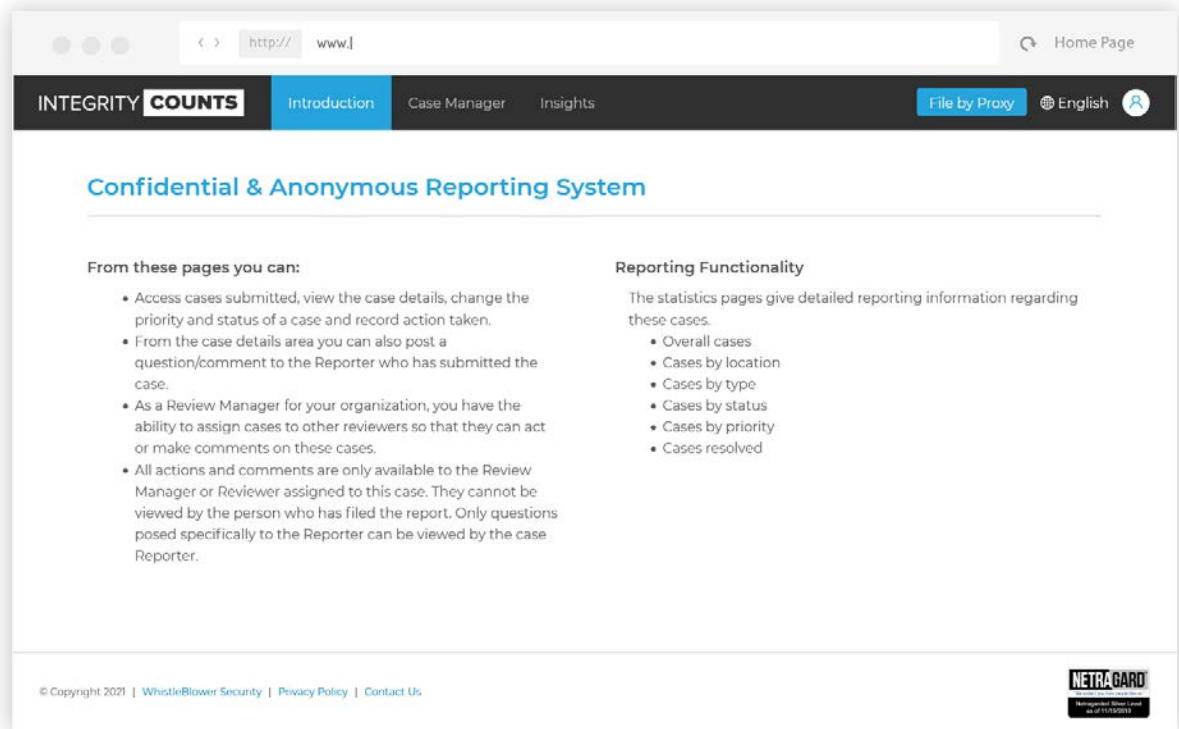
[Forgot your password?](#)

Use Single Sign-On

Managers/Investigators should enter their ***Username*** (email address) and ***Password*** and click the ***Login*** button to proceed.

# Case Manager: Manager View

## Introduction



The screenshot shows a web browser window displaying the 'Introduction' page of the Integrity Counts Case Manager application. The browser's address bar shows 'http:// www.'. The page header includes the 'INTEGRITY COUNTS' logo, navigation links for 'Introduction', 'Case Manager', and 'Insights', and a 'File by Proxy' button. The main content area is titled 'Confidential & Anonymous Reporting System' and is divided into two columns. The left column, 'From these pages you can:', lists four bullet points about case management capabilities. The right column, 'Reporting Functionality', lists five categories of reporting statistics. The footer contains copyright information and a 'NETSCAPE' logo.

INTEGRITY COUNTS Introduction Case Manager Insights File by Proxy English

### Confidential & Anonymous Reporting System

**From these pages you can:**


- Access cases submitted, view the case details, change the priority and status of a case and record action taken.
- From the case details area you can also post a question/comment to the Reporter who has submitted the case.
- As a Review Manager for your organization, you have the ability to assign cases to other reviewers so that they can act or make comments on these cases.
- All actions and comments are only available to the Review Manager or Reviewer assigned to this case. They cannot be viewed by the person who has filed the report. Only questions posed specifically to the Reporter can be viewed by the case Reporter.

**Reporting Functionality**

The statistics pages give detailed reporting information regarding these cases.

- Overall cases
- Cases by location
- Cases by type
- Cases by status
- Cases by priority
- Cases resolved

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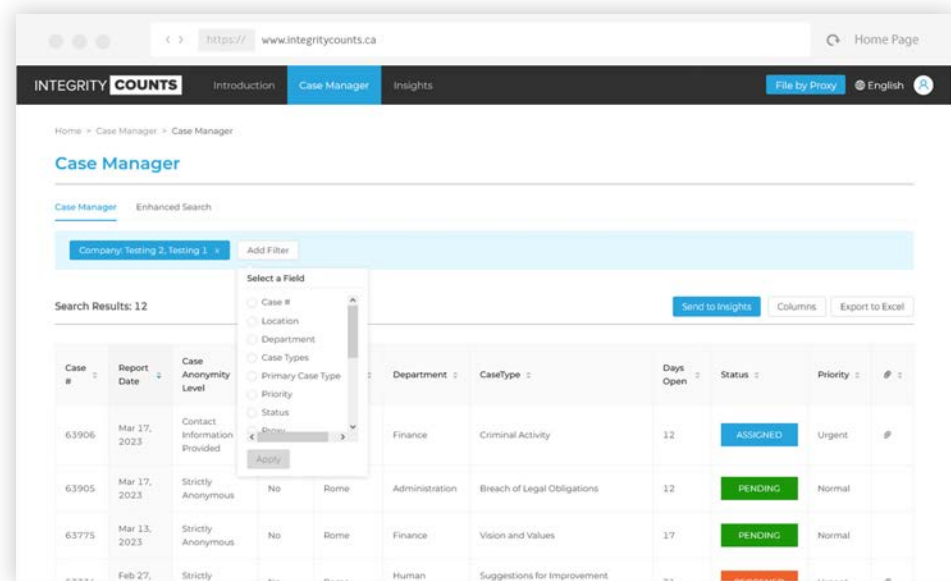
Once the Manager/Investigator has logged in, they will reach the Introduction page of the Case Manager application. This page is an overview that highlights what the Manager/Investigator can do in the Case Manager application.

The Manager/Investigator can also click the **File by Proxy** button located in the upper right of the screen, which allows them to file a case on behalf of a Reporter.

The Case Manager application is available in three languages: French, Spanish and English. The Manager/Investigator can access their profile by clicking the person icon in the upper right corner.

# Case Manager: Manager View

## Case Search



By selecting **Case Search** from the top menu, the Manager/Investigator can use filters to narrow down the search results.

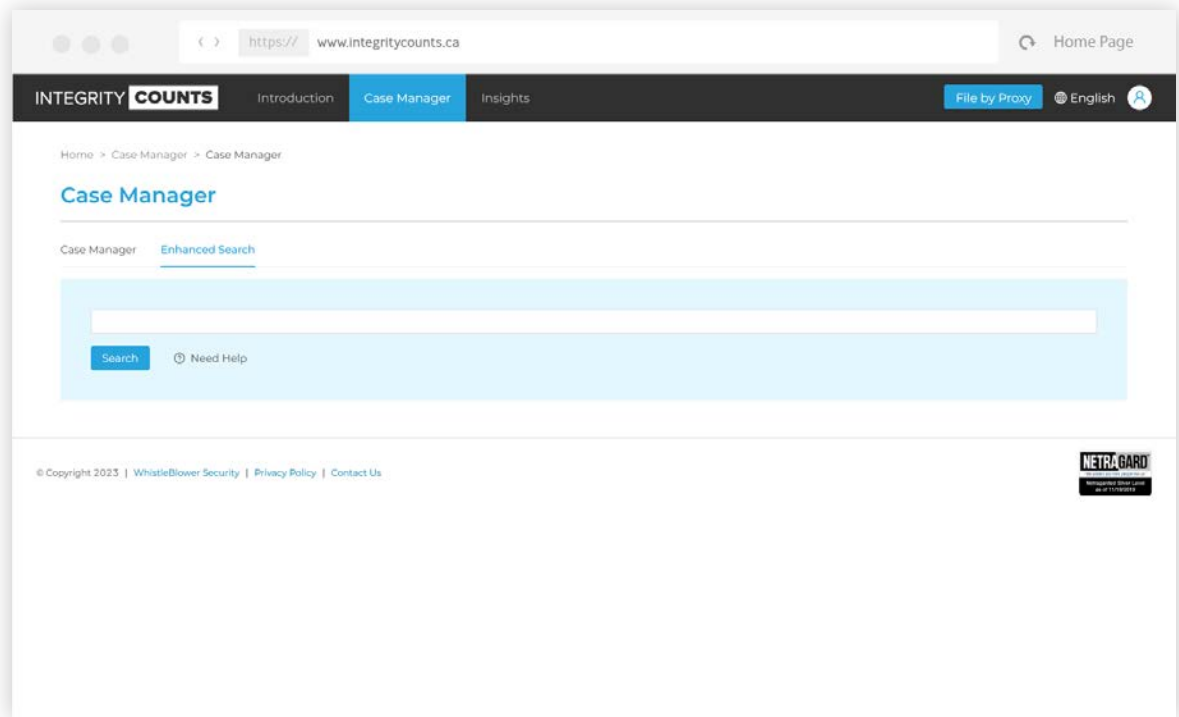
Managers have the ability to view all cases, while Investigators only have the ability to view cases that they have been assigned to. The exception is that Managers/Investigators will not be able to view any cases where they have been listed by the Reporter as a Restricted Manager or being directly/indirectly involved in the case.

Various filters are provided in the area above the results, such as date range and case type.

Clicking on the **Columns** button can change which data is being displayed in the grid. Clicking the **Export to Excel** button will export the data in a CSV format. The filtered results view can be sent to **Insights** to view the data visually and in different categories.

# Case Manager: Manager View

## Enhanced Case Search



Managers/Investigators can also perform a more broad search of keywords found in cases, by using the *Enhanced Search* function. The tab is just to the right of the default *Case Search* tab.

The search bar can be used similar to Google, to search for multiple keywords without needing to specify *AND* or *OR*.



# Case Manager: Manager View

## Case Details - Information

The screenshot displays the Integrity Counts Case Manager interface. The top navigation bar includes the logo, 'Introduction', 'Case Manager', and 'Insights' tabs. A 'File by Proxy' button and 'English' language selector are also present. The left sidebar lists various case management options such as 'Information', 'Description', 'Restricted Managers', 'Message Reporter', 'Attachments', 'Case Activity', 'Investigation Team', 'Task Assignment', 'Internal Messages', 'Actions', 'Activity Log', and 'Export Case'. The main content area shows the 'Case Details - 63906' page, which is marked as 'CLOSED'. Key information is displayed in a summary row: Priority: Urgent, Proxy: No, Days Open: 13, and Updated: 2023/03/30 8:07 PM. Below this, the 'Information' section is divided into 'Details' and 'Contact Information'. The 'Details' section includes fields for Client Name (Testing 2), Date of Occurrence (March 17, 2023 - March 17, 2023), Reported Date (March 17, 2023 4:49 PM), Report Closed On (March 30, 2023 8:07 PM), Case Source (Web), and Location (Spain). The 'Contact Information' section includes Reporter Name (Not provided), Employee Number (Not provided), Contact Number (Not provided), E-mail Address (myemail@gmail.com), Best way to contact (EMAIL), and Notify (Yes).

Upon selecting a case from the search results, you will be brought to the **Information** page of the **Case Details** section. The information at the top of the main content area is visible at all times, and contains useful information about the case and its activity, such as **Case Number**, **Priority** and **Days Open**.

All the information in the main content area is verbatim what the reporter submitted. In this information section, there are three areas that can be edited. They are the **Client Name** (ie. if your company has multiple subsidiaries or divisions), **Location** and **Department**.

These areas can be edited by clicking the blue edit symbol, selecting from the drop down and clicking save.

# Case Manager: Manager View

## Case Details - Description

The screenshot displays the Integrity Counts Case Manager interface. The browser address bar shows 'https://www.integritycounts.ca'. The navigation menu includes 'Introduction', 'Case Manager', and 'Insights'. The 'Case Manager' section is active, with a 'File by Proxy' button and 'English' language selection. The left sidebar lists various case management options, with 'Description' selected. The main content area shows the 'Case Details - 63906' view, which is marked as 'CLOSED'. Key details include: Priority: Urgent, Proxy: No, Days Open: 13, and Updated: 2023/03/30 8:07PM. A '+ Add Tag' button is visible. The 'Description' section contains the text 'Test'. Below this are sections for 'Case Summary' (with a link icon), 'Case Types' (with a link icon), and 'Criminal Activity' (with a dropdown arrow). Under 'Criminal Activity', 'Fraud and Embezzlement' is selected. The 'Additional Information' section contains the question 'Has the case been reported to a supervisor in the past?' with the answer 'No'.

By selecting **Description** from the left menu, Managers/Investigators can view the case description and additional details provided by the Reporter.

The information under **Description** and **Additional Information** headings are verbatim to what the Reporter input and cannot be edited.

**Case Summary** and **Case Types** can be edited by the Managers/Investigators to better represent the case and categorize the case report for reporting purposes.

The + **Add Tag** feature allows the Manager/Investigator to add a tag to a case. This feature is often used to organize cases in greater detail so that case report trends can be tracked more closely. Tags are fully editable by the Manager/Investigator.

# Case Manager: Manager View

## Case Details - Restricted Managers

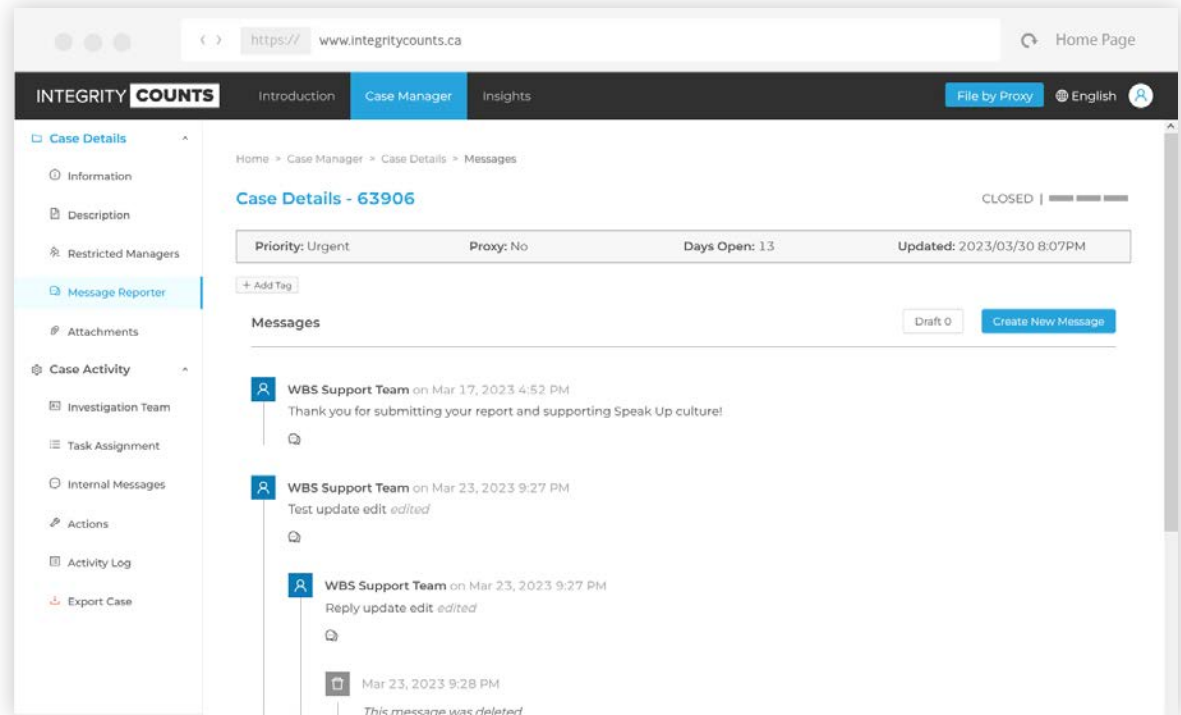
The screenshot displays the Integrity Counts Case Manager interface. The browser address bar shows <https://www.integritycounts.ca>. The navigation menu includes 'Introduction', 'Case Manager', and 'Insights'. The 'Case Manager' section is active, showing a sidebar with options: Information, Description, Restricted Managers (selected), Message Reporter, Attachments, Case Activity, Investigation Team, Task Assignment, Internal Messages, Actions, Activity Log, and Export Case. The main content area shows 'Case Details - 63906' with a status of 'ASSIGNED'. A summary bar indicates 'Priority: Urgent', 'Proxy: No', 'Days Open: 13', and 'Updated: 2023/03/23 9:31PM'. Below this is a table for 'Restricted Managers' with columns for Name, Reason, and Action. The table is currently empty, with a '+ Add Tag' button and an 'Add' button in the Action column.

From the left menu, selecting **Restricted Managers** will bring up a list of Managers/Investigators that the Reporter has indicated were directly or indirectly involved with the case. Any Managers/Investigators listed here will NOT receive any notifications nor be able to view the report.

However, if the Reporter accidentally listed a Manager/Investigator as a Restricted Manager, any unlisted Manager or any Backup Manager can remove them as a Restricted Manager, thus allowing them access to the case.

# Case Manager: Manager View

## Case Details - Message Reporter (View)



The screenshot displays the Integrity Counts Case Manager interface. The top navigation bar includes the logo, 'Introduction', 'Case Manager', and 'Insights' tabs. A 'File by Proxy' button and a language selector are also present. The left sidebar menu is expanded to show 'Message Reporter' under the 'Case Details' section. The main content area shows the case details for 'Case Details - 63906', which is marked as 'CLOSED'. Key information includes 'Priority: Urgent', 'Proxy: No', 'Days Open: 13', and 'Updated: 2023/03/30 8:07PM'. Below this, there is a 'Messages' section with a 'Draft: 0' indicator and a 'Create New Message' button. The message history shows three entries from the 'WBS Support Team' on March 17, 2023, and March 23, 2023, with the most recent message being a reply that has been edited. A deleted message is also visible at the bottom.

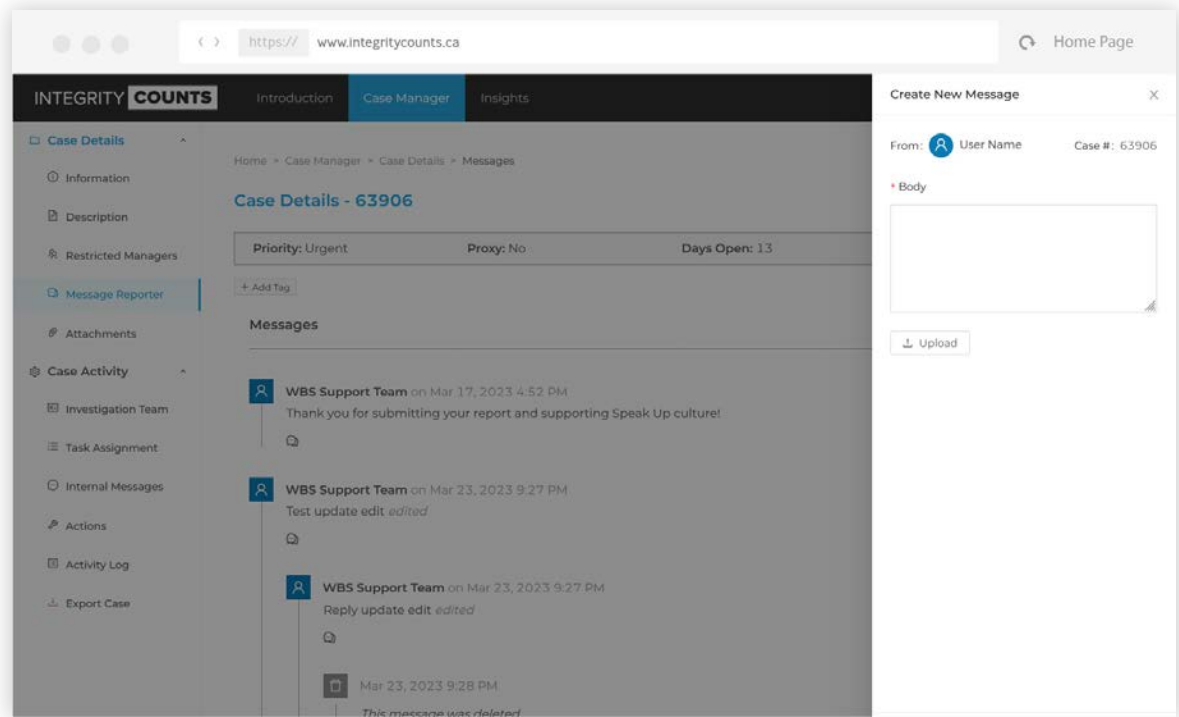
From the left menu, selecting **Message Reporter** allows the Manager/ Investigator to message the Reporter directly and the Reporter's response will also be displayed here.

Once the message is created, the Manager/Investigator can make additional edits to it or delete it.

The created message can also include attachments that can be added after creation and can also be deleted if needed.

# Case Manager: Manager View

## Case Details - Message Reporter (Create)



By clicking on the **Create New Message** button in the upper right, the Manager/ Investigator will be presented with an area in which to compose their message. Files can be attached here as well, if necessary.

The new message can be saved as a draft by clicking the **Save Draft** button, or sent immediately upon completion by clicking the **Submit** button.

# Case Manager: Manager View

## Case Details - Attachments

The screenshot displays the Integrity Counts Case Manager interface. The left sidebar menu is expanded to show the 'Attachments' section. The main content area shows the case details for Case 63906, including its status (CLOSED), priority (Urgent), proxy status (No), days open (1.3), and last updated time (2023/03/30 8:07PM). Below this, there is an 'Informational Notes' section with a warning icon and text: 'Attachments uploaded below can only be viewed by the investigation team. To send a message to the reporter, attach directly to the message in "message reporter".' The 'Attachments' section features a table with the following data:

Date Uploaded	File Name	Uploaded By	Attached To
Mar 30, 2023	Ethicontrol tier list.png	WBS Support Team	Case
Mar 30, 2023	All Voices.png	WBS Support Team	Message
Mar 23, 2023	SG2-Canyon Lights Brownies - Nov 23, 2022 Indra Masek.pdf	WBS Support Team	Task

From the left menu, selecting **Attachments** will display any attachments uploaded from the Reporter and Manager/Investigator.

Attachments from the Reporter will have been uploaded when the case was submitted or through messaging. Any attachments from the Manager/Investigator will have been uploaded directly into the **Attachments** section or from sending an attachment through messaging.

Only attachments sent through messaging the Reporter will be seen by the Reporter; all other attachments uploaded by the Manager/Investigator will only be viewable by the Manager/Investigator with access to the case.

# Case Manager: Manager View

## Case Activity - Investigation Team

The screenshot displays the Integrity Counts Case Manager interface. The left sidebar shows the 'Case Activity' section expanded, with 'Investigation Team' selected. The main content area shows the details for Case Activity 63906, which is closed. The case has a priority of 'Urgent', is not a proxy case, has been open for 13 days, and was last updated on 2023/03/30 at 8:07 PM. Below the case details, there is an 'Informational Notes' section with a note: 'Assign Investigators to this case by selecting from the drop down below.' The 'Investigation Team' section contains a table with two columns: 'Name' and 'Action'. The 'Name' column has a dropdown menu, and the 'Action' column has 'Add' and 'Remove' buttons.

Name	Action
<input type="text"/>	<button>Add</button>
User Name	<button>Remove</button>

Under the **Case Activity** section in the left menu, selecting *Investigation Team* allows a Manager to assign and remove Investigators to the case.

# Case Manager: Manager View

## Case Activity - Internal Messages

The screenshot displays the Integrity Counts Case Manager interface. The top navigation bar includes the logo, 'Introduction', 'Case Manager', and 'Insights' tabs, along with a 'File by Proxy' button and a user profile icon. The left sidebar menu is expanded to show 'Internal Messages' under the 'Case Activity' section. The main content area shows the details for 'Case Activity - 63906', which is marked as 'CLOSED'. Key information includes 'Priority: Urgent', 'Proxy: No', 'Days Open: 13', and 'Updated: 2023/03/30 8:07PM'. Below this, there is an 'Internal Messages' section with a 'Draft 0' indicator and a 'Create New Message' button. The message list shows two messages from the 'WBS Support Team' on Mar 23, 2023, 9:30 PM. The first message is 'test update edit edited' and the second is 'reply update edit edited'. A third entry shows a deleted message: 'Mar 23, 2023 9:31 PM | This message was deleted'.

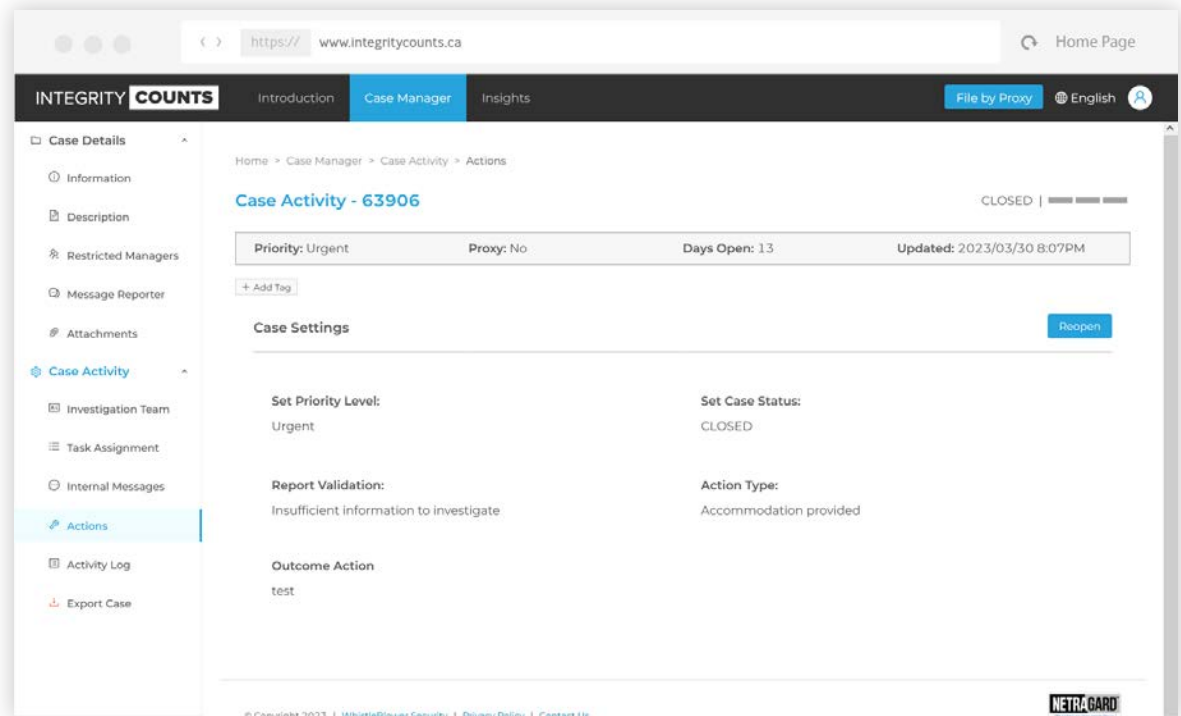
Selecting *Internal Messages* from the left menu, allows Managers/Investigators to message and communicate with others on the Investigation Team.

Messages can be created (*click Create New Message button*), saved as drafts and have files attached to them similar to the *Case Details > Message Reporter* section.



# Case Manager: Manager View

## Case Activity - Actions



The screenshot displays the Integrity Counts Case Manager interface. The top navigation bar includes the logo, 'Introduction', 'Case Manager', and 'Insights' tabs, along with a 'File by Proxy' button and a language selector set to 'English'. The left sidebar menu is expanded to show 'Case Activity', with 'Actions' selected. The main content area shows the 'Case Activity - 63906' page, which is currently 'CLOSED'. Key details include: Priority: Urgent, Proxy: No, Days Open: 13, and Updated: 2023/03/30 8:07PM. Below this, there is a 'Case Settings' section with a 'Reopen' button. The settings are organized into two columns: 'Set Priority Level' (Urgent), 'Set Case Status' (CLOSED), 'Report Validation' (Insufficient information to investigate), and 'Action Type' (Accommodation provided). An 'Outcome Action' field contains the text 'test'. The footer of the page includes a copyright notice for 2023 and the 'NETRAGARD' logo.

From the left menu, selecting **Actions** allows the Managers/Investigators to modify various case specific settings. For example, Managers/Investigators can set a priority (*select an option from the dropdown*) and change the case status.

When the case status is set to **CLOSED**, the case status will open three additional fields that allow the Manager/Investigator to provide more details on actions taken.

Selecting **Export Case** from the left menu, will take all of the data and attachments from the case and combine it into an archive (*ZIP*) file for download.



INTEGRITY **COUNTS**

**Insights**

# Insights

## Insights

The final section of the application is *Insights* which can be selected from the top navigation menu, just to the right of *Case Manager*.

Managers can use the filters, such as date range/period, to view the case data visually. They will be able to see all cases, except for those where a Reporter has listed them as being a Restricted Manager. After creating their filtered view, they can send this to the *Case Manager* search to view the data in a grid format.

Lastly, the charts displayed in the **Insights** section are all clickable to allow the Manager to be able to drill down into the data. However, if a single case type is selected, other cases will show that are attached to that particular case.

