# INTEGRITY COUNTS

# Training Guide

Case Manager: Manager/Investigator View

# Find It Fast

## Table of Contents
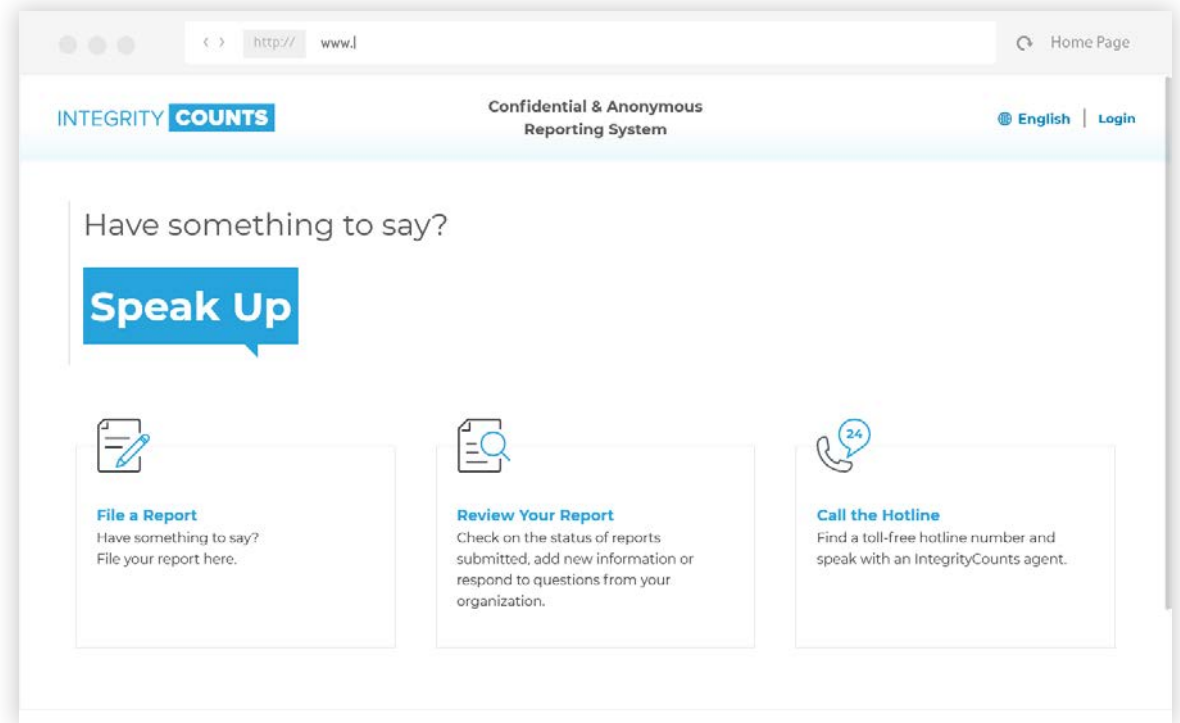
INTEGRITY COUNTS

# 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
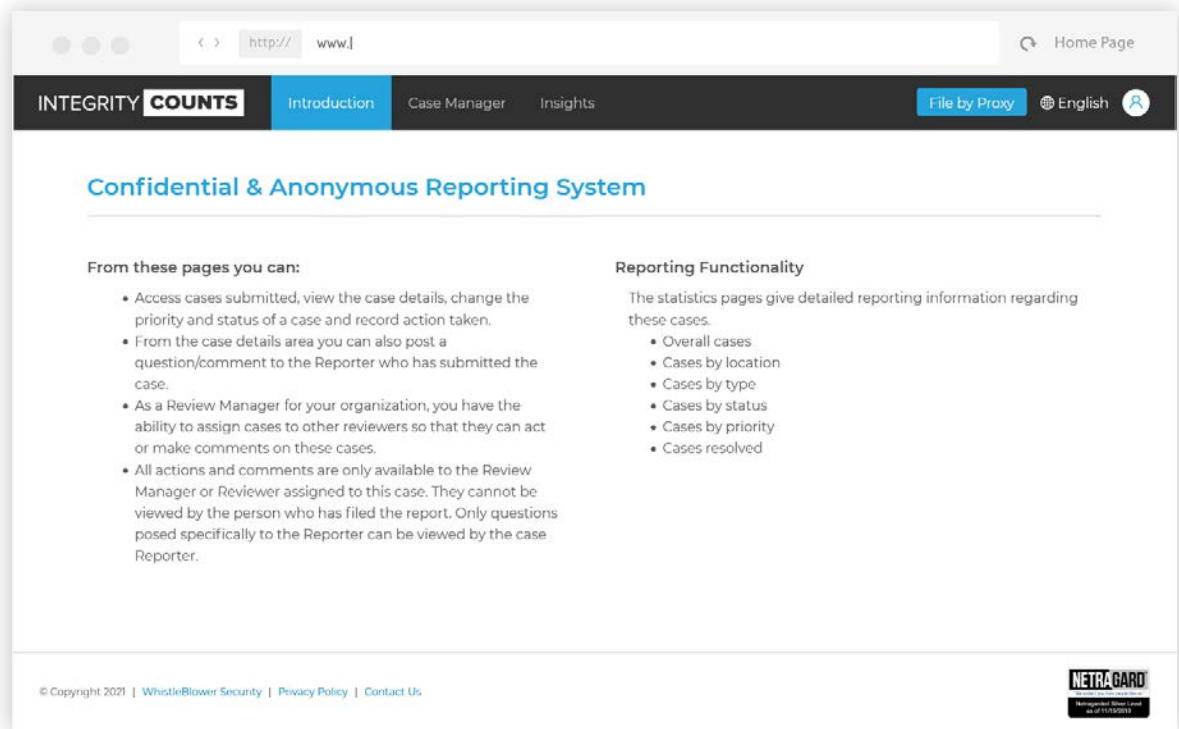
# Log In



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

INTEGRITY COUNTS

# Case Manager: Manager View

## Introduction



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 Manger 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
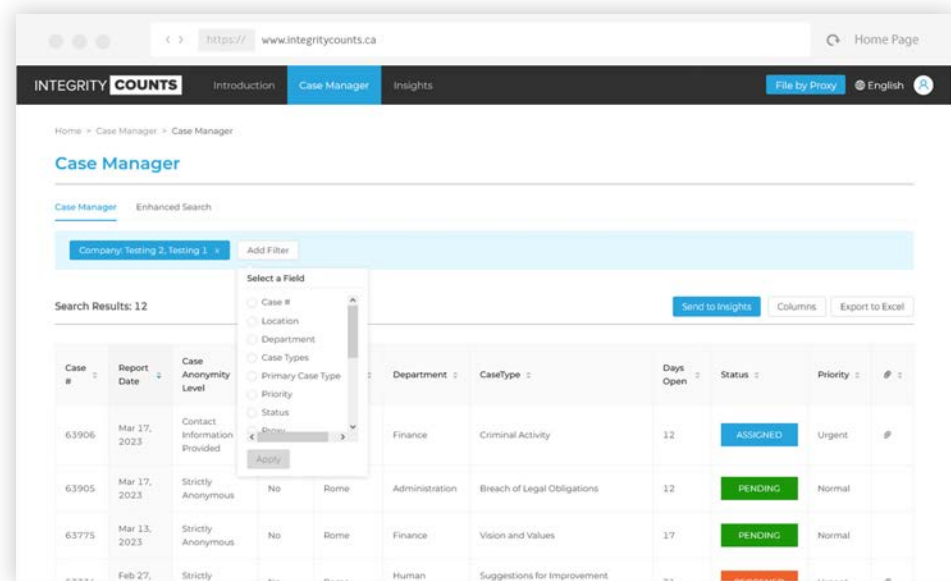


By selecting *Case Search* from the top menu, the Manager/Investigator can use filters to narrow down the search results.

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
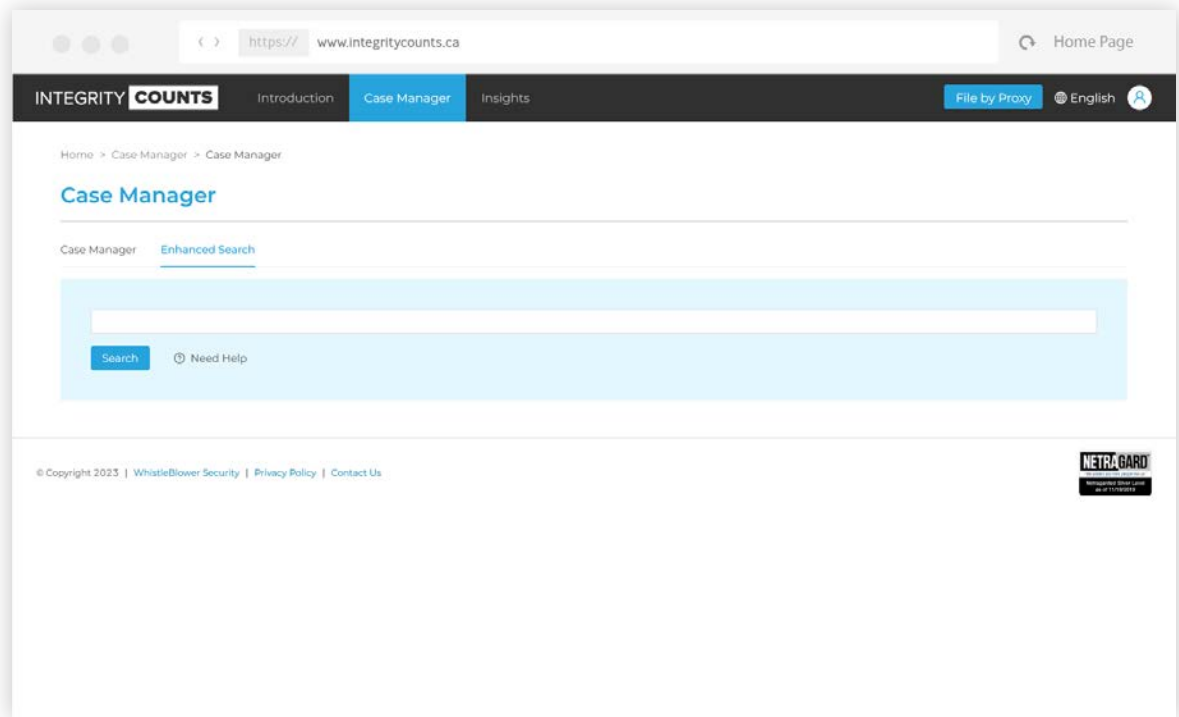


Managers/Investigators can also perform a more broad search of keywords found in cases, by using the **Enhanced Search** function. The tab is just to the right of the default **Case Search** tab.

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



Upon selecting a case from the search results, you will 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.

INTEGRITY COUNTS

# Case Manager: Manager View

## Case Details - Description



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
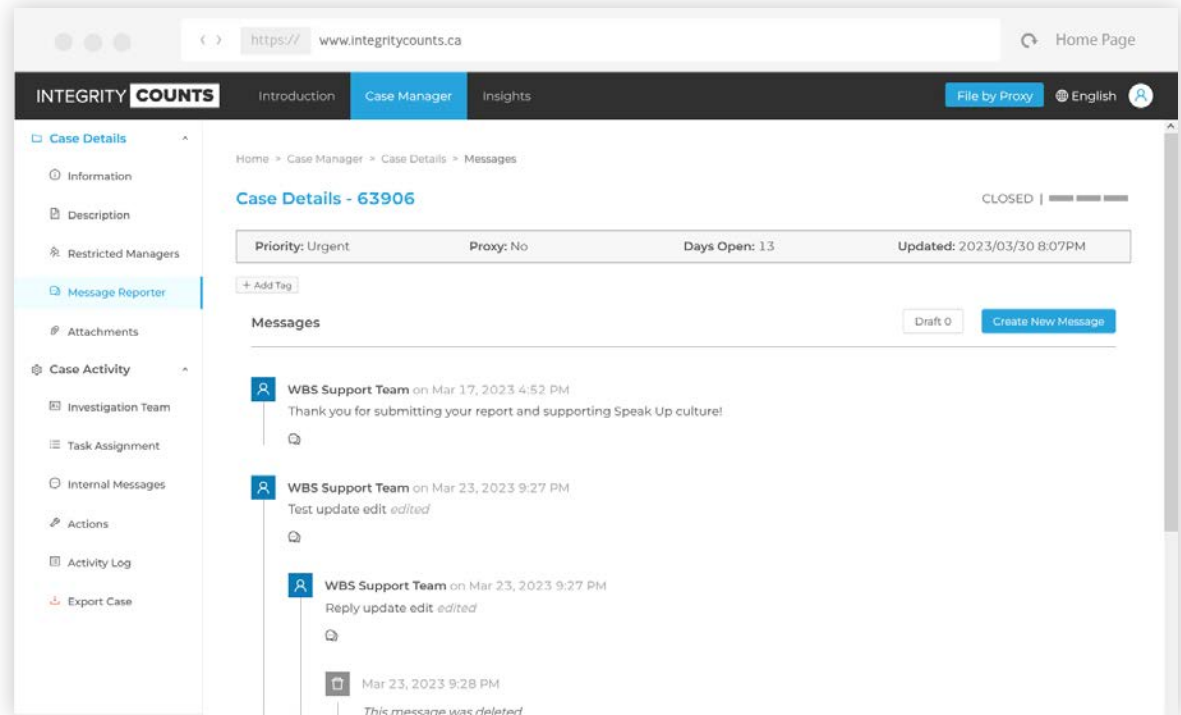
## Case Details - Restricted Managers



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.

INTEGRITY COUNTS

# Case Manager: Manager View

## Case Details - Message Reporter (View)



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)
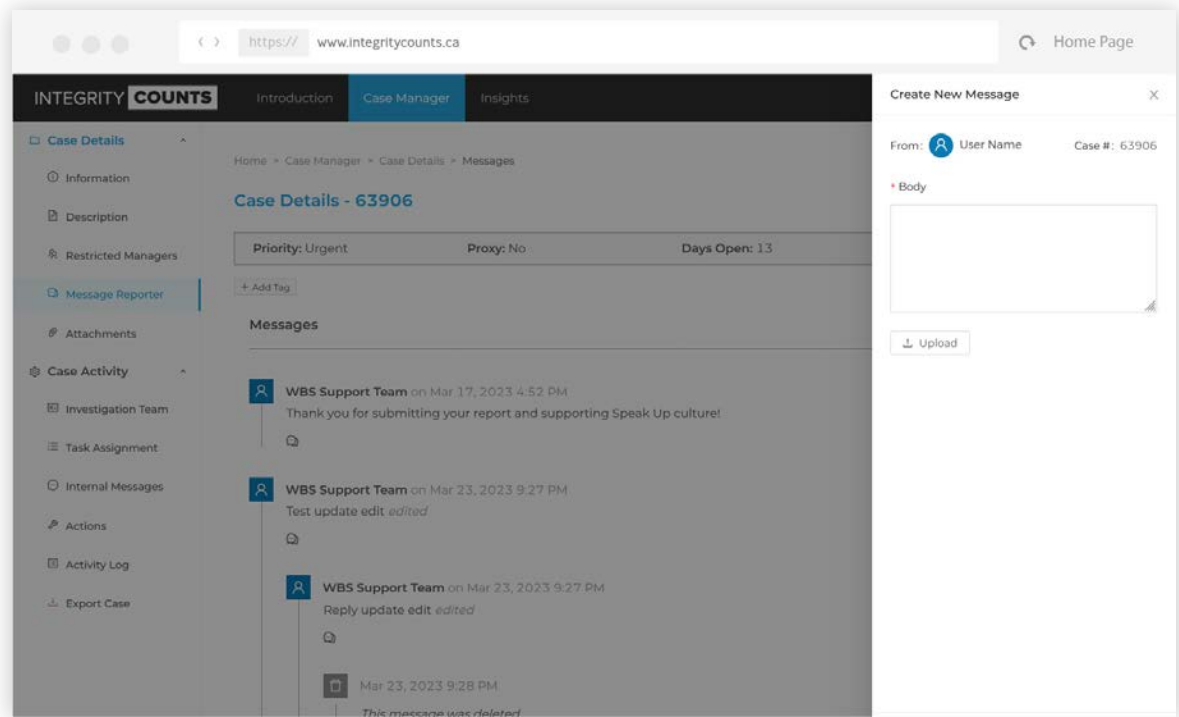


By clicking on the *Create New Message* button in the upper right, the Manager/ Investigator will be presented with an area in which to compose their message. Files can be attached here as well, if necessary.

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.

INTEGRITY COUNTS

# Case Manager: Manager View

## Case Details - Attachments



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



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

INTEGRITY COUNTS

# Case Manager: Manager View
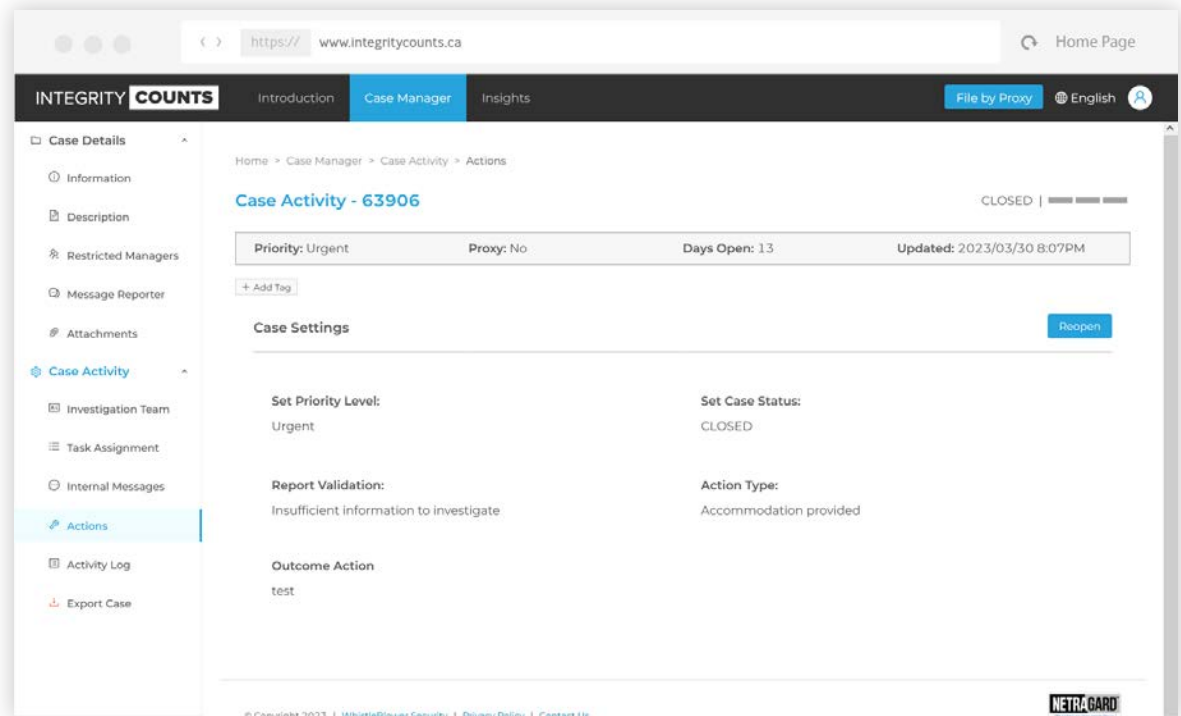
## Case Activity - Internal Messages



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



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.

# Insights

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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.

INTEGRITY COUNTS